



SunLine Transit Agency/
SunLine Services Group
July 23, 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**

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 business hours or less prior to the meeting, which are public records relating to open-session agenda items, will be available for inspection by members of the public prior to or at the meeting at SunLine Transit Agency's Administration Building, 32505 Harry Oliver Trail, Thousand Palms, CA 92276 and on the Agency's website, www.sunline.org.

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

ITEM

RECOMMENDATION

1. CALL TO ORDER

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

2. FLAG SALUTE

ITEM

RECOMMENDATION

3. ROLL CALL

4. 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

a) Recognition of Past Chairperson Ross

b) 2025 Safety Slogan Winner

(Presenter: Richard Powers, Safety Manager)

c) Quarterly Marketing Update

(Presenter: Carmen Cubero, Marketing & Events Manager)

(PAGE 5-12)

d) September 2025 Fixed Route Service Change

(Presenter: Isabel Vizcarra, Chief Transportation Officer)

(PAGE 13-17)

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
May 2025**

(PAGE 18-22)

**8b) Acceptance of Credit Card Statement for
May 2025**

(PAGE 23-38)

**8c) Acceptance of Monthly Budget Variance Report for
May 2025**

(PAGE 39-43)

**8d) Acceptance of Contracts Signed between \$25,000
and \$250,000 for May 2025**

(PAGE 44-45)

**8e) Acceptance of Union & Non-Union Pension Investment
Asset Summary May 2025**

(PAGE 46-57)

ITEM

RECOMMENDATION

- | | |
|--|--------------------------------------|
| 8f) Acceptance of Ridership Report for May 2025 | (PAGE 58-61) |
| 8g) Acceptance of SunDial Operational Notes for May 2025 | (PAGE 62-64) |
| 8h) Acceptance of Metrics for May 2025 | (PAGE 65-85) |
| 8i) Acceptance of Board Member Attendance Report for June 2025 | (PAGE 86-87) |
| 8j) Approval of Joint Board Meeting Minutes for June 25, 2025 | (PAGE 88-93) |
| 8k) Acceptance of SSG/SRA Checks \$1,000 and Over Report for May 2025 | (PAGE 94-95) |
| 8l) Acceptance of SSG Monthly Budget Variance Report for May 2025 | (PAGE 96-98) |
| 8m) Acceptance of Taxi Trip Data Report – May 2025 | (PAGE 99-100) |
| 8n) Acceptance of Ratification of Provisional Committee Appointments | (PAGE 101-103) |
|
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| 9. AWARD OF CONTRACT FOR SECURITY FENCE UPGRADE
(John Peña, Chair of Finance/Audit Committee;
Staff: Walter Watcher, Chief of Capital Projects) | APPROVE
(PAGE 104-108) |
|
 | |
| 10. AWARD OF CONTRACT FOR NATURAL GAS (NG) BACK-UP GENERATOR
(John Peña, Chair of Finance/Audit Committee;
Staff: Walter Watcher, Chief of Capital Projects) | APPROVE
(PAGE 109-112) |
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| 11. SUBMIT REQUEST TO THE COUNTY OF RIVERSIDE TO VACATE HASKELL ROAD AND REMOVE EASEMENTS
(John Peña, Chair of Finance/Audit Committee;
Staff: Walter Watcher, Chief of Capital Projects) | APPROVE
(PAGE 113-117) |
|
 | |
| 12. ADOPT REAL PROPERTY POLICY
(Nancy Ross, Chair of Board Operations Committee;
Staff: Walter Watcher, Chief of Capital Projects) | APPROVE
(PAGE 118-123) |
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| 13. RECEIVE UPDATE ON THE FISCAL YEAR 2024-25 GOALS, STRATEGIC OBJECTIVES AND PRIORITIES AND PROVIDE FEEDBACK
(Staff: Greg Wildman, Chief of Strategic Alignment) | DISCUSSION
(PAGE 124-158) |
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 | |
| 14. LEGISLATIVE UPDATE FOR JULY 2025
(Staff: Edith Hernandez, Director of Board and Legislative Affairs) | INFORMATION
(PAGE 159-164) |

ITEM

RECOMMENDATION

15. CEO/GENERAL MANAGER'S REPORT

16. NEXT MEETING DATE

September 24, 2025 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

17. ADJOURN

April - June 2025

Quarterly Marketing Update

Presented by: Carmen Cubero, Marketing & Events Manager

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July 23, 2025

www.SunLine.org





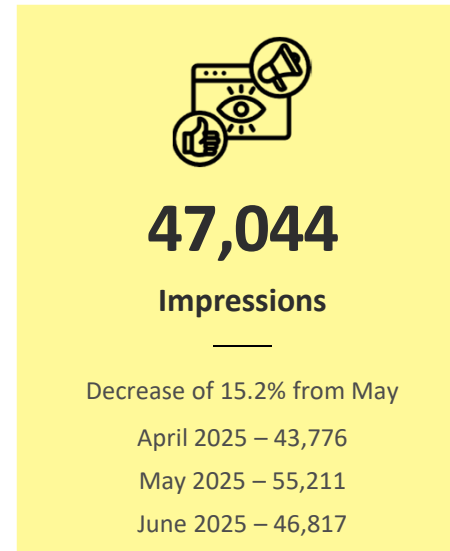
April - June 2025

In Focus

- Brand Awareness & Digital Performance
- Ridership & Community Engagement
 - Community Outreaches, SunLine Events & Other Community Events
- What is New and Next – Q3 2025
 - Internal Updates
 - Next Events

Social Media Growth

Post content for the quarter: Pantry to the People, 12th Annual Veterans' Expo, SunLine Hiring Event, Free Ride Days, Community Outreach Events, Travel Trainings, Stroke Awareness Month, Empowered Documentary, Student Art Contest, Marketing's How to Ride the Bus Field Day





Publicity Report

Brand Awareness & Digital Performance



173,140

Local Market Viewership

April - June 2025



\$23,354.23

Value of Coverage

April - June 2025



News Outlets

KESQ (ABC), KDFX (FOX), KMIR (NBC), and KPSP (CBS)



Outreaches, SunLine Events & Community Events

Pantry to the People
April 3, 2025



Earth & Arbor Day
April 26, 2025



May Service Change
May 4, 2025



Kennedy Elementary School
Professional Vehicle Day



12 Annual Veterans' Expo
April 5, 2025



American Heart Association Executive Breakfast
May 7, 2025

May 1, 2025

Outreaches, SunLine Events & Community Events

Travel Training at RUHS
Behavioral Health Peer Center
May 19, 2025



Día de los Niños in Indio
April 17, 2025



Day of the Child in DHS
June 7, 2025



GCVCC 2025 Annual
Installation and Business
Awards Dinner



Riverside University Health
System (RUHS) Fiesta Week
May 14, 2025



Career Day at Agua Caliente Elementary
June 2, 2025

June 6, 2025

What Is New & Next



Employee Summer Event

Snow cone social will be held on August 14, 2025, for all employees



Unified Branding

SunLine Apparel Catalog, Email signatures, logos, colors and fonts



Website Redesign

New website launched in July 2025



Haunted Bus

Haunted Bus will be on October 30, 2025, at Village Fest in Palm Springs



Thank You

marketing@sunline.org

760.343.3456

   @SunLineTransit

32505 Harry Oliver Trail, Thousand Palms, CA 92276





September 2025 Fixed Route Service Change

Presented by: Isabel Vizcarra, Chief Transportation Officer

July 23, 2025

MEMORANDUM OF UNDERSTANDING

BETWEEN

SUNLINE TRANSIT AGENCY

AND

AMALGAMATED TRANSIT UNION
LOCAL 1277

April 1, 2022 through March 31, 2025



Per our Collective Bargaining agreement with Amalgamated Transit Union Local 1277, we are required to have three (3) service changes per year.

These changes go into effect in January, May, and September.

Service Change - Headways

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

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

September Service Change

Changes for September 2025

Route 1WV and Route 2: Developed route timing to improve service in the PM.

Route 1EV Alignment: Improved PM transfer times for Route 1WV.

Streamlined Route 8 Service: Modified running times and removed a specific timepoint to increase connections with Route 1EV and enhance on-time performance.



Questions?

SunLine Transit Agency**CONSENT CALENDAR**

DATE: July 23, 2025

APPROVETO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Checks \$1,000 and Over Report May 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 May which required signature from the Chair or Vice Chair.

Vendor	Check #	Amount
<i>A-Z Bus Sales Inc.</i>	699794	\$798,958.58
<i>Clever Devices Ltd</i>	699801	\$271,495.02
<i>Integrated Cryogenic Solutions</i>	699821	\$159,885.12
<i>Integrated Cryogenic Solutions</i>	699676	\$158,149.47
<i>Nomad Transit</i>	699707	\$143,987.50
<i>Trapeze Software Group Inc</i>	699850	\$103,916.03
<i>Hanson Bridgett LLP</i>	699817	\$77,682.41
<i>Atkinson, Andelson, Loya Ruud And Romo</i>	699649	\$53,023.47

Recommendation:

Approve.

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
A-Z BUS SALES INC	WIP-Replacement Paratransit Buses- Project Acct#2205-00	699794	05/21/2025	798,958.58
CALPERS	Group Health Premiums	699797	05/21/2025	444,855.48
PERMA - INSURANCE	General Liability/Workers Comp Premiums	699692	05/07/2025	360,698.00
CLEVER DEVICES LTD.	WIP-Radio System Replacement-Project Acct#1905-02	699801	05/21/2025	271,495.02
INTEGRATED CRYOGENIC SOLUTIONS LLC	Fuel - Liquid Hydrogen	699821	05/21/2025	159,885.12
INTEGRATED CRYOGENIC SOLUTIONS LLC	Fuel - Liquid Hydrogen	699676	05/07/2025	158,149.47
NOMAD TRANSIT, LLC (DISREGARDED ENTITY	SunRide Ride Share Expenses	699707	05/07/2025	143,987.50
TRAPEZE SOFTWARE GROUP INC.	Computer/Network Software Agreement	699850	05/21/2025	103,916.03
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	699776	05/14/2025	88,259.16
HANSON BRIDGETT LLP	Legal Service	699817	05/21/2025	77,682.41
IMPERIAL IRRIGATION DIST	Utilities	699741	05/14/2025	65,305.30
SO CAL GAS CO.	Utilities	699769	05/14/2025	57,189.42
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	699649	05/07/2025	53,023.47
METLIFE	Supplement Benefits LTD/STD/LIFE/Dental Ins Premium	699892	05/28/2025	46,838.97
TRANE U.S. INC.	Contract Services- H2	699904	05/28/2025	42,533.00
DAHL, TAYLOR AND ASSOCIATES, INC.	WIP- Indio CNG Station Upgrade- Project Acct#2210-00	699876	05/28/2025	41,983.70
ANEW RNG, LLC	Utilities	699793	05/21/2025	41,254.49
BALLARD POWER SYSTEMS	Inventory Repair Parts	699720	05/14/2025	39,910.60
HELIXSTORM	Computer/Network Software Agreement	699819	05/21/2025	39,874.00
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	699872	05/28/2025	39,617.50
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	699752	05/14/2025	35,530.36
ALL AMERICAN BUILDING SERVICES INC	WIP-Facility Improvement Project- Project Acct#2203-01	699643	05/07/2025	30,152.85
AIRWAVE COMMUNICATIONS	WIP-Radio System Replacement-Project Acct#1905-01	699866	05/28/2025	29,700.00
HELIXSTORM	Contracted Services	699818	05/21/2025	23,470.10
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	699711	05/07/2025	22,583.68
CPAC INC.COM	Computer/Network Software Agreement	699659	05/07/2025	21,426.35
NFI PARTS	Inventory Repair Parts	699713	05/14/2025	20,707.62
CLEVER DEVICES LTD.	WIP-Radio System Replacement-Project Acct#1905-02	699656	05/07/2025	19,117.50
SONSRAY FLEET SERVICES	Inventory Repair Parts	699773	05/14/2025	18,560.99
KL2 CONNECTS LLC	Recruiting Employees	699680	05/07/2025	18,450.00
TEC EQUIPMENT, INC.	Inventory Repair Parts	699902	05/28/2025	18,414.42
eSCRIBE SOFTWARE LTD	Computer/Network Software Agreement	699731	05/14/2025	16,162.66
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	699893	05/28/2025	14,146.40
NFI PARTS	Inventory Repair Parts	699784	05/21/2025	12,566.35
TRUGUARD SECURITY SERVICES, INC	Security Guard Services	699775	05/14/2025	11,810.96
CV STRATEGIES	Contracted Services	699804	05/21/2025	11,735.00
GILLIG LLC	Inventory Repair Parts	699815	05/21/2025	11,701.98
MAKAI SOLUTIONS	WIP-Fixed Assets Equipment-Project Acct#2310-02	699828	05/21/2025	10,751.55
NFI PARTS	Inventory Repair Parts	699864	05/28/2025	10,597.76

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
DOVE PRINTING	Printing Expense	699825	05/21/2025	9,980.63
DAHL, TAYLOR AND ASSOCIATES, INC.	WIP-Electric Meter Generator Engineering-Project Acct#2313	699661	05/07/2025	9,392.00
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	699664	05/07/2025	9,349.00
NFI PARTS	Inventory Repair Parts	699641	05/07/2025	9,243.97
SHAW YODER ANTWIH SCHMELZER & LANGE, INC	Consulting	699843	05/21/2025	9,000.00
ROBERT HALF	Temporary Help	699840	05/21/2025	8,964.40
ROBERT HALF	Temporary Help	699699	05/07/2025	8,964.40
ROBERT HALF	Temporary Help	699765	05/14/2025	8,853.98
ROBERT HALF	Temporary Help	699900	05/28/2025	8,573.20
GLOBAL INDUSTRIAL	WIP-Fixed Assets-Office Furniture-Project Acct#2418-13	699737	05/14/2025	8,347.38
AMERICAN MOVING PARTS	Inventory Repair Parts	699791	05/21/2025	8,200.13
GILLIG LLC	Inventory Repair Parts	699736	05/14/2025	8,083.09
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	699841	05/21/2025	7,953.27
SCOTT FAMILY TOOLS	WIP-Fixed Assets-SunFuels-Project Acct#2412-04	699744	05/14/2025	7,820.88
PACIFIC LIFT AND EQUIPMENT INC	Facility Maintenance	699756	05/14/2025	7,500.57
JE STRATEGIES LLC	Consulting	699822	05/21/2025	7,500.00
AMAZON CAPITAL SERVICES, INC	WIP-Information Technology Project-Project Acct#2418-12	699788	05/21/2025	6,880.40
AMALGAMATED TRANSIT UNION	Union Dues	699716	05/14/2025	6,240.30
PARAGON ID HIGH POINT US	Printing Expense	699690	05/07/2025	5,996.29
WESTGATE CENTER FOR LEADERSHIP	Travel Meetings/Seminars	699782	05/14/2025	5,990.00
HEPTAGON SEVEN CONSULTING, INC.	WIP-Facility Improvement Project- Project Acct#2302-01	699740	05/14/2025	5,925.00
IMPERIAL IRRIGATION DIST	Utilities	699887	05/28/2025	5,896.17
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	699700	05/07/2025	5,761.01
RWC GROUP	Inventory Repair Parts	699735	05/14/2025	5,453.05
GILLIG LLC	Inventory Repair Parts	699883	05/28/2025	5,319.97
PIEDMONT PLASTICS, INC.	Bus Stop Supplies	699759	05/14/2025	5,307.98
IMPERIAL IRRIGATION DIST	WIP- Indio CNG Station Upgrade- Project Acct#2210-00	699675	05/07/2025	5,000.00
PNEUMATIC CONTROL, INC	Repair Parts-CNG	699694	05/07/2025	4,938.86
TPX COMMUNICATIONS	Communication Service	699774	05/14/2025	4,867.30
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	699792	05/21/2025	4,830.00
AMERICAN LAMINATED GLASS	Inventory Repair Parts	699803	05/21/2025	4,511.97
FORENSIC DRUG TESTING SERVICES	Alcohol & Drug Testing	699733	05/14/2025	4,454.30
GENFARE, LLC	Bank Adjustment Fees	699672	05/07/2025	4,392.46
ALLIED REFRIGERATION, INC	Freon & Coolant	699867	05/28/2025	4,386.57
TRI-STATE MATERIALS, INC.	WIP-Facility Improvement Project- Project Acct#2203-02	699851	05/21/2025	4,343.85
SONSRAY FLEET SERVICES	Inventory Repair Parts	699848	05/21/2025	4,221.38
RIDECO US INC	SunRide Ride Share Expenses	699698	05/07/2025	4,027.90
HOME DEPOT CREDIT SERVICES	Facility Maintenance	699885	05/28/2025	3,894.11
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	699834	05/21/2025	3,763.13

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
OMNITRACS, LLC	General Services	699686	05/07/2025	3,640.00
JOSEPH LYNN FRIEND	Contracted Services	699747	05/14/2025	3,630.00
CUMMINS SALES AND SERVICE	Computer/Network Software Agreement	699660	05/07/2025	3,360.00
CHARTER COMMUNICATIONS	Utilities	699703	05/07/2025	3,282.72
AMAZON CAPITAL SERVICES, INC	Office Supplies	699646	05/07/2025	3,189.12
BROADLUX, INC.	Contract Services-General	699795	05/21/2025	3,152.00
PRUDENTIAL OVERALL SUPPLY	Uniforms	699696	05/07/2025	3,040.05
HD INDUSTRIES	Inventory Repair Parts	699739	05/14/2025	3,019.70
TAMARA MILES	Reimbursement Expense	699847	05/21/2025	2,875.86
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	699651	05/07/2025	2,829.29
SONSRAY FLEET SERVICES	Inventory Repair Parts	699903	05/28/2025	2,632.62
QUICK FIX AUTO GLASS	Repair Parts-Fuel Cell	699786	05/21/2025	2,575.00
FEDEX	Shipping Service	699809	05/21/2025	2,565.68
GARON WYATT INVESTIGATIVE SERVICES, LLC.	Insurance Loss	699882	05/28/2025	2,513.99
FRONTIER COMMUNICATIONS	Utilities- OPS Bldg	699813	05/21/2025	2,500.00
CHRISTIAN BROTHERS MECHANICAL SERVICES,	Contracted Services-General	699654	05/07/2025	2,500.00
OPW FUELING COMPONENTS	Inventory Repair Parts-SunFuels	699688	05/07/2025	2,478.28
CNTY OF RIVERSIDE DEPT OF ENVIRONMENTAL	Permits & Licenses	699657	05/07/2025	2,408.00
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	699721	05/14/2025	2,373.82
JILL PLAZA	Reimbursement Expense	699860	05/23/2025	2,361.70
CDW GOVERNMENT, INC	Computer Supplies	699798	05/21/2025	2,303.50
CAROLYN C. GIGLIO	Reimbursement Expense	699859	05/23/2025	2,300.27
C V WATER DISTRICT	Utilities	699802	05/21/2025	2,290.22
YELLOW CAB OF THE DESERT	Taxi Voucher Program	699908	05/28/2025	2,268.89
EVERSOFT, INC.	Contract Services	699808	05/21/2025	2,266.06
KIRK'S AUTOMOTIVE, INC.	Inventory Repair Parts	699823	05/21/2025	2,262.75
NORTHERN SAFETY COMPANY, INC.	Inventory Repair Parts	699830	05/21/2025	2,235.60
STANTEC ARCHITECTURE, INC.	WIP-Electrolyzer H2 Fueling Station-Project Acct#2014-00	699771	05/14/2025	2,153.45
ENTECH OIL INC	Lubricants- Oil	699807	05/21/2025	2,093.42
ENTECH OIL INC	Lubricants- Oil	699880	05/28/2025	2,074.19
FULTON DISTRIBUTING	Bus Stop Supplies	699728	05/14/2025	2,007.90
VIRGINKAR AND ASSOCIATES, INC.	WIP-Upgrade for CAD/AVL System-Project Acct#2309-00	699779	05/14/2025	1,998.00
MIRKO FISCHER	Reimbursement Expense	699894	05/28/2025	1,970.97
GENFARE, LLC	Inventory Repair Parts	699814	05/21/2025	1,934.83
SPORTWORKS NORTHWEST, INC.	Inventory Repair Parts	699846	05/21/2025	1,839.84
INSIGHT STRATEGIES INC	Consulting	699820	05/21/2025	1,825.76
VALLEY OFFICE EQUIPMENT, INC.	Copier Supplies	699854	05/21/2025	1,776.00
ULINE, INC.	Cleaning Supplies-Vehicle	699706	05/07/2025	1,772.87
JACKSON LEWIS P.C.	Insurance Loss	699743	05/14/2025	1,769.00

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
AMAZON CAPITAL SERVICES, INC	Employee Incentive Services	699868	05/28/2025	1,730.12
GRAINGER	Facility Maintenance	699884	05/28/2025	1,674.55
AMAZON CAPITAL SERVICES, INC	Repair Parts-Support Vehicle	699717	05/14/2025	1,649.00
MAGALDI & MAGALDI, INC.	Inventory Repair Parts	699827	05/21/2025	1,610.60
MOHAWK MFG & SUPPLY CO	Inventory Repair Parts	699829	05/21/2025	1,597.48
SECTRAN SECURITY INC.	Bank Adjustment Fees	699766	05/14/2025	1,573.91
A-1 ALTERNATIVE FUEL SYSTEMS/A-1 AUTO	Inventory Repair Parts	699644	05/07/2025	1,532.12
PLAZA TOWING, INC.	Towing Services	699836	05/21/2025	1,525.00
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	699652	05/07/2025	1,520.58
RICON CORPORATION	Inventory Repair Parts	699839	05/21/2025	1,495.33
TRANSIT RESOURCES, INC.	Inventory Repair Parts	699849	05/21/2025	1,482.15
DANIELS TIRE SERVICE - GOOD YEAR	Inventory Repair Parts	699662	05/07/2025	1,461.35
PATRICIA ARELLANO DE MORA	Reimbursement Expense	699691	05/07/2025	1,455.37
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	699719	05/14/2025	1,425.00
EDITH HERNANDEZ	Reimbursement Expense	699665	05/07/2025	1,395.67
LIFECOM, INC.	Contract Services	699826	05/21/2025	1,340.00
PLAZA TOWING, INC.	Towing Services	699760	05/14/2025	1,300.00
LAWYERS TITLE	WIP-Center of Excellence Facility-Project Acct#1808-01	699681	05/07/2025	1,250.00
4IMPRINT, INC.	Employee Expense	699783	05/21/2025	1,213.55
WALTERS WHOLESALE ELECTRIC CO.	Facility Maintenance	699855	05/21/2025	1,193.94
ON THE FLY TERMITE AND PEST CONTROL	Pest Control Services	699687	05/07/2025	1,192.00
ABSOLUTE SELF STORAGE	Storage Rental	699862	05/28/2025	1,152.00
TOTAL CARE WORK INJURY CLINIC	Medical Exam & Testing	699710	05/07/2025	1,125.00
US BANK VOYAGER FLEET SYSTEMS	Unleaded/Diesel Fuel	699778	05/14/2025	1,116.55
YOLANDA GARCIA	Reimbursement Expense	699909	05/28/2025	1,099.82
LANGUAGELINE SOLUTIONS	Translation Services	699824	05/21/2025	1,082.88
TEAMSTERS LOCAL 1932	Union Dues	699772	05/14/2025	1,079.17
ALPHA MEDIA LLC	Advertising	699645	05/07/2025	1,050.00
CINTAS CORPORATION NO.2	Emergency Preparedness Supplies	699655	05/07/2025	1,048.05
HIRERIGHT, LLC	Background Service	699658	05/07/2025	1,038.15
SUN CHEMICAL	Cleaning Supplies-Vehicle	699838	05/21/2025	1,034.40
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	699758	05/14/2025	1,020.40
QUADIENT FINANCE USA, INC.	Postage	699697	05/07/2025	1,000.00
Total Checks Over \$1,000	\$3,826,668.14			
Total Checks Under \$1,000	\$40,674.50			
Total Checks	\$3,867,342.64			

SunLine Transit Agency

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Credit Card Statement for May 2025

Summary:

The attached report summarizes the Agency's credit card expenses for May 2025. The report summarizes transactions for the credit cards which align with the statement closing date of May 30, 2025.

Recommendation:

Approve.

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 05/30/2025

Name on Card: Ray Stevens (Procurement Card)

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	04/30/25	5/1/2025	Stadia Maps, Inc.	Standard Maps API Subscription for 12 Months		\$ 980.00
2	04/30/25	5/1/2025	Expedia	APTA Legislative Conference - Washington D.C. Luis Garcia - Flight Expense (Booking Fee)		\$ 11.69
3	04/30/25	5/1/2025	Toll Roads of OC	Toll Roads Expense VEH#2201 Ford Explorer Hybrid		\$ 122.64
4	04/30/25	5/2/2025	APTA	APTA Legislative Conference - Washington D.C. Luis Garcia - Registration Fee		\$ 1,275.00
5	04/30/25	5/2/2025	American	APTA Legislative Conference - Washington D.C. Luis Garcia - Flight Expense		\$ 254.18
6	04/30/25	5/2/2025	United	APTA Legislative Conference - Washington D.C. Luis Garcia - Flight Expense		\$ 424.23
7	05/01/25	5/2/2025	APTA	California Transit Association 2025 Spring Legislative Conference Registration Fee - Edith Hernandez		\$ 320.00
8	05/01/25	5/5/2025	Marriott	American Bus Benchmarking Workshop Dylan Narz - Lodging Expense Balance		\$ 0.01
9	05/01/25	5/5/2025	Southwest	APTA Legislative Conference - Washington D.C. Edith Hernandez - Flight Expense		\$ 527.96
10	05/01/25	5/5/2025	Marriott	American Bus Benchmarking Workshop Marina Blackstone - Lodging Expense Balance		\$ 0.01
11	05/02/25	5/5/2025	Sam's Club	Boardroom Supplies		\$ 304.78
12	05/05/25	5/7/2025	Springhill Suites	SMS Principals in Transit Richard Powers - Lodging Expense		\$ 1,127.36
13	05/09/25	5/12/2025	On-site Gas Systems	Purchase of Electrolyzer Nitrogen Generator Filters		\$ 261.48
14	05/09/25	5/12/2025	Asher Adams	TransitTech Executive Summit Paul Mattern - Lodging Expense		\$ 788.66
15	05/13/25	5/14/2025	APTA	CA Transit Assoc. 60th Annual Fall Conf. & Expo Mona B. - Registration Fee		\$ 625.00
16	05/13/25	5/16/2025	PayPal	CA Professional Municipal Clerk (CPMC) for Vanessa Ordorica		\$ 1,500.00
17	05/14/25	5/15/2025	Tahquitz Pines Retreat	Greater Coachella Valley Chamber of Commerce (GCVCC) Annual Board Retreat - Idyllwild, CA Mona B. - Lodging Expense		\$ 197.01

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
18	05/14/25	5/15/2025	Jackson Racing	Fuel Cell Bus Specialized Oil & Filter		\$ 1,435.79
19	05/15/25	5/15/2025	Brimar Industries	Hydration Area Sign - Credit for Incorrect Sign	\$ (48.28)	
20	05/15/25	5/16/2025	Other Debits	Dedicated Graphic Card for Maintenance Laptop - Conversion Fee		\$ 7.24
21	05/15/25	5/16/2025	NNA Services	National Notary Association Training for Selena Montes		\$ 623.90
22	05/15/25	5/16/2025	Rugged Books, Inc.	Dedicated Graphic Card for Maintenance Laptop		\$ 724.00
23	05/16/25	5/19/2025	Comfort Inns	ZEBRA & Roundtable Conference - Missoula, MT Shawn Craycraft - Lodging Expense		\$ 364.58
24	05/19/25	5/21/2025	Hotel Washington	APTA Legislative Conference, Washington D.C. Edith Hernandez - Lodging Expense		\$ 462.64
25	05/20/25	5/21/2025	GCVCC	GCVCC Annual Board Retreat Mona B. - Retreat Fee & Meals		\$ 325.00
26	05/22/25	5/26/2025	PayPal	CVAG General Assembly 2025 Event Mona B. Luis G. & Edith H. - Registration Fee		\$ 154.25
27	05/23/25	5/26/2025	Certus Fusion Training	Safety Officer CAL-OSHA 30 Training for Rudy Ortega		\$ 247.79
28	05/24/25	5/26/2025	Harbor Freight Tools	Socket Rails for SunFuels		\$ 340.70
29	05/27/25	5/28/2025	North State	2025 North State Transit Symposium for Mona Babauta - Registration Fee		\$ 108.55
30	05/27/25	5/28/2025	Southwest	APTA Legislative Conference Edith Hernandez - Flight Credit	\$ (215.18)	
Totals:					\$ (263.46)	\$ 13,514.45



Reporting Period : 5/1/2025 - 5/30/2025

Statement Summary

Name	Ray Stevens			Company	Sunline Transit Agency		
Account #	XXXX-XXXX-XXXX			Currency	US Dollar		
Reporting Period	5/1/2025 - 5/30/2025						
Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 4/30/2025	5/1/2025	Stadia Maps, Inc Stadiamaps.Co, MI					980.00
Purchase Stadia Maps, Inc			General Ledger Code: 5030300011				
PR 22939 - Standard Maps API Subscription 12 months				IT Department - 00-42-5030300011			
2 4/30/2025	5/1/2025	Expedia 73094625342677 Expedia.Com, WA					11.69
Purchase Expedia 73094625342677			General Ledger Code: 5090200000				
Approved Travel for Luis Garcia - 2025 APTA Legislative Conference - Expedia Booking Fee				Finance Department - 00-41-5090200000			
3 4/30/2025	5/1/2025	The Toll Roads Of Oc 949-727-4800, CA					122.64
Purchase The Toll Roads Of Oc			General Ledger Code: 5090200000				
PR 22994 - The Toll Roads for VEH#2201 Ford Explorer Hybrid				Safety Department - 00-15-5090200000			
4 4/30/2025	5/2/2025	Apta 202-4964800, DC					1,275.00
Purchase Apta			General Ledger Code: 5090100000				
Approved Travel for Luis Garcia - 2025 APTA Legislative Conference - Registration Fee				Finance Department - 00-41-5090200000			
5 4/30/2025	5/2/2025	American Air Fort Worth, TX					254.18
Purchase American Air			General Ledger Code: 5090200000				
Approved Travel for Luis Garcia - 2025 APTA Legislative Conference - Flight Charge				Finance Department - 00-41-5090200000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
6 4/30/2025	5/2/2025	United United.Com, TX					424.23
Purchase United			General Ledger Code: 5090200000				
Approved Travel for Luis Garcia - 2025 APTA Legislative Conference				Finance Department - 00-41-5090200000			
7 5/1/2025	5/2/2025	Fsp*cta 916-446-4656, CA					320.00
Purchase Fsp*cta			General Ledger Code: 5090100000				
Approved Travel for Edith Hernandez - 2025 APTA Legislative Conference - Registration Fee				Executive Department - 00-40-5090200000			
8 5/1/2025	5/5/2025	Ac Hotel By Marriott D Dayton, OH					0.01
Purchase Ac Hotel By Marriott D			General Ledger Code: 5090200000				
Approved Travel for Dylan Narz - American Benchmarking Group Workshop - Lodging Charge				Transportation Department - 00-40-5090200000			
9 5/1/2025	5/5/2025	Southwes Southwest.Com, TX					527.96
Purchase Southwes			General Ledger Code: 5090200000				
Approved Travel for Edith Hernandez - 2025 APTA Legislative Conference - Flight Charge				Executive Department - 00-40-5090200000			
10 5/1/2025	5/5/2025	Ac Hotel By Marriott D Dayton, OH					0.01
Purchase Ac Hotel By Marriott D			General Ledger Code: 5090200000				
Approved Travel for Marina Blackstone- American Benchmarking Group Workshop - Lodging Charge				Transportation Department - 00-40-5090200000			
11 5/2/2025	5/5/2025	Samsclub #6609 Palm Desert, CA					304.78
Purchase Samsclub #6609			General Ledger Code: 5099900002				
PR 23004 - Board Room Supplies				Facilities Department - 00-23-5049900002			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
12 5/5/2025	5/7/2025	Springhill Suites Pittsburgh, PA					1,127.36
Purchase Springhill Suites			General Ledger Code: 5090200000				
Approved Travel for Richard Powers - SMS - Principles in Transit				Safety Department - 00-15-5090200000			
13 5/9/2025	5/12/2025	On Site Gas Systems Inc 860-6678888, CT					261.48
Purchase On Site Gas Systems Inc			General Ledger Code: 5099900002				
PR 22970 - Electrolyzer Nitrogen Generator Filters				SunFuels Department - 00-10-5049900011			
14 5/9/2025	5/12/2025	Asher Adams An Autogra Salt Lake Cit, UT					788.66
Purchase Asher Adams An Autogra			General Ledger Code: 5090200000				
Approved Travel for Paul Mattern – Transit Tech Summit - Lodging Charge				Planning Department - 00-49-5090200000			
15 5/13/2025	5/14/2025	Fsp*cta 916-446-4656, CA					625.00
Purchase Fsp*cta			General Ledger Code: 5090100000				
Conference for Mona Babauta – California Transit Association's 60th Annual Fall Conference & EXPO				Executive Department - 00-40-5090200000			
16 5/13/2025	5/16/2025	Paypal 4029357733, CA					1,500.00
Purchase Paypal			General Ledger Code: 5030400000				
California Professional Municipal Clerk (CPMC) 300 Session for Vanessa Ordorica				Executive Department - 00-40-5090200000			
17 5/14/2025	5/15/2025	Tahquitz Pines Retreat Www.Tahquitzp, CA					197.01
Purchase Tahquitz Pines Retreat			General Ledger Code: 5090200000				
Tahquitz Pines Retreat for Mona Babauta				Executive Department - 00-40-5090200000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
18 5/14/2025	5/15/2025	Jackson Racing 909-927-8500, CA					1,435.79
Purchase Jackson Racing			General Ledger Code: 5049900022				
PR 23000 - INV ROTREX SX150 FLUID				Finance Department - 00-00-1030101200			
19 5/15/2025	5/15/2025	Brimar Industries 973-340-7889, NJ					-48.28
Credit Voucher Brimar Industries			General Ledger Code: 5099900002				
PR 22706 - Hydration Area Sign for Safety - Credit for Incorrect Sign				Safety Department - 00-15-5049900009			
20 5/15/2025	5/16/2025						7.24
Other Debits Currency Conversion Fee							
PR 23044 - Dedicated graphic Card - Currency Fee				Maintenance Department - 00-22-5049900017			
21 5/15/2025	5/16/2025	Nna Services Llc Www.Nationaln, CA					623.90
Purchase Nna Services Llc			General Ledger Code: 5039903800				
PR 23089 - National Notary Association Training for Selena Montes				Executive Department - 00-40-5099900002			
22 5/15/2025	5/16/2025	Sp Rugged Books Inc. Niagara-On-Th, ON					724.00
Purchase Sp Rugged Books Inc.			General Ledger Code: 5049900010				
PR 23044 - Dedicated graphic Card				Maintenance Department - 00-22-5049900017			
23 5/16/2025	5/19/2025	Comfort Inns Missoula, MT					364.58
Purchase Comfort Inns			General Ledger Code: 5090200000				
Approved Travel for Shawn Craycraft - ZEBRA Conference - Lodging Charge				SunFuels - 00-10-5090200000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
24 5/19/2025	5/21/2025	Hotel Washington 202-6612400, DC					462.64
Purchase Hotel Washington			General Ledger Code: 5090200000				
Approved Travel for Edith Hernandez - 2025 APTA Legislative Conference - Lodging Charge				Executive Department - 00-40-5090200000			
25 5/20/2025	5/21/2025	Gcvcc Gcvcc.Org, CA					325.00
Purchase Gcvcc			General Ledger Code: 5090100000				
GCVCC Annual Board Retreat for Mona Babauta				Executive Department - 00-40-5090200000			
26 5/22/2025	5/26/2025	Paypal 402-935-7733, CA					154.25
Purchase Paypal			General Ledger Code: 5099900002				
PR 23158 - Registration for CVAG General Assembly 2025 event - Mona Babauta, Edith Hernandez, and Luis Garcia				Executive Department - 00-40-5090200000 Finance Department - 00-41-5090200000			
27 5/23/2025	5/26/2025	Certus Fusion Training Www.Certus.Co, FL					247.79
Purchase Certus Fusion Training			General Ledger Code: 5090200001				
PR 23097 - Safety Officer CAL-OSHA 30 Training for Rudy Ortega				Safety Department - 00-15-5090200000			
28 5/24/2025	5/26/2025	Harbor Freight Tools 805-388-1000, CA					340.70
Purchase Harbor Freight Tools			General Ledger Code: 5049900011				
PR 23151 - Socket Rails for SunFuels				SunFuels Department - 00-10-5049900400			
29 5/27/2025	5/28/2025	Eb *2025 North State T 801-413-7200, CA					108.55
Purchase Eb *2025 North State T			General Ledger Code: 5039903800				
Conference for Mona Babauta - 2025 North State Transit Symposium				Executive Department - 00-40-5090200000			

Transaction Count: 30
Total: 13,250.99

Authorized Approver Signature	Date
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SunLine Transit Agency Visa Credit Card Statement

Closing Date: 05/30/2025

Name on Card: Walter Watcher (Procurement Card)

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	05/08/25	5/9/2025	Project Mgmt Institute	PMP Annual Membership for Dioselyn Ayala Morena		\$ 154.00
2	05/15/25	5/15/2025	Canva.com	Yearly Canva Subscription for Operations Department		\$ 120.00
3	05/15/25	5/16/2025	Maply	Yearly Maply Max Subscription for Safety Department - Conversion Fee		\$ 4.68
4	05/15/25	5/16/2025	Maply	Yearly Maply Max Subscription for Safety Department		\$ 468.00
5	05/15/25	5/16/2025	Canva.com	Yearly Canva Subscription for Safety Department		\$ 120.00
Totals:					\$ -	\$ 866.68



Reporting Period : 5/1/2025 - 5/30/2025

Statement Summary

Name		Walter Watcher			Company		Sunline Transit Agency		
Account #		XXXX-XXXX-XXXX- <div></div>			Currency		US Dollar		
Reporting Period		5/1/2025 - 5/30/2025							
Trans Date	Post Date	Merchant Name	Charge Codes			Approved	Personal	Receipt	Amount
1 5/8/2025	5/9/2025	Project Management Instit Newtown Sq, PA							154.00
Purchase Project Management Instit		General Ledger Code: 5090100000 Fund: 00							
2 5/15/2025	5/15/2025	Canva* I04517-1463143 Canva.Com, DE							120.00
Purchase Canva* I04517-1463143		General Ledger Code: 5030303260 Fund: 00							
3 5/15/2025	5/16/2025								4.68
Other Debits Currency Conversion Fee		Fund: 00							
4 5/15/2025	5/16/2025	Maply Max Subscription Singapore, SIN							468.00
Purchase Maply Max Subscription		General Ledger Code: 5030300011 Fund: 00							
5 5/15/2025	5/16/2025	Canva* I04517-74190391 Canva.Com, DE							120.00
Purchase Canva* I04517-74190391		General Ledger Code: 5030303260 Fund: 00							

Transaction Count: 5

Total: 866.68

Employee Signature **Date**

Authorized Approver Signature **Date**

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 05/30/2025

Name on Card: Mona Babauta

	Trans. Date	Post Date	Reference	Detail - Description	Credits	Charges
1	5/3/2025	5/5/2025	United	California Hydrogen Leadership Summit in Sacramento, CA - United Airlines Roundtrip Flight from Palm Springs, CA to Sacramento, CA; Mona Babauta, CEO/General Manager <i>*unable to attend conference; flight credit shown below*</i>		\$384.20
2	5/7/2025	5/9/2025	United	Credit from United Airlines for Mona Babauta, CEO/General Manager - California Hydrogen Leadership Summit in Sacramento, CA <i>*explanation of flight credit attached*</i>		-\$384.20
3	5/8/2025	5/8/2025	Uber	Via TransitTech Executive Summit in Salt Lake City, UT - Uber ride; Mona Babauta, CEO/General Manager		\$45.55
4	5/8/2025	5/9/2025	Uber	Via TransitTech Executive Summit in Salt Lake City, UT - Uber ride from the airport to hotel; Mona Babauta, CEO/General Manager <i>*receipt 1 of 2*</i>		\$23.93
5	5/9/2025	5/9/2025	Uber	Via TransitTech Executive Summit in Salt Lake City, UT - Uber ride from the airport to hotel; Mona Babauta, CEO/General Manager <i>*receipt 2 of 2*</i>		\$5.00
6	5/9/2025	5/12/2025	Uber	Via TransitTech Executive Summit in Salt Lake City, UT - Uber ride from the hotel to the Salt Lake City, UT airport; Mona Babauta, CEO/General Manager <i>*receipt 1 of 2*</i>		\$21.94
7	5/9/2025	5/12/2025	Asher Adams	Via TransitTech Executive Summit in Salt Lake City, UT - Asher Adams, Autograph Collection Hotel; Mona Babauta, CEO/General Manager		\$788.66
8	5/9/2025	5/12/2025	Uber	Via TransitTech Executive Summit in Salt Lake City, UT - Uber ride Uber ride from the hotel to the Salt Lake City, UT airport; Mona Babauta, CEO/General Manager <i>*receipt 2 of 2*</i>		\$7.00
9	5/18/2025	5/19/2025	Ztrip	2025 APTA Legislative Conference in Washington, DC - Washington Flyer Taxi from airport to hotel; Mona Babauta, CEO/General Manager		\$78.79
10	5/12/2025	5/22/2025	Uber	2025 APTA Legislative Conference in Washington, DC - Uber ride from hotel to airport; Mona Babauta, CEO/General Manager		\$49.56
11	5/21/2025	5/23/2025	Marriott JW Wash DC	2025 APTA Legislative Conference in Washington, DC - JW Marriott Washington, DC Hotel; Mona Babauta, CEO/General Manager		\$1,525.92
12	5/22/2025	5/23/2025	CV Taxi	2025 APTA Legislative Conference in Washington, DC - CV Taxi ride from airport to work; Mona Babauta, CEO/General Manager		\$81.09
Credits and Charges:					\$0.00	\$2,627.44



Reporting Period : 5/1/2025 - 5/30/2025

Statement Summary

Name			Mona Babauta		Company		Sunline Transit Agency		
Account #					Currency		US Dollar		
Reporting Period			5/1/2025 - 5/30/2025						
	Trans Date	Post Date	Merchant Name	Charge Codes		Approved	Personal	Receipt	Amount
1	5/3/2025	5/5/2025	United United.Com, TX						384.20
	Purchase United			General Ledger Code: 5090200000					
<hr/>									
2	5/7/2025	5/9/2025	United United.Com, TX						-384.20
	Credit Voucher United			General Ledger Code: 5090200000					
<hr/>									
3	5/8/2025	5/8/2025	Uber *trip Help.Uber.Com, CA						45.55
	Purchase Uber *trip			General Ledger Code: 5090200000					
<hr/>									
4	5/8/2025	5/9/2025	Uber *trip Help.Uber.Com, CA						23.93
	Purchase Uber *trip			General Ledger Code: 5090200000					
<hr/>									
5	5/9/2025	5/9/2025	Uber *trip Help.Uber.Com, CA						5.00
	Purchase Uber *trip			General Ledger Code: 5090200000					
<hr/>									

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
6 5/9/2025	5/12/2025	Uber *trip Help.Uber.Com, CA					21.94
		Purchase Uber *trip	General Ledger Code: 5090200000				
<hr/>							
7 5/9/2025	5/12/2025	Asher Adams An Autogra Salt Lake Cit, UT					788.66
		Purchase Asher Adams An Autogra	General Ledger Code: 5090200000				
<hr/>							
8 5/9/2025	5/12/2025	Uber *trip Help.Uber.Com, CA					7.00
		Purchase Uber *trip	General Ledger Code: 5090200000				
<hr/>							
9 5/18/2025	5/19/2025	Ztrip Dulles, VA					78.79
		Purchase Ztrip	General Ledger Code: 5090200000				
<hr/>							
10 5/21/2025	5/22/2025	Uber *trip Help.Uber.Com, CA					49.56
		Purchase Uber *trip	General Ledger Code: 5090200000				
<hr/>							
11 5/21/2025	5/23/2025	Marriott Jw Wash Dc 866-435-7627, DC					1,525.92
		Purchase Marriott Jw Wash Dc	General Ledger Code: 5090200000				
<hr/>							

Transaction Count: 12

Total: 2,627.44

Authorized Approver Signature	Date
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SunLine Transit Agency**CONSENT CALENDAR**

DATE: July 23, 2025

APPROVETO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for May 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 1/12th of the annual budget. The FYTD budget values for the month of May 2025 are equal to 11/12^{ths} of the yearly budget.

Year to Date Summary

- As of May 31, 2025, the Agency's FYTD revenues are \$544,918 or 12.14% below the FYTD budget.
- As of May 31, 2025, the Agency's FYTD expenditures are \$39,866 or 0.09% above 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
May 2025

		Current Month			Fiscal Year to Date			
Description	FY25 Total Budget	Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Revenues:								
Passenger Revenue	1,816,893	136,378	151,408	(15,030)	1,648,934	1,665,485	(16,551)	9.2%
Other Revenue	3,078,163	200,180	256,514	(56,334)	2,293,282	2,821,649	(528,367)	25.5%
Total Operating Revenue	4,895,056	336,558	407,921	(71,363)	3,942,217	4,487,135	(544,918)	19.5%
Operating Expenses:								
Operator & Mechanic Salaries & Wages	11,239,225	923,672	936,602	12,930	9,739,546	10,302,623	563,077	13.3%
Operator & Mechanic Overtime	1,241,785	185,558	103,482	(82,076)	1,652,679	1,138,303	(514,376)	-33.1%
Administration Salaries & Wages	7,861,873	700,359	655,156	(45,203)	6,973,118	7,206,717	233,599	11.3%
Administration Overtime	126,561	31,859	10,547	(21,312)	212,066	116,014	(96,052)	-67.6%
Fringe Benefits	11,105,305	899,656	925,442	25,786	9,302,984	10,179,863	876,879	16.2%
Communications	287,782	29,518	23,982	(5,536)	221,441	263,800	42,359	23.1%
Legal Services	687,176	286,799	57,265	(229,534)	1,215,765	629,911	(585,854)	-76.9%
Computer/Network Software Agreement	1,096,582	127,618	91,382	(36,236)	1,021,718	1,005,200	(16,518)	6.8%
Uniforms	99,824	5,644	8,319	2,675	68,616	91,505	22,889	31.3%
Contracted Services	1,647,019	79,920	137,252	57,331	935,382	1,509,767	574,385	43.2%
Equipment Repairs	26,500	335	2,208	1,873	21,049	24,292	3,243	20.6%
Security Services	168,000	12,438	14,000	1,562	134,238	154,000	19,762	20.1%
Fuel - CNG	1,920,006	133,328	160,001	26,672	1,199,838	1,760,006	560,168	37.5%
Fuel - Hydrogen	1,443,827	218,412	120,319	(98,093)	1,935,154	1,323,508	(611,645)	-34.0%
Tires	234,000	36,077	19,500	(16,577)	238,300	214,500	(23,800)	-1.8%
Office Supplies	82,260	6,737	6,855	118	59,896	75,405	15,509	27.2%
Travel/Training	250,200	(10,832)	20,850	31,682	181,524	229,350	47,826	27.4%
Repair Parts	2,008,500	170,745	167,375	(3,370)	1,482,004	1,841,125	359,121	26.2%
Facility Maintenance	87,000	8,508	7,250	(1,258)	57,595	79,750	22,155	33.8%
Electricity - CNG & Hydrogen	1,090,000	62,979	90,833	27,855	547,303	999,167	451,863	49.8%
Natural Gas	2,030,000	92,108	169,167	77,059	1,256,853	1,860,833	603,980	38.1%
Water and Gas	16,000	951	1,333	382	10,194	14,667	4,472	36.3%
Insurance Losses	1,235,000	249,599	102,917	(146,683)	1,845,280	1,132,083	(713,197)	-49.4%
Insurance Premium - Property	200,000	19,055	16,667	(2,388)	212,760	183,333	(29,427)	-6.4%
Repair Claims	100,000	-	8,333	8,333	(600)	91,667	92,267	100.6%
Fuel Taxes	124,500	5,772	10,375	4,603	83,308	114,125	30,817	33.1%
Other Expenses	7,070,699	669,133	589,225	(79,908)	6,755,565	6,481,474	(274,091)	4.5%
Self Consumed Fuel	(4,062,246)	(184,405)	(338,521)	(154,115)	(2,024,447)	(3,723,726)	(1,699,278)	50.2%
Total Operating Expenses (Before Depreciation)	49,417,378	4,761,543	4,118,115	(643,428)	45,339,130	45,299,264	(39,866)	8.3%
Operating Expenses in Excess of Operating Revenue		\$ (4,424,985)			\$ (41,396,913)			
Subsidies:								
Local	8,419,000	836,748	701,583	(135,164)	7,827,997	7,717,417	(110,580)	7.0%
State	30,588,336	3,040,114	2,549,028	(491,086)	28,441,075	28,039,308	(401,767)	7.0%
Federal	5,514,986	548,123	459,582	(88,541)	5,127,842	5,055,404	(72,437)	7.0%
Total Subsidies	44,522,322	4,424,985	3,710,194	(714,791)	41,396,913	40,812,129	(584,784)	7.0%
Net Operating Gain (Loss) After Subsidies	\$ (0)	\$ -			\$ -			

SunLine Transit Agency
Budget Variance Report
May 2025

		Current Month			Fiscal Year to Date			
Description	FY25 Total Budget	Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Expenses:								
Wages & Benefits	31,574,749	2,741,104	2,631,229	(109,875)	27,880,393	28,943,520	1,063,127	11.7%
Services	6,903,050	876,818	575,254	(301,564)	6,482,360	6,327,796	(154,564)	6.1%
Fuels & Lubricants	3,581,133	361,756	298,428	(63,328)	3,247,672	3,282,705	35,033	9.3%
Tires	234,000	36,077	19,500	(16,577)	238,300	214,500	(23,800)	-1.8%
Materials and Supplies	2,608,460	227,318	217,372	(9,947)	1,961,553	2,391,088	429,536	24.8%
Utilities	3,554,000	186,141	296,167	110,026	2,164,882	3,257,833	1,092,952	39.1%
Casualty & Liability	3,678,540	451,909	306,545	(145,364)	4,323,945	3,371,995	(951,950)	-17.5%
Taxes and Fees	124,500	5,772	10,375	4,603	83,308	114,125	30,817	33.1%
Miscellaneous Expenses	1,221,192	59,053	101,766	42,714	981,164	1,119,426	138,262	19.7%
Self Consumed Fuel	(4,062,246)	(184,405)	(338,521)	(154,115)	(2,024,447)	(3,723,726)	(1,699,278)	50.2%
Total Operating Expenses (Before Depreciation)	49,417,378	4,761,543	4,118,115	(643,428)	45,339,130	45,299,264	(39,866)	8.3%
Revenues:								
Passenger Revenue	1,816,893	136,378	151,408	(15,030)	1,648,934	1,665,485	(16,551)	9.2%
Other Revenue	3,078,163	200,180	256,514	(56,334)	2,293,282	2,821,649	(528,367)	25.5%
Total Operating Revenue	4,895,056	336,558	407,921	(71,363)	3,942,217	4,487,135	(544,918)	19.5%
Net Operating Gain (Loss)		\$ (4,424,985)			\$ (41,396,913)			
Subsidies:								
Local	8,419,000	836,748	701,583	(135,164)	7,827,997	7,717,417	(110,580)	7.0%
State	30,588,336	3,040,114	2,549,028	(491,086)	28,441,075	28,039,308	(401,767)	7.0%
Federal	5,514,986	548,123	459,582	(88,541)	5,127,842	5,055,404	(72,437)	7.0%
Total Subsidies	44,522,322	4,424,985	3,710,194	(714,791)	41,396,913	40,812,129	(584,784)	7.0%
Net Operating Gain (Loss) After Subsidies	\$ (0)	\$ -			\$ -			

Budget Variance Analysis - SunLine Transit Agency

Passenger Revenue

- Passenger fare revenues are within an acceptable range of the budget.
- As of May, ridership was at 4.5% above FY24 FYTD totals.
- Total system ridership was 113,366 trips above FY24 FYTD amounts.

Ridership

	FY24-May	FY25-May	Variance	%Δ
Fixed Route	237,916	233,464	(4,452)	-1.9%
Paratransit	10,347	9,463	(884)	-8.5%
SunRide	2,152	1,878	(274)	-12.7%
System Total	250,415	244,805	(5,610)	-2.2%

Ridership

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Fixed Route	2,388,088	2,506,497	118,409	5.0%
Paratransit	110,460	102,685	(7,775)	-7.0%
SunRide	20,648	23,380	2,732	13.2%
System Total	2,519,196	2,632,562	113,366	4.5%

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

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

Self-Consumed Fuel

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

SunLine Transit Agency
CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Contracts Signed between \$25,000 and \$250,000 for May 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 four (4) purchase orders executed in May 2025 between \$25,000 and \$250,000:

Vendor	Purpose	Amount
Trapeze	Software Renewal	\$30,926.00
Trapeze	Software Renewal	\$27,351.48
Trapeze	Software Renewal	\$45,638.55
Johnson Equipment	Cradlepoint Antennas	\$75,835.37

Recommendation:

Approve.

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

Vendor	Product/Service	Need	Budgeted	Budgeted Amount	Cost	Type
Trapeze	Software Renewal	Dispatch Software	FY26	\$30,926.00	\$30,926.00	Purchase Order
Trapeze	Software Renewal	Data Collection S/W	FY26	\$27,351.48	\$27,351.48	Purchase Order
Trapeze	Software Renewal	Schedule Planning	FY26	\$45,638.55	\$45,638.55	Purchase Order
Johnson Equipment	Equipment	Cradlepoint Antennas	FY25	\$97,840.82	\$75,835.37	Purchase Order

SunLine Transit Agency

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Union & Non-Union Pension Investment Asset Summary
for May 2025

Summary:

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

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

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

Union

Asset Class		Actual	Range
Growth Assets			
	Domestic Equity	28.6%	16% – 56%
	International Equity	17.1%	0% - 39%
	Other	7.7%	0% – 20%
Income Assets			
	Fixed Income	41.0%	25% - 65%
	Other	4.6%	0% – 20%
Real Return Assets		0.0%	0% – 20%

Cash Equivalents	1.0%	0% – 20%
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Non-Union

Asset Class		Actual	Range
Growth Assets			
	Domestic Equity	28.6%	16% – 56%
	International Equity	17.2%	0% - 39%
	Other	7.6%	0% – 20%
Income Assets			
	Fixed Income	40.8%	25% - 65%
	Other	4.6%	0% – 20%
Real Return Assets		0.0%	0% – 20%
Cash Equivalents		1.2%	0% – 20%

Components may not sum to 100.0% due to rounding.

For the month of May, the market value of assets increased by \$1,028,839 and \$1,043,946 for the union and non-union plans, respectively.

Month to Month Asset Comparison

Month	Market Value - Union	Market Value – Non-Union
April 2025	\$43,558,801	\$43,773,845
May 2025	\$44,587,640	\$44,817,791
Increase (Decrease)	\$1,028,839	\$1,043,946

Recommendation:

Approve.

Portfolio Summary and Statistics

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

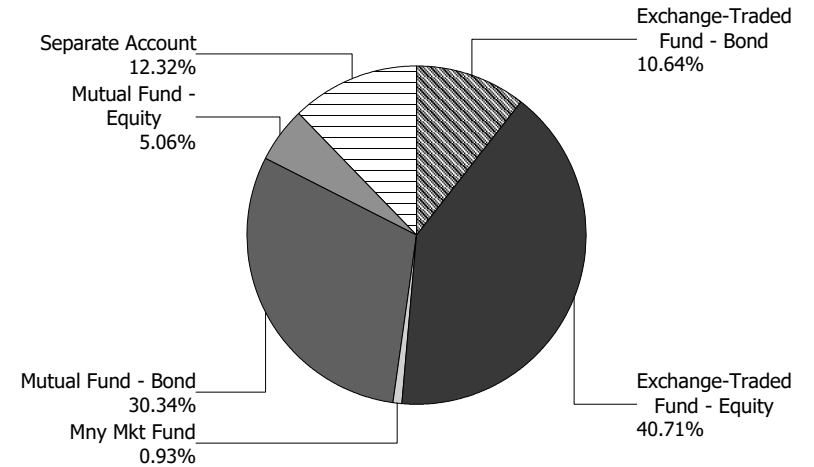
SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Account Summary

Description	Par Value	Market Value	Percent
Separate Account	4,314,476.35	5,491,828.16	12.32
Mutual Fund - Equity	84,007.27	2,254,345.61	5.06
Mutual Fund - Bond	1,344,697.79	13,529,133.42	30.34
Money Market Mutual Fund	413,530.12	413,530.12	0.93
Exchange-Traded Fund - Equity	613,260.00	18,155,569.68	40.71
Exchange-Traded Fund - Bond	48,351.00	4,743,233.10	10.64
Managed Account Sub-Total	6,818,322.53	44,587,640.09	100.00%
Accrued Interest		0.00	
Total Portfolio	6,818,322.53	44,587,640.09	

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

Sector Allocation



Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Exchange-Traded Fund - Bond									
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,446.00	92.76	597,930.32	98.10	632,352.60	34,422.28	1.41
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,159.00	97.77	699,934.71	98.10	702,297.90	2,363.19	1.58
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,165.00	97.84	701,023.60	98.10	702,886.50	1,862.90	1.58
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,307.00	96.40	318,794.80	98.10	324,416.70	5,621.90	0.73
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	98.10	397,206.90	(3,117.73)	0.89
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,322.00	99.12	329,276.64	98.10	325,888.20	(3,388.44)	0.73
ISHARES CORE U.S. AGGREGATE	464287226	8278395	16,903.00	98.64	1,667,311.92	98.10	1,658,184.30	(9,127.62)	3.72

Security Type Sub-Total			48,351.00		4,714,596.62	686.70	4,743,233.10	28,636.48	10.64
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Exchange-Traded Fund - Equity									
SCHWAB US LARGE-CAP ETF	808524201	17333747	39,046.00	22.81	890,639.26	23.30	909,771.80	19,132.54	2.04
SCHWAB US LARGE-CAP ETF	808524201	17333747	480,606.00	22.54	10,834,461.26	23.30	11,198,119.80	363,658.54	25.11
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	19,229.00	52.35	1,006,634.30	55.58	1,068,747.82	62,113.52	2.40
VANGUARD TOTAL INTL STOCK	921909768	23836382	6,003.00	61.64	370,024.92	66.94	401,840.82	31,815.90	0.90
VANGUARD TOTAL INTL STOCK	921909768	23836382	46,985.00	63.70	2,992,944.50	66.94	3,145,175.90	152,231.40	7.05
VANGUARD TOTAL INTL STOCK	921909768	23836382	3,480.00	52.06	181,168.80	66.94	232,951.20	51,782.40	0.52
VANGUARD TOTAL INTL STOCK	921909768	23836382	8,030.00	47.86	384,314.20	66.94	537,528.20	153,214.00	1.21
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.19	145,307.34	66.94	173,106.84	27,799.50	0.39
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,875.00	51.81	148,953.46	66.94	192,452.50	43,499.04	0.43
VANGUARD TOTAL INTL STOCK	921909768	23836382	1,834.00	54.44	99,842.96	66.94	122,767.96	22,925.00	0.28
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.52	146,160.72	66.94	173,106.84	26,946.12	0.39

Security Type Sub-Total			613,260.00		17,200,451.72	637.70	18,155,569.68	955,117.96	40.72
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Money Market Mutual Fund									
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	413,530.12	1.00	413,530.12	100.00	413,530.12	0.00	0.93

Security Type Sub-Total			413,530.12		413,530.12	100.00	413,530.12	0.00	0.93
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Mutual Fund - Bond									
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Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Mutual Fund - Bond									
BAIRD CORE PLUS BOND-INST	057071870	7001692	496,641.54	10.77	5,348,092.81	10.09	5,011,113.17	(336,979.64)	11.24
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.46	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	323,973.99	9.15	2,964,364.50	9.06	2,935,204.31	(29,160.19)	6.58
PGIM TOTAL RETURN BOND-R6	74440B884	168981	322,677.84	13.17	4,250,171.94	11.89	3,836,639.55	(413,532.39)	8.60
VOYA INTERMEDIATE BOND-R6	92913L569	IIBZX	201,404.39	9.59	1,930,732.09	8.67	1,746,176.03	(184,556.06)	3.92
Security Type Sub-Total			1,344,697.79		14,493,361.69	50.17	13,529,133.42	(964,228.27)	30.34
Mutual Fund - Equity									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,629.50	28.07	270,300.00	27.83	267,988.92	(2,311.08)	0.60
GLDMN SCHS GQG PRT INTL-R6	38147N269	GSIX	36,878.77	19.34	713,335.27	22.26	820,921.42	107,586.15	1.84
HRDNG LVNR INTL EQTY-INST	412295107	175052	19,680.08	28.64	563,700.77	27.70	545,138.19	(18,562.58)	1.22
HRTFRD SCHR EM MRKT EQ-SDR	41665H789	10575468	12,957.31	15.22	197,181.37	17.92	232,195.08	35,013.71	0.52
UNDISC MGRS BEHAV VAL-R6	904504479	1428076	4,861.61	87.23	424,087.81	79.83	388,102.00	(35,985.81)	0.87
Security Type Sub-Total			84,007.27		2,168,605.22	175.54	2,254,345.61	85,740.39	5.05
Separate Account									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,000.00	1.00	49,000.00	114.70	56,205.13	7,205.13	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,000.00	1.00	49,000.00	114.70	56,205.13	7,205.13	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	16,876.11	1.00	16,876.11	114.70	19,357.63	2,481.52	0.04
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12

Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Separate Account									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,980.00	1.00	49,980.00	114.70	57,329.23	7,349.23	0.13
BLACKSTONE INFRASTRUCTURE PRTNRS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE63	SA495	900,000.00	1.00	900,000.00	110.16	991,426.00	91,426.00	2.22
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	180,000.00	1.00	180,000.00	126.42	227,551.88	47,551.88	0.51
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	1,101,466.00	1.00	1,101,466.00	126.42	1,392,448.12	290,982.12	3.12
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	80,433.93	1.00	80,433.93	139.61	112,294.15	31,860.22	0.25
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	147,000.00	1.00	147,000.00	139.61	205,227.32	58,227.32	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	309,750.00	1.00	309,750.00	139.61	432,443.29	122,693.29	0.97
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	204,378.01	1.00	204,378.01	139.61	285,333.00	80,954.99	0.64
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	145,309.38	1.00	145,309.38	139.61	202,867.04	57,557.66	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	127,930.57	1.00	127,930.57	139.61	178,604.41	50,673.84	0.40
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	130,837.59	1.00	130,837.59	139.61	182,662.91	51,825.32	0.41
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	252,000.00	1.00	252,000.00	139.61	351,818.27	99,818.27	0.79
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	180,319.43	1.00	180,319.43	139.61	251,744.72	71,425.29	0.56
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	105,000.00	1.00	105,000.00	139.61	146,590.94	41,590.94	0.33

Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]											
Security Type/Description			CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Dated Date/Coupon/Maturity											
Separate Account											
NB SOF V			NBSOFV007	F_NBF	58,570.33	1.00	58,570.33	139.61	81,770.29	23,199.96	0.18
DTD 01/01/2010 0.000% --											
Security Type Sub-Total					4,314,476.35		4,314,476.35	2,931.05	5,491,828.16	1,177,351.81	12.33
Managed Account Sub-Total					6,818,322.53		43,305,021.72	4,581.16	44,587,640.09	1,282,618.37	100.01
Securities Sub-Total					\$6,818,322.53		\$43,305,021.72	\$4,581.16	\$44,587,640.09	\$1,282,618.37	100.01%
Accrued Interest									\$0.00		
Total Investments									\$44,587,640.09		

Portfolio Summary and Statistics

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

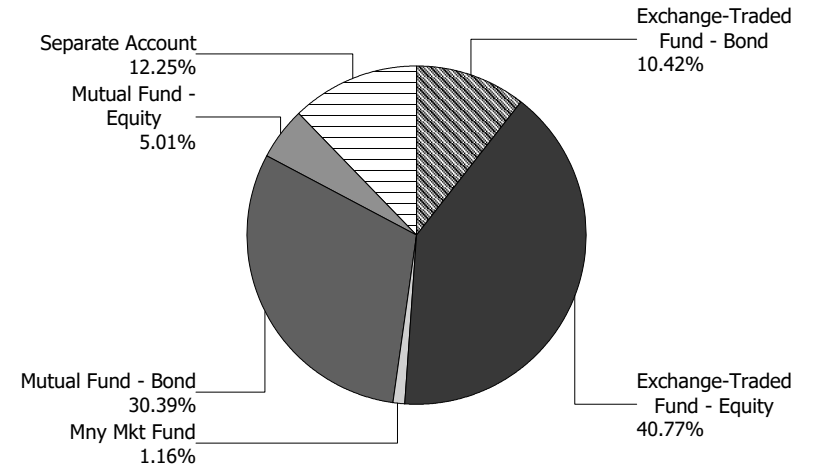
SUNLINE EMPLOYEES RETIREMENT NON-BARGAI

Account Summary

Description	Par Value	Market Value	Percent
Separate Account	4,314,476.35	5,491,828.05	12.25
Mutual Fund - Equity	83,727.30	2,244,643.07	5.01
Mutual Fund - Bond	1,353,351.84	13,621,279.85	30.39
Money Market Mutual Fund	521,526.09	521,526.09	1.16
Exchange-Traded Fund - Equity	616,500.00	18,270,719.84	40.77
Exchange-Traded Fund - Bond	47,582.00	4,667,794.20	10.42
Managed Account Sub-Total	6,937,163.58	44,817,791.10	100.00%
Accrued Interest		0.00	
Total Portfolio	6,937,163.58	44,817,791.10	

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

Sector Allocation



Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Exchange-Traded Fund - Bond									
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,317.00	96.40	319,758.80	98.10	325,397.70	5,638.90	0.73
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,146.00	97.84	699,164.64	98.10	701,022.60	1,857.96	1.55
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	98.10	397,206.90	(3,117.73)	0.89
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,372.00	99.12	334,232.64	98.10	330,793.20	(3,439.44)	0.74
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,272.00	92.76	581,790.09	98.10	615,283.20	33,493.11	1.37
ISHARES CORE U.S. AGGREGATE	464287226	8278395	17,290.00	98.64	1,705,485.60	98.10	1,696,149.00	(9,336.60)	3.78
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,136.00	97.77	599,916.11	98.10	601,941.60	2,025.49	1.34
Security Type Sub-Total			47,582.00		4,640,672.51	686.70	4,667,794.20	27,121.69	10.40
Exchange-Traded Fund - Equity									
SCHWAB US LARGE-CAP ETF	808524201	17333747	479,098.00	22.54	10,800,465.91	23.30	11,162,983.40	362,517.49	24.91
SCHWAB US LARGE-CAP ETF	808524201	17333747	43,384.00	22.81	989,589.04	23.30	1,010,847.20	21,258.16	2.26
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	17,313.00	52.35	906,332.09	55.58	962,256.54	55,924.45	2.15
VANGUARD TOTAL INTL STOCK	921909768	23836382	3,770.00	52.06	196,266.20	66.94	252,363.80	56,097.60	0.56
VANGUARD TOTAL INTL STOCK	921909768	23836382	46,985.00	63.70	2,992,944.50	66.94	3,145,175.90	152,231.40	7.02
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,470.00	56.52	139,604.40	66.94	165,341.80	25,737.40	0.37
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,875.00	51.81	148,953.46	66.94	192,452.50	43,499.04	0.43
VANGUARD TOTAL INTL STOCK	921909768	23836382	1,375.00	54.44	74,855.00	66.94	92,042.50	17,187.50	0.21
VANGUARD TOTAL INTL STOCK	921909768	23836382	6,003.00	61.64	370,024.92	66.94	401,840.82	31,815.90	0.90
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,469.00	56.19	138,733.11	66.94	165,274.86	26,541.75	0.37
VANGUARD TOTAL INTL STOCK	921909768	23836382	10,758.00	47.86	514,875.73	66.94	720,140.52	205,264.79	1.61
Security Type Sub-Total			616,500.00		17,272,644.36	637.70	18,270,719.84	998,075.48	40.79
Money Market Mutual Fund									
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	521,526.09	1.00	521,526.09	100.00	521,526.09	0.00	1.16
Security Type Sub-Total			521,526.09		521,526.09	100.00	521,526.09	0.00	1.16
Mutual Fund - Bond									

Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Mutual Fund - Bond									
BAIRD CORE PLUS BOND-INST	057071870	7001692	500,093.97	10.74	5,371,076.00	10.09	5,045,948.12	(325,127.88)	11.26
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.46	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	323,973.99	9.15	2,964,364.50	9.06	2,935,204.31	(29,160.19)	6.55
PGIM TOTAL RETURN BOND-R6	74440B884	168981	326,470.85	13.15	4,292,121.75	11.89	3,881,738.32	(410,383.43)	8.66
VOYA INTERMEDIATE BOND-R6	92913L569	IIBZX	202,813.00	9.59	1,945,881.55	8.67	1,758,388.74	(187,492.81)	3.92
Security Type Sub-Total			1,353,351.84		14,573,444.15	50.17	13,621,279.85	(952,164.30)	30.39
Mutual Fund - Equity									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,529.75	28.07	267,500.00	27.83	265,212.86	(2,287.14)	0.59
GLDMN SCHS GQG PRT INTL-R6	38147N269	GSIX	36,819.12	19.34	712,235.01	22.26	819,593.62	107,358.61	1.83
HRDNG LVNR INTL EQTY-INST	412295107	175052	19,647.37	28.63	562,530.78	27.70	544,232.15	(18,298.63)	1.21
HRTFRD SCHR EM MRKT EQ-SDR	41665H789	10575468	12,919.82	15.22	196,610.96	17.92	231,523.25	34,912.29	0.52
UNDISC MGRS BEHAV VAL-R6	904504479	1428076	4,811.24	87.23	419,694.20	79.83	384,081.19	(35,613.01)	0.86
Security Type Sub-Total			83,727.30		2,158,570.95	175.54	2,244,643.07	86,072.12	5.01
Separate Account									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	114.70	56,205.11	7,205.11	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,980.00	1.00	49,980.00	114.70	57,329.21	7,349.21	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	16,876.11	1.00	16,876.11	114.70	19,357.63	2,481.52	0.04

Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Separate Account									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	114.70	56,205.11	7,205.11	0.13
BLACKSTONE INFRASTRUCTURE PRTNRS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE64	SA496	900,000.00	1.00	900,000.00	110.16	991,426.00	91,426.00	2.21
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	1,101,466.00	1.00	1,101,466.00	126.42	1,392,448.12	290,982.12	3.11
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	180,000.00	1.00	180,000.00	126.42	227,551.88	47,551.88	0.51
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	204,378.01	1.00	204,378.01	139.61	285,333.00	80,954.99	0.64
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	145,309.38	1.00	145,309.38	139.61	202,867.04	57,557.66	0.45
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	309,750.00	1.00	309,750.00	139.61	432,443.29	122,693.29	0.96
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	147,000.00	1.00	147,000.00	139.61	205,227.32	58,227.32	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	130,837.59	1.00	130,837.59	139.61	182,662.91	51,825.32	0.41
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	127,930.57	1.00	127,930.57	139.61	178,604.41	50,673.84	0.40
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	180,319.43	1.00	180,319.43	139.61	251,744.72	71,425.29	0.56
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	252,000.00	1.00	252,000.00	139.61	351,818.27	99,818.27	0.79
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	105,000.00	1.00	105,000.00	139.61	146,590.94	41,590.94	0.33
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	80,433.93	1.00	80,433.93	139.61	112,294.15	31,860.22	0.25

Detail of Securities Held & Market Analytics

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

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]											
Security Type/Description			CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
Dated Date/Coupon/Maturity											
Separate Account											
NB SOF V			NBSOFV008	F_NBF	58,570.33	1.00	58,570.33	139.61	81,770.29	23,199.96	0.18
DTD 01/01/2010 0.000% --											
Security Type Sub-Total					4,314,476.35		4,314,476.35	2,931.05	5,491,828.05	1,177,351.70	12.29
Managed Account Sub-Total					6,937,163.58		43,481,334.41	4,581.16	44,817,791.10	1,336,456.69	100.04
Securities Sub-Total					\$6,937,163.58		\$43,481,334.41	\$4,581.16	\$44,817,791.10	\$1,336,456.69	100.04%
Accrued Interest									\$0.00		
Total Investments									\$44,817,791.10		

SunLine Transit Agency

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Ridership Report for May 2025

Summary:

Monthly Ridership			Monthly Variance	
	May-25	May-24	Net	Percent
Fixed Route	233,464	237,916	(4,452)	(1.9%)
SunRide	1,878	2,152	(274)	(12.7%)
Taxi Voucher*	109	97	12	12.4%
SunDial	9,463	10,347	(884)	(8.5%)
Total	244,914	250,512	(5,598)	(2.2%)

Note: May 2025 ridership decreased compared to May 2024 due to one less weekday (22 vs. 23). Additionally, May 2025 was about 2°F warmer on average, with higher daytime and nighttime temperatures potentially contributing to reduced transit use. Average daily ridership in May 2025 was 8,301 on weekdays and 5,648 on weekends.

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

Yearly Ridership	
Fiscal Year 2025	2,634,141
Fiscal Year 2024	2,521,047
Ridership Increase	113,094

Fiscal year to date system ridership increased by 113,094 rides or 4.49% compared to the previous fiscal year. The baseline of the attached COVID-19 Recovery chart is calendar year 2020, this allows a comparison of three (3) years.

Recommendation:

Approve.

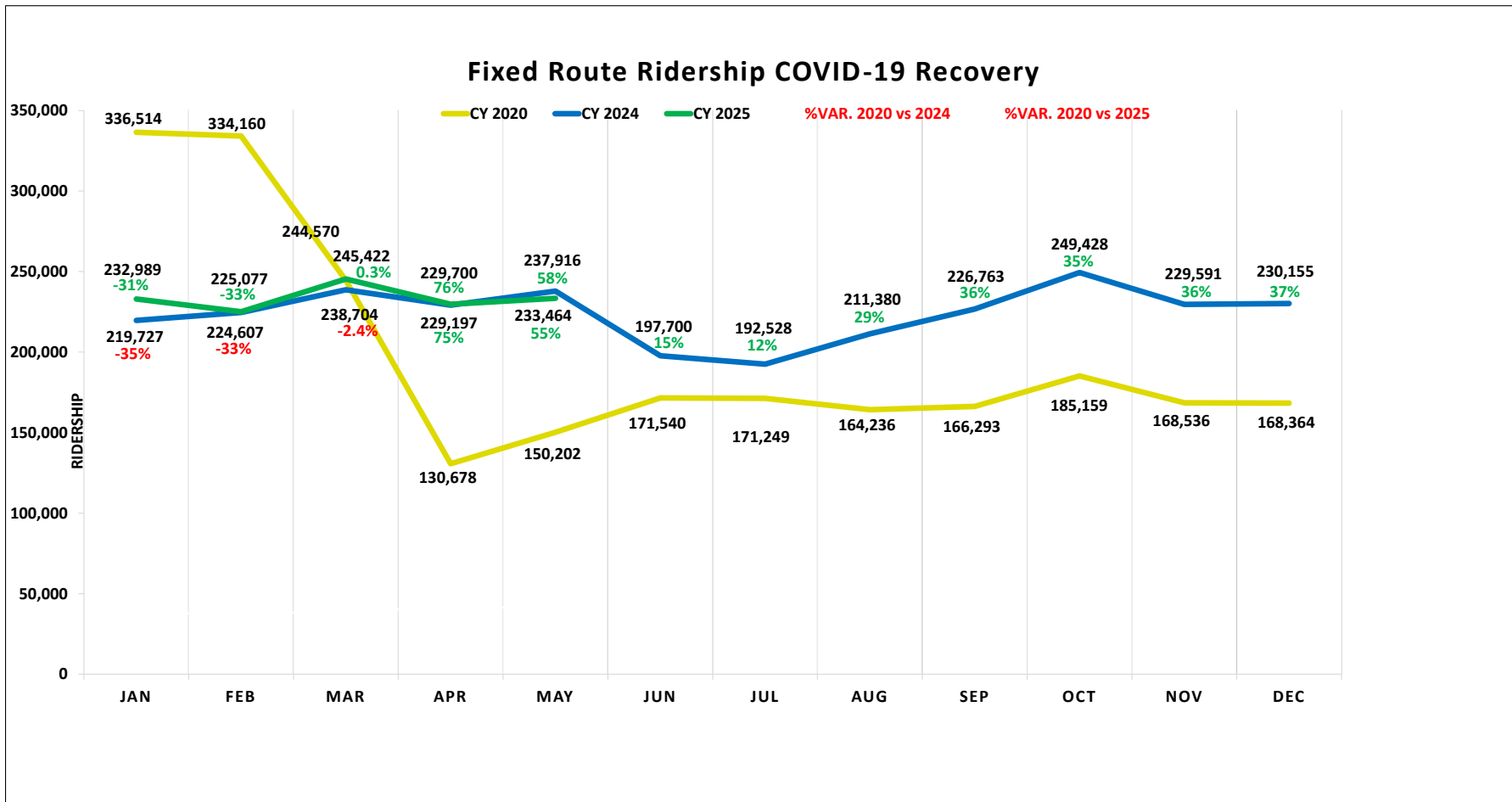


SunLine Transit Agency Monthly Ridership Report May 2025

Fixed Route		May 2025	May 2024	FY 2025 YTD	FY 2024 YTD	Monthly KPI		Bikes		Wheelchairs	
						Passengers/ Rev. Hours	Passengers/ Rev. Miles	Monthly	FYTD	Monthly	FYTD
Route 1EV	Coachella - Hwy 111 - Palm Desert Mall	47,672	52,257	545,865	545,742	20.0	1.6	1,759	20,496	240	2,902
Route 1WV	Palm Springs - Hwy 111 - Palm Desert Mall	40,077	37,412	423,825	410,592	15.8	1.3	1,168	14,003	287	3,393
Route 2	Desert Hot Springs - Palm Springs - Cathedral City	63,131	66,810	704,525	667,073	18.6	1.4	1,709	18,926	543	5,636
Route 3	Desert Hot Springs - Desert Edge	8,070	9,397	85,683	80,255	10.1	0.6	284	3,024	74	999
Route 4	Westfield Palm Desert - Palm Springs	20,678	19,889	220,385	205,631	11.5	0.8	587	6,090	122	1,339
Route 5	Desert Hot Springs - CSUSB - Palm Desert	2,773	2,966	29,836	20,660	5.8	0.3	81	907	16	184
Route 6	Coachella - Fred Waring - Westfield Palm Desert	5,077	4,490	51,964	36,288	9.0	0.7	122	1,663	42	338
Route 7	Bermuda Dunes - Indian Wells - La Quinta	7,996	8,249	85,314	84,842	9.8	0.7	325	3,779	13	201
Route 8	North Indio - Coachella -Thermal/Mecca	17,795	18,583	180,623	172,746	10.9	0.7	503	5,140	105	923
Route 9	North Shore - Mecca - Oasis	7,709	6,187	53,944	52,374	8.6	0.4	93	842	39	156
Route 10	Indio - CSUSB - San Bernardino - Metrolink	2,363	2,600	36,216	32,917	19.2	0.2	24	2,101	12	357
Route 200 SB	Palm Springs High School AM Tripper	246	147	1,822	1,791	14.5	0.7	1	7	-	1
Route 500 SB	Westfield Palm Desert PM Tripper	295	522	1,683	3,484	10.0	1.5	-	3	-	-
Route 700 SB/NB	Harris / Washington - Calle Madrid / Ave Vallejo AM Tripper	314	269	2,966	3,277	14.6	0.9	5	11	-	-
Route 701 SB/NB	Harris / Washington - Calle Madrid / Ave Vallejo PM Tripper	1,635	998	10,035	8,367	114.2	7.5	1	23	1	8
Route 800 NB	Shadow Hills High School AM Tripper	4,148	3,505	37,217	21,198	225.6	11.1	-	7	-	12
Route 801 SB	Jackson / 44th PM Tripper	3,094	2,325	29,084	23,614	176.3	10.4	-	19	5	13
Route 802 SB	Hwy 111 / Golf Center Pkwy PM Tripper	88	395	2,245	4,525	13.1	0.7	-	-	-	2
Route 803 NB	Shadow Hills High School AM Tripper	303	915	3,266	12,711	24.5	1.2	-	-	-	-
Fixed Route Total		233,464	237,916	2,506,497	2,388,088		1.0	6,662	77,041	1,499	16,464
SunRide		1,878	2,152	23,380	20,648						
Taxi Voucher		109	97	1,579	1,851						
SunDial		9,463	10,347	102,685	110,460	1.9	0.1				
System Total		244,914	250,512	2,634,141	2,521,047	10.7	0.8				
		May-25	May-24								
Weekdays:		22	23								
Saturdays:		5	4								
Sundays:		4	4								
Total Days:		31	31								

Haul Pass COD contributed with 7,163 rides, CSUSB with 1,314 rides.

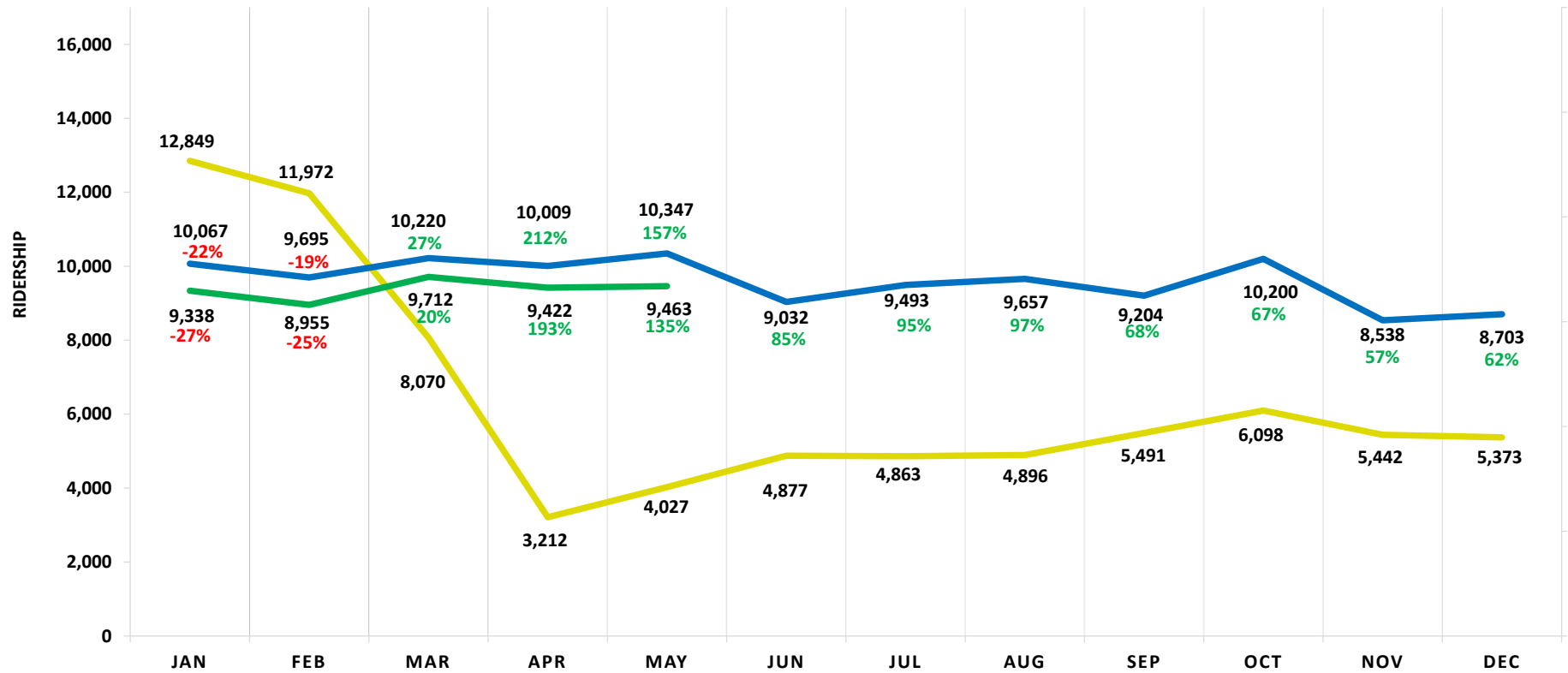
Mobile Ticketing contributed with 50,590 rides, the total for May 2025 includes 116 paratransit mobile tickets.



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

Paratransit Ridership COVID-19 Recovery

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



The COVID-19 pandemic caused a major national and global disruption with closures of businesses, schools and entertainment venues due to the implementation of national and statewide public health policies. Variances are in red close to their corresponding ridership number. 2024 and 2025 are referring to the baseline of 2020.

CY 2020 will remain on the chart since it is the baseline needed to compare ridership recovery for CY 2024 & CY 2025. CY 2021 - CY 2023 have been removed to reflect the two (2) most recent years in recovery.

SunLine Transit Agency**CONSENT CALENDAR**

DATE: July 23, 2025

APPROVETO: Finance/Audit Committee
Board of Directors

RE: Acceptance of SunDial Operational Notes for May 2025

Summary:

Due to ongoing bus technology upgrades, on-time performance (OTP) reporting will be temporarily paused to ensure data accuracy during system testing and calibration. Reporting will resume once the new system is fully implemented and validated.

The total number of passengers for the month of May 2025 where 9,463, which is a decrease of 884 passengers or 8.5% when compared to May 2024. Mobility device boardings for May 2025 decreased by 209 or 16.1% when compared to May 2024. During this month, the field supervisors conducted a total of 69 onboard inspections and 60 safety evaluations, which included pre-trip inspections and trailing evaluations. The supervisors have exceeded their monthly on-board evaluations goal of 60 by 9, which is a decrease of 23.3% when compared to May 2024. Similarly, while they met the safety evaluation goal of 60, this reflects a 42.3% decline from May 2024.

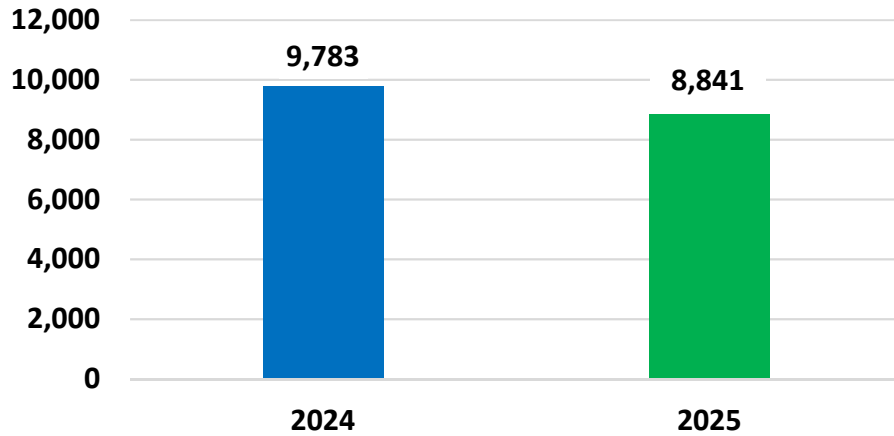
Recommendation:

Approve.

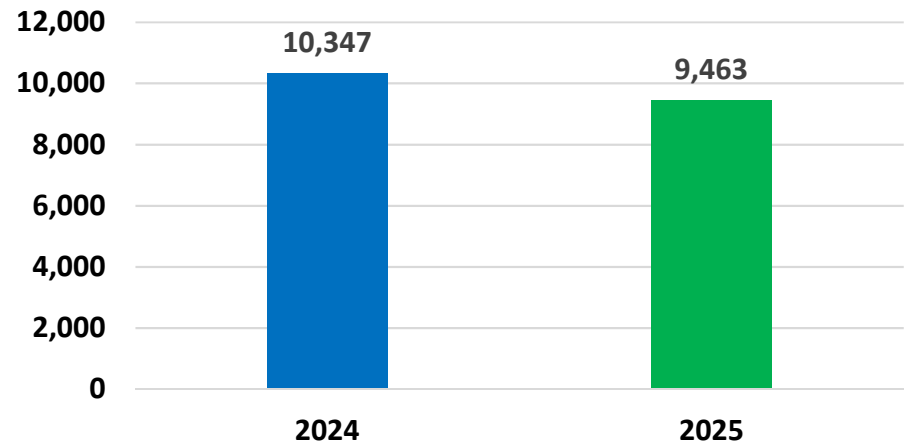
Paratransit Operational Charts

May 2024 vs. May 2025

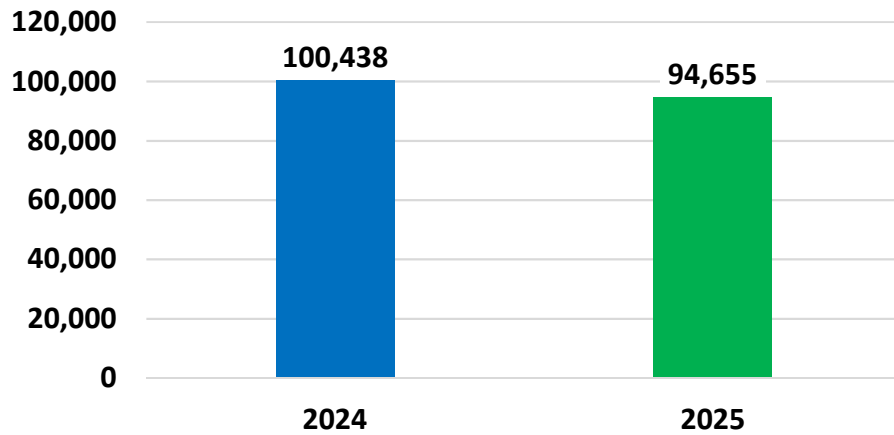
Total Trips



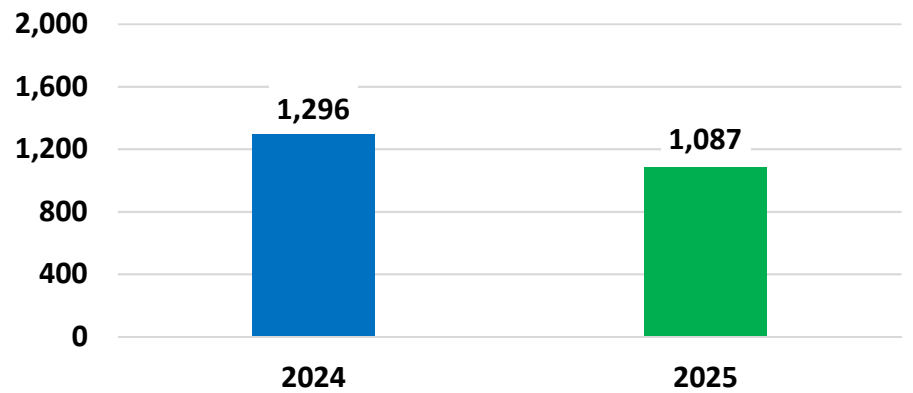
Total Passengers



Total Miles

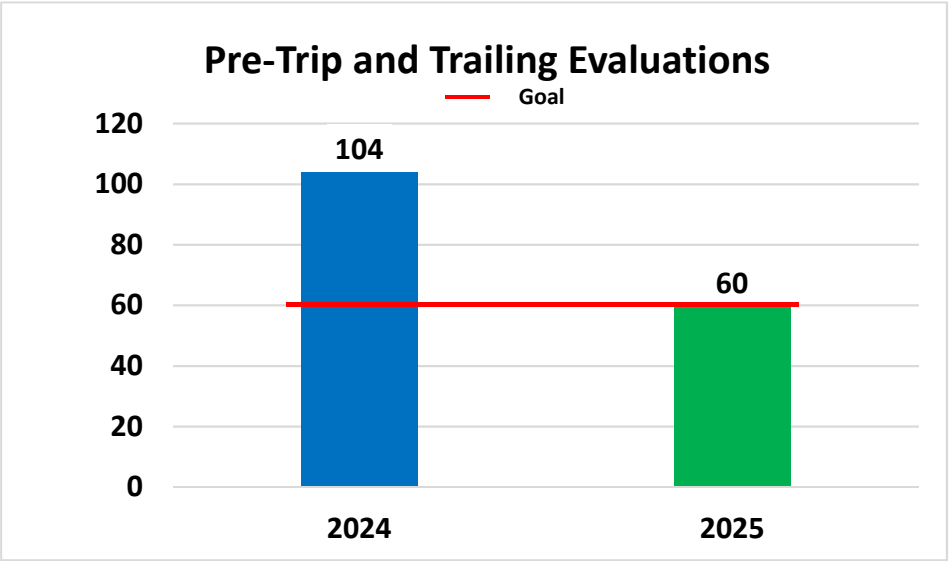
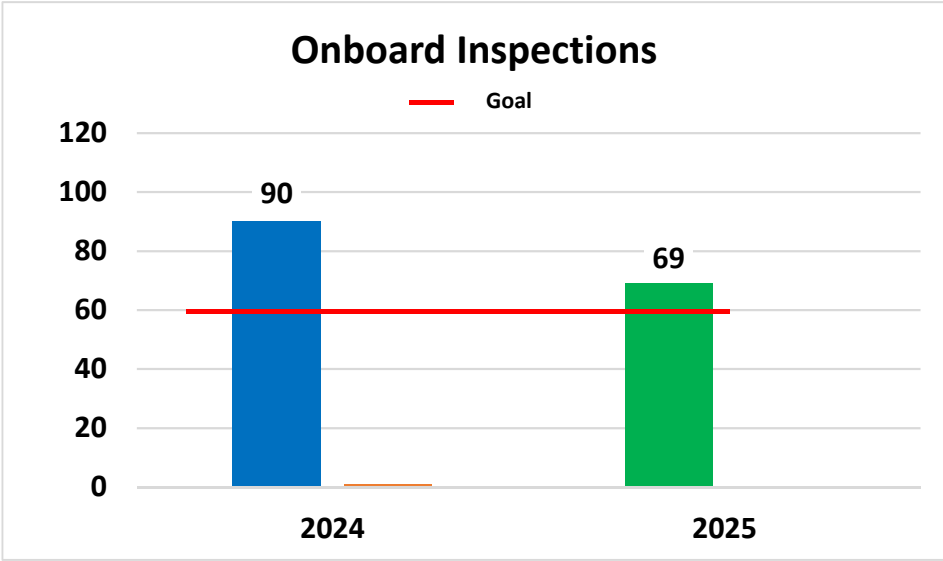


Mobility Device Boardings



Paratransit Operational Charts

May 2024 vs. May 2025



SunLine Transit Agency
CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
 Board of Directors

RE: Acceptance of Metrics for May 2025

Summary:

The metrics packet includes data highlighting operator absences, fixed route customer complaints, paratransit customer complaints and advertising revenue. SunRide performance includes system-wide metrics, trip booking method and geo-fence metrics for Desert Hot Springs/Desert Edge, Palm Desert, Coachella, Mecca/North Shore, Indio, Cathedral City, La Quinta and Palm Springs. 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

May Ridership Highlights:

- Total Ridership: 1,878 passengers – increase of 8% in ridership compared to 1,739 passengers in April 2025.
- Cathedral City: 118 passengers – increase of 3% in ridership compared to 115 passengers in April 2025.
- Coachella: 127 passengers – decrease of 2% in ridership compared to 129 passengers in April 2025 (due to seat availability).
- Desert Hot Springs/Desert Edge: 122 passengers – increase of 18% in ridership compared to 95 passengers in April 2025.
- Indio: 645 passengers – increase of 8% in ridership compared to 595 passengers in April 2025.
- La Quinta: 26 passengers – increase of 26% in ridership compared to 19 passengers in April 2025.
- Mecca/North Shore: 71 passengers – increase of 32% in ridership compared to 48 passengers in April 2025.
- Palm Desert: 613 passengers – increase of 2% in ridership compared to 599 passengers in April 2025.

- Palm Springs: 156 passengers – increase of 12% in ridership compared to 139 passengers in April 2025.

Fixed Route

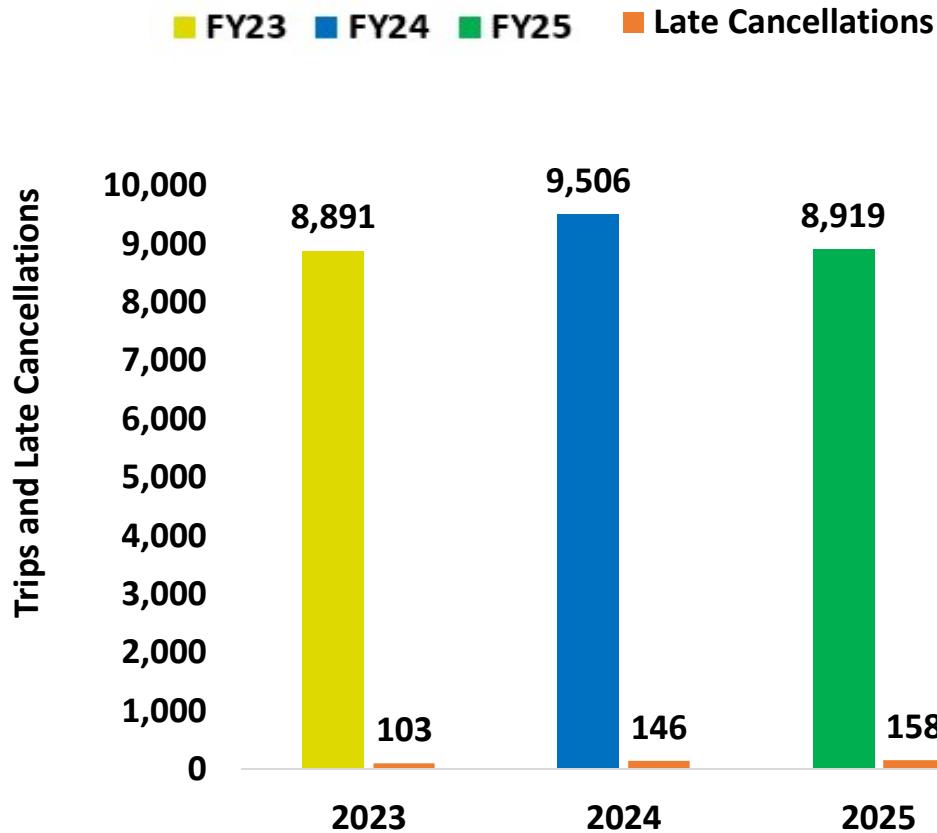
Due to ongoing bus technology upgrades, on-time performance (OTP) reporting will be temporarily paused to ensure data accuracy during system testing and calibration. Reporting will resume once the new system is fully implemented and validated.

- For May 2025, 18% of fixed route operator workforce was absent when compared to May 2024 at 16%.
- For May 2025, the fixed route operator workforce had 134 operators, compared to 144 operators in May 2024.

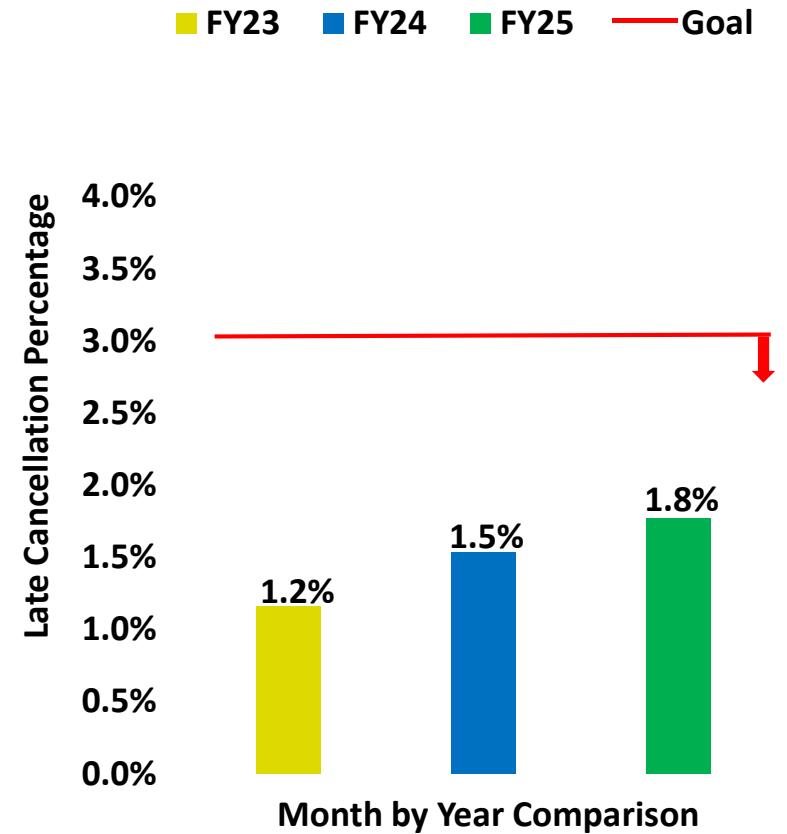
Recommendation:

Approve.

Paratransit Total Trips vs. Late Cancellations May



Late Cancellations by Percentage

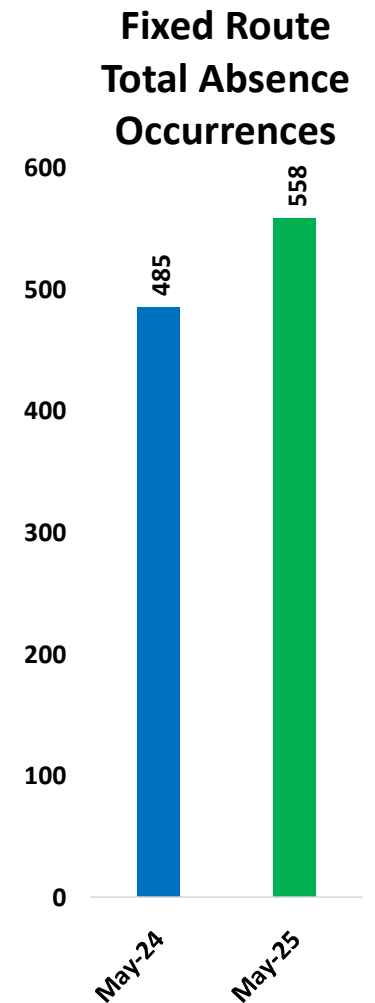
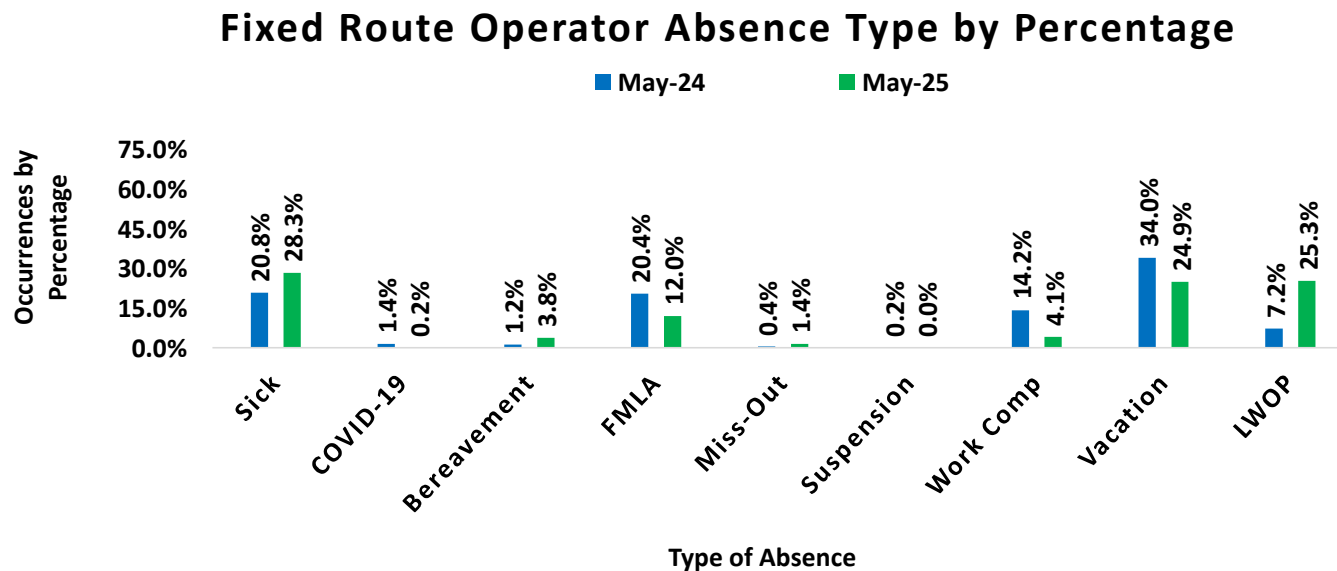
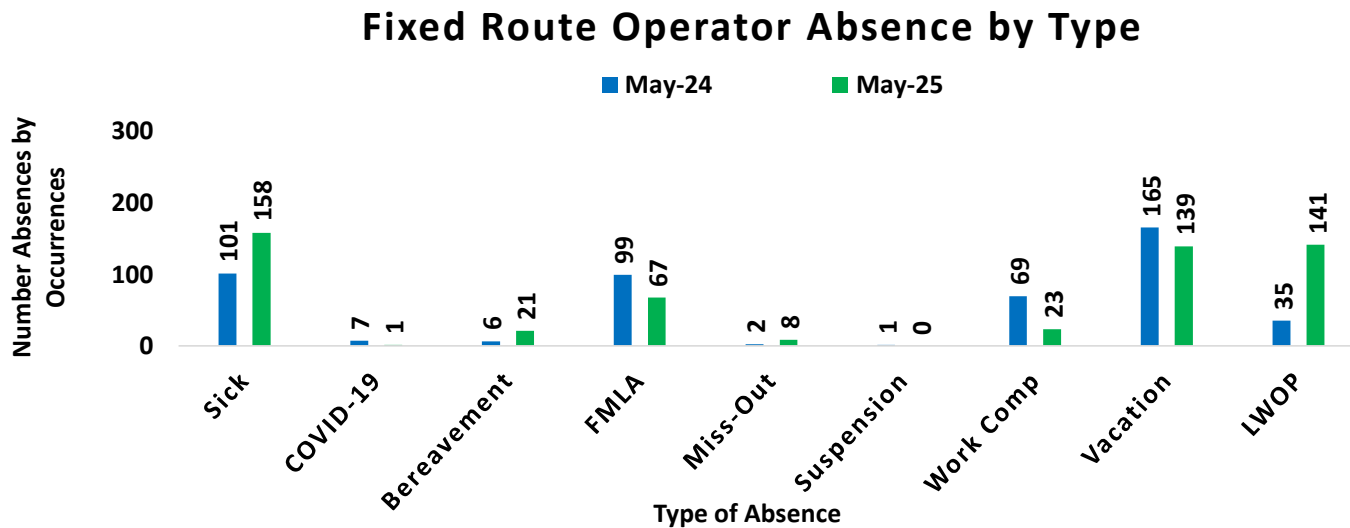


Trip: A one-way trip booked by the rider. A round trip is counted as two (2) trips.

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.

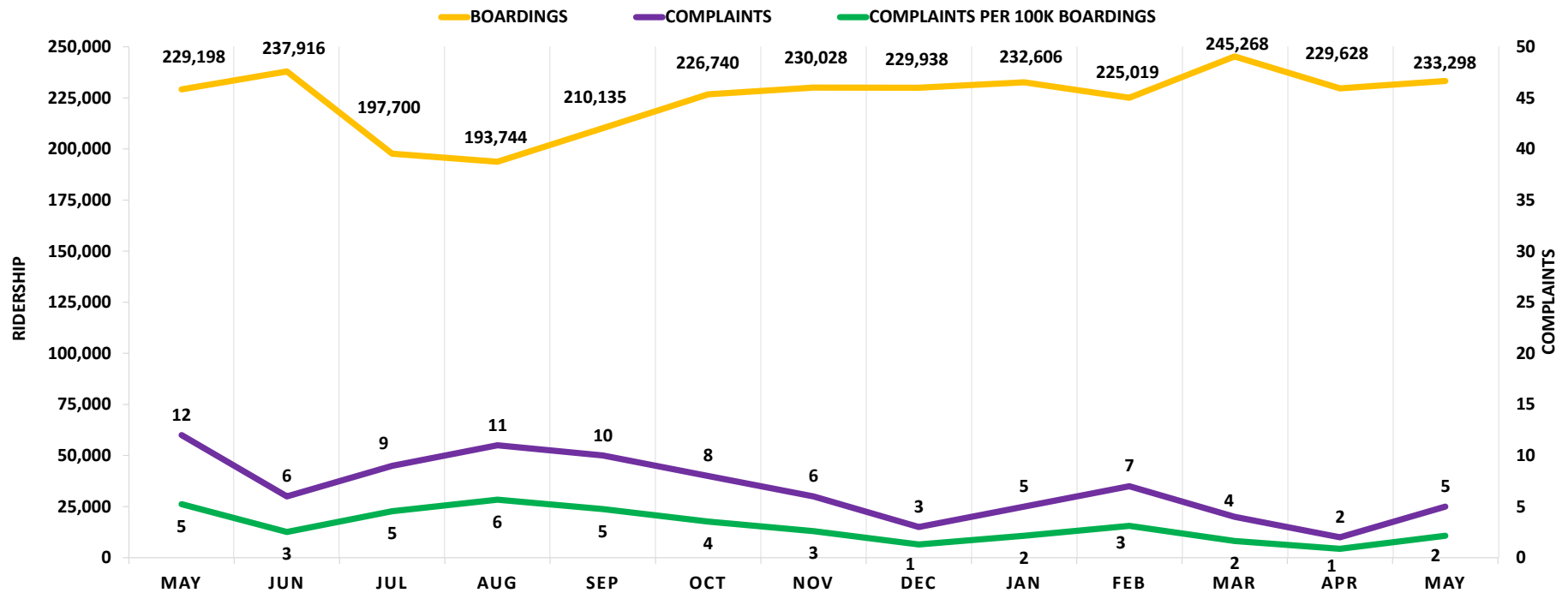


This chart includes unplanned/unscheduled and COVID-19 absences for Fixed Route drivers.

For the month of May 2025, 18% of SunLine's fixed route operator workforce was absent when compared to May 2024 at 16%.

For the month of May 2025, workforce was at a total of 134 operators when compared to May 2024 at 144 operators.

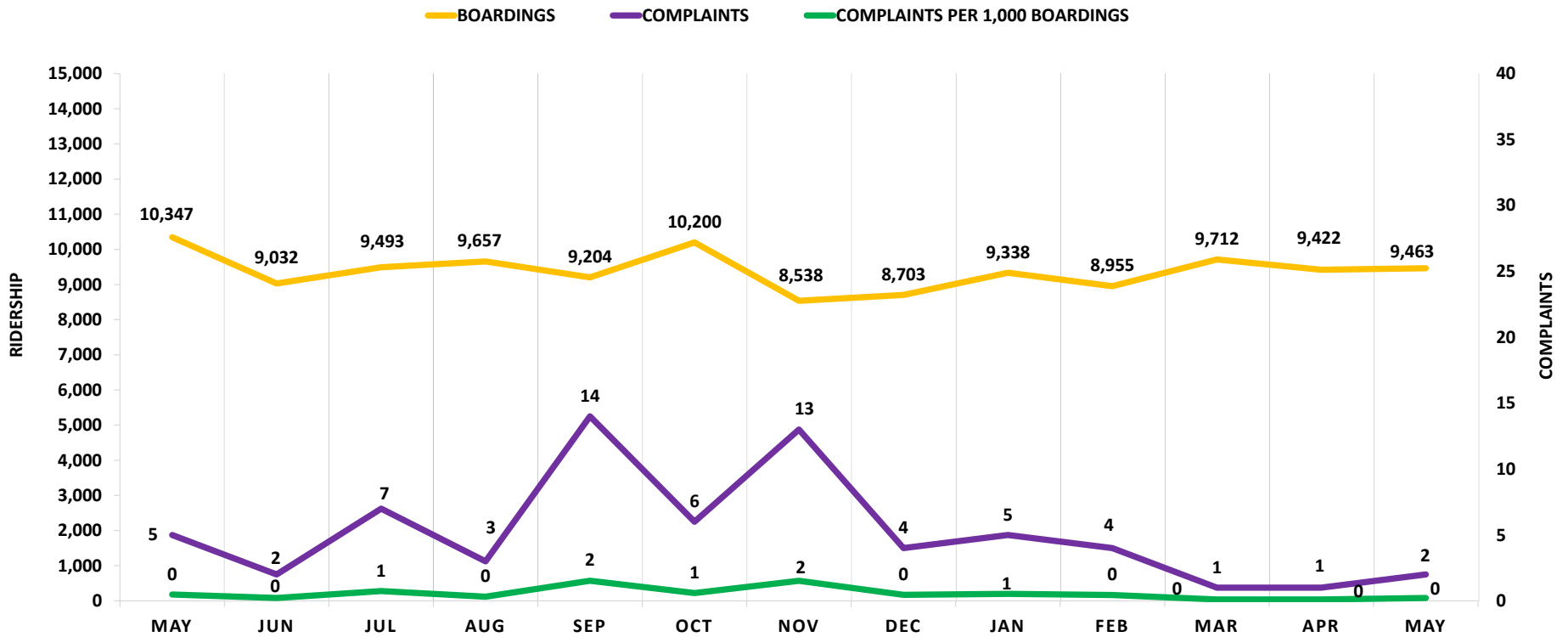
Fixed Route Customer Complaints May 2024 to May 2025



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

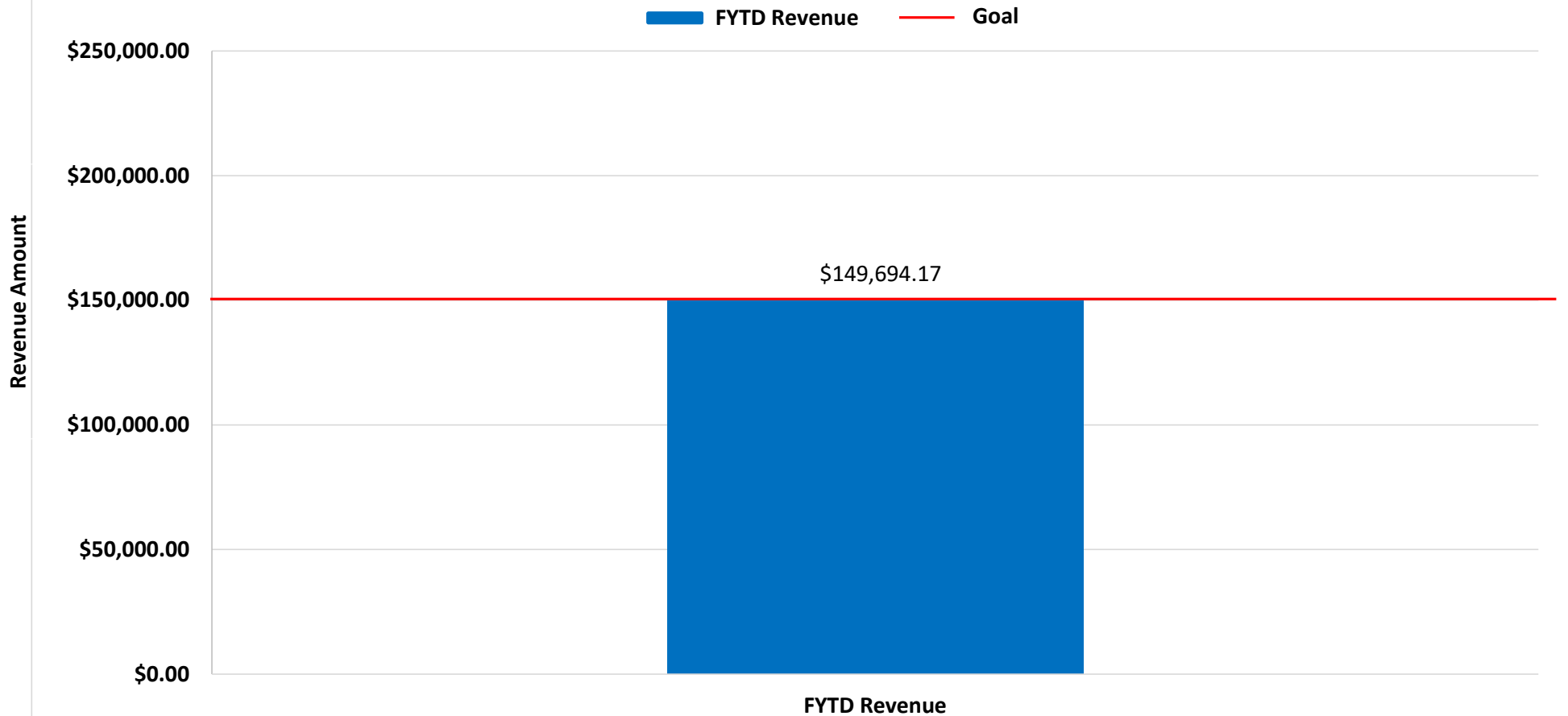
Paratransit Customer Complaints May 2024 to May 2025



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

Advertising Revenue FYTD Revenue vs. Yearly Goal May 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*).

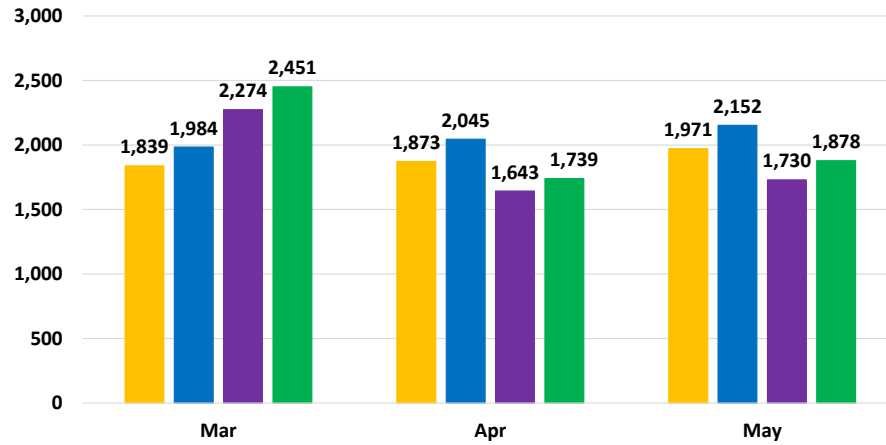
SunRide System-Wide Metrics CYTD 2025

Total Completed Trips: 9,964

Total Number of Passengers: 10,695

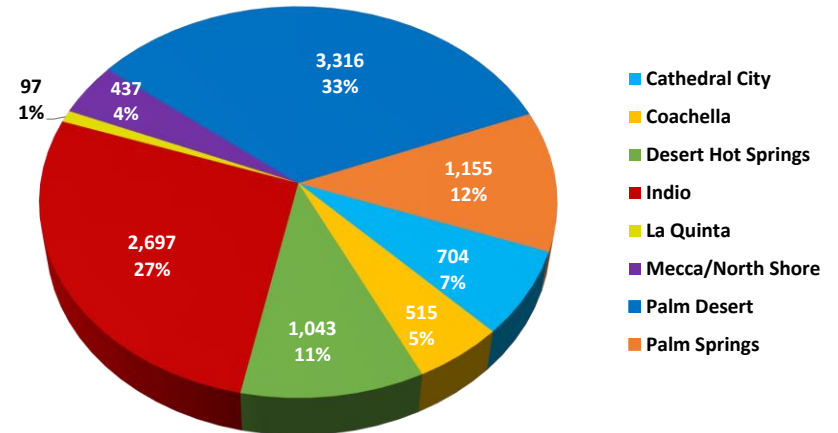
Three Month Ridership Comparison

Trips CY24 PAX CY24 Trips CY25 PAX CY25



This chart compares completed trips by passengers (PAX) for the three (3) most recent months.

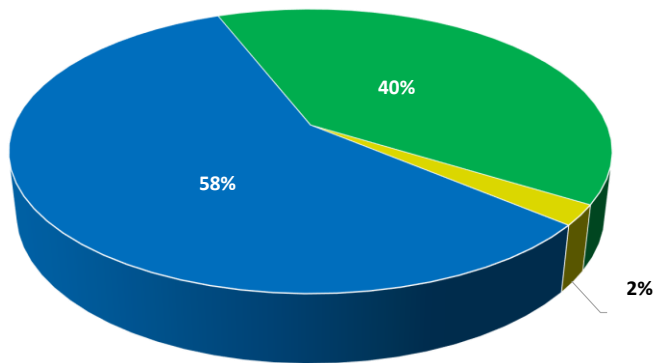
**Trips by Zone
CYTD 2025**



This pie chart illustrates the number and percentage of trips completed by each geo-fence zone for the calendar year to date (CYTD) 2025.

**SunRide Payment Method
CYTD 2025**

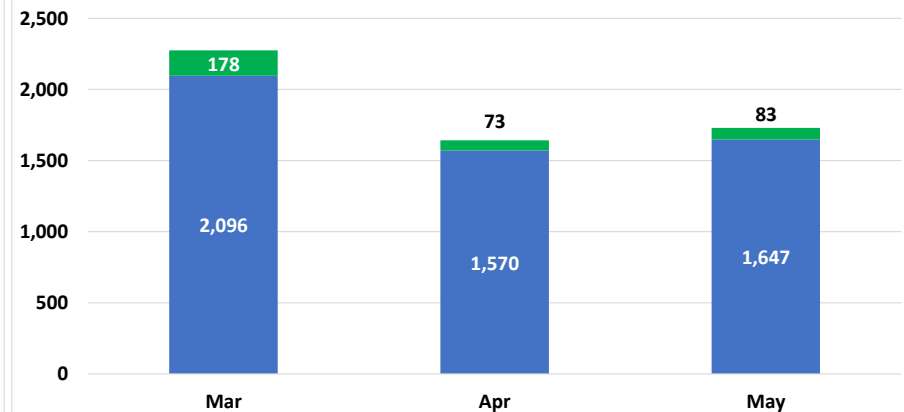
Credit Card Cash Manual Transfer Card



This pie chart illustrates the chosen method of payment for SunRide passengers by number and percentage of riders for calendar year to date (CYTD) 2025.

Trip Booking Method

App Call-In



This chart illustrates rider trip booking methods for the three (3) most recent months.



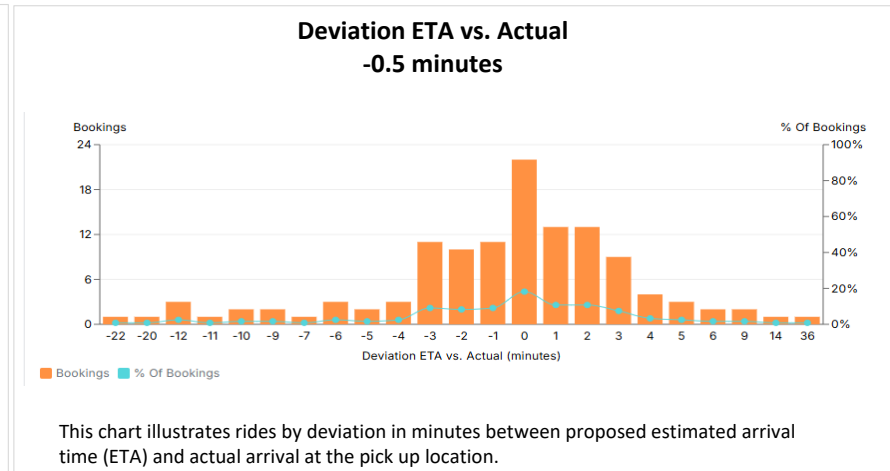
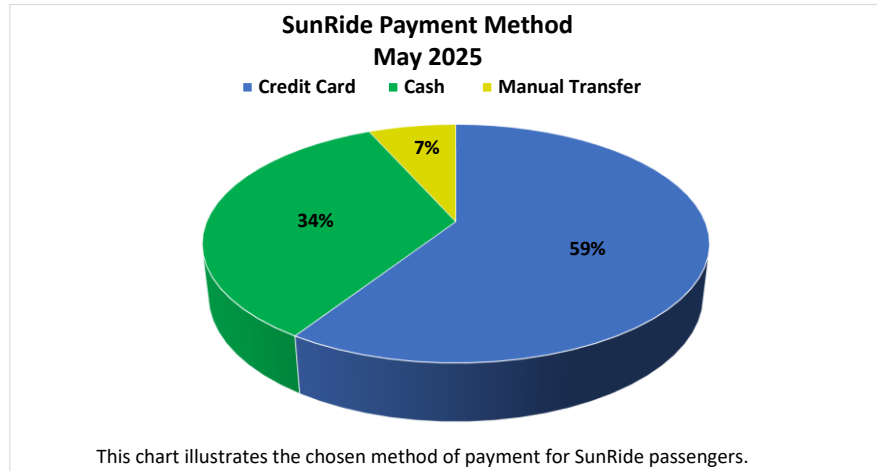
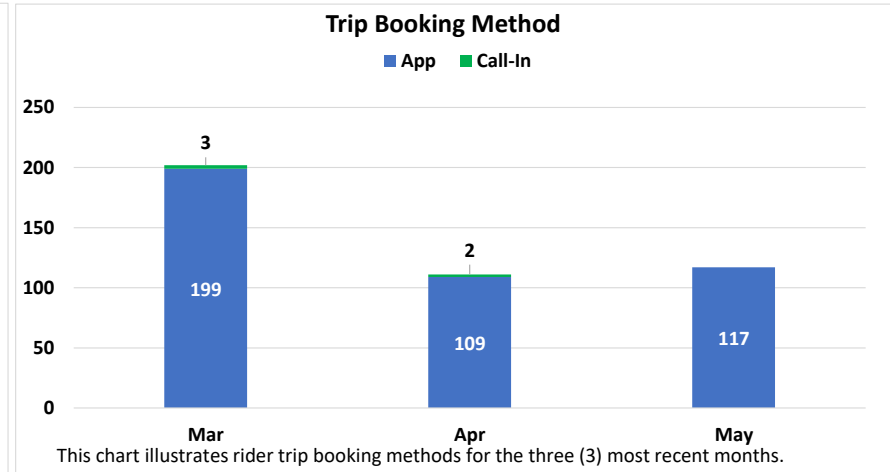
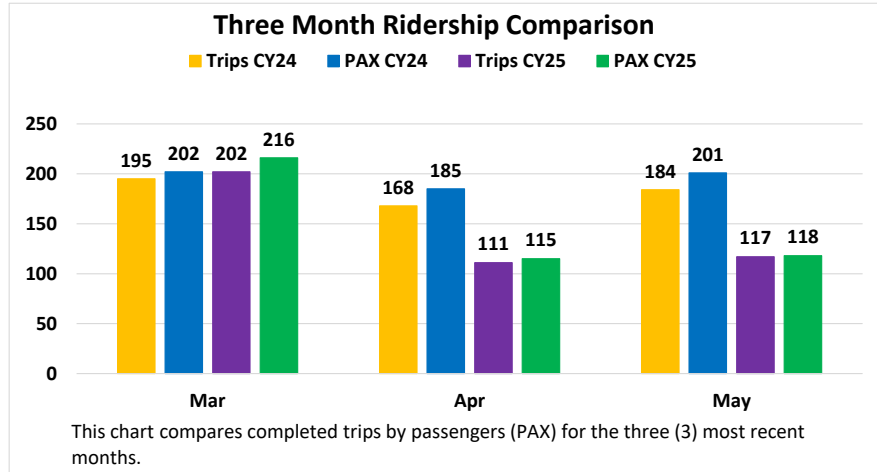
Percentage of Trips System-wide as Ridesharing: 21%.

[Based on No. of Shared Rides for the month (357) divided by Total Trips Completed (1,730).]

Cathedral City Geo-Fence Metrics CYTD 2025

Total Completed Trips: 672

Total Number of Passengers: 746



Percentage of Trips as Ridesharing: Ten (10) percent.
 [Based on No. of Shared Rides for the month (12) divided by Total Trips Completed (117).]

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



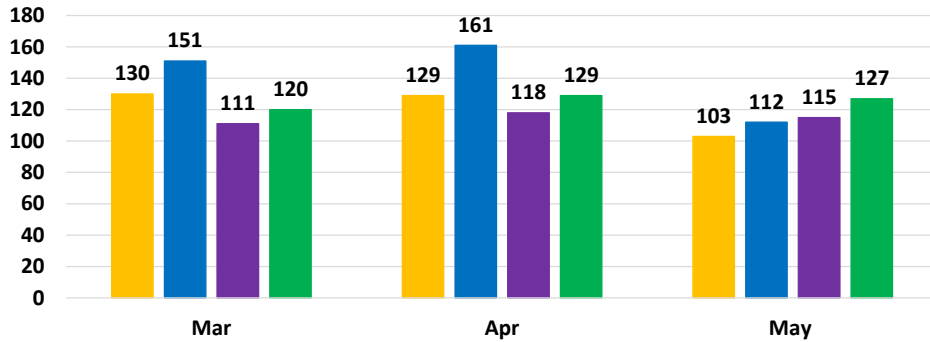
Coachella Geo-Fence Metrics CYTD 2025

Total Completed Trips: 515

Total Number of Passengers: 562

Three Month Ridership Comparison

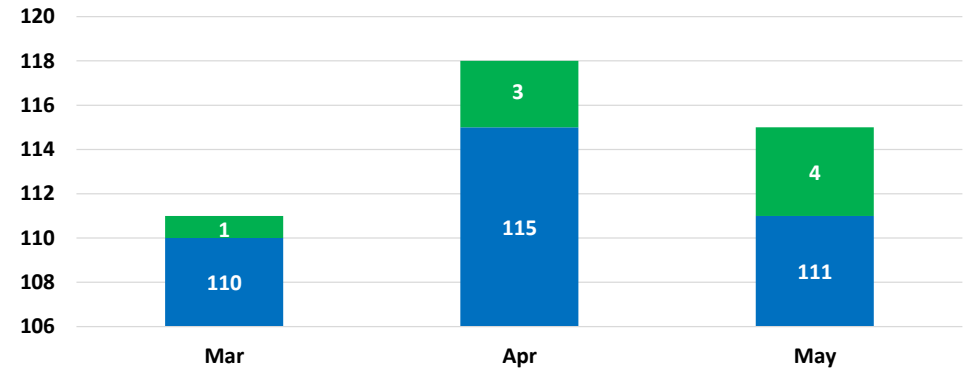
Trips CY24 PAX CY24 Trips CY25 PAX CY25



This chart compares completed trips by passengers (PAX) for the three (3) most recent months.

Trip Booking Method

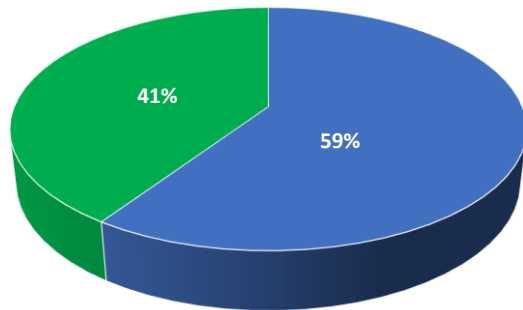
App Call-In



This chart illustrates rider trip booking methods for the three (3) most recent months.

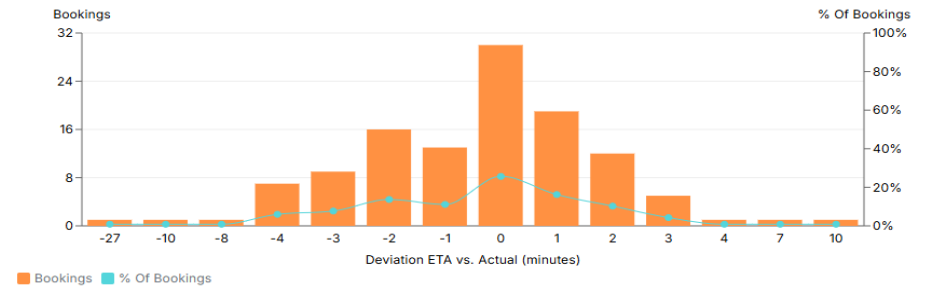
SunRide Payment Method May 2025

Credit Card Cash Manual Transfer



This chart illustrates the chosen method of payment for SunRide passengers.

Deviation ETA vs. Actual -0.6 minutes



This chart illustrates rides by deviation in minutes between proposed estimated arrival time (ETA) and actual arrival at the pick up location.



Percentage of Trips as Ridesharing: Two (2) percent.

[Based on No. of Shared Rides for the month (2) divided by Total Trips Completed (115).]

Customer Satisfaction Rating

Avg. rider trip rating: 4.9

Goal: 4.5

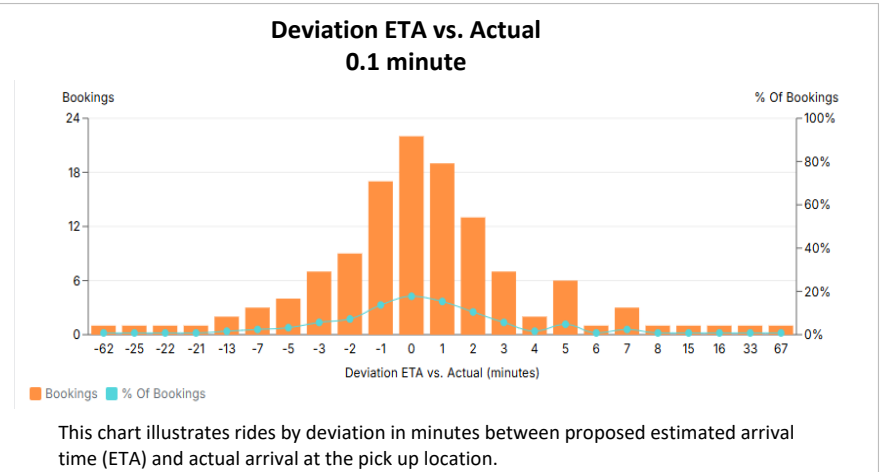
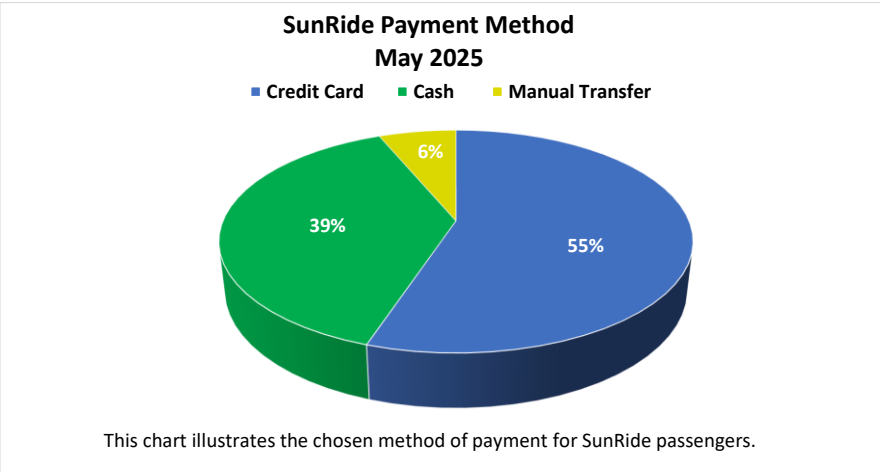
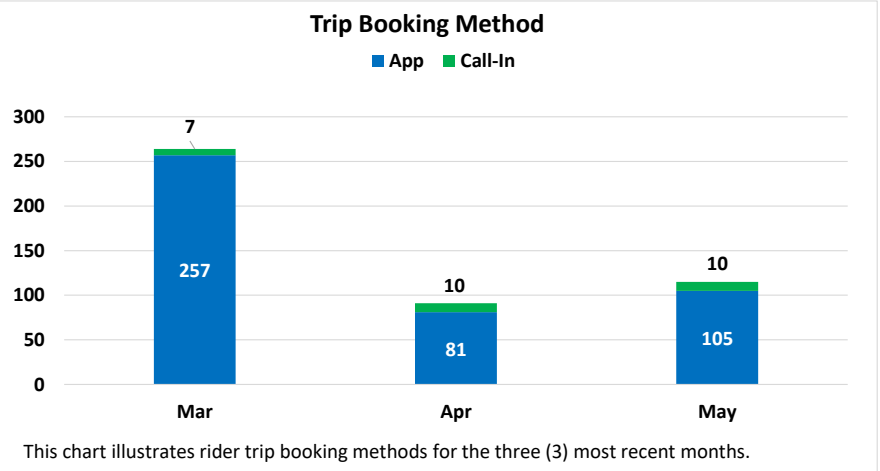
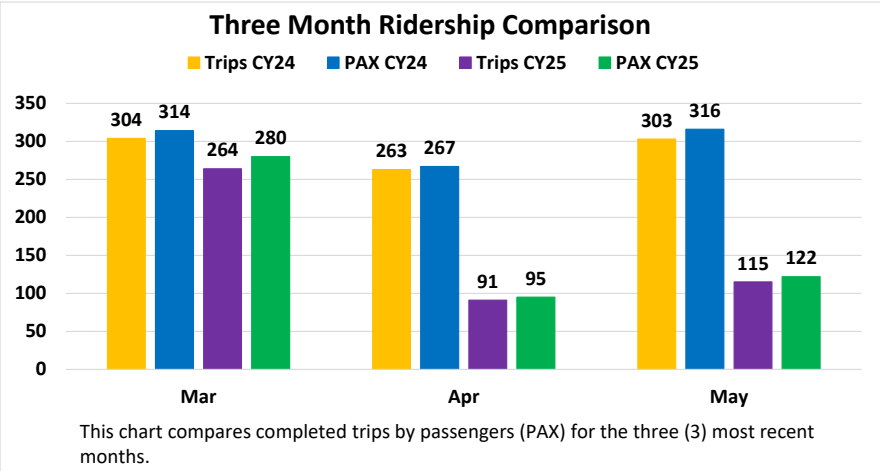


EXCEEDS GOAL!

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

Total Completed Trips: 1,043

Total Number of Passengers: 1,092



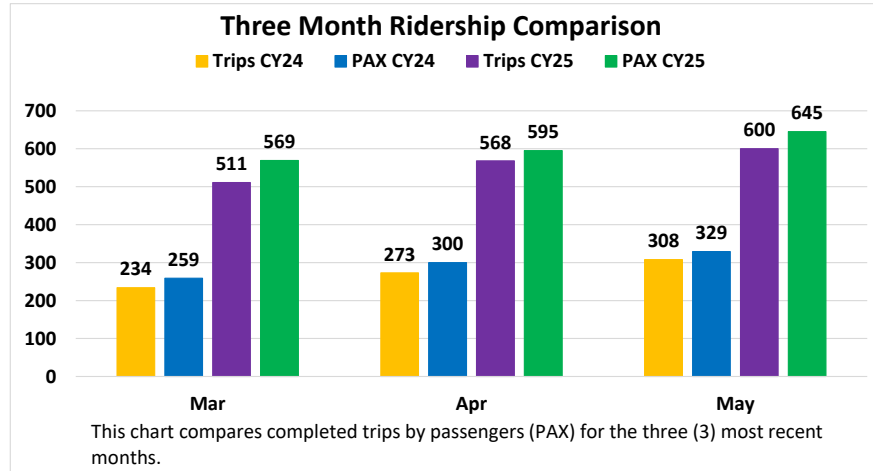
Percentage of Trips as Ridesharing: Eight (8) percent.
[Based on No. of Shared Rides for the month (9) divided by Total Trips Completed (115).]

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

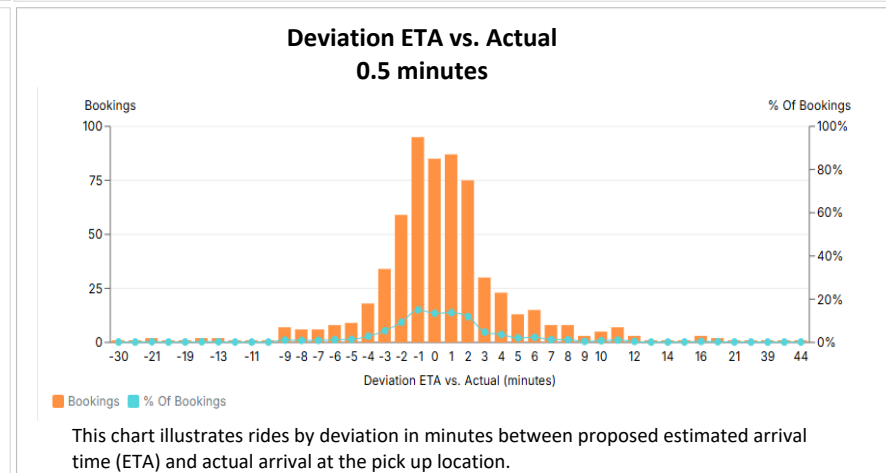
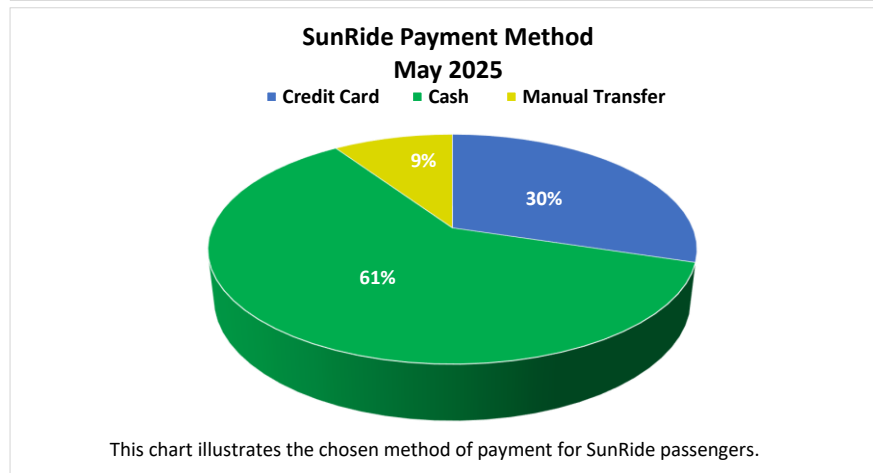
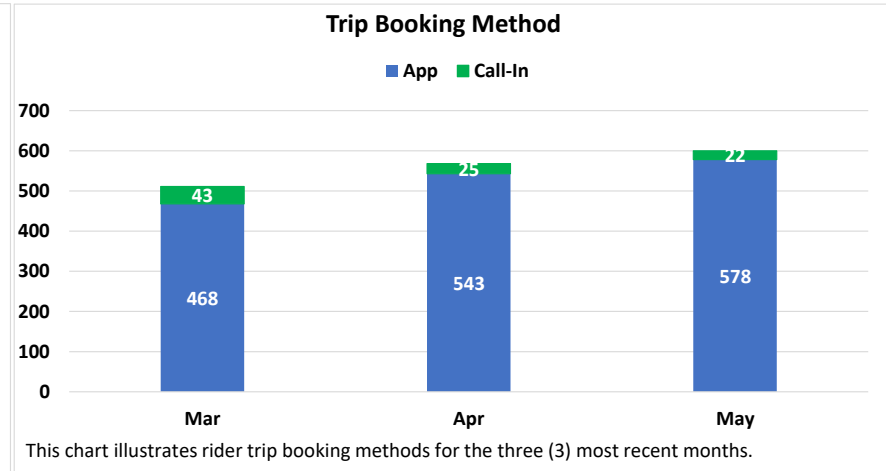


Indio Geo-Fence Metrics CYTD 2025

Total Completed Trips: 2,697



Total Number of Passengers: 2,882



Percentage of Trips as Ridesharing: 32%.

[Based on No. of Shared Rides for the month (191) divided by Total Trips Completed (600).]

Customer Satisfaction Rating

Avg. rider trip rating 4.8

Goal: 4.5



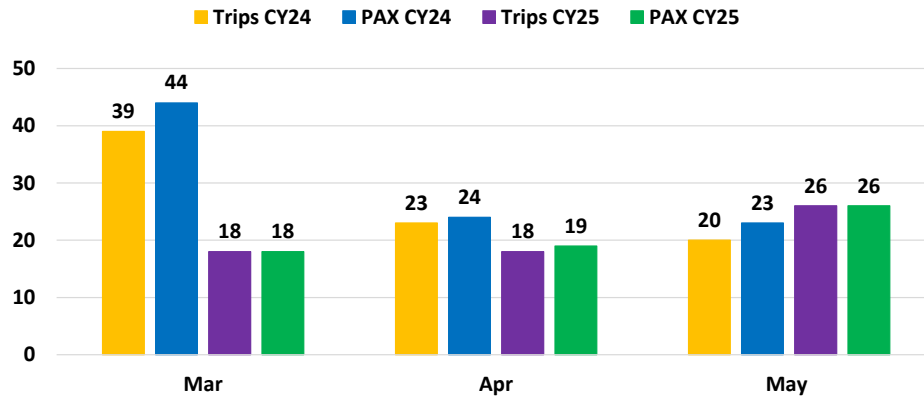
EXCEEDS GOAL

La Quinta Geo-Fence Metrics CYTD 2025

Total Completed Trips: 97

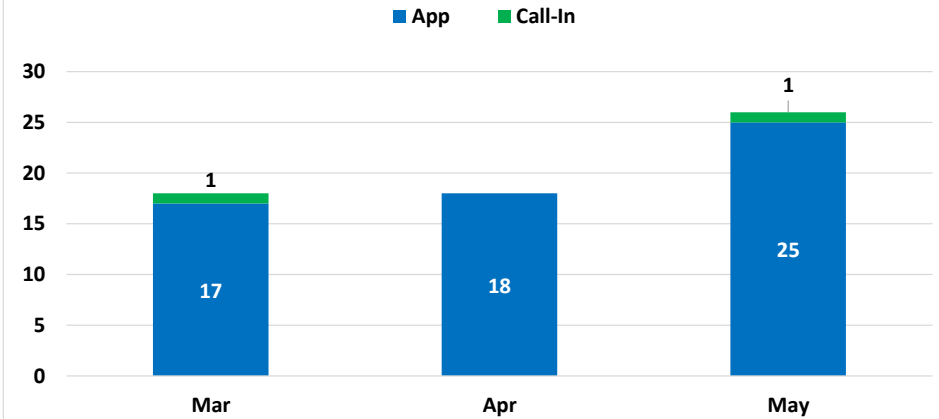
Total Number of Passengers: 99

Three Month Ridership Comparison



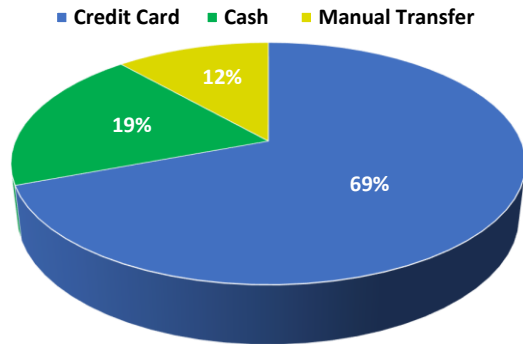
This chart compares completed trips by passengers (PAX) for the three (3) most recent months.

Trip Booking Method



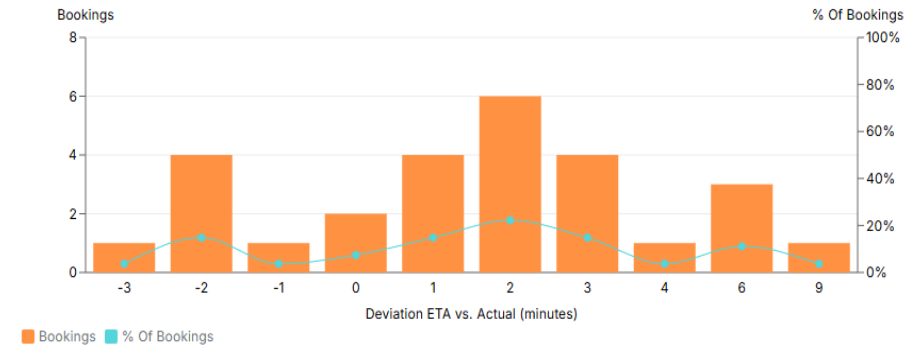
This chart illustrates rider trip booking methods for the month.

SunRide Payment Method May 2025



This chart illustrates the chosen method of payment for SunRide passengers.

Deviation ETA vs. Actual 1.7 minutes



This chart illustrates rides by deviation in minutes between proposed estimated arrival time (ETA) and actual arrival at the pick up location.



Percentage of Trips as Ridesharing: Zero (0) percent.

[Based on No. of Shared Rides for the month (0) divided by Total Trips Completed (18).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

Goal: 4.5

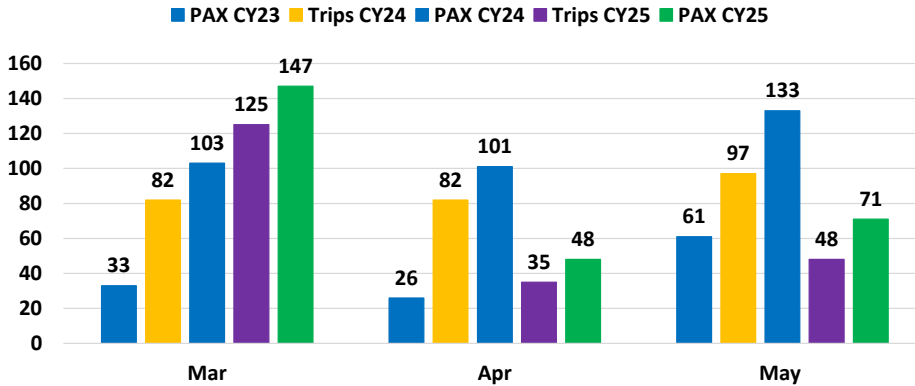


Mecca/North Shore Geo-Fence Metrics CYTD 2025

Total Completed Trips: 437

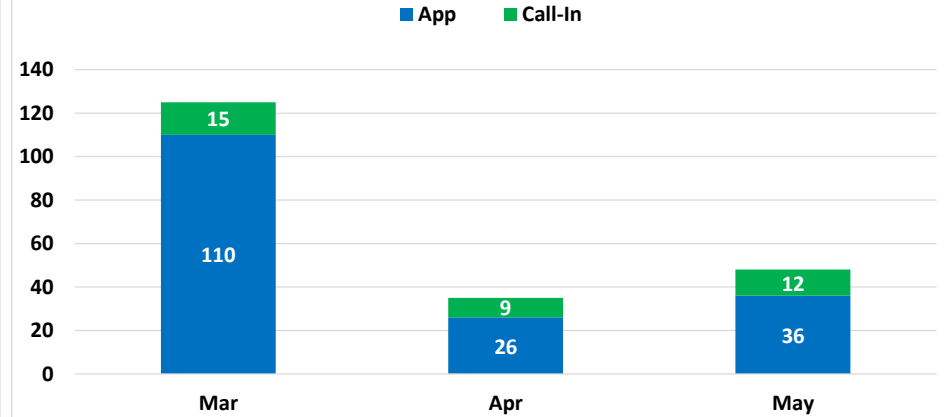
Total Number of Passengers: 546

Three Month Ridership Comparison



This chart compares completed trips by passengers (PAX) for the three (3) most recent months.

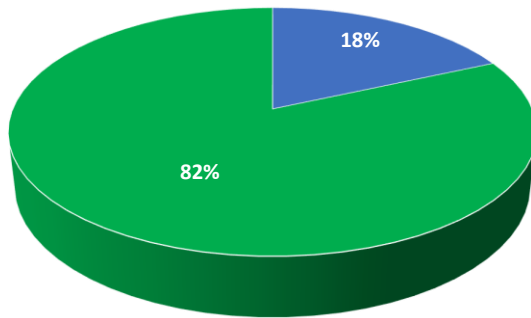
Trip Booking Method



This chart illustrates rider trip booking methods for the three (3) most recent months.

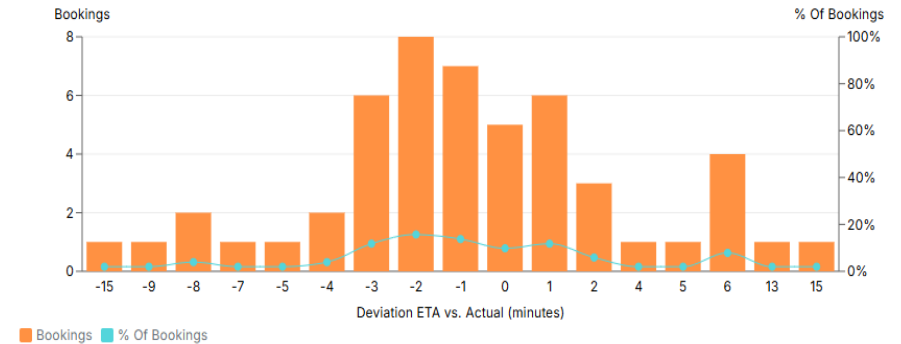
SunRide Payment Method May 2025

■ Credit Card ■ Cash ■ Manual Transfer



This chart illustrates the chosen method of payment for SunRide passengers.

Deviation ETA vs. Actual -0.6 minutes



This chart illustrates rides by deviation in minutes between proposed estimated arrival time (ETA) and actual arrival at the pick up location.



Percentage of Trips as Ridesharing: Four (4) percent.

[Based on No. of Shared Rides for the month (2) divided by Total Trips Completed (48).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

Goal: 4.5

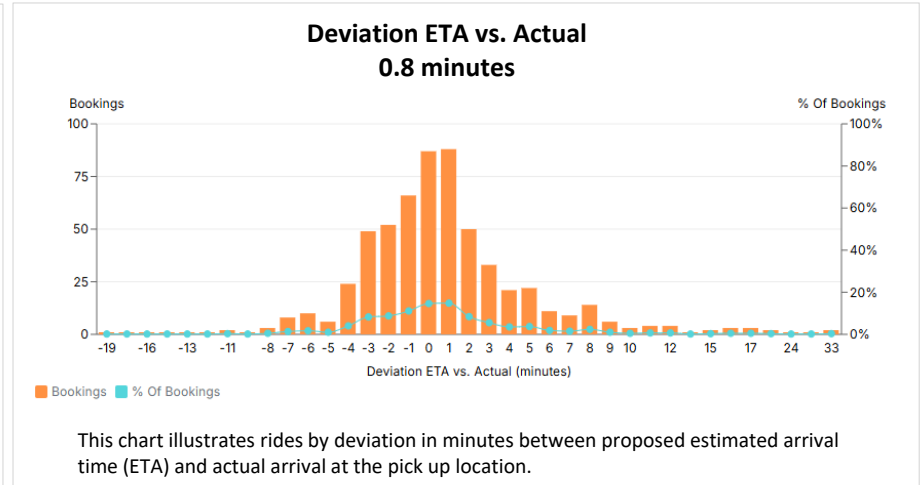
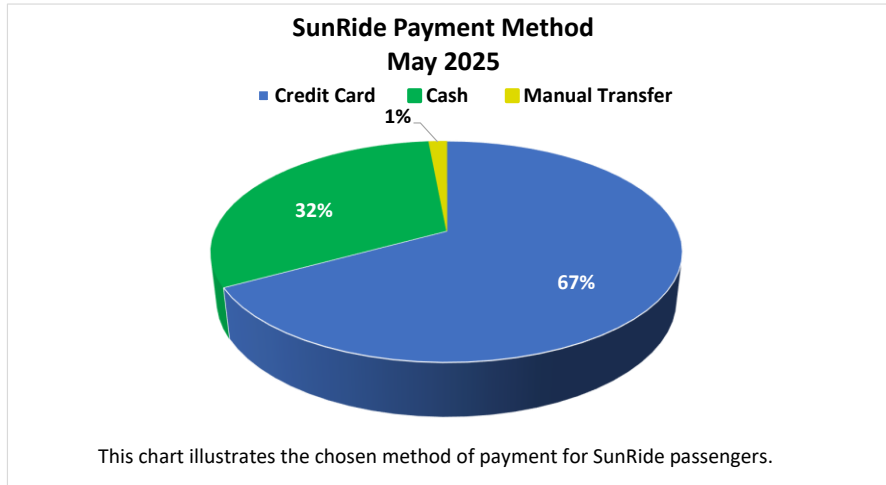
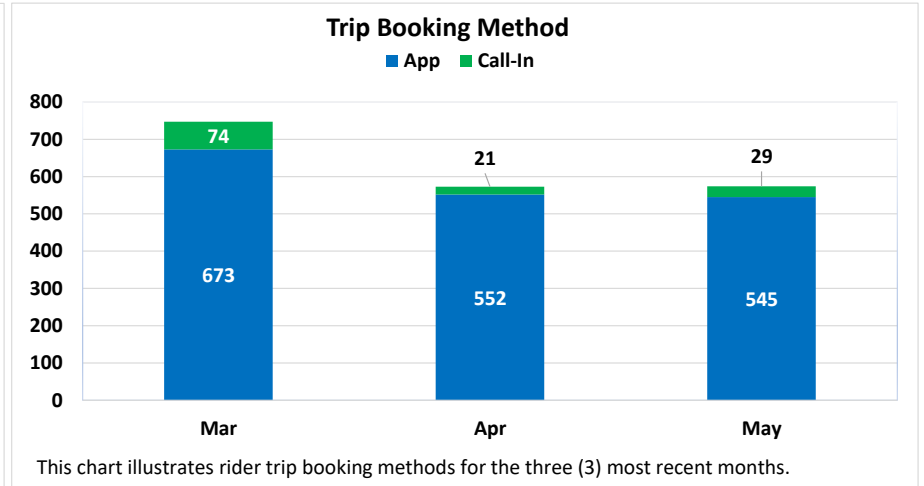
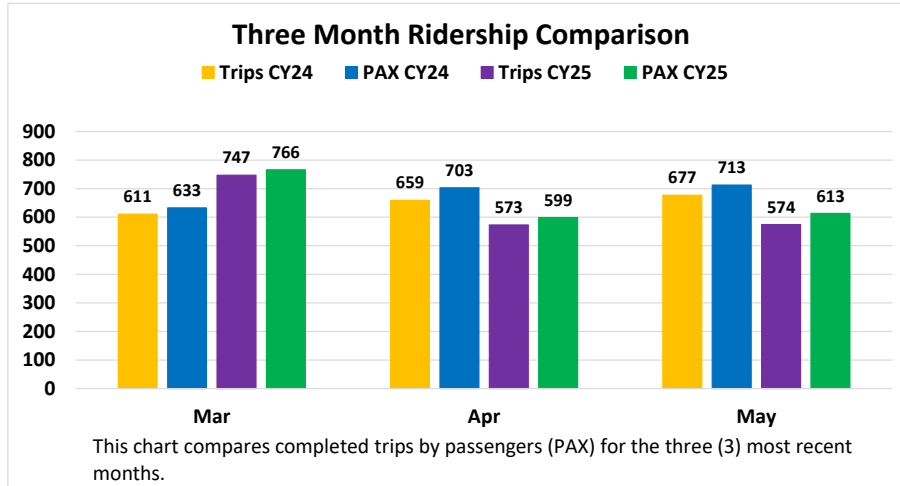


Exceeds Goal

Palm Desert Geo-Fence Metrics CYTD 2025

Total Completed Trips: 3,316

Total Number of Passengers: 3,489



Percentage of Trips as Ridesharing: 23%.

[Based on No. of Shared Rides for the month (131) divided by Total Trips Completed (574).]

Customer Satisfaction Rating

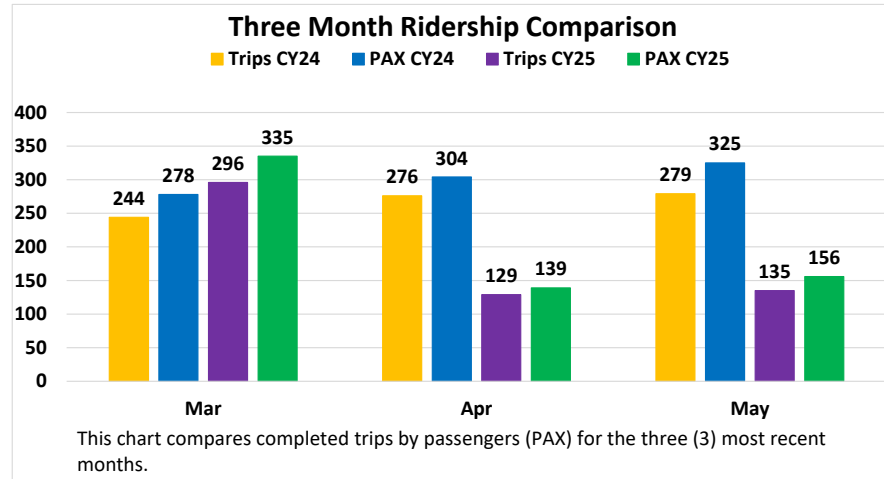
Avg. rider trip rating: 4.8
Goal: 4.5



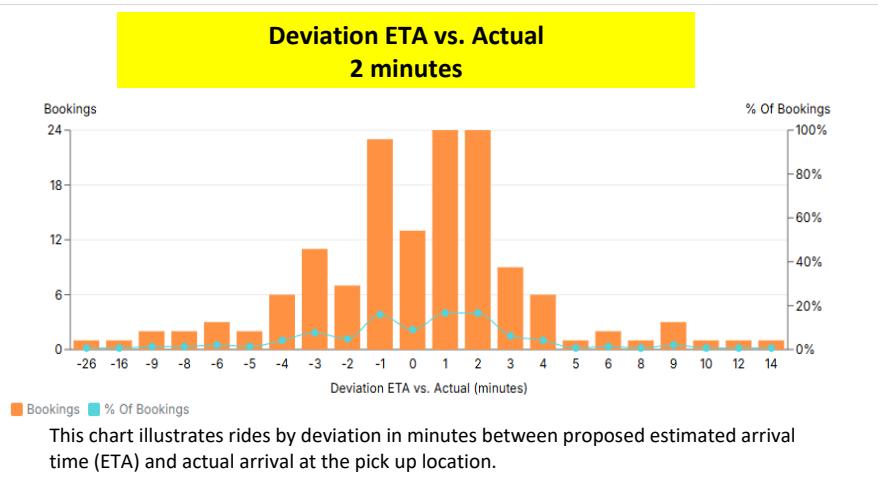
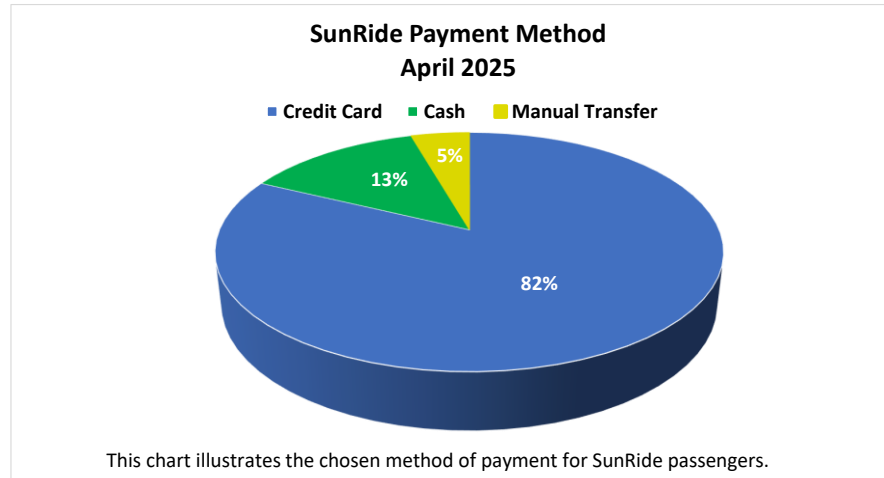
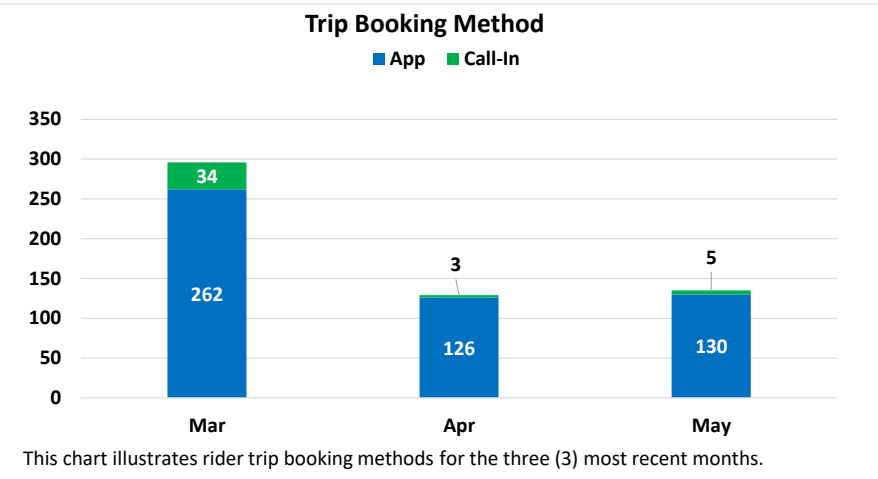
EXCEEDS GOAL!

Palm Springs Geo-Fence Metrics CYTD 2025

Total Completed Trips: 1,155



Total Number of Passengers: 1,279

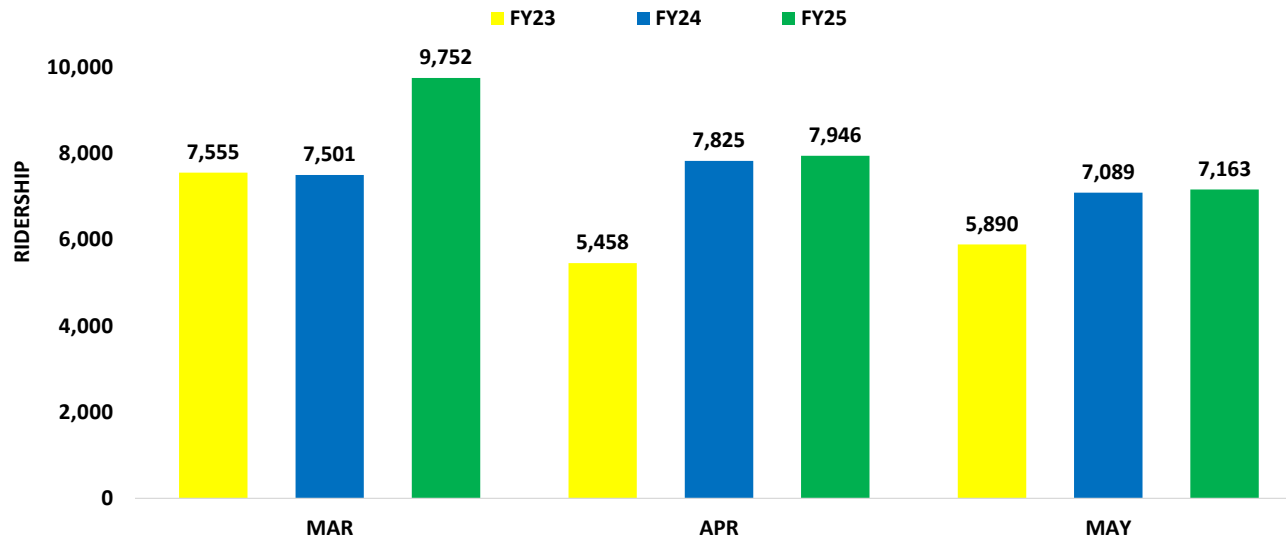


Percentage of Trips as Ridesharing: Seven (7) percent.
[Based on No. of Shared Rides for the month (10) divided by Total Trips Completed (135).]

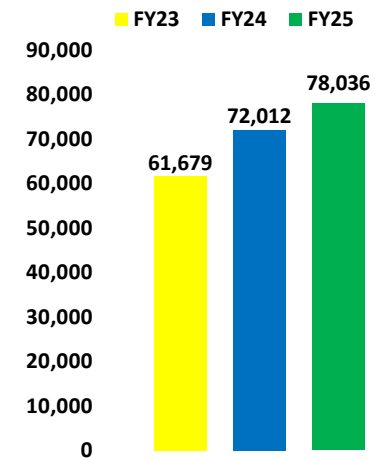
Customer Satisfaction Rating
Avg. rider trip rating 5.0
Goal: 4.5



Haul Pass COD Ridership - May 2025



COD Fixed Route Ridership Year to Date



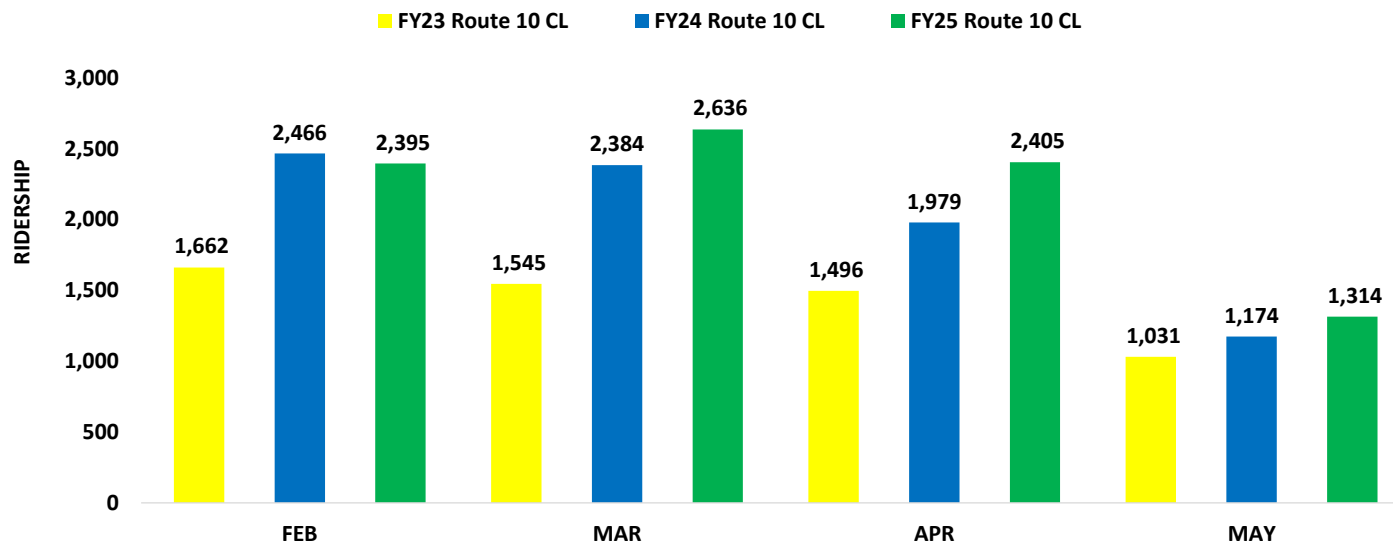
The Haul Pass program was introduced in August 2018.

This chart represents monthly ridership on the Haul Pass COD.

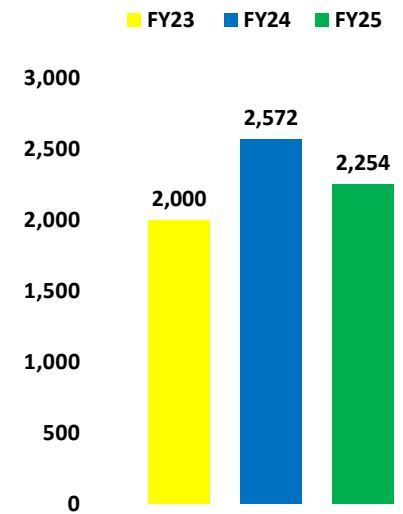
ID Card swipe contributed 110 rides. Token Transit contributed 6,906 rides. 31 Day Paper Pass contributed 147 rides.

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

Haul Pass CSUSB Ridership - May 2025



CSUSB Fixed Route Ridership Total

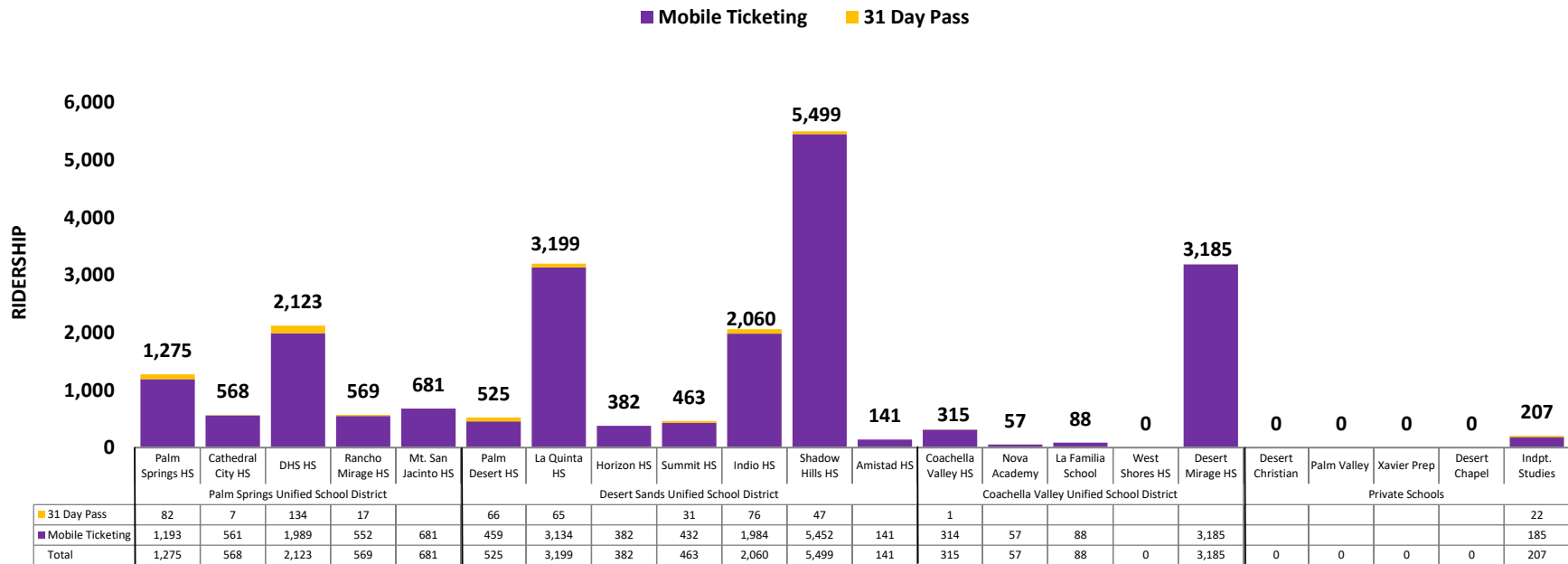


The Haul Pass CSUSB program was introduced in September 2019.

This chart represents monthly ridership on the Haul Pass CSUSB.

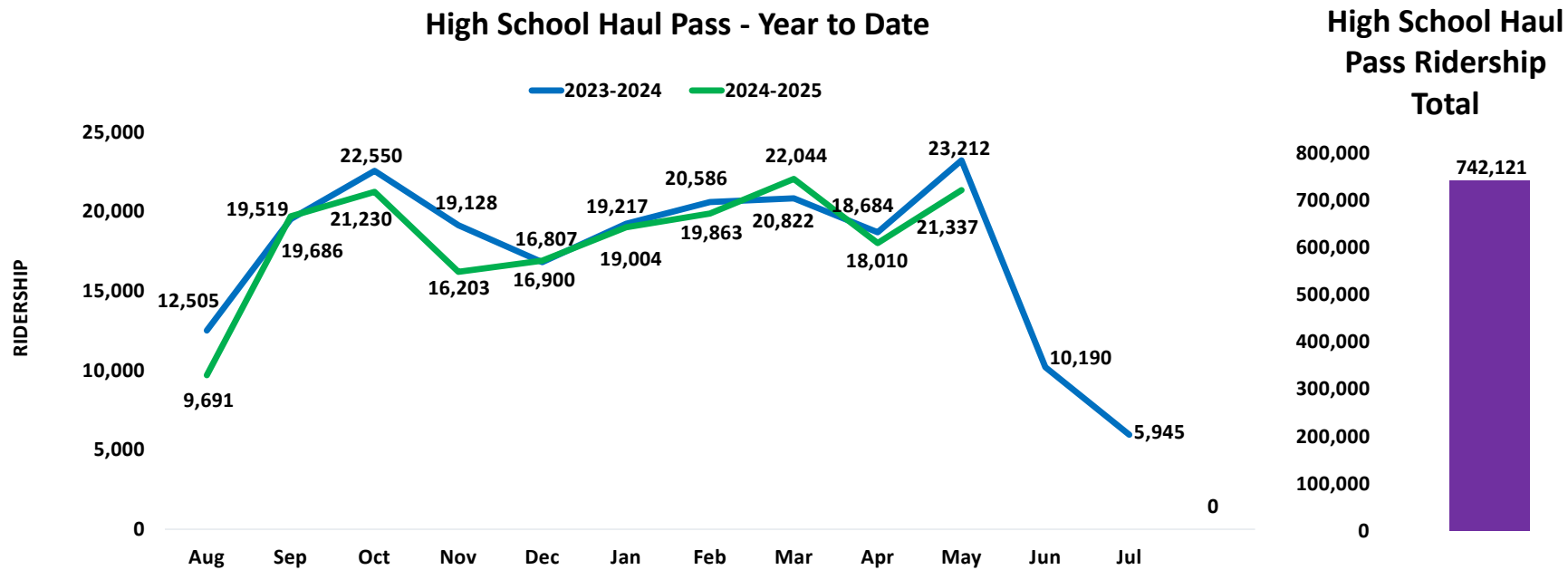
For the month of May 2025, CSUSB contributed 1,314 rides from 204 unique users. From that total, 1,134 rides were used on Route 10 and 180 rides on the fixed route system.

High School Haul Pass - May 2025



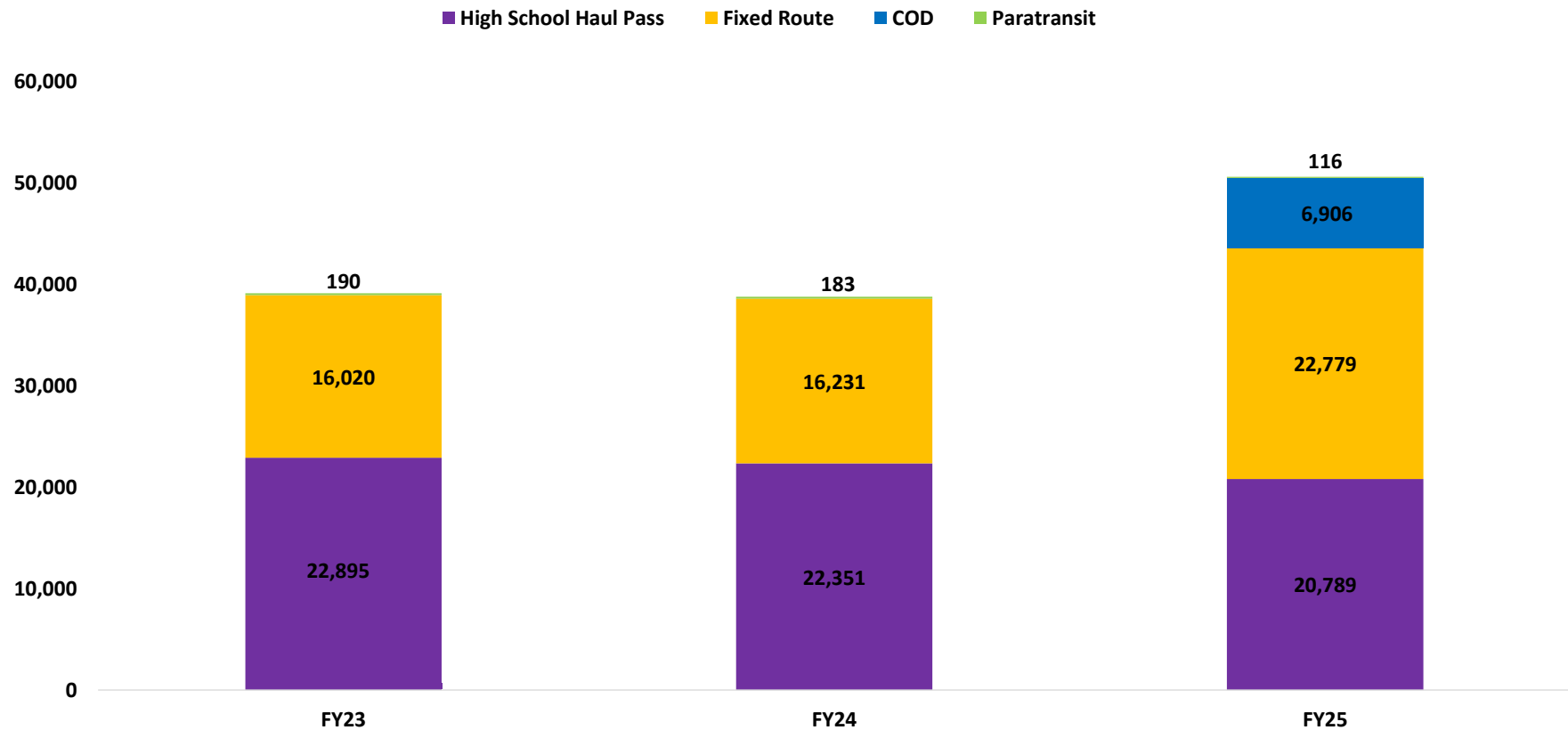
The High School Haul Pass program was introduced in August 2021.

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



The 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 - May 2025



This chart represents all monthly mobile ticketing usage by category based on the Token Transit app data.

The total for May 2025 includes the following passes used through Token Transit: High School Haul Pass, COD Haul Pass, Fixed Route and Paratransit.

Mobile Ticketing was introduced for COD Haul Pass in June 2024.

SunLine Transit Agency

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Board Member Attendance for June 2025

Summary:

The attached report summarizes the Board of Directors' attendance for fiscal year to date June 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	X	X	X	X	10	9
Palm Desert	X		X	X		X	X	X	X	X	X	X	10	10
Palm Springs	X		X	X		X	X	X	X	X	X	X	10	10
Cathedral City	X		X	X			X	X	X	X	X	X	10	9
Rancho Mirage	X		X	X		X	X	X	X	X	X	X	10	10
Indian Wells	X			X		X		X	X	X	X	X	10	8
La Quinta	X		X	X		X	X	X	X	X	X	X	10	10
Indio	X		X	X		X	X	X	X		X	X	10	9
Coachella	X		X	X			X		X	X	X	X	10	8
County of Riverside	X		X	X		X	X	X	X	X	X	X	10	10

X - ATTENDED (Primary/Alternate)

DARK –

SunLine Transit Agency

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Board of Directors

RE: Approval of Joint Board Meeting Minutes for June 25, 2025

Summary:

The attached report summarizes the Joint Board Meeting Minutes from the Board of Directors' meeting held on June 25, 2025.

Recommendation:

Approve.

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JUNE 25, 2025**

MINUTES

**Joint SunLine Transit Agency/SunLine Services Group
Board of Directors Meeting
June 25, 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, June 25, 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

Board Member Pitts 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

Denise Delgado, SunLine Agency Board Member, City of Coachella

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

Glenn Miller, SunLine Agency Board Member, City of Indio

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

Dr. Toper Taylor, SunLine Agency Board Member Alternate, City of Indian Wells

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

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

4. FINALIZATION OF AGENDA

No changes to the agenda.

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JUNE 25, 2025**

5. PUBLIC COMMENTS

Three (3) public comments were made by:

- Anthony Garcia
- James Roehr
- Jesus Gonzalez

6. PRESENTATIONS

None.

7. BOARD MEMBER COMMENTS

Board Member comments were made by:

- Board Member Garner, City of Palm Springs
- Board Member Miller, City of Indio
- Chairperson Ross, City of Cathedral City
- Mona Babauta, CEO/General Manager

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

8. CONSENT CALENDAR

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

9. AWARD OF CONTRACT FOR COMPREHENSIVE OPERATIONAL ANALYSIS 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. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

10. ADOPTION OF THE FISCAL YEAR 2026 OPERATING AND CAPITAL BUDGET

Finance/Audit Committee Chair Mallotto reported that this item was brought to the Finance/Audit Committee and they unanimously motioned to approve this item. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

Comments were made by:

- Board Member Alternate Taylor, City of Indian Wells
- Mona Babauta, CEO/GM

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JUNE 25, 2025**

11. AWARD OF CONTRACT FOR FINANCIAL AUDITING 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. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

12. REVISED ADVERTISING POLICY

Board Operations Committee Chair Peña reported that this item was brought to the Board Operations Committee and they unanimously motioned to approve this item. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

Comments were made by:

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

13. ADOPTION OF FISCAL YEAR 2026-2028 SHORT RANGE TRANSIT PLAN

Strategic Planning & Operational Committee Chair Delgado reported that this item was brought to the Strategic Planning & Operational Committee and they unanimously motioned to approve this item. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

14. ADOPTION OF FISCAL YEAR 2026 STRATEGIC PLAN

Strategic Planning & Operational Committee Chair Delgado reported that this item was brought to the Strategic Planning & Operational Committee and they unanimously motioned to approve this item. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

**15. ADOPTION OF THE FISCAL YEAR 2026 SUNLINE REGULATORY
ADMINISTRATION BUDGET**

Taxi Committee Chair Miller reported that this item was brought to the Taxi Committee and they unanimously motioned to approve this item. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

16. OPTIONS – VISION STATEMENT

An oral report was presented by Greg Wildman, Chief of Strategic Alignment, regarding this Action item. Following discussion, the Board of Directors did not approve the proposed vision statement options. Staff will reassess the item and bring it back for consideration at a future meeting.

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JUNE 25, 2025**

17. ELECTION OF OFFICERS

Clerk of the Board, Vanessa Ordorica, opened the floor for nominations for the election of officers. Board Member Miller nominated Vice-Chairperson Mallotto for Chairperson. Board Member Harnik nominated Board Member Peña for Vice-Chairperson. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

18. AWARD OF CONTRACT FOR FEDERAL ADVOCACY SERVICES

Finance/Audit Committee Chair Mallotto reported that Edith Hernandez, Director of Board and Legislative Affairs, provided an oral report on this Information item during the Finance/Audit Committee meeting. No action was taken.

19. AWARD OF CONTRACT FOR STATE ADVOCACY SERVICES

Finance/Audit Committee Chair Mallotto reported that Edith Hernandez, Director of Board and Legislative Affairs, provided an oral report on this Information item during the Finance/Audit Committee meeting. No action was taken.

20. LEGISLATIVE UPDATE FOR JUNE 2025

An oral report was provided by Edith Hernandez, Director of Board and Legislative Affairs on this Information item. No action was taken.

Comments were made by:

- Supervisor Perez, County of Riverside
- Board Member Alternate Taylor, City of Indian Wells
- Board Member Harnik, City of Palm Desert
- Mona Babauta, CEO/General Manager

21. CEO/GENERAL MANAGER'S REPORT

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

22. NEXT MEETING DATE

July 23, 2025 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JUNE 25, 2025**

23. ADJOURN

The SunLine Services Group and SunLine Transit Agency meeting concurrently adjourned at 1:00 p.m.

Respectfully Submitted,

Vanessa Ordorica
Clerk of the Board

SunLine Services Group

CONSENT CALENDAR

DATE: July 23, 2025

APPROVE

TO: Taxi Committee
Board of Directors

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

Summary:

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

Recommendation:

Approve.

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
HANSON BRIDGETT LLP	Legal Service	91419	05/28/2025	3,724.00
Total Checks Over \$1,000	\$3,724.00			
Total Checks Under \$1,000	\$2,036.67			
Total Checks	\$5,760.67			

SunLine Services Group**CONSENT CALENDAR**

DATE: July 23, 2025

APPROVETO: Taxi Committee
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for May 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 1/12th of the annual budget. The FYTD budget values for the month of May 2025 are equal to 11/12^{ths} of the yearly budget.

Year to Date Summary

- As of May 31, 2025, the organization's revenues are \$48,693 or 28.02% above the FYTD budget.
- As of May 31, 2025, expenditures are \$41,135 or 23.67% below the FYTD budget.
- The net FYTD operating gain (loss) after expenses is \$89,828.

Recommendation:

Approve.

SunLine Regulatory Administration
Budget Variance Report
May 2025

Description	FY25 Total Budget	Current Month			Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Revenues:								
Revenue Fines	3,500	400	292	108	1,825	3,208	(1,383)	47.9%
New Driver Permit Revenue	750	75	63	13	1,725	688	1,038	-130.0%
Taxi Business Permit	96,000	8,000	8,000	(0)	113,028	88,000	25,028	-17.7%
Driver Transfer Revenue	125	-	10	(10)	275	115	160	-120.0%
Driver Renewal Revenue	1,725	75	144	(69)	2,125	1,581	544	-23.2%
Driver Permit Reinstatement/Replacement	-	10	-	10	40	-	40	0%
Vehicle Permit Revenue	86,000	6,238	7,167	(929)	103,475	78,833	24,641	-20.3%
Operator Application Fee	1,500	-	125	(125)	-	1,375	(1,375)	100.0%
Total Revenue	189,600	14,797	15,800	(1,003)	222,493	173,800	48,693	28.0%
Expenses:								
Salaries and Wages	88,369	4,209	7,364	3,155	45,870	81,005	35,135	48.1%
Fringe Benefits	61,290	2,798	5,108	2,310	22,899	56,183	33,284	62.6%
Services	18,315	8,241	1,526	(6,714)	46,718	16,789	(29,929)	-155.1%
Supplies and Materials	3,585	-	299	299	12,052	3,286	(8,766)	-236.2%
Utilities	5,802	-	484	484	-	5,319	5,319	100.0%
Casualty and Liability	5,589	-	466	466	-	5,123	5,123	100.0%
Taxes and Fees	50	-	4	4	-	46	46	100.0%
Miscellaneous	6,600	63	550	487	5,126	6,050	924	22.3%
Total Expenses	189,600	15,310	15,800	490	132,665	173,800	41,135	23.7%
Total Operating Surplus (Deficit)	\$ -	\$ (513)			\$ 89,828			

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 9,969 taxi trips compared to FYTD24.

Taxi Trips

	FY24-May	FY25-May	Variance	%Δ
Trips	8,426	8,065	(361)	-4.3%

Taxi Trips

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Trips	106,657	96,688	(9,969)	-9.3%

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: July 23, 2025

APPROVETO: Taxi Committee
Board of Directors

RE: Acceptance of Taxi Trip Data – May 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 May, there were 361 fewer taxi trips in May 2025 serviced by nine (9) more cabs when compared to May 2024 (85 cabs in 2025 compared to 76 cabs in 2024).

There were 9,969 fewer taxi trips for FYTD25 compared to FYTD24.

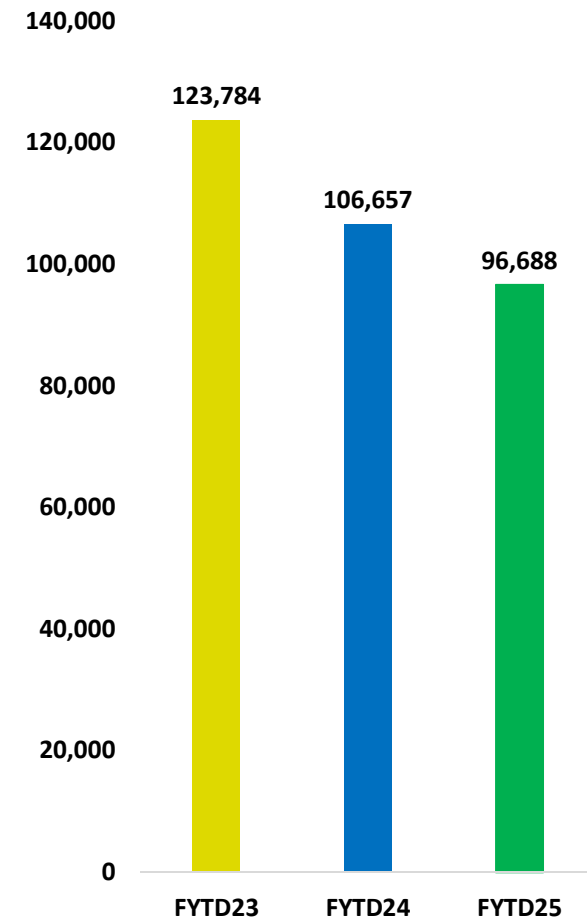
Recommendation:

Approve.

Taxi Trip Three (3) Month Comparison as of May 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
SunLine Services Group**

DATE: July 23, 2025 **APPROVE**

TO: Board of Directors

FROM: Lynn Mallotto, Chairperson of the Board

RE: Acceptance of Ratification of Provisional Committee Appointments

Recommendation

Ratify the provisional committee and committee officer appointments to the Finance/Audit Committee, Board Operations Committee, Strategic Planning & Operational Committee, and Taxi Committee.

Background

Per Section 8.1 of SunLine's Board Bylaws, the Chairperson is authorized to make provisional appointments to each Committee, including designating each Committee's Chairperson and Vice-Chairperson, as well as filling any vacancies that may arise throughout the year.

The following provisional appointments were made to the Board's Committees:

Finance/Audit Committee

- Chairperson – John Peña
- Vice-Chairperson – Bruce Whitman
- Member – Daniel Pitts
- Member – Nancy Ross
- Member – Glenn Miller

Board Operations Committee

- Chairperson – Nancy Ross
- Vice-Chairperson – Glenn Miller
- Member – Denise Delgado

- Member – John Peña

Strategic Planning & Operational Committee

- Chairperson – Denise Delgado
- Vice-Chairperson – Jan Harnik
- Member – Daniel Pitts
- Member – Grace Garner
- Member – V. Manuel Perez

Taxi Committee

- Chairperson – Glenn Miller
- Vice-Chairperson – Daniel Pitts
- Member – Grace Garner
- Member – Bruce Whitman

Financial Impact

No financial impact.

Attachment:

- [Item A](#) – SunLine Transit Agency/SunLine Services Group FY 2025/26 Board Committee Appointments

**SunLine Transit Agency/SunLine Services Group
Board Committee Assignments
FY 2025/26 COMMITTEE APPOINTMENTS**

	Finance/Audit Committee (5) Meet prior to each Board meeting	Board Operations Committee (4) Meet as needed	Strategic Planning & Operational Committee (5) Meet as needed	Taxi Committee (4) Meet as needed
John Peña La Quinta	C	M		
Denise Delgado Coachella		M	C	
Daniel Pitts Desert Hot Springs	M		M	V
Grace Garner Palm Springs			M	M
Lynn Mallotto Rancho Mirage				
Nancy Ross Cathedral City	M	C		
Jan Harnik Palm Desert			V	
Bruce Whitman Indian Wells	V			M
Glenn Miller Indio	M	V		C
V. Manuel Perez Riverside County			M	

M indicates Committee Member; C indicates Committee Chair; V indicates Vice Chair

Updated 07/2025

SunLine Transit Agency

DATE:	July 23, 2025	ACTION
TO:	Finance/Audit Committee Board of Directors	
FROM:	Walter Watcher, Chief of Capital Projects	
RE:	Award of Contract for Security Fence Upgrade	

Recommendation

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to execute a contract with the lowest, responsive and responsible bidder, Three Peaks Corp (Three Peaks), to construct new gates, install automatic openers and perform other security upgrades for a lump sum amount of \$492,864.00 in full conformity with the terms and conditions of the solicitation and in a form approved by General Counsel, and authorize the CEO/General Manager, or designee, to exercise up to a ten-percent contingency of \$49,286.00 for a total not-to-exceed project amount of \$542,150.00.

Background

The current vehicle access gates at SunLine Transit Agency's (SunLine) Thousand Palms facility serving buses, visitors, employee traffic and delivery vehicles are no longer adequate to meet the operational demands. These gates are critical for transit buses entering and exiting the facility at the start and end of each trip and are used continuously throughout the day by staff and service vehicles. The southern entrance, in particular, has become a persistent point of failure. Its existing rolling gate is outdated, susceptible to high wind events, and frequently derails from its track, causing extended delays. Additionally, its slow mechanical operation contributes to traffic congestion on Harry Oliver Trail as returning buses are forced to wait in the public right-of-way. To address these concerns, staff engaged an engineering firm to redesign the southern entrance by relocating the gate 60 feet inside the property line and replacing the current system with robust, dual swinging gates. The new gates will open in less time and are better suited to withstand desert wind conditions.

Similarly, the northern access gate has experienced recurring malfunctions due to wind stress, and the existing gate operator is no longer reliable. Compounding the issue, the current placement of the guard shack is misaligned with vehicle approach lanes, making it difficult for guards to efficiently assist drivers and visitors. Under the proposed upgrade, a new guard shack will be constructed directly in line with vehicle traffic, enabling easier ID verification and visitor assistance through direct driver-side access. The project also includes the installation of industrial-grade gate openers designed for high-cycle use and

improved resistance to environmental wear. These improvements will reduce street-level congestion, increase gate reliability, and ensure a safer, more controlled perimeter environment for SunLine's operations.

On May 12, 2025, staff issued Invitation for Bid (IFB) Solicitation 25-003 Security Fence Upgrade for procurement of public work services to upgrade SunLine's northern and southern site fence and access gates. The IFB was publicly advertised in a newspaper of general circulation and was posted on SunLine's website.

On July 10, 2025, SunLine received bids from three (3) contractors.

Staff reviewed the apparent low bid submitted by Inland Highway Services Corp. (Inland) in response to the IFB. Inland's bid was found to be non-responsive for failure to submit a properly executed bid bond. This is a material irregularity that cannot be waived by SunLine.

Staff reviewed the second lowest bid which was submitted by Three Peaks to ensure compliance with the requirements of the IFB. Based on a thorough review, staff recommends awarding a contract to Three Peaks, the lowest responsive and responsible bidder. The price is found to be fair and reasonable in comparison to the Independent Cost Estimate (ICE) and all bids were received under full and open competition.

In addition to the bid amount, staff also recommends the Board authorize a ten-percent contingency of \$(49,286.00) to be utilized in the event of unforeseen circumstances. Such use would be subject to a future change order or amendment to the proposed contract if necessary.

Financial Impact

The financial impact of (\$542,150.00) will be covered by State Transit Assistance (STA), Federal Transit Administration (FTA) 5307 and State of Good Repair funds. These funding sources are included in the Board-approved capital budget.

Performance Goal

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

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



INVITATION FOR BID
SECURITY FENCE UPGRADE
25-003

PRICE ANALYSIS

	Inland Hwy July 2025	Three Peaks July 2025	All American Building July 2025	Independent Cost Analysis 5/2024
PlanetBids Lump Sum	\$ 441,501.00	\$ 492,864.00	\$ 508,328.99	NA
	\$ 441,501.00	\$ 492,864.00	\$ 508,328.99	\$ 398,150.00

	Difference	Delta
Difference between Three Peaks and All American Building bids	\$ (15,464.99)	-3.04%
Difference between Three Peaks and Independent Cost Analysis	\$ 94,714.00	19.22%

There was adequate price comparison for the Security Fence Upgrade project since three (3) bidders independently contended for the project. Inland Highway bid was disqualified as they neglected to provide their original bid bond; there were other non-conformances with their bid. Therefore, the 1 year agreement award is based on the lowest and most technically responsive price for the requirements of this project. As a result, Three Peaks Corp is the designated awardee for the Security Fence Upgrade project.

Based upon the above review of the bids along with the May 2024 independent cost analysis, Three Peak's price is considered fair and reasonable and determined to provide the best value to the Agency.

Prepared by: Sara Parrish

Ray Stevens
14-Jul-25

PLANETBID SOLICITATION LIST IFB 25-003 SECURITY FENCE UPGRADE

Company Name	Address	City	State	Zip	Contact Name	Email
All American Building Services	PO Box 802586	Santa Clarita	California	91380	Anthony Innabi	Bids@allamericanrebuild.com
AMEG Enterprises, LLC	1522 Terracina Drive	El Dorado Hills	California	95762	David Baldwin	dsbaldwin@amegllc.com
Arix Inc	26 Muirfield	Trabuco Canyon	California	92679	Hassan Zarrinjoub	hassan.zarrinjoub@gmail.com
Bella Kai Construction	1133 Munt Double Dr.	Big Bear City	California	92314	Luigi Dileria	bellakaiconstruction@gmail.com
Builtall	4712 E 2nd Street #520	Long Beach	California	90803	Tom Madrigal	tom@builtall.com
Certainly Fence Inc	1013 Myrtle Ave	Long Beach	California	90813	Jose Romero	jr.certainlyfence@gmail.com
DASH Construction Company, Inc.	6320 Canoga Ave., Ste 220	Woodland Hills	California	91367	Dariush Shahnavaz	info@dashconstructioncompany.com
Everon	210 W Baywood Ave	Orange	California	92865	Gina Farideh Jalali	faridehjalali@everonsolutions.com
Golden West Fence	20741 Hansen Ave	Nuevo	California	92567	Daniel Martinez	goldenwestfence@gmail.com
HHS Construction, LLC	2042 South Grove Avenue	Ontario	California	91761	Ariel Coria	bids@hhsconstruction.net
Inland Highway Services Corp	971 W 20th St	Upland	California	91784	Joe Budka	inlandhsc@gmail.com
Modern General Contractor, Inc.	10017 Benares Place	Sun Valley	California	91352	Rouben Keshishian	roobo7@yahoo.com
Red Hawk Services Inc.	262 E 1st Street	Perris	California	92570	Scott Moore	scott@redhawkfence.com
Roberson Waite Electric	174 E. Liberty Ave.	Anaheim	California	92801	Will Hernandez	will.hernandez@rwe.us
Build EZR	7109 Gerald Ave	Van Nuys	California	91406	Sean Adasm	Sean@buildezr.com
The Altum Group	44-600 Village Court	Palm Desert	California	92260	Doug Franklin	projects@thealtumgroup.com
Three Peaks Corp.	PO Box 101	Calimesa	California	92320	Erik Simmons	erik@threepeakscorp.com
Valley Cities Gonzales Fence, Inc.	1338 Sixth St.	Norco	California	92860	Dave Gonzales	valleycitiesfence1338@gmail.com
Xcel Fence Inc	910 E Cedar St.	Ontario	California	91761	Victor Palacios	victor@xcelfence.com

Footnote: Bold font indicates companies that submitted bids

SunLine Transit Agency

DATE:	July 23, 2025	ACTION
TO:	Finance/Audit Committee Board of Directors	
FROM:	Walter Watcher, Chief of Capital Projects	
RE:	Award of Contract for Natural Gas (NG) Back-up Generator	

Recommendation

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to execute a contract with the lowest, responsive and responsible bidder, Cora Constructors, Inc. (Cora), for the construction of an emergency natural gas (NG) back-up generator system in the lump sum amount of \$2,377,926.12, in full conformity with the terms and conditions of the solicitation and in a form approved by General Counsel, and authorize the CEO/General Manager, or designee, to exercise up to a ten-percent contingency of \$237,793.00 for a total not-to-exceed project amount of \$2,615,719.12.

Background

The Operations Building, New Liquid Hydrogen Fuel Station, and Maintenance Repair Shop are essential facilities for SunLine Transit Agency (SunLine) ensuring uninterrupted service delivery. These facilities operate seven days a week, up to 24 hours a day, and play a crucial role in coordinating transit operations, maintaining vehicle readiness, and ensuring fuel availability.

In the event of a power outage caused by natural disasters, regional grid issues, or other emergencies, SunLine's ability to provide service and respond to urgent transportation needs would be severely impacted without a reliable backup power source. Therefore, staff identified the need for a natural gas-powered backup generator. This generator would automatically activate and supply sufficient power to sustain essential operations at these three facilities.

On May 27, 2025, staff issued an Invitation for Bid (IFB) Solicitation 26-002 for procurement of an emergency NG back-up generator. The IFB was publicly advertised in a newspaper of general circulation and was posted on SunLine's website.

On July 9, 2025, SunLine received bids from 2 contractors.

Staff reviewed the low bidder's submittal to ensure compliance with the requirements of the IFB. Based on a thorough review, staff recommends awarding a contract to Cora, the

lowest responsive and responsible bidder. The price is found to be fair and reasonable in comparison to the Independent Cost Estimate (ICE) and all bids were received under full and open competition.

In addition to the bid amount, staff also recommends the Board authorize a ten-percent contingency of \$237,793.00 to be utilized in the event of unforeseen circumstances. Such use would be subject to a future change order or amendment to the proposed contract, if necessary.

Financial Impact

The financial impact of \$2,615,719.12 will be covered by State Transit Assistance (STA) and Federal Transit Administration (FTA) 5307 funds. These funding sources are included in the Board-approved capital budget.

Performance Goal

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

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



INVITATION FOR BID
NATURAL GAS BACK-UP GENERATOR
26-002

PRICE ANALYSIS

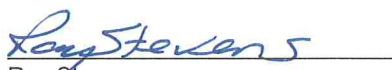
	Cora Constructors July 2025	M Brey Inc July 2025	Independent Cost Analysis 5/2024
PlanetBids Lump Sum	\$ 2,377,926.12	\$ 3,081,921.78	\$ 2,400,000.00
	\$ 2,377,926.12	\$ 3,081,921.78	\$ 2,400,000.00

	Difference	Delta
Difference between Cora Constructors and Independent Cost Estimate	\$ (22,073.88)	-0.93%
Difference between MBE and Cora Constructors	\$ (703,995.66)	-29.61%

There was adequate price comparison for the Natural Gas Back-up Generator project since two (2) bidders independently contended and a May 2024 budgetary cost estimate had been prepared. The lowest bid is .93% lower than the May 2024 independent cost estimate and 29.61% lower than the bid from M Brey Inc. The 2 year agreement award is based on the lowest and most technically responsive price for the requirements of this project. As a result, Cora Constructors Inc. is the designated awardee for the Back-up Generator project.

Based upon review of the bids and the independent cost analysis, the above analysis of Cora Constructor's price represents a fair and reasonable price and is determined to be the best value to the Agency.

Prepared by: Sara Parrish


Ray Stevens
11-Jul-25

PLANETBID SOLICITATION LIST IFB 26-002 NATURAL GAS (NG) BACK-UP GENERATOR

Company Name	Address	City	State	Zip	Contact Name	Email
Baker Electric & Renewables LLC	1298 Pacific Oaks Place	Escondido	California	92029	M Rogers	mrogers@baker-electric.com
Blue Group LLC	1846 1st St #1006	Idaho Falls	California	83401	Doug Anderson	doug@civicbridges.com
CNC Builders, Inc.	751 S. Weir Canyon Rd., Ste 157-240	Anaheim	California	92808	Louis Kloss	louis@cncbuildersinc.com
Collicutt Energy Services	2929 Unicorn Road	Bakersfield	California	93308	Brandon Lancaster	brandon.lancaster@collicutt.com
Cora Constructors Inc	75140 St. Charles Place Ste A	Palm Desert	California	92211	Lynne Cazeault	lynne@coraconstructors.com
Cummins IGB	500 Jackson Street	Irvine	California	92606	Augusto Tubino	augusto.tubino@cummins.com
Eco Energy Solutions, Inc.	4485 Runway Street	Simi Valley	California	93063	Karo Gyonjyan	karo@highvoltelectric.com
Fueling And Service Technologies, Inc.	11310 Slater Ave	Fountain Valley	California	92708	Ross James	rjames@fastechus.com
Johnson-Peltier Electrical	12021 Shoemaker Ave	Santa Fe Springs	California	90670	Greg Kelley	gkelley@johnson-peltier.com
Kewo Engineering Corporation	1370 Valley Vista Drive, Suite 200 #2114	Diamond bar	California	91765	Brian Kewo	brian.kewo@kewocorp.com
Leddy Power Systems, Inc.	530 Los Angeles Ave. Suite 115-145	Moorpark	California	93021	Curtis Leddy	curt.leddy@leddypower.com
Lotus USA Inc	445 S. Figueroa St 31st FL STE 3121	Los Angeles	California	90071	Prasad Yalamanchi	sivaprasad@lotususainc.com
M. Brey, Inc	408 Elm Ave	Beaumont	California	92223	Steven Brey	matt@mbreyinc.com
Nickolas Steel, Inc	816 S. Cucamonga Ave.	Ontario	California	91761	Bobby Powell	bobby@nicksteelinc.com
Proterra Builders, Inc.	16470 Pauhasca Place	Apple Valley	California	92307	Steven Richardson	steven.richardson@proterrabuilders.com
Quinn Power Systems (CATERPILLAR)	3500 Shepherd Drive	City of Industry	California	90601	John Castro	john.castro@quinnpower.com
San Diego Power LLC	2710 Alpine Blvd STE O PMB 514	Alpine	California	91901	Anel Califano	acalifano@sandiegopower.com
Three Peaks Corp.	PO BOX 101	Calimesa	California	92320	Erik Simmons	erik@threepeakscorp.com
Westcon Construction	81149 Indio Blvd	Indio	California	92201	Mark Faessel	mark@westcon-inc.com

Footnote: Bold font indicates companies that submitted bids

SunLine Transit Agency

DATE:	July 23, 2025	ACTION
TO:	Finance and Audit Committee Board of Directors	
FROM:	Walter Watcher, Chief of Capital Projects	
RE:	Submit Request to the County of Riverside to Vacate Haskell Road and Remove Easements	

Recommendation

Recommend that the Board of Directors (Board) authorize the CEO/General Manager, or designee, to:

1. Execute all documents necessary to submit an application to the County of Riverside to vacate a portion of Haskell Road, west of Harry Oliver Trail, and the removal of associated easements.
2. Accept the vacation of the subject area from the County of Riverside.
3. Execute any and all documents to (1) convey easements as necessary once the vacation has been completed; (2) facilitate the removal of unnecessary easements that are recorded on SunLine's parcels.
4. Accept quitclaim deeds or other instruments to facilitate the removal of easements from easement holders.
5. Take any additional actions to support the future merger of SunLine's parcel numbers.

These current and future actions are critical to establishing a contiguous property that will enhance internal mobility, improve operational efficiency and support the development of a cohesive and secure facility. A unified parcel will enable more streamlined facility planning and management, aligning with the SunLine Transit Agency's (SunLine) long-term goals.

Background

Upon Board approval, staff will formally request that the County of Riverside abandon the portion of Haskell Road located west of Harry Oliver Trail. This segment of roadway is no longer in use and currently separates two parcels owned by SunLine. Its continued presence creates logistical and planning challenges, hindering cohesive development of the area for future operational needs. Abandoning this portion of Haskell Road will allow for greater flexibility in site planning, reduce development costs, promote more efficient

land use, and support the development of a unified, secure, and strategically aligned facility footprint.

The road segment does not currently serve a significant public transportation or traffic function. It carries minimal through traffic and primarily serves internal operational needs of SunLine. Alternative public access routes already exist in the surrounding road network, including Harry Oliver Trail and other adjacent streets. If necessary, SunLine is willing to grant access rights to the neighboring parcel owner (in a form of easement or license to be negotiated by the parties) for continued use of the private road if the street vacation is approved. SunLine may also convey utility easements to preserve existing utilities in the street as required by the County or local agencies.

As part of this process, staff will review and initiate the removal of outdated or unnecessary easements on SunLine parcels. These legacy easements can restrict development, limit design flexibility, and create unnecessary complications during site improvements or infrastructure upgrades. Eliminating these encumbrances will help ensure parcels are fully available for future use, supporting efficient land use planning and maximizing the utility of SunLine's property assets.

Financial Impact

There is no notable financial impact at this time separate from County fees for pursuing this action. The Board approved FY 2025-26 Budget should include sufficient capacity to absorb these fees, which are expected to be low enough to fall within the CEO/General Manager's signing authority.

Performance Goal

Goal 2: Highly Trusted Mobility Solutions – Strive to deliver highly accessible, convenient and trusted mobility solutions that effectively meet the diverse needs of Coachella Valley citizens and improve their connectivity to daily life needs.

In Collaboration with:

Paul Mattern, Chief Planning 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 11a](#) - Haskell Road Satellite Map
- [Item 11b](#) - Haskell Road Map – West of Harry Oliver Trail





Sunline Property

Sunline Property

Haskell Road

Harry Oliver Trail

Harry Oliver Trail

SunLine Transit Agency

DATE:	July 23, 2025	ACTION
TO:	Board Operations Committee Board of Directors	
FROM:	Walter Watcher, Chief of Capital Projects	
RE:	Adopt Real Property Policy	

Recommendation

Recommend that the Board of Directors (Board) adopt a Real Property Policy, which sets out the policy of the SunLine Transit Agency (SunLine) with respect to the acquisition, use, and disposal of real property.

Background

SunLine does not have a policy in place setting out the requirements for acquisition, use, and disposal of real property. The Policy, attached, includes a delegation of authority to the CEO/General Manager per the following:

- For Acquisitions:
 - The CEO/General Manager is authorized to acquire real property or real property rights (including easements) for a negotiated price or other consideration to be provided by SunLine valued at \$250,000 or less.
 - The Board of Directors shall approve any acquisition of real property or real property right that will result in SunLine providing consideration in excess of \$250,000.
- For Dispositions (Sales):
 - All dispositions (sales) of real property in fee simple must be approved by the Board.
 - The CEO/General Manager may dispose of easement rights valued at an amount up to \$250,000. The Board will approve disposition of easements valued over \$250,000.
- For Leases or Other Temporary Property Rights Agreements:
 - The CEO/General Manager may execute leases and other temporary property rights agreements (including rights of entry, licenses, etc.) valued at an amount up to \$250,000. The Board will approve disposition of leases and other temporary property rights agreements valued over \$250,000.

The authority granted by the Policy is limited as follows: (a) the funds for any purchase of property must be available in a Board-approved annual or project budget; (b) each

purchase transaction must be supported by a current appraisal or other form of valuation as approved by the CEO/General Manager or designee; (c) an offer may be made or accepted under this delegation of authority only after staff finds that the transaction is in the best interest of SunLine and General Counsel advises that the transaction can be completed as proposed under applicable laws and regulations.

The Policy also provides that the CEO/General Manager shall provide quarterly updates to the Board on transactions entered into pursuant to the Policy. There are currently one or less real property transactions per year.

Financial Impact

There is no financial impact.

Performance Goal

Goal 4: Valuable Community Asset – Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley.

Approved/Reviewed by:

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

Attachments:

- [Item 12a](#) – Real Property Policy
- [Item 12b](#) – Resolution No. 0815

SunLine Transit Agency
Policies & Procedures
Real Property Policy
Policy No: B-180125

Adopted: 7/23/2025

REAL PROPERTY POLICY

Section 1. General

1.1. **Administration.** This Real Property Policy sets out the policy of the SunLine Transit Agency (“**SunLine**”) with respect to the acquisition, use, and disposal of real property. This Policy will be administered by the CEO/General Manager of SunLine or their designee (“**CEO/General Manager**”) and is intended to be liberally construed to effectuate SunLine’s Board of Directors (“**Board**”) intent behind the delegations of authority included in this Policy.

1.2. **Acquisitions.** SunLine will acquire rights in real property for the construction, operation, and maintenance of SunLine’s facilities in accordance with Section 2 of this Policy. Acquisitions of real property for the purpose of investments shall require approval of the Board.

1.3. **Temporary Property Uses.** SunLine may enter into agreements to lease real property, when appropriate. SunLine may also enter into entry permits, licenses, joint use and similar agreements for SunLine purposes or for approved uses of SunLine real properties. Leases, entry permits, licenses, joint use and similar agreements may be approved by the CEO/General Manager for a negotiated price or other consideration to be provided by SunLine valued at \$250,000 or less. The Board will approve any leases or temporary property rights in excess of \$250,000.

1.4. **California Environmental Quality Act.** SunLine shall at all times comply with the California Environmental Quality Act (“**CEQA**”) in entering into any real property transaction. SunLine shall require all third party users of SunLine’s real property to pay all costs relating to CEQA compliance, and to indemnify, defend, and hold SunLine harmless from any and all claims arising out of or relating to CEQA compliance for that third party’s use or proposed use unless there is a justifiable business reason, in the opinion of the CEO/General Manager, for SunLine to waive such requirements.

1.5. **Compliance with Surplus Land Act.** As required by applicable state law, prior to any action being taken to dispose (sell) of all or a portion of a parcel of land owned by SunLine, the Board shall designate the land as either “Surplus Land” or “Exempt Surplus Land” consistent with the Surplus Land Act.

1.6. **Limitations.** The exercise of authorities granted by this Policy will be limited as follows: (a) the funds for any purchase of property must be available in a Board-approved annual or project budget; (b) each purchase transaction must be supported by a current appraisal or other form of valuation as approved by the CEO/General Manager or designee; (c) an offer may be made or accepted under this delegation of authority only after staff finds that the transaction is in the best interest of SunLine and General Counsel advises that the transaction can be completed as proposed under applicable laws and regulations.

1.7. Authorization; Reporting. This Policy authorizes the CEO/General Manager, or designee, to take all actions necessary to consummate and record (if appropriate) documents to effectuate the transactions described herein, including executing agreements and other documents in forms acceptable to General Counsel. The CEO/General Manager, or designee, shall provide quarterly updates to the Board on transactions entered into pursuant to this Policy.

Section 2. Acquisition of Property

2.1. SunLine may acquire real property and real property rights for operational purposes through donations by land owners or developers, negotiated purchase agreements, and eminent domain.

(i) Easements Conveyed by Deed or Agreement

(A) SunLine may convey or accept easements on a form of easement agreement as approved by SunLine's General Counsel. To accept an easement, SunLine shall prepare and attach a certificate of acceptance signed by SunLine's CEO/General Manager or Secretary.

(B) From time to time, SunLine's standard form of easement may not be the suitable conveyance instrument for transferring easements to SunLine (e.g. acquisition of an easement or right of way from a railroad or electric utility). The CEO/General Manager may, as they deem appropriate, accept another form or type of conveyance.

2.2. CEO/General Manager's Authority. The CEO/General Manager is authorized to acquire real property or real property rights (including easements) by signing a Certificate of Acceptance or other document, for a negotiated price or other consideration to be provided by SunLine valued at \$250,000 or less. The Board of Directors shall approve any acquisition of real property or real property right that will result in SunLine providing consideration in excess of \$250,000.

2.3. Due Diligence. SunLine will conduct all due diligence necessary to evaluate the physical, environmental, title, and other conditions of target properties. SunLine may require that, at a minimum, a satisfactory Phase I Environmental Site Assessment, or comparable evaluation, be completed prior to acquiring a real property interest and will request legal counsel review when deemed appropriate.

Section 3. Dispositions (Sales) of Real Property Interests

3.1. Disposition of Real Property. After the Board designates a parcel of land owned by SunLine in fee simple as either Surplus Land or Exempt Surplus Land, SunLine may use or dispose of the real property for valuable consideration in accordance with the Surplus Land Act and any other applicable law.

3.2. Board Approval for Dispositions. The Board shall authorize all dispositions of real property.

3.3. Easements; CEO/General Manager's Authority. The Board shall authorize the conveyance of easements to a third party valued in excess of \$250,000. The CEO/General Manager may approve the conveyance of easements valued at \$250,000 or less.

3.4. Easements Replaced or No Longer Needed. If an easement is no longer necessary for SunLine's purposes or is replaced by a substitute easement, SunLine may quitclaim that easement to the owner of record upon request or SunLine's initiative. The CEO/General Manager is authorized to execute a quitclaim deed or equivalent instrument to the owner of record for the purposes of this section.

SUNLINE TRANSIT AGENCY

RESOLUTION NO. 0815

**A RESOLUTION OF THE BOARD OF DIRECTORS
OF
SUNLINE TRANSIT AGENCY
ADOPTING A REAL PROPERTY POLICY**

WHEREAS, from time to time the SunLine Transit Agency (SunLine) acquires and disposes of real property and property rights for operational purposes; and

WHEREAS, the Board of Directors desires to adopt a policy setting out the requirements for the acquisition, use, and disposal of real property.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of SunLine Transit Agency adopts the attached Real Property Policy No. B-180125. The Policy is effective as of the date of its adoption.

PASSED, APPROVED AND ADOPTED by the Board of Directors of SunLine Transit Agency on this 23rd day of July, 2025, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

Vanessa Ordorica
Clerk of the Board
SunLine Transit Agency

Lynn Mallotto
Chairperson of the Board
SunLine Transit Agency

APPROVED AS TO FORM

Catherine Groves
General Counsel

**SunLine Transit Agency
SunLine Services Group**

DATE:	July 23, 2025	DISCUSSION
TO:	Board of Directors	
FROM:	Greg Wildman, Chief of Strategic Alignment	
RE:	Receive Update on the Fiscal Year 2024-25 Goals, Strategic Objectives and Priorities and Provide Feedback	

Recommendation

Recommend that the Board of Directors receive the year end update on the SunLine Transit Agency (SunLine) Fiscal Year (FY) 2024-25 Goals, Strategic Objectives and Priorities (FY 2024-25 Goals) and provide feedback as appropriate.

Background

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

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

1. Workforce Investment: Facilitate a healthy workforce and ensure that they are adequately supported and equipped with the knowledge, expertise and experience to meet SunLine's operational requirements as they evolve and grow over time.
2. Highly Trusted Mobility Solutions: Strive to deliver highly accessible, convenient and trusted mobility solutions that effectively meet the diverse needs of Coachella Valley citizens and improve their connectivity to daily life needs.
3. Organizational Health and Resiliency: Optimize SunLine's fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).
4. Valuable Community Asset: Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley.

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

An update on staff's progress made on the Strategic Plan through to December 2024 was presented at the December Board of Directors meeting.

This year-end update details staff progress made on the Strategic Plan to-date toward achieving the goals, strategic objectives and priorities defined in the FY 2024-25 Goals. Progress is noted under the section, **Progress Update: July 2025**, as bullets and under each goal and/or objective in Attachment 14a to this report.

Financial Impact

No financial impact.

Performance Goal

Goal 4: Valuable Community Asset – Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley.

In Collaboration with:

Executive Team

Approved/Reviewed by:

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

Attachment:

- [Item 13a](#) – FY 2024-25 SunLine Goals, Strategic Objectives and Priorities

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

GOAL 1: WORKFORCE INVESTMENT – Facilitate a healthy workforce and ensure that they are adequately supported and equipped with the knowledge, expertise and experience to meet the Agency’s operational requirements as they evolve and grow over time.		
STRATEGIC OBJECTIVES		PRIORITIES
A	Establish a formal training program for fleet maintenance staff	i. Partner with the College of the Desert (COD), California Transit Works (CTW), and the Amalgamated Transit Union (ATU) on a multi-faceted training program that also includes an apprenticeship program.
Progress Update: July 2025		
<ul style="list-style-type: none"> The \$75,000 pass-through grant agreement between SunLine Transit Agency and ATU was fully executed on April 10, 2025. The committee responsible for bringing this project to fruition, comprised of ATU representatives and members, and STA management, was engaged in preparatory work throughout 2024, including a retreat to the Bay Area to develop knowledge and understanding of program content and structure from other transit agency programs that have been fully implemented. The committee continues to meet monthly and work toward achieving the project goals, including the selection of the program name, ATLAS (ATU & SunLine Learning and Skills), and selection of the Mentor Coordinator, whose role is to recruit, train and support qualified mentors from within the organization, and facilitate the connection between mentors and mentees. The committee will again be convening in the Bay Area the third week of July 2025 to facilitate team building and group dynamics, as well as participate in more in-depth examination of programs already in effect at three transit agencies: AC Transit, SamTrans, and SJRTD. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> The ATU offered a pass-through grant of \$75,000 to fund the development of a mentor program for bus operators and mechanics, which would be the foundation for apprenticeship programs for both classifications. SunLine executed the grant agreement, and it is now being finalized with the ATU. A participation agreement was executed with CTW on October 23rd. CTW will facilitate coordination between SunLine, the ATU, College of the Desert and other stakeholders for establishing the mentor and apprenticeship programs. 		
B	Establish a formal training program for fleet maintenance staff	i. Partner with the California Transit Training Consortium (CTTC), the College of the Desert, and/or other training partners (e.g., OEMs, CTW, etc.) to establish formal curriculum on zero emission fleet and facility maintenance, operation, and safety.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine executed an agreement with CTTC in March 2025. Work is anticipated to be completed by April 2026. CTTC is in final review stage of the curriculum for the first computer-based “Electrical Fundamentals” course with rollout for the course occurring in August 2025. CTTC is currently in the draft stages of curriculum development for the instructor-led course, “Electrical Circuit Diagnosis” course. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine executed a contract with ZEB Tech Hall on October 30th, who is a proven consulting firm in building zero emission vehicle (ZEV) training curriculum. They will develop most, if not all, of the curriculum that will feed into the mentor and apprenticeship programs being built with the ATU and CTW. They will also coordinate with the College of the Desert and maintenance staff to potentially obtain accreditation of SunLine's training program. 		
B	Establish a formal training program for fleet maintenance staff	ii. Continue to pursue workforce development funds to support staff investment.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff continues researching workforce development funding and will be including workforce development as a component of Bus and Bus Facilities and Low or No Emission grant submittals in July 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> In addition to obtaining funds through the ATU, staff is working with advocates at the State and federal levels to seek funding for SunLine and CTTC. CTTC's focus is to develop standardized ZEV training curriculum that can be used by SunLine to train mechanics. 		
B	Establish a formal training program for fleet maintenance staff	iii. Work with staff to identify training equipment and resources necessary for increasing training effectiveness onsite.
Progress Update: July 2025		
<ul style="list-style-type: none"> The engineering firm for the workforce development building was placed under contract in June 2025. Engineering plans are scheduled to be completed by March 2026. Scope of work documents for the workforce development building engineering and permitting effort are complete and in final review. Engineering firm under contract in June 2025. Work continues on identifying training aids, and acquisition will coincide with building construction. Staff continues work to identify resources while developing the multi-faceted training program. Superintendent of Zero Emissions Technology is developing curriculum and methodology to objectively assess and test C-level mechanics competency to advance to B-level within 90 days of employment. Staff is working collaboratively with the CTTC to identify required training modules. The first in a series of training courses developed by CTTC in conformance with Grant Agreement # ARV-21-070-01 is expected to launch online in August 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff is working collaboratively with the CTTC to identify required training modules. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

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

C	Build the leadership capacity of the Executive Team	i. Coach and support staff on making strategic decisions independently.
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Progress Update: July 2025

- SunLine collaborated with COD to develop and launch the "Visionary Leaders" training program. All chiefs participated in the program, which was completed in January 2025. The program was designed to foster and promote the Chiefs' abilities to think and act strategically and independently, assess risk, determine best practices, and advance the Agency's strategic goals and objectives.
- SunLine University created and launched an online Supervisor training program to elevate the skills of supervisors and managers to improve managerial competency. The program consisted of three trimesters with a total of 32 hours focusing on the fundamental skills of supervision and management. Roundtable presentations were presented monthly where small group presentations reinforced learning and the application of the concepts. The program concluded in January 2025.
- SunLine University continued to offer instructor-led training on more advanced management concepts, to include, Building Bridges: The Essential Role of Trust in the Workplace, Tools and Techniques for Root-Cause Analysis, and Motivational Leadership. Online management training continues monthly with content provided through the Lorman online learning platform.
- Human Resources and Labor Relations developed and implemented a comprehensive labor relations strategy to centralize and standardize administrative process and procedures to increase the cohesiveness labor relations practices across the agency.
- Insight Strategies' continued work with executive leadership and management culminated in the presentation and adoption of the FY26 Strategic Plan by the Board of Directors.
- Goal Cascading workshops have been conducted to develop and incorporate departmental and individual goals to support the achievement of the Strategic Plan.

Progress Update: December 2024

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

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

C	Build the leadership capacity of the Executive Team	ii. Provide coaching by external consultants/formal executives to support leadership growth.
Progress Update: July 2025		
<ul style="list-style-type: none"> Individualized and one-on-one leadership coaching provided through Insight Strategies beginning in May 2025 for the Chief Financial Officer and Chief Transportation Officer. Focus areas are communication, emotional intelligence, decision-making, delegation and strategic thinking. Coaching is ongoing. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> In addition to support from Insight Strategies, coaching/mentoring consultant services have been secured to support the implementation of SunLine's strategic goals, objectives and priorities, primarily in the marketing, maintenance, operations, planning and legislative affairs areas. 		
C	Build the leadership capacity of the Executive Team	iii. Utilize Insight Strategies to support strategic thinking efforts.
Progress Update: July 2025		
<ul style="list-style-type: none"> Process continues. See Goal 1, subpart C. i, above. Insight Strategies is currently supporting the development and implementation of a comprehensive performance management system. This new system will focus on the achievement of organizational, departmental and individual goals, as well as demonstration and application of leadership competencies and skills. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> In progress. See Goal 1, subpart C. i above. 		
C	Build the leadership capacity of the Executive Team	vi. Point staff to industry training and networking opportunities.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff attended several conferences, training opportunities and networking events throughout the latter half of FY 25. CFO training and networking efforts: Mobility 21 Legislative Reception (February 2025), APTA CEO Conference (March 2025), APTA Legislative Conference (May 2025). 		
Progress Update: December 2024		
<ul style="list-style-type: none"> In progress; training details may be found in the monthly GM Report in the Board of Directors Packets. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

D	Conduct organizational assessment(s) to identify areas for improvement and prioritize training investments	i. Continue work with Insight Strategies to survey employees to understand their professional needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> • Town Hall meetings were conducted beginning in December 2024 and in July 2025. • Operations and Maintenance established scheduled events with staff throughout the year to increase and improve communication amongst and between all levels of staff within the agency. • The information gathered during the Voice of the Employee survey process served as a foundation of the development of the FY26 Strategic Plan, and its associated Strategic Priorities and Goals. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Insight Strategies has completed an employee survey, employee focus group discussions, and interviews with leadership. The CEO/GM and staff will be organizing town hall meetings with staff in various departments starting in December 2024 to report out on the survey results, which will be used to shape SunLine's updated strategic plan. The strategic plan will then be used as a basis for the upcoming fiscal year budgets. 		
D	Conduct organizational assessment(s) to identify areas for improvement and prioritize training investments	ii. Work with executive leaders and mid-managers on strategies and actions to implement organization-wide training programs.
Progress Update: July 2025		
<ul style="list-style-type: none"> • See Goal 1, subpart C. i, above. • Hanson Bridgett conducted an on-site specialized harassment training for all levels of management. • Implemented a comprehensive, agency-wide crisis awareness and de-escalation training program that began in May 2025 and represents a critical step in aligning with the Federal Transit Administration's (FTA) General Directive 24-1, which mandates proactive measures to address the rising threat of assaults on transit workers. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Almost all of SunLine's Department Chiefs are completing a leadership training program through the College of the Desert. • Mid-managers and supervisors throughout the organization are completing supervisor training. • The Chief Maintenance Officer is working with SunLine's Safety and Training department to ensure all mechanics get their Class B licenses, which are necessary for performing the full range of their jobs. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

E	Create career ladders/pathways for staff to grow and improve competitiveness for promotions	i. Continue training offerings through SunLine University.
Progress Update: July 2025		
<ul style="list-style-type: none"> • See Goal 1, subpart C. i, above. • Two staff in the Capital Projects Department are enrolled in the Project Management Institute's program leading to certifications in project management. • HR Manager received Transit Paratransit Management Certificate on May 15, 2025 from the University of the Pacific. • Finance staff attended grant training courses, Government Finance Officers Association (GFOA) conference, audit workshop and updates. • Promoted internal collaboration with departments to address labor relations issues and promote adherence to performance expectation. • SunLine contracted with the ADA Guru to provide training in June 2025 for agency staff regarding ADA compliance, wheelchair securement, and other topics important to dispatchers, trainers, and operators. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Ongoing 		
E	Create career ladders/pathways for staff to grow and improve competitiveness for promotions	ii. Build training opportunities, as appropriate and as resources allow, into employee work plans.
Progress Update: July 2025		
<ul style="list-style-type: none"> • SunLine University, in collaboration with Operations Management, developed a 10-hour training curriculum for both fixed route and paratransit controllers to strengthen their skills and abilities for decision-making, communication, and writing skills. The program is designed to provide the controllers the necessary skills to support professional growth and advancement into supervisory and management role. Training program began on July 1, 2025. • SunLine selected PerformYard as its new performance management platform. Career development is built into the platform framework for each employee, and training initiatives and expectations will be identified and built into each employee's performance profile beginning in 2026. • SunLine's Board Clerk and Senior Administrative Assistant in the Clerk's Office completed the necessary requirements for notary certification, and on July 15th, they were informed that they had successfully passed the written examination required for notary 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

commissioning. Next steps include completing a background check and the Oath of Office via the County. This is a huge benefit to SunLine to have in-house notary services.		
Progress Update: December 2024		
<ul style="list-style-type: none"> The apprenticeship and mentor programs will create opportunities for SunLine's front line operators and mechanics to earn college credits as they train for their positions, as well as better define opportunities for growth and promotion. Leadership and key technical staff (i.e. staff conducting DMV Examiner testing for Class B licenses, drug/alcohol reasonable suspicion evaluations) are highly encouraged and/or required to attend industry training and networking opportunities as part of their work plans and as resources allow in the budget. Attending these activities builds expertise, maintains current knowledge of industry issues, strengthens creativity and efficiency in problem solving, and/or meets legal or regulatory requirements. 		
F	Secure and expand technical capacity and expertise within the agency	i. Continue to recruit and hire individuals with the necessary talent and expertise.
Progress Update: July 2025		
<ul style="list-style-type: none"> Human Resources successfully hired a Deputy Chief of Maintenance, a long-term vacancy. Partnered with professional recruitment firms (e.g., KL2 Connect) to identify and attract candidates for hard-to-fill executive and technical positions. SunLine coordinated/ participated in 6 on-site hiring events for Operators, as well as job fairs, community college outreach events, and workforce development programs to build a diverse candidate pipeline. Eight drivers were hired from these events. Established and strengthened community partnerships (e.g., with Desert Best Friend's Closet, DBFC, and local workforce agency) to promote employment pathways and access for underrepresented groups. The agency has assisted DBFC with situational assessments, where DBFC clients are provided work tasks and assignments, and then evaluated on their performance to determine work readiness. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff continues to hire individuals thoughtfully with the necessary skills to deliver projects and programs to maintain and enhance service delivery. Staff is developing mentorship programs for bus operators and mechanics which will better support the professional and emotional needs of new employees. In addition, mentorship programs frequently strengthen professional bonds/relationships, which improve retention, morale and skill levels as peers train, teach and exchange information with each other. Currently, the two hardest jobs to fill are operator and mechanic positions. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

- Staff continues to explore retention strategies including alternative work schedules, child care support services through Tootris, professional growth training and networking opportunities through programs like Latinos in Transit and Women's Transportation Seminar (WTS), etc.
- SunLine completed and implemented a compensation study (Board of Directors adopted in July 2024) to ensure competitiveness in salaries and benefits to support talent recruitment and retention.

F	Secure and expand technical capacity and expertise within the agency	ii. Consider establishing and implementing a procedure to better evaluate and reward performance.
Progress Update: July 2025		
<ul style="list-style-type: none"> • SunLine began working on a Performance Management Renovation project with Insight Strategies in March 2025. The multi-disciplinary goal team reviewed several online performance management programs and selected PerformYard as the agency's new performance management platform. The goal team has established the baseline performance management framework, content, ratings and competencies to be used to populate PerformYard. • SunLine established the initial framework for other performance management tools, including a standardized format and process for developing Performance Improvement Plans (PIP) and employee development plans. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Staff is updating the performance review process and assisting individuals with developing clear work plans with measurable action items. 		

GOAL 2: HIGHLY TRUSTED MOBILITY SOLUTIONS – Strive to deliver highly accessible, convenient and trusted mobility solutions that effectively meet the diverse needs of Coachella Valley citizens and improve their connectivity to daily life needs.		
STRATEGIC OBJECTIVES		PRIORITIES
A	Maximize system safety to include physical and operational security and overall resilience	i. Establish a strategic plan for better defining actions and priorities that maximize system and workplace safety.
Progress Update: July 2025		
<ul style="list-style-type: none"> • 100% of active fixed route fleet equipped with bus barriers as of March 2025. • SunLine, in collaboration with CalHill Swift, conducted Reasonable Suspicion Drug and Alcohol Training for agency supervisors on October 31, 2024. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> Throughout FY25, the Safety Department worked with local jurisdictions (i.e. Sheriff's Office) to enforce the local ordinance 602 regarding loitering and trespassing at bus stops, substantially reducing occupation of the bus stops by the unhoused. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff is taking the updated Public Transportation Agency Safety Plan (PTASP) to the Board of Directors for approval in December 2024. 		
A	Maximize system safety to include physical and operational security and overall resilience	ii. Ensure that executive management proactively engages employees and works to keep communication lines open.
Progress Update: July 2025		
<ul style="list-style-type: none"> The Operations Department is now conducting quarterly Snack Talks, where executive team members engage in meaningful conversations with operators, while sharing knowledge and updates. These Snack Talks provide open lines of communication to ensure line staff are made aware of important agency information. As part of the investigation process, representatives from the HR and Safety departments now interview each employee who submits an incident report alleging work-related injury. The intent is to identify the root-cause of the event to determine preventability and ensure remediation of hazardous conditions in the workplace. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Development and implementation of a quarterly "Snack Talk"- a program that encourages positive interaction and communication between the executive team and front line employees in Operations. (December 2024). An RFP for an employee engagement application ("app") will be issued soon to acquire a phone app to better communicate with all employees, especially those without SunLine email accounts. The Chief Maintenance Officer instituted monthly shop meetings to inform maintenance employees of SunLine's mission, goals, priorities, events, and celebrations. 		
A	Maximize system safety to include physical and operational security and overall resilience	iii. Provide fuel type and bus familiarization training to local fire departments to improve response time for potential thermal events.
Progress Update: July 2025		
<ul style="list-style-type: none"> The Safety Department conducted a walk-through of the Indio facility fueling infrastructure with the Indio Fire Department. The walk-through covered emergency shutdown procedures for the property and offered an opportunity to extend the training to other areas, such as the hydrogen infrastructure in Division I, to include emergency response procedures for thermal events on buses. 		

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Progress Update: December 2024		
<ul style="list-style-type: none"> On Tuesday, October 15, 2024, and Friday, October 18, 2024, SunLine in partnership with Nikkiso facilitated training with CalFire. 		
A	Maximize system safety to include physical and operational security and overall resilience	iv. Partner with the Department of Homeland Security (DHS) to conduct an Infrastructure Vulnerability Assessment, which will assist in identifying, deterring, detecting, disrupting, and preparing for threats and hazards.
Progress Update: July 2025		
<ul style="list-style-type: none"> On April 3, 2025, SunLine staff participated in the Rose Bowl Joint SWAT Training Exercise. SunLine established contact with the region's TSA representative, who has agreed to assist in conducting a comprehensive Infrastructure Vulnerability Assessment at SunLine. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> In progress 		
A	Maximize system safety to include physical and operational security and overall resilience	v. Develop training programs for staff that focus on de-escalation techniques and customer service skills.
Progress Update: July 2025		
<ul style="list-style-type: none"> Crisis Awareness and De-escalation training, in accordance with FTA's General Directive 24-1 began on May and continues through to August. Training is provided through Insight Strategies, the funding for which was approved in Committee in March 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> For the month of November, a total of 9 safety meetings will be held focusing on de-escalation techniques. The purpose of the training is to reduce violent acts and injuries, enhance safety, improve communication, build trust, and improve operational efficiency. In addition to de-escalation training, emergency response kits, including stop-bleeding kits with tourniquets, have been installed throughout SunLine. These kits could make the difference between life or death during active assailant situations. They enable immediate action to control severe bleeding, which is often the leading cause of preventable death in such scenarios. Quick access to these tools can significantly increase the chances of survival by stabilizing victims until professional medical help arrives. 		
A	Maximize system safety to include physical and operational security and overall resilience	vi. Invest in new technology to protect patrons, transit agency personnel, and critical assets directly or indirectly at all times.
Progress Update: July 2025		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

- The facility camera upgrade project is underway with anticipated completion to finish in August 2025.
- The legacy two-way radio system in all paratransit and fixed route busses has been replaced with a new cellular based system. This upgrade provides increased range, clarity and reliability of communications, an accessibility.
- Staff in operations, safety, maintenance and stops & zones staff have handheld radio units to facilitate a more expedient response to activation on the bus.
- All fixed route and paratransit vehicles cellular routers have been replaced with upgraded 5g units.
- Replacement of the CAD/AVL system is both paratransit and fixed route vehicles is ongoing. Paratransit vehicles are scheduled for July installation and commissioning, followed by fixed route vehicles in October.
- The project involving the redesign of both North and South guard shack locations was out to bid in May 2025. Bids are due in July. Request for contractor award will be presented to the Board of Directors following confirmation of the winning bid.
- The pavement rehabilitation project is out to bid in July; anticipated presentation to the Board of Directors October 2025.

Progress Update: December 2024

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

A	Maximize system safety to include physical and operational security and overall resilience	vii. Reinforce mitigating actions taken to reduce the likelihood and severity of consequences to individuals and transit agency assets.
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Progress Update: July 2025

- HR, Safety, Maintenance, and Operations established a multi-disciplinary and comprehensive review and root-cause analysis process for reported industrial injuries. The process involves conducting an in-depth interview with employees reporting injuries, regularly scheduled meetings to discuss causation, trends, and to plan mitigation and remediation actions to reduce incidence and severity of injuries. The meetings facilitate communication between the departments to discuss possible root causes, trends, etc. of the claims received.
- Crisis Awareness and De-escalation training all agency employees began on May and continues. Schedule completion of training is August.

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

As of March 17, 2025, the installation of bus barriers across SunLine’s fixed-route fleet is complete—100% of the active Fixed Route fleet is now equipped with protective barriers.		
Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine adopted a Passenger Code of Conduct in July 2024. The ordinance allows SunLine to suspend riding privileges for passengers who persistently violate its provisions, such as damaging property or assaulting transit workers. SunLine staff has been meeting bi-weekly to ensure all internal procedures are developed before the implementation of the ordinance, the tentative roll out date is January 5, 2025. Staff is complying with the Federal Transit Administration’s (FTA) expanded requirements to monitor, track and report on employee assaults during the course of business. This process should build greater awareness of employee assaults and the necessary actions for preventing them, which should work towards preventing/minimizing events and their severity. 		
A	Maximize system safety to include physical and operational security and overall resilience	viii. Implement and/or update fleet and facilities maintenance plans as necessary, and ensure that hydrogen fueling infrastructure and equipment are addressed.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunFuels staff has been working alongside Integrated Cryogenic Solutions (ICS) staff to learn system and equipment maintenance, troubleshooting and repair procedures on the liquid hydrogen fueling station. This process will continue during the three year maintenance and operations period for the new station per the contact with ICS. SunFuels staff have been working closely with Nel Hydrogen & Cavendish staff in continued support of the electrolyzer fueling station. During FY25, the station has maintained and sustained the longest continuous operating state for fueling needs. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Current fueling infrastructure maintenance plans have been uploaded into Hexagon, SunLine’s new asset management system, which has been recently implemented. New LH2 station and electrolyzer plans are currently being incorporated into Hexagon so routine maintenance is completed on schedule. The latest equipment will be uploaded by February 2025. 		
B	Deliver reliable service	i. Create an effective, strategic fleet plan to ensure sufficient vehicles are available for daily pull-out.
Progress Update: July 2025		
<ul style="list-style-type: none"> Liquid hydrogen (LH2) station has passed the contractually required availability test and will soon be undergoing performance testing. Work continues at the LH2 station to pass the State’s HySTEP testing which will allow SunLine to sell hydrogen to the public. Upon passing the tests and inspections final acceptance will occur followed by project closeout. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> The CNG buses acquired in early CY24 have been repainted and upfitted with driver barriers, radio systems, and updated routers. The buses are currently in-service and will be upfitted with the new CAD/AVL systems in October. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> An RFP for a comprehensive operational analysis (COA) will be released within the next month, which will include an analysis of current operations/ridership needs along with recommended system improvements. The associated strategic fleet plan for delivering service will be included in this work. Standard operating procedures (SOPs) are being developed to improve maintenance practices and policies for increasing fleet spares/availability. Construction of the new liquid hydrogen fueling station (Contractors: Dahl Taylor & Nikkiso) was completed late spring 2024 and became SunLine's primary and trusted fueling solution for the hydrogen fuel cell bus (FCB) fleet. CNG buses, purchased from Riverside Transit Agency (RTA) in early CY 2024, are being outfitted for service. These will eventually serve as SunLine's contingency/emergency fleet as hydrogen technology continues to evolve. 		
B	Deliver reliable service	ii. Upgrade Scheduling Software (Trapeze) to increase staff planning and scheduling efficiencies.
Progress Update: July 2025		
<ul style="list-style-type: none"> Upgrade from Trapeze version 15 to 21 was completed on March 8, 2025. The upgrade was necessary because the vendor was no longer supporting v. 15. V21 allows for automated bidding for routes and shifts; expected to make the bidding process more efficient. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> The Trapeze software upgrade from version 15 to 21 is in progress. Testing, training and implementation are scheduled to start in February 2025. 		
B	Deliver reliable service	iii. Implement performance monitoring processes to improve service planning efforts.
Progress Update: July 2025		
<ul style="list-style-type: none"> The Board of Directors awarded a contract to GMV Synchromatics for a new CAD/AVL system. Installation of the new system is scheduled for paratransit vehicles in July 2025 and fixed route in October 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine is now a member of the American Bus Benchmarking Group (ABBG) and required to collect, monitor, interpret and report performance metrics consistent with other member agencies. By benchmarking SunLine's performance against others across the 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<p>industry, staff will be better aware of areas for improvement and work proactively and collaboratively with others to solve operational challenges.</p> <ul style="list-style-type: none"> An RFP for an updated and/or new CAD/AVL system, which will allow SunLine to tighten operational efficiencies, monitor performance more closely, track buses in real time for safety and operational purposes, etc., was released in September 2024. Proposals should be received soon. 		
B	Deliver reliable service	iv. Implement and/or better publicize customer information tools that communicate service availability/status to minimize wait and travel times.
Progress Update: July 2025		
<ul style="list-style-type: none"> The deployment of Swiftly is nearly complete with the installation of new Cradlepoint hardware. Once complete, Swiftly will provide accurate GTFS-RT. Dispatch and customer service staff will use Swiftly to quickly identify bus locations in real time answering or providing information to customers. This is a temporary solution until such time that the GMV CAD/AVL is fully implemented successfully. SunLine has launched Transit Royale, an upgraded aspect of the Transit app, at no cost, to provide expanded information to Coachella Valley residents. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff is currently implementing partnerships with Swiftly and the Transit app to leverage best in class industry tools that will provide real time stop arrival and service interruption information to riders. Expected completion is March 2025. 		
C	Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens	i. Better align SunLine's various services and programs, including fixed route, paratransit, SunRide, and the taxi voucher program to minimize or eliminate mobility gaps and transit deserts in the Valley.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine completed the RFP process to select a consultant to perform the Comprehensive Operational Analysis (COA). Staff selected Jarrett Walker Associates (JWA) and the SunLine Board of Directors approved this selection at the June 2025 Directors meeting. An On Board Ridership survey has been completed. SunLine received the final report in May 2025. The On Board Ridership survey contains demographic and trip data information that will be used for grant applications and long range planning. TMD, a national consulting company, has been working with the new scheduler to train and provide guidance on building efficient operator schedules. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

Progress Update: December 2024		
<ul style="list-style-type: none"> The upcoming COA process will support this objective as different solutions are analyzed and recommended for improving systemwide effectiveness. A ridership survey will be conducted soon and will better inform future decisions on how each of SunLine's modes could be better aligned. Maintaining on-call planning firms “on the bench” will allow SunLine to expand its planning and scheduling capacity when necessary for exploring and/or implementing new, creative service solutions. 		
C	Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens	ii. Complete the Request for Proposals (RFP) process for microtransit (SunRide) services, and establish a service design that will increasingly meet community mobility needs, grow ridership, serve to reduce traffic congestion/harmful air emissions, increase cost and operational efficiencies, and improve competitiveness for grant funds.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine selected VIA to take over microtransit services. VIA began operation March 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> An RFP was released in the fall of 2024 for microtransit (SunRide) services. The current contract with Yellow Cab will expire in March 2025, and proposals are currently being evaluated. A recommendation for contract award will be brought to the Board of Directors in January 2025. Potential transition to a new vendor would occur in April 2025. 		
C	Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens	iii. Identify and explore transit models that complement SunLine’s fixed route system and improve mobility in low density communities.
Progress Update: July 2025		
<ul style="list-style-type: none"> COA to begin August 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> This will be included as part of the COA process, as well as the microtransit (SunRide) solicitation process. 		

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D	Design, plan and implement capital investments that support operating needs	i. Implement an inclusive Capital Investment Planning (CIP) process that understands and supports current needs with an additional focus on long range agency goals.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff identified and requested capital items to be included in the FY 26 capital budget. This list was reviewed and ranked by the Chiefs. The final list was used to build the upcoming capital budget. This process is expected to occur on an annual basis. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> The Chief Planning Officer implemented a Capital Investment Program in collaboration with other department leaders and stakeholders to identify current and future capital needs. Hexagon, SunLine's new asset management software, will further allow staff to monitor both near and long term capital asset maintenance and replacement needs. 		
D	Design, plan and implement capital investments that support operating needs	ii. Continue progress towards completion of SunLine's \$100 million+ capital program that includes fleet replacements, new hydrogen stations in Thousand Palms and Indio, a workforce training center (former West Coast Center of Excellence), utility improvements, a microgrid, replacement of the radio system, upgrade to scheduling software (Trapeze), etc.
Progress Update: July 2025		
<ul style="list-style-type: none"> Eight new Fuel Cell buses were placed in to service by end of calendar year 2024. Additional units will be ordered in FY26 in line with approved capital budgets. Staff provided plans and paid preliminary engineering fees to IID to meet fueling station power requirements for the Indio fueling station. Awaiting preliminary engineering review and contact to bring another circuit to the Indio facility. The Board of Directors awarded a contract for A&E services for the Workforce Training Center. Staff is working with the firm for site plans, building plans and County approval. Bids will be issued upon plan approval. New cellular-based radio system has been fully installed, commissioned and is in use. Staff continues to work with ARCHES in anticipation of receiving funding for upcoming bus purchases and Indio fueling station construction. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Agency priorities have been identified and work has begun on large projects. <ul style="list-style-type: none"> Fleet replacement is underway and will continue in step with new planning documents. Indio utility and fueling station work is underway for completion in 2027. 		

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<ul style="list-style-type: none"> ○ Workforce development building engineering procurement is near release goal is start construction August 2025. ○ Radio system installation will be complete by end of 2024. ● The recent ARCHES grant award will also support replacement of CNG buses with hydrogen fuel cell buses and the potential construction of a third liquid hydrogen station. 		
E	Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors	<ul style="list-style-type: none"> i. Participate in planning efforts with cities, county representatives, and/or regional planners on multi-modal transportation hubs and other mobility programs that serve to reduce single occupancy vehicle trips and traffic congestion.
Progress Update: July 2025		
<ul style="list-style-type: none"> ● The Planning staff continues to meet with area planning departments to stay informed of ongoing projects and sharing upcoming projects at SunLine. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> ● The CFO has increased his participation in regional planning meetings including RCTC, CVAG, CTA, SCAG, legislators and city officials throughout multiple meetings through the first part of FY25. ● The Chief Planning Officer/Planning staff have started engaging with local municipalities to identify opportunities for collaboration on projects and programs to improve travel and access to transit throughout the Valley. 		
E	Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors	<ul style="list-style-type: none"> ii. Participate in Coachella Valley Rail (CV Rail) station area planning efforts as appropriate for maximizing potential, future synergies between rail and bus transit.
Progress Update: July 2025		
<ul style="list-style-type: none"> ● Staff will continue to attend meetings on CV Rail. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> ● Staff are participating in station area planning meetings in Indio and Coachella 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

GOAL 3: ORGANIZATIONAL HEALTH & RESILIENCY – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).		
STRATEGIC OBJECTIVES		PRIORITIES
A	Conduct regular long-range financial planning exercises	i. Develop and annually update a 10-year Budget Outlook that incorporates reserve allocations, capital investments necessary for system safety and reliability, and operating expenses for meeting growing community needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> Substantial progress has been made with the 10-year plan. Revenues and subsidies are being finalized and expenses will be completed to complete the plan by January 2026. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine's Financial Analyst has been tasked with developing an initial 10-year budget outlook. This will eventually inform decisions on the annual fiscal year operating and capital budget process. 		
A	Conduct regular long-range financial planning exercises	ii. Develop an annual budget that aligns with long-term budget projections and known funding resources.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff in Planning, Finance and Capital Projects continue to finalize processes around this. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> The Chief Planning Officer is taking steps to improve the capital planning process. Once a long-term capital and operating/service plan is developed, it will serve as a basis for the 10-year budget outlook for capital and operating expense assumptions. This effort will extend through FY26 where the plan will be completed and will then be used for the FY27 budget process. 		
A	Conduct regular long-range financial planning exercises	iii. Regularly analyze SunLine’s compliance with mandates around farebox recovery ratios and caps in annual cost increases in order to maintain eligibility for TDA and STA funds. (Note: SunLine’s compliance with these mandates are also important for the continued, annual allocation of 10% of STA funds to CV Rail.)
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine remains in compliance with TDA farebox recovery goals, as long as local Measure A funds can still be accessed by SunLine for operating expenses. 		
Progress Update: December 2024		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> Ongoing 		
A	Conduct regular long-range financial planning exercises	iv. Improve SunLine’s Key Performance Indicator (KPI) program to provide a suite of KPIs that aid in long range planning rooted in data.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff in all departments continue to refine appropriate KPIs and monitoring processes to inform long range planning, as well as day-to-day decision making. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Beginning in December 2024, staff will begin building a KPI dataset that incorporates the ABBG data collection and reporting guidelines. These outputs will be accessible to staff for review when making business decisions. 		
B	Regularly review the reserve policy and grow reserves responsibly	i. Continue to allocate a sufficient amount to the SunLine reserve to meet critical needs in the future.
Progress Update: July 2025		
<ul style="list-style-type: none"> The FY26 budget was approved by the Board of Directors which balanced revenues and expenses without utilizing reserves. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Ongoing 		
C	Establish a fare structure that allows SunLine to improve and expand service	i. Conduct a fare payment study and cost recovery analysis.
Progress Update: July 2025		
<ul style="list-style-type: none"> The Board of Directors approved the award of a contract for the COA study at the June 2025 meeting. The contract includes an option for a fare study analysis. However, a fare policy study as part of the COA is an optional item. Staff will seek direction from the Board on the need and timing of a potential fare study analysis. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> This will be included in the COA. 		

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C	Establish a fare structure that allows SunLine to improve and expand service	ii. Take measured steps to amend the fare structure as necessary for the Agency's long term sustainability.
Progress Update: July 2025		
<ul style="list-style-type: none"> A fare policy study is part of the COA as an optional item. The agency will need to decide whether to exercise this option in collaboration with the Board of Directors. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Ongoing and will be considered as part of an upcoming Short Range Transit Planning process. 		
D	Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies	i. Monitor county, state and federal allocations/projections from the Riverside County Transportation Commission (RCTC) and include these in the annual budget and 10-year Budget Outlook.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff continues to monitor allocations and projections from funding partners. These updates have been incorporated from yearly formal updates in public meetings as well as monthly staff updates to funding provide to SunLine's Finance Department. With the assistance of legislative advocacy firms, staff has been supporting the continuation of transit funding at the State and Federal level with programs such as Cap and Trade/ Cap and Invest and the reauthorization/replacement of the IJJA. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Ongoing 		
D	Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies	ii. Monitor decision/actions by the Federal Transit Administration (FTA), California Air Resources Board (CARB), Southern California Association of Governments (SCAG) and other agencies that impact SunLine's long-term sustainability and ability to serve Coachella Valley Communities' evolving mobility needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine successfully met the FTA's required deadline for developing and submitting its risk assessment, which was submitted on December 4, 2024. The following mitigation measures have been fully implemented: 		

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- Driver Barriers
 - De-Escalation Training
 - Policies and Procedures
 - Video Surveillance Systems
 - NTI Assault Awareness and Prevention Training
 - 10-54 Button (Silent Alarm)
 - Future mitigation strategies are also identified as follows:
 - Enhanced De-Escalation Training
 - B.O.L.O. (Be on the look-out) Flyer for Communication
 - Public Awareness Campaign
- The Federal Transit Administration (FTA) has issued a requirement for an update to be submitted to the National Transit Database (NTD) by August 29, 2025. SunLine is currently on track to meet this deadline.
- In conjunction with legislative advocacy firms, SunLine staff constantly monitors key funding and operational decisions made that could impact the Agency.

Progress Update: December 2024

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

D	Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies	iii. Research and pursue competitive grant opportunities and/or earmarks for meeting capital investment, workforce development, safety/security, and service enhancement initiatives.
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Progress Update: July 2025

- SunLine submitted Federal earmark requests for funding related to the replacement of the maintenance facility and for CMAQ funding for expanded solar-covered parking for staff and Agency support vehicles. SunLine will also be submitting grants for the Bus and Bus Facility and Low or No Emission funding opportunity.
- Staff is currently working with the California Department of Transportation to execute the master agreement for TIRCP grant funds for an open loop, contactless payment system while concurrently conducting the procurement process to determine potential vendors. The master agreement must be completed prior to awarding a vendor contract.

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

Progress Update: December 2024		
<ul style="list-style-type: none"> In October, 2024, the State awarded \$612,000 in Transit and Intercity Rail Capital Program (TIRCP) funds to SunLine for a contactless, open loop fare payment system in partnership with the California Integrated Travel Project (Cal-ITP). Staff is soliciting proposals for grant writing support and advocacy services in Sacramento and Washington. 		
D	Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies	iv. Establish and actively manage a state and federal legislative program with engagement from the Board of Directors to advocate for SunLine's needs, as well as to increase awareness of potential financial impacts from new mandates.
Progress Update: July 2025		
<ul style="list-style-type: none"> Through the assistance of legislative advocacy firms, staff has been supporting the continuation of transit funding at the State and Federal level with proposed programs such as Cap and Invest and continued funding levels established by the IJJA. The Board of Directors approved the State and Federal Legislative Program at the March 2025 Directors Meeting. The 2025 state and federal legislative program was finalized and approved by the Board of Directors in March 2025. In June 2025, the Board of Directors was briefed on staff decisions on state and federal advocacy firms to elevate SunLine's visibility and strengthen its voice in Sacramento and Washington, D.C . 		
Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine created a Director of Board and Legislative Affairs position to actively monitor legislative and regulatory activities at the state and federal level, as well as build stronger relationships with local, regional, state and federal representatives. Monthly legislative updates are provided to the Board of Directors during regular meetings. Staff conducted an advocacy trip to Sacramento in August 2024. Staff is presenting a draft Legislative Program to the Board of Directors for discussion in December 2024. 		
E	Strengthen SunLine's technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health	i. Implement new hardware, software and associated O&M processes/procedures for ensuring that SunLine's information technology (IT) and information systems (IS) foundation remains stable, reliable, secure, and capable of meeting evolving operating and reporting needs.
Progress Update: July 2025		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

- Helixstorm delivered the initial assessment to IT staff with a subsequent presentation delivered to the IT Steering Committee last quarter 2025.
- A roadmap of projects to improve network and system performance, increase security posture, focus on cloud based technologies, and simplify systems was developed with focus on server infrastructure, internet high availability, and Entra for Microsoft365 as initial priorities November 2024.
- Helixstorm triaged certain of the initial end user issues related to Exchange Server migration, significantly improving Microsoft application functionality.
- There is an ongoing project migrating employees computers from Windows 10 to Windows 11 to align with the Microsoft requirements; completion expected October 2025.
- Disposed unusable equipment, greatly improving system security.
- New cradle points and antennas had to be installed on the fleet to ensure that bus technology such as radios, CAD/AVL, as well as Swiftly and the Transit App, function properly and accurately. This project started in FY 2025, and it continues into FY 2026.

Progress Update: December 2024

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

E	Strengthen SunLine's technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health		ii. Secure necessary expertise for maintaining SunLine's IT and IS foundation.
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Progress Update: July 2025

- The managed services agreement with Helixstorm was expanded to provide for strategic advisory services.

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> The assigned advisor crafted a development plan for internal IT staff, provided coaching to the staff to report wins, challenges, and blockers in a structured manner as well as establishing IT support and performance metrics. IT independent contractor agreement was extended to enable additional knowledge transfer opportunities. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> SunLine hired Helixstorm to improve SunLine's IT system functions and reliability. 		
E	Strengthen SunLine's technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health	iii. Accumulate a global perspective of SunLine's IT systems and develop a plan to replace equipment and begin the migration of systems to the cloud.
Progress Update: July 2025		
<ul style="list-style-type: none"> Barracuda messaging archival services was migrated to the cloud June 2025. Implemented DNS Filter for employee web filtering (cloud based) increasing system security. Microsoft Entra project in progress and should complete by August 2025; full migration to Microsoft365 for electronic mail, teams, and one drive; RFP for second phase will begin July 2025. Expected completion November 2025. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff is currently exploring and planning the implementation of cloud based systems. Disaster recovery processes are also being prioritized. 		
E	Strengthen SunLine's technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health	iv. Complete implementation of new maintenance/inventory warehouse software, Hexagon Enterprise Asset Management (EAM), and implement new processes to improve inventory efficiency and management of capital assets.
Progress Update: July 2025		
<ul style="list-style-type: none"> Completed May 2024. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Hexagon EAM has been implemented and is currently being utilized by Maintenance and in the inventory warehouse. Additional training in Hexagon is being planned. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

E	Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health	V. Complete outsource of payroll processing to ADP.
Progress Update: July 2025		
<ul style="list-style-type: none"> The transition to ADP occurred in May 2025. Staff continues to implement new ADP features for employees to improve access to information and reporting. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> The project is undergoing final validation and training for go-live crossover to align with the new calendar year and first payment out of ADP projected in January 2025. 		

GOAL 4: VALUABLE COMMUNITY ASSET – Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley		
STRATEGIC OBJECTIVES		PRIORITIES
A	Maintain awareness of local needs	i. Continue public outreach efforts to gather public feedback on mobility needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff continues proactive outreach to established community organizations to schedule presentations and gather feedback. Marketing is expanding travel training efforts to better support and educate the community on using SunLine’s services. The Marketing Department updated collateral materials. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Staff continues to actively reach out to established community organizations to schedule presentations and feedback forums. 		
A	Maintain awareness of local needs	ii. Conduct outreach to local city officials for feedback on local needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine has scheduled meetings and initiated outreach with local elected officials, including members of the state legislative delegation, to gather feedback on community needs and encourage visits to SunLine for a better understanding of transit priorities and operations. See also G2. A. i. 		
Progress Update: December 2024		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> Staff has had regular meetings with officials in various cities related to infrastructure investments (i.e. construction of transit centers), enforcing “No Trespassing” regulation at bus shelters, service needs, clean air/healthy community investments, CV rail planning, etc. Regular meetings with local leaders/policy makers/legislators and/or their staffs to share local transit needs from SunLine’s perspective, and to better understand from them local priorities, available funding and partnership resources, etc. SunLine’s Director of Legislative Affairs has been meeting with local Public Information Officers to establish regular, open lines of communications. 		
A	Maintain awareness of local needs	iii. Conduct ridership surveys.
Progress Update: July 2025		
<p>Staff received training on the Transit app Rate-My-Ride data where we will have access to crowd sourced information about our service, stop infrastructure, and buses. This will be helpful for decision making around service improvements.</p> <ul style="list-style-type: none"> SunLine will implement regular Customer Satisfaction Survey. The next Customer Satisfaction Survey will occur in the spring, usually around April. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Ridership surveys will be conducted continuously using the Transit app survey feature for real time feedback from riders. Annually, SunLine will participate in the ABBG Customer Satisfaction Survey. 		
A	Maintain awareness of local needs	iv. Complete On Board Ridership Survey Study. (Previous survey completed in 2019.)
Progress Update: July 2025		
<ul style="list-style-type: none"> The On Board Ridership Survey was completed. Final report was received May 2025. Next steps are being defined, and a presentation to the Board will be planned before the end of the calendar year. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> On-board rider survey RFP was released in September 2024. Community outreach and survey process should begin by March 2025. 		
A	Maintain awareness of local needs	v. Establish Rider Advocacy/Advisory Committee(s) as appropriate for better understanding ridership needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> Staff is in the process of developing updated by-laws to refresh the current Accessibility Committee that is an advisory committee to the Board for improving collaboration and staff awareness of community needs, ADA issues, as well as other service interests/needs. This 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

process will also include creating the appropriate forums for clearly addressing needs/ interests around paratransit, fixed route, and microtransit in collaboration with community stakeholders.		
Progress Update: December 2024		
<ul style="list-style-type: none"> An existing ACCESS Advisory Committee to the Board continues to meet bimonthly. Although this committee is tasked with looking at the entire SunLine system inclusive of fixed route and paratransit, it is focused primarily on ADA/paratransit related services. An effort is underway to separate the current ACCESS advisory committee into two committees that will focus on fixed route and paratransit separately. 		
B	Communicate on SunLine's organizational health and sustainability	i. Provide regular "state of the agency" presentations and/or reports to key community stakeholders to communicate SunLine's ability to continue to meet local mobility needs.
Progress Update: July 2025		
<ul style="list-style-type: none"> SunLine delivered "state of the agency" presentations to local Rotary clubs and organizations such as Leadership Coachella Valley to increase awareness of SunLine's services and highlight its commitment to meeting local mobility needs. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Plans to create an annual report on SunLine's performance and accomplishments are underway. Delivery is dependent on resource availability. In the meantime, staff will provide regular reports to the Board and/or on the website on Key Performance Indicators (KPIs) and progress made on projects/programs that are critical to SunLine's service reliability, safety, etc. 		
C	Reevaluate SunLine's brand strategies	i. Engage local cities on bus stop investments, public signage and customer amenities to improve public perception and system appeal.
Progress Update: July 2025		
<ul style="list-style-type: none"> The comprehensive operational analysis will assess the Agency's bus stop infrastructure to determine if a fresh look will improve public perception and promote safety. Agency staff maintains ongoing collaboration with the local Sheriff's Department and city policy departments to proactively address areas of concern across the service area. As part of these efforts, staff have renewed and submitted update trespassing authorization forms to the valley's law enforcement agencies. A comprehensive evaluation of system-wide bus stops is underway. This includes the inspection and replacement of No Trespassing signage to ensure visibility, compliance and effectiveness in deterring unauthorized activity. 		
Progress Update: December 2024		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> • “No Trespassing” signs are being installed in SunLine shelters and facilities in collaboration with local municipalities that express interest. This initiative aims to enhance system safety/security, improve system appeal, and improve public perception of SunLine service as a safe mode of transportation. • Staff is exploring new, more appealing street furniture options that could improve rider comfort and complement better the local, desert aesthetic. 		
C	Reevaluate SunLine’s brand strategies	ii. Freshen fleet appearance.
Progress Update: July 2025		
<ul style="list-style-type: none"> • A new paint scheme was selected, but the implementation has been delayed. The agency will be revisiting this project. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Staff is in the process of repainting buses. • A process to detail bus interiors and exteriors is being established. • A new paint scheme is being developed for future bus purchases. 		
D	Strengthen SunLine’s community presence.	i. Complete website update.
Progress Update: July 2025		
<ul style="list-style-type: none"> • SunLine’s new website was launched in July 2025, focusing on brand consistency, enhanced user-friendly design, and full legal compliance to better serve the community and stakeholders. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • A new design is currently underway. The launch date for the new website is still to be determined. • Established a new credit card processing system in September 2024 that is capable of working with the new website. 		
D	Strengthen SunLine’s community presence.	ii. Improve social media presence and response time to public feedback.
Progress Update: December 2024		
<ul style="list-style-type: none"> • Marketing staff has increased the frequency of educational posts across multiple social media platforms and are actively working to improve response times to public feedback to strengthen SunLine’s social media presence. Impressions have increased 38% between January and June 2025. 		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

D	Strengthen SunLine’s community presence.	iii. Continue to build partnerships with local community and advocacy groups with shared interests and missions (e.g., American Heart Association/AHA).
Progress Update: July 2025		
<ul style="list-style-type: none"> Released the EMPOWERED video segment, highlighting SunLine’s commitment to the community and partners through storytelling and awareness-building in the clean energy space. Established partnership with Desert Best Friend’s Closet to host a clothing drive benefiting local residents, reinforcing SunLine’s support for community empowerment and self-sufficiency. Successfully brought back the Pantry to the People food drive after a five-year hiatus, expanding SunLine’s role in addressing food insecurity across the Coachella Valley. Collaborated with Desert Best Friend’s Closet to be a partner in their “Situational Assessment” program. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Established partnership with the AHA in July 2024 and chaired the 2024 Coachella Valley Heart and Stroke Walk. Joint marketing and public awareness campaigns and media events made possible through the partnership. Established partnership with Ophelia Girls/JFK Foundation in September 2024 given mutual interest in equipping the Valley’s youth with life skills for future success. Partnership will allow for joint marketing and awareness campaigns/medial events. SunLine staff will actively work to inform youth of benefits of public transit and clean air technology through mentoring, training workshops, bus pass program, etc. Continue active participation in local organizations such as the Greater Coachella Valley Chamber of Commerce, Coachella Valley Economic Partnership, etc. Continue to participate in community events in member cities. Continue to host public awareness events and programs such as the Annual Student Art Contest. Actively work with marketing/outreach consultants to develop strategic communications plans, advertising campaigns, etc. 		

GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.		
STRATEGIC OBJECTIVES		PRIORITIES
A	Grow the alternative fuels program responsibly	i. Complete a cost-benefit analysis of SunLine’s hydrogen fueling stations to inform staff on the operational efficiency, long-term sustainability/reliability, impacts on service expansion and reliability, etc. of each solution.
Progress Update: July 2025		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

- Staff completed a financial and efficiency analysis of the new liquid hydrogen fueling station in June 2025. The data will be used to guide changes in fueling processes in an effort to improve efficiencies and reduce boil off losses.
- Stantec is conducting an analysis to increase efficiency of both the liquid and electrolyzer fueling stations.
- Efforts continue with the LH2 station contractor to increase station efficiency.
- Executive, SunFuels and Capital Projects staff continue working with Nel/Cavendish to improve station reliability, address long running reliability issues.
- Nel/Cavendish completed H2 Station Compressor modifications. This effort is expected to result in a service and maintenance agreement on the H2 Station modules and increased station uptime.

Progress Update: December 2024

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

A	Grow the alternative fuels program responsibly	ii. Update the Zero Emission Bus (ZEB) Transition Plan.
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Progress Update: July 2025

- ZEB Transition Plan completed April 2025.

Progress Update: December 2024

- Ongoing.

A	Grow the alternative fuels program responsibly	iii. Address spare ratio compliance with the Federal Transit Administration while expanding the hydrogen-powered bus fleet. The FTA mandated spare ratio is 20%, and SunLine has 2 years to comply.
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Progress Update: July 2025

- SunLine moved 39 vehicles to the contingency fleet. This realignment put our spare ratio at the FTA mandated 20%.
- Disposed of buses that reached their useful life.

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> • Eight leased buses were returned, which reduced the size of the fixed route fleet to a total of 88 buses. • The Contingency Fleet Plan was updated in June 2024, and is now in effect. The contingency fleet is made up of 39 fixed route buses that have reached their useful life by mileage and/or age, but remain reliable. • 8-10 contingency buses are in daily operation as the agency works to improve the reliability of the active zero-emission fleet. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Ongoing: Work is underway to reprogram funding from BEB to FCEB this effort is anticipated to provide additional hydrogen fleet replacements. Work has been done to determine anticipated fleet size and vehicle identification. Vehicles that are not on the fleet list will be dismantled or auctioned to remove from fleet. Fleet should match the identified fixed route requirement in March of 2025. 		
B	Implement service and capital improvements to minimize SunLine's carbon footprint	i. Continue to explore capital improvements and programs to increase access to green hydrogen.
Progress Update: July 2025		
<ul style="list-style-type: none"> • Staff has engaged with multiple future producers of hydrogen. One potential project includes hydrogen production in conjunction with wind turbines. • Staff is working with First Public Hydrogen for possible future green hydrogen supply agreements. • Staff is working with IID and an engineering firm on the preliminary engineering for Indio D2 Utility Upgrade. • The Thousand Palms Public Hydrogen Station has been registered with the state and will produce HRI credits for SunLine upon its opening to the public. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Awarded engineering services contract in October 2024 for Division II utility upgrade. • Finance is collaborating with Capital Project team to establish LH2 station eligibility for Hydrogen Refueling Infrastructure (HRI) credits from the state. • Staff will continue to look for ways to increase the renewable content of the power we use onsite to produce hydrogen. Work will be ongoing for this effort. 		
B	Implement service and capital improvements to minimize SunLine's carbon footprint	ii. Consider pursuing a sustainability study of SunLine's facilities and implementing a Sustainable Facilities Management Program, as resources allow.
Progress Update: July 2025		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> • Application for the CMAQ grant to install additional solar covered parking and EV charging at the Thousand Palms facility has been submitted. • A draft Facility master plan completed as of April 2025 for the Thousand Palms campus. Staff plans to have an engineering firm review and comment on the Plan to ensure thoroughness and appropriateness. • SunLine was not awarded the RAISE grant. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • SunLine's FY 2024 federal RAISE grant application was automatically resubmitted by Federal DOT staff to complete a sustainability study/facilities management plan, given its high rating in the last evaluation process. A final decision is expected by summer 2025. 		
C	Obtain staff buy-in and understanding of SunLine's commitment to sustainability	i. Increase internal communication on SunLine's commitment to shaping healthy communities, improving air quality in the Coachella Valley and regionally, as well as helping the transportation industry transition to zero emission through our leadership in clean air technology and alternative fuels.
Progress Update: July 2025		
<ul style="list-style-type: none"> • Released <i>Transit Talk in March 2025</i>, an agency-wide newsletter sent out bi-monthly designed to improve internal communication and keep staff informed on agency updates. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> • Ongoing: Insight Strategies' support in reframing SunLine's mission and vision statements, in collaboration with staff throughout the organization, is helping with internal understanding and buy-in of our commitment to sustainability and investments in clean air technology. 		
C	Obtain staff buy-in and understanding of SunLine's commitment to sustainability	ii. Increase internal communication on staff efforts to balance investments in leading edge technology with efforts to ensure service reliability.
Progress Update: July 2025		
<ul style="list-style-type: none"> • Townhalls occurred July 8-10, 2025, where the Executive Team presented the new Mission and Vision Statements, along with the FY26 Strategic Priorities, among other topics. A presentation was also made to the graveyard shift in Maintenance, and efforts will continue to ensure that all employees are kept informed as well as possible. • Townhall meetings also occurred in December 2024. 		
Progress Update: December 2024		

FY 2024-2025 SunLine Goals, Strategic Objectives & Priorities

<ul style="list-style-type: none"> Ongoing: Town halls/“roadshows” are being planned in December and future months, related to the strategic planning work being done with Insight Strategies, for the CEO/GM and Chiefs to share information on SunLine priorities and efforts to strengthen service reliability and safety. 		
C	Obtain staff buy-in and understanding of SunLine’s commitment to sustainability	iii. Leverage the Wellness Committee to promote a healthy workforce and efforts to reduce our carbon footprint.
Progress Update: July 2025		
<ul style="list-style-type: none"> The Wellness Committee organized a 12-week weight loss challenge with 35 participants, who personally decided to participate. They experienced health improvements following the initiative, and four winners were announced from the challenge. A staff step challenge was also done in conjunction with the 2024 American Heart Association (AHA) Heart and Stroke Walk event, which SunLine chaired. An event was held earlier this year to celebrate participants in the challenge and the Heart and Stroke Walk. 		
Progress Update: December 2024		
<ul style="list-style-type: none"> Ongoing 		

SunLine Transit Agency

DATE: July 23, 2025 **INFORMATION**

TO: Board of Directors

FROM: Edith Hernandez, Director of Board and Legislative Affairs

RE: Legislative Update for July 2025

Background

The California State Legislature is currently in the first year of the 2025–26 Legislative Session. Lawmakers entered Summer Recess on July 18 and will return on August 18. Fiscal committees will then have until August 29 to advance bills to the floor before the Legislature adjourns on September 12. In parallel, the FY 2025–26 State Budget, signed into law on June 27, provides critical funding for transit through both the General Fund and anticipated Greenhouse Gas Reduction Fund (GGRF) appropriations. These funds support key statewide programs such as the Transit Intercity Rail Capital Program (TIRCP) and the Zero-Emission Transit Capital Program (ZETCP), which are essential to agencies like SunLine.

Additionally, the California Air Resources Board (CARB) implemented amendments to the Low Carbon Fuel Standard (LCFS) effective July 1, enhancing opportunities for transit agencies to generate revenue from the use of low- and zero-emission fuels. The Governor’s proposal to extend and restructure Cap-and-Trade, central to the GGRF, has been only partially addressed, with high-stakes negotiations on remaining allocations expected later this summer.

State

The enacted FY 2025–26 budget fully funds SB 125 TIRCP and TIRCP Cycle 6, with a combined \$1.196 billion from the General Fund and an additional \$1.078 billion in anticipated GGRF commitments. These include multi-year allocations for both TIRCP and ZETCP. While GGRF appropriations will be finalized as part of the Cap-and-Trade Expenditure Plan later this summer, their preservation in the budget represents a key victory for transit. The budget also allocates \$750 million in emergency loans for Bay Area transit agencies and \$132.2 million from the Hino Settlement for CARB’s Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP).

SunLine has taken formal support positions on several active bills, including SB 71 (CEQA exemptions for transit projects), SB 419 (hydrogen sales tax exemption), SB 752 (zero-emission bus tax relief), AB 35 (streamlined CEQA for hydrogen projects), AB 394 (transit employee protections), and AB 476 (copper theft prevention). Staff will continue

monitoring Cap-and-Trade negotiations, as well as other key bills impacting the agency's legislative and regulatory environment.

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

Federal

The House Appropriations Subcommittee has proposed full funding for transit formula grants in FY 2026 at \$14.642 billion, aligning with the Infrastructure Investment and Jobs Act. This maintains consistency in federal support, which helps SunLine plan and budget around anticipated formula allocations for operations and capital needs.

In addition, SunLine has submitted a federal funding request through the Federal Transit Administration's Section 5339 Low or No Emission Grant and Bus and Bus Facilities Grant programs to support the construction of a new maintenance facility. This project would replace the existing 39-year-old facility at SunLine's Thousand Palms location to better support the Agency's growing fleet and long-term operational needs.

Attachment:

- [Item 14a](#) – Shaw Yoder Antwih Schmelzer & Lange State Legislative Update – July 2025



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

July 16, 2025

TO: Board of Directors
SunLine Transit Agency

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

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

General Update

The Legislature is currently hearing bills in policy committees and has until July 18 to do so. July 18 also marks the start of the Legislature's month-long Summer Recess, with members returning to their districts until August 18. Once they reconvene from Summer Recess, fiscal committees will have until August 29 to hear and pass bills to the floor of each house. The Legislature will recess the first year of the two-year 2025-26 Legislative Session on September 12. For information about key legislative and budget deadlines, please see the 2025 Legislative Calendar available [here](#).

State Budget Agreement

On June 24, the Governor and Legislative Leaders announced that they had reached a "three-party agreement" on the FY 2025-26 budget. The Legislature subsequently passed two budget bill "juniors" (bills that amend the main spending bills) and more than a dozen budget trailer bills (bills that contain policy proposals implementing the budget) on June 27, which were then signed into law by the Governor. All told, the Budget Act of 2025 comprises \$321.1 billion in total spending, and contains total reserves of \$15.7 billion.

Of significance to SunLine, the FY 2025-26 budget staves off cuts initially proposed by the Governor in the May Revise and maintains \$1.078 billion in Greenhouse Gas Reduction Fund (GGRF) commitments for the SB 125 Transit Intercity Rail and Capital Program (TIRCP) and the Zero-Emission Transit Capital Program (ZETCP) funds and TIRCP Cycle 6, inclusive of the following line-items:

- FY 2025-26: \$188M for SB 125 - TIRCP
- FY 2025-26: \$180M for TIRCP Cycle 6
- FY 2026-27: \$230M for SB 125 - ZETCP
- FY 2027-28: \$460M for SB 125 - ZETCP

As a technical matter, the preservation of this funding is not reflected in appropriations from the GGRF just yet. Those appropriations will be made later this summer as part of the larger Cap-and-Trade Expenditure Plan.

The budget also appropriates \$1.196 billion in General Fund for SB 125 - TIRCP and TIRCP Cycle 6, inclusive of the following line-items:

- FY 2025-26: \$812M for SB 125-TIRCP (note that this investment, combined with the commitment above, fully funds SB 125 - TIRCP)
- FY 2025-26: \$384M for TIRCP Cycle 6 (note that this investment, combined with the commitment above, fully funds TIRCP Cycle 6)

In addition, the budget includes a \$750 million emergency loan program from the General Fund for select Bay Area transit agencies (AC Transit, BART, Caltrain, and SF Muni) "as they work through fiscal challenges until local revenues stabilize." This loan was included in the budget in lieu of the \$2 billion ask for new transit monies championed by Senator Jesse Arreguín (D-Berkeley) and Assemblymember Mark Gonzalez (D-Los Angeles). The Budget Act conditions this funding on several things, including that agencies have approved repayment plans and that SB 63 (Wiener and Arreguín) is signed by the Governor.

Finally, the budget appropriates \$132.2 million from the Hino Settlement in FY 2025-26 to the California Air Resources Board's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP).

Cap-and-Trade Update

The Legislature largely punted taking action on the Cap-and-Trade program and its corresponding Greenhouse Gas Reduction Fund (GGRF) proceeds. As a refresher, while announcing his May Revise, the Governor also proposed to extend the Cap-and-Trade program an additional 15 years and make major changes to the GGRF:

- \$1 billion a year for the high-speed rail project
- \$1.5 billion for CAL FIRE (which, as an essential government agency, has always previously been funded through the General Fund)
- Reset all other expenditures, including continuous LCTOP and TIRCP funding

The Legislature beat back some of his proposed changes (the \$1.078 billion in restored transit funding, as detailed above), acquiesced on others (by appropriating \$1.25 billion from the GGRF for CAL FIRE for FY 2025-26), but left most issues to deal with later this Summer.

These issues include high-speed rail funding, continuous TIRCP and LCTOP funding, and all additional programs that receive GGRF monies. The stakes for reaching an agreement are high: there are concerns that the next Cap-and-Trade auction, scheduled for August, may again produce tepid proceeds. The last auction, in May, was the worst performing since 2021. These proceeds directly fund the GGRF, and thus, the pot of money the Legislature, the Governor, and advocates are fighting over.

CARB LCFS Amendments Take Effect

On July 1, the California Air Resources Board's amendments to the Low Carbon Fuel Standard (LCFS) went into effect, following approval by the Office of Administrative Law. These amendments were adopted by CARB in November 2025 to strengthen the program, which aims to reduce the carbon intensity of the state's transportation fuel supply. Among other things, the program provides transit and rail agencies in the state the opportunity to generate credits for their use of low and no emission fuels, like electricity or hydrogen, which can be sold to create revenue that supports zero-emission operations.

Bills with Positions

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

Co-Sponsored by the California Transit Association, this bill would extend the current January 1, 2030 sunset date established by SB 922 (Wiener, 2022) for statutorily authorized CEQA exemptions for transit and transportation projects to January 1, 2040. The bill would also 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 419 (Caballero) Hydrogen Fuel Sales Tax Exemption – 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 – 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. ***This bill was held on the Senate Appropriations Suspense File. The author and sponsors are exploring including the tax exemption as part of the final budget agreement.***

AB 35 (Alvarez) CEQA Review for Clean Hydrogen Transportation Projects – 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. ***This is now a 2-year bill.***

AB 394 (Wilson) Transit Safety – SUPPORT

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 expanding existing law (Penal Code Section 243.3) to protect all transit employees against battery. In addition, amendments made in the Senate Judiciary Committee clarify that transit agencies are in fact employers for purposes of acquiring a temporary restraining order. The bill passed out of its final policy committee on July 15 and now heads to the Senate Appropriations Committee. The bill is co-sponsored by the California Transit Association, the Amalgamated Transit Union (ATU), the Teamsters, and SMART-TD.

AB 476 (M. González) Metal Theft – SUPPORT

Co-sponsored by the City of San Jose, this bill seeks to combat the theft of copper wire – an increasing problem affecting infrastructure, construction, and transit projects. The bill would require junk dealers and recyclers to collect more detailed transaction records and provide access to these records to law enforcement. The bill also requires that people selling copper obtain a state license and increases the fine for junk dealers or recyclers who fail to follow the law.

Bills of Interest**SB 79 (Wiener) Transit Oriented Development**

This bill would require that a residential development proposed within one-half or one-quarter mile of a transit-oriented development stop be an allowed use on any site zoned for residential, mixed, commercial, or light industrial development. A transit-oriented development stop is defined as a site with an existing rail or bus rapid transit station, a ferry terminal, or the intersection of two or more high frequency bus stops. SB 79 also requires that the development be eligible for streamlined, ministerial approval.

AB 339 (Ortega) Local Public Employee Organizations: Notice Requirements

This bill would require the governing body of a public agency, board, or commission to provide written notice to an employee organization no less than 120 days prior to issuing a request for proposals, request for quotes, or renewing or extending an existing contract to perform services that are within the scope of work of the job classifications represented by the recognized employee organization.

AB 810 (Irwin) Internet Website Requirements

This bill would expand on existing law to require special districts, joint powers authorities, or other political subdivisions to maintain an internet website with a “.gov” or “.ca.gov” domain. Special districts, joint powers authorities, or other political subdivisions would have until January 1, 2031 to comply with this requirement. While these domains themselves are free, the associated downstream costs for local agencies and districts are very concerning. These include added costs to migrate to the new domain and corresponding email addresses, implementing network login changes, multi-factor authentication, encryption, website redesign, and updating public materials, social media, and more. This would result in significant costs and staff time, for arguably marginal benefits.

This is now a 2-year bill.

AB 1250 (Papan) Paratransit Operators: Recertification of Eligibility

This bill was amended on June 30 to require transit operators, by June 1, 2027, to establish and use a streamlined recertification process for persons with permanent disabilities who were previously determined to be eligible for paratransit service. Previously, the bill would have prohibited transit operators from requiring a person who receives, or is eligible to receive, paratransit services based on a disability or medical condition, and whose condition cannot reasonably be expected to improve, to recertify their eligibility for the services.

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

SunLine Transit Agency

DATE: July 23, 2025 **INFORMATION**

TO: Board of Directors

FROM: Mona Babauta, CEO/General Manager

RE: General Manager's Report for July 2025

Human Resources Update

Years of Service Recognition

I would like to express my gratitude to the following staff members for their dedicated years of service to the organization. Their hard work and commitment have been essential in advancing our work in serving the community.

5 Years:

- Evelyn Lopez (*Paratransit Reservationist*)

10 Years:

- Ernesto Dominguez (*Motor Coach Operator*)
- Manuel Luna (*Motor Coach Operator*)
- Cyle Tisdale (*Paratransit Operator*)

20 Years:

- Valerie Diss (*Motor Coach Operator*)

Thank you for your outstanding contributions and dedication throughout your time at SunLine.

Coachella Valley Unified School District (CVUSD) Job Fair – Thermal, CA (July 9, 2025)

The Hiring Committee participated in CVUSD's Job Expo, an event organized in response to the recent staffing reductions to support impacted employees in finding new career opportunities. During the expo, staff engaged with 36 individuals, collected several resumes, and established connections with CVUSD's Human Resources team. We also shared information about current openings at SunLine and encouraged referrals of qualified candidates.

Mid-Year Town Hall – Thousand Palms, CA (July 8-10, 2025)

We held our Mid-Year Town Halls on July 8–10, 2025, with sessions for Operations, Maintenance (day and night shifts), and Administration staff. The Executive Team shared key agency updates and engaged with employees across all departments.

Topics Covered Included:

- SunLine’s updated Mission Statement and FY26 Strategic Priorities
- How to report near misses and safety concerns
- Ongoing employee safety initiatives
- Workforce investment efforts and career ladder opportunities
- New communication tools and initiatives
- FY26 Budget highlights

Employees had the opportunity to share feedback, questions, and concerns during each session with me. The Executive Team is reviewing all input received and will follow up on issues that were raised.

Strategic Alignment Update

Supervisor/Manager Training Program 2025 - Motivational Leadership – Thousand Palms, CA (June 18, 2025)

Twenty-eight (28) of our supervisory and Executive staff participated in a professional development workshop geared towards motivational leadership. The session was conducted in partnership with College of the Desert through its PACE Professional Education Program and served as a continuation of SunLine’s management learning series.

The workshop encouraged participants to shift the traditional managerial question from “How do I motivate my employees?” to “Am I a motivating leader?” Through real-world examples, participants explored the leadership traits of influential figures from various sectors, including social and technological, ultimately identifying the qualities that make leaders truly motivating.

The program introduced three (3) foundational theories of motivation:

- Herzberg’s Two-Factor Theory (Hygiene Factors vs. Motivation Factors)
- McClelland’s Theory of Needs (Power, Achievement, and Affiliation)
- Theory X and Theory Y, used to assess both team and managerial motivational styles

Each model may influence employee engagement differently and support the achievement of individual, departmental, and organizational goals.

Planning Update

T-Now San Gorgonio Pass Meeting – Beaumont, CA (June 5, 2025)

Planning staff attended the T-Now meeting to collaborate with regional partners on transit service strategies. Presentations focused on regional Short Range Transit Plans (SRTPs) and shared best practices for service planning across the San Gorgonio Pass.

Flywheel Training for Taxi Companies – Thousand Palms, CA (June 2025)

SunLine Regulatory Administration hosted a training session led by Flywheel for local taxi operators. The session introduced Flywheel's partnership with Uber and how the platform enables Uber-dispatched trips to be fulfilled by local taxi companies.

ADA Guru Training – Thousand Palms, CA (June 30 – July 2, 2025)

Staff from Planning, Operations, Safety, Customer Service, and Marketing participated in a three-day ADA training conducted by national expert Jess Segovia. The training reinforced ADA compliance requirements and covered advanced wheelchair securement techniques, strengthening SunLine's commitment to accessible and inclusive service.

Community/Industry Engagement Events

Finance Training and Compliance Update (June 2025)

Finance staff participated in several training and conference opportunities to stay current with evolving accounting standards. Accounting and Financial Reporting Managers, Kristine Aguilar and Isabella Amadeo, attended a one-day compliance update hosted by Vasquez & Co., LLP, the agency's audit firm. Offered at no cost to clients, the session focused on recent changes to GAAP and GASB standards. Participation in these trainings ensures staff remain well-informed and equipped to maintain compliance with updated financial reporting requirements.

Greater Coachella Valley Chamber of Commerce (GCVCC) 2025 Annual Installation and Business Awards Dinner – Indian Wells, CA (June 10, 2025)

Staff attended GCVCC's 2025 Annual Installation and Business Awards Dinner which brought together local leaders and professionals for an evening of connection and celebration. The event provided an opportunity for staff to network and strengthen partnerships with local businesses and community leaders.

GCVCC Board Retreat – Idyllwild, CA (June 20 – 21, 2025)

I had the opportunity to attend my first Board retreat as a new member of the GCVCC Board. It was a valuable experience connecting and collaborating with fellow Board members from diverse backgrounds and areas of expertise. The retreat provided insight

into how we can collectively make a meaningful impact in our roles and effectively support the Chamber's mission.

GCVCC Fired Up! 1st Annual Membership Appreciation Mixer – Palm Desert, CA (June 26, 2025)

Staff attended GCVCC's 1st Annual Membership Appreciation Mixer, "Fired Up" at Acrisure Arena. The event celebrated local business partnerships and provided valuable networking opportunities with community leaders.

Coachella Valley Association of Governments (CVAG) General Assembly – Rancho Mirage, CA (June 30, 2025)

Staff participated in the CVAG General Assembly held at the Westin Rancho Mirage, engaging with regional leaders. The event provided an opportunity to strengthen partnerships and stay informed on upcoming initiatives.

119th Government Finance Officers Association (GFOA) Annual Conference – Washington, D.C. (June 29 – July 2, 2025)

Isabella Amadeo attended the GFOA Annual Conference in Washington, D.C. The conference offered key updates on governmental accounting standards and explored current challenges and opportunities in public sector finance across the United States and Canada. In addition to educational sessions, the event featured vendors showcasing tools and strategies to enhance operational efficiency, some of which may be applicable to SunLine's financial practices.

CALSTART "Transition to Zero" Podcast Interview (July 1, 2025)

The episode of CALSTART's *Transition to Zero* podcast featuring SunLine went live on July 1, 2025. We have maintained a long-standing and mutually beneficial partnership with CALSTART, and I was pleased to join host Jared Schnader to share our journey with clean air technology and our ongoing commitment to being a zero-emission public transit agency. You can listen to the episode here: [Transition to Zero – CALSTART Podcast](#).

11th Annual Pack the Bus – Palm Desert, CA (July 17, 2025)

Our annual Pack the Bus school supply drive took place on Thursday, July 17, 2025. A SunLine bus was located in front of the Walmart in Palm Desert (34-500 Monterey Avenue, Palm Desert CA) from 7:00 am to 7:00 pm. We received many donations that will go to the Boys and Girls Club of Cathedral City. They will be distributing these backpacks and school supplies within the coming weeks to students throughout the Coachella Valley. We want to thank all of our Board members, our sponsor (KESQ and Alpha Media) and the community for supporting this event. Pack the Bus is part of SunLine's continued effort to build and strengthen the relationship with the community it serves.

***SunLine Youth Sustainability Advisory Committee Application Submission
Deadline is August 1, 2025***

We are still taking applications for the 2025-2026 SunLine Youth Sustainability Advisory Committee through August 1, 2025. This is an initiative designed to engage local youth in sustainability, clean energy, and public transportation policy. We are seeking motivated students ages 13 to 18 (including those who are homeschooled) to take part in this unique opportunity to learn about the inner workings of public transit and local government operations.

We kindly ask for your support in sharing this opportunity within your networks, particularly with educators, community leaders, and families who may know students with a passion for public service and environmental stewardship. Your continued support helps inspire and shape the next generation of leaders in transit and our communities. Students can submit their application on our website: [Youth Sustainability Committee | SunLine Transit Agency](#).