



LOSSAN Rail Corridor Agency

Board Meeting

Agenda

Monday, June 16, 2025 at 10:30 a.m.

REVISED

Meeting Location:

OCTA Headquarters (550 S. Main, Orange)

Board Members

Fred Jung, OCTA, Chair

Fred Strong, SLOCOG, Vice Chair

Fernando Dutra, Metro

Jewel Edson, NCTD

Katrina Foley, OCTA

Joy Lyndes, SANDAG

Jennifer Mendoza, SDMTS

Paula Perotte, SBCAG

Dana Reed, RCTC

Jess Talamantes, Metro

Jim White, VCTC

Jeanne Cantu, Amtrak, Ex-Officio

LaDonna DiCamillo, CHSRA, Ex-Officio

John Gabbard, SCAG, Ex-Officio

Kyle Gradinger, Caltrans, Ex-Officio

Teleconference Locations:

Whittier City Hall, Admin Committee Room

13230 Penn St.

Whittier, CA

Solana Beach City Hall

635 South Highway 101

Solana Beach, CA

Encinitas City Hall

505 S. Vulcan Ave.

Encinitas, CA

City of Coronado, City Hall

1825 Strand Way

Coronado, CA



BOARD MEETING AGENDA

Goleta City Hall, Room 1
130 Cremona Dr.
Goleta, CA

Indian Wells City Hall
44950 Eldorado Dr.
Indian Wells, CA

Ventura County Transportation Commission
751 E. Daily Dr., Suite 420
Camarillo, CA

Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, CA 90012

Accessibility

Any person with a disability who requires a modification or accommodation to participate in this meeting should contact the Los Angeles - San Diego - San Luis Obispo (LOSSAN) Rail Corridor Agency Clerk of the Board, telephone (714) 560-5676, no less than two business days prior to this meeting to enable LOSSAN to make reasonable arrangements to assure accessibility to this meeting.

Agenda Descriptions

Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Board of Directors may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

Public Availability of Agenda Materials

All documents relative to the items referenced in this agenda are available for public inspection at www.lossan.net or through the LOSSAN Clerk of the Board's office at: Orange County Transportation Authority Headquarters (OCTA), 600 South Main Street, Orange, California.

Meeting Access and Public Comments on Agenda Items

Members of the public can either attend in-person or access live streaming of the Board and Committee meetings by clicking this link: <https://lossan.legistar.com/Calendar.aspx>



BOARD MEETING AGENDA

In-Person Comment

Members of the public may attend in-person and address the Board of Directors regarding any item within the subject matter jurisdiction of the LOSSAN Rail Corridor Agency. Please complete a speaker's card and submit it to the Clerk of the Board and notify the Clerk regarding the agenda item number on which you wish to speak. Speakers will be recognized by the Chair at the time of the agenda item is to be considered by the Board. Comments will be limited to three minutes. The Brown Act prohibits the Board from either discussing or taking action on any non-agendized items.

Written Comment

Written public comments may also be submitted by emailing them to lossanclerk@octa.net, and must be sent by 5:00 p.m. the day prior to the meeting. If you wish to comment on a specific agenda item, please identify the Item number in your email. All public comments that are timely received will be part of the public record and distributed to the Board. Public comments will be made available to the public upon request.

Call to Order

Roll Call

Pledge of Allegiance

Special Calendar

There are no Special Calendar Matters.

Consent Calendar (Items 1 through 6)

All items on the Consent Calendar are to be approved in one motion unless a Board Member or a member of the public requests separate action or discussion on a specific item.

1. Approval of Minutes

Recommendations(s)

Approve the minutes of the May 19, 2025 LOSSAN Rail Corridor Agency Board of Director's meeting.

Attachments:

[Minutes](#)

2. Fiscal Year 2024-25 Third Quarter Amtrak Pacific Surfliner On-Time Performance Analysis

Overview

On-time performance reflects the quality and dependability of the Pacific Surfliner service,



BOARD MEETING AGENDA

and has a considerable effect on repeat ridership, based on customer travel experience. This report summarizes the on-time performance of the Amtrak Pacific Surfliner service during the third quarter of fiscal year 2024-25, covering the months of January, February, and March 2025.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

3. Fiscal Year 2024-25 Third Quarter Budget Status Report

Overview

The Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency's Fiscal Year 2024-25 budget was approved by the Board of Directors on March 18, 2024. The California State Transportation Agency approved the Fiscal Year 2024-25 budget and funding on September 26, 2024. This report summarizes financial activities and performance through the Third quarter of Fiscal Year 2024-25, covering the months of January through March 2025.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

4. Fiscal Year 2024-25 Third Quarter Grant Reimbursement Status Report

Overview

The Quarterly Grant Reimbursement Status Report summarizes grant activities for the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency's Board of Directors. This report focuses on activity for the period of January through March 2025.

Recommendation(s)

Receive and file as an information item.

Attachments:



BOARD MEETING AGENDA

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Attachment D](#)

[Attachment E](#)

5. **Fiscal Year 2024-25 Third Quarter Los Angeles - San Diego - San Luis Obispo Rail Corridor Trends**

Overview

A report on ridership, revenue, and on-time performance for passenger rail services on the Los Angeles - San Diego - San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, covering the third quarter of state fiscal year 2024-25.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

6. **Fiscal Year 2024-25 Third Quarter Amtrak Pacific Surfliner System Safety and Incident Report**

Overview

The Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency operating agreement with Amtrak includes police services to provide a safe, secure, and reliable service to Pacific Surfliner crews and passengers. These police services have a considerable effect on repeat ridership, based on the customer travel experience. This report presents a summary on system safety and incidents for Amtrak Pacific Surfliner service during the third quarter of fiscal year 2024-25, covering the months of January, February, and March 2025.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)



BOARD MEETING AGENDA

Regular Calendar

7. Temporary Additional Santa Barbara Service

Overview

The Ventura County Transportation Commission and the Santa Barbara County Association of Governments have requested the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency to support a temporary service agreement that would allow the Southern California Regional Rail Authority/Metrolink to provide additional rail service between Ventura and Santa Barbara Counties. The additional service would utilize a rail timeslot previously secured by the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency through an agreement with Union Pacific Railroad Company and intended to be utilized for a future expansion of Amtrak Pacific Surfliner service.

Recommendation(s)

- A. Authorize the Managing Director to negotiate the terms of an agreement or agreements to subcontract the implementation of additional temporary service in partnership with Metrolink and funded by Ventura County Transportation Commission and the Santa Barbara County Association of Governments, allowing for the temporary use of Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency's timeslot while assuring anticipated future expansion of Pacific Surfliner to north of Los Angeles to Santa Barbara, Goleta and San Luis Obispo.
- B. Direct the Managing Director to bring back the agreement(s) necessary for Board approval.

Attachments:

[Staff Report](#)

8. Reinstatement of Checked Baggage Service

Overview

In November 2023, the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors approved the Proposed Net Cost-Reduction Plan submitted by staff, which outlined a series of strategies aimed at reducing net operating costs while maintaining essential passenger services. A key component of the plan was the development of a revised station staffing model in collaboration with Amtrak, along with an evaluation of cost-effective opportunities to reopen select stations and restore checked baggage service.

With the revised station staffing model now implemented, and the successful reopening of Anaheim and Oceanside stations on March 10, 2025, staff recommends reinstating checked baggage service on the Pacific Surfliner. A financial model has also been



BOARD MEETING AGENDA

developed to support cost recovery through a per-bag fee structure.

In addition, staff recommends updating the Pacific Surfliner baggage policy to align more closely with Amtrak's national baggage policy while ensuring consistency and operational efficiency.

Recommendation(s)

- A. Coordinate with Amtrak to reinstate checked baggage service on the Pacific Surfliner.
- B. Implement a baggage fee of \$10 per checked bag to offset associated service costs.
- C. Approve updates to the Pacific Surfliner baggage policy.

Attachments:

[Staff Report](#)

[Presentation](#)

Discussion Items

9. Pacific Surfliner Service Restoration Update

Overview

Staff will provide an update on the status of Pacific Surfliner service restoration.

10. Pacific Surfliner Marketing Update

Overview

Staff will provide an update on marketing efforts.

Attachments:

[Presentation](#)

11. Public Comments

12. Managing Director's Report

13. Board Members' Report



BOARD MEETING AGENDA

14. Closed Session

Overview

A Closed Session will be held pursuant to Government Code Section 54957 - Public Employee Evaluation - LOSSAN Managing Director.

15. Adjournment

The next regularly scheduled meeting of this Board will be held:

10:30 a.m. on Monday, July 21, 2025

OCTA Headquarters
550 South Main Street
Orange, California



MINUTES

LOSSAN Agency Board of Directors Meeting

Call to Order

The May 19, 2025, regular meeting of the Board of Directors Board of the LOSSAN Rail Corridor Agency was called to order by Chair Jung at 12:31 p.m. at LA Metro, 1 Gateway Plaza, Los Angeles, CA.

Roll Call

The Clerk of the Board conducted an attendance roll call and announced a quorum present as follows:

Directors Present: Fred Strong, SLOCOG, Vice Chair
Fernando Dutra, Metro
Jim White, VCTC
Jess Talamantes, Metro
Jeanne Cantu, Amtrak, Ex-Officio
John Gabbard, SCAG, Ex-Officio

Via Teleconference: Fred Jung, OCTA, Chair
Jewel Edson, NCTD
Katrina Foley, OCTA
Roy Lee, SBCAG, Alternate
Joy Lyndes, SANDAG
Jennifer Mendoza, SDMTS
Dana Reed, RCTC
Kyle Gradinger, Caltrans, Ex-Officio

Directors Absent: Paula Perotte, SBCAG
LaDonna DiCamillo, CHSRA, Ex-Officio

Staff Present: Jason Jewell, Managing Director
Allison Cheshire, Clerk of the Board Specialist, Senior
Gina Ramirez, Assistant Clerk of the Board
James Donich, General Counsel
LOSSAN Staff

Consent Calendar (Items 1 through 5)

1. Approval of Minutes

A motion was made by Director Foley, seconded by Director Dutra, and following a roll call vote, declared passed 11-0, to approve the minutes of the March 17, 2025 LOSSAN Rail Corridor Agency Board of Director's meeting.



MINUTES

LOSSAN Agency Board of Directors Meeting

2. Approval of the LOSSAN Rail Corridor Agency Title VI Program Document

A motion was made by Director Foley, seconded by Director Dutra, and following a roll call vote, declared passed 11-0, to adopt the proposed the Los Angeles – San Diego - San Luis Obispo Rail Corridor Agency Title VI Program document for a three-year period.

3. Proposed Changes to the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Travel, Conference, and Business Expense Policy

A motion was made by Director Foley, seconded by Director Dutra, and following a roll call vote, declared passed 11-0, to adopt the proposed updates to the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Travel, Conference, and Business Expense Policy and authorize staff to implement the recommended changes.

4. Amendment to Agreement for Social Media Marketing and Passenger Communication Services

A motion was made by Director Foley, seconded by Director Dutra, and following a roll call vote, declared passed 11-0, to authorize the Managing Director to negotiate and execute Amendment No. 4 to Agreement L-2-0011 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and The Abbi Agency, to exercise the second option term of the agreement, effective August 1, 2025, through July 31, 2026, in the amount of \$230,400, to provide continued social media marketing and passenger communication services for the Pacific Surfliner marketing program. This will increase the maximum obligation of the agreement to a total contract value of \$661,400.

5. Amendment to Agreement for Field Marketing Services

A motion was made by Director Foley, seconded by Director Dutra, and following a roll call vote, declared passed 11-0, to authorize the Managing Director to negotiate and execute Amendment No. 2 to Agreement L-4-0016 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and The Abbi Agency, to exercise the first option term of the agreement, effective July 1, 2025, through June 30, 2027, in the amount of \$600,000, to provide continued field marketing services for the Pacific Surfliner marketing program. This will increase the maximum obligation of the agreement to a total contract value of \$1,150,000.



Discussion Items

6. Federal Corridor Identification and Development Program Update

Shannon Simonds, Chief, Office of Rail Planning and Implementation, Caltrans, provided a presentation

No action was taken on this item.

7. Coachella Valley Rail Project Update

Aaron Hake, Executive Director, Riverside County Transportation Commission, provided a presentation.

No action was taken on this item.

8. Pacific Surfliner Service Update

Jason Jewell, Managing Director, provided a report.

No action was taken on this item.

9. Public Comments

No public comments were received.

10. Managing Director's Report

Jason Jewell, Managing Director, provided a ridership update.

11. Board Members' Report

Director Lyndes provided an update on the following:

- Phase 5 of the Del Mar Bluffs stabilization efforts
- Batiquitos Lagoon double tracking project
- SANDAG complementary study to Caltrans corridor ID project from downtown San Diego to the boarder

Director White reported that he recently chaired the the Coast Rail Coordinating Council meeting in San Jose and commented on the collaboration efforts by LOSSAN and other agencies in California.

Vice Chair Strong reported that the California Mid-State Fair is scheduled for July 16-27 2025 in Paso Robles and encouraged visitors to take the train to travel to the area.



MINUTES

LOSSAN Agency Board of Directors Meeting

12. Closed Session

A Closed Session was held pursuant to Government Code Section 54956.9(d) - Conference with General Counsel - Potential Litigation - One Item.

There was no report out on this item.

13. Adjournment

The meeting was adjourned at 1:33 p.m. The next regularly scheduled meeting of this Board will be held:

10:30 a.m. on Monday, June 16, 2025

OCTA Headquarters
550 South Main Street
Orange, California


ATTEST

Allison Cheshire
Clerk of the Board



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director 

Subject: Fiscal Year 2024-25 Third Quarter Amtrak Pacific Surfliner On-Time Performance Analysis

Overview

On-time performance reflects the quality and dependability of the Pacific Surfliner service, and has a considerable effect on repeat ridership, based on customer travel experience. This report summarizes the on-time performance of the Amtrak Pacific Surfliner service during the third quarter of fiscal year 2024-25, covering the months of January, February, and March 2025.

Recommendation

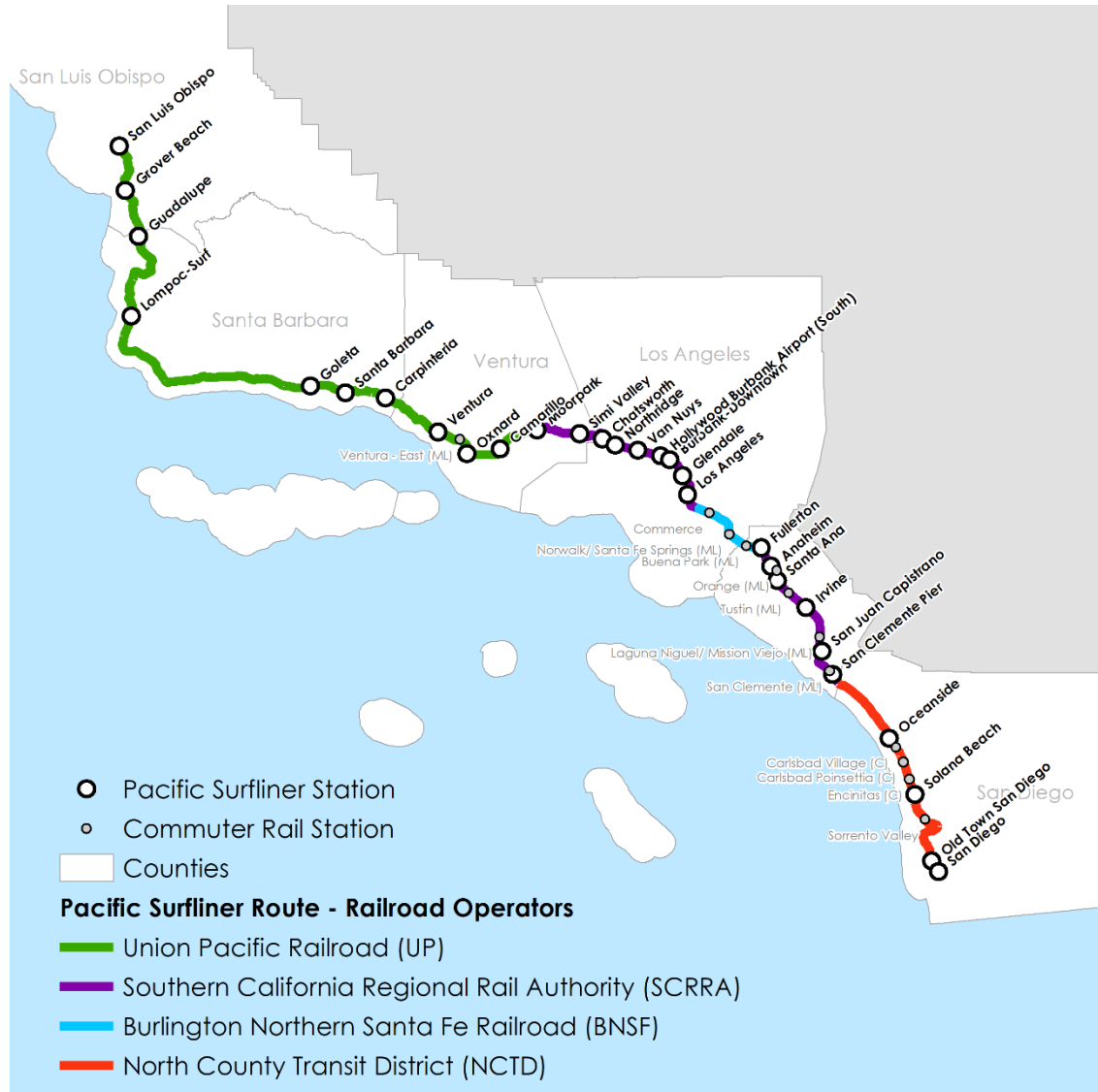
Receive and file as an information item.

Background

The Amtrak Pacific Surfliner route operates in a complex environment, along the 351-mile Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor (Corridor), which traverses through a six-county coastal region in Southern California. As illustrated in Figure 1 on the next page, the rail right-of-way along the corridor is hosted by four different host railroads, including the Union Pacific Railroad (UPRR), the BNSF Railway Company (BNSF), the Southern California Regional Rail Authority (SCRRA), and North County Transit District (NCTD).

In addition to the Amtrak Pacific Surfliner intercity passenger rail service, Amtrak long-distance trains, Metrolink commuter trains, and COASTER commuter trains also operate along the north-south corridor.

Figure 1: Pacific Surfliner Route



Before the COVID-19 pandemic necessitated service reductions in late March 2020, the LOSSAN Corridor held over 150 daily one-way trains, spanning 41 stations. Within this activity, the Pacific Surfliner service alone accounted for 27 trains and served 27 stations. Today, the Pacific Surfliner has expanded its reach to 29 stations, maintaining a schedule of 22 daily one-way trains, equating to eleven round trips. The eleventh-round trip between Los Angeles and San Diego was added in the end of March 2025. Reflecting on the fiscal year 2018-19, the last complete fiscal year before the pandemic's impact, the Pacific Surfliner boasted nearly 2.8 million passenger trips, with an additional 5.4 million trips taken on the combined commuter rail services of Metrolink and COASTER.

Discussion

This report provides an update on the average systemwide on-time performance (OTP) of the Amtrak Pacific Surfliner for the third quarter (Q3) of FY 2024-25. The following metrics give an overview of the Pacific Surfliner train OTP scores for the reporting quarter, as well as information about delay causes:

- Endpoint OTP
- Total Trains Operated
- Total Trains Cancelled or Suspended
- Customer OTP
- Ridership
- Endpoint OTP by Train
- Total Train Miles
- Systemwide Delays by Responsible Party, Per 10,000 Train Miles
- Systemwide Delays by Delay Type, Per 10,000 Train Miles
- Host-Responsible Delays, Per 10,000 Train Miles
- Total Delays Around Stations (or Other Specific Locations)

Endpoint OTP

Endpoint OTP represents the percentage of trains arriving to their final station within 15 minutes of their schedule arrival time. This metric is part of the Uniform Performance Standards (UPS) that the LOSSAN Agency is required to report to the California State Transportation Agency (CalSTA), which sets a 90 percent endpoint OTP standard.

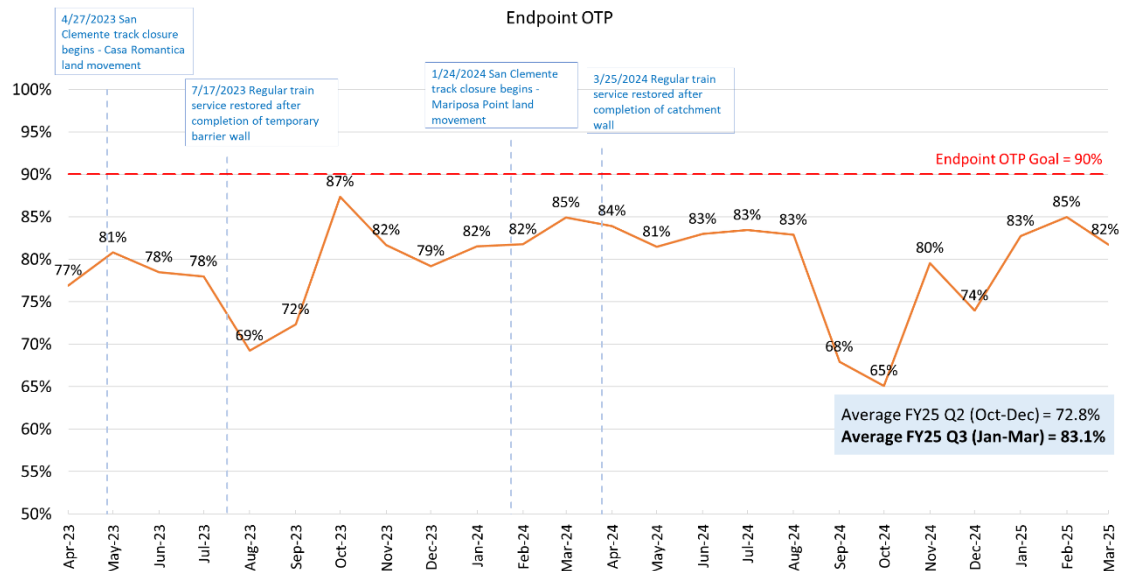
Figure 2: Endpoint OTP by Total Trains Operated

Values	FY 2025 Q2	FY 2025 Q3	% Change
Late	497	286	-42.5%
On-Time	1,329	1,408	5.9%
Operated	1,826	1,694	-7.2%
Endpoint OTP	72.8%	83.1%	14.2%

As shown in Figure 2, for Q3 FY 2024-25, 1,408 of 1,694 operated Pacific Surfliner trains arrived at their endpoint station on-time, while 286 trains arrived late. This results in a systemwide endpoint OTP of 83.1 percent for Q3 FY 2024-25, representing a 14.2 percent increase from 72.8 percent endpoint OTP for the previous quarter.

Figure 4 shows historical monthly systemwide endpoint OTP from April 2023 to the present. Notes within the chart highlight the events that have had significant impacts on OTP.

Figure 4: Endpoint OTP



The increase in OTP from the prior quarter is primarily due to the resolution of several challenges that negatively impacted service reliability last quarter. In September and October 2024, dispatching-related delays occurred on the BNSF Railway (BNSF) between Los Angeles and Fullerton following BNSF's relocation of its Southern California dispatching functions from San Bernardino to Fort Worth, Texas. The transition led to disruptions as newly assigned dispatchers were unfamiliar with the territory. Since then, BNSF has assigned a senior manager to oversee dispatching operations in the region, which has contributed to improved on-time performance.

In addition, mechanical issues that significantly affected operations last quarter, specifically engine-related failures involving hydraulic, coolant, and DEF hoses, have been gradually mitigated. LOSSAN has been working with Amtrak and Caltrans to secure repair kits and implement updated replacement cycles for the affected parts. While some issues persist, these efforts have helped stabilize fleet availability and improve overall service reliability in Q3 FY 2024-25.

On any given date, an incident can lead Amtrak to either cancel or suspend one or more scheduled trains. Cancelled trains are treated as late trains, and are reflected in endpoint and customer OTP calculations, but suspended trains are not included. A cancellation means that Amtrak decided not to operate the train less than four hours before its scheduled departure. A suspension means that Amtrak decided not to operate the train at least four hours before its scheduled initial terminal departure.

The table in Figure 3 shows that for Q3 FY 2024-25, 13 trains were cancelled, and 67 trains were suspended, representing a 95.1 percent increase from the previous quarter. Of the 67 suspended trains, 39 were the result of planned trackwork and infrastructure projects. These suspensions were necessary to accommodate full and partial corridor closures across multiple territories, including areas managed by BNSF, Union Pacific, and NCTD. The remaining 26 suspended trains were due to unplanned service disruptions, including an incident involving downed power lines that required a temporary shutdown for safety and repairs.

Figure 3: Total Trains Cancelled or Suspended

Status	FY 2025 Q2	FY 2025 Q3	% Change
Cancelled	37	13	-64.9%
Suspended	4	67	1575.0%
Total	41	80	95.1%

Endpoint OTP by Train

One major delay incident can result in cascading delays that impact multiple trains throughout the day. One factor is that a single train consist is typically used by multiple routes/trains throughout the day. For example, upon its arrival to Santa Fe Depot in San Diego, the same equipment used to operate southbound Train 564 is then used to operate northbound Train 777. Therefore, delays experienced by southbound Train 564 have the potential to result in delays for northbound Train 777, as well as any additional trains operated with the same train consist.

Figure 7 shows individual endpoint OTP for each train that operated during Q3 FY 2024-25. During this period, five trains reached the endpoint OTP goal of 90 percent or above. The train with the lowest endpoint OTP average for the quarter was Train 784, which experienced increased delays due to commuter train interference, passenger train interference, and passenger-related delays.

Figure 7: Endpoint OTP by Train

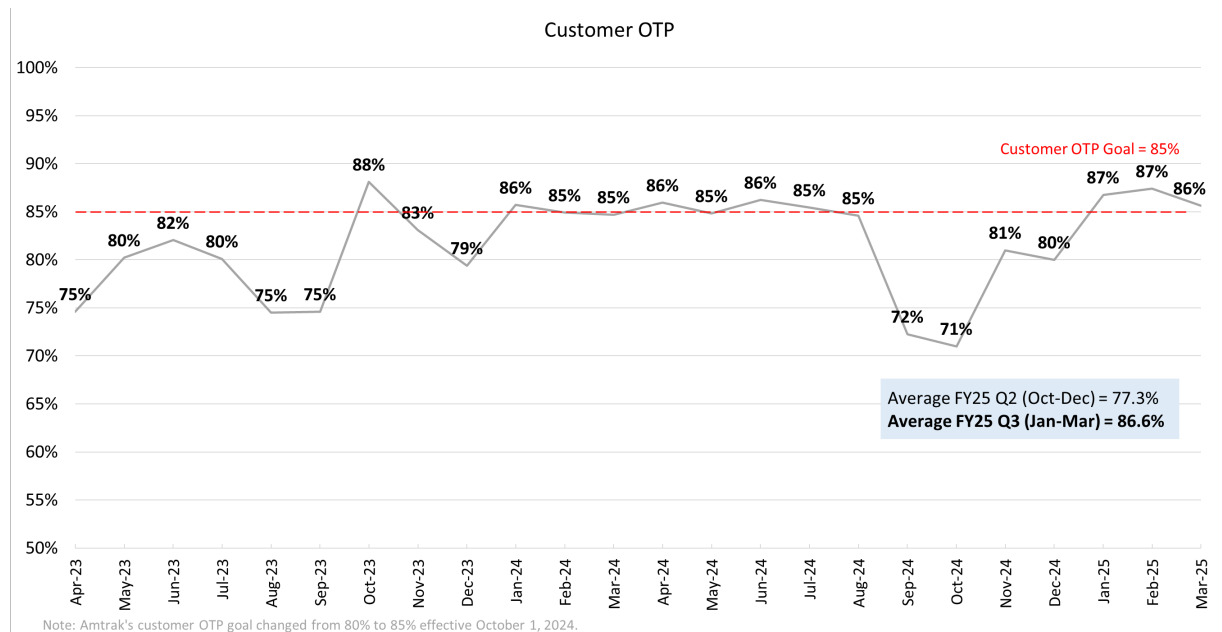
Train	Orig-Dest	3-Month Average	# Trains On Time	# Trains Operated
566	LAX-SAN	100.0%	1	1
579	SAN-LAX	100.0%	1	1
595	SAN-LAX	92.7%	76	82
564	LAX-SAN	91.7%	77	84
591	SAN-LAX	90.7%	78	86
761	SAN-SLO	87.2%	75	86
562	LAX-SAN	86.0%	74	86
770	GTA-SAN	86.0%	74	86
794	SLO-SAN	86.0%	74	86
785	SAN-GTA	84.9%	73	86
790	GTA-SAN	84.9%	73	86
573	SAN-LAX	84.1%	69	82
586	LAX-SAN	83.8%	67	80
572	LAX-SAN	82.9%	68	82
580	LAX-SAN	82.6%	71	86
765	SAN-GTA	82.6%	71	86
581	SAN-LAX	81.4%	70	86
774	SLO-SAN	81.4%	70	86
587	SAN-LAX	81.3%	65	80
769	SAN-GTA	79.8%	67	84
777	SAN-SLO	70.9%	61	86
784	GTA-SAN	61.6%	53	86
System		83.1%	1408	1694

Customer OTP

Customer OTP measures the on-time arrival of every passenger, including those who detrain at intermediate stops along a route and those who ride the entire route.

The 85 percent goal shown in red in Figure 5 is set by Amtrak. For Q3 FY 2024-25, customer OTP averaged 86.6 percent, representing a 12 percent increase from 77.3 percent in the previous quarter. This improvement is largely attributed to the resolution of issues that impacted service reliability in the prior quarter, including dispatching disruptions following BNSF's relocation of its Southern California dispatching functions and widespread vandalism along the corridor, which previously resulted in slow orders and crossing protection measures.

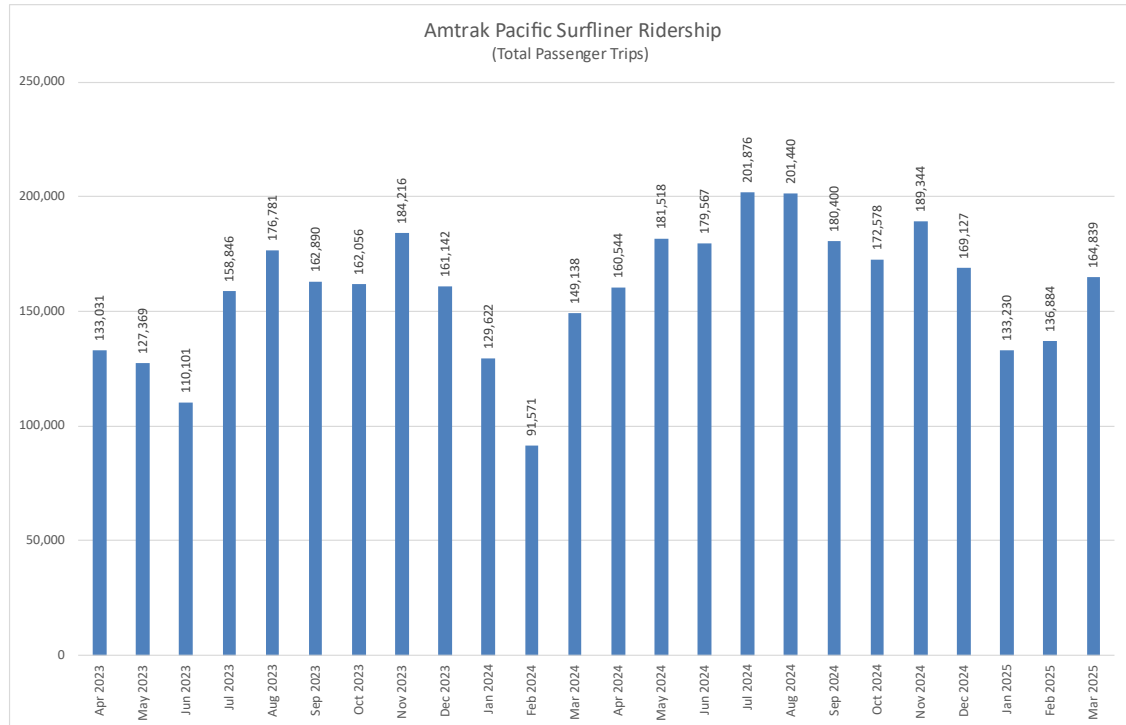
Figure 5: Customer OTP



Ridership

Various passenger related delays may impact train OTP. In general, the higher the systemwide ridership, the higher the incidences of passenger related delays. The chart in Figure 6 shows historical monthly ridership. As shown in Figure 6, for Q3 FY 2024-25, there were 434,953 passenger trips on the Pacific Surfliner, representing a roughly 18.1 percent decrease from 531,049, passenger trips in the previous quarter. The decrease in ridership is primarily attributed to the seasonal trend for Pacific Surfliner service.

Figure 6: Total Monthly Ridership



Systemwide Delays by Responsible Party, Per 10,000 Train Miles

Delay minutes are attributed to a variety of causes, or delay types, using a three-letter coding system. In addition, each delay type is categorized under one of three responsibility groups: Host, Amtrak, or Third Party.

The rate metric of minutes of delay by responsible party per 10,000 train miles is useful for comparing levels of delay for periods or territories that may have differing levels of Pacific Surfliner service. This measure is normalized by dividing the total minutes of delay for all operated trains by the total number of miles traveled by all trains, then multiplying the decimal result by 10,000.

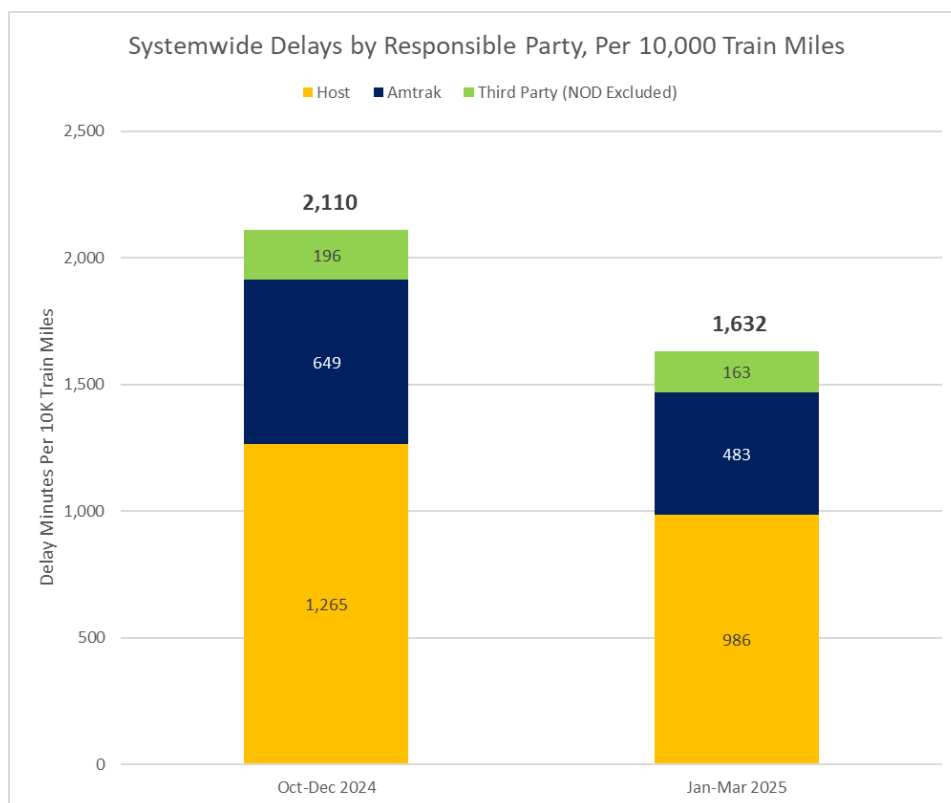
In the third quarter of FY 2024-25, the Pacific Surfliner operated a total of 338,917 train miles, representing an 8.5 percent decrease from the 370,333 train miles operated in the previous quarter.

Host-responsible delay types (shown in yellow in Figure 8) continue to be the largest category of delay types for the entire Pacific Surfliner, followed by Amtrak-related delays (shown in blue), then third party (shown in green). While minutes of unused recovery time (coded as NOD) are included in the raw data set used for delay analyses, they are excluded from delay analyses, since NOD is not actually

a delay, and just represents the minutes a train spends waiting to avoid operating ahead of schedule.

Overall, for Q3 FY 2024-25, there were 1,632 minutes of delay per 10,000 train miles, representing a 22.7 percent decrease in the overall delay rate compared to Q2 FY 2024-25. The rate of host-responsible delays decreased by 22.1 percent, the rate of Amtrak-responsible delays decreased by 25.6 percent, and the rate of third party-responsible delays decreased by 16.8 percent. The decrease in delays is attributed to a decrease in passenger-related, commuter train interference, and signal related delays.

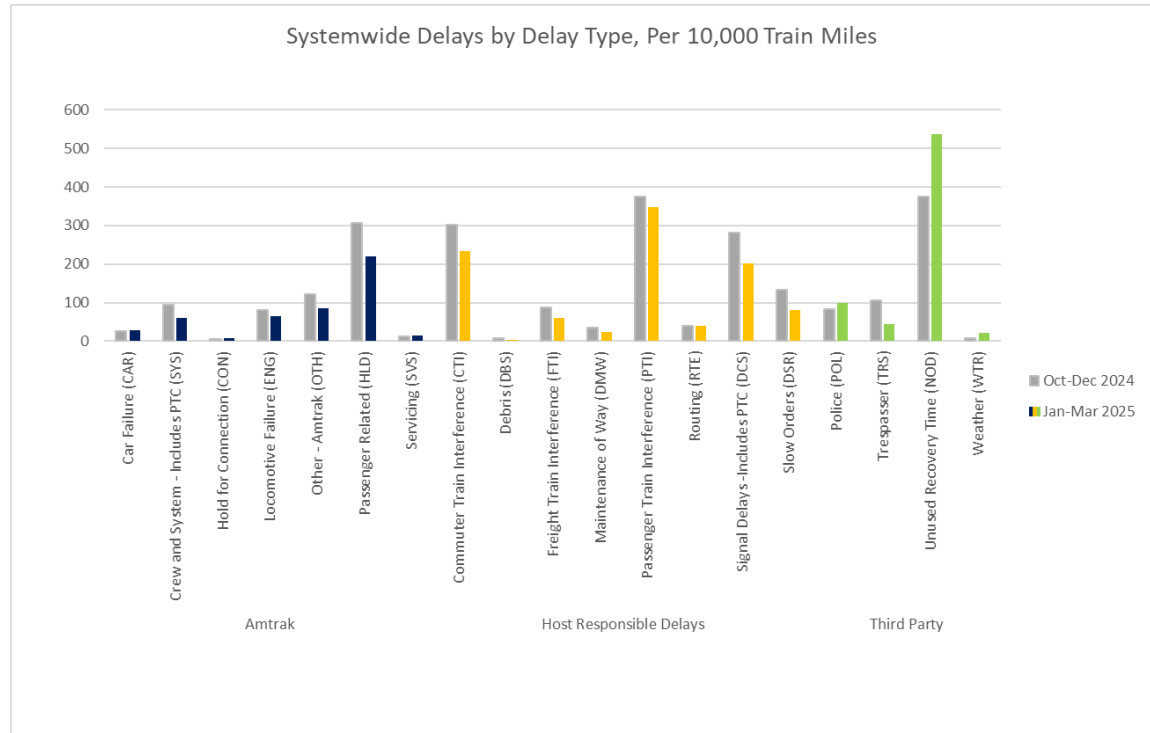
Figure 8: Systemwide Delays by Responsible Party, Per 10,000 Train Miles



Systemwide Delays by Delay Type, Per 10,000 Train Miles

During the third quarter of FY 2024-25, the most significant individual delays were categorized as host-responsible and Amtrak delays, specifically passenger train interference, commuter train interference, and passenger-related delays.

Figure 9: Systemwide Delays by Delay Type, Per 10,000 Train Miles



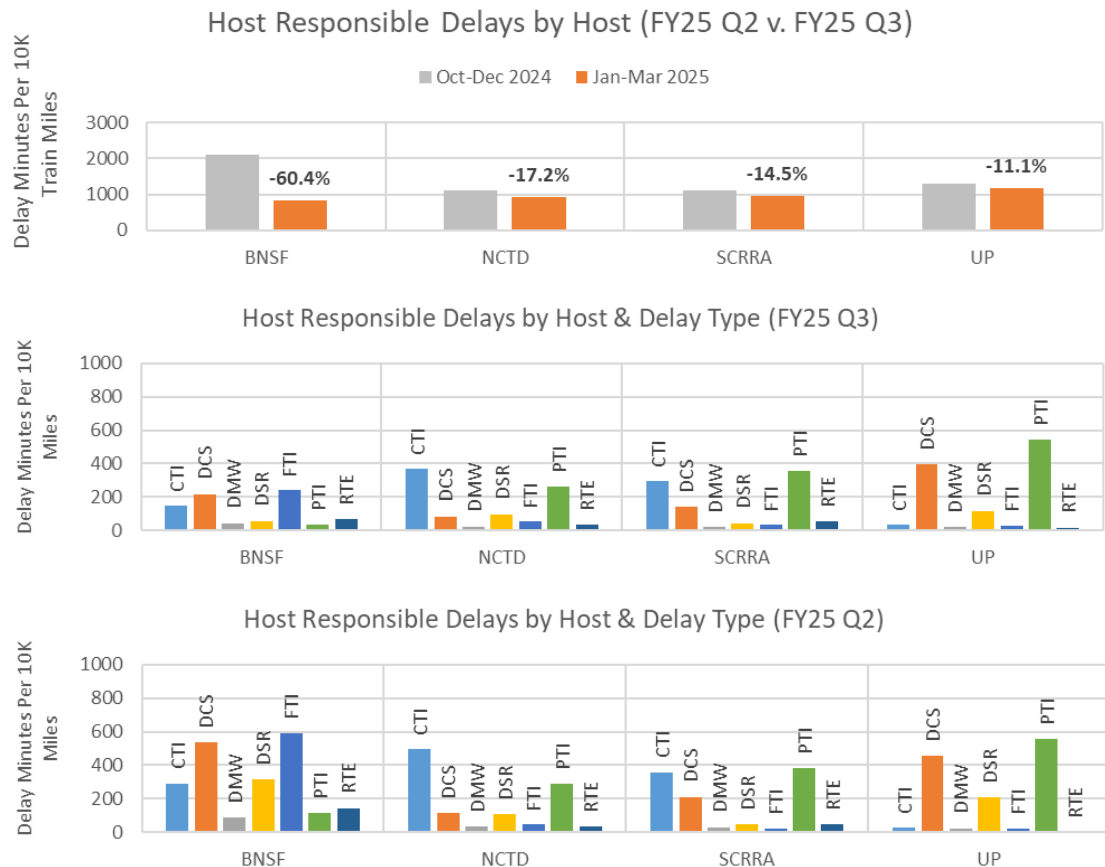
Host-Responsible Delays, Per 10,000 Train Miles

Each host territory location is unique and has its own pattern of challenges to be monitored. Figure 10 has three charts showing only host-responsible delays per 10,000 train miles, by host railroad. Overall, for Q3 FY 2024-25, the host-responsible delay rate within BNSF territory decreased by 60.4 percent, in NCTD territory decreased by 17.2 percent, in SCRRA territory decreased by 14.5 percent. and in UPRR territory decreased by 11.1 percent.

The second chart in Figure 10 clearly illustrates what the prominent delay contributors¹ were within each host territory in Q3 FY 2024-25. In BNSF territory, the top delay types were signal delays and freight train interference. In NCTD and SCRRA territory, the top delay types were commuter train interference and passenger train interference. In UP territory, the top delay types were signal delays and passenger train interference.

¹ Refer to Figure 9 for definitions of three-letter delay codes.

Figure 10: Host-Responsible Delays, Per 10,000 Train Miles

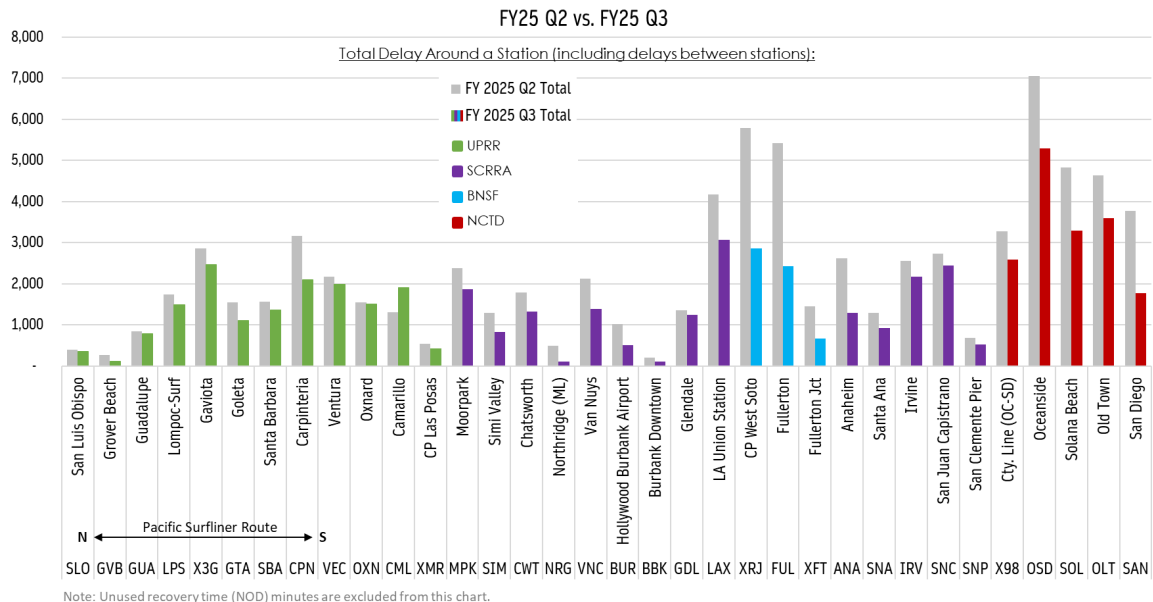


Total Delays Around Stations (or Other Specific Locations)

Figure 11 shows total minutes of delay along the entire 351-mile route, for all Pacific Surfliner trains combined. The bars include colors that represent the total minutes of delay around a station for Q3 FY 2024-25, and the gray bars show the same for the previous quarter. Delays between stations were allocated to the starting station of the delay. For example, whether a train was traveling northbound from Solana Beach to Oceanside, or southbound from Solana Beach to San Diego-Old Town, the delay minutes in both examples would be allocated to Solana Beach.

Overall, total minutes of systemwide delay decreased by 29.1 percent, from 79,068 in Q2 of FY 2024-25, to 56,052 in Q3 of FY 2024-25. The top three delay station locations were Oceanside, Old Town, and Solana Beach.

Figure 11: Total Delays Around Stations (or Other Specific Locations)



Summary

Within the third quarter of FY 2024-25, the Amtrak Pacific Surfliner achieved an average systemwide endpoint on-time performance score of 83.1 percent, which is below the 90 percent standard. Most delay types fell under the host responsibility category. The top individual delay types, regardless of responsibility category, were passenger train interference, commuter train interference, and passenger-related delays.

Attachment

None.


Approved by:

Kristopher Ryan
Chief Finance Officer
(714) 560-5409



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director 

Subject: Fiscal Year 2024-25 Third Quarter Budget Status Report

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's Fiscal Year 2024-25 budget was approved by the Board of Directors on March 18, 2024. The California State Transportation Agency approved the Fiscal Year 2024-25 budget and funding on September 26, 2024. This report summarizes financial activities and performance through the third quarter of Fiscal Year 2024-25, covering the months of January 2025 through March 2025.

Recommendation

Receive and file as an information item.

Background

On March 18, 2024, the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) Board of Directors (Board) approved the LOSSAN Agency Annual Business Plan for Fiscal Year (FY) 2024-25 and FY 2025-26 (Business Plan), as well as the FY 2024-25 budget. Included in both the adopted budget and the Business Plan is funding for FY 2024-25 administrative and marketing services, in the amount of \$9.4 million and \$53.3 million, for net train operations (including \$57,000 for the continuation of the transit transfer program), \$0.5 million for minor capital projects, and \$75.0 million for grant programs bringing the total adopted budget to \$138.2 million.

Discussion

The quarterly budget status report provides an overview of all financial activity, including a comparison of budget to actuals, and explanations for variances throughout the report period. While the details can be found in Attachment A, a summary is below.

Revenues

As shown in Table 1, budgeted revenues through the third quarter of FY 2024-25 totaled \$69.0 million, while actual revenues totaled \$70.3 million. This results in year-to-date (YTD) revenues overrunning the budget by \$1.3 million.

The variance in the quarterly budget is primarily driven by fluctuations in Other State Funding, which includes all capital project funds. Total grant revenue is \$6.1 million below budget due to project delays and the timing of invoice

receipts and data preparation for on-time performance invoices. This shortfall is partially offset by the receipt of four quarterly SRA deposits totaling \$11.6 million. The timing of these deposits is unpredictable, as the State does not provide advance notice. Additionally, State Operating Funding is \$5.4 million above budget, primarily due to the early receipt of the April 2025 advance payment.

The budget variances are further detailed in Attachment A.

Expenses

As shown in Table 2, budgeted expenses through the third quarter of FY 2024-25 totaled \$59.8 million, whereas actual expenses totaled \$53.0 million, resulting in an underrun of \$6.8 million.

The majority of the expense variance is associated with grant-funded capital projects. This is primarily due to delays in invoicing and project completion. Key contributors include \$1.4 million in North County Transit District and \$1.1 million in Union Pacific

Railroad on-time performance incentives, along with delays in several design projects totaling roughly \$2 million. Specifically, these delays include design work for the Camarillo Station improvements, Central Coast Layover Facility, Goleta

TABLE 1: REVENUES	FY 2024-25	FY 2024-25	
	Working Budget	Actuals	\$ Variance
	Year-To-Date	Year-To-Date	Year-To-Date
State Administrative Funding	\$ 5,527,575	\$ 6,654,477	\$ 1,126,902
State Marketing Funding	\$ 2,000,000	\$ 2,000,000	\$ -
State Operating Funding	\$ 39,987,870	\$ 45,451,202	\$ 5,463,332
Other State Funding	\$ 21,000,000	\$ 14,921,935	\$ (6,078,065)
State Capital Funding	\$ 500,000	\$ -	\$ (500,000)
Interest Revenue	\$ -	\$ 1,290,834	\$ 1,290,834
Other Revenue	\$ -	\$ 12,000	\$ 12,000
Total Revenues	\$ 69,015,445	\$ 70,330,447	\$ 1,315,002

TABLE 2: EXPENSES	FY 2024-25	FY 2024-25	
	Working Budget	Actuals	\$ Variance
Administrative Budget Line Items	Year-To-Date	Year-To-Date	Year-To-Date
Administration - Staffing	\$ 3,009,600	\$ 2,334,368	\$ 675,232
Legal Services	\$ 56,250	\$ 28,023	\$ 28,227
Travel	\$ 40,950	\$ 40,450	\$ 500
Marketing	\$ 1,526,850	\$ 717,397	\$ 809,453
Insurance	\$ 77,200	\$ 70,118	\$ 7,082
Contracted services	\$ 828,700	\$ 218,455	\$ 610,245
Dues & Memberships	\$ 9,000	\$ 10,519	\$ (1,519)
Non Budgeted Expenses	\$ -	\$ -	\$ -
Other Business Expenses	\$ 1,875	\$ 20,398	\$ (18,523)
Total Administrative Services	\$ 5,550,425	\$ 3,439,729	\$ 2,110,697
Operating/Capital Budget Line Items			
Net Train Operating Expenses	\$ 39,945,120	\$ 40,323,312	\$ (378,192)
Transit Transfer Program	\$ 42,750	\$ 31,205	\$ 11,545
Minor Capital Projects	\$ 500,000	\$ 2,074	\$ 497,926
Grant Programs	\$ 13,760,000	\$ 9,199,327	\$ 4,560,673
Total Budget	\$ 59,798,295	\$ 52,995,647	\$ 6,802,649

Layover Facility, and Leesdale Siding. Additionally, Marketing, Contracted Services, and Minor Capital projects primarily underran due to lower than anticipated expenditures throughout the fiscal year. Also contributing to the underrun is the timing of invoices processed. Although expenses are expected to underrun through the end of the fiscal year, there is expected to be an increase in spending in the fourth quarter.

For detailed information on other areas experiencing budget variances, please refer to Attachment A.

The LOSSAN Agency bylaws also require a quarterly report to be filed with the Board reporting the amount of money held, the amount and source of receipts since the last report, the amount and recipient of the amounts paid out since the last report, and a report of all expenditures under \$100,000. This report is included as Attachment B.

The LOSSAN Board has directed staff to provide a listing of all open agreements, including vendor, description of purchase, contract number, contract amount, amount spent, remaining balance, and expiration date on a quarterly basis. The report is provided as Attachment C.

Summary

Through the third quarter of Fiscal Year 2024-25, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's actual revenues and expenses remain below budget. Most of the variance is due to the timing of invoicing, as reimbursements from the State are contingent on the receipt and payment of UPRR invoices, along with project delays related to design review.

Attachments

- A. Quarterly Budget Status Report, Third Quarter of Fiscal Year 2024-25
- B. Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency, Third Quarter Financial Activity Report, Fiscal Year 2024-25
- C. Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency, Open Agreements Listing as of March 31, 2025

Approved by:



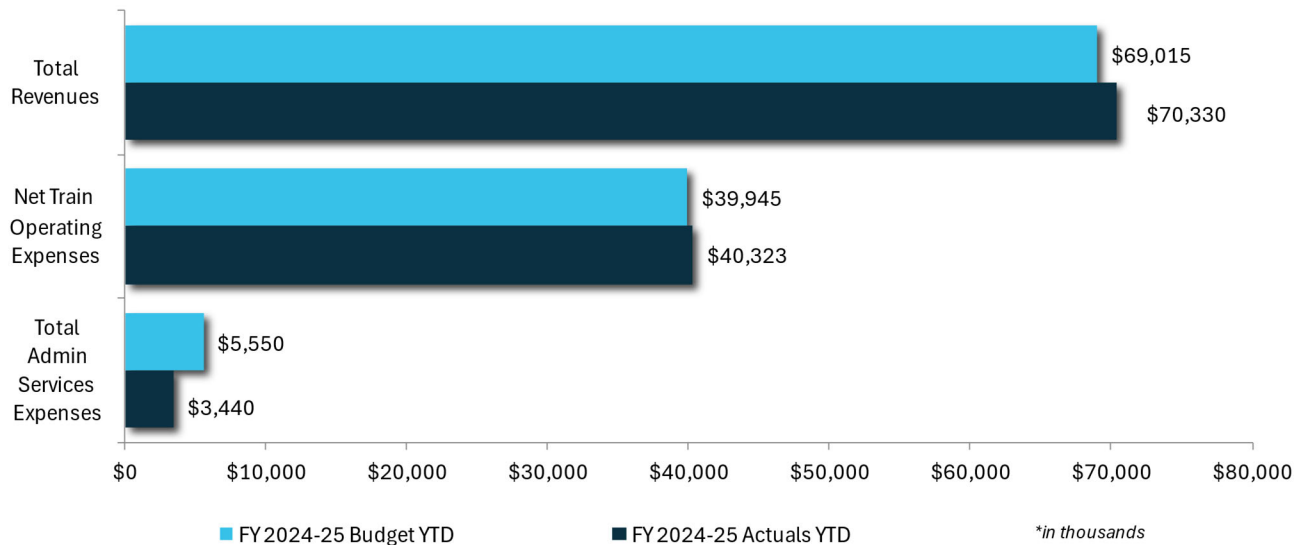
Kristopher Ryan
Chief Financial Officer
(714) 560-5409



Quarterly Budget Status Report

Third Quarter of Fiscal Year 2024-25

FY 2024-25 Budget to Actuals Year-To-Date



OVERVIEW

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) Business Plan for Fiscal Year (FY) 2024-25 and FY 2025-26 (Business Plan), and the FY 2024-25 budget were approved at the March 18, 2024 Board of Directors (Board) meeting. The business plan was submitted to the Secretary of the California State Transportation Agency on April 1, 2024, as required by the interagency transfer agreement and LOSSAN joint powers agreement.

The Board-approved FY 2024-25 Business Plan and budget is \$138.2 million. This includes funding for administrative and marketing services in the amount of \$9.4 million, and \$53.3 million for net train operations (which includes \$57,000 for the continuation of the transit transfer program), \$0.5 million for minor capital projects, and \$75.0 million for grant programs.

Amtrak operates on a Federal Fiscal Year (FFY) of October through September and the operating contract is executed on an FFY basis. The LOSSAN Agency operates on a FY between July and June.

The FY 2024-25 adopted budget assumes the California Department of Transportation (Caltrans) Division of Rail will directly fund equipment capital charges for the Amtrak-owned railcars and locomotives used on the three state-supported

corridors. As a result, equipment capital charges are not included in the operating agreement between Amtrak and the LOSSAN Agency.

This report highlights the major variances between the budget and actual revenues and expenses through the third quarter (January 2025 through March 2025) of FY 2024-25.

REVENUES

Budgeted revenues through the third quarter of FY 2024-25 total \$69.0 million, as presented in **Table 1: Revenues** under “FY 2024-25 Working Budget Year-To-Date”. Actual Year-To-Date revenues through the third quarter totaled \$70.3 million. This is a positive variance of \$1.3 million.

Other state funding (grant revenue) has an underrun of \$6,078,065 primarily due to project delays and the timing of reimbursements from Caltrans for on-time performance invoices. Since project expenses must be incurred before invoicing the State for reimbursement, there is typically a 45 day period paying contractors and receiving funds. For example, reimbursement for invoices related to Union Pacific Railroad (UPRR) on-time performance incentives (\$4.7 million), and

TABLE 1: REVENUES

	FY 2024-25 Adopted Budget	FY 2024-25 Working Budget ³	FY 2024-25 Working Budget Year-To-Date	FY 2024-25 Actuals Year-To-Date	\$ Variance Year-To-Date	% Variance Year-To-Date	FY 2024-25 Percent of Budget Used-to-Date
State Administrative Funding	\$ 7,370,100	\$ 7,370,100	\$ 5,527,575	\$ 6,654,477	\$ 1,126,902	20.4%	90.3%
State Marketing Funding	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ -	0.0%	100.0%
State Operating Funding	\$ 53,317,160	\$ 53,317,160	\$ 39,987,870	\$ 45,451,202	\$ 5,463,332	13.7%	85.2%
Reimbursements from other Agencies	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A
Other State Funding ¹	\$ 74,995,000	\$ 74,995,000	\$ 21,000,000	\$ 14,921,935	\$ (6,078,065)	-28.9%	19.9%
State Capital Funding ²	\$ 500,000	\$ 500,000	\$ 500,000	\$ -	\$ (500,000)	-100.0%	0.0%
Amtrak Penalty & Assessment Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A
Net State/Other Agency Funded	\$ 138,182,260	\$ 138,182,260	\$ 69,015,445	\$ 69,027,613	\$ 12,168	-94.9%	295.4%
Interest Revenue	\$ -	\$ -	\$ -	\$ 1,290,834	\$ 1,290,834	N/A	0.0%
Other Revenue	\$ -	\$ -	\$ -	\$ 12,000	\$ 12,000	N/A	N/A
Total Revenues	\$ 138,182,260	\$ 138,182,260	\$ 69,015,445	\$ 70,330,447	\$ 1,315,002	1.9%	50.9%

¹ Includes Transit & Intercity Rail Capital Program, California Transit Security Grant Program, State Rail Assistance, State Transportation Improvement Program Funds and Proposition 1B grant programs

² Includes State Minor projects funding

³ Working budget is the adopted budget plus any amendments approved during the year. Adjusted for prior year accruals.

North County Transit District (NCTD) on-time performance incentives (\$2.1 million) have invoices processed in the fourth quarter. In addition, there have been multiple design delays throughout the review and approval process for projects such as Central Coast Layover Facility (\$5.4 million), Goleta Layover Facility (\$2.4 million) and Camarillo Station Improvements (\$1.1 million). This underrun is offset by the receipt of four quarterly SRA deposits from the State, totaling \$11,572,430. The timing of these deposits is unpredictable, as the State does not provide advance notice.

State administrative funding is overrunning the budget by \$1.1 million due to the receipt of the second half payment for fiscal year 2024 in the current FY. The State disburses administrative funding in two separate payments, typically issuing one half at the beginning of the fiscal year and the other half toward the end.

State operating funding is overrunning the budget by \$5.5 million primarily due to the April 2025 advance payment receipt in March 2025. LOSSAN can invoice the State up to 30 days before paying the monthly invoice to Amtrak, ensuring sufficient funding is available to cover these payments.

Total passenger revenue for the third quarter reached \$55.0 million, reflecting a 14.8% increase compared to the same period last year (\$47.9 million). This growth is primarily driven by increased demand and the absence of emergency-related service disruptions in San Clemente that occurred in the prior year. However, revenue remains 8.9% below pre-pandemic levels from July–December 2019.

Although passenger revenue is not directly recorded as revenue since it is netted against monthly Amtrak expenses, staff believes it is important to provide this information as it offers valuable insight into the performance of our Pacific Surfliner service.

OPERATING EXPENSES

Budgeted expenses through the third quarter of FY 2024-25 total \$59.8 million, as presented in **Table 2: Expenses** under “FY 2024-25 Working Budget Year-To-Date”. Actual Year-To-Date expenses through the third quarter totaled \$53.0 million. This is a variance of \$6.8 million.

This variance is primarily due to grant-funded capital projects, including \$1.4 million for NCTD on-time performance incentives and \$1.1 million in UPRR on-time performance incentives. This is primarily due to the timing of the receipt of invoices and data preparation. In addition, project delays have contributed to the variance, including design delays for the Camarillo Station improvements at \$1 million, Central Coast Layover Facility at \$0.5 million, Goleta Layover Facility at \$0.2 million, and Leesdale Siding \$0.2 million.

The Marketing budget variance of \$0.8 million is primarily due to an underrun of \$0.4 million in Digital Advertising, resulting from a temporary pause and the use of lower-tier services. Expenses in this category are expected to increase in the fourth quarter. Additional underruns occurred in Creative Services (\$123 thousand), Website Management (\$105 thousand), and Videography Services (\$74 thousand).

The underrun in Contracted Services is primarily due to lower utilization of on-call project management services for capital projects. The use of these services typically aligns with project timelines and evolving requirements.

The underrun in Minor Capital Projects is due to the timing of payments to Amtrak for planned improvements at various station facilities. Based on current project schedules, these expenditures are expected to remain below budget through the end of the fiscal year.

Quarterly Budget Status Report - LOSSAN

Third Quarter of FY 2024-25

TABLE 2: EXPENSES

Administrative Budget Line Items	FY 2024-25 Adopted Budget	FY 2024-25 Working Budget	FY 2024-25 Working Budget Year-To-Date	FY 2024-25 Actuals Year-To-Date	\$ Variance Year-To-Date	% Variance Year-To-Date	FY 2024-25 Percent of Budget Used-to-Date
Administration - Staffing	\$ 6,019,200	\$ 6,019,200	\$ 3,009,600	\$ 2,334,368	\$ 675,232	22.4%	38.8%
Legal Services	\$ 75,000	\$ 75,000	\$ 56,250	\$ 28,023	\$ 28,227	50.2%	37.4%
Travel	\$ 60,000	\$ 60,000	\$ 40,950	\$ 40,450	\$ 500	1.2%	67.4%
Marketing	\$ 2,000,000	\$ 2,000,000	\$ 1,526,850	\$ 717,397	\$ 809,453	53.0%	35.9%
Insurance	\$ 77,200	\$ 77,200	\$ 77,200	\$ 70,118	\$ 7,082	9.2%	90.8%
Contracted Services (Audit, Planning, On-Call)	\$ 1,127,200	\$ 1,127,200	\$ 828,700	\$ 218,455	\$ 610,245	73.6%	19.4%
Dues & Memberships	\$ 9,000	\$ 9,000	\$ 9,000	\$ 10,519	\$ (1,519)	-16.9%	116.9%
Other Business Expenses	\$ 2,500	\$ 2,500	\$ 1,875	\$ 20,398	\$ (18,523)	-987.9%	815.9%
Total Administrative Services	\$ 9,370,100	\$ 9,370,100	\$ 5,550,425	\$ 3,439,729	\$ 2,110,697	38.0%	36.7%

Operating/Capital Budget Line Items	FY 2024-25 Adopted Budget	FY 2024-25 Working Budget	FY 2024-25 Working Budget Year-To-Date	FY 2024-25 Actuals Year-To-Date	\$ Variance Year-To-Date	% Variance Year-To-Date	FY 2024-25 Percent of Budget Used-to-Date
Net Train Operating Expenses	\$ 53,260,160	\$ 53,260,160	\$ 39,945,120	\$ 40,323,312	\$ (378,192)	-0.9%	75.7%
Transit Transfer Program	\$ 57,000	\$ 57,000	\$ 42,750	\$ 31,205	\$ 11,545	27.0%	54.7%
Minor Capital Projects	\$ 500,000	\$ 500,000	\$ 500,000	\$ 2,074	\$ 497,926	99.6%	0.4%
Grant Programs	\$ 74,995,000	\$ 74,995,000	\$ 13,760,000	\$ 9,199,327	\$ 4,560,673	33.1%	12.3%
Total Operating/Capital Budget	\$ 128,812,160	\$ 128,812,160	\$ 54,247,870	\$ 49,555,918	\$ 4,691,952	8.6%	38.5%

Total Budget	\$ 138,182,260	\$ 138,182,260	\$ 59,798,295	\$ 52,995,647	\$ 6,802,649	11.4%	38.4%
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¹ Includes Transit & Intercity Rail Capital Program, California Transit Security Grant Program, State Rail Assistance, State Transportation Improvement Program Funds and Proposition 1B grant programs
Working budget is the adopted budget plus any amendments approved during the year. Actuals year to date include encumbrances. Adjusted for prior year accruals.



Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Third Quarter Financial Activity Report
Fiscal Year 2024-25

Date	Check #	Payee	Debit	Credit	Balance	Date Cleared
January						
1/1/2025	Balance	Bank Account Balance Forward			58,247,635.35	1/1/2025
1/2/2025	00001760	Deputy Managing Director - Travel	444.55		58,247,190.80	1/3/2025
1/3/2025	Wire	Deposit - State Operating Advance - December and January		8,946,168.00	67,193,358.80	1/3/2025
1/6/2025	Wire	Bank of the West - Credit Card Charges Various	1,290.68		67,192,068.12	1/6/2025
1/7/2025	00001762	Google - Advertising	399.76		67,191,668.36	1/13/2025
1/7/2025	00001763	Abbi Agency - Digital Marketing Services and Field Marketing Services	20,102.50		67,171,565.86	1/16/2025
1/8/2025	00001761	Deutsche Bahn Engineering and Consulting - Corridor Optimization	45,000.00		67,126,565.86	1/16/2025
1/13/2025	00000087	Facebook - Advertising	4,235.60		67,122,330.26	1/13/2025
1/14/2025	00001766	Marsh Risk and Insurance - Insurance	69,117.97		67,053,212.29	1/22/2025
1/15/2025	00001764	ACE Agency - Professional Services	4,291.25		67,048,921.04	1/22/2025
1/15/2025	00001765	Deutsche Bahn Engineering and Consulting - Corridor Optimization	50,000.00		66,998,921.04	1/23/2025
1/15/2025	00001767	Oak Leaf - Digital Videos and Photos for marketing	900.00		66,998,021.04	1/28/2025
1/21/2025	00001768	Gold Coast Transit District - Transit Transfer Program	675.22		66,997,345.82	2/4/2025
1/21/2025	00001769	Amtrak - Bus Bridges	83,393.19		66,913,952.63	2/3/2025
1/22/2025	Wire	Deposit - State Operating Advance - February and Camarillo Station Improvements May 2023-June 2024		5,055,259.00	71,969,211.63	1/22/2025
1/23/2025	Wire	Deposit - Visit Ventura Train Wrap		12,000.00	71,981,211.63	1/23/2025
1/28/2025	00001770	Equipment and Mechanical Manager - Travel	615.45		71,980,596.18	2/12/2025
1/28/2025	00001771	Operations, Compliance & Safety Manager - Travel	410.25		71,980,185.93	2/10/2025
1/28/2025	00001772	Oak Leaf - Digital Videos and Photos for marketing	2,400.00		71,977,785.93	2/5/2025
1/28/2025	00001773	County of Santa Barbara - Notice of Exemption for the Ortega Siding Project Filing Fee	50.00		71,977,735.93	2/6/2025
1/28/2025	00001774	Abbi Agency - Digital Marketing Services	11,675.00		71,966,060.93	2/10/2025
1/28/2025	00001775	Woodruff, Spradlin & Smart - December - Legal Services	2,707.50		71,963,353.43	2/3/2025
1/28/2025	00001776	Zephyr - Leesdale Siding Extension Project	46,493.59		71,916,859.84	2/3/2025
1/31/2025	Wire	Bank of the West - January Interest		168,710.52	72,085,570.36	1/31/2025
February						
2/1/2025	Balance	Bank Account Balance Forward			72,085,570.36	2/1/2025
2/4/2025	Wire	Bank of the West - Credit Card Charges Various	3,732.71		72,081,837.65	2/4/2025
2/6/2025	00001777	HDR Engineering - Central Coast Layover Facility PR&ED (Grant Funded)	13,027.49		72,068,810.16	3/4/2025
2/4/2025	00001778	Nansen - Web Marketing Services	17,597.00		72,051,213.16	2/21/2025
2/4/2025	00001779	Amtrak - Del Mar Bluffs	125,431.33		71,925,781.83	2/28/2025
2/4/2025	00001780	Railpros - Project Management Consulting Services	111,037.57		71,814,744.26	2/12/2025



Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Third Quarter Financial Activity Report
Fiscal Year 2024-25

Date	Check #	Payee	Debit	Credit	Balance	Date Cleared
2/4/2025	00001781	Regional Transit Authority - Transit Transfer Program	3.32		71,814,740.94	2/12/2025
2/4/2025	00001782	San Joaquin JPA Federal Rail Advocacy Services	13,333.32		71,801,407.62	2/21/2025
2/4/2025	00001783	Santa Barbara Metropolitan Transit District - Transit Transfer Program	757.50		71,800,650.12	2/12/2025
2/4/2025	00001784	South County Area Transit - Transit Transfer Program	4.20		71,800,645.92	2/12/2025
2/4/2025	00001785	Union Pacific Railroad - Leesdale Siding Extension Project	20,827.63		71,779,818.29	2/28/2025
2/6/2025	Wire	Deposit - State Operating Advance - March		4,700,088.00	76,479,906.29	2/6/2025
2/14/2025	Wire	Deposit - Reimbursement for Registration		1,840.74	76,481,747.03	2/14/2025
2/18/2025	00001786	ACE Agency - Professional Services	2,955.00		76,478,792.03	2/26/2025
2/18/2025	00001787	Anaheim Transportation Network - Transit Transfer Program	3,740.00		76,475,052.03	2/25/2025
2/18/2025	00001788	Senior Program Manager - Travel	10.00		76,475,042.03	3/21/2025
2/18/2025	00001789	Google - Advertising	396.07		76,474,645.96	2/24/2025
2/19/2025	00001790	HDR Engineering - Central Coast Layover Facility PR&ED (Grant Funded)	24,882.81		76,449,763.15	2/27/2025
2/19/2025	00001791	Program Manager, Finance/Grants - Travel	603.07		76,449,160.08	3/3/2025
2/19/2025	00001792	Managing Director - Travel	1,532.87		76,447,627.21	2/28/2025
2/18/2025	00001793	Amtrak - Goleta	19,867.34		76,427,759.87	2/27/2025
2/18/2025	00001794	North County Transit District Increased Service Frequencies & On-Time Performance	785,053.72		75,642,706.15	2/28/2025
2/19/2025	00001795	OCTA Administrative Services July - December	2,335,142.50		73,307,563.65	2/26/2025
2/19/2025	00001796	States For Passenger Rail Coalition - Membership Dues	7,000.00		73,300,563.65	3/4/2025
2/18/2025	00001797	Abbi Agency - Digital Marketing Services	11,177.50		73,289,386.15	2/26/2025
2/18/2025	00001798	Union Pacific Railroad - San Luis Obispo Layover Facility	8,740.87		73,280,645.28	2/26/2025
2/19/2025	00001799	Zephyr - Leesdale Siding Extension Project	23,308.36		73,257,336.92	2/24/2025
2/20/2025	00000088	Facebook - Advertising	4,089.57		73,253,247.35	2/20/2025
2/26/2025	00001800	Senior Program Manager - Travel	1,163.46		73,252,083.89	3/21/2025
2/28/2025	Wire	Deposit - Transit and Intercity Rail Capital Program (TIRCP) Union Pacific Railroad Funded Projects and NCTD OTP Incentive July to September 2024		3,538,162.79	76,790,246.68	2/28/2025
2/28/2025	Wire	Bank of the West - February Interest		171,663.37	76,961,910.05	2/28/2025
March						
3/1/2025	Balance	Bank Account Balance Forward			76,961,910.05	3/1/2025
3/3/2025	Wire	Deposit - State Rail Assistance Funds		1,920,569.88	78,882,479.93	3/3/2025
3/5/2025	00001801	Equipment and Mechanical Manager - Travel	238.56		78,882,241.37	3/17/2025
3/5/2025	00001803	Deputy Managing Director - Travel	602.97		78,881,638.40	3/7/2025
3/5/2025	00001804	Senior Finance & Administration Manager - Travel	857.68		78,880,780.72	3/6/2025
3/5/2025	00001805	Abbi Agency - Digital Marketing Services	14,487.50		78,866,293.22	3/14/2025
3/6/2025	00001802	Hanson Bridgett - March - Legal Services	2,970.45		78,863,322.77	3/11/2025



Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Third Quarter Financial Activity Report
Fiscal Year 2024-25

Date	Check #	Payee	Debit	Credit	Balance	Date Cleared
3/6/2025	00001806	Senior Accounting Analyst - Travel	852.84		78,862,469.93	3/11/2025
3/7/2025	Wire	Bank of the West - Credit Card Charges Various	8,614.57		78,853,855.36	3/7/2025
3/12/2025	00001807	Google - Advertising	393.21		78,853,462.15	3/17/2025
3/12/2025	00001808	Orange County Transportation Authority - Transit Transfer Program	9,289.83		78,844,172.32	3/18/2025
3/12/2025	00001809	Abbi Agency - Digital Marketing Services	3,526.50		78,840,645.82	3/21/2025
3/12/2025	00001810	Woodruff, Spradlin & Smart - January - Legal Services	483.60		78,840,162.22	3/17/2025
3/13/2025	00000089	Facebook - Advertising	4,169.49		78,835,992.73	3/13/2025
3/13/2025	00000090	Amtrak Train Service - October-March Operating	25,003,744.70		53,832,248.03	3/13/2025
3/18/2025	Wire	Deposit - State Operating Advance - April		4,570,511.00	58,402,759.03	3/18/2025
3/18/2025	00001811	ACE Agency - Professional Services	3,561.25		58,399,197.78	3/27/2025
3/18/2025	00001812	Executive Administrative Assistant - Travel	317.80		58,398,879.98	3/26/2025
3/18/2025	00001813	Equipment and Mechanical Manager - Travel	260.96		58,398,619.02	4/4/2025
3/18/2025	00001814	Crowe LLC - Professional Audit Services	39,100.00		58,359,519.02	3/25/2025
3/18/2025	00001817	Railpros - Project Management Consulting Services	29,214.72		58,330,304.30	Uncashed
3/18/2025	00001818	San Joaquin JPA Federal Rail Advocacy Services	3,333.33		58,326,970.97	4/4/2025
3/18/2025	00001819	Woodruff, Spradlin & Smart - February - Legal Services	6,026.40		58,320,944.57	3/24/2025
3/19/2025	00001815	Senior Business Unit Analyst - Travel	20.00		58,320,924.57	3/27/2025
3/19/2025	00001816	Jacobs Project Management Co - Central Coast Layover Facility Project	26,392.70		58,294,531.87	4/21/2025
3/25/2025	00001820	HDR Engineering - Central Coast Layover Facility PR&ED (Grant Funded)	26,674.01		58,267,857.86	4/1/2025
3/25/2025	00001821	Amtrak - Del Mar Bluffs	150,157.15		58,117,700.71	4/2/2025
3/25/2025	00001822	North County Transit District - Transit Transfer Program	1,096.81		58,116,603.90	4/1/2025
3/25/2025	00001823	Abbi Agency - Digital Marketing Services	29,579.40		58,087,024.50	4/8/2025
3/25/2025	00001824	Zephyr - Leesdale Siding Extension Project	118,928.29		57,968,096.21	4/1/2025
3/27/2025	00000091	Amtrak Train Service - April Operating	4,726,211.00		53,241,885.21	3/27/2025
3/27/2025	00000092	Union Pacific Railroad On-Time Performance	6,810,445.30		46,431,439.91	3/27/2025
3/31/2025	Wire	Bank of the West - March Interest		154,895.65	46,586,335.56	3/31/2025

**Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Open Agreements Listing as of March 31, 2025**

ATTACHMENT C

Agreement Number	VENDOR	DESCRIPTION	EFFECTIVE	TERMINATES	CONTRACT AMOUNT	AMOUNT PAID TO DATE	CONTRACT BALANCE	CONTRACT STATUS
C-4-1816 ¹	Woodruff & Smart	Professional legal services. Piggyback off of Orange County Transportation Authority's (OCTA) contract	7/1/15	6/30/2029	\$472,000	\$422,855	\$49,145	OPEN
L-0-0006	Union Pacific Rail Road Corporation	Capital Improvement Program to Implement Additional Round trips on Northern Corridor	12/1/2019	N/A	\$108,100,000	\$77,053,232	\$31,046,769	OPEN
L-0-0015	RailPros Inc.	Provide program management consultant services on an as-needed basis	4/6/2021	3/31/2026	\$4,299,999	\$2,059,195	\$2,240,804	OPEN
L-1-0002	Union Pacific Railroad Company	Preliminary engineering services for a short-term and interim expansion of the existing layover facility in San Luis Obispo	3/17/2022	6/30/2025	\$350,000	\$86,206	\$263,794	OPEN
L-1-0003	Jacobs Project Management Co.	On-call construction management services for capital infrastructure projects	3/20/2023	3/19/2028	\$3,844,230	\$30,177	\$3,814,053	OPEN
L-2-0002	The ACE Agency	Public Relations and Media Outreach Services	8/25/2022	8/31/2025	\$146,250	\$135,913	\$10,337	OPEN
L-2-0003	Marsh Risk & Ins Services	LOSSAN Insurance Policies for General Liability, Excess Liability, Commercial Crime and Public Entity Liability Insurance	6/30/2022	6/30/2027	\$50,000	\$10,000	\$40,000	OPEN
L-2-0004	HDR Engineering Inc	Preparation of plans, specs, and estimates for Phase 1 of the Central Coast Layover Facility Project	3/1/2023	2/28/2027	\$3,238,968	\$2,159,381	\$1,079,587	OPEN
L-2-0005	North County Transit District	Increased service frequencies including on-time performance payment	1/1/2022	6/30/2025	\$13,776,523	\$11,201,361	\$2,575,162	OPEN
L-2-0007	Union Pacific Railroad Company	Increased service frequencies including on-time performance payment	12/15/2022	12/31/2027	\$64,703,130	\$20,232,589	\$44,470,541	OPEN
L-2-0008	Nansen	Consultant services for website design and development services for the LOSSAN Agency - Pacific Surfliner	5/16/2023	5/15/2026	\$970,050	\$457,634	\$512,416	OPEN
L-2-0010	Oak Leaf Product	Provide video and still photography services including production, editorial, animation, and sound design	4/28/2023	4/30/2026	\$600,000	\$246,833	\$353,167	OPEN
L-2-0011	The Abbi Agency	Provide digital marketing services, including content development, strategic planning, and account management of social media platforms	8/22/2023	7/31/2025	\$431,000	\$295,028	\$135,972	OPEN
L-3-0001	Zephyr Rail	Prepare the plans, specifications, and estimates for the Leesdale siding extension project.	9/6/2023	10/31/2026	\$3,893,052	\$1,684,939	\$2,208,113	OPEN
L-3-0009	Union Pacific Railroad Company	Review designs for the Leesdale Siding Extension Project in Ventura County	1/23/2024	10/31/2026	\$101,000	\$45,367	\$55,633	OPEN
L-3-0010	Union Pacific Railroad Company	Funding amendment to use TIRCP funds for the increased service frequencies including on-time performance payment	12/15/2022	12/31/2027	\$8,140,000	\$0	\$8,140,000	OPEN
L-4-0002	Shift Media Holdings Inc	Annual Subscription for digital asset management platform	3/1/2024	2/28/2025	\$8,400	\$8,400	\$0	OPEN
L-4-0003	BMO Bank	Commercial Banking Services	7/1/2024	8/31/2028	\$2,500	\$0	\$2,500	OPEN
L-4-0004	Amtrak	Agreement with Amtrak for the provision of passenger rail service	10/1/2023	3/31/2025	\$51,027,011	\$49,589,216	\$1,437,795	OPEN
L-4-0005	City Of Camarillo	Cooperative Agreement with City of Camarillo for Pacific Surfliner Transit Transfer Agreement	5/18/2024	5/17/2028	\$1,900,000	\$277,226	\$1,622,774	OPEN
L-4-0008	Sandag	Stabilize Coastal Bluffs as part of a multi-phase program to address coastal resiliency	5/19/2024	6/30/2027	\$2,890,625	REIMBURSEMENT TO LOSSAN	N/A	OPEN
L-4-0014	Crowe LLP	Audit Services for fiscal years ending 3/31/2027	6/28/2024	3/31/2027	\$124,200	\$39,100	\$85,100	OPEN

¹ Woodruff Smart does not have a contract maximum limit. The contract amount is increased annual based on the adopted budget.

Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Open Agreements Listing as of March 31, 2025

Agreement Number	VENDOR	DESCRIPTION	EFFECTIVE	TERMINATES	CONTRACT AMOUNT	AMOUNT PAID TO DATE	CONTRACT BALANCE	CONTRACT STATUS
L-4-0015	Union Pacific Railroad Company	Funding for Stabilization and Resiliency Projects	3/22/2024	3/31/2027	\$10,406,000	\$0	\$10,406,000	OPEN
L-4-0016	The Abbi Agency	Field Marketing and Community Outreach Services for Pacific Surfliner	8/14/2024	6/30/2025	\$550,000	\$41,957	\$508,044	OPEN
L-4-0017	Cision	PR Newswire Services	9/5/2024	9/4/2027	\$81,765	\$27,255	\$54,510	OPEN
L-4-0018	San Joaquin JPA	Cooperative agreement with SJJPA to reimburse SJJPA for project costs associated with Federal legislative advocacy services	8/1/2024	6/30/2026	\$90,000	\$16,667	\$33,333	OPEN
L-4-0020	Marsh Risk & Ins Services	LOSSAN Insurance Policies for General Liability, Excess Liability, Commercial Crime and Public Entity Liability Insurance	12/1/2024	12/1/2025	\$69,118	\$69,118	\$0	OPEN
L-4-0021	Amtrak	Agreement with Amtrak for the provision of passenger rail service	10/1/2024	9/30/2025	\$52,193,385	\$26,194,834	\$25,998,551	OPEN
L-5-0002	N/A	Joint Powers Agreement Concerning the LOSSAN Agency	N/A	N/A	N/A	N/A	N/A	OPEN
L-5-0013	Editshare Inc.	Annual Subscription for digital asset management platform	2/25/2025	1/31/2026	\$8,400	\$0	\$8,400	OPEN
L-6-0005	Santa Barbara Metropolitan Transit District	Cooperative Agreement with Santa Barbara Metropolitan Transit District for Pacific Surfliner Transit Transfer Agreement	6/6/16	6/30/2027	\$211,416	\$96,911	\$114,506	OPEN
L-6-0006	San Luis Obispo Transit	Cooperative Agreement with San Luis Obispo Transit for Pacific Surfliner Transit Transfer Agreement	7/1/16	6/30/2027	\$10,000	\$123	\$9,877	OPEN
L-6-0007	South County Transit	Cooperative Agreement with South County Transit for Pacific Surfliner Transit Transfer Agreement	6/1/16	6/30/2027	\$5,000	\$44	\$4,956	OPEN
L-6-0009	OCTA	Cooperative Agreement with OCTA for Pacific Surfliner Transit Transfer Agreement	6/6/16	6/30/2027	\$194,623	\$134,337	\$60,286	OPEN
L-6-0010	Anaheim Resort Transit	Cooperative Agreement with Anaheim Resort Transit for Pacific Surfliner Transit Transfer Agreement	6/2/16	6/30/2027	\$165,052	\$118,998	\$46,054	OPEN
L-6-0012	Ventura County Transportation Commission	Cooperative Agreement with Ventura County Transportation Commission for Pacific Surfliner Transit Transfer Agreement	6/1/16	6/30/2027	\$99,963	\$57,899	\$42,064	OPEN
L-6-0013	Gold Coast Transit	Cooperative Agreement with Gold Coast Transit for Pacific Surfliner Transit Transfer Agreement	7/1/16	6/30/2027	\$20,000	\$11,976	\$8,024	OPEN
L-6-0015	San Luis Obispo Regional Transportation Authority	Cooperative Agreement with San Luis Obispo Regional Transportation Authority for Pacific Surfliner Transit Transfer Agreement	6/1/16	6/30/2027	\$18,076	\$154	\$17,921	OPEN
L-6-0016	Glendale Beeline	Cooperative Agreement with Glendale Beeline for Pacific Surfliner Transit Transfer Agreement	6/22/16	6/30/2027	\$37,500	\$12,054	\$25,446	OPEN
L-6-0017	North County Transit District	Cooperative Agreement with North County Transit District for Transit Transfer Agreement	6/6/16	6/30/2027	\$95,000	\$28,104	\$66,896	OPEN
L-8-0009	California Department of Transportation	Interagency Transfer Agreement Between State of California Department of Transportation and Los Angeles-San Diego-San Luis Obispo Rail Corridor Agency	7/1/18	6/30/2028	N/A	N/A	N/A	OPEN
L-8-0010	OCTA	Managing Agency Agreement for OCTA to provide administrative services to LOSSAN	7/1/18	6/30/2027	Reimbursable Agreement	\$25,692,426	N/A	OPEN
L-9-0001	Amtrak	Design services in support of the expansion of the Pacific Surfliner Layover facility in Goleta	12/11/2019	6/30/2025	\$898,353	\$521,831	\$376,522	OPEN


**Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency
Open Agreements Listing as of March 31, 2025**

Agreement Number	VENDOR	DESCRIPTION	EFFECTIVE	TERMINATES	CONTRACT AMOUNT	AMOUNT PAID TO DATE	CONTRACT BALANCE	CONTRACT STATUS
L-9-0005	Southern California Regional Rail Authority (SCRRA), Amtrak	Rail to Rail Cooperative Agreement with LOSSAN, Metrolink & Amtrak	7/1/2019	6/30/2026	\$1,855,887	No Funds Flow Through LOSSAN	N/A	OPEN



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director 

Subject: Fiscal Year 2024-25 Third Quarter Grant Reimbursement Status Report

Overview

The Quarterly Grant Reimbursement Status Report summarizes grant activities for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency’s Board of Directors. This report focuses on activity for the period of January through March 2025.

Recommendation

Receive and file as an information item.

Discussion

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) has secured approximately \$545.3 million in competitive and formula grant funding from state grant agencies to deliver programs, projects, and services to improve mobility along the LOSSAN rail corridor. The use of these funds is consistent with capital programming policies approved by LOSSAN’s Board of Directors (Board). The quarterly Grant Status Report summarizes awarded/executed, current, and recently closed grant agreements.

Summary of Grant Funding			
Grant Program	Total Award	Reimbursed to Date	Remaining Balance
State Rail Assistance	\$41,954,559	\$10,633,527	\$31,321,032
Transit and Intercity Rail Capital Program	\$366,262,000	\$175,106,598	\$191,155,402
Proposition 1B	\$34,971,000	\$16,104,000	\$18,867,000
State Transportation Improvement Program	\$31,500,000	\$2,449,070	\$29,050,930
Solutions for Congested Corridors Program	\$43,500,000	\$0	\$43,500,000
Restoration & Enhancement Grant Program	\$27,120,363	\$0	\$27,120,363
Total	\$545,307,922	\$204,293,195	\$341,014,727

Awarded/Executed Grant Agreements:

The LOSSAN Agency received the tenth disbursement of formula State Rail Assistance (SRA) funding during the third quarter. The total of the disbursement is approximately \$1.9 million.

In addition, LOSSAN was awarded \$27.1 million from the Federal Railroad Administration (FRA) Restoration and Enhancement Grant Program (R&E Grant) to restore train frequency between Los Angeles and San Diego. This grant partially funds the operation of three roundtrips between Los Angeles and San Diego, increasing frequency to 13 daily Pacific Surfliner roundtrips along this segment and fully restoring service to pre-pandemic service levels.

Current Grant Agreements:

The SRA Program is intended to provide a dependable source of supplemental revenue that is flexible and can be used to fund a variety of rail service improvements.

It is available for both operational and capital improvements through both formula and competitive distribution. LOSSAN's first round of SRA formula funding totaled approximately \$13.9 million. Through the third quarter of fiscal year (FY) 2024-25, approximately \$7.9 million of formula funding has been spent, leaving a balance of \$6 million. Projects approved by California State Transportation Agency (CalSTA) for the first round of SRA funding include:

- Design of the Goleta Layover Facility
- Business Class Refresh
- Viriato Software Maintenance
- Corridor Optimization Software
- San Luis Obispo Tactile and Electrical Repair
- Grover Beach Station Improvements project
- Central Coast Layover Facility
- Franchise Access Fee, Capital Access and Incentive
- Leesdale Siding Extension
- Operation Lifesaver Campaign

The SRA funded Grover Beach Station Improvement, Viriato Maintenance, Corridor Optimization software and Business Class Refresh projects have been completed. These projects and related funding details are listed in Attachment A. In addition to the \$13.9 million in SRA formula funds, the LOSSAN Agency received an additional \$718,750 in SRA competitive funding for the Integrated Wayfinding Signage Upgrade project. Approximately \$265,917 of these competitive funds have been spent, leaving a balance of \$452,833 with completion expected in the next fiscal year.

LOSSAN staff requested allocation disbursements for the second round of SRA formula funds totaling \$29.8 million. The allocation requests cover five new projects that include approximately \$15.4 million for Santa Ynez River/Surf Bridge Replacement, \$7.6 million for Equipment Overhaul and Procurement Matching Funds, \$5.9 million for Corridor Hardening and Safety Improvements, \$550,000 for an Interregional Connectivity Improvement Project, and \$400,000 for a LOSSAN Strategic Plan update. Of the projected \$29.8 million in total Round Two funding, LOSSAN has received approximately \$27.4 million through the third quarter of FY 2024-25. Of the \$27.4 million received, approximately \$2.5 million in formula funding has been spent, leaving a balance of \$24.9 million.

The Transit and Intercity Rail Capital Program (TIRCP) was created to provide grants for capital improvements that modernize California's intercity, commuter, and urban rail systems. The goal of these improvements is the reduction of greenhouse gas emissions and vehicle miles travelled. There are five awarded TIRCP grant agreements, which were awarded by CalSTA in 2016, 2018, 2020, and 2024. During FY 2022-23, The LOSSAN Agency was awarded an additional \$31 million in supplemental funding through the 2023 TIRCP for existing TIRCP projects leveraging federal and local funds reserves. Within the attachments, the supplemental funds are included with the existing projects under the 2018 and 2020 awards. During the second quarter of fiscal year 2025, LOSSAN was awarded \$26.2 million in 2024 TIRCP funds through collaboration with the CRCC.

Of the five awards, four remain active after closing out the 2015 award in 2021. Due to several years of inactivity, the 2015 TIRCP award is excluded from the totals within this report. Currently, the awarded TIRCP grant agreements total \$366.3 million in funding for multiple projects and programs. A total of \$175.1 million has been received to date, leaving a balance of \$191.2 million. The balance of TIRCP grant agreements will facilitate the completion of projects throughout the corridor including:

- Installation of Centralized Traffic Control
- Upgrades and Replacement of Ties, Rail, and Non-Powered Switches
- Signal and Fencing Upgrades
- Station Improvements
- Safety Improvements
- Corridor Hardening Improvements
 - Ventura County Rincon Point Slope Repairs
 - Santa Barbara County Hollister Ranch Repairs and Drilled Piers project
- Bridge Replacements
- Capital Access and On-Time Performance Agreements
- Expansion of the Central Coast Layover in San Luis Obispo
- Phase One of a new San Diego County Maintenance and Layover Facility

- Construction of the Orcutt Road Left-Hand Crossover
- Construction of Ortega Siding

Several of the projects listed above are funded by multiple sources. Installation of Centralized Traffic Control, Upgrades and Replacement of Ties, Rail, and Non-Powered Switches, and the Narlon Bridge Replacement have been completed. Work has continued to make progress on many of the other 2018 TIRCP and 2020 TIRCP funded projects.

The Proposition 1B (Prop 1B) Program, which was approved by voters in November 2006, authorized the issuance of \$19.9 billion in general obligation bonds for specified transportation purposes including: congestion reduction, highway and local road improvements, public transportation, goods movement, air quality, safety and security. In May 2020, the LOSSAN Agency was awarded a total of \$35 million in Prop 1B funding. Through the third quarter of FY 2024-25, approximately \$16.1 million of Prop 1B funding has been spent, leaving a balance of \$18.9 million. The majority of the \$16.1 million spent funded the Los Alamos Creek (Narlon) Bridge, which has been completed and is open to train traffic. Moving forward, Prop 1B will continue to fund the Canada Honda Bridge Replacement, Camarillo Station Improvements, and the Central Coast Layover Facility (CCLF) projects. The Canada Honda Bridge Replacement Project Approval & Environmental Document (PAED) and Plans, specifications, and estimates phases were completed in calendar year 2023 and construction began in April 2024. The new bridge span is expected to be in place and open to train traffic in August 2025.

The State Transportation Improvement Program (STIP) is a five-year plan updated on a biannual basis and adopted by the California Transportation Commission for future allocations of certain state transportation funds for state highway improvements, intercity rail, and regional highway and transit improvements. The CCLF project includes \$11.5 million in STIP funding for the environmental and construction phases. The project is nearing completion of the design phase, with construction expected to begin in late 2025. In addition, \$20 million of STIP funding was programmed from the Capital Reserve Fund to the Leesdale Passing Siding project.

The Solutions for Congested Corridors Program (SCCP) is a statewide, competitive program that provides funding to achieve a balanced set of transportation, environmental, and community access improvements to reduce congestion throughout the state. The final approval of a baseline agreement between applicable agencies for the award of SCCP funding was completed in FY 2023-24. The LOSSAN agency was awarded a total amount of \$43.5 million of SCCP funding. Construction of the Leesdale Passing Siding project is expected to begin in late 2026.

The R&E Grant Program from the FRA is a competitive grant program established to initiate, restore, or enhance intercity passenger transportation operation. In the third quarter of FY 2024-25, LOSSAN was awarded a total of \$27 million of R&E Grant funding, marking its first successful federal grant award. The grant is to help fund the operation of three roundtrips between Los Angeles and San Diego, increasing frequency to 13 daily Pacific Surfliner roundtrips along this segment and fully restoring service to levels that existed on the corridor prior to the COVID-19 pandemic.

Grant Agreements Pending Close-out:

The 2016 TIRCP funded portion for Franchise Access Fee, Cap. Access and Incentive (UPRR) is pending close-out. This project is still ongoing and will continue to be funded utilizing 2018 TIRCP funds.

Grant Agreements Closed Out:

The 2018 TIRCP funded portion to install Centralized Traffic Control and upgrade Non-Powered Switches have been closed out. Savings from these projects have been reprogrammed to the Canada Honda Bridge Replacement project.

Summary

The report provides an update of the grant agreement funded activities for the third quarter of fiscal year 2024-25, January through March 2025. Staff recommend this report be received and filed as an information item.

Attachments

- A. Third Quarter Grant Reimbursement Status Report, LOSSAN Grant Agreements, Formula and Competitive State Rail Assistance (SRA), January through March 2025
- B. Third Quarter Grant Reimbursement Status Report, Transit and Intercity Rail Capital Program (TIRCP), January through March 2025
- C. Third Quarter Grant Reimbursement Status Report, Other Discretionary Grants, January through March 2025
- D. Third Quarter Grant Reimbursement Status Report, Grants Pending Close-out, January through March 2025
- E. Third Quarter Grant Reimbursement Status Report, Grants Close-out, January through March 2025

Approved by:



Russ Henry
Program Manager, Financial Planning and Analysis
(714) 560-5990



**Third Quarter Grant Reimbursement Status Report
LOSSAN Grant Agreements**

Formula and Competitive State Rail Assistance (SRA)

January through March 2025

Fiscal Year 2018 - 2020 Formula

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Goleta Layover Facility Improvements	\$ 718,353	\$ 341,831	\$ 376,522	December 2026
Business Class Refresh	115,812	115,812	-	Project Completed / Closed Out
Viriato Maintenance	260,000	260,000	-	Project Completed / Closed Out
SLO Tactile and Electrical Repair	597,382	-	597,382	December 2025
Corridor Optimization Software	208,000	208,000	-	Project Completed / Closed Out
Grover Beach Station Improvements	400,000	400,000	-	Project Completed / Closed Out
Central Coast Layover Facility	1,210,000	561,407	648,593	August 2025
Franchise Access Fee, Cap. Access and Incentive (UPRR)	4,170,000	4,170,000	-	Project Completed / Closed Out
Leesdale Passing Siding	6,000,000	1,730,356	4,269,644	December 2027
Operation Lifesaver Campaign	175,000	100,000	75,000	June 2025
Fiscal Year 2018 - 2020 Formula Sub-Total	\$ 13,854,547	\$ 7,887,406	\$ 5,967,141	

Fiscal Year 2018 - 2020 Competitive

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Integrated Wayfinding Signage Upgrade	\$ 718,750	\$ 265,917	\$ 452,833	December 2025
Fiscal Year 2018 - 2020 Competitive Sub-Total	\$ 718,750	\$ 265,917	\$ 452,833	

Fiscal Year 2018 - 2025 SRA Funding Total	\$ 14,573,297	\$ 8,153,323	\$ 6,419,974	
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Fiscal Year 2021 - 2025 Formula ⁽¹⁾

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Interregional Connectivity Improvement Project	\$ 550,000	\$ -	\$ 550,000	December 2025
LOSSAN Strategic Plan Update	400,000	373,621	26,379	Project Completed / Closed Out
Equipment Replacement / Matching Funds	7,586,120	-	7,586,120	December 2026
Corridor Hardening and Safety Improvements	5,880,000	2,106,583	3,773,417	December 2026
Santa Ynez River/Surf Bridge Replacement Project	12,965,142	-	12,965,142	December 2027
Fiscal Year 2021 - 2025 Formula Sub-Total	\$ 27,381,262	\$ 2,480,203	\$ 24,901,059	

SRA Funding Total	\$ 41,954,559	\$ 10,633,527	\$ 31,321,032	
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Notes:

(1) \$27.4 million received to date of expected \$29.8 million in round two funding. Remaining funds to be received over next 2 years for the Santa Ynez River/Surf Bridge Replacement Project.



Third Quarter Grant Reimbursement Status Report

Transit and Intercity Rail Capital Program (TIRCP)

January through March 2025

2024 TIRCP

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Orcutt Road Left-Hand Crossover	\$ 4,161,000	\$ -	\$ 4,161,000	June 2027
Ortega Siding	22,000,000	-	22,000,000	June 2029
2024 TIRCP Grant Sub-Total	\$ 26,161,000	\$ -	\$ 26,161,000	

2020 TIRCP

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Central Coast Layover Facility Expansion (Phase 1)	\$ 24,303,500	\$ 1,178,042	\$ 23,125,458	June 2029
San Diego County Maintenance and Layover Facility (Phase 1)	28,439,500	-	28,439,500	June 2029
2020 TIRCP Grant Sub-Total	\$ 52,743,000	\$ 1,178,042	\$ 51,564,958	

2018 TIRCP

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
UPRR Franchise Access Fee, Cap. Access and Incentive	\$ 32,894,000	\$ 8,140,000	\$ 24,754,000	June 2028
Ortega Siding	10,677,000	-	10,677,000	June 2028
Upgrade of Non-Powered Switches	5,090,000	5,090,000	-	Project Completed / Closed Out
Install Centralized Traffic Control (Goleta to San Luis Obispo)	16,296,000	16,296,000	-	Project Completed / Closed Out
Camarillo Station Improvements	2,145,000	-	2,145,000	December 2028
Goleta Layover Facility Improvements	12,162,000	180,000	11,982,000	March 2027
Corridor Hardening Improvements (Safety)	8,555,000	-	8,555,000	June 2026
Ventura County Rincon Point Slope Repairs	6,610,000	-	6,610,000	June 2026
Santa Barbara County Hollister Ranch Repairs and Drilled Piers	10,406,000	-	10,406,000	June 2026
Tie Replacement	8,900,000	8,900,000	-	Project Completed / Closed Out
Pre-1949 Rail Replacement	15,100,000	15,100,000	-	Project Completed / Closed Out
Canada Honda Creek Bridge Replacement	29,238,000	-	29,238,000	December 2025
Los Alamos Creek Bridge (Narlon) Replacement	6,386,000	6,386,000	-	Project Completed / Closed Out
Safety Improvement Funds	487,000	487,000	-	Project Completed / Closed Out
North San Diego County Fencing Project	1,300,000	1,300,000	-	Project Completed / Closed Out
Signal Respacing and Optimization Project	15,900,000	14,620,508	1,279,492	June 2025
On-Time Performance Incentive Program (NCTD)	22,962,000	15,429,049	7,532,951	September 2025
Network Integration Funds	250,000	-	250,000	December 2025
2018 TIRCP Grant Sub-Total	\$ 205,358,000	\$ 91,928,556	\$ 113,429,444	

2016 TIRCP

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Franchise Access Fee, Cap. Access and Incentive (UPRR)	\$ 8,140,000	\$ 8,140,000	\$ -	Project Completed / Pending Close-out
Upgrade of Non-Powered Switches	1,000,000	1,000,000	-	Project Completed / Closed Out
Install Centralized Traffic Control (Goleta to San Luis Obispo)	5,860,000	5,860,000	-	Project Completed / Closed Out
Timetable and Corridor-Wide Network Integration	1,000,000	1,000,000	-	Project Completed / Closed Out
SANDAG Projects ⁽²⁾	66,000,000	66,000,000	-	Project Completed / Closed Out
2016 TIRCP Grant Sub-Total	\$ 82,000,000	\$ 82,000,000	\$ -	
TIRCP Grants Total	\$ 366,262,000	\$ 175,106,598	\$ 191,155,402	

Notes:

(1) These projects are led by NCTD.

(2) SANDAG Projects include the Elvira to Morena Double Track project and the Carlsbad Poinsettia project.



Third Quarter Grant Reimbursement Status Report

Other Discretionary Grants

January through March 2025

Proposition 1B

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Central Coast Layover Facility Expansion (Phase 1)	\$ 3,400,000	\$ -	\$ 3,400,000	June 2029
Camarillo Station Improvements	4,745,000	278,000	4,467,000	December 2026
Canada Honda Creek Bridge Replacement	11,000,000	-	11,000,000	December 2025
Los Alamos Creek Bridge (Narlon) Replacement	15,526,000	15,526,000	-	Project Completed / Closed Out
Interim SLO Facility	300,000	300,000	-	Project Completed / Closed Out
Proposition 1B Grant Sub-Total	\$ 34,971,000	\$ 16,104,000	\$ 18,867,000	

State Transportation Improvement Program (STIP)

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Central Coast Layover Facility Expansion (Phase 1)	\$ 11,500,000	\$ 2,449,070	\$ 9,050,930	June 2029
Leesdale Passing Siding	20,000,000	-	20,000,000	June 2028
STIP Grant Sub-Total	\$ 31,500,000	\$ 2,449,070	\$ 29,050,930	

Solutions for Congested Corridors Program (SCCP)

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
Leesdale Passing Siding	\$ 43,500,000	\$ -	\$ 43,500,000	June 2028
SCCP Grant Sub-Total	\$ 43,500,000	\$ -	\$ 43,500,000	

Restoration & Enhancement (R&E) Grant Program

Project	Total Award	Total Reimbursed to Date	Remaining Balance	Anticipated Project Completion
LOSSAN Rail Corridor Service Enhancement Project	\$ 27,120,363	\$ -	\$ 27,120,363	June 2032
R&E Grant Program Grant Sub-Total	\$ 27,120,363	\$ -	\$ 27,120,363	
Discretionary Grants Total	\$ 137,091,363	\$ 18,553,070	\$ 118,538,293	



Third Quarter Grant Reimbursement Status Report

Grants Pending Close-out

January through March 2025

Project	Funding Source	Total Award	Total Reimbursed to Date	Remaining Balance
Franchise Access Fee, Cap. Access and Incentive (UPRR)	2016 TIRCP	\$ 8,140,000	\$ 8,140,000	\$ -
Grants Pending Close-out Sub-Total		\$ 8,140,000	\$ 8,140,000	\$ -



Third Quarter Grant Reimbursement Status Report

Grants Closed Out


January through March 2025

Project	Funding Source	Total Award	Total Reimbursed to Date	Remaining Balance
Upgrade of Non-Powered Switches	2018 TIRCP	\$ 5,090,000	\$ 5,090,000	\$ -
Install Centralized Traffic Control (Goleta to San Luis Obispo)	2018 TIRCP	16,296,000	16,296,000	-
Grants Closed Out Sub-Total		\$ 21,386,000	\$ 21,386,000	\$ -



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director 

Subject: Fiscal Year 2024-25 Third Quarter Los Angeles – San Diego – San Luis Obispo Rail Corridor Trends

Overview

A report on ridership, revenue, and on-time performance for passenger rail services on the Los Angeles – San Diego – San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, covering the third quarter of state fiscal year 2024-25.

Recommendation

Receive and file as an information item.

Background

The 351-mile Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor (Corridor) travels through a six-county coastal region in Southern California and is the busiest state-supported intercity passenger rail corridor in the United States. The LOSSAN rail corridor includes 41 stations and currently hosts 145 daily passenger trains. The Pacific Surfliner currently serves 29 stations and operates 22 daily one-way trains (eleven round trips). The eleventh-round trip between Los Angeles and San Diego was added in the end of March 2025. In fiscal year (FY) 2024 there were nearly 1.9 million passenger trips on Pacific Surfliner trips alone, and an additional 2.8 million passenger trips were taken on the two commuter rail services (Metrolink and COASTER) on the LOSSAN Corridor.

Discussion

The report provides an update on the performance trends of the passenger rail services operating on the LOSSAN Corridor, focusing on three specific performance areas: usage (ridership and passenger miles), efficiency (revenue and farebox recovery), and quality (on-time performance (OTP) and customer

satisfaction). The report includes the Pacific Surfliner intercity passenger rail service, as well as commuter rail service on Metrolink's Ventura County Line (VCL) and Orange County Line (OCL), and the North County Transit District's (NCTD) COASTER system. Amtrak national data is included for comparative purposes. The reporting period is the third quarter of FY 2024-25, covering the months of January, February, and March 2025.

Usage

For the third quarter of FY 2024-25, total LOSSAN corridor **ridership for the three services combined was 1,169,477**, representing a 21.6 percent increase when compared to the same period of the previous year. A 24-month chart for the LOSSAN corridor, with the specific performance of each service, is shown in Figure 1.

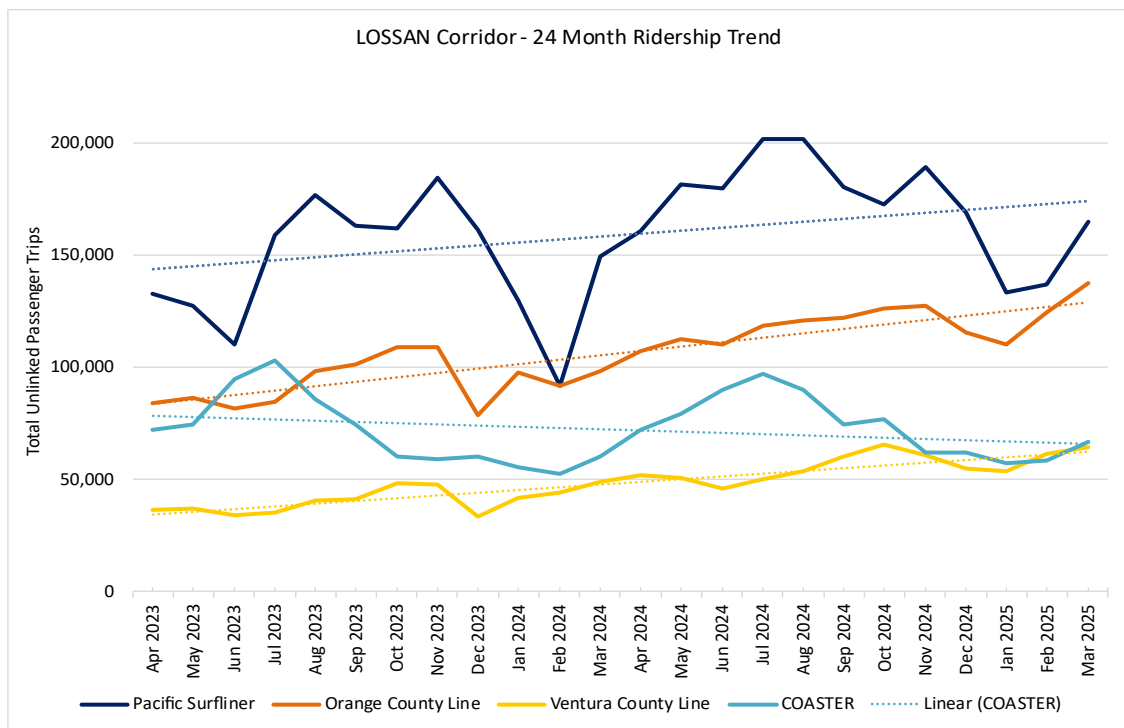


Figure 1

The 24 months of ridership data included in Figure 1 provide a more accurate indicator of the overall change in ridership along the corridor. Due to seasonal variances, a complete ridership trend is difficult to discern from a single 12-month period. Including 24 months of data accounts for seasonal variations in ridership patterns and provides sufficient information to develop a linear trendline for each service. A summary table of the ridership, revenue, and OTP for the LOSSAN corridor can be found in Attachment A. In addition to this overall corridor data, details on the performance of each service are provided below.

Pacific Surfliner

Overall LOSSAN corridor ridership includes ridership on the Pacific Surfliner intercity passenger rail service, which operates between San Diego and San Luis Obispo. Pacific Surfliner ridership during the third quarter of FY 2024-25 was 434,953, representing an increase of 17.4 percent when compared to the same period last year, as is illustrated in Figure 2.

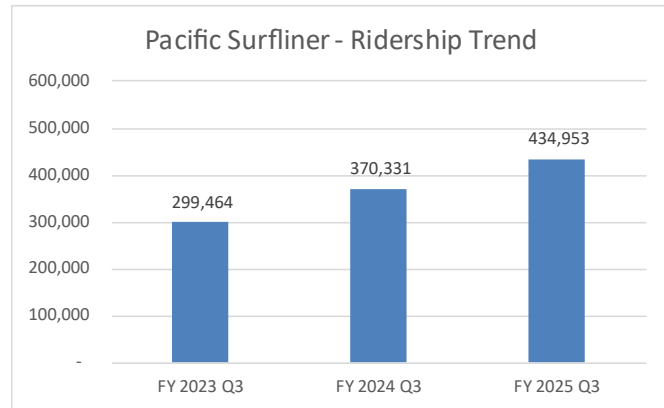


Figure 2

The increase in ridership during the third quarter of FY 2024-25 can be attributed to growing ridership and the absence of emergency-related service disruptions in San Clemente. Unlike the prior two fiscal years, which experienced unplanned emergency closures, this quarter only included scheduled track closures that were limited in duration and scope, resulting in less overall service impact.

Metrolink

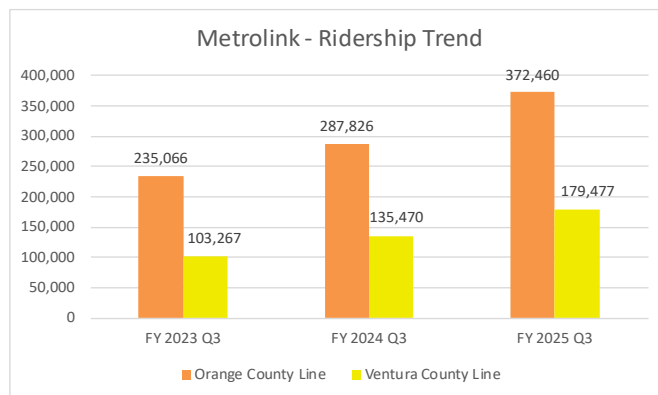


Figure 3

The VCL, which operates between East Ventura and Los Angeles, saw a ridership increase of 32.5 percent when compared to the third quarter of last year. The OCL, which operates between Los Angeles and Oceanside, saw a 29.4 percent increase in ridership over the same report period in the prior year. During the third quarter of FY 2024-25,

there were an average of 10,807 Metrolink pass holders per month who utilized the Rail 2 Rail (R2R) Program to ride Pacific Surfliner trains¹.

¹ Metrolink R2R values are based on preliminary, unaudited data provided by Amtrak.

COASTER

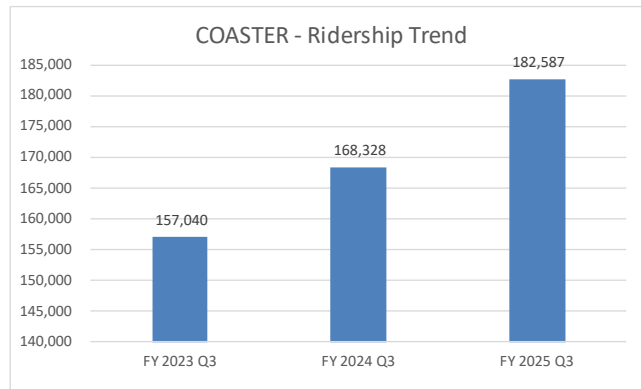


Figure 4

NCTD's COASTER commuter rail service operating between Oceanside and San Diego experienced a sizable increase in ridership during the third quarter of FY 2024-25 when compared to the same period in the prior year, as shown in Figure 4. During the third quarter of FY 2024-25, there were an average of 427 COASTER pass holders per month utilizing the R2R

Program to ride Pacific Surfliner trains².

Amtrak System

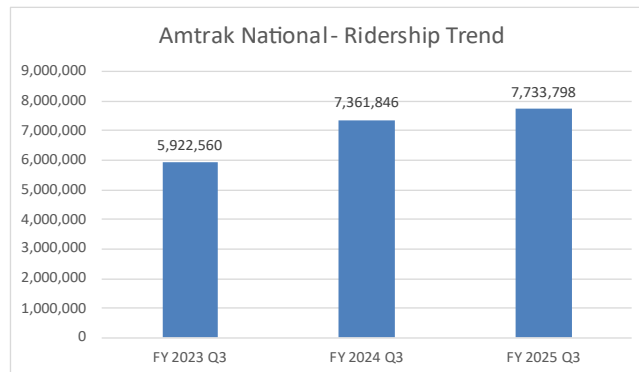


Figure 5

Amtrak service nationwide experienced a cumulative ridership increase of 5.1 percent for the third quarter of FY 2024-25 when compared to the same period in the prior year, as illustrated in Figure 5.

Amtrak's Coast Starlight, which operates between Seattle and Los Angeles, saw ridership increase by 16.3 percent in the

third quarter compared with the same period last year. The Capitol Corridor (operating between Auburn, Sacramento, Oakland, and San Jose) and the San Joaquins Corridor (operating from both Oakland and Sacramento to Stockton and Bakersfield) are the two other California state-supported intercity passenger rail services operated by Amtrak and provide a comparison to the Pacific Surfliner service despite serving significantly different markets. Ridership increased by 1.9 percent on the Capitol Corridor and decreased by 1.3 percent on the San Joaquins Corridor during the third quarter when compared to the same period last year.

² COASTER R2R values are based on preliminary, unaudited data provided by Amtrak.

Passenger Miles

A passenger mile is defined as one passenger traveling one mile. For example, ten passengers who each travel 100 miles would generate 1,000 passenger miles. This metric depicts the growth in passenger usage and distance traveled.

The Pacific Surfliner generated over 42 million passenger miles during the third quarter of FY 2024-25, which is a 40.5 percent increase compared to the same period in the prior year. This increase in passenger miles is largely due to improved service continuity compared to the prior year, which was affected by emergency track closures that reduced overall train operations. Factoring in the average pounds of carbon dioxide emissions generated per passenger mile traveling in a private automobile versus on passenger rail, a reduction of about 15,290 tons of greenhouse gases was achieved, which is equivalent to avoiding burning approximately 1,560,802 gallons of gasoline.

Efficiency

Passenger Trips Per Train Mile

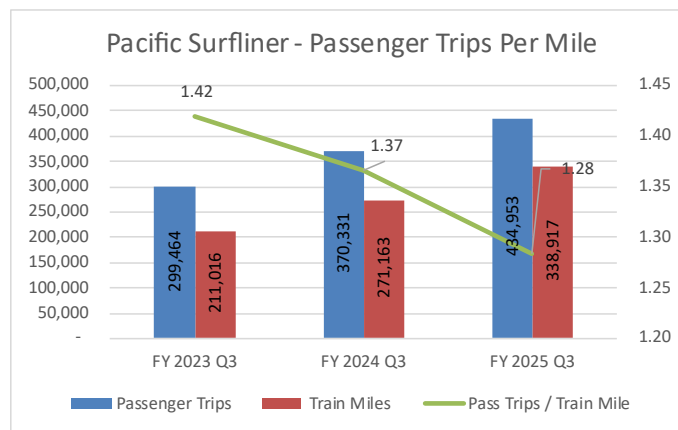


Figure 6

Passenger trips per train mile is calculated by dividing total passenger trips (ridership) by the total miles traveled by all Pacific Surfliner trains operated in revenue service³.

This metric focuses on service efficiency, as it is the ratio of usage (passenger trips) over service provided (train miles). The higher the ratio value, the more efficient

the service, and vice versa. For the third quarter of FY 2024-25, the ratio of passenger trips per train mile decreased by 6 percent when compared with the same period in the prior year, as illustrated in Figure 6.

³ Total train miles include deadhead mileage to and from rail yard facilities.

Revenue

In line with the increase in Pacific Surfliner ridership, driven primarily by growing demand and increased operation, total revenue also increased. For the third quarter of FY 2024-25, total revenue increased by 27.7 percent when compared with the same period in the prior year, as shown in Figure 7.

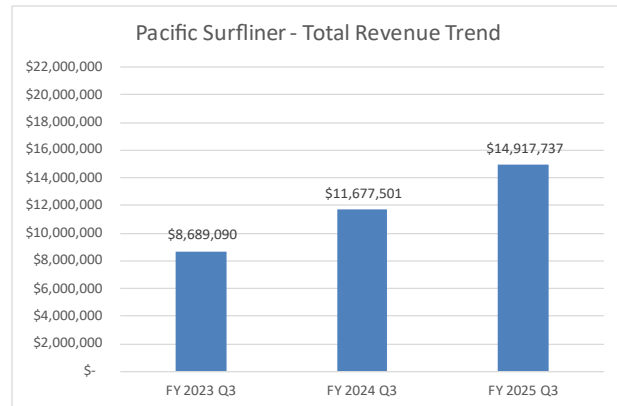


Figure 7

Farebox Recovery

The Pacific Surfliner farebox recovery ratio is calculated as total revenue divided by total operating expenses as defined in the Intercity Passenger Rail Act of 2012 Establishment of Uniform Performance Standards by the California State Transportation Agency. As a performance measure, farebox recovery is normally reported on an annual basis, versus a shorter period. This is because expenses are not linear throughout the year, which can result in significant fluctuations in the farebox recovery ratio from month to month and even quarter to quarter. The Pacific Surfliner is legislatively required to achieve a minimum annual farebox recovery of 50 percent. The Pacific Surfliner farebox recovery ratio for the 12-month period ending March 31, 2025, was 60.80 percent. For comparison, including only the three months of the third quarter of FY 2024-25 results in a farebox recovery ratio of 51.5 percent.

Quality

On-Time Performance (OTP)

The methodologies for calculating OTP vary significantly between intercity and commuter rail services. A commuter train is considered late if it arrives six or more minutes late to its terminal location, while a Pacific Surfliner train is considered late if it arrives more than 15 minutes after its scheduled arrival time. For the Pacific Surfliner service, endpoint OTP is calculated by dividing the total number of trains arriving on time at the end point by the total number of trains operated. The State of California intercity passenger rail Uniform Performance Standards (UPS), which were approved by the Secretary of Transportation in 2014, set an endpoint OTP goal of 90 percent for the Pacific Surfliner service.

For the three months in the third quarter of FY 2024-25, endpoint OTP for the Pacific Surfliner averaged 83.1 percent, which was a 0.4 percent increase over

the same period in the prior year. Figure 8 illustrates a monthly OTP trend for the Pacific Surfliner.

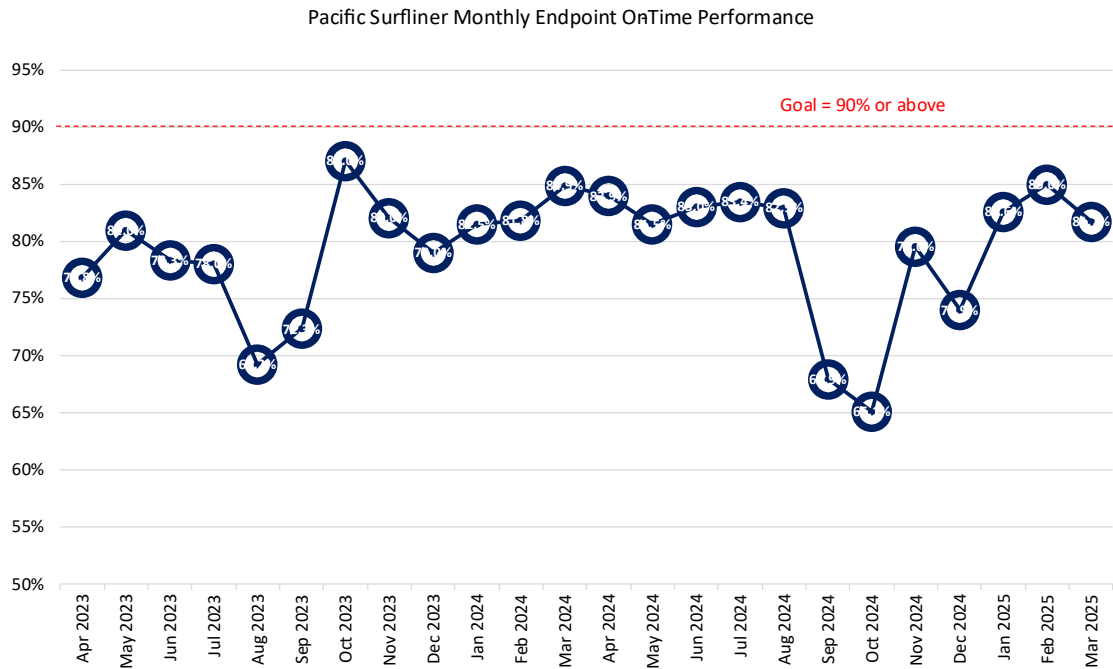


Figure 8

The increase in OTP from the prior quarter is primarily due to the resolution of several challenges that negatively impacted service reliability last quarter. In September and October 2024, dispatching-related delays occurred on the BNSF Railway between Los Angeles and Fullerton following BNSF’s relocation of its Southern California dispatching functions from San Bernardino to Fort Worth, Texas. The transition led to disruptions as newly assigned dispatchers were unfamiliar with the territory. Since then, BNSF has assigned a senior manager to oversee dispatching operations in the region, which has contributed to improved on-time performance.

Customer Satisfaction

Amtrak reports a monthly Electronic Customer Satisfaction Index (eCSI) score for all routes, in which a “very satisfied” percentage is calculated per 100 passengers via electronic surveys. For the third quarter of FY 2024-25, the Pacific Surfliner scored an average eCSI of 84.2 percent, representing a 3.6 percent increase from the average eCSI of 81.3 percent achieved during the same period last year.

Additional Performance Indicators

Food and Beverage Sales

The LOSSAN Agency's focus on improving service quality and the customer experience has prompted additional attention to the food and beverage selections offered in the Pacific Surfliner Café Car. Continual effort is made to ensure that menu items are meeting passenger expectations. As part of that effort, LOSSAN Agency staff closely monitor food and beverage sales to gauge the success of what is being offered and identify items that need to be adjusted.

<i>Sales Category</i>	<i>FY 2024 Q3</i> <i>(Jan-Mar 2024)</i>	<i>FY 2025 Q3</i> <i>(Jan-Mar 2025)</i>	<i>% Change</i>
Baked Goods	\$ 37,493	\$ 54,427	45.2%
Beer	\$ 97,007	\$ 148,243	52.8%
Beverages	\$ 164,677	\$ 190,260	15.5%
Dairy Products	\$ 857	\$ 1,214	41.7%
Fresh Prepared Foods	\$ 105,795	\$ 142,403	34.6%
Liquor	\$ 61,231	\$ 84,242	37.6%
Miscellaneous Merchandise	\$ 259	\$ -	-100.0%
Packaged Snack Foods	\$ 224,266	\$ 280,385	25.0%
Wine	\$ 177,186	\$ 181,758	2.6%

For the third quarter of FY 2024-25, food and beverage sales increased by 24.7 percent compared to the same quarter in the prior year. This growth can be attributed to higher ridership and the absence of major service disruptions in San Clemente, which had impacted operations during the previous two fiscal years.

Total Revenue	\$ 868,769	\$ 1,082,930	24.7%
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Figure 9

Amtrak Thruway Bus Service

Pacific Surfliner rail service is supplemented by Amtrak's network of Thruway buses that connect passengers throughout the LOSSAN corridor. The bus routes function as part of the Pacific Surfliner service and as of March 31, 2025, included:

- Route 17: Three daily round trips between Santa Barbara, San Luis Obispo, and Oakland (where it connects with Capitol Corridor); and one daily round trip between San Luis Obispo and Oakland.
- Route 39: One daily round trip between Fullerton and Indio/Coachella Valley, and one daily round trip between Fullerton and Palm Springs.

For the third quarter of FY 2024-25, combined ridership on these two routes totaled 21,404, representing a marginal increase when compared to the ridership of 20,336 for the same period in the prior year.

Summary

This report provides an update of trends for the usage, efficiency, and quality of the passenger rail services on the Los Angeles – San Diego – San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, for the third quarter of FY 2024-25. During the third quarter, total combined passenger rail ridership along the corridor increased by 21.6 percent when compared to the same period last year. Notably, ridership on the Pacific Surfliner alone increased by 17.4 percent, accompanied by a 27.7 percent increase in total revenue relative to the same period in the previous year.

Attachment

- A. Los Angeles – San Diego – San Luis Obispo Rail Corridor Performance Summary, Third Quarter Fiscal Year 2024-25

Prepared by:



Kristopher Ryan
Chief Financial Officer
(714) 560-5409

**Los Angeles – San Diego – San Luis Obispo Rail Corridor Performance Summary
Third Quarter Fiscal Year 2024-25**


<u>Service</u>	<u>Ridership (total)</u>	<u>Ridership – Growth Over Same Quarter Previous Year</u>	<u>Revenue (total)</u>	<u>Revenue – Growth Over Same Quarter Previous Year</u>	<u>Endpoint OTP (3 mo. avg.)</u>
Pacific Surfliner	434,953	17.4%	\$14,917,737	27.7%	83.1%
Metrolink Orange County Line	372,460	29.4%	---	---	79.2%
Metrolink Ventura County Line	179,477	32.5%	---	---	87.6%
COASTER	182,587	8.5%	---	---	95.9%
LOSSAN Total	1,169,477	21.6%	---	---	---

Amtrak Nationwide	7,733,798	5.1%	---	---	76.0%
Coast Starlight	86,542	16.3%	---	---	67.4%
Capitol Corridor	249,256	1.9%	---	---	88.6%
San Joaquins	206,591	-1.3%	---	---	76.6%



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewel, Managing Director 

Subject: Fiscal Year 2024-25 Third Quarter Amtrak Pacific Surfliner System Safety and Incident Report

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency operating agreement with Amtrak includes police services to provide a safe, secure, and reliable service to Pacific Surfliner crews and passengers. These police services have a considerable effect on repeat ridership, based on the customer travel experience. This report presents a summary on system safety and incidents for Amtrak Pacific Surfliner service during the third quarter of fiscal year 2024-25, covering the months of January, February, and March 2025.

Recommendation

Receive and file as an information item.

Background

The Amtrak Pacific Surfliner route operates in a complex environment, along the 351-mile Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor, which traverses through a six-county coastal region in Southern California. The Amtrak Police Department (APD) provides law enforcement officers along the entire corridor to ensure the safety and security of Pacific Surfliner employees, passengers, and infrastructure. These officers are based out of three substations, San Diego Santa Fe Depot, Los Angeles Union Station, and the Santa Barbara Amtrak station.

Discussion

This report presents system safety and incident information, covering trespasser strikes by Pacific Surfliner trains, reported crimes on Pacific Surfliner trains and or at stations, response, and mitigation measures to these crimes for the third quarter of fiscal year (FY) 2024-25.

Reported Crimes

Trespass of Real Property – Non collision

There were **two** incidents reported of trespassers on railroad tracks that did not involve a collision.

Both incidents involved train 769. The first occurred when train entered “Emergency Braking” near the City of Oxnard, at milepost (MP) 404.64 of the Union Pacific Railroad (UPRR) Santa Barbara Subdivision, when a trespasser was observed on the tracks. As the train braked and decreased in speed, the trespasser was seen running from the tracks and away from the area. This incident caused a 7-minute delay.

The second incident occurred the train entered “Emergency Braking” after an unknown type of vehicle was seen passing under the downed activated gates at a crossing in the City of Encinitas, along the North County Transit District (NCTD) San Diego Subdivision. The train was able to stop short of striking the vehicle, as the vehicle backed off the tracks and fled the location. This incident caused a 15-minute delay.

Trespass of Real Property – Collisions

There were **two** reported trespasser strikes involving Pacific Surfliner trains, both of which proved to be fatal.

The first incident involved train 774 near MP 378.5, one mile south of Carpinteria Station, on the UPRR Santa Barbara Subdivision. In this incident, a female trespasser was observed walking in the gauge with her back towards the train. Despite efforts to stop and alert the trespasser using the horn, the trespasser made no attempt to avoid the collision and was struck. As a result of this incident, due to extensive delays, trains 572 and 587 were canceled, and several additional train schedules were adjusted.

The second incident occurred with train 785 near MP 372.56 of the UPRR Santa Barbara Subdivision where the train struck a trespasser laying across the tracks, despite attempts by the engineer to stop the train in time.

Larceny/Theft

There was a total of **seven** reported thefts of property during this quarter.

Two of these incidents occurred onboard train 777. The first occurred when a passenger moved his backpack from the luggage rack to the overhead storage and noticed items missing from within the bag. The second occurred after a

passenger placed their luggage in the luggage rack, only to discover it missing upon their arrival at Los Angeles Union Station.

Another occurred on a platform when a passenger was awaiting the arrival of their train at Burbank Airport. At the time of the incident, the passenger was not aware of the theft until they boarded the train and noticed their luggage was missing.

There were also two thefts of cellular devices that occurred onboard trains. The first occurred onboard train 580, when a passenger left their phone charging, only to notice it missing upon arrival at their destination. The second occurred when a passenger traveling onboard train 572 awoke after a nap and discovered the cellular device they had placed in their shirt pocket was missing.

Another involved the theft of a jacket onboard train 784, when a passenger placed their jacket in the overhead storage rack and walked to another car to retrieve additional property. After returning, they noticed the jacket had been removed from the overhead storage rack.

Lastly, a passenger reported the theft/loss of a wallet while onboard train 573. The passenger believed they may have misplaced the wallet, but during their search, subsequently found it in a trash can within the car. After examining the contents of the wallet, the passenger realized all U.S. currency within the wallet had been stolen. The passenger then reported the theft.

Assaults

There were **nine** assaults reported during this quarter related to Surfliner Train operation.

Two of the assaults occurred at the San Diego Santa Fe Depot. The first assault occurred on board train 581 when a potential fare evader was stopped by the conductor while attempting to board the train. The suspect became angry, and aggressively forced their way passed the conductor, purposefully striking the conductor with her shoulder.

The second assault which occurred at the San Diego Santa Fe Depot took place when the conductor of train 591 informed an un-ticketed passenger that they were not allowed to board the train. In receiving the information, the fare evader became angry, shoved, and struck the conductor, as they attempted to board. During the altercation, the conductor was able to physically escort/remove the suspect from the of the train, at which time they fled the location on foot.

Another assault occurred in the City of Oceanside, when a potential fare evader attempted to board train 586, but was stopped by the conductor. At that time the suspect became angry, and as the door to the train was closed to prevent their

boarding, the suspect spat on the conductor's face. The suspect then fled the location.

There were also two assaults that occurred on board train 774. The first of which occurred at Los Angeles Union Station, when the conductor of train 774 contacted a person who boarded and locked his bicycle onboard the train without the proper ticket. In questioning the person, the person grabbed the conductor by the shoulders and threw him to the ground before walking from the train. The suspect was contacted by APD and arrested at the location.

The second assault on board train 774 occurred when a passenger, for unknown reason, struck another in the face. The victim immediately notified the conductor. In response, the train was held at Solano Beach while the conductor requested local law enforcement. Both parties were contacted at the location, and the suspect was arrested.

Another assault occurred on board train 777 near the Northridge station. For this incident, the passenger did not have a valid ticket. After the conductor advised them that they were on the wrong train, the conductor turned around to help other passengers, at which time the suspect spat on the back of the conductor's head and shoulder. After the train arrived at Northridge station, the suspect fled the train and area on foot.

There was also an assault on train 784, when a passenger, who was boarding with a suitcase, was purposely pushed from behind by another passenger, causing them to fall to the floor. The passenger sustained minor injuries.

The last reported assault occurred onboard train 790, when a female passenger was approached by a male passenger who placed his hand on her leg and leaned towards her in an attempt to kiss her. The victim yelled at the suspect, after which the suspect ceased their actions.

Disorderly Conduct

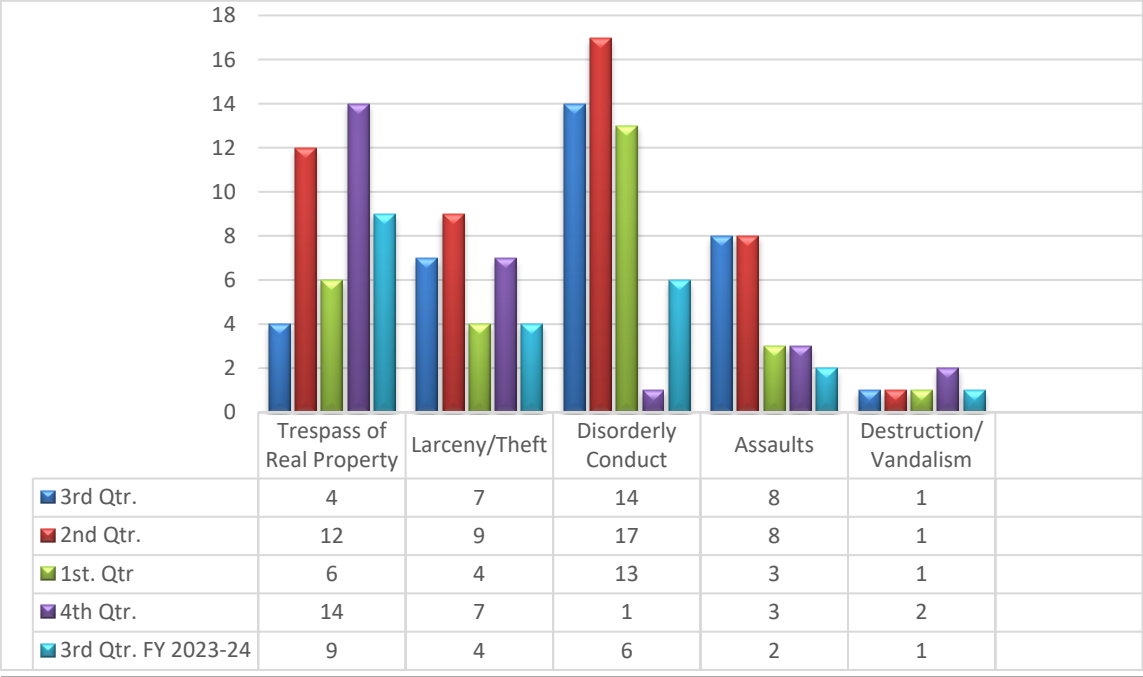
There were 14 reports of disorderly conduct across eleven trains during this reporting period. Of these trains, trains 761, 769 and 794 had two reported incidents each, most of which dealt with potential fare-evaders attempting to board.

The remaining eight trains each reported one incident, with intoxication being the leading cause for the disturbance, followed by loud and or threatening behavior. These incidents were reported by the conductors, with some leading to arrest or removal from the train.

Vandalism

There was one incident of vandalism reported during this quarter, which occurred near the City of San Clemente to train 581. In this instance, three juveniles were seen throwing rocks at the train as it passed by, striking a window, causing it to shatter.

Figure 1: Fiscal Year 2024-2025 Quarterly Reported Crimes



Response and Mitigation Measures

During the third quarter of FY 2024-2025, officers increased their presence onboard targeted train routes, focusing on fare evaders and disorderly conduct passengers.

For the upcoming quarter, based on recent patterns, officers will increase their high visibility patrols on specific trains, in response to an elevated number of assaults on conductors.

Figure 2 below summarizes the total officer self-initiated services provided during this quarter, for officers assigned to the Santa Barbara, Los Angeles, and San Diego area. In total, there were 2,712 self-initiated patrols by officers, and 119 train rides.

Figure 2: Officer Self-Initiated Services

Row Labels	Number of Self-Initiated Patrols
PROPERTY	2,261
PROPERTY-FOUND	2
PROPERTY-LOST	4
PROPERTY-PROTECTION	1,913
PROPERTY-ROW CHECK	337
PROPERTY-ROW GATE CHECK	5
TACTICAL INTENSE PATROL	2,712
TIP-VIP TRAIN RIDE	4
TRAIN BOARDING, PLATFORM INSPECTION	2,589
TRAIN RIDE	119
Grand Total	4,973

Summary

In the third quarter of fiscal year 2024-2025, there was a notable decrease in trespasser strikes, when compared to the second quarter of FY 2024-2025. There was also a decrease in larcenies, when compared to the previous quarter.


As for assaults, there were a total of nine, six of which occurred to conductors, as they attempted to enforce the rules of carriage related to proper fare. It should be noted that there was a total of an additional fourteen fair evader reports during this quarter that did not lead to assaultive behavior.

For the upcoming quarter, officers will continue to conduct tactical intense patrols focused on those behaviors that lead the assaults or other crimes.

Attachment

None.

Prepared by:




James D. Campbell
Operations Officer
(714) 560-5390



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director 

Subject: Temporary Additional Santa Barbara Service

Overview

The Ventura County Transportation Commission and the Santa Barbara County Association of Governments have requested the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency to support a temporary service agreement that would allow the Southern California Regional Rail Authority/Metrolink to provide additional rail service between Ventura and Santa Barbara Counties. The additional service would utilize a rail timeslot previously secured by the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency through an agreement with Union Pacific Railroad Company and intended to be utilized for a future expansion of Amtrak Pacific Surfliner service.

Recommendation

- A. Authorize the Managing Director to negotiate the terms of an agreement or agreements to subcontract the implementation of additional temporary service in partnership with Metrolink and funded by Ventura County Transportation Commission and the Santa Barbara County Association of Governments, allowing for the temporary use of Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's timeslot while assuring anticipated future expansion of Pacific Surfliner to north of Los Angeles to Santa Barbara, Goleta and San Luis Obispo.
- B. Direct the Managing Director to bring back the agreement(s) necessary for Board approval.

Background

In 2022, Ventura County Transportation Commission (VCTC) and the Santa Barbara County Association of Governments (SBCAG) requested the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) to restore peak northbound early-morning service to Santa Barbara and Goleta. The Pacific

Surfliner previously operated an early-morning train from Los Angeles Union Station to Santa Barbara. However, the route, which started in 2018, suffered from reliability issues and overall low demand. It was eliminated as part of COVID-related service reductions.

In collaboration with SBCAG and VCTC, the LOSSAN Agency has explored various options to restore peak-morning Pacific Surfliner service to Ventura, Santa Barbara and Goleta. However, equipment availability and funding have prevented the implementation of the expanded service. The LOSSAN Agency's fiscal year (FY) 2024-25 Annual Business Plan does not include funding for this service and the current fleet capacity is not sufficient to support the expanded service levels.

The LOSSAN Agency's FY2025-26 Annual Business Plan, which was approved by the LOSSAN Agency Board of Directors (Board) and submitted to the State of California for review and approval on April 1, 2025, includes planning for additional roundtrips serving the Ventura and Santa Barbara County stations and traveling further north to San Luis Obispo in FY 2026-27. The planned expansion of Pacific Surfliner service in FY 2026-27 would bring the total to 14 roundtrips between San Diego and Los Angeles, six roundtrips between San Diego and Goleta, and three corridor-wide roundtrips between San Diego and San Luis Obispo, subject to available funding and fleet capacity.

As part of this plan, the 13th roundtrip between San Diego and Los Angeles is planned for implementation in FY 2025-26, also subject to equipment availability. To respond to the interest in restoring peak-morning service to Ventura, Santa Barbara, and Goleta, staff has drafted preliminary schedules to implement the 13th roundtrip between San Diego and Los Angeles, the 6th roundtrip to Goleta and the 3rd roundtrip to San Luis Obispo—by FY 2026-27 or sooner, when equipment and funding become available.

The rail access necessary to support this planned service expansion was secured through a Board-approved Passenger Rail Cooperative Agreement (PRCA) executed between the LOSSAN Agency and Union Pacific Railroad (UPRR), which owns and operates the Santa Barbara Subdivision of the LOSSAN Rail Corridor. The PRCA, which was executed in December 2022, established terms for increased Pacific Surfliner train service, including provisions for operations and maintenance reimbursements and performance-based incentive payments.

In return for increased track access, the LOSSAN Agency agreed to pay UPRR track access fees and on-time performance incentives as well as fund infrastructure improvements to support the expanded service. To date, the LOSSAN Agency has made approximately \$74 million capital investments in the Santa Barbara Subdivision. These infrastructure projects, which were funded

through State grants, include centralized traffic control, powered sidings, bridge replacements and new rails and ties. Future use of the rail timeslots negotiated as part of the agreement requires payment of the track access fees and on-time performance incentives to UPRR by LOSSAN.

Discussion

Because VCTC and SBCAG desire to initiate peak-morning service sooner than anticipated in LOSSAN's Annual Business Plan, the agencies engaged the Southern California Regional Rail Authority (SCRRA or Metrolink) to explore the possibility of Metrolink utilizing the additional rail access secured by LOSSAN through the PRCA to provide one additional roundtrip between Moorpark and Goleta stations. In late 2024, the Commission and Boards of VCTC, SBCAG and SCRRA, respectively, approved an agreement for SCRRA to begin the process of preparing an *Initial Service Start-up Plan* for the proposed service, including development of an operating agreement with LOSSAN. Since that time, the four agencies - Metrolink, VCTC, SBCAG and LOSSAN - have engaged in regular discussions to coordinate and plan the proposed Metrolink service.

The framework for an agreement to enable LOSSAN to subcontract with Metrolink to temporarily utilize LOSSAN's train access to implement the proposed roundtrip between Moorpark and Goleta is contemplated as a subcontract agreement between LOSSAN and Metrolink and a separate funding agreement(s) with VCTC and SBCAG to provide the required funding to LOSSAN. Under this arrangement, Metrolink would temporarily operate the service, and the operating costs would be provided to LOSSAN by VCTC and SBCAG. The agreements would include reimbursement to LOSSAN for track fees, on-time performance incentives and administrative costs. In addition, use of the timeslot would implicitly need to be temporary and time-limited to ensure it does not impact LOSSAN's ability to implement planned service expansions. Under no circumstances would the timeslot change hands from LOSSAN to SCRRA. Under this framework, additional details such as ticketing, fare structure, marketing and promotions would need to be coordinated and agreed upon among the agencies.

Summary

Staff recommends the Board of Directors authorize the Managing Director to negotiate the terms of an agreement or agreements to subcontract the implementation of additional temporary service in partnership with Metrolink and funded by Ventura County Transportation Commission and the Santa Barbara County Association of Governments, allowing for the temporary use of the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's timeslot while assuring anticipated future expansion of Pacific Surfliner to north of Los Angeles to Santa Barbara, Goleta and San Luis Obispo. Staff will bring back the agreement(s) for Board of Directors' approval.

Attachment

None.

Prepared by:



Chris Orlando
Deputy Managing Director
714-560-5020



June 16, 2025

To: Members of the Board of Directors

From: Jason Jewell, Managing Director

Subject: Reinstatement of Checked Baggage Service

Overview

In November 2023, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Board of Directors approved the Proposed Net Cost-Reduction Plan submitted by staff, which outlined a series of strategies aimed at reducing net operating costs while maintaining essential passenger services. A key component of the plan was the development of a revised station staffing model in collaboration with Amtrak, along with an evaluation of cost-effective opportunities to reopen select stations and restore checked baggage service.

With the revised station staffing model now implemented, and the successful reopening of Anaheim and Oceanside stations on March 10, 2025, staff recommends reinstating checked baggage service on the Pacific Surfliner. A financial model has also been developed to support cost recovery through a per-bag fee structure.

In addition, staff recommends updating the Pacific Surfliner baggage policy to align more closely with Amtrak's national baggage policy while ensuring consistency and operational efficiency.

Recommendations

- A. Coordinate with Amtrak to reinstate checked baggage service on the Pacific Surfliner.
- B. Implement a baggage fee of \$10 per checked bag to offset associated service costs.
- C. Approve updates to the Pacific Surfliner baggage policy.

Background

In response to the State's projected structural deficit for intercity passenger rail funding—exacerbated by ongoing emergency track closures and a slow post-pandemic recovery in ridership—the LOSSAN Rail Corridor Agency took immediate steps in late fiscal year (FY) 2022-23 to help mitigate cost overages and stabilize expenditures. Among these initial actions were the suspension of checked baggage service on June 12, 2023, and the closure of most staffed stations south of Los Angeles. While these were necessary short-term measures, staff understood that a longer-term solution would be needed to ensure sustainable service delivery while meeting California State Transportation Agency's (CalSTA) directive to reduce operating costs.

Recognizing the need for a more comprehensive plan, staff began working with Amtrak in mid-to-late 2023 to develop a coordinated strategy aimed at reducing net operating costs while maintaining core passenger services. These efforts led to the Proposed Net Cost-Reduction Plan, which was approved by the Board of Directors (Board) on November 20, 2023, and submitted to the CalSTA by the November 30 deadline.

A key component of the plan was to work collaboratively with Amtrak to develop a revised station staffing model that would keep several lower-ridership stations closed, optimize staffing levels at open locations, and identify a path forward for reopening select stations and reinstating checked baggage service.

Over the past several months, staff have built on these efforts by developing a staffing plan that optimizes staffing levels and hours at open stations while continuing to provide support for passengers during key train times. This revised staffing plan was implemented on March 10, 2025, and included the reopening of the Anaheim and Oceanside stations, both of which had been previously closed as part of the earlier cost-saving actions. The staffing plan maintains necessary service coverage in a more efficient and sustainable manner and serves as the operational foundation for the proposed reinstatement of checked baggage service.

The proposed reinstatement of checked baggage service builds on this progress, representing the next step in delivering on the objectives outlined in the Board-approved plan.

Discussion**Station Staffing Cost Savings**

As part of the cost-reduction strategy, staff worked with Amtrak to reassess station staffing levels across the corridor. This revised staffing plan focuses on maintaining coverage at essential locations while optimizing staffing hours to better align with

peak service times and passenger needs. The reopening of Anaheim and Oceanside stations was incorporated into this new staffing plan.

This effort is projected to result in approximately \$1.34 million in annual cost savings.

Baggage Service Costs and Revenue Model

To restore checked baggage service, staff evaluated the associated operating costs and developed a model to support full cost recovery through the implementation of a per-bag fee.

The total estimated annual cost to reinstate baggage service is approximately \$1.41 million. This includes dedicated baggage handlers at Los Angeles Union Station and ticket agents reassuming baggage duties at all staffed stations.

To offset these costs, staff developed a conservative financial model based on projected ridership for FY 2024-25. With an estimated annual ridership of approximately 2.15 million passengers, staff determined that charging a \$10 per bag fee would fully recover the annual baggage service costs if seven percent of passengers opt to check a bag. This corresponds to about 141,000 passengers annually opting to check one bag—equating to 141,000 total checked bags under the model.

Due to Amtrak's record retention policy and the absence of historical data on baggage usage, staff selected a \$10 per bag fee as a conservative break-even point. Usage will be monitored going forward to evaluate the fee's effectiveness and determine whether future adjustments are warranted.

Baggage Policy Update

As part of the proposed reinstatement of checked baggage service, staff are also recommending an update to the Pacific Surfliner baggage policy to align with Amtrak's national standards.

Currently, the Pacific Surfliner allows:

- 2 personal items
- 2 carry-on items
- 2 checked bags (currently suspended)

By comparison, Amtrak's national policy allows:

- 1 personal item
- 2 carry-on items
- Up to 4 checked bags (1-2 bags free; 3-4 bags at \$20 each)

Staff propose updating the Pacific Surfliner baggage policy to match Amtrak's baggage policy while implementing a flat-fee pricing model on all checked bags.

The proposed policy would allow:

- 1 personal item
- 2 carry-on items
- Up to 4 checked bags (\$10 per checked bag)

This approach supports consistency for passengers traveling between Pacific Surfliner and Amtrak long-distance services, while also supporting LOSSAN's goal of recovering the full cost of baggage service. This update would take effect in conjunction with the reinstatement of checked baggage service. Staff are coordinating with Amtrak on the implementation timeline, which is currently targeted for July 2025, and will ensure proper customer communications will take place through multiple channels.

Summary

The revised station staffing model has allowed the LOSSAN Rail Corridor Agency to reopen key stations such as Anaheim and Oceanside while maintaining cost efficiency. Reinstating checked baggage service builds on this progress by restoring a valued passenger amenity. The estimated annual cost of providing baggage service is approximately \$1.41 million. Staff have developed a conservative revenue model indicating that this cost can be recovered with a \$10 per bag fee, assuming seven percent of annual riders utilize the service. Staff also recommend updating the Pacific Surfliner baggage policy to align with Amtrak's baggage policy while applying a uniform fee model of \$10 per checked bag.

Staff recommend proceeding with reinstating checked baggage service and implementing the proposed baggage fee and baggage policy update, consistent with the goals of the Board-approved Net Cost-Reduction Plan.

Attachment

None.

Prepared by:



Kristopher Ryan
Chief Finance Officer



Reinstatement of Checked Baggage Service

LOSSAN Board of Directors Meeting | June 16, 2025



Background

- **Mid-Late FY23:** State budget deficit prompted immediate and long-term cost containment efforts
- **June 12, 2023:** Suspended checked baggage and closed most staffed stations south of LA
- **November 2023:** Board approved Net Cost-Reduction Plan
- **March 10, 2025:** New staffing model fully implemented; Anaheim and Oceanside reopened
- **June 2025:** Proposal to reinstatement baggage service and update baggage policy

Rationale for Reinstating Baggage Service



Restores a valued passenger amenity in a cost-neutral way by introducing a per-bag fee



Builds on the successfully implemented station staffing model, which optimized staffing and reopened Anaheim and Oceanside



Enhances the customer experience while supporting LOSSAN's broader service restoration efforts



Delivers on the objectives outlined in the Board-approved Net Cost-Reduction Plan



Helps leverage State's resources by reducing the net operating cost of the service



Allows Amtrak to better track checked baggage demand to inform future decisions

Proposal Overview

- **Reinstate checked baggage service** on the Pacific Surfliner
- **Implement a \$10 per bag fee** to fully offset service costs
- **Update baggage policy** to align with Amtrak's national standards
- **Provide a consistent and sustainable experience** for passengers

Proposed Baggage Service Locations

- Downtown San Diego
- Oceanside
- Anaheim
- Fullerton
- Los Angeles Union Station
- Van Nuys
- Oxnard
- Santa Barbara

Cost Recovery Model



Estimated annual cost to reinstate baggage service: \$1.41 million



FY25 projected annual ridership: 2.15 million passengers



A \$10 fee fully offsets costs if 7% of passengers check one bag



Equivalent to 141,000 bags/year or 385 bags/day



7% is the break-even point, not a demand projection



Actual usage is unknown — this is a conservative planning assumption



Usage data will be monitored; fee adjustments can be evaluated in the future

Evaluating Baggage Fee Scenarios

Fee per Bag	% of Riders Needed to Break Even	Risks/Considerations
\$5 per bag	14% (280,000 bags/year)	May not be achievable
\$10 per bag (proposed)	7% (141,000 bags/year)	Balanced + attainable target
\$20 per bag	3.5% (70,000 bags/year)	Could negatively impact usage / customer experience

Baggage Policy Update

Current Policy:

- 2 personal items
- 2 carry-on items
- 2 checked bags (suspended)

Amtrak National Policy:

- 1 personal item
- 2 carry-on items
- Up to 4 checked bags (1-2 free; 3-4 at \$20 each)

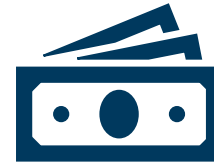
Proposed Policy:

- 1 personal item
- 2 carry-on items
- Up to 4 checked bags (\$10 per checked bag)

Board Action Requested



Approve reinstatement of
checked baggage
service



Approve \$10 per bag fee



Approve updated Pacific
Surfliner baggage policy



QUESTIONS?



Pacific Surfliner Marketing Update

Fiscal Year 2024-25 - Third Quarter

LOSSAN Board of Directors Meeting | June 16, 2025



Performance Summary

PacificSurfliner.com



Users to
PacificSurfliner.com



Referral traffic to
Amtrak.com



Bookings on
Amtrak.com



Riders

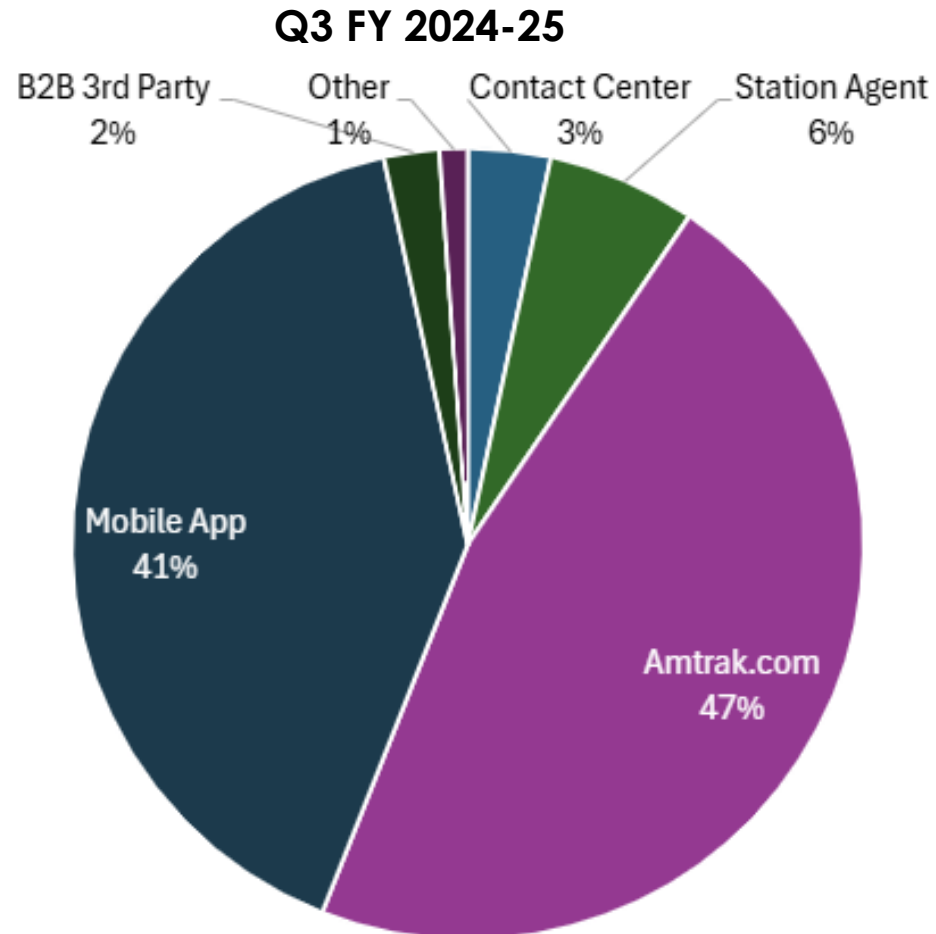


Revenue

	Users to PacificSurfliner.com	Referral traffic to Amtrak.com	Bookings on Amtrak.com	Riders	Revenue
Q3 – FY 25 (Jan-Mar)	543,500	130,000	10,964	22,762	\$798,658
Q2 – FY 25 (Oct-Dec)	420,000	163,382	16,044	32,077	\$1,069,841
Q1 – FY 25 (Jul-Sep)	631,000	274,402	26,734	61,186	\$1,905,473
Q4 – FY 24 (Apr-Jun)	612,000	236,292	21,547	47,109	\$1,512,473*

*Figure has been revised from previous quarterly update due to data reporting improvements from Amtrak implemented in September 2024.

Revenue by Sales Channel



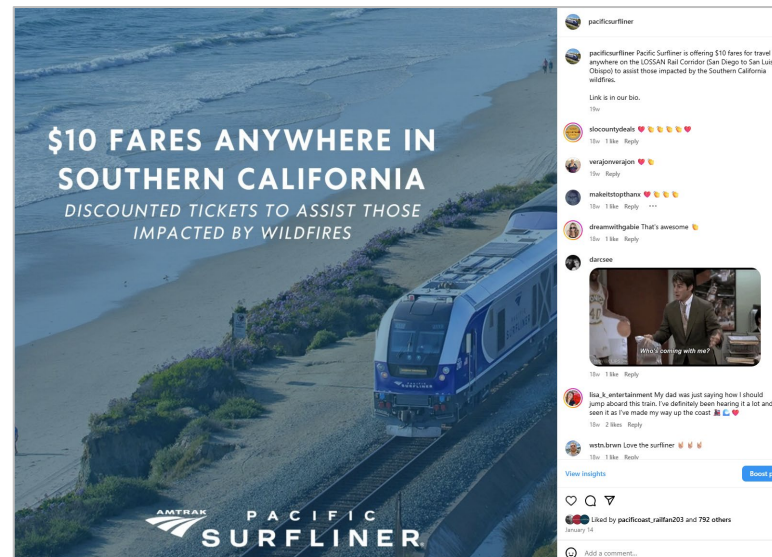
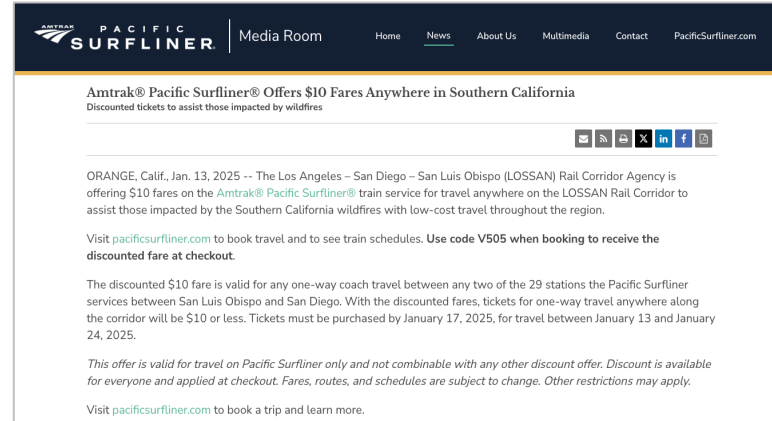
Total Revenue: \$17.17m


Q3 FY2024-25 Highlights: SoCal Wildfires Assistance

- \$10 special fare anywhere on Pacific Surfliner to support those affected by the SoCal wildfires
- Valid from January 17-24
- Emails, press release, and social media posts
- Ridership: 5,760*


*Preliminary, unaudited data from Amtrak

LOS||SAN





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\$10 Fares Anywhere in Southern California

Pacific Surfliner's special fares to assist those affected by the Southern California wildfires are available for purchase until January 17. One-way tickets are just \$10 for travel on Pacific Surfliner anywhere from San Diego to San Luis Obispo.

Tickets must be purchased by January 17, 2025 and are valid for travel until January 24, 2025. Use code V505 at checkout to book your discounted trip.

For more details, visit PacificSurfliner.com/Assist or click on the link below.


BOOK NOW


Q3 FY2024-25 Highlights: Spring Midweek Sale

- Spring sale to increase ridership during low ridership season
- 20% discount on midweek travel
- Valid from March 10 – April 30
- Pacific Surfliner emails
- Press release, digital ads
- Ridership: 4,585*
- Revenue: \$123,092.35*

*Preliminary, unaudited data from Amtrak



[Schedules](#)[Stations](#)[Offers](#)



Ride Midweek and Save 20% on Pacific Surfliner

Take in the beauty of the Southern California coast this spring! You'll save 20% when you travel Tuesday – Thursday from March 10 – April 30. Grab a window seat and enjoy breathtaking views of pristine beaches, rolling hills, and charming towns.


So sit back, relax, and enjoy the ride. Your wallet will thank you.


[BOOK NOW](#)

Q3 FY2024-25 Highlights: Expanded Service

- 11th roundtrip train added to schedule between LA and San Diego
- Combined with 20% discount on midweek travel
- Began March 31
- Pacific Surfliner and Amtrak Guest Rewards emails
- Digital ads



[Schedules](#)[Stations](#)[Offers](#)



Save 20% Midweek – Now More Trains Between L.A. & San Diego!

Starting today, March 31st, there are [more travel options between Los Angeles and San Diego!](#) A new southbound Train 566 will depart Los Angeles Union Station daily at 8:10am. A new northbound Train 579 will also depart Downtown San Diego daily at 1:01pm.

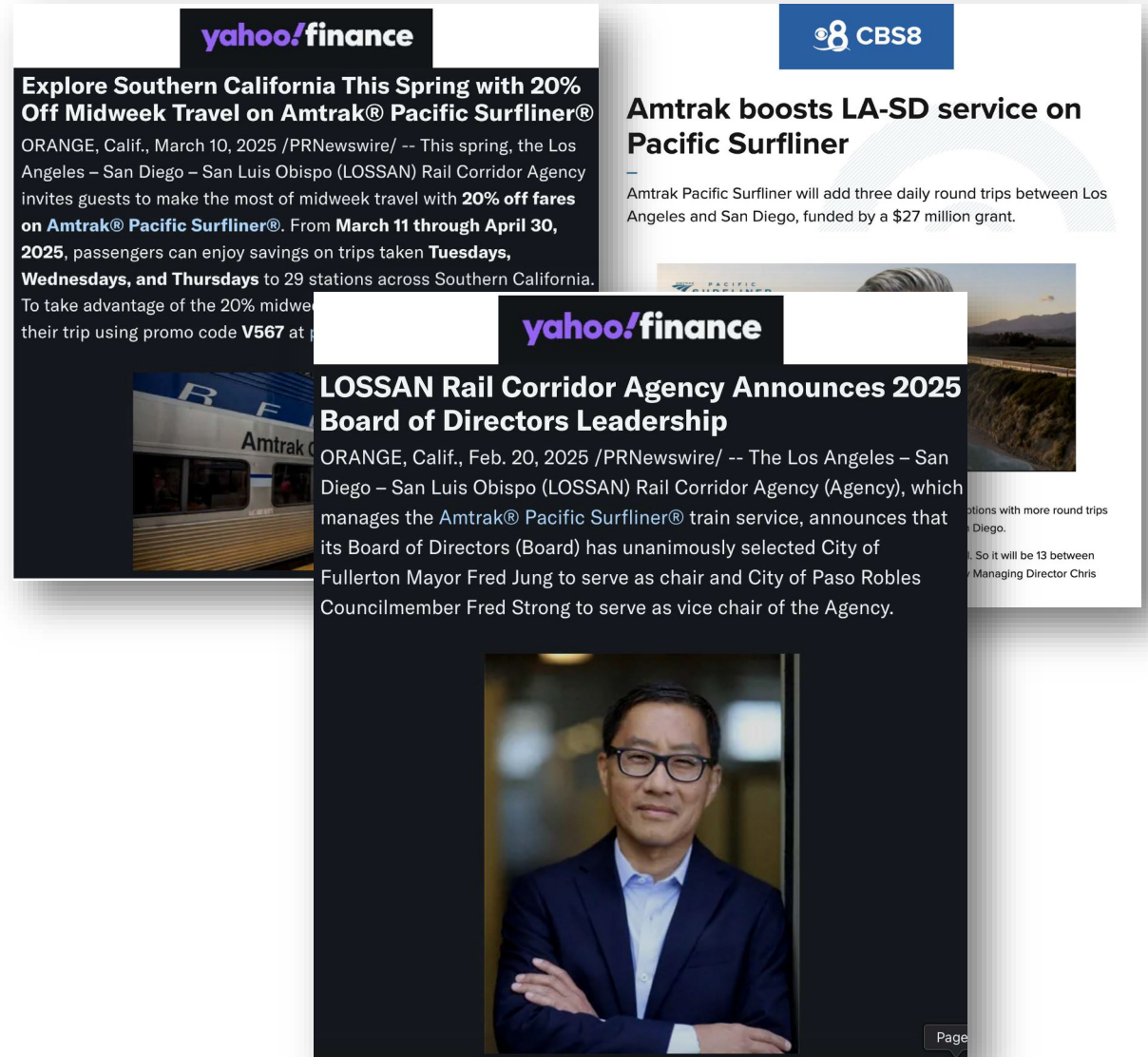
The best part? SAVINGS! Now through April 30th, enjoy [20% off midweek](#) fares when traveling on Tuesdays, Wednesdays, or Thursdays. Just use Promo Code V567 at checkout.

Discover all SoCal has to offer with Pacific Surfliner. 🌞

EXPLORE SOCAL

Q3 FY2024-25: Communications

- **In the Media:**
 - 1,370 media mentions
 - Impressions: 6 million
- **Publicity value:** \$1.14 million
- **Press Releases (4):**
 - **Jan 13, 2025:** LOSSAN Rail Corridor Agency Awarded \$27 Million to Increase Amtrak Pacific Surfliner Train Service
 - **Jan 13, 2025:** Amtrak Pacific Surfliner Offers \$10 Fares Anywhere in Southern California
 - **Feb 20, 2025:** LOSSAN Rail Corridor Agency Announces 2025 Board of Directors Leadership
 - **Mar 10, 2025:** Explore Southern California This Spring with 20% Off Midweek Travel on Amtrak Pacific Surfliner



Q3 FY2024-25: Social Media Influencer – Winter Campaign


- Seasonal influencer partnership campaign
- Theme: Daytrip Date from San Juan Capistrano to Old Town San Diego
- Influencers: Nadia & Jeremy Sry
- 15% discount shared through their social channels
- IG: 27.6K views, 872 likes, 41 comments, 419 shares, 313 saves
- TikTok: 4.3K views, 167 likes, 4 comments, 23 shares, 24 saves



Q3 FY2024-25: Social Media




10.8K Views

 pacificsurfliner Hello 2025! 🇺🇸
It's nice to see you: we're the Pacific Surfliner. Come ride with us in our bio.
📍: @coasterjosh
#amtrak
#amtrakpacificsurfliner
#pacificsurfliner
20w



15.2K Views

 pacificsurfliner We still can't get over it, either ✨
Thanks to @it.s.cristina for sharing your journey with us.
#amtrak
#traintravel
#pacificsurfliner
6w





896K Views

 entertainmentandstyle and 4 others
Maksym Rzeminski, Rzeminski Chamber Orchestra • Liz on Top of the ...
 entertainmentandstyle SoCal's Most Enchanting Tea Experience welcomes spring! NEW Spring Tea Alert at The Tea House on Los Rios
💖 Storybook feels at a charming hidden gem straight from Wonderland
You, me, and Tea? Yes, please! Share this reel with a friend and save it for later!





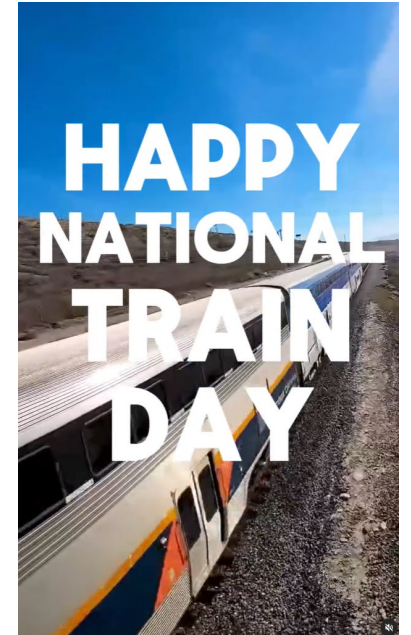
22.1K Views

 castrawberryfest and 2 others
Katrina Leskanich • Walking on Sunshine (2019 Rerecording)
 castrawberryfest Start your visit to the California Strawberry Festival on the right track! 🍓 Enjoy a relaxing hassle-free ride on @metrolink or @pacificsurfliner to the Ventura Train Station, then take a short walk across the street to the Festival entrance.
Plan your trip 📍 link in bio
#californiastrawberryfestival #californiastrawberryfest
4w




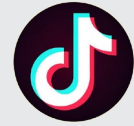


22.4K Views

 pacificsurfliner
Original audio
 pacificsurfliner It's our day today, baby! Happy #NationalTrainDay
#amtrak
#traintravel
#pacificsurfliner
2w



Q3 FY2024-25: Social Media Metrics

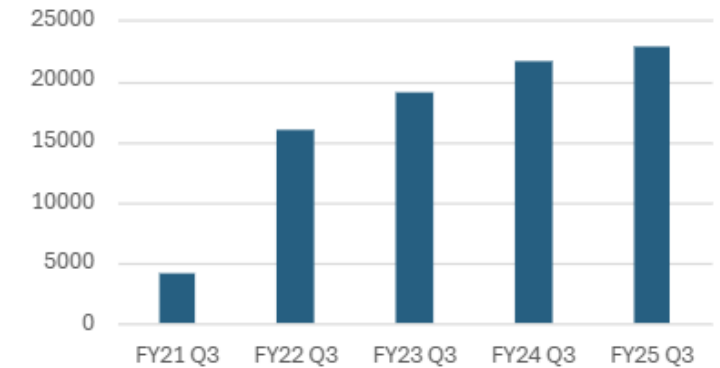
Platform	Total Followers	New Followers	Engagement Rate*	Link Clicks
	60,350	4,595	0.9%	1,110
	24,707	710	5.3%	N/A
	17,687	23	6%	301
	1,615	1	3.3%	N/A

*Engagement rate: Shares, comments/replies, likes, video views, etc., out of total followers.

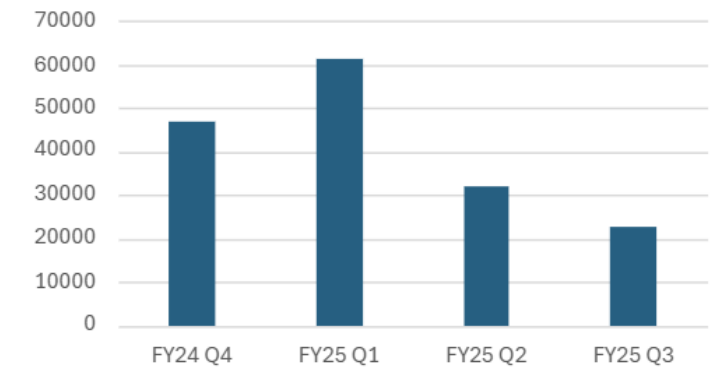
Q3 FY2024-25: Overall Performance (from online bookings)

January to March	Referral to Amtrak.com	Bookings	Ridership (from online Bookings)	Revenue (from online Bookings)
2020-21 – Q3	24,218	2,169	4,112	125,706
2021-22 – Q3	75,634	7,904	15,899	497,360
2022-23 – Q3	126,436	9,342	19,026	589,390
2023-24 –Q3	146,919	10,753	21,628	701,726
2024-25 –Q3	274,402	10,964	22,762	\$798,658

Q3 Ridership Year-over-Year




Past Year Ridership




Q3 FY2024-25: Pacific Surfliner Email Newsletter

Month	Total Average Recipients	Average Open Rate	Average Click Rate
Q3 FY2024-25	29,461	47.48%	2.56%




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IT'S OFFICIALLY TANDEM TIME 🚲

Grab your tandem bike and explore the SoCal coast on two wheels, together, using the Pacific Surfliner's brand new tandem bike racks! All you have to do is make a free reservation for your bike when you book your train trip. Click below to learn more.

PEDAL TO THE METAL




SchedulesDestinationsOffersTickets




CATCH FEELINGS, NOT TRAFFIC 💕

This Valentine's Day, let the Pacific Surfliner be your wingman. From beachside escapes to artsy adventures, we've got everything a couple of lovebirds need to thrive. Roll into romance with our blog on 5 incredible date ideas across SoCal!

RIDE THE LOVE TRAIN



SchedulesDestinationsOffersTickets



Spring break students

STUDENTS SAVE 15% 🍎

Are you a student? Consider riding the Pacific Surfliner to all your upcoming Spring Break adventures! Students 25 and under save 15% with code **V353** at checkout.

AN A+ DEAL

Q4 FY2024-25 Initiatives

- Spring Event Promotions
- Social Media Influencer Effort – Spring Campaign
- Emergency San Clemente Track Closure Reopening
- Service Restoration – 12th Roundtrip
- Strategic Partnerships
- Website Updates and Travel Companion
- Summer Event Promotions



QUESTIONS?