



Attachment Under Separate Cover

**Agenda – Joint Regular Meeting of the SunLine Transit Agency & SunLine Services
Group Board of Directors - Wednesday, March 26, 2025 at 12:00 p.m.**

Item 14 – Draft Vision and Mission Statement and Strategic Plan

Attachment 14b – Draft Strategic Plan

SunLine Transit Strategic Plan

January 2025 – June 2028



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Letter from the CEO



Mona Babauta

Mona Babauta, CEO

Introduction to the SunLine Transit Strategic Plan

A strategic plan serves as a roadmap that outlines an agency's goals and strategies. Its purpose is to provide a clear direction and guide decision-making processes within the agency. By looking ahead and setting goals for the next three years, the strategic plan helps align the efforts of different departments and stakeholders toward a common vision. It provides a comprehensive and holistic view of the agency's future.

The benefits of a strategic plan are many. First, it enhances organizational focus by defining priorities and setting clear goals. Second, it improves resource allocation by identifying the key areas where investments and efforts should be concentrated. Lastly, a strategic plan promotes accountability and performance measurement. Overall, a well-crafted strategic plan provides a roadmap for success, fosters organizational growth, and enhances adaptability.

Insight Strategies' Organizational Health and High-Performance Framework©

To aid in the facilitation of the strategic planning process, SunLine Transit Agency engaged the consulting firm Insight Strategies, Inc. With 30+ years' experience consulting with executives and organizations on organizational excellence, Insight has crafted an Organizational Health & High-Performance Framework© that has proven success. SunLine Transit's strategic plan was grounded in this excellence model.

Organizations perform at their best when employees see themselves and the roles they play in the mission and aspirational vision of the organization ("the why"); when strategies and goals are clear and aligned to the mission and vision ("the what"); when key processes anchor the mission, vision, and strategies into the day to day operations – driving employee effectiveness and accountabilities ("the how"); and when the right people are in the right positions to implement the strategies and goals and exemplify the desired culture ("the who"). Ensuring all components are maximized and aligned results in an organization's ultimate success. (See graphic)



As Peter Drucker famously said, "Culture eats strategy for breakfast."

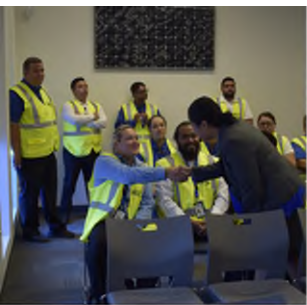
Strategic Plan Overview

SunLine Transit's Mission

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

SunLine Transit's Vision (Proposed)

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



Strategic Priorities

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

Priority Owner: *Chief Transit Officer*

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

Priority Owner: *Director of Board and Legislative Affairs*

3. Environmental Impact: Our commitment to environmental impact is to reduce our carbon footprint by working closely with SunLine Transit Operations to support sustainable initiatives and by implementing green energy solutions

Priority Owner: *Chief of Maintenance*

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

Priority Owner: *Chief Safety Officer*

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

Priority Owner: *Chief of Human Relations*

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

Priority Owner: *Chief Finance Officer*

Strategic Priority #1: Service Reliability

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

Strategic Agency Goal #1: Meet or exceed service expansion deadlines to meet growing community needs and within 1.5 years of resources becoming available 100% of the time.

Goal Owner: Chief Planning Officer

Key Actions

Strategic Agency Goal #2: Increase and sustain fixed route fleet availability to 20% above schedule peak requirement by May 3, 2025.

Goal Owner: Chief Maintenance Officer

Key Actions

Strategic Agency Goal #3: Increase and sustain paratransit fleet availability from X% to 90% by May 1, 2025.

Goal Owner: Chief Maintenance Officer

Key Actions

Strategic Agency Goal #4a: Establish agency operational standards for fleet and facilities maintenance and replacement by December 30, 2025.

Strategic Agency Goal #4b: Achieve 100% adherence to agency operational standards by SunLine Staff by December 31, 2025.

Goal Owner: Chief Maintenance Officer

Key Actions

Strategic Agency Goal #5: Establish a contingency plan to achieve 100% fleet fueling availability at all times by June 30, 2025.

Goal Owner: Chief Maintenance Officer	Key Actions
Strategic Agency Goal #6: Implement strategies towards achieving fixed route missed trips to zero by June 30, 2026.	
Goal Owner: Chief Transportation Officer	Key Actions
Strategic Agency Goal #7a: Establish a comprehensive plan/training program for maintenance staff to develop skillsets to maintain 100% of the fleet. Strategic Agency Goal #7b: Achieve a basic universal level of skills competency across 100% of the fleet maintenance staff by January 30, 2027.	
Goal Owner: Chief Maintenance Officer	Key Actions
Strategic Agency Goal #8: Decrease voluntary turnover of coach operators from X to less than 5% for the next three years (June 30, 2026.)	
Goal Owner: Chief Transportation Officer	Key Actions

Strategic Priority #2: Customer Experience

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

Strategic Agency Goal #1a: Establish a measurable baseline of brand and service awareness by conducting a community outreach survey by December 31, 2026. Strategic Agency Goal #1b: Improve positive perception of brand and service awareness from X to Y over the next three years, by December 31, 2028.	
Goal Owner: Director of Board and Legislative Affairs	Key Actions

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

Goal Owner: Chief Planning Officer

Key Actions

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

Goal Owner: Chief Planning Officer

Key Actions

Strategic Agency Goal #4a: Understand customers, potential customers, and community values and needs from the time a person thinks about transit to their final destination by embarking on a journey mapping strategy to be completed by March 31, 2026.

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

Goal Owner: Director of Board and Legislative Affairs

Key Actions

Strategic Priority #3: Environmental Impact

Our commitment to environmental impact is to reduce our carbon footprint by working closely with SunLine Transit Operations to support sustainable initiatives and by implementing green energy solutions

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

Strategic Agency Goal #1b: Increase the public's positive awareness of the benefit of (ZET) from X to Y% by August 30, 2026.

Goal Owner: Deputy Chief of General Services	Key Actions
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Strategic Priority #4: Safety & Security

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

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

Goal Owner: Chief Safety Officer	Key Actions
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Strategic Agency Goal #2a: Establish a baseline of customer, potential customer, and community perception of SunLine's system safety by June 30, 2026.
Strategic Agency Goal #2b: Improve the perception of system safety/security from X to Y (TBD) on the system safety survey by December 30, 2028.

Goal Owner: Chief Safety Officer	Key Actions
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Strategic Agency Goal #3: Implement strategies towards achieving zero preventable vehicle collisions by November 9, 2027. (Milestones: reduce by 10% each year)

Goal Owner: Chief Safety Officer	Key Actions
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Strategic Agency Goal #4: Implement strategies towards achieving zero preventable passenger injuries by November 9, 2027.

Goal Owner: Chief Safety Officer	Key Actions
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Strategic Priority #5: People & Workforce

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

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

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

Goal Owner: Chief of Strategic Alignment (formerly the Deputy Chief of Human Relations)	Key Actions
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Strategic Agency Goal #3: Improve on perception and transparency between management and staff as measured by an increase from 4.65/7 to 5.5/7 (an improvement of 6.5%) on the VOE Survey (2024 question #26) by December 30, 2026.

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

Goal Owner: Chief of Human Relations

Key Actions

Strategic Agency Goal #5: Improve employee productivity by:
 A.) decreasing unscheduled absenteeism from X to Y by December 30, 2025.
 B.) reducing workers compensation claims from 118 to <100 by December 30, 2025.

Goal Owner: Chief of Human Relations

Key Actions

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

Goal Owner: Chief of Human Relations

Key Actions

Strategic Priority #6: Resources acquisition, allocation, and management

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

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

Goal Owner: Chief Financial Officer

Key Actions

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

Goal Owner: Chief Financial Officer

Key Actions

Strategic Agency Goal #3a: Establish a comprehensive list of Agency wide assets in the enterprise asset management system to be completed by July 31, 2025.

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

Goal Owner: Chief Planning Officer

Key Actions

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

Goal Owner: Chief Financial Officer

Key Actions



Background

Plan Development

Arriving at the three-year strategic priorities was a multi-step process. The agency gathered data and selected priorities from many sources including organizational and employee assessments, regulatory mandates, Board presentations, annual employee engagement surveys, customer surveys, and more. Guided by the agency's mission, vision, and values, SunLine Transit prioritized themes that reflected both employee feedback and the SWOT² analysis. SunLine Transit evaluated those finalists against the guideposts for decision-making. From there, SunLine Transit's leadership team reached a consensus on the five most critical agency-wide priorities that provide a solid foundation for the agency's continued advancement.

Organizational and Employee Assessment

An organizational and employee assessment was conducted by Insight Strategies, Inc. (Insight) on behalf of SunLine Transit. Nearly 100 SunLine Transit employees participated in the oral strategic planning assessment and 42 employees participated in the written strategic planning survey assessment. The purpose of the assessment was to elicit input to shape and inform SunLine Transit's strategic plan and assess the current state of SunLine Transit's leadership team effectiveness and opportunities for alignment.

The Impact of Culture + SunLine Transit's Desired Culture

Describing a company's culture is like describing an individual's personality. It's a combination of the ethics, values, perceptions, atmosphere, practices, attitudes, and beliefs shared by a company's employees. In simple terms, a company's culture is "the way we do things around here."

The key to transforming a strategic plan from theory to successful implementation is culture. Concurrent with this process and informed by the organizational and employee assessments, SunLine Transit identified its current culture and defined its desired culture. Building upon what SunLine Transit already does well, the strategic plan seeks to make SunLine Transit an ideal work environment, focusing on:

- Communication
- Accountability
- Increasing innovation and creativity
- Collaboration
- Learning and Development

Guidepost for Decision-Making

A guidepost for decision-making is a compass and helps teams and individuals prioritize decisions and actions. When used properly the guidepost:

- Facilitates alignment of team output
- Provides a framework for discussion, disagreement, and complex decision making
- Reduces confusion
- Saves time

SunLine Transit's Guidepost for Decision Making is as follows...

- What's best for SunLine vs. a department or person
- 3-5 year horizon
- Regulatory Mandates & Compliance
- Protects and supports SunLine's brand reputation
- Supports mission and vision
- Short-term and long-term health & stability of the agency

SWOT² Analysis

A SWOT² analysis is a strategic planning tool that helps organizations evaluate their strengths, weaknesses, opportunities, and threats. It provides a comprehensive overview of the internal and external factors that can impact the success of a business or project. SWOT analysis provides a structured framework for organizations to evaluate their current position, make informed decisions, and develop effective strategies to achieve their goals.

Leadership and Board Workshops

A total of ten workshops were facilitated by Insight. The outcomes of these workshops include a guidepost for strategic decision-making, a revised mission statement, a vision statement, strategic priorities, agency goals, cross-functional interdependency agreements, and more. This document summarizes the outcomes of the ten workshops.



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