



BOARD OF DIRECTORS AGENDA

LOSSAN RAIL CORRIDOR AGENCY BOARD OF DIRECTORS MEETING

Wednesday, February 20, 2019
11:15 a.m. to 12:45 p.m.

Orange County Transportation Authority Headquarters
Board Room – Conference Room 07
550 South Main Street
Orange, California

Teleconference Sites:

County of Santa Barbara Administration Building
105 East Anapamu Street
Small Conference Room – 4th Floor
Santa Barbara, CA

Los Angeles County Metropolitan Transportation Authority
One Gateway Plaza
Office of the Board Secretary
Board Deputies' Conference Room – 3rd Floor
Los Angeles, CA

Paso Robles City Hall
1000 Spring Street
Mayor's Office – 2nd Floor
Paso Robles, CA

San Diego Metropolitan Transit System
1255 Imperial Avenue
Executive Committee Room – 10th Floor
San Diego, CA



BOARD OF DIRECTORS AGENDA

Any person with a disability who requires a modification, accommodation or agenda materials in an alternative format in order to participate in the meeting should contact the LOSSAN Clerk of the Board, telephone 714-560-5676, no less than two (2) business days prior to this meeting to enable LOSSAN to make reasonable arrangements to assure accessibility to this meeting.

Agenda Descriptions

The 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 Comments on Agenda Items

Members of the public may address the Board of Directors regarding any item. Please complete a speaker's card and submit it to the Clerk of the Board or notify the Clerk of the Board the item number on which you wish to speak. Speakers will be recognized by the Chairman at the time the agenda item is to be considered. A speaker's comments shall be limited to three (3) minutes.

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



BOARD OF DIRECTORS AGENDA

2019 BOARD OF DIRECTORS

(revision as of -1-30-19)

County	Members	Alternates
San Luis Obispo: 1 vote	Fred Strong Council Member, City of Paso Robles Member, San Luis Obispo Council of Governments	Jeff Lee Mayor, City of Grover Beach Member, San Luis Obispo Council of Governments Andy Pease Vice Mayor, City of San Luis Obispo Member San Luis Obispo Council of Governments
Santa Barbara: 1 vote	Gregg Hart Supervisor, 2nd District Santa Barbara County Board of Supervisors Member, Santa Barbara County Association of Governments	Cathy Murillo Mayor, City of Santa Barbara Member, Santa Barbara County Association of Governments
Ventura: 1 vote	Bryan MacDonald Council Member, City of Oxnard Member, Ventura County Transportation Commission	Jim White Representative, Ventura County Transportation Commission
Los Angeles: 2 votes	(Vacant) John Fasana Mayor, City of Duarte Member, Los Angeles County Metropolitan Transportation Authority	David Perry Representative, Los Angeles County Metropolitan Transportation Authority Mary Lou Echternach Representative, Los Angeles County Metropolitan Transportation Authority
Orange: 2 votes	Al Murray (Chairman) Executive Director, City of Tustin Chamber of Commerce Representing, Orange County Transportation Authority Tim Shaw Council Member, City of La Habra Member, Orange County Transportation Authority	Laurie Davies Mayor Pro Tem, City of Laguna Beach Member, Orange County Transportation Authority Mark A. Murphy Mayor, City of Orange Member, Orange County Transportation Authority



BOARD OF DIRECTORS AGENDA

County	Members	Alternates
Riverside: 1 vote	Dana Reed (Vice Chairman) Council Member, City of Indian Wells Member, Riverside County Transportation Commission	(Vacant)
San Diego: 2 votes	Jewel Edson Deputy Mayor, City of Solana Beach Member, North County Transit District Caylin Frank Council Member, City of Poway Member, San Diego Metropolitan Transit System Ellie Haviland Deputy Mayor, City of Del Mar Member, San Diego Association of Governments	Priya Bhat-Patel Mayor Pro Tem, City of Carlsbad Member, North County Transit District Bill Sandke Mayor Pro Tem, City of Coronado Member, San Diego Metropolitan Transit System Ron Morrison Vice Mayor, City of National City Member, San Diego Association of Governments
Ex-Officio Members:		
Amtrak	Eric Hosey Representative, Amtrak	
California Department of Transportation	Kyle Gradinger Representative, California Department of Transportation	
California High-Speed Rail Authority	Michelle Boehm California High-Speed Rail Authority	
Southern California Association of Governments	Alan D. Wapner Council Member, City of Ontario Member, Southern California Association of Governments	



BOARD OF DIRECTORS AGENDA

Call to Order

Pledge of Allegiance

1. Public Comments

At this time, members of the public may address the Board of Directors regarding any items within the subject matter jurisdiction of the Board of Directors, but no action may be taken on off-agenda items unless authorized by law. Comments shall be limited to three (3) minutes per speaker, unless different time limits are set by the Chairman subject to the approval of the Board of Directors.

Special Calendar

There are no Special Calendar Matters.

Consent Calendar (Items 2 and 3)

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.

2. Approval of Minutes

Approval of the minutes of the LOSSAN Board of Directors meeting of January 30, 2019.

3. Amendments to Pacific Surfliner Transit Transfer Agreements

Michael Litschi

Overview

On November 16, 2015, the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors authorized the Managing Director to accept \$1.675 million in Transit and Intercity Rail Capital Program funding to support the Pacific Surfliner Transit Transfer Program, which allows Pacific Surfliner passengers to transfer more seamlessly to connecting public transit services. The Board of Directors also authorized the Managing Director to negotiate and execute agreements with participating local transit agencies. Four of those agreements require funding amendments to allow for the continuance of the Pacific Surfliner Transit Transfer Program.

BOARD OF DIRECTORS AGENDA

3. (Continued)

Recommendations

- A. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0010 with Anaheim Transportation Network in the amount of \$84,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$124,000.
- B. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0016 with the City of Glendale in the amount of \$30,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$35,000.
- C. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0005 with the Santa Barbara Metropolitan Transit District in the amount of \$144,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$184,000.
- D. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0012 with the Ventura County Transportation Commission in the amount of \$72,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$87,000.

Regular Calendar

4. **Agreement for San Diego County Layover and Maintenance Facility Study** Jennifer L. Bergener

Overview

On September 17, 2018, the Board of Directors approved the release of a request for proposals for consultant services to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County. Proposals have been received and evaluated in accordance with the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency's procurement policies and procedures for professional and technical services. Approval is requested to negotiate and execute an agreement for these services.

BOARD OF DIRECTORS AGENDA

4. (Continued)

Recommendations

- A. Approve the selection of WSP USA, Inc., to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-9-0003 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and WSP USA, Inc., in the amount of \$299,600 for a one-year term to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County.

5. Draft Business Plan for Fiscal Years 2019-20 and 2020-21

Roger M. Lopez

Overview

The Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency is required to submit an annual business plan to the California State Transportation Agency by April 1 of each year that provides the basis for its annual budget request, outlines operations and service goals, and discusses any proposed changes to the Pacific Surfliner service. Staff has prepared an outline and selected draft chapters of the business plan for fiscal years 2019-20 and 2020-21 for the Board of Directors' review.

Recommendation

Direct staff to incorporate comments received from the Technical Advisory Committee, member agencies, and the Board of Directors into the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Business Plan for Fiscal Years 2019-20 and 2020-21, and return to the Board of Directors on March 18, 2019 to seek final approval.

6. Pacific Surfliner Marketing Update

Emilia Doerr

Overview

The Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency is responsible for marketing the Pacific Surfliner service and setting an annual work plan to enhance public awareness of the service and increase ridership and revenue. A marketing update is presented to the Board of Directors each quarter. This report provides a summary of marketing activities and performance through January 2019.

Recommendation

Receive and file as an information item.



BOARD OF DIRECTORS AGENDA

Discussion Items

7. **Managing Director's Report**
8. **Board Members' Report**
9. **Closed Session**

There is no Closed Session scheduled.

10. **Adjournment**

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

Monday, March 18, 2019

11:15 a.m. – 12:45 p.m. (potential new meeting time)

Orange County Transportation Authority Headquarters

Board Room – Conference Room 07

550 South Main Street

Orange, California



MINUTES

Board of Directors' Meeting

Call to Order

The January 30, 2019 Board of Directors (Board) meeting of the Los Angeles - San Diego - San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) was called to order by Chairman MacDonald at 12:30 p.m., at the Orange County Transportation Authority (OCTA) Headquarters, Board Room – Conference Room 07, 550 South Main Street, Orange, California.

Chairman MacDonald announced that several of the Directors would participate in today's meeting via teleconferencing, and all votes would be taken by roll call.

Directors Present: Al Murray, Chairman
 Dana Reed, Vice Chairman
 Bryan MacDonald, Immediate Past Chairman
 Jewel Edson, NCTD (teleconference)
 John Fasana, Metro
 Gregg Hart, SBCAG
 Ellie Haviland, SANDAG
 David Perry, Metro
 Fred Strong, SLOCOG
 Alan D. Wapner, SCAG, Ex -Officio
 Michelle Boehm, CHSRA, Ex-Officio
 Eric Hosey, Amtrak, Ex-Officio
 Andy Cook, Caltrans, (for Kyle Grading, Ex-Officio)

Directors Absent: Tim Shaw, OCTA
 Caylin Frank, SDMTS
 Kyle Grading, Caltrans, Ex-Officio

Staff Present: Jennifer L. Bergener, Managing Director
 Gina Ramirez, LOSSAN Agency Deputy Clerk of the Board
 James Donich, General Counsel

Pledge of Allegiance

The pledge of allegiance was led by Vice Chairman Murray.

Following the pledge of allegiance, Chairman MacDonald led the audience in a moment of silence in memory of Director Greg Pettis.

1. Public Comments

Public comments were heard from:

Eric Reese, reported that as an avid fan and rider, he is looking at ways to help increase customer satisfaction, improve operational efficiencies, increase fare box recovery, and help expand service. He urged the LOSSAN Agency Board of Directors (Board) to consider working with sports and entertainment venues across the LOSSAN corridor to consolidate ticketing for Pacific Surfliner fares and event venue ticketing under one location on the web. He added that some of the venues to consider working with would be the FivePoint Amphitheatre, Disneyland, Los Angeles Angels, 2028 Olympics, and Comic-Con.

Fred Hottinger, (via teleconference from San Diego), representing the Train Coalition, Santa Fe Depot, congratulated and welcomed the new Board Members. Mr. Hottinger commented that the City of San Diego has three train stations (including two served by Amtrak), and the LOSSAN Agency does not have Board representative from the City of San Diego.

Janet Rogers, (via teleconference from San Diego), also representing the Train Coalition, Santa Fe Depot, reported that the Train Coalition recently met with several LOSSAN Agency staff and Board Members to discuss operational changes to lower the overnight noise at the Santa Fe Depot. She expressed her appreciation for the commitment from LOSSAN Agency staff to look at the different issues raised and said the Coalition is looking forward to the analysis.

Paul Herstein, (via teleconference from San Diego), also representing the Train Coalition, Santa Fe Depot, expressed the Train Coalition's appreciation for the new Siemens engines that are now operating on the Pacific Surfliner service at the Santa Fe Depot. He stated that the Train Coalition would appreciate staff continuing to provide updates and detailed information regarding the delays in placing the additional engines into service.

Special Calendar

2. Administration of the Oath of Office to New Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors

The oath of office was administered by James Donich, General Counsel, to the new Board Members present at the meeting and to those participating via teleconference.

3. Election of Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors Chairman

A motion was made by Chairman MacDonald, seconded by Director Strong, and following a roll call vote, declared passed 8-0, to elect current Vice Chairman Al Murray as Chairman of the LOSSAN Rail Corridor Agency Board of Directors for 2019.

Director Fasana was not present to vote on this item.

4. Election of Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors Vice Chairman

Newly-elected Chairman Murray nominated Director Reed as the Vice Chairman for the LOSSAN Agency Board of Directors for 2019.

A motion was made by newly-elected Chairman Murray, seconded by Director Strong, and following a roll call vote, declared passed 8-0, to elect Director Dana Reed as Vice Chairman of the LOSSAN Rail Corridor Agency Board of Directors for 2019.

Director Fasana was not present to vote on this item.

5. Salute to Outgoing Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors and Retiring Amtrak Police K-9 Officer

Jennifer L. Bergener, Managing Director, presented LOSSAN Resolutions of Appreciation to outgoing Board Member Michael T. Bennett and retiring Amtrak Police K-9 Officer Teddy.

Director Bennett thanked the Board, the LOSSAN Managing Director and staff, and stated he enjoyed serving on the Board the past two years.

Officer Wolf thanked the Board for their recognition of Police K-9 Officer Teddy.

Director Hart thanked Director Bennett for his service to the LOSSAN Agency and for his commitment to regional train service.

Consent Calendar (Items 6 through 12)

6. Approval of Minutes

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to approve the minutes of the LOSSAN Board of Directors meeting of November 28, 2018.

Director Fasana was not present to vote on this item.

7. Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Fiscal Year 2017-18 Annual Financial Audit

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to receive and file the fiscal year 2017-18 Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency audited annual financial statements and accompanying independent auditor's report.

Director Fasana was not present to vote on this item.

8. Agreement for Project Report and Environmental Documentation Services for the Central Coast Layover Facility Expansion Project

This item was pulled by Director Strong, who commented that it appears that if STV Incorporated's (STV) proposed technical leads had attended the interview, STV could have been selected for the contract. He added that it is unfortunate that a company would take the time to submit a proposal and not attend the interview.

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to:

- A. Approve the selection of HDR Engineering, Inc. to provide a project report and environmental document for the Central Coast Layover Facility Expansion Project.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-8-1897 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and HDR Engineering, Inc. for project report and environmental documentation services for the Central Coast Layover Facility Expansion Project.
- C. Approve Resolution No. 2019-L005 authorizing the Managing Director to act on behalf of the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency to execute any agreements, amendments, and program supplements necessary for the utilization of state transportation improvement funds.

Director Fasana was not present to vote on this item.

9. Cooperative Agreement for On-Time Performance Incentive Program with North County Transit District

This item was pulled by Director Strong, who reported that he read the entire contract and proposal, and would like to know how the contract compliance and effectiveness will be reviewed and provided to the Board.

Jennifer L. Bergener, Managing Director, responded that the LOSSAN Agency will receive monthly invoices and coordinate with North County Transit District (NCTD) and Amtrak to review the performance. In addition, the LOSSAN Agency provides a quarterly budget status report to the Board and any payments made to NCTD through the agreement will be included in that report. Lastly, LOSSAN staff will continue to bring its regular quarterly performance metrics report that includes an analysis of on-time performance and progress, with specific focus placed on this area of the corridor.

Director Hart inquired if there is an accounting for what NCTD spends the revenue on to improve on-time performance, and that it would be helpful to have a report in the future to reflect investments.

James D. Campbell, Deputy Managing Director, responded that it is not currently envisioned to have specific accounting for expenditures of the incentive payments; however, expenditures of the payments are required to be directed toward the overall maintenance of the railroad to maintain a safe operating condition.

Ms. Bergener added that conversations were held leading into the negotiation of this contract, and it is expected that the LOSSAN Agency will include, in its annual report, the performance of grant funds.

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to authorize the Managing Director to negotiate and execute Agreement No. L-9-0002 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and North County Transit District to implement an On-Time Performance Incentive Program.

Director Fasana was not present to vote on this item.

10. Agreement for Viriato Software Purchase

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to:

- A. Authorize the Managing Director to negotiate and execute Agreement No. L-8-0021 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and SMA and Partners Ltd., Switzerland, in the amount of \$195,480, for Viriato rail planning software and maintenance services.

10. (Continued)

- B. Authorize the Managing Director to negotiate and execute Agreement No. L-8-0022 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and TRENOLab Srl., in the amount of \$24,000, for Viriato rail planning software and maintenance services.
- C. Authorize the Managing Director to negotiate and execute Agreement No. L-8-0023 between the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency and Deutsche Bahn Engineering & Consulting USA, Inc., in the amount of \$60,000, for Viriato rail planning software and maintenance services.

Director Fasana was not present to vote on this item.

11. Final Draft of the 2019 Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Legislative Program

A public comment was heard from Eric Reese, who urged the LOSSAN Board and staff to develop a plan to advocate to the state and federal government for right-of-way grant money to be used to acquire the Union Pacific (UP)-owned Santa Barbara Subdivision and the southern portion of the UP Yuma Subdivision from the Colton Crossing to the future Indio Station. He added that having reliable and dependable rail transportation on these corridors would help provide a back-up plan in the event of a severe travel disruption on freeways in those areas, allow the LOSSAN Agency the ability to increase its number of train slots, provide freedom to use tilting trains, and allow the Agency to sell time slots back to UP and generate revenue.

A motion was made by Director Strong, seconded by Chairman Murray, and following a roll call vote, declared passed 8-0, to adopt the final draft of the 2019 Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Legislative Program.

Director Fasana was not present to vote on this item.

12. Fiscal Year 2018-19 First Quarter Budget Status Report

A motion was made by Chairman Murray, seconded by Director Strong, and following a roll call vote, declared passed 8-0, to receive and file as an information item.

Director Fasana was not present to vote on this item.

Regular Calendar

13. Annual Business Plan and Budget Assumptions for Fiscal Year 2019-20 and Fiscal Year 2020-21

Jason Jewell, Finance and Administration Manager, provided an overview of the LOSSAN Agency's business plan process and deadline requirements, and reported on general and high-level assumptions that will be used and incorporated into the business plan and budget as follows:

- Implementation of a new roundtrip between San Diego and San Luis Obispo;
- Modeling of various operating forecast scenarios with Amtrak;
- Additional service for holidays and special events;
- If no changes to service, 1 percent ridership growth and 2 percent revenue growth if no changes to service;
- If the 13th roundtrip is implemented, 2 percent ridership growth and 2.5 percent revenue growth;
- Continuation of the Rail 2 Rail Program with both Metrolink and COASTER, and continuation of the Pacific Surfliner Transit Transfer Program;
- Addition of one full-time Program Manager position;
- For administrative employees, 4 percent performance-based merit increase, and 3 percent special award pool;
- Annual marketing budget of \$2 million, plus use of prior year surplus;
- Minor capital revenue from the state of \$500,000 per year;
- Professional services budget of \$410,000;
- State Rail Assistance funding of \$5.1 million in fiscal year (FY) 2019-20;
- Continue progress on design and construction of the Goleta layover facility expansion, and on planning and design for the central coast layover facility;
- Moving forward with a study for the San Diego Layover Facility; and
- Next steps.

A discussion ensued regarding:

- Clarification that the assumed correct professional services budget amount is \$410,000 and not \$450,000 as noted in the staff report.
- The LOSSAN north corridor optimization work is currently budgeted in FY 2018-19, and any funds that are not utilized in FY 2018-19 will be rolled over and re-budgeted in the next FY.
- The study for the San Diego layover facility contract award is expected to be on the February Board meeting agenda for approval. The schedule for the study is 18 months and staff believes it can be completed in 12 months and will continue to provide updates to the Board.
- The LOSSAN Agency receives an annual marketing budget of \$2 million from the state, and staff will continue to look at the annual marketing plan to determine if there is a need for additional resources.

13. (Continued)

- The LOSSAN Agency is not permitted to lobby as defined by the interagency transfer agreement and state regulations related to funding provided to the LOSSAN Agency, and there are resources set aside in the event the LOSSAN Agency needs to retain its own advocacy firm. Historically, the LOSSAN Agency has used its managing agency, OCTA, to help set-up and facilitate meetings in Sacramento and in Washington, D.C., on an as needed basis.

A motion was made by Director Strong, seconded by Director MacDonald, and following a roll call vote, declared passed 9-0, to direct staff to incorporate the key assumptions into the development of the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency business plan for fiscal year 2019-20 and 2020-21.

14. Capital Improvement Program - Priority Projects List

Jennifer L. Bergener, Managing Director, provided background information on the Capital Improvement Program and reported on the following:

- Attachments A and B to the Staff Report were presented to the Technical Advisory Committee (TAC) at its last meeting and some concerns were raised;
- The TAC offered comments and asked for an opportunity to have additional time to weigh-in on this list of projects and possibly provide ways that the TAC may be able to help LOSSAN fund some of these projects;
- Taking into consideration that some of the funds date back to FY 2017-18 and the LOSSAN Agency has been very vocal in Sacramento about its need for funding, LOSSAN staff feels the funding should not be left unprogrammed;
- This is a “living” list and can be modified as necessary, and an example, should the LOSSAN Agency get to a place where one of these projects comes in to be more cost-prohibitive than currently identified, that project would be brought back to the TAC and the Board as necessary;
- The list of projects is not intended to be so prescriptive as to eliminate future projects;
- Following input from the TAC, staff understands that there are additional needs/projects that will be considered for future year funding, including Del Mar Bluff Stabilization, Coachella Valley Special Services, and the Batiquitos Lagoon Infrastructure Project; and
- Recommendation that the Board move forward with the project list, and it will be included in the annual business plan and provide opportunities to modify the list and solicit input from the Board, stakeholders, and the TAC.

14. (Continued)

Director Fasana reported that LA Metro is appreciative for receiving funding for the Chatsworth Station tactile and striping. He added that there is a wider array of improvements that need to be made at the Station and asked staff to work together as more funding elements of these projects are put together to ensure that there are not “throw-away” costs.

Director Haviland inquired on the process and criteria if there are comments on existing or new projects from the TAC or Board to bring forward for future consideration. In addition, she noted that some of these funds are improving facilities at privately-owned stations, and asked if any of the contracts allow for reimbursements for these capital improvement projects.

Ms. Bergener responded that the Board can contact her at any time, and it is expected that each of the business plan chapters will be taken to the TAC for input. Ms. Bergener added that for projects that are a shared-used facility, the LOSSAN Agency would be looking for cost-sharing.

A motion was made by Chairman Murray, seconded by Director Strong, and following a roll call vote, declared passed 9-0, to:

- A. Review and approve the proposed Los Angeles - San Diego - San Luis Obispo rail corridor capital improvement program.
- B. Authorize the Managing Director to negotiate and execute the necessary agreements and program supplements to facilitate the utilization of State Rail Assistance and minor capital improvement project funding.
- C. Authorize the Managing Director to utilize up to \$100,000 in either minor capital project or State Rail Assistance funds for emergency capital projects.

Discussion Items

15. Managing Director's Report

Jennifer L. Bergener, Managing Director, reported on the following:

- LOSSAN Agency staff met with the Train Coalition, Santa Fe Depot, and efforts continue to mitigate impacts to the surrounding neighborhood and the San Diego Layover Facility Study was also addressed.

15. (Continued)

- Last week, LOSSAN Agency staff met with the Southern California Leadership Group, and significant progress has been made. It is anticipated the Memorandum of Understanding (MOU) between the various agencies will be completed within the next 30 days and the MOU will be forwarded to the Board for consideration.
- Ms. Bergener talked to Stephanie Wiggins, new Chief Executive Officer of Metrolink, and Ms. Wiggins is supportive of the continuance of the Rail 2 Rail Program.
- Staff is working on a graphic user interface which is an overlay that goes on top of each of the passenger rail operators' mobile applications. To the end user, this looks like one App and lists all options regardless of the service provider. This is fully supported by NCTD and the Southern California Regional Rail Authority and provides the first significant step towards full integration.
- The 13th roundtrip is something that LOSSAN Agency staff continues to work on.
- The Rosecrans/Marquardt Triple Track Project has been delayed, and the 13th roundtrip will likely be implemented in October 2019.
- The LOSSAN Agency currently has 12 Siemens Charger locomotives in Southern California, issues have persisted with putting the engines into service, and staff is working in close coordination with Amtrak, the California Department of Transportation, and Siemens to address the issues.

16. Board Members' Report

Director Wapner thanked the LOSSAN Board for their warm welcome and thanked former Board Member, Art Brown, for his service to the LOSSAN Agency representing Southern California Association of Governments.

Director Hart, Santa Barbara County Association of Governments (SBCAG), introduced himself and thanked the Board for its warm welcome. He reported that he comes to the Board with a great deal of experience as he was the Executive Deputy Director for SBCAG for 14 years and was intimately involved with rail planning issues.

Director Strong reported that he will be in Washington, D.C., in a couple of weeks, representing the State of California's Regional Governments and as a Transportation Policy Chair for all the Regional Governments of the United States.

Director Strong asked if staff would consider the public comment received for the acquisition of track both within LOSSAN's current corridor and going north, or to sometime in the future, provide a report on the feasibility and procedure to do this.

16. (Continued)

Director MacDonald reported that he is looking forward to the upcoming year.

Director Haviland reported that the San Diego Association of Governments just completed a mile and a half section of double-tracking in Encinitas. She also thanked Ms. Bergener, Managing Director, for her professionalism during the Train Coalition meeting.

Chairman Murray welcomed the new Board Members, thanked Immediate Past Chairman MacDonald for his leadership, and reported that he is looking forward to a very productive year.

17. Closed Session

There was no Closed Session scheduled.

18. Adjournment

The meeting of the LOSSAN Agency's Board adjourned at 1:36 p.m. The next regularly scheduled meeting of this Board will be held:

Wednesday, February 20, 2019

12:30 p.m. – 2:30 p.m.

Orange County Transportation Authority Headquarters

Board Room – Conference Room 07

550 South Main Street

Orange, California

ATTEST:


Al Murray
LOSSAN Chairman

Gina Ramirez
LOSSAN Agency
Deputy Clerk of the Board



February 20, 2019

To: Members of the Board of Directors

From: Jennifer L. Bergener, Managing Director 

Subject: Amendments to Pacific Surfliner Transit Transfer Agreements

Overview

On November 16, 2015, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Board of Directors authorized the Managing Director to accept \$1.675 million in Transit and Intercity Rail Capital Program funding to support the Pacific Surfliner Transit Transfer Program, which allows Pacific Surfliner passengers to transfer more seamlessly to connecting public transit services. The Board of Directors also authorized the Managing Director to negotiate and execute agreements with participating local transit agencies. Four of those agreements require funding amendments to allow for the continuance of the Pacific Surfliner Transit Transfer Program.

Recommendations

- A. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0010 with Anaheim Transportation Network in the amount of \$84,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$124,000.
- B. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0016 with the City of Glendale in the amount of \$30,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$35,000.
- C. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0005 with the Santa Barbara Metropolitan Transit District in the amount of \$144,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$184,000.

- D. Authorize the Managing Director to negotiate and execute Amendment No. 3 to Cooperative Agreement No. L-6-0012 with the Ventura County Transportation Commission in the amount of \$72,000 to provide ongoing reimbursement for transit transfers by Pacific Surfliner passengers. This will increase the maximum obligation of the cooperative agreement to a total value of \$87,000.

Background

In June 2015, the California State Transportation Agency (CalSTA) awarded \$1.675 million of 2015 Transit and Intercity Rail Capital Program (TIRCP) funds to the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) to allow the creation of a Pacific Surfliner Transit Transfer Program (Program) on a one-year pilot basis. The Program allows Pacific Surfliner passengers to transfer to 11 connecting transit services for free at shared stations by presenting a valid Pacific Surfliner ticket. Each participating transit agency is then reimbursed by the LOSSAN Agency on a quarterly basis for the number of Pacific Surfliner passengers carried subject to a reimbursement agreement and a negotiated average base fare.

On November 16, 2015, the LOSSAN Agency Board of Directors (Board) authorized the Managing Director to accept the \$1.675 million in TIRCP grant funds and to negotiate and execute agreements with the transit agencies participating in the Program. Cooperative agreements were executed with participating transit agencies in early 2016, and the Program was launched in July 2016.

Discussion

Since the Program began, cooperative agreements with participating transit agencies have been amended two times to allow for the continuance of the Program. Amendment No. 1 extended the period of performance an additional year, through June 30, 2018, and Amendment No. 2 extended the period of performance an additional three years through June 30, 2021. To date, nearly 125,000 transfers have been reimbursed to participating transit agencies through the Program.

Due to the extension of the Program beyond the initial one-year pilot period, as well as high utilization of the Program at several agencies, cooperative agreements with four transit providers require amendments to increase the maximum contract obligation to allow for the continuance of the Program.

Proposed amendments have been drafted for Agreement Nos. L-6-0010, L-6-0016, L-6-0005, and L-6-0012 with the Anaheim Transportation Network, City of Glendale, Santa Barbara Metropolitan Transit District, and

Ventura County Transportation Commission, respectively, to increase the maximum value of the cooperative agreements based on projected usage through June 30, 2021. Agreements with other transit agencies participating in the Program currently have sufficient value remaining and do not need to be amended at this time.

The LOSSAN Agency's Contracting and Procurement Policy requires that all contract amendments with a value of more than \$100,000 and/or a value of more than 15 percent of the original contract amount, be approved by the Board. The draft LOSSAN Agency business plan for fiscal year 2019-20 and 2020-21 assumes the continuation of the Program using remaining TIRCP funds, which can be supplemented with future operating funds if necessary.

Summary

On November 16, 2015, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Board of Directors authorized the Managing Director to accept \$1.675 million in Transit and Intercity Rail Capital Program grant funds to support the Pacific Surfliner Transit Transfer Program, which was initiated in July 2016. Board of Directors approval is required to amend agreements with four local transit operators to allow for the continuance of the Pacific Surfliner Transit Transfer Program with these agencies.

Attachment

None.

Prepared by:




Michael Litschi
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February 20, 2019

To: Members of the Board of Directors

From: Jennifer L. Bergener, Managing Director 

Subject: Agreement for San Diego County Layover and Maintenance Facility Study

Overview

On September 17, 2018, the Board of Directors approved the release of a request for proposals for consultant services to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County. Proposals have been received and evaluated in accordance with the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's procurement policies and procedures for professional and technical services. Approval is requested to negotiate and execute an agreement for these services.

Recommendations

- A. Approve the selection of WSP USA, Inc., to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-9-0003 between the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency and WSP USA, Inc., in the amount of \$299,600 for a one-year term to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County.

Discussion

The Pacific Surfliner service is currently supported by three layover facilities in San Diego, Goleta, and San Luis Obispo, as well as a primary maintenance and layover facility near downtown Los Angeles. The existing Amtrak layover facility in San Diego is located at the Santa Fe Depot in downtown San Diego. This facility is currently constrained, which prohibits the ability to expand the existing facility to advance service expansion and enhancement goals for the Pacific Surfliner.

The purpose of the San Diego County Maintenance and Layover Facility Study (Study) is to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service near the southern terminus of the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor in San Diego County that can support the long-term service objectives included in the State Rail Plan and the LOSSAN Rail Corridor Agency's (Agency) Business Plan.

Procurement Approach

The procurement was handled in accordance with the LOSSAN Agency's Board of Directors (Board)-approved procedures for professional and technical services. In addition to cost, many other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as staffing and project organization, prior experience with similar projects, work plan, and a fair and reasonable price structure.

On September 17, 2018, the LOSSAN Agency's Board authorized the release of Request for Proposals (RFP) 8-1933, which was issued and sent electronically to 3,519 firms through the Orange County Transportation Authority's (OCTA) Contract Administration and Materials Management website portal. The Study was advertised in a newspaper of general circulation on September 17 and September 24, 2018. A pre-proposal conference was held on September 24, 2018, with 15 attendees representing 11 firms. Two addenda were issued to provide a copy of the pre-proposal registration sheet and presentation, as well as to respond to questions related to the RFP.

On October 16, 2018, four proposals were received. An evaluation committee consisting of LOSSAN Agency staff, OCTA staff, as well as external representatives from Amtrak, North County Transit District, and the San Diego Association of Governments met to review all proposals received. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

- | | |
|-------------------------------------|------------|
| • Work Plan | 30 percent |
| • Qualifications of the Firm | 25 percent |
| • Staffing and Project Organization | 25 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing the evaluation criteria weights. Work plan was weighted at 30 percent to emphasize the importance of the firm demonstrating its approach in effectively evaluating the benefits and constraints of

potential locations that can support the current and long-term needs of passenger rail operations along the LOSSAN rail corridor. Qualifications of the firm was weighted at 25 percent to ensure the successful firm had prior experience and a proven track record for meeting the requirements outlined in the scope of work. Staffing and project organization was also weighted at 25 percent as the firm's proposed project team needed to demonstrate familiarity with required specializations in terms of knowledge, skills, and experience. Cost and price was weighted at 20 percent to ensure the LOSSAN Agency received the best value for the requested services.

On October 30, 2018, the evaluation committee reviewed all proposals received based on the evaluation criteria and short-listed two firms. The two short-listed firms are listed below in alphabetical order:

Firm and Location

RailPros, Inc. (RailPros)
Irvine, California

WSP USA, Inc. (WSP)
San Diego, California

On November 14, 2018, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation to demonstrate the firms' understanding of the LOSSAN Agency's requirements. The firms' project managers and key team members had an opportunity to present qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firms' experience in performing similar studies, understanding of the scope of work, and experience working with the key stakeholders, as well as specific clarification questions related to each firm's proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores, which resulted in a change to the ranking of the firms.

Based on the evaluation of the written proposals and information obtained from the interviews, the evaluation committee recommends WSP for consideration of award. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

WSP has been providing professional consulting services for over 100 years, and the firm has four main offices in the Southern California region, including the

counties of Orange, Los Angeles, San Bernardino, and San Diego. With approximately 42,000 employees company-wide, the firm currently employs 80 in its Orange County office and 60 in their San Diego County office. WSP has prior experience performing similar studies for transportation agencies within California, including North County Transit District and San Bernardino County Transportation Authority. The firm proposed to utilize one subcontractor to assist with real estate appraisal, property acquisition relocation, and land services. WSP's references reported that they were satisfied with the firm's performance, and the proposal highlights the firm's ability to provide the services outlined in the scope of work.

Founded in 2000 and with more than 600 employees nationwide, RailPros is headquartered in the city of Irvine and has a total of 11 offices in Los Angeles, San Diego, Riverside, Northern California, Texas, Utah, and Virginia. The firm has prior experience performing similar studies for transportation agencies within California, including the San Diego Metropolitan Transit System, Metrolink, and the Los Angeles County Metropolitan Transportation Authority. RailPros proposed to utilize two subcontractors to assist with right-of-way engineering and environmental services. The firm's references reported that they were satisfied with RailPros' performance, and the proposal highlights the firm's ability to provide the services outlined in the scope of work.

Staffing and Project Organization

WSP proposed a qualified project team with relevant experience. The proposed project manager has over 35 years of experience managing rail and transit projects, as well as corridor studies in San Diego County. The project team members' years of experience range from 17 years to 49 years, and the team is structured with a lead for each task to ensure all project tasks are completed in a timely manner. WSP's proposed staffing plan demonstrated an effective project management approach to ensure sufficient availability of resources to complete the scope of work. During the interview, the project team members discussed their roles in completing the Study, as well as responded to the evaluation committee's questions.

RailPros proposed a qualified project team with relevant experience. The proposed project manager has over 35 years of experience managing similar projects. The project team members' years of experience range from 10 years to 40 years, and the team is structured with a lead for each task to ensure all project tasks are completed in a timely manner. RailPros' proposed staffing plan lacked sufficient availability of key resources to complete the scope of work. During the interview, the project team members discussed their roles in completing the Study, as well as responded to the evaluation committee's questions.

Work Plan

WSP's work plan demonstrated an understanding of the tasks and deliverables included in the scope of work. The firm included a detailed approach to evaluating the benefits and limitations of potential locations that can support the current and long-term needs of passenger rail operations along the LOSSAN rail corridor, including environmental constraints and right-of-way acquisitions. WSP also included a sampling of potential locations and a schedule for completing the Study, as well as project development meetings and a stakeholder participation plan to ensure effective communication with all stakeholders involved. The firm proposed enhancements to the scope of work and addressed methods for ensuring quality control of final reports. During the interview, WSP discussed their approach for identifying and evaluating potential sites, as well as provided responses to the evaluation committee's questions. In addition, the firm detailed how it would gain interagency coordination and build consensus among all the stakeholders.

RailPros' work plan demonstrated an understanding of the tasks and deliverables included in the scope of work. The firm included a sampling of potential sites and a schedule for completing the Study. RailPros proposed enhancements to the scope of work and addressed methods for ensuring quality control of final reports. During the interview, the firm discussed their approach for identifying and evaluating potential sites, as well as provided responses to the evaluation committee's questions.

Cost and Price

Pricing scores are based on a formula which assigned the highest score to the firm with the lowest total firm-fixed price and scored the other proposal's total firm-fixed price based on its relation to the lowest total firm-fixed price. WSP's proposed total firm-fixed price is deemed fair and reasonable as it is lower than the independent cost estimate, as well as competitive to the total firm-fixed prices proposed by the other firms.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of WSP as the top-ranked firm to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego County.

Fiscal Impact

Funding for this Study was approved in the LOSSAN Agency's Fiscal Year (FY) 2018-19 Annual Business Plan and is included in the FY 2018-19 budget approved by the California State Transportation Agency.

Summary

Based on the information provided, Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency staff recommends the Board of Directors authorize the Managing Director to negotiate and execute Agreement No. L-9-0003 with WSP USA, Inc., in the amount of \$299,600, to identify and evaluate potential locations for a new maintenance and layover facility for the Pacific Surfliner intercity passenger rail service in San Diego.

Attachments

- A. Review of Proposals, RFP 8-1933 San Diego County Maintenance Layover Facility Study
- B. Proposal Evaluation Criteria Matrix (Short-listed Firms), RFP 8-1933 San Diego County Layover and Maintenance Facility Study
- C. Contract History for the Past Two Years, RFP 8-1933 San Diego County Layover and Maintenance Facility Study

Review of Proposals
RFP 8-1933 San Diego County Maintenance Layover Facility Study
Presented to LOSSAN Board of Directors - February 20, 2019
4 proposals were received, 2 firms were interviewed, 1 firm is being recommended

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Total Firm-Fixed Price
1	83	WSP USA, Inc. San Diego, California	Bender Rosenthal, Inc.	Highest-ranked firm overall. Prior experience performing similar studies. Proposed project manager has over 35 years of relevant experience. Proposed project team is experienced and structured with a lead for each task to ensure completion of all project tasks. Proposed staffing plan includes sufficient availability of key resources to complete the scope of work. Detailed approach for completing each task and producing deliverables. Presented a sampling of potential sites and a schedule for completing the study. Presented approach and answered questions during the interview. Detailed approach in gaining interagency coordination and building consensus among the stakeholders. Received positive responses from references. Proposed competitive pricing.	\$299,600
2	78	RailPros, Inc. Irvine, California	Bender Rosenthal, Inc. Rincon Consultants	Second-ranked firm overall. Prior experience performing similar studies. Proposed project manager has over 35 years of relevant experience. Proposed project team is experienced and structured with a lead for each task to ensure completion of all project tasks. Proposed staffing plan lacked sufficient availability of key resources to complete the scope of work. Detailed approach for completing each task and producing deliverables. Presented a sampling of potential sites and a schedule for completing the study. Presented approach and answered questions during the interview. Addressed interagency coordination and building consensus among the stakeholders. Received positive responses from references. Proposed the lowest total firm-fixed price.	\$244,500

Evaluation Panel:

Internal

Contracts Administration and Materials Management (1)
LOSSAN (1)

External

San Diego Association of Governments (1)
North County Transit District (1)
Amtrak (1)

Proposal Criteria

Qualifications of the Firm
Staffing and Project Organization
Work Plan
Cost and Price

Weight Factors

25%
25%
30%
20%

PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed Firms)
RFP 8-1933 San Diego County Layover and Maintenance Facility Study

FIRM: WSP USA, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.5	4.0	4.0	4.5	4.0	5	21.0
Staffing/Project Organization	4.0	4.0	4.0	4.5	4.0	5	20.5
Work Plan	4.5	4.0	4.0	4.0	4.0	6	24.6
Cost and Price	4.1	4.1	4.1	4.1	4.1	4	16.4
Overall Score	85.9	80.4	80.4	85.4	80.4		83

FIRM: RailPros, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	3.5	4.0	3.0	4.0	4.0	5	18.5
Staffing/Project Organization	3.5	3.5	3.5	3.5	3.5	5	17.5
Work Plan	3.5	4.0	3.5	4.0	3.5	6	22.2
Cost and Price	5.0	5.0	5.0	5.0	5.0	4	20.0
Overall Score	76.0	81.5	73.5	81.5	78.5		78

The scores for the two non-short-listed firms were 75 and 63.

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 8-1933 San Diego County Layover and Maintenance Facility Study

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
WSP USA, Inc.						
Contract Type: Contract Task Order	L-6-0021	ON-CALL PLANNING SERVICES FOR COMMUTERAND INTERCITY RAIL SUPPORT	April 1, 2016	February 1, 2019	N/A	\$ 69,517
Subconsultant:						
Cogstone Resource Management						
Epic Land Solutions						
Michael R. Kodoma Planning Consulting						
SMA Rail Consulting + IT Corporation						
Subtotal: \$						69,517
RailPros, Inc.						
	None	N/A	N/A	N/A	N/A	\$ -
Subconsultant: N/A						
Subtotal: \$						-



February 20, 2017

To: Members of the Board of Directors
From: Jennifer L. Bergener, Managing Director
Subject: Draft Business Plan for Fiscal Years 2019-20 and 2020-21

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency is required to submit an annual business plan to the California State Transportation Agency by April 1 of each year that provides the basis for its annual budget request, outlines operations and service goals, and discusses any proposed changes to the Pacific Surfliner service. Staff has prepared an outline and selected draft chapters of the business plan for fiscal years 2019-20 and 2020-21 for the Board of Directors' review.

Recommendation

Direct staff to incorporate comments received from the Technical Advisory Committee, member agencies, and the Board of Directors into the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Business Plan for Fiscal Years 2019-20 and 2020-21, and return to the Board of Directors on March 18, 2019 to seek final approval.

Background

Per the interagency transfer agreement (ITA) between the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) and the California Department of Transportation, and the LOSSAN Joint Powers Agreement, the LOSSAN Agency must develop a business plan to be approved by the LOSSAN Agency Board of Directors (Board) and submitted to the Secretary of the California State Transportation Agency (CalSTA) by April 1 of each year. The business plan is a two-year planning, operations, and budget document, and the LOSSAN Agency's annual budget request must be consistent with the approved business plan.

The initial LOSSAN Agency business plan was submitted to CalSTA concurrent with the ITA in June 2015, and covered fiscal year (FY) 2015-16 and FY 2016-17. It included a detailed background and history on the Pacific Surfliner

service as it was the first business plan prepared by the LOSSAN Agency. The submittal for FY 2019-20 simplifies some of the historical information previously provided, and instead focuses primarily on how the LOSSAN Agency will continue to work toward exceeding the performance metrics established by CalSTA. It outlines operational strategies, equipment maintenance, marketing programs, safety and security measures, as well as a discussion of upcoming planned service expansion. A draft budget will be included as part of the annual business plan but will be revised and resubmitted for final approval by June 30, following receipt of annual operating revenue and expense estimates from Amtrak for federal FY 2019-20. The operating revenue and expense estimates are typically not received from Amtrak until after the April 1 deadline for submitting the annual business plan. As part of the approval letter for the current business plan, CalSTA has allowed for this adjustment to the budget to provide sufficient time for the LOSSAN Agency to address any revisions necessary following the receipt of annual operating expense and revenue estimates from Amtrak.

On January 30, 2019, the LOSSAN Board reviewed a list of key assumptions for the LOSSAN Agency business plan for FY 2019-20 and FY 2020-21, and directed staff to incorporate those assumptions into the final draft of the business plan.

Discussion

An outline of the proposed FY 2019-20 and FY 2020-21 business plan is provided below:

1. Introduction
 - a. Background
 - b. Purpose of plan and audience
 - c. Description of LOSSAN Agency and governance structure
 - d. List of stakeholders
2. Historical Performance of the Pacific Surfliner
 - a. Update on recent and historical performance (ridership, revenue, farebox recovery, on-time performance, service levels)
3. Operating Plan
 - a. Proposed service levels and changes
 - b. Future service planning
4. Performance Standards and Metrics
 - a. Track results and trends against the established metrics
 - b. Outline action plan for future years

5. Capital Improvement Program
 - a. Describe short- and long-term capital improvement programs in LOSSAN rail corridor, including coordination efforts among member agencies
6. Fare Policy
 - a. Discuss current fare policy
 - b. Outline available discounts
7. Network Integration
 - a. Describe how Pacific Surfliner service fits within statewide network integration efforts, including conventional and high-speed rail
 - b. Discuss route and schedule coordination with Amtrak Thruway bus services, other intercity rail corridors, and commuter rail services, including San Joaquins Corridor, Metrolink, and COASTER
 - c. Discuss route and schedule coordination with local transit services
8. Passenger Amenities
 - a. Describe progress in efforts to improve passenger experience, including onboard services, food and beverage, stations, etc.
9. Equipment
 - a. Discuss existing equipment fleet, including limitations and opportunities to expand capacity
 - b. Discuss oversight of equipment maintenance
10. Marketing
 - a. Outline approach for building a strategic framework that drives growth of Pacific Surfliner marketing initiatives
 - b. Describe foundational components necessary to support marketing efforts that leverage cost-effective, data-driven and agile approaches to growing awareness and ridership
11. Funding
 - a. Discussion of annual budget process
 - b. Proposed Amtrak Operating budget, administrative and marketing budget, and capital budget, including proposed funding requirements for the upcoming fiscal years to maintain anticipated level of services
 - c. Discussion of separation of funding between state-funded intercity rail service from locally funded services
12. Government Relations and Legislative Advocacy
 - a. Discuss proposed advocacy efforts at the federal, state, and local levels
 - b. Outline key legislative initiatives per adopted LOSSAN Legislative Program

13. Safety and Security
 - a. Plans to ensure safety and security onboard Pacific Surfliner trains and at stations
 - b. Discuss emergency preparedness efforts in coordination with Amtrak and host railroads
14. Emerging Corridors
 - a. Discuss progress of work on emerging corridors, including Coachella Valley and Coast Daylight services

Next Steps

Staff will incorporate comments received from the Technical Advisory Committee, member agencies and the Board into the draft chapters that have been shared, and finalize the remaining business plan chapters. The remaining draft chapters will be shared with member agencies and stakeholders for comment. The complete final draft of the business plan for FY 2019-20 and FY 2020-21 will be presented to the Board for review and approval at the March 18, 2019 meeting.

Summary

Consistent with the requirements of the interagency transfer agreement, staff has developed an outline of the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency business plan for Fiscal Year 2019-20 and Fiscal Year 2020-21, and drafted select chapters for Board of Directors review. The final draft of the business plan will be submitted to the Board of Directors for review and approval prior to the April 1, 2019, submittal deadline.

Attachment

- A. Draft Fiscal Year 2019-20 and Fiscal Year 2020-21 Business Plan Chapters

Prepared by:



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**LOS ANGELES – SAN DIEGO – SAN LUIS OBISPO
RAIL CORRIDOR AGENCY**

Draft Fiscal Year 2019-20 and Fiscal Year 2020-21 Business Plan Chapters

Chapter 1: Introduction

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency’s (Agency) annual business plan for fiscal year (FY) 2019-20 and FY 2020-21 identifies the LOSSAN Agency’s major goals and objectives for management of the Pacific Surfliner intercity passenger rail service, as well as the budget necessary to administer, market, and operate the Pacific Surfliner service during that two-year period.

Senate Bill (SB) 1225 (Chapter 802, Statutes of 2012), approved in September 2012, authorized the LOSSAN Agency to assume responsibility for managing the state-supported Pacific Surfliner service, subject to negotiation of an interagency transfer agreement (ITA) with the State of California. The initial ITA took effect on July 1, 2015 for a three-year period ending on June 30, 2018. The ITA was subsequently renegotiated for an additional three-year term effective July 1, 2018 through June 30, 2021. The LOSSAN Agency has implemented a number of initiatives aimed at improving the passenger experience on the Pacific Surfliner while also increasing ridership and revenue. The LOSSAN Agency looks forward to continuing to work with the state, Amtrak, and LOSSAN member agencies to ensure the Pacific Surfliner remains a safe, reliable, and cost-effective transportation alternative that is well-integrated with connecting transit services and the state’s other two intercity passenger rail corridors.

Overview of the LOSSAN Rail Corridor

The Pacific Surfliner service operates over the 351-mile LOSSAN rail corridor through six counties in Southern California (San Diego, Orange, Los Angeles, Ventura, Santa Barbara, and San Luis Obispo). It is the busiest state-supported Amtrak operated intercity passenger rail service in the nation. The LOSSAN rail corridor is made up of seven different right-of-way (ROW) owners, including both public agencies and freight railroads (See Table 1.1 and Figure 1.1), and is used by five different passenger rail and freight services (Amtrak, COASTER, Southern California Regional Rail Authority (Metrolink), BNSF Railway (BNSF), and Union Pacific Railroad (UPRR)).

Table 1.1: LOSSAN Rail Corridor ROW Owners

Owner	Route Miles
San Diego Metropolitan Transit System (SDMTS)	22
North County Transit District (NCTD)	38
Orange County Transportation Authority (OCTA)	42
BNSF	21
Los Angeles County Metropolitan Transportation Authority (Metro)	36
Ventura County Transportation Commission (VCTC)	16
UPRR	176
Total	351

Overview of the LOSSAN Agency

The LOSSAN Agency is a joint powers authority (JPA) originally formed in 1989 for the primary purpose of improving passenger rail service along the LOSSAN rail corridor. It is tasked with

increasing ridership, revenue, capacity, reliability, coordination, and safety on the rail line between San Diego, Los Angeles, and San Luis Obispo. The LOSSAN Agency is governed by an 11-member Board of Directors (Board) comprised of officials representing rail owners, operators, and planning agencies along the LOSSAN rail corridor. The LOSSAN Board includes representatives from nine member agencies (Metro, NCTD, OCTA, Riverside County Transportation Commission (RCTC), San Diego Association of Governments (SANDAG), SDMTS, San Luis Obispo Council of Governments (SLOCOG), Santa Barbara County Association of Governments (SBCAG), and VCTC). Amtrak, the California Department of Transportation (Caltrans) Division of Rail and Mass Transportation (DRMT), the California High-Speed Rail Authority (CHSRA), and the Southern California Association of Governments (SCAG) are non-voting, ex-officio members of the LOSSAN Board.

OCTA was selected as the managing agency of the LOSSAN Agency in August 2013, following a competitive request for proposals. As the managing agency, OCTA provides all management and administrative support for the LOSSAN Agency as outlined the Administrative Support Agreement (ASA) between the LOSSAN Agency and OCTA. The LOSSAN Agency currently consists of 11 full-time staff members.

Consistent with the requirements of the ITA, the LOSSAN Agency must submit an annual business plan by April 1 of each year to the Secretary of the California State Transportation Agency (CalSTA). The LOSSAN Agency business plan must be reviewed and approved by the Secretary, and is used to develop an annual appropriation request to the state legislature. As required by SB 1225, the LOSSAN Agency business plan is consistent with the 2018 California State Rail Plan developed by Caltrans DRMT as well as the 2018 CHSRA Business Plan.

The ITA, consistent with the provisions of SB 1225, requires the LOSSAN Agency to maintain the existing Pacific Surfliner service and facilities, and to implement service expansions as warranted by ridership demand and available revenue. The ITA further provides that the state will provide the funding necessary for service operations, administration, and marketing of the Pacific Surfliner service. Caltrans DRMT also remains responsible for the development of the California State Rail Plan, and the coordination and integration between the three state-supported intercity passenger rail services, as outlined in the ITA.

Figure 1.1: LOSSAN Rail Corridor ROW Owners



Agency Roles and Responsibilities

The following list provides a summary of the agencies involved in providing passenger rail service along the LOSSAN rail corridor, and those that the LOSSAN Agency will continue to coordinate with in managing the Pacific Surfliner service.

LOSSAN Agency: JPA legislatively permitted to assume administrative and oversight responsibility of the state-supported Pacific Surfliner intercity passenger rail service on the LOSSAN rail corridor effective July 1, 2015.

LOSSAN Member Agencies: The LOSSAN Agency is comprised of nine voting member agencies. The member agencies are key partners that provide important technical and policy input at both the Technical Advisory Committee (TAC) and Board level.

CalSTA: State office responsible for the funding and oversight of California's three state-supported intercity rail corridors, as well as CHSRA.

Caltrans DRMT: The department within Caltrans that is responsible for development of the State Rail Plan, oversight of state-owned rail equipment, and overall funding and coordination of the three state-supported intercity rail corridors.

Amtrak: The contracted operator of the state-supported Pacific Surfliner service and owner of the majority of the rail cars, utilized in providing Pacific Surfliner service.

Capitol Corridor JPA (CCJPA): Responsible for the operations and oversight of the state-supported Capitol Corridor intercity passenger rail service between San Jose, Oakland, Sacramento, and Auburn. It was the first non-state agency to assume responsibility and oversight for state-supported passenger rail service in California in 1998. Bay Area Rapid Transit was selected as the managing agency for this rail corridor to act on behalf of the CCJPA, similar to OCTA's role on behalf of the LOSSAN Agency.

San Joaquin JPA (SJJPA): Administers the state-supported San Joaquin intercity passenger rail service between Bakersfield, Stockton, Oakland, and Sacramento. The San Joaquin Regional Rail Commission was selected as the managing agency for this rail corridor to act on behalf of the SJJPA, similar to OCTA's role on behalf of the LOSSAN Agency.

OCTA: Selected by the LOSSAN Agency Board as the LOSSAN managing agency, responsible for providing administrative services and daily management of the Pacific Surfliner service and the LOSSAN Agency.

In addition to the agencies listed above, there are a number of stakeholders who are engaged with the LOSSAN Agency on an ongoing basis. These stakeholders include rail operators such as Metrolink, NCTD, and the freight railroads, as well as ROW owners along the rail corridor and the CHSRA. A list of those additional stakeholders is provided below:

Rail Operators
Metrolink

NCTD
BNSF
UPRR
Amtrak

ROW Owners

BNSF
UPRR
NCTD
Metro
OCTA
VCTC
SDMTS

Regional Planning Agencies

SANDAG
SBCAG
SLOCOG
SCAG

Others Key Stakeholders/Partners

CHSRA
Coast Rail Coordinating Council (CRCC)
Coachella Valley Technical Advisory Committee
Federal Railroad Administration (FRA)
Members of the California State Legislature
Members of the United States Congress
Pacific Surfliner station cities and local elected officials
Rail Passenger Association of California and other transit/rail advocacy groups
Current and prospective rail passengers

Chapter 2: Historical Performance of the Pacific Surfliner Service

Overview

California is home to three of the most successful state-supported intercity passenger rail services operated by Amtrak. Combined, the Pacific Surfliner, Capitol Corridor, and the San Joaquin intercity passenger rail services carry more than 5.7 million passengers each year (See Figure 2.1). These three routes represent three of the five busiest state-supported rail services in the entire Amtrak national system: Pacific Surfliner at No. 1 with 2.95 million passengers per year, the Capitol Corridor at No. 2 with 1.71 million passengers per year, and the San Joaquin Corridor at No. 5 with 1.08 million passengers per year.¹ California's investment in intercity passenger rail service operations and capital projects over the past four decades has led the state to boast the highest Amtrak ridership of any state in the country, with the three state supported corridors being responsible for 18 percent of the ridership for the entire Amtrak national system.

History of Pacific Surfliner Service

From May 1971, when Amtrak assumed operation, through 2016, service between Los Angeles and San Diego increased from the original six daily trips to 24 daily Pacific Surfliner trips as detailed in Figure 2.2. Of the 24 daily Pacific Surfliner trains Amtrak currently operates, ten trains extend to Santa Barbara / Goleta and four continue to San Luis Obispo. The corridor is complimented by state-funded Amtrak Thruway buses, which provide scheduled connections to the Central Coast, Bay Area, Coachella Valley, and to the San Joaquin intercity rail corridor via Bakersfield. Two Amtrak long-distance trains (the Coast Starlight and Southwest Chief) also traverse portions of the LOSSAN rail corridor.

For the purposes of reporting performance, the Federal Fiscal Year (FFY) will be used, as this corresponds to Amtrak's reporting period.

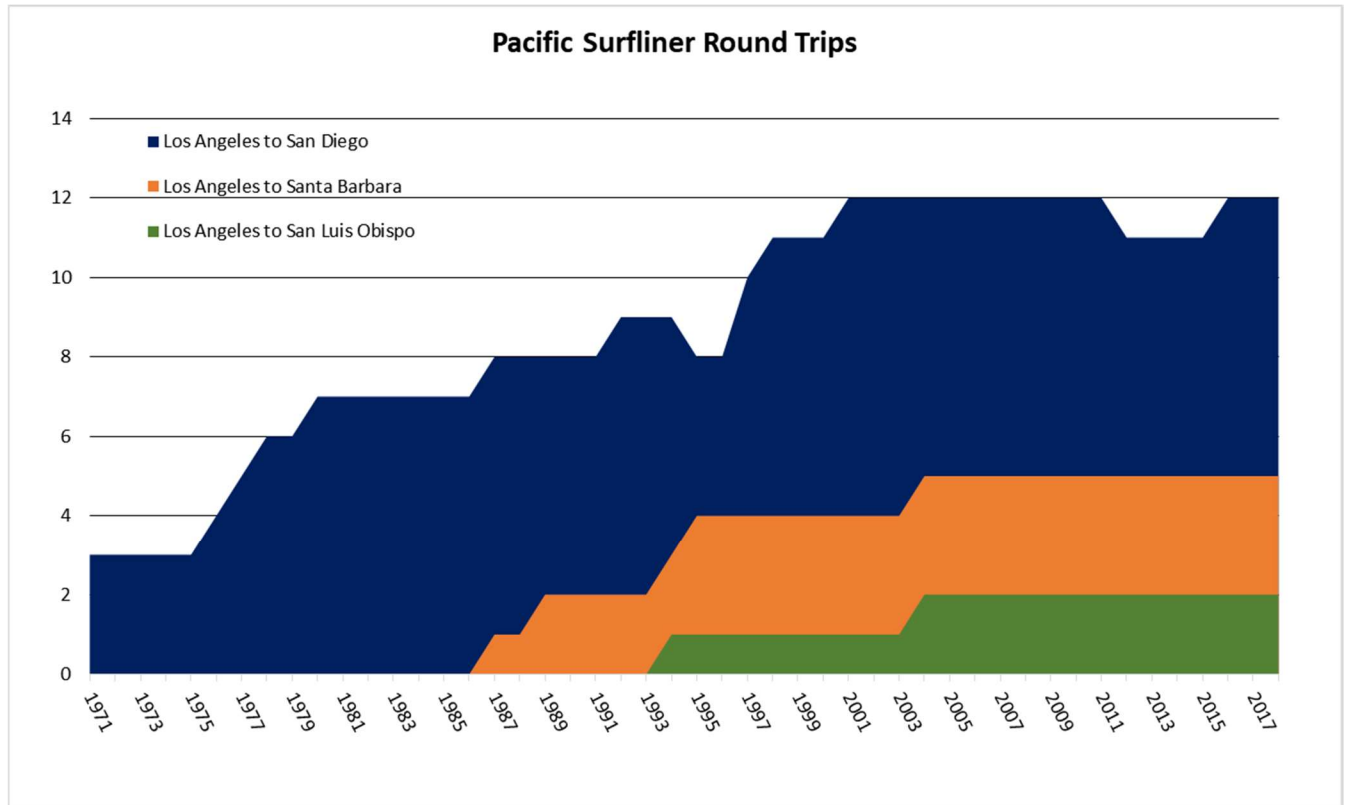
Figure 2.1: California Intercity Passenger Rail Routes



Source: Caltrans, 2015

¹ Amtrak Route Ridership and Gross Ticket Revenue, September 2018

Figure 2.2: Pacific Surfliner Service Growth



Source: LOSSAN Agency, 2018

Pacific Surfliner Funding

Table 2.1: Pacific Surfliner State Operating Subsidy

Fiscal Year	State Subsidy
2014	\$ 29,423,000
2015	\$ 36,819,000
2016	\$ 21,290,000
2017	\$ 21,644,000
2018	\$ 22,662,000
2019	\$ 26,443,000

As shown in Table 2.1, the annual operating subsidy for Pacific Surfliner service has remained relatively stable since FFY 2014-15, in part due to the transfer of Amtrak equipment lease costs from the operating agreement to a separate agreement between Amtrak and Caltrans, as well as LOSSAN Agency management actions to increase operating revenues. The subsidy rose in FFY 2018-19 due in part to the addition of morning peak-period service into Ventura and Santa Barbara counties.

Source: Amtrak, 2018

Historical Ridership and Revenue Performance

Table 2.2 shows annual ridership and financial performance data from FFY 1976-77 (when state-supported service began) through FFY 2017-18. Ridership and farebox recovery climbed steadily through the early 1990s with the farebox recovery ratio near or over 100 percent for six consecutive years, and ridership peaked at 1.8 million in FFY 1992-93.

Table 2.2: Pacific Surfliner Historic Performance

FY	Ridership	Revenue	Farebox Recovery	FY	Ridership	Revenue	Farebox Recovery
1977	607,976	\$ 598,140	36.0%	1998	1,624,693	\$ 15,194,498	33.9%
1978	753,246	\$ 1,446,036	38.4%	1999	1,563,275	\$ 16,401,625	40.6%
1979	967,316	\$ 2,203,403	50.8%	2000	1,567,318	\$ 17,883,725	47.7%
1980	1,218,196	\$ 3,341,561	60.4%	2001	1,661,704	\$ 20,430,153	53.5%
1981	1,238,135	\$ 4,032,480	61.4%	2002	1,742,768	\$ 20,922,453	53.1%
1982	1,167,718	\$ 4,097,254	62.0%	2003	2,030,491	\$ 22,247,564	52.6%
1983	1,131,146	\$ 4,094,750	59.1%	2004	2,307,010	\$ 24,559,183	54.2%
1984	1,221,256	\$ 4,842,400	76.4%	2005	2,454,396	\$ 26,660,048	55.4%
1985	1,240,003	\$ 5,410,502	84.4%	2006	2,655,490	\$ 31,604,715	56.9%
1986	1,394,320	\$ 5,658,915	88.1%	2007	2,685,194	\$ 34,753,372	59.5%
1987	1,461,003	\$ 6,072,523	93.3%	2008	2,835,132	\$ 37,266,009	61.7%
1988	1,661,512	\$ 8,223,462	104.6%	2009	2,696,951	\$ 34,857,678	56.6%
1989	1,717,539	\$ 11,458,084	108.5%	2010	2,614,777	\$ 35,822,186	53.5%
1990	1,746,673	\$ 12,189,942	103.2%	2011	2,746,320	\$ 38,739,760	56.0%
1991	1,791,781	\$ 13,306,307	99.6%	2012	2,664,935	\$ 42,884,431	57.6%
1992	1,673,107	\$ 13,152,063	99.3%	2013	2,689,465	\$ 64,446,130	61.7%
1993	1,810,572	\$ 13,692,612	103.3%	2014	2,673,170	\$ 69,013,726	67.1%
1994	1,699,882	\$ 12,725,094	90.8%	2015	2,827,134	\$ 75,836,869	70.5%
1995	1,464,577	\$ 11,805,859	73.5%	2016	2,924,117	\$ 79,465,847	78.8%
1996	1,480,674	\$ 13,553,553	56.5%	2017	2,989,871	\$ 83,016,156	79.2%
1997	1,617,641	\$ 14,804,355	37.4%	2018	2,946,239	\$ 86,319,147	77.3%

*FFY 2018 based on preliminary unaudited data

Source: Amtrak, 2018

ridership had recovered to pre-recession ridership levels, even though fewer train trips were operated than the prior years during which ridership peaked. FFY 2016-17 saw the reintroduction of the 12th roundtrip between Los Angeles and San Diego, and with it the highest annual ridership in the history of the service. Ridership in FFY 2017-18 declined by less than 2 percent. This was due in part to operational adjustments instituted to make the morning peak-period service into Ventura and Santa Barbara counties possible. Additional analysis on the ridership decrease is discussed in chapter four.

Since the early 2000s, ridership on the Pacific Surfliner service has increased significantly, offsetting the initial impacts of the introduction of commuter rail services. Ridership reached 2 million in FFY 2002-03, and farebox recovery has exceeded 50 percent since FFY 2000-01. Additionally, the introduction of the Rail 2 Rail program with Metrolink in September 2002, and in April 2008 with COASTER, was associated with another increase in ridership. Ridership peaked at nearly 3 million in FFY 2016-17, with farebox recovery exceeding 79 percent, continuing the overall trend of increase.

The Pacific Surfliner ridership declined each year between FFY 2007-08 and FFY 2009-10 as a result of the significant economic recession affecting the nation. During this time, Amtrak service was reduced. By FFY 2014-15, Pacific Surfliner

On-Time Performance

Table 2.3: Historical Pacific Surfliner Endpoint On-Time Performance

Fiscal Year	On-Time Performance
2014	77.60%
2015	78.00%
2016	78.00%
2017	68.80%
2018	77.10%

On-Time Performance (OTP) is an important measure of service quality and passenger satisfaction. For the Pacific Surfliner service, endpoint OTP is defined as arrival at the endpoint station within 10 minutes of scheduled arrival for trips up to 250 miles, and within 15 minutes of scheduled arrival for trips between 251 and 300 miles. Corridor-wide OTP is calculated by taking the total number of trains arriving on time at the end point of the run divided by the total number of trains operated on the route.

Source: Amtrak, 2018

The uniform intercity passenger rail performance standards released by CalSTA set a 90 percent endpoint OTP goal. Train delays are recorded by the conductor in minutes on a delay report form and categorized by specific cause. Additional details on OTP and efforts to achieve the 90 percent endpoint OTP goal are discussed in Chapter four.

Historical Pacific Surfliner endpoint OTP from FFY 2013-14 to FFY 2017-18 is summarized in Table 2.3.

Chapter 3: Operating Plan and Strategies

Existing Train Service and Planned Expansions

Currently, Amtrak operates 12 daily Pacific Surfliner roundtrips between San Diego and Los Angeles. Of those, five daily roundtrips (the 700-series trains) extend north of Los Angeles to serve Santa Barbara and Goleta, with two of those roundtrips extending further north to serve San Luis Obispo. Dedicated Amtrak Thruway bus connections supplement the train service on the LOSSAN rail corridor by providing transportation to and from Santa Barbara and San Luis Obispo and points north along the Central Coast to Oakland, as well as transportation between Fullerton and points east to the Coachella Valley.

The ability to expand Pacific Surfliner service is constrained due to both equipment availability as well as existing access and shared-use agreements with the host railroads on which the Pacific Surfliner operates. On the 351-mile LOSSAN rail corridor, the Pacific Surfliner operates over four host railroads that include UPRR, Metrolink, BNSF, and NCTD. Service expansion along the UPRR and BNSF is based on specific capital investments identified by the host railroad to allow for increased capacity. The extent of capital investment required to increase service, is a major reason why, over the past 20 years, only one new roundtrip has been added to the service. The largest capacity constraint to adding service has been the completion of a third main track along the BNSF between Los Angeles and Fullerton. This final capital improvement is scheduled to be complete in the fourth quarter of FY 2018-19. With the completion of this major capacity enhancement, additional roundtrips to increase the frequency of service between Los Angeles and San Diego are the near-term focus of service expansions for the Pacific Surfliner.

With the recent award of TIRCP grant funds in 2018 for the LOSSAN Agency's "Building UP" application, the necessary capacity enhancements can now be made north of Los Angeles on the UPRR as well, allowing for additional roundtrips to be extended north to Santa Barbara and San Luis Obispo in the near future.

Stations

The Pacific Surfliner services 27 stations (Figure 3.1), 17 of which are between San Luis Obispo and Los Angeles, with the remaining 10 located south of Los Angeles in Orange and San Diego counties (for station specific information, please refer to the "*LOSSAN Corridorwide Facilities, Equipment and Operations Inventory*"¹ report prepared April 2013). The Camarillo, Moorpark, and San Clemente Pier stations have limited service (not all trains stop at these stations).

¹ http://www.octa.net/pdf/publicationid_1748_15821.pdf

Figure 3.1: LOSSAN Rail Corridor and Pacific Surfliner Stations



Amtrak Thruway Bus Service and Transit Connections

Pacific Surfliner rail service is supplemented by Amtrak's network of Thruway buses that connect passengers throughout the LOSSAN rail corridor and beyond (Figure 3.2). Amtrak contracts with private bus operators to provide this service, including both operating staff and the vehicles. The bus routes function as part of the Pacific Surfliner service, with coordinated connections, guaranteed seating, integrated fares and ticketing procedures, and inclusion in Amtrak's central information and reservation system in the same manner as trains.

The Amtrak Thruway bus routes included in the Pacific Surfliner budget are summarized below:

- **Route 4:** Los Angeles to Santa Barbara/Goleta. One daily trip each direction.
- **Route 17:** Santa Barbara to San Luis Obispo to Oakland (where it connects with Capitol Corridor). Six daily trips in each direction.
- **Route 39:** Fullerton to Palm Springs and Coachella Valley. Two daily trips in each direction.

Figure 3.2: LOSSAN Managed Amtrak Thruway Routes



In addition, the LOSSAN Agency partners with local transit agencies to offer expanded options for transit connections throughout the LOSSAN Rail corridor. This includes coordinating with CalSTA to extend the Pacific Surfliner Transit Transfer Program by an additional year using existing TIRCP funding. The program, which was launched in July 2016, provides free connections between the Pacific Surfliner and 11 local transit services from San Luis Obispo to San Diego. The LOSSAN Agency also continues to sell both Metro TAP and San Diego MTS Compass cards on each train, making it easier for passengers to connect to the local bus and rail systems in Los Angeles or San Diego.

Additionally, there are Amtrak Thruway bus routes managed by the CCJPA and SJJPA that provide connectivity between the Pacific Surfliner and the Capitol Corridor and San Joaquin services.

FY 2018-19 Operating Plan and Accomplishments

The LOSSAN Agency's operating plan for FY 2018-19 was initially based on the November 7, 2016 timetable, adjusted further for the October 9, 2017 timetable, with additional modifications implemented on April 1, 2018. For the April 1, 2018 schedule change, the LOSSAN Agency implemented peak-period service from Los Angeles to Ventura and Santa Barbara counties. The LOSSAN Agency coordinated with Amtrak, Metrolink, SBCAG, CalSTA, and UPRR to implement a schedule that created a new early-morning, northbound train (Train 759) between Los Angeles and Goleta that, when combined with existing southbound Pacific Surfliner service (Train 792), allows passengers to utilize the Pacific Surfliner to travel from their homes in Ventura County to work in Santa Barbara County. The current Operating Plan² for FY 2018-19 is as follows:

- San Diego – Los Angeles: 24 daily trains
- Los Angeles – Goleta: 10 daily trains
- Goleta – San Luis Obispo: 4 daily trains

The LOSSAN Agency continued coordination efforts with all freight and passenger rail operators along the LOSSAN rail corridor through joint scheduling meetings and absolute work window planning meetings to improve connectivity and customer service, and minimize passenger inconvenience.

FY 2019-20 and FY 2020-21 Operating Plan

In FY 2018-19 and 2019-20, the LOSSAN Agency will continue to work cooperatively with Caltrans DRMT to ensure sufficient state funding is provided to operate the existing Pacific Surfliner and Amtrak Thruway bus services, while also exploring opportunities to enhance ridership, revenue, and OTP.

While overall corridor OTP is improving, the Pacific Surfliner service remains under its OTP goal of 90 percent. The LOSSAN Agency will continue to work with Amtrak and host railroads to evaluate and pursue additional cost-effective opportunities for improving OTP on the

² Some weekend train schedules differ from weekday schedules.

Pacific Surfliner service. Additional details on the efforts currently being undertaken to improve OTP are included in Chapter 4. In addition to this ongoing analysis and coordination, the LOSSAN Agency was successful in securing TIRCP funds to implement capitalized access and incentive agreements with some host railroads. An agreement was executed with NCTD in January 2019 and a similar agreement is being negotiated with UPRR. These agreements will allow for financial incentives to the host railroads for improved OTP.

In FY 2019-20 and FY 2020-21, the LOSSAN Agency and Amtrak anticipate introducing new service on the LOSSAN rail corridor (Table 3.1). A new roundtrip between San Diego and Los Angeles is planned, following the completion of the third main track along the BNSF between Los Angeles and Fullerton, which is anticipated for the 4th quarter of FY 2018-19. New service north of Los Angeles is also planned, contingent on securing the necessary agreements with UPRR. A second new roundtrip between Los Angeles and San Diego is also planned by FY 2020-21.

Table 3.1: Planned Pacific Surfliner Service Levels

Route Segments	FY 2019-20	FY 2020-21
San Diego – Los Angeles	26 trains*	28 trains*
Los Angeles – Santa Barbara/Goleta	12 trains**	12 trains**
Los Angeles – Santa Barbara – San Luis Obispo	6 trains**	6 trains**

* Service dependent on third main track completion on BNSF between Los Angeles and Fullerton and equipment availability

** Service dependent on approval from UPRR and equipment availability

In addition, the LOSSAN Agency will continue to coordinate, improve and expand on already successful seasonal and special event services, including the Del Mar Races, Oxnard Strawberry Festival, San Diego Comic-Con International, and sporting events along the Pacific Surfliner route. The LOSSAN Agency will also work with its member agencies and host railroads to help identify opportunities to extend special services to events such as the Coachella Valley Music Festival.

To enhance the existing Pacific Surfliner service, the LOSSAN Agency remains committed to working with Caltrans DRMT, SJJPA, Metrolink, NCTD, Amtrak, and regional and local transit providers to improve transit and rail connections to the Pacific Surfliner. To help achieve this, the LOSSAN Agency will be looking into integrated ticketing concepts in collaboration with Caltrans DRMT, NCTD, and Metrolink to create a user friendly and standard interface for passengers to purchase tickets and transfer between services along the LOSSAN rail corridor. The LOSSAN Agency will continue to utilize its member agencies to assist in coordinating improved communications and connectivity with local transit operators, and to help establish timed connections between Pacific Surfliner trains and connecting transit services for the first and last mile connections.

The LOSSAN Agency will also work with local transit agencies to explore opportunities to enhance transit connections from Pacific Surfliner stations to local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport. The Pacific Surfliner already directly serves the Hollywood Burbank Airport.

No changes are currently planned to Amtrak Thruway bus service during this period. However, LOSSAN Agency staff will continue to carefully review schedules as well as ridership and revenue data for the three routes under its control and propose changes to help make the service more effective, as appropriate.

Service Optimization

Though it already has the distinction of being the second-busiest intercity passenger rail corridor in the United States, the Pacific Surfliner service has great potential for increased ridership, revenue, better service coordination, and improved performance. In early 2019, the LOSSAN Agency initiated a service optimization study for the entire corridor. The intent of this analysis is to coordinate with host railroads to establish a two- and five-year strategy to optimize service in the corridor. This strategy includes adding up to three new roundtrips for the Pacific Surfliner and implementing some of the early infrastructure and service objectives outlined in Metrolink's Southern California Optimized Rail Expansion (SCORE) program.

The service optimization study will define operating plans that align with the overall goals of the 2018 California State Rail Plan to increase frequency and reliability for services operating along the LOSSAN rail corridor. This optimization study will be further enhanced through the coordination the LOSSAN Agency will continue to perform related to identifying and evaluating root causes for major delays, crew and equipment utilization, and improvements to service disruption responses and recovery.

Chapter 4: Performance Standards and Metrics

Background

The LOSSAN Agency strives for continuous improvement of the Pacific Surfliner passenger rail service. Pursuant to SB 1225, the Secretary of CalSTA was required to establish a set of uniform performance standards (UPS) for the state's three intercity passenger rail corridors to control cost and improve efficiency. These standards measure the ongoing success of the service in three specific areas: **usage** (ridership and passenger miles), **efficiency** (farebox recovery and cost per passenger mile), and **service quality** (endpoint/all station on-time performance and operator caused delays). These standards also provide the basis for service changes, and help guide the planning efforts for the LOSSAN Agency. The performance standards are summarized in Table 4.1.


Table 4.1: Uniform Performance Standards

Performance Standard	Category	Measurement
Passenger Miles	Usage	Ongoing growth in passenger miles* traveled on state-funded bus and rail services relative to baseline
Ridership	Usage	Growth in ridership relative to baseline, on both bus and rail
Farebox Recovery	Cost efficiency	55 percent, inclusive of Amtrak Thruway bus routes
Cost per Passenger Mile	Cost efficiency	Continuous improvement
Endpoint OTP	Service quality	90 percent of endpoint station arrivals within 15 minutes of schedule for trips over 251 miles and within 10 minutes for trips up to 250 miles, calculated quarterly
All-Station OTP	Service quality	90 percent of arrival at all station stops within 15 minutes of schedule, calculated quarterly
Operator Responsible Delays per 10,000 Train Miles	Service quality	Fewer than 325 minutes of delay per 10,000 train miles

* One passenger traveling one mile = one passenger mile

For reporting performance metrics, the federal fiscal year (FFY) will be used, as this is the standard for Amtrak reporting. This chapter presents the performance of the Pacific Surfliner against the established UPS for FFY 2017-18. Along with each standard will be a colored directional indicator, demonstrating both whether the standard is being met (red: standard not met; green: standard met or exceeded) and the direction of the current performance trend. Financial data presented for FFY 2017-18 is preliminary and unaudited.

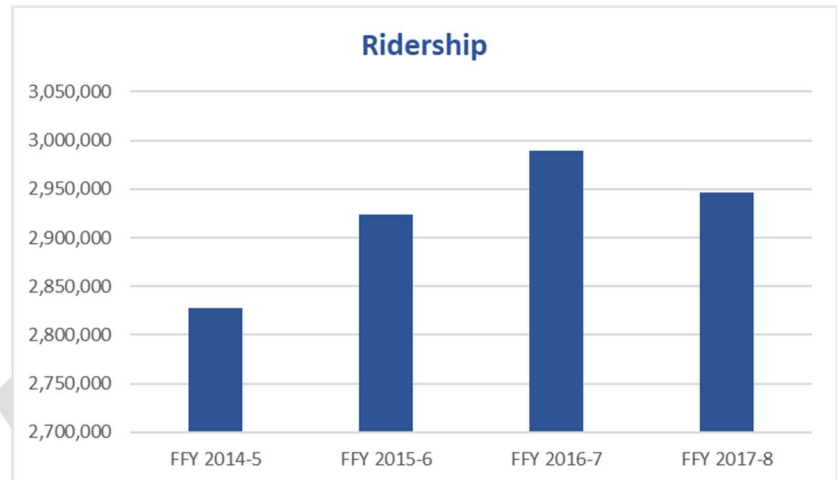
Usage

Performance Standard	Metric	Status
Ridership	Continuous growth relative to baseline	

Total ridership on the Pacific Surfliner for FFY 2017-18 was 2,946,239¹, a **1.5 percent decrease** over the prior year. This marks the first time since the LOSSAN Agency assumed management responsibility for the Pacific Surfliner intercity passenger rail service that the service has experienced a year over year ridership decline.

This ridership decline was anticipated and is partly a result of the implementation of peak-period service between Los Angeles County and Ventura and Santa Barbara counties. This service was implemented on April 1, 2018, and since that time, monthly ridership has declined an average of 6.2 percent (through October 2018). A detailed analysis was undertaken to determine the root cause of the decline in overall ridership. One of the more significant findings was the impact of the bifurcation of Train 761, which was necessary to facilitate the new peak-period service.

Figure 4.1: Pacific Surfliner Corridor Ridership



Train 761 averaged daily ridership in excess of 420 passengers and was, by percentage, one of the most heavily utilized trains for Metrolink R2R passengers. On average, of the 420 daily passengers, 200 were R2R riders. Ridership and station pair patterns suggest that Train 761 was popular with morning commuters primarily due to the fact that it allowed R2R riders to take a one-seat ride from Orange County through Los Angeles and into Ventura County. Train 561 (formerly 761) now terminates in Los Angeles, and averages fewer than 200 daily riders, with daily R2R riders averaging fewer than 90 per day. Even factoring in the additional ridership associated with the new peak-period service does not offset the decrease seen by bifurcating former Train 761.

The ridership decreases seen during FFY 2017-18 were also contributed to by the significant track closures that occurred during the fiscal year. There were a number of weekend work windows that were necessary to accommodate construction of capital improvements in San Diego County. The weekend track closures required the cancellation of multiple Pacific Surfliner trains each weekend, with the remaining trains terminating at Irvine or Oceanside, with bus bridge service provided south to San Diego. Additionally, storms and other weather related issues closed portions of the track and imposed speed restrictions on others.

¹ Source: Amtrak, 2018

In an effort to recapture ridership, the LOSSAN Agency is working with Metrolink to improve the connections between northbound trains in Los Angeles to ensure a well-timed connection for ease of transfer to points north of Los Angeles. Effort is also being put towards additional train slots to allow for the restoration of Train 761 on weekdays.

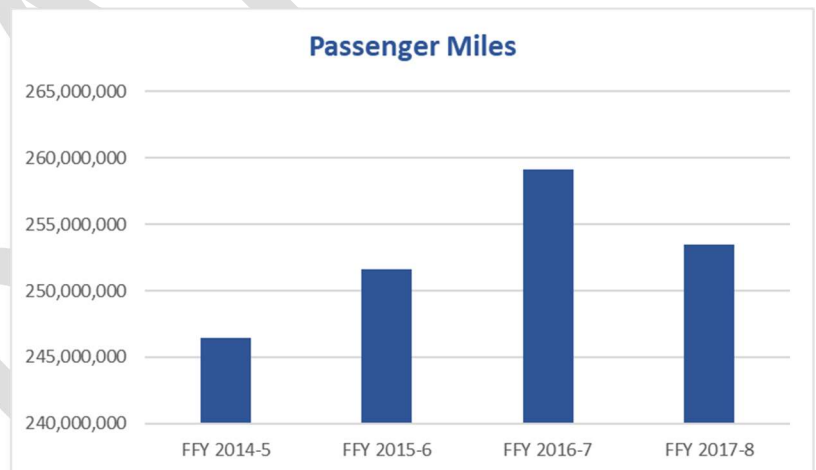
Despite this ridership decrease, the Pacific Surfliner remains the second-busiest Amtrak rail corridor in the nation (surpassed only by the Northeast Corridor between Boston, New York, and Washington, D.C.), and the busiest state-supported service in the entire Amtrak national system. The Pacific Surfliner accounts for nearly 20 percent of the total ridership of all state supported corridors, and nearly 10 percent of the total ridership for the entire Amtrak nation system.

Performance Standard	Metric	Status
Passenger Miles	Continuous growth relative to baseline	

Pacific Surfliner passenger miles totaled 253,461,239 for FFY 2017-18, a **decrease of 2.2 percent** over the prior year, which is on par with the overall decrease in system ridership experienced during the same time period.

Factoring in the average pounds of carbon dioxide emissions per passenger mile in a private automobile versus riding on passenger rail², the 253 million passenger miles for the Pacific Surfliner resulted in a **reduction of over 91,000 tons of greenhouse gases (GHG)**. The impact that this has on the environment cannot be understated. The CO₂ emissions saved is the equivalent of burning over 191,000 barrels of oil.


Figure 4.2: Pacific Surfliner Corridor Passenger Miles



It is expected that passenger miles will recover in FFY 2019-20 as the LOSSAN Agency plans and implements future service expansion. Service expansion opportunities include not only regularly scheduled trains, but also special event trains. The LOSSAN Agency and Amtrak have partnered to provide additional capacity to trains serving major events, including the Del Mar Races, Oxnard Strawberry Festival, and the annual San Diego Comic-Con International. The LOSSAN Agency plans to build on the success of that special event service and look for opportunities to promote the Pacific Surfliner as the travel mode of choice to major events.

² Source: *Public Transportation's Role in Responding to Climate Change*, Federal Transit Administration, 2010. <https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/PublicTransportationsRoleInRespondingToClimateChange2010.pdf>

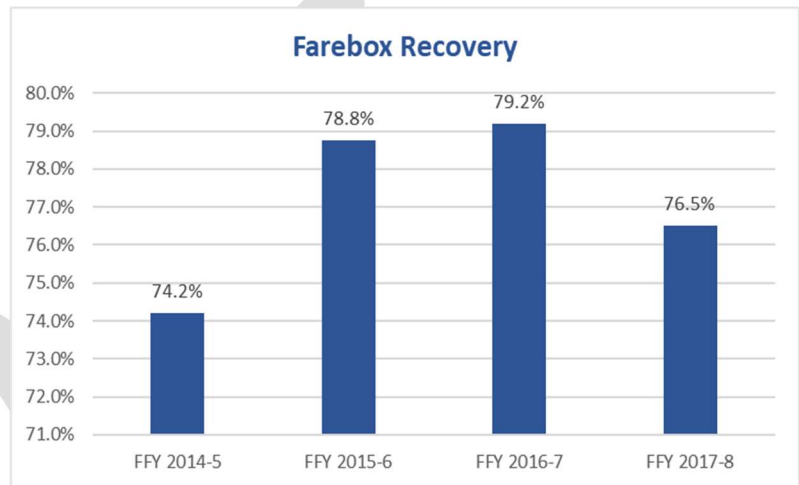
Efficiency


Performance Standard	Metric	Status
Farebox Recovery	Minimum 55 percent	

The FFY 2017-18 farebox recovery rate of **76.5 percent** represents a decline of **3.4 percent** over the prior year. Despite this decline, the farebox recovery rate still far exceeds the mandated 55 percent.

Farebox recovery was also impacted by the implementation of peak-period service between Los Angeles County and Ventura and Santa Barbara counties. In this case, the additional costs associated with implementing the new service are not being offset by an increase in ridership, and thus an increase in ticket revenue. This resulted in a small decrease to the farebox recovery for FFY 2017-18. However, as efforts to recover ridership continue, it is expected that farebox recovery will resume an upward trend in FFY 2019-20.

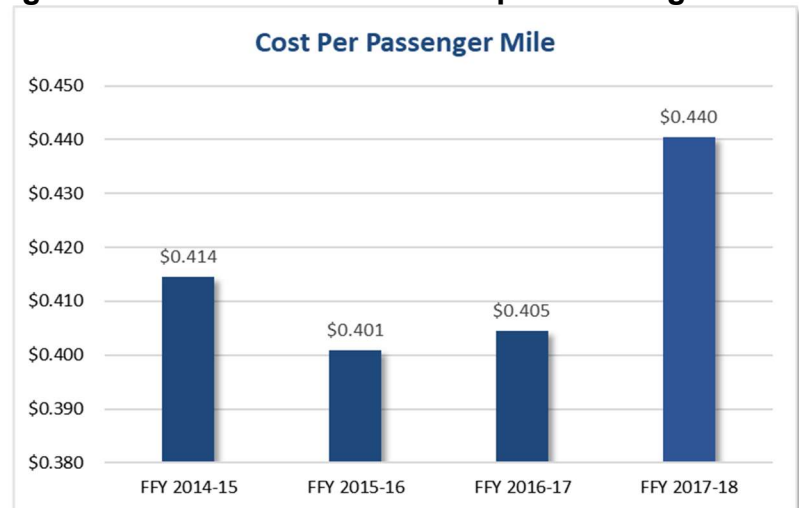
Figure 4.3: Pacific Surfliner Farebox Recovery





Performance Standard	Metric	Status
Cost/Passenger Mile	Continuous improvement	

Cost per passenger mile for FFY 2017-18 was **\$0.440**. This was an increase of 3.5 cents over the prior year. This increase can be attributed in large part to the implementation of additional peak period service. The increase in cost per passenger mile is expected to continue in FFY 2019-20 with the planned implementation of the 13th round trip.

Figure 4.4: Pacific Surfliner Cost per Passenger Mile



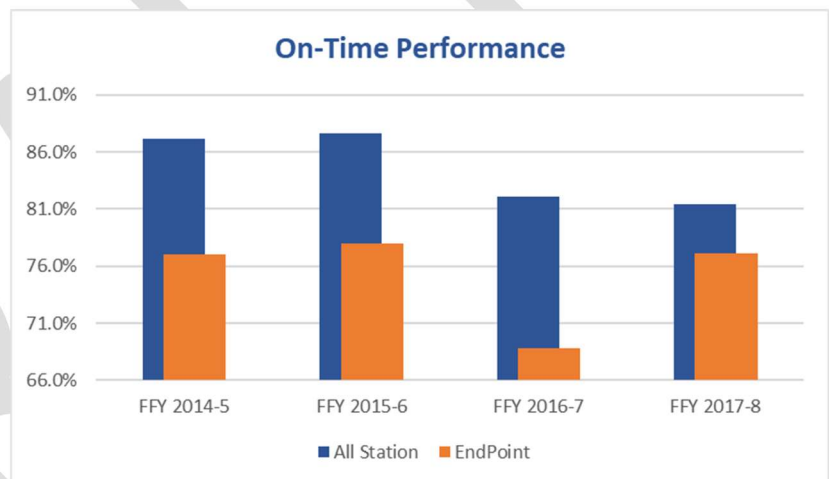
Service Quality

Performance Standard	Metric	Status
Endpoint On-Time Performance	90 percent of endpoint arrivals within 10 minutes (up to 250 miles) or 15 minutes (over 251 miles) of schedule	
All-Station On-Time Performance	90 percent of arrival at all station stops within 15 minutes of schedule	

The FFY 2017-18 endpoint OTP was **77.1 percent**, a 12.1% improvement over the prior year, whereas the all-station OTP was **81.4 percent**, which was slightly lower than FFY 2016-17.


OTP continues to be an area that does not meet the UPS. The LOSSAN Agency has been working with Amtrak to collate and classify the root causes for delay via daily OTP reports. In October 2017 and again in April 2018, the LOSSAN Agency worked with rail owners and operators and Caltrans DRMT to implement schedule changes to improve the overall reliability of the Pacific Surfliner passenger rail. These changes continue to result in a positive OTP trend.

Figure 4.5: Pacific Surfliner On-Time Performance



However, as OTP continues to be a metric that does not meet the standard, LOSSAN Agency efforts are ongoing in this regard. A significant portion of the identified issues related to OTP were a direct result of host railroad delays and dispatching issues. On January 30, 2019, the LOSSAN Agency executed an agreement with NCTD for an OTP incentive program. Funded via a 2018 TIRCP grant, this program will provide incentive performance payments for meeting Pacific Surfliner OTP goals. A similar program will be developed with the UPRR.

In addition, the number of mechanical issues related to locomotive failure should decrease as the new Charger locomotives are deployed, helping to further improve OTP. The LOSSAN Agency continues ongoing effort to identify the causes of delay and work with Amtrak and the host railroads to find appropriate solutions.

Performance Standard	Metric	Status
Operator Delays/10,000 Train Miles	Fewer than 325 minutes of delay per 10,000 train miles	

For FFY 2017-18, the Pacific Surfliner averaged 586 minutes of operator delays per 10,000 train miles. This is an improvement over the prior year, and yet continues to be an area wherein the Pacific Surfliner service does not meet the UPS. Many of the issues associated with operator delays are being improved by the recent schedule changes that are currently causing a rise in OTP. However, the LOSSAN Agency will continue to work with Amtrak and our host railroads to ensure that this performance standard continues to improve.

Additional Performance Indicators

There are additional performance indicators that, while not required to be reported to the state, are helpful in calculating the value and efficiency of the service. These indicators are included below.

Revenue

A strong indicator of the health of the service is total revenue, which exceeded **\$79.9 million** for FFY 2017-18, a **5.7 percent increase** over the prior year.

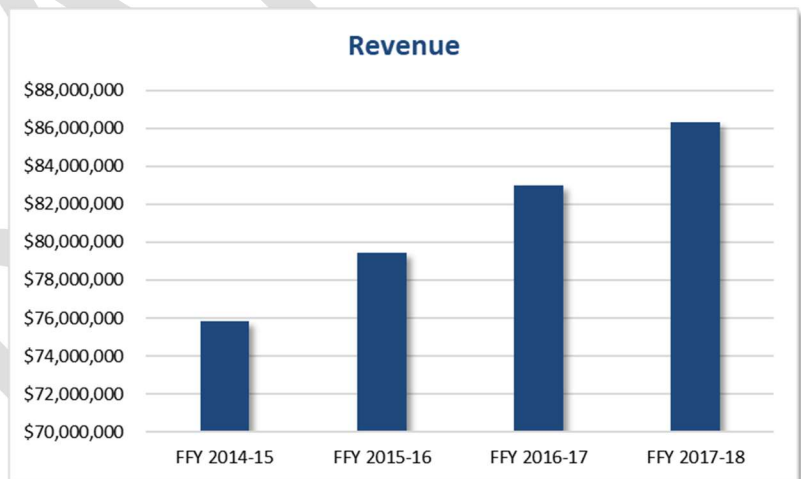
This increase is in spite of the overall decrease in ridership, and can be attributed to both the Pacific Surfliner fare restructuring that took place in March 2018, as well as expanded business class service instituted in 2017. The LOSSAN Agency continues to

seek ways to maximize revenue from the existing service. As part of that effort, LOSSAN Agency staff continually works with Amtrak to evaluate existing food and beverage service based on sales and revenue data, and implement menu refreshes to update the food and beverage selections being offered aboard Pacific Surfliner Café cars. Revenue in FFY 2019-20 is expected to continue to be strong with the planned implementation of the 13th round.

Customer Service

For the Pacific Surfliner, Amtrak reports monthly customer service scores in which an 'average overall satisfied' percentage is calculated out of 100 passengers surveyed. The Pacific Surfliner scored an average **83.9 percent** for FFY 2017-18. This was on par with the Amtrak nationwide average of 83.4 percent for the same period.

Figure 4.6: Pacific Surfliner Revenue



FY 2019-20 and FY 2020-21 Action Plan

The LOSSAN Agency will continue to monitor system performance on a monthly basis and report to the Board via the quarterly LOSSAN rail corridor trends report. As OTP continues to be an area of concern, LOSSAN Agency staff will continue to work with the NCTD and UPRR to implement OTP incentive programs. The LOSSAN Agency will continue to develop and implement schedule adjustments as problem areas are identified. Dispatch policies and operating parameters will continue to be refined through the Corridor Improvement Team, which includes all rail operators and host railroads.

Modification of Performance Standards

The UPS document identifies a number of factors that may lead to the need to modify the adopted UPS. Currently, no basis for modifications of the standards exist. As more historical data is gathered, the UPS may be revisited to establish standards that better capture the performance of the service.

Chapter 5: Capital Improvement Program

Since 1990, the state of California has made a significant investment to fund capital improvements on the state's three intercity passenger rail corridors. During that time, LOSSAN member agencies have also been successful in securing state and federal grants for preliminary engineering, environmental documentation, final design, and construction of capital projects along the LOSSAN rail corridor, in addition to local investments by self-help counties using countywide sales-tax measures. These improvements have allowed for significant enhancements in safety, improvements in operational efficiency, and increased capacity. Despite these investments, nearly two-thirds of the rail corridor remains single track, most of which is along the corridor north of Los Angeles. This remaining single track will continue to hinder the expansion of service and overall efficiency. An extensive capital improvement program of over \$5 billion in additional capacity, station improvements, signal and communications improvements, and other capital projects remains unfunded.

There are seven different ROW owners along the LOSSAN rail corridor and each has made investments within their territory; however, the capital needs of the corridor well outweigh the available funding resources. A significant hurdle for the intercity passenger rail services in California has been the lack of a long-term sustainable capital funding source. However, the approval of Senate Bill (SB) 1 by the California legislature in April 2017 has helped provide a more reliable funding source for these major (and minor) capital needs, but is still insufficient by itself to fully fund the identified capital improvements along the LOSSAN rail corridor. The LOSSAN Agency will continue to coordinate with its partners and member agencies to pursue additional funding opportunities that bring benefits to the larger corridor.

The LOSSAN Agency is actively working to update its Capital Improvement Plan (Plan) for the LOSSAN rail the corridor. The goal of this effort is to review the capital programs included in the LOSSAN Agency, State, and stakeholder planning documents to compile a comprehensive list of all identified capital projects whether larger or small. This will include the current status of each project as well as any programmed funding. Based on this comprehensive list of projects, a prioritized project list will be developed from the work performed as part of the corridor optimization study that will begin in early 2019. This list will quantify the capacity improvements, time savings, and other measurable benefits of each capital project. A strategy will be developed that links the various projects for delivery consistent with the service expansion plans of Metrolink and NCTD, including the planned 13th, 14th, and 15th round trips for the Pacific Surfliner.

While each member agency or host railroad is responsible for the implementation of their respective capital improvement programs, the LOSSAN Agency will use the updated Plan in both funding and legislative pursuits, with a focus on leveraging any existing funds to advance capital projects that benefit the entire LOSSAN rail corridor. This unified voice advocating for capital funding and key projects makes the LOSSAN Agency's requests more compelling and competitive.

It is also important to note that the Class 1 freight railroads own approximately 55 percent of the ROW over which the Pacific Surfliner operates. The UPRR owns 174 miles, and BNSF owns 21 miles. This ownership makes them vested and necessary partners in many of the projects benefitting the corridor. The relationship with these railroads is key to the continued successful

operation of the service, and the LOSSAN Agency continues to coordinate capital improvement efforts with these partners.

Capital Improvement Program Funding

As part of the ongoing capital improvement program (CIP), the LOSSAN Agency continues to both pursue and administer various funding programs available for the improvement of the facilities throughout the LOSSAN rail corridor. Below are the programs currently being utilized as part of this effort.

State Rail Assistance Program: SB 1 includes approximately \$440 million directed specifically to commuter and intercity rail services through the State Rail Assistance (SRA) program. The SRA is intended to fund both operational and capital improvements through a combination of formula and competitive distribution. The SRA was created to provide intercity rail agencies with a dependable source of supplemental revenue that is flexible and can be used to fund a variety of rail service improvements. The SRA program formula distribution process begins with state FY 2017-18, and the LOSSAN Agency has been allocated the first two years of available SRA funds (\$8.3 million) to projects identified in the LOSSAN Agency CIP. Future year allocation estimates will be updated annually and will fluctuate somewhat with the current price of diesel fuel.

CalSTA TIRCP: The 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 GHG emissions and vehicle miles travelled. In April 2016, the LOSSAN Agency submitted a \$150 million TIRCP grant application titled: "All Aboard: Transforming Southern California Rail Travel" in partnership with SANDAG, NCTD and OCTA. In total, CalSTA awarded \$82 million in TIRCP grant funds to the LOSSAN Agency, representing the single largest award to any agency. The grant award included funding to advance work on a number of high-priority capital improvements on the LOSSAN rail corridor.

On January 12, 2018, the LOSSAN Agency coordinated the submittal of three separate applications requesting over \$700 million in capital and operational improvement project funding as part of the 2018 call for projects. These applications were divided between the north and south portion of the LOSSAN Corridor, with the third application focusing on special event service to the Coachella Valley Music and Arts Festival. The LOSSAN Agency was awarded \$188.3 million in TIRCP funds, including \$147.9 million for projects in Ventura, Santa Barbara, and San Luis Obispo counties, and \$40.4 million for projects in San Diego county.

California Office of Emergency Services (CalOES) – California Transit Security Grant Program (CTSGP): The Highway Safety, Traffic Reduction, Air Quality, and Port Security Bond Act of 2006, approved by the voters as Proposition 1B (Prop 1B) in November 2006, authorized the issuance of \$19.9 billion in general obligation bonds for specified purposes, including grants for transit system safety, security, and disaster response projects. An element of Prop 1B is the CTSGP – Intercity Passenger Rail/Commuter Rail Systems administered by CalOES.

The CTSGP provides funding for capital projects that enhance protection against safety and security threats on select intercity passenger and commuter rail systems in California. Projects eligible for CTSGP funding are those designed to enhance the safety and security of stations,

tunnels, or other facilities and equipment; the installation of explosive, chemical, biological, and radiological device mitigation/remediation equipment, and the installation of physical security enhancements.

Caltrans DRMT has been a recipient of CTSGP funds in prior years and has implemented projects along the LOSSAN rail corridor. Past projects have included the installation of video security equipment at various stations, improvement and replacement of platform lighting, and the installation of new crossing barriers and swing gates.

The LOSSAN Agency is an eligible recipient of these grant funds, and has so far been allocated nearly \$7.2 million in CTSGP funds, for FY 2013-14 through FY 2016-17. These grants funds were allocated to projects for a corridor-wide video surveillance system replacement/upgrades, the construction of a centralized monitoring center for these video feeds, and physical security improvements including the construction of a new law enforcement office at the San Diego Santa Fe Depot.

State Minor Capital Project Funding: In addition to the major capital improvements funded by various sources as discussed above, the state annually sets aside an allocation of approximately \$500,000 to cover minor projects related to the Pacific Surfliner service. Projects funded under this program include station improvements, signage, and minor safety and security enhancements.

The LOSSAN Agency has worked with member agencies and station owners to prepare a prioritized list of candidate projects for this state-funded program. As part of that effort, the LOSSAN Agency has worked to maximize the funding available for customer service-focused improvements that enhance the passenger experience by utilizing other sources of funds to fill the immediate safety and security needs.

On January 30, 2019, the LOSSAN Board approved a comprehensive CIP that will utilize the available project funding for the next two years. The approved CIP focuses on projects that address immediate safety and/or security needs, and includes some projects that improve the passenger experience. The LOSSAN Board also directed staff to continue to work with the TAC to identify projects that will utilize future available project funding.

Other Capital Funding: In addition to the funding sources discussed above, the LOSSAN Agency and its member agencies have and will continue to utilize a variety of other federal, state and local funding sources to advance capital improvements and other programs along the LOSSAN rail corridor, including the American Recovery and Reinvestment Act of 2009, the Transportation Investment Generating Economic Recovery program, PRIIA grants, Consolidated Rail Infrastructure and Safety Improvement (CRISI) grants and local transportation sales-tax measures.

The 2018 California State Rail Plan (2018 Plan), which is adopted every five years, lays out a transformative long-term vision of the state-wide railroad network. The 2018 Plan envisions capital investments along a strategic trajectory toward a layered, multi-tiered freight and passenger rail operating environment that better serves travel markets and delivers better cost

efficiency metrics than the bifurcated services do today. The current planning efforts that the LOSSAN Agency is engaged in with the passenger and freight rail operators in Southern California, are already being coordinated within the larger context of the 2018 Plan. Future LOSSAN Agency Business Plans will have an obligation to be developed in accordance to the 2018 State Rail Plan objectives.

Current and Programmed Capital Projects

The LOSSAN Agency has an approved CIP that have been programmed using SRA, State Minor Capital Project and TIRCP funding sources. This list is supplemented by additional capital projects along the rail corridor that have been programmed by our member agencies. A summary of the LOSSAN Agency programmed projects are listed in Table 5.1, including programmed funding sources and estimated costs. A list of programmed member or partner agency led capital projects along the LOSSAN corridor that are in progress or will begin construction prior to FY 2020-21 is provided in Table 5.2.

Table 5.1: Programmed LOSSAN Agency Capital Projects

Operator / Subdivision	Station or Mileposts	Project Description	Estimated Cost	Funding Source
UPRR / Santa Barbara	San Luis Obispo	Central Coast Layover Facility Expansion	\$12,500,000	STIP
UPRR / Santa Barbara	San Luis Obispo	Painting exterior of building and repair wood damage on shelter base	\$312,455	SRA / Minor Capital
UPRR / Santa Barbara	San Luis Obispo	Painting ticket counter and office area	\$7,643	SRA / Minor Capital
UPRR / Santa Barbara	San Luis Obispo	Concrete arm rest for existing bench (6)	\$8,174	SRA / Minor Capital
UPRR / Santa Barbara	San Luis Obispo	3 new benches for platform	\$7,562	SRA / Minor Capital
UPRR / Santa Barbara	San Luis Obispo	New flooring for ticket office	\$3,822	SRA / Minor Capital
UPRR / Santa Barbara	Grover Beach	New platform tactile and striping and repaint handrail	\$289,930	SRA / Minor Capital
UPRR / Santa Barbara	Grover Beach	New platform and parking lot LED upgrade (46)	\$119,400	SRA / Minor Capital
UPRR / Santa Barbara	Guadalupe	New platform tactile and striping	\$188,075	SRA / Minor Capital
UPRR / Santa Barbara	Guadalupe	Paint interior and exterior of shelter canopy	\$16,792	SRA / Minor Capital
UPRR / Santa Barbara	Guadalupe	Provide and install arm rest for existing benches (Concrete swale 8)	\$9,244	SRA / Minor Capital
UPRR / Santa Barbara	Surf	New platform, parking lot and canopy fixture upgrade 32 fixtures total	\$113,146	SRA / Minor Capital
UPRR / Santa Barbara	Surf	Paint, restriped platform tactile, repair expansion joint, clean and polish handrails on platform	\$33,817	SRA / Minor Capital
UPRR / Santa Barbara	MP 355.7 – MP 251.5	Install Centralized Traffic Control	\$30,000,000	TIRCP
UPRR / Santa Barbara	MP 355.7 – MP 251.5	Upgrade of non-powered switches and sidings	\$26,800,000	TIRCP
UPRR / Santa Barbara	Goleta	Goleta layover facility expansion	\$10,222,000	TIRCP / SRA / Other
UPRR / Santa Barbara	Goleta	New platform tactile	\$132,093	SRA / Minor Capital
UPRR / Santa Barbara	Goleta	Crew room rehab (paint, flooring, bathroom, ceiling tile)	\$76,435	SRA / Minor Capital
UPRR / Santa Barbara	Goleta	Restripe platform	\$21,413	SRA / Minor Capital
UPRR / Santa Barbara	Goleta	10 swale for concrete benches	\$8,327	SRA / Minor Capital
UPRR / Santa Barbara	Goleta	Canopy repair and canopy lighting upgrade (6)	\$5,269	SRA / Minor Capital
UPRR / Santa Barbara	Goleta	Design of expanded layover facility	\$260,000	SRA / Minor Capital
UPRR / Santa Barbara	Santa Barbara	Microphone in baggage room	\$2,293	SRA / Minor Capital
UPRR / Santa Barbara	Carpinteria	Carpinteria station double track and second platform	\$31,938,000	TIRCP / SRA

Table 5.1: Programmed LOSSAN Agency Capital Projects (continued)

Operator / Subdivision	Station or Mileposts	Project Description	Estimated Cost	Funding Source
UPRR / Santa Barbara	Carpinteria	New tactile and striping	\$100,928	SRA / Minor Capital
UPRR / Santa Barbara	Carpinteria	Paint and restriped platform	\$18,298	SRA / Minor Capital
UPRR / Santa Barbara	Carpinteria	6 benches	\$13,066	SRA / Minor Capital
UPRR / Santa Barbara	MP 385.6 – MP 368.58	Construction of passing siding	\$26,000,000	TIRCP / SRA
UPRR / Santa Barbara	Oxnard	New tactile and striping	\$157,525	SRA / Minor Capital
UPRR / Santa Barbara	Oxnard	Platform striping	\$31,141	SRA / Minor Capital
UPRR / Santa Barbara	Oxnard	5 new benches with arm rest	\$11,384	SRA / Minor Capital
UPRR / Santa Barbara	Oxnard	Flooring for ticket area and office	\$3,822	SRA / Minor Capital
UPRR / Santa Barbara	Oxnard	New ceiling panel	\$3,057	SRA / Minor Capital
UPRR / Santa Barbara	Oxnard	New exhaust for bathroom	\$1,529	SRA / Minor Capital
UPRR / Santa Barbara	MP 421.44 – MP 405.49	Passing siding extension / construction	\$24,527,346	TIRCP / Prop 1B / SRA
UPRR / Santa Barbara	Camarillo	Camarillo Station Pedestrian Grade Separated Crossing	\$7,800,000	TIRCP / Prop 1B / TDA
UPRR / Santa Barbara	Simi Valley	Tactile and striping	\$126,928	SRA / Minor Capital
SCRRA / Ventura	Chatsworth	Tactile and striping for both platform	\$154,166	SRA / Minor Capital
SCRRA / Ventura	Chatsworth	Furnish and install 4 benches for platform	\$9,855	SRA / Minor Capital
SCRRA / Ventura	Van Nuys	Flooring behind ticket counter and Agent's office	\$5,350	SRA / Minor Capital
SCRRA / Ventura	Van Nuys	Hand dryer in three bathrooms	\$5,350	SRA / Minor Capital
SCRRA / Ventura	Van Nuys	New fiberglass reinforced plastic panel in the server room	\$1,529	SRA / Minor Capital
SCRRA / Ventura	Van Nuys	New shelving outside inside the cage	\$1,529	SRA / Minor Capital
SCRRA / Valley	Burbank	Update signage	\$33,782	SRA / Minor Capital
SCRRA / Valley	Burbank	Platform striping and verbiage	\$32,925	SRA / Minor Capital
BNSF / San Bernardino	Fullerton	New ticket counter	\$328,669	SRA / Minor Capital
BNSF / San Bernardino	Fullerton	Paint inside ticket office, agent's office and baggage area	\$8,408	SRA / Minor Capital
BNSF / San Bernardino	Fullerton	New ceiling tiles inside ticket area and baggage area	\$7,643	SRA / Minor Capital

Table 5.1: Programmed LOSSAN Agency Capital Projects (continued)

Operator / Subdivision	Station or Mileposts	Project Description	Estimated Cost	Funding Source
BNSF / San Bernardino	Fullerton	New Flooring inside ticket office and Agent's office	\$6,879	SRA / Minor Capital
BNSF / San Bernardino	Fullerton	Hand dryer in bathroom	\$2,293	SRA / Minor Capital
SCRRA / Orange	Anaheim	Cross hatched in red by rollup fire door and stencil "Keep Clear" and repair both baggage rollup door for code compliance	\$4,586	SRA / Minor Capital
SCRRA / Orange	San Juan Capistrano	Repaint inside waiting area and ticket office	\$12,994	SRA / Minor Capital
SCRRA / Orange	San Juan Capistrano	Purchase and install 5 benches similar to Maricopa	\$9,855	SRA / Minor Capital
SCRRA / Orange	San Juan Capistrano	New Flooring inside ticket office	\$3,822	SRA / Minor Capital
SCRRA / Orange	San Juan Capistrano	Relocate one camera in front of the entrance	\$1,529	SRA / Minor Capital
NCTD / San Diego	Solana Beach	Platform tactile replacement	\$289,172	SRA / Minor Capital
NCTD / San Diego	Old Town	Tactile and Striping	\$110,830	SRA / Minor Capital
NCTD / San Diego	Old Town	Platform shelter and platform LED lighting upgrade 28	\$97,859	SRA / Minor Capital
NCTD / San Diego	San Diego	480 V panel installation-2 (800A) for platform 2 & 3, 1 (800A) for platform 1, 1(200A) for private car	\$812,986	SRA / Minor Capital
NCTD / San Diego	San Diego	Platform tactile replacement (6000 LF)	\$693,123	SRA / Minor Capital
NCTD / San Diego	San Diego	Upgrade existing camera system to Genetec	\$560,520	SRA / Minor Capital
NCTD / San Diego	San Diego	Bathroom upgrades: Mens (4 stall including 1 ADA, 2 urinal, 4 sink, 2 hand dryer, lighting) and Womens (5 stall including 1 ADA, 4 sink, 2 hand dryer, lighting)	\$229,304	SRA / Minor Capital

TOTAL PROGRAMMED LOSSAN AGENCY CAPITAL IMPROVEMENTS \$175,295,872

Table 5.2: Programmed LOSSAN Partner and Member Agency Capital Projects

Lead Agency	Project Location	Project Title	Project Description	Estimated Cost
City of Grover Beach	Grover Beach Amtrak Station	Grover Beach Train Station Expansion Project	Expands the existing train station parking lot to the south on approximately 1 acre of land. The project provides a new bus stop and shelter adjacent to the existing rail platform. Will provide an additional 40-45 parking spaces for transit parking, van and carpooling and will include the installation of bike lockers.	\$3,000,000
Oxnard	Coast Main Line at Rice Avenue	Rice Avenue Grade Separation	Construct grade separation structure to elevate Rice Avenue over SR-34 and the UPRR track. Includes the construction of two connector roads, one in the southeast quadrant and another in the southwest quadrant of the Rice Avenue grade separation.	\$79,192,000
LA Metro	LA Union Station	Link Union Station	Extending Los Angeles Union Station tracks across US 101	\$950,000,000
LA Metro	Chatsworth Station	Chatsworth Station Improvements	This project will make enhancements at the Chatsworth Station to make it ADA compliant. This includes the platforms, accessible parking spaces, passenger loading areas, ramps, signage, etc.	\$4,000,000
City of Fullerton	Fullerton Station	Fullerton Elevator Project	Additional elevators will be added to both ends of the existing pedestrian overpass.	\$4,600,000
OCTA	Laguna Niguel/ Mission	Video Surveillance System installation	Installation of a video camera system at the station.	\$450,000
OCTA	San Juan Capistrano; MP193.9 to MP195.7	Laguna Niguel to San Juan Capistrano Passing Siding Project	Addition of approximately 1.8 miles of new passing siding railroad track on the LOSSAN rail corridor.	\$34,060,000
SCRRA	San Juan Capistrano; MP197.4 to MP198.4	San Juan Creek Bridge Replacement Project	Replacement of 304-foot long single track rail bridge adjacent to the existing and track realignment.	\$38,333,000
OCTA/SCRRA	Various Locations; MP185.2 to MP199.2	Slope Stabilization Project	Stabilization of slopes from Irvine to San Juan Capistrano at various locations including drainage improvements.	\$4,000,000
SANDAG	Poinsettia Station	Poinsettia Station Improvements	Construct a new grade-separated pedestrian crossing, install new platform, fence, reconfigure tracks, and install two crossovers, signals, and track improvements.	\$28,700,000

Table 5.2: Programmed LOSSAN Partner and Member Agency Capital Projects (continued)

Lead Agency	Project Location	Project Title	Project Description	Estimated Cost
SANDAG	CP Cardiff (MP 239.6) to CP Craven (MP 241.1)	San Elijo Lagoon Double Track	The project includes 1.5 miles of new double-track from CP Cardiff (MP 239.6) to CP Craven (MP 241.1). The project also includes replacement of BR 240.4 and installation of new signals.	\$75,600,000
SANDAG	Chesterfield Drive Crossing	Chesterfield Drive Crossing Improvements	The project includes final design and construction of at-grade crossing improvements including all bike and pedestrian facilities, double track rail, signals, and safety improvements at Chesterfield Drive.	\$6,200,000
SANDAG	MP 260.4, 259.6, 259.1, 258.6 and 257.2	Elvira to Morena Double Track	and install new signals. Construct new/replacement bridges at MP 260.4, 259.6, 259.1, 258.6 and 257.2. Construct new water/sewer facilities for City of San Diego between Friars Road and SR 52.	\$192,500,000
SANDAG	CP Tecolote (MP 263.2) to CP Friar (MP 264.1)	San Diego River Bridge	This project will add 0.9 miles of second main track and realignment from CP Tecolote (MP 263.2) to CP Friar (MP 264.1) and replace the San Diego River Bridge with a double track bridge.	\$93,900,000
TOTAL PROGRAMMED MEMBER/PARTNER AGENCY PROJECTS				\$1,514,535,000

Chapter 6: Fare Policy

Pacific Surfliner trains currently offer travel in unreserved coach class and reserved business class. If traveling in unreserved coach, passengers do not need to make an advanced reservation for a specific train, except during Thanksgiving week and select special events, when all seats on Pacific Surfliner trains are reserved. Pacific Surfliner fares are largely static year-round and do not vary by day of the week, with nominal increases on select holiday and traditionally busy travel periods. Business class requires an advanced train-specific reservation and a 50 percent upcharge, with a minimum \$10 upgrade fee. In addition to a guaranteed seat, business class also provides a beverage, snack, newspaper, and service from a dedicated train attendant on most trains.

Ticket types available on the Pacific Surfliner include: one-way, roundtrip, 10-trip tickets, and monthly passes for unreserved coach. Roundtrip tickets are priced at twice the one-way fare. The 10-trip ticket is valid for ten one-way trips between a specific station pair within a 60-day period from date of first use, and can be used by more than one passenger. Ten-trip tickets are discounted below one-way and roundtrip tickets, with all station pairs priced at a consistent 40 percent off the equivalent single ride fares. Monthly tickets are valid for unlimited travel for an entire calendar month for the passenger named on the ticket.

The LOSSAN Agency implemented a fare restructuring in March 2018. This is the only fare change to take place since signing the ITA in June 2015, as can be seen in table 6.1.

Table 6.1: Historic Pacific Surfliner Fare Adjustments

Date	Increase
June 2003	3 percent
June 2004	3 percent
June 2005	5 percent
December 2005	5 percent
June 2006	5 percent
October 2006	5 percent
February 2009	N/A -- fare restructuring
February 2010	2 percent
June 2010	3 percent
June 2011	2 percent
September 2011	Seasonal fare change eliminated
August 2012	2 percent
June 2013	2 percent
March 2018	N/A – fare structuring

Everyday Discount Programs

In addition to discounted multi-ride tickets, Amtrak previously offered everyday discounts on Pacific Surfliner tickets to senior citizens age 62 and older (15 percent), disabled riders (15 percent), children age 12 and under (50 percent), and members of the National Association of Railroad Passengers and Automobile Association of America (AAA) (10 percent), and a national student discount program that provided a 15 percent discount for students aged 13 to 25 years old.

On January 9, 2018, Amtrak made significant changes to their national tariff policy. The most impactful of these are reductions to some everyday discount programs and the complete elimination of others. The LOSSAN Agency rejected a number of these changes and the LOSSAN Agency Board adopted a revised fare and tariff policy that maintained the current everyday discounts for the Pacific Surfliner service except for AAA and active military personnel and military veterans.

Other Discount Programs

The LOSSAN Agency and Amtrak occasionally partner with local destinations and/or convention and visitors bureaus to offer special discounts for travel to a specific location. For example, the Santa Barbara and San Luis Obispo Car Free programs offer a 20 percent discount off Pacific Surfliner tickets for travel to stations in those counties. Amtrak also offers a California rail pass, which offers travel on any seven days in a 21-day period on all three state-supported intercity routes in California, as well as the Coast Starlight and most Amtrak Thruway buses. When requested by the LOSSAN Agency, Amtrak can also offer special discounts to one-time events using a special promotional code. Groups of 15 or more on the Pacific Surfliner can receive a 20 percent discount on regular fares on select trains based on projected seat inventory and season of travel. The Kids 'n' Trains program provides reduced group fares for school and youth groups traveling on the Pacific Surfliner on select mid-week trains. In addition, SBCAG is currently subsidizing a limited-term discount on 10-trip and monthly passes between stations in Ventura County and Santa Barbara/Goleta to help encourage ridership on the new peak-period service between Ventura and Santa Barbara Counties.

Rail 2 Rail Programs

There are currently two distinct Rail 2 Rail programs in place that allow Metrolink and COASTER pass holders to ride Pacific Surfliner trains at no additional cost using their valid commuter rail tickets and/or monthly passes.

Metrolink: The Rail 2 Rail program allows Metrolink monthly pass holders who travel on Metrolink's Orange and Ventura County lines to travel on Pacific Surfliner trains within the limits of the station pairs of their pass at no additional charge, including on Saturday and Sunday. The Rail 2 Rail program does not apply to Metrolink one-way, roundtrip, and seven-day passes except on Pacific Surfliner trains between Los Angeles and Burbank Airport. Pacific Surfliner monthly pass holders may also ride any Metrolink train within the station pairs on their Amtrak monthly pass. Amtrak conductors scan the Metrolink passes and Metrolink is billed for each Rail 2 Rail boarding at a reimbursement rate of \$7.00 per boarding.

COASTER: NCTD currently has a modified Rail 2 Rail program agreement whereby COASTER passengers may travel on any Pacific Surfliner trains using a valid COASTER RegionPlus, monthly or day pass. NCTD reimburses Amtrak \$4.42 per Rail 2 Rail rider, which is the approximate average fare collected per passenger boarding on the COASTER service. Pacific Surfliner monthly pass holders and one-way and roundtrip ticket holders may also ride any COASTER train within the station pairs on their Amtrak ticket at no additional charge.

Additional Fare Enhancement Opportunities

In FY 2019-20, the LOSSAN Agency will continue to work with Amtrak to explore opportunities to increase fare revenue while maintaining and expanding ridership, including:

- Implement a new small group discount program during times of lower travel demand. Previous attempts to implement this program have not been successful due to limitations within the Amtrak ticketing system. LOSSAN Agency staff continues to work with Amtrak on a solution and hopes to have a pilot project in place by fall 2019.
- Increasing public awareness of the Pacific Surfliner Transit Transfer Program, which allows Pacific Surfliner passengers to make seamless connections to local transit services.
- Increasing public awareness of existing everyday discount programs, especially student and group discounts, including the Kids n Trains program.
- Continue the expansion of partnerships with the San Diego Padres, Del Mar Racetrack, Anaheim Ducks and other event organizers to promote taking the Pacific Surfliner to sporting events, concerts, and other special events served by the Pacific Surfliner.
- Enhance customer loyalty and referral programs, including Amtrak Guest Rewards program, to retain existing and attract new riders.

Chapter 7: Network Integration, Coordination and High-Speed Rail

An integrated passenger rail network is a key initiative included in the 2018 California State Rail Plan, with the goal to plan and implement a statewide passenger rail system that maximizes the performance potential of intercity passenger rail as a time- and cost-competitive travel option for meeting the state's transportation needs. Several opportunities exist for better integrating the Pacific Surfliner service with the existing, planned and proposed transit and rail network along the 351 mile LOSSAN rail corridor.

Statewide and Regional Coordination

The LOSSAN Agency works in close coordination with CalSTA, Caltrans DRMT, transit and rail operators along the LOSSAN rail corridor, and other stakeholders on efforts to improve rail and transit connections. This includes working to create an integrated passenger rail and transit network with coordinated schedules, which will provide additional travel options throughout the state, allowing passengers to seamlessly transfer from service to service to reach their desired destinations.

Specifically, the LOSSAN Agency has worked with rail operators and stakeholders in the Los Angeles to San Diego segment of the LOSSAN rail corridor to establish a leadership working group to guide coordinated planning and service integration efforts. The group includes executive level participation from the LOSSAN Agency, NCTD, Metrolink, BNSF, CHSRA, Caltrans DRMT, and CalSTA. Together the members are working collaboratively to improve rail service through service optimization and modeling efforts, joint funding pursuits, and coordinated ticketing and dispatch policies.

Transit Connections

The LOSSAN Agency has built strong working relationships with the regional transit operators along the rail corridor. In 2016, the LOSSAN Agency implemented the Pacific Surfliner Transit Transfer Program, providing seamless transfers to 11 local public transit services along the LOSSAN rail corridor and creating more convenient first- and last-mile connections.

The Amtrak-operated Thruway bus service also provides key connections and is coordinated with the San Joaquins and Capitol Corridor intercity rail services, providing connectivity to the statewide rail system. The LOSSAN Agency has worked with SJJPA, CCJPA and Amtrak to implement updated branding on all Amtrak Thruway buses that reflect the service's key role in connecting California's three intercity rail corridors. The LOSSAN Agency will continue to work with Amtrak to review operations of the Thruway bus service and look for opportunities to improve connectivity and efficiency. Pacific Surfliner trains also provide timed connections in Los Angeles to three Amtrak long-distance trains serving destinations including Chicago, New Orleans, Portland, and Seattle.

Integrated Fare Structure

There are several short- and long-term efforts being evaluated or undertaken by the State and local agencies to introduce a more integrated and seamless ticketing system for passenger rail and connecting transit services. In late 2017, the LOSSAN Agency participated in a workshop

hosted by CalSTA to discuss statewide fare integration and coordination of passenger rail and mass transit services. This was the first step in an effort to provide integrated, end-to-end public transportation services that are accessible, convenient, and provide a viable alternative to single occupancy vehicle travel. The LOSSAN Agency also participated in a statewide integrated travel conference held in spring of 2018 that allowed statewide transportation agencies to learn more about integrated travel concepts and help shape progress towards a pilot program within two years. Following this conference, the CCJPA was awarded TIRCP funding to develop a pilot for a Statewide Integrated Travel Program, focused on developing a statewide trip planning and fare integration strategy among multiple agencies using modern software platforms to enhance connectivity, efficiency, and ridership across California, including on the Pacific Surfliner.

In parallel with this statewide effort, the LOSSAN Agency has also been working with Metrolink, Metro, Amtrak and NCTD on shorter-term solutions to provide easier integration for passengers between services. As part of a corridorwide optimization study that will be led by the LOSSAN Agency, various cost sharing methodologies will be evaluated to identify solutions for sharing between agencies the revenue and costs associated with a more integrated ticketing strategy.

Sub-Regional Transit and Rail Integration Studies

Beyond the corridorwide and statewide efforts and strategies noted above, several LOSSAN member agencies have begun work to study more localized passenger rail service along the LOSSAN rail corridor. These local concepts are summarized below.

- *SBCAG Regional Transit and Rail Planning and Integration Study*

As part of the 2018 TIRCP grant awards, SBCAG received funding to perform a sub-regional transit and rail planning and integration study. This study is intended to take a focused look at identifying the regional mobility needs along the LOSSAN rail corridor between Ventura and San Luis Obispo, and identify potential new, modified or expanded service options, including the best methods for integrating these services into the existing transit and rail network. The LOSSAN Agency will coordinate with its member agencies in Ventura, Santa Barbara and San Luis Obispo counties on this study.

- *Feasibility Analysis for using Diesel Multiple Units*

In November 2018, SLOCOG submitted a request for funding as part of the Caltrans Strategic Partnerships & Transit Planning Grant program call for projects. The intent of this study is to evaluate the feasibility of operating Diesel Multiple Units (DMUs) along the LOSSAN rail corridor between Guadalupe (in Santa Barbara County) and San Luis Obispo to provide a transportation option for business commuters and local leisure travelers within the Central Coast region that cannot be served by the existing Pacific Surfliner service. The LOSSAN Agency is supportive of this effort to provide more localized passenger rail service within the LOSSAN rail corridor and will be working with SLOCOG and the other corridor stakeholders to identify opportunities for implementing more locally focused rail service that can expand the reach and enhance the connectivity of the Pacific Surfliner service.

Link Union Station

The LOSSAN Agency is participating in planning and design meetings related to the Link Union Station (Link US) project. The project, being managed by Metro, will transform Los Angeles Union Station (LAUS) from a “stub-end” station, to a “run-through” station by extending tracks south over the US 101 freeway, resulting in reduced travel times, particularly for Pacific Surfliner passengers traveling through Los Angeles. Link US will also reconfigure station entry tracks and station boarding platforms to improve efficiency, and create a new passenger concourse with improved retail, food and passenger waiting areas. The Link US team is also working with CHSRA to explore options to incorporate future High-Speed Rail (HSR) service at LAUS. An updated Environmental Impact Statement/Environmental Impact Report for the Link US Project is expected to be released in the first half of 2019.

Southern California Optimized Rail Expansion Program

The Southern California Optimized Rail Expansion (SCORE) program is a multi-year, \$10 billion program managed by Metrolink to upgrade the regional rail system in Ventura, Los Angeles, Orange, San Bernardino and Riverside Counties to meet the current and future needs of the traveling public. The SCORE program is more than just adding tracks, grade separations and upgrading signal systems across the Metrolink system. The vision is to provide the infrastructure necessary to operate more trains with greater frequency and reliability, making regional rail travel easier and more convenient.



The LOSSAN Agency is an important partner in this program, working with Metrolink, BNSF, Caltrans DRMT, CHSRA and CalSTA in the development of a phased implementation strategy for the program that begins the integration of the regional passenger rail services and allows for the eventual introduction of high-speed rail as part of the regional rail network.

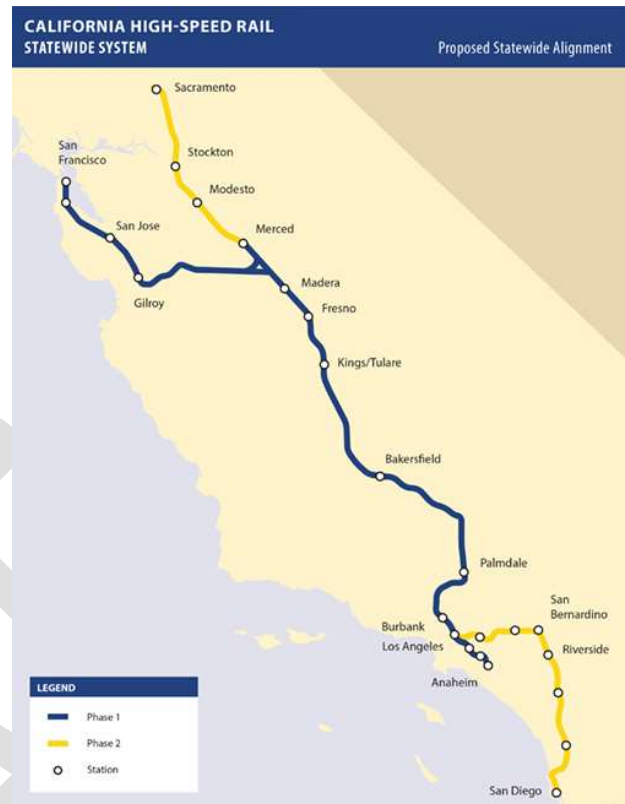
High-Speed Rail Connection

The planned HSR system is an integral component of the statewide passenger rail system, and integration with the HSR system will be key to the statewide network integration effort. The passenger rail services along the LOSSAN rail corridor serve as a backbone for transportation throughout the central and Southern California coastal regions. As such, the LOSSAN rail corridor will provide critical connections to support and compliment the HSR system. Integration between the LOSSAN rail corridor and HSR system will provide mutual benefits to each service and must be planned carefully to build upon the existing success of the Pacific Surfliner service.

The CHSRA adopted its most recent Business Plan in June 2018. As with the previous Business Plan, CHSRA continues to recognize the interregional importance of the Burbank to Anaheim segment of the HSR system and the need to make strategic investments that will help link rail systems together over time. In FY 2019-20, the CHSRA and the LOSSAN Agency will continue efforts to coordinate planning and design efforts in the LOSSAN rail corridor, including projects that will directly impact the Pacific Surfliner service such as the enhancements identified along the BNSF railway at Fullerton Junction and through Commerce, in addition to longer-term projects identified for the corridor north of Los Angeles to Burbank.

Phase 2 of the CHSRA project is planned to ultimately extend HSR from Los Angeles to San Diego via an inland route, providing improved travel times, and changing the role of the Pacific Surfliner into more of a feeder route to HSR, particularly for coastal communities in Orange and San Diego counties.

Figure 7.1: California High-Speed Rail Statewide System



Source: CHSRA, 2019

Chapter 8: Passenger Amenities

In order to make the Pacific Surfliner an attractive travel alternative, the LOSSAN Agency has worked with Amtrak to implement initiatives designed to enhance amenities and improve the overall passenger experience. This chapter focuses specifically on enhancements to passenger services and amenities that have been prioritized by the LOSSAN Agency for the Pacific Surfliner service in FY 2019-20 and FY 2020-21.

On-Board Amenities

Bicycle Storage: Each Pacific Surfliner train has storage space for seven bicycles in the cab car. A bicycle reservation system allows passengers to reserve a spot for their bicycle free of charge when they book their train ticket. The Pacific Surfliner continues to receive the most bicycle reservations of any Amtrak route in the nation, carrying more than half of the bicycles in the entire Amtrak system. The LOSSAN Agency will work with Amtrak on identifying opportunities to expand bicycle storage as needed, as well as options to allow Amtrak multi-ride ticket holders to make bicycle reservations electronically, which is not currently available.

Business Class: Business class is a popular amenity on the Pacific Surfliner. With a business class ticket, passengers receive a guaranteed seat; self-serve coffee, tea, and pastries in the morning, and at-seat snack and beverage service in the afternoon, as well as a dedicated attendant on most trains. Passengers also receive access to the Amtrak Metropolitan Lounge in Los Angeles, priority boarding at the Santa Fe Depot in San Diego, and bonus Amtrak Guest Rewards points. The LOSSAN Agency worked with Amtrak in late 2016 to expand business class capacity in direct response to passenger demand. This was achieved by utilizing the Superliner long-distance car as a second business class car when needed based on passenger demand. To maintain the quality of the business class experience, the LOSSAN Agency will continue to work with Amtrak to enhance the amenities offered in business class in a cost-effective manner, potentially including upgraded seat coverings and expanded at-seat food and beverage options.

Food and Beverage: In FY 2018-19, the LOSSAN Agency continued to work with Amtrak to evaluate existing food and beverage offerings based on sales and revenue data, and implemented regular menu “refreshes” to introduce new locally sourced fresh food items and local craft beers. The LOSSAN Agency continues to produce and distribute updated menus including attractive photography and product descriptions that highlight the organic, locally-sourced food items available on board. The menu changes have led to a net increase in food and beverage revenue and overall customer satisfaction. Working with Amtrak to introduce additional new locally sourced products will continue to be a priority for the LOSSAN Agency throughout FY 2019-20.

On-Board Information System: LOSSAN Agency staff have been working with Caltrans DRMT on a new On-Board Information System (OBIS). The state-funded OBIS upgrade project would provide automated audio and visual messages onboard Pacific Surfliner trains, including information on next stop, delays, food service, connecting transit, and safety/security-related messages. Staff will continue working closely with Caltrans DRMT and Amtrak, as well as both

the CCJPA, and SJJPA on next steps to ensure the upgrade is implemented in a cost-effective manner.

Wi-Fi: All Pacific Surfliner trains currently offer Wi-Fi service, which has proven to be a popular passenger amenity. The LOSSAN Agency is working with Amtrak and Caltrans DRMT to build on the success of the existing Wi-Fi service by improving the speed and reliability of the service. Due to limited bandwidth, the existing Wi-Fi service is often unreliable and speeds are slower than desired. A number of options are being explored for further improving the quality and reliability of on-board Wi-Fi service.

Service Amenities

Customer Communication: The LOSSAN Agency continues to have an active presence on social media, and has seen a consistent growth in followers on all Pacific Surfliner social media channels. Through these channels, LOSSAN Agency staff is able to engage with current and prospective passengers, helping to promote future travel on the Pacific Surfliner. In the coming year, the LOSSAN Agency will further grow its email database using a new email platform, and work with partner agencies to expand digital content to include additional “how-to” articles and destination guides.

Joint Promotions: In FY 2019-20, the LOSSAN Agency will continue coordinated marketing efforts with local convention and visitors bureaus, connecting transit agencies and key attractions along the Pacific Surfliner route. In FY 2018-19, the LOSSAN Agency worked on a number of successful joint promotions, including with the San Diego Padres, Anaheim Ducks, Los Angeles Angels of Anaheim, Operation Lifesaver, Live Nation, Visit Santa Barbara and the Disneyland Resort. These efforts will continue in the coming year to provide special offers and incentives to Pacific Surfliner passengers. Additional staff and consultant resources were also secured to assist with field marketing efforts following Amtrak’s decision to curtail field marketing support.

Rail 2 Rail Program: The LOSSAN Agency will continue to work with Amtrak, Metrolink, and NCTD to offer a Rail 2 Rail program benefit to customers that provides an equitable reimbursement rate to the Pacific Surfliner for carrying Metrolink and COASTER pass holders on state-funded intercity trains. In October 2018, the Rail 2 Rail program with NCTD was modified to allow NCTD multi-ride passes to be used on all Pacific Surfliner trains while also eliminating additional COASTER stops that were previously made by some Pacific Surfliner trains.

Seating Availability: The LOSSAN Agency will work with Amtrak on providing information to passengers during the booking process indicating how full a particular train is expected to be based on historical ridership data and current reservations. This would allow passengers to shift to a different unreserved train that was expected to be less crowded to avoid trains at peak capacity. Amtrak introduced a seat reservation system on the Acela route that offers an airline-style seating map, allowing passengers to book a specific seat in advance, including four-seaters for groups of three or more. The LOSSAN Agency has requested that a similar system be implemented on the Pacific Surfliner for business class seating.

Service Disruptions: Improving communication with passengers during a planned or unplanned track closure or service disruption is an important service amenity that the

LOSSAN Agency will focus on during FY 2019-20. Service disruption updates are currently posted on the @pacsurfliners Twitter channel, which has resulted in positive customer feedback. The LOSSAN Agency will explore options to send follow-up correspondence to passengers after major delays explaining the cause of the delay and acknowledging the inconvenience they experienced using passenger data retained by Amtrak.

Special Event Service: The LOSSAN Agency will work with Amtrak to expand Pacific Surfliner service to special events that draw large crowds including the Del Mar Racetrack, San Diego Comic-Con International, major sporting events and festivals, and during major government holidays, while also ensuring that appropriate resources (rolling stock, staffing, etc.) are made available to accommodate anticipated demand.

Train Status Information: Amtrak currently provides train status information through a number of channels, including announcements at staffed stations, Passenger Information Display System signs on station platforms, and online through the “train status” feature on Amtrak.com and the Amtrak mobile app. The LOSSAN Agency works with Amtrak to provide service alerts on the @pacsurfliners Twitter channel, which supplies more detailed information during service disruptions. The LOSSAN Agency will continue to look for opportunities to further enhance train status updates, including a more user-friendly Web-based train tracker that shows the real-time position of Pacific Surfliner trains on a route map. In addition, the LOSSAN Agency is working with Amtrak to improve the accuracy of the train status data currently offered through the Amtrak app and Amtrak.com.

Transit Transfer Program: The Pacific Surfliner Transit Transfer Program was implemented in 2016 as a result of a successful TIRCP grant. The Transit Transfer Program offers seamless connectivity to more than 11 local public transit services along the LOSSAN rail corridor. The LOSSAN Agency is working with local transit providers to continue marketing efforts for the program. Originally intended as a one-year pilot program, this program was extended for two additional years, through June 2019, using existing TIRCP funds. The LOSSAN Agency intends to continue this program using annual operating funds after expiration of the TIRCP funds. The LOSSAN Agency is also exploring the feasibility of using Amtrak tickets to transfer to the Metro Rail system in Los Angeles in coordination with Metro and Metrolink.

Station Amenities

Station Host Program: The LOSSAN Agency will investigate the feasibility of launching a pilot program to provide station ambassadors at select Pacific Surfliner stations, including best practices from other state-supported Amtrak routes with similar programs. The station host program would assign trained volunteers to provide service-related information at select Pacific Surfliner stations. A pilot program could also be launched at stations shared with Metrolink and/or COASTER to help direct passengers to their trains and correct platforms.

Station Improvements: Using previous studies and input from member agencies and station owners, the LOSSAN Agency prepared a CIP that includes a number of station related improvements that are candidates for minor capital program funds, as well as state and federal safety/security funds, SRA funds and future TIRCP funds. The CIP (as detailed in Chapter 5) prioritizes funding for station and platform improvements, including enhanced wayfinding signage at Pacific Surfliner stations, as well as safety and security upgrades.

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Chapter 9: Equipment

The cars primarily used on the Pacific Surfliner were purchased by Amtrak and have been in service since 2000. Additional cars were purchased by the State of California in 2002 to supplement the Amtrak owned fleet by adding seating capacity and additional Pacific Surfliner service. As the ridership continued to grow, additional Amtrak equipment (both single and bi-level cars) has been leased by the State of California to provide the necessary capacity to support the passenger demand on the Pacific Surfliner.

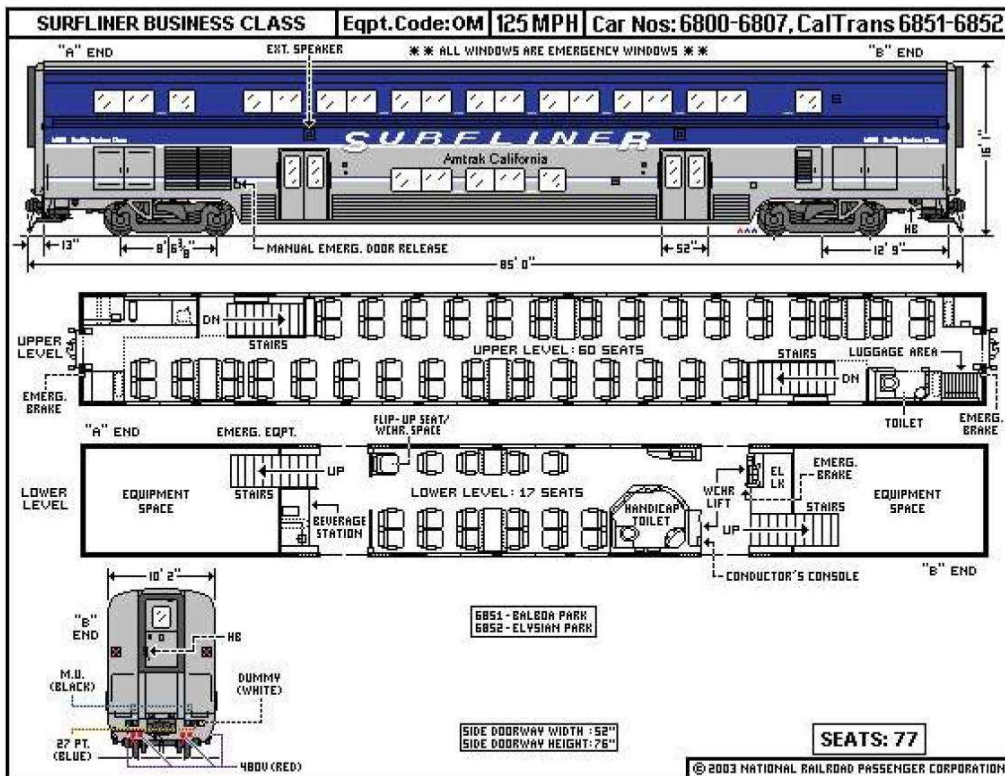
Currently, Amtrak operates 25 daily (24 on weekends) Pacific Surfliner trips using 10 train sets. A typical train set consists of one locomotive and six passenger cars, including one business class car, one Superliner car for additional business class seating, one Café car with coach seating, two coach cars, and one cab/baggage car with additional coach seating. This typical train set provides approximately 480 passenger seats. Additional passenger cars are added to accommodate anticipated increases in demand associated with holidays and special events.

A description and schematic layout of the types of cars currently used to provide Pacific Surfliner service are provided in Table 9.1 and associated Exhibits.

Table 9.1: Pacific Surfliner Fleet Description

Type	Car Description	Seating Capacity
Business Class	Reserved seating on upper and lower levels with dedicated attendant; complimentary at-seat snack and beverage service	72
Café	Regular coach seating on upper level; booth seating and Café area with food and beverage service on lower level	72
Coach	Unreserved seating on upper level with limited seating for seniors/disabled on lower level	90
Superliner Coach	Upper level includes curtain to allow half or full car to be used for business class seating. Some cars have additional seating on the lower level	62-74
Cab/Baggage	Unreserved seating on upper level and cab area for engineer to operate train; limited senior/disabled seating, bike rack accommodating seven bikes and secured area for storage of checked baggage on lower level	82

Exhibit 9.1: Pacific Surfliner Business Class Car



Note: Business class cars have been reconfigured to add a lower level luggage rack and improved lower-level seating, resulting in a net reduction of five seats, for a total of 72.

Exhibit 9.2: Pacific Surfliner Café Car

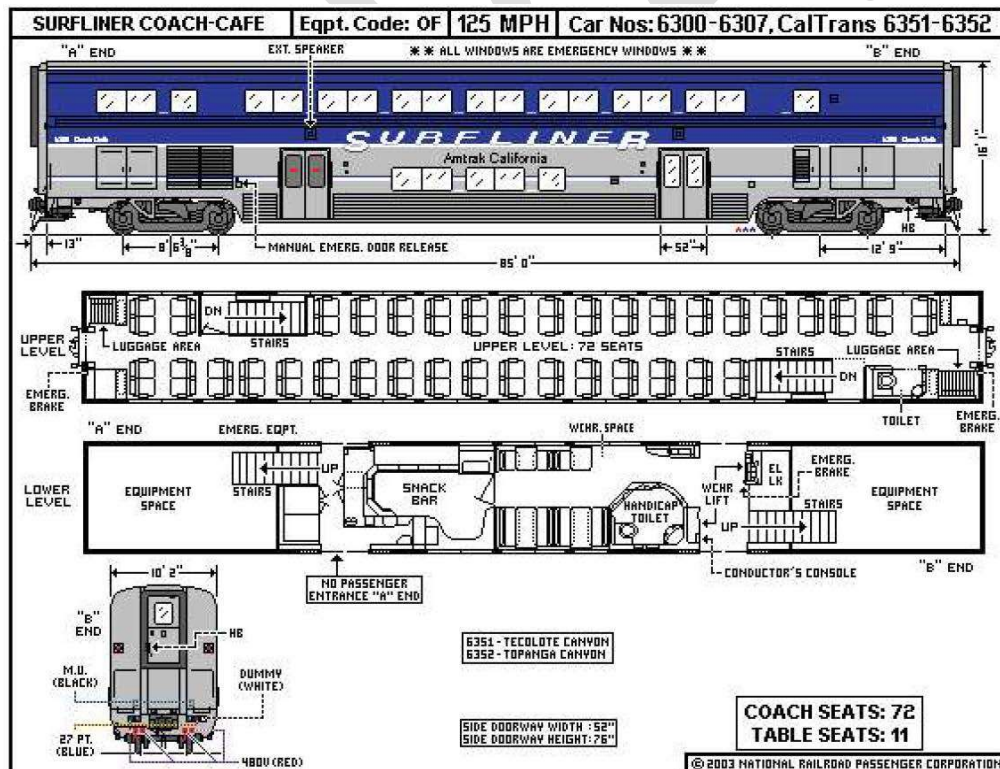


Exhibit 9.3: Pacific Surfliner Coach Car

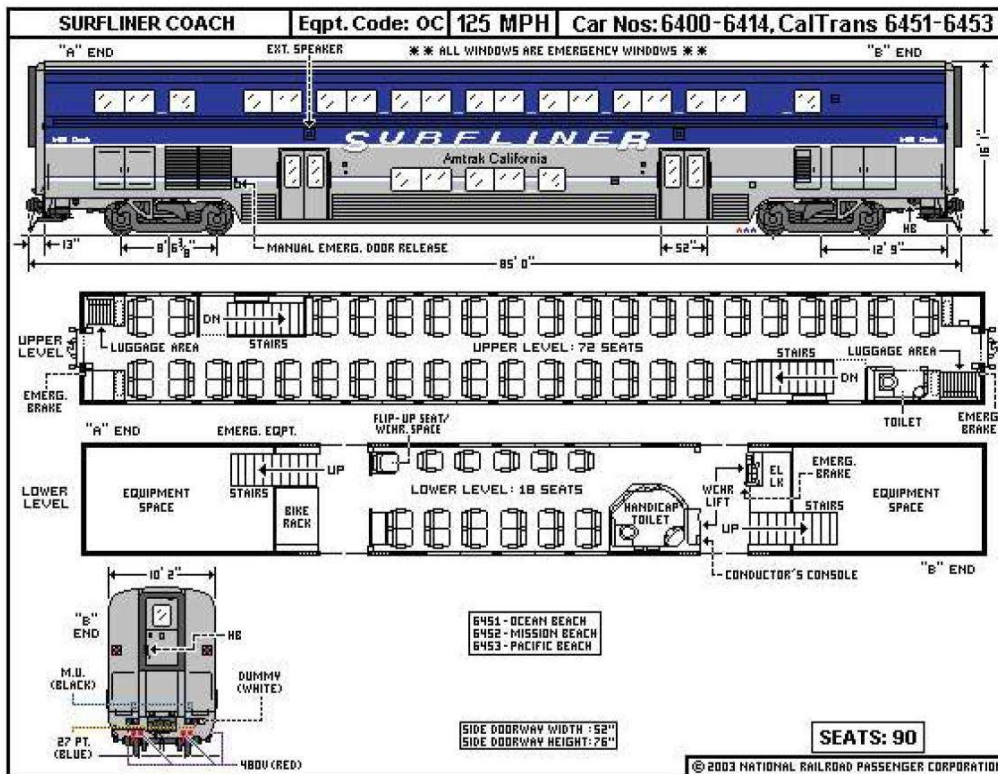


Exhibit 9.4: Pacific Surfliner Cab/Baggage Car

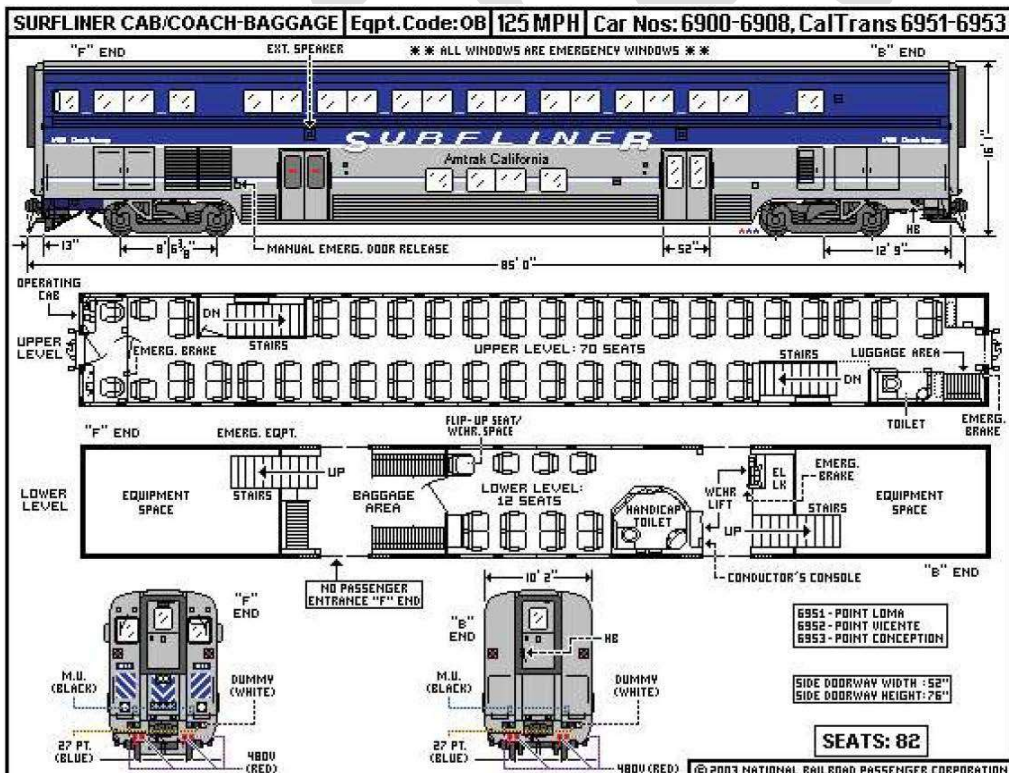
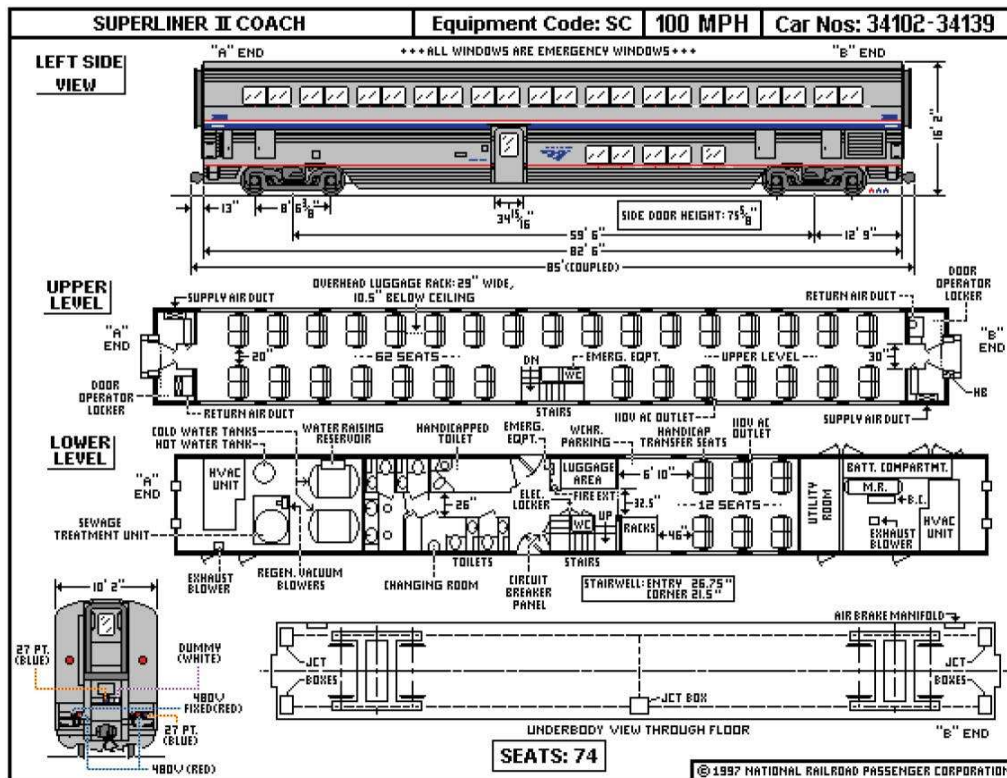


Exhibit 9.5: Pacific Surfliner Superliner Car



The locomotives and passenger cars used to provide the Pacific Surfliner service have historically been primarily owned by Amtrak and leased by Caltrans DRMT for use on the service. The lease fees and capital equipment charges associated with the Amtrak-owned equipment are included in a separate agreement between Caltrans DRMT and Amtrak.

Included in the Pacific Surfliner fleet are 49 bi-level passenger cars, ten of which are owned by the State of California and the remaining 39 by Amtrak. In addition to the 49 Pacific Surfliner-branded bi-level cars, the State of California, through Caltrans DRMT, leases approximately eighteen Amtrak-owned bi-level Superliner coach and coach-baggage cars, and one Superliner café car. These cars are typically used on Amtrak's long-distance trains, but have been modified to run in "push-pull" operation and have also been equipped or are being equipped to support the Wi-Fi service offered on Pacific Surfliner trains. As of 2018, 10 of these Superliner cars are regularly used on the Pacific Surfliner service as a second business class car for additional business class seating.

Caltrans DRMT also leases 14 Amtrak-owned single-level Amfleet and Horizon cars, as well as two F40 Cab Cars, which are non-powered locomotives that carries baggage and acts as a cab car. Not all of these cars are available for exclusive Pacific Surfliner use. Additionally, these cars do not have automatic doors, which requires conductors to manually open and close doors at each stop and requires passengers to climb several steps to board the train, which can increase station dwell times. Of the 10 trainsets used to operate Pacific Surfliner service, nine currently consist of a combination of bi-level Surfliner and Superliner cars, and one consists of single-level Amfleet and Horizon cars.

Beginning in 2018, Caltrans DRMT and the LOSSAN Agency started to phase out the older Amtrak-owned Electro-Motive F-59PHI locomotives that had provided power on the Pacific Surfliner service since 1998 and replace them with new 4,400 horsepower (HP) state-owned Siemens Charger SC-44 locomotives. In addition, the LOSSAN Agency and Caltrans DRMT maintain a lease with Amtrak for the nonexclusive use of several 4,250 HP Amtrak-owned P-42 locomotives, which serve as spares for the Pacific Surfliner service. Amtrak routinely positions a spare “protect” locomotive in San Diego and Los Angeles that is available to assist in the event a train encounters a mechanical issue. A summary of the equipment currently used to provide daily Pacific Surfliner service, and its ownership, is provided in Table 9.2.

Table 9.2: Pacific Surfliner Equipment Breakdown for FY2019-20

	FY2019-20	
	State-Owned	Leased from Amtrak*
Cab Car	3	8
Coach	3	15
Business Class	2	8
Café Car	2	8
Superliner Coach and Coach/Baggage	0	18
Superliner Café Car	0	1
Amfleet/Horizon	0	14
Total Rolling Stock	10	72
GE P-42DC	0	2
F40 Cab Car	0	2
Siemens Charger SC-44	14	0
Total Locomotives	14	4

*Not all Amtrak leased equipment available for exclusive Pacific Surfliner use

Source: Caltrans and Amtrak, 2019

New Equipment

Caltrans DRMT, along with the Illinois Department of Transportation (IDOT), received federal funds through the High-Speed Intercity and Passenger Rail competitive grant program to procure new rolling stock for California’s three state-supported intercity rail services. In December 2011, the California Transportation Commission (CTC) approved the allocation of \$42 million of Prop 1B funds as a local match to \$168 million in federal funds for both railcars and locomotives. In November 2012, Caltrans DRMT awarded a \$352 million contract to Sumitomo Corporation of America to build new railcars that meet the federal standards required of the Next Generation Equipment Committee. Design and testing issues led to delays in the production of the new railcars, and ultimately the transfer of the railcar contract from Sumitomo Corporation to Siemens. In November 2017, Caltrans DRMT awarded a contract to Siemens through

Sumitomo Corporation to manufacture a total of 137 single-level passenger railcars with 49 for use in California, with delivery expected to begin in late 2020. These railcars meet Buy America provisions and are being manufactured in Sacramento and will be available for use on all three state-supported routes. The LOSSAN Agency is currently working with Caltrans DRMT and the CCJPA and SJPA to finalize a fleet deployment plan to be implemented once the new cars begin arriving.

Equipment Maintenance

The primary maintenance facility for all Pacific Surfliner rolling stock is Amtrak's Redondo Locomotive Maintenance Facility located adjacent to the LOSSAN rail corridor near downtown Los Angeles. This facility includes locomotive and vehicle repair shops that perform safety inspections, servicing, and maintenance of all Amtrak locomotives and rolling stock. Amtrak utilizes a smaller servicing facility in Goleta and San Luis Obispo for fueling, cleaning, and overnight train inspections. In San Diego, these services are performed at the Santa Fe Depot. While in San Luis Obispo, the Pacific Surfliner trainset is stored on a designated layover track adjacent to a UPRR locomotive servicing track and across from the San Luis Obispo station. The Los Angeles and Goleta maintenance facilities are owned by Amtrak, while the San Diego and San Luis Obispo facilities are through long-term lease agreements with the right-of-way owners.

Amtrak staff is responsible for all maintenance activities related to the Pacific Surfliner service as part of the annual operating agreement with the LOSSAN Agency. The LOSSAN Agency is responsible for administration and maintenance supervision of the Pacific Surfliner fleet, particularly the ten state-owned railcars and 14 Siemens Charger Locomotives. This relationship is further defined in the Equipment Lease Agreement between Caltrans DRMT and the LOSSAN Agency, which is included as an appendix to the ITA. The LOSSAN Agency is also responsible for ensuring the Pacific Surfliner fleet is operated and maintained to the high standards of reliability, cleanliness, and safety set by Amtrak and the state on a day-to-day basis. LOSSAN Agency staff will continue to work closely with Caltrans DRMT and Amtrak to refine the maintenance and operations programs to improve the reliability, safety, and the cost-effectiveness of the fleet.

Caltrans DRMT is responsible for overseeing wreck repair and also participating in the oversight of modifications to state-owned equipment. Additionally, Caltrans DRMT is responsible for statewide fleet planning and deployment of equipment between the three state-supported intercity rail corridors (Pacific Surfliner, Capitol Corridor, San Joaquins) in consultation with each agency.

Amtrak Thruway Bus Service

Amtrak contracts with private bus companies to provide Amtrak Thruway bus service connecting to the Pacific Surfliner route, and the private bus operators provide the vehicles used in the service, which must comply with Amtrak requirements, including Wi-Fi accessibility, electronic destination signs, a restroom, and power outlets.

Chapter 10: Marketing

The LOSSAN Agency's efforts to create awareness and generate interest in the Pacific Surfliner service include a broad range of marketing activities from communicating critical rider information and engaging with audiences through various channels to launching new service promotions and working to increase revenue related to key business objectives. The focus of the 2019-20 and FY 2020-21 marketing plan is to support key priorities outlined in the Business Plan, as well as engage in the marketing strategies and programs listed below.

Marketing Strategies

Strengthening the Pacific Surfliner brand

LOSSAN Agency staff will continue to develop and strengthen the Pacific Surfliner brand with efforts that include continuous review of the current brand as it is presented today, as well as customer analysis and qualitative market research. LOSSAN Agency staff will also work to define all aspects of the brand, ultimately developing guidelines for voice and visuals that help support clear and consistent communications across various channels and diverse audiences. Developing and documenting the Pacific Surfliner visual identity and editorial style will help ensure the LOSSAN Agency continues to create compelling campaigns and stories that resonate with audiences while telling a clear and powerful story about the Pacific Surfliner experience and driving intended actions.

Building marketing tools and content

Building a marketing program requires a deep understanding of the Pacific Surfliner audience and their motivations. Conducting market research and mapping out buyer personas will be critical to identifying any potential concerns or questions that prospective passengers may have. Developing tools and content to answer these questions are key not only to boosting awareness, but also to motivating action. Designing reusable content around a clear purpose will help boost marketing productivity.

Passenger communications

The LOSSAN Agency's marketing efforts will include developing offers that address audience concerns and motivations – from sweepstakes and trial promotions to educational tools and interactive content, in order to promote loyalty and engagement. Staff will identify target markets and develop strategic campaigns to drive tangible outcomes (email acquisition, engagement with content, trial usage, promotional redemption). The LOSSAN Agency will also pilot new channels and refine current efforts to more effectively reach existing audiences and new markets while building long-term customer relationships.

Informational messages and critical passenger information regarding service impacts will continue to be regularly communicated to both customers planning trips and passengers in transit via the Pacific Surfliner website, social media accounts, and other relevant channels. These efforts to enhance communication will help increase customer satisfaction.

Public relations

The LOSSAN Agency will develop and implement targeted public relations campaigns to generate featured stories and related publicity in order to boost awareness of the Pacific Surfliner service while enhancing the brand's credibility. In addition to regular press release distributions to print, online and broadcast media, the LOSSAN Agency will work to pitch stories and develop media contacts across industries including transportation and tourism. Efforts will also include working with bloggers and online influencers to promote visibility and awareness of the Pacific Surfliner. In addition to increasing the Pacific Surfliner's overall presence, public relations efforts will utilize media monitoring tools to track coverage and identify opportunities to protect and enhance the Pacific Surfliner brand.

Generating sales referrals to Amtrak.com

One of the key metrics that the LOSSAN Agency uses to help measure the impact of marketing activities on ridership and revenue is Amtrak referral sales reports. These reports track the number of visits to PacificSurfliner.com that ultimately result in successful bookings on Amtrak.com. The LOSSAN Agency uses a combination of broad reach and targeted marketing efforts to ensure that high quality sales leads are directed to PacificSurfliner.com.

Destination marketing

The LOSSAN Agency will continue to expand its destination-based marketing efforts to promote train travel among consumers in market to travel to key destinations along the LOSSAN rail corridor. The LOSSAN Agency continues to build and cultivate partnerships along the Pacific Surfliner route to increase market share and brand awareness in target markets, encouraging more southern California residents and visitors to take the train. Participating in cross-promotional opportunities with strategic partners helps to decrease advertising costs and provides added value for Pacific Surfliner customers.

Marketing Programs

Branding and awareness

Ongoing campaigns will be designed to boost engagement with the Pacific Surfliner brand. General advertising along the corridor is necessary to generate a high number of impressions and create interest in the Pacific Surfliner service while highlighting key selling points, such as scenic views, stress-free travel, the and comfort and convenience of onboard amenities. New marketing channels will be tested to more effectively reach both existing audiences and new markets. Investments will be made made in digital, outdoor, print, and broadcast advertising, as well as partnerships with local sports teams and local visitors bureaus to generate awareness and support traffic back to the PacificSurfliner.com and Amtrak sales channels.

Advertising campaigns and direct marketing

Staff will plan and implement short- and long-term integrated advertising and outreach campaigns to increase market share and strengthen customer relationships. Staff will work with

contracted vendors to identify target markets and develop comprehensive media plans focused on boosting brand awareness and increasing ridership. Regular reporting and data analysis will provide opportunities to refine campaigns to maximize return on marketing investments. This will include a robust marketing effort to support the initiation of additional roundtrips between San Luis Obispo, Los Angeles and San Diego, as well as any other service improvements that are implemented.

New Pacific Surfliner digital platform

A new PacificSurfliner.com digital platform was launched in early 2019, including a new content management system, which will allow future marketing efforts to adapt to changing market conditions while keeping pace with evolving technology and customer expectations.

Many of the bookings on PacificSurfliner.com are assumed to be from new or latent riders, as frequent passengers tend to book directly through Amtrak.com or the Amtrak mobile app. This illustrates that the LOSSAN Agency's marketing efforts are crucial to not only maintain current customers, but also to reach new and distinct markets that present opportunities to grow ridership and revenue. It is especially important to capture new market segments. New passengers on the Pacific Surfliner can then be turned into return customers by Amtrak through its national sales and promotional efforts, retargeting activities using transactional data, and loyalty incentives like Amtrak Guest Rewards that drive customers back to Amtrak points of sale for future trips.

Field marketing engagement

The field marketing engagement program is designed to build awareness of the Pacific Surfliner service while developing and strengthening relationships with local communities. By generating interest and engagement with the Pacific Surfliner service, the program will position the Pacific Surfliner brand as top of mind and drive customers to PacificSurfliner.com and Amtrak points of sale. The program will include investments in sponsorships, memberships, and advertising programs that are coordinated through strategic partnerships with convention and visitors' bureaus, collegiate and professional sports franchises, live event promoters, and local event producers.

Metrics and milestones

As the LOSSAN Agency further develops its marketing program, it is prudent to invest in expanded marketing activities once marketing staff has sufficient insight into which efforts are productive and are able to take action on efforts that need to be refined. In addition to campaign monitoring and reporting, LOSSAN Agency staff will continue to develop analytics to demonstrate return on investment, provide audience insight and help inform future marketing activities. LOSSAN Agency staff will also continue to work with Amtrak to improve reporting in order to better reconcile marketing efforts with Amtrak sales data, and gain insight to optimize future marketing strategies.

Chapter 11: Annual Funding and Separation of Funding

The annual funding process for the three state-supported intercity passenger rail corridors begins with Caltrans DRMT making an initial request for funding to be included in the state's FY budget. Once the state's budget is approved and funds have been included for the service, CalSTA is responsible for allocating the funds to each of the three intercity passenger rail corridors through the approval of the annual business plans. Simultaneously with this process, the LOSSAN Agency will negotiate with Amtrak regarding the operating and maintenance contract, which is managed on a Federal FY (FFY) basis (October – September). The current Amtrak agreement was executed on a biennial basis (covering FFY 2017-18 and FFY 2018-19) to ensure continued and seamless operations at the beginning of each FFY. The biennial agreement is amended to incorporate the second FFY funding amount.

Annually, the LOSSAN Agency will provide a proposed budget for the continued administration, marketing, and operations of the Pacific Surfliner to the LOSSAN Board for review and approval. Consistent with this budget, a funding request will be included in the annual business plan for submittal to the Secretary of CalSTA by April 1 of each year. The LOSSAN Agency will submit the annual business plan including a draft funding request by April 1, 2019, and will submit an updated funding request by June 30, 2019, based on final operating revenue and expense estimates provided by Amtrak.

State funding for operations of all three intercity rail corridors is provided through the Public Transportation Account, which is funded primarily through the state sales tax on diesel fuel.

FFY 2019-20 and FFY 2020-21 Operating Funding Request

The total net State funding request for FY 2019-20 is proposed at \$43,099,148 which includes the net operating subsidy as well as administrative and marketing funding. Total projected net Amtrak operating cost is \$36,220,600. Included in the net operating subsidy is an additional revenue and expense estimate for the implementation of a 13th round trip between San Diego and Los Angeles, a 6th roundtrip between San Diego and Goleta, and a 3rd roundtrip between San Diego and San Luis Obispo. The operating costs and fare revenue also include the retiming of trains which provide peak-period service from Ventura to Santa Barbara. This cost is assumed to be offset by a 50 percent cost share for this service provided by SBCAG. Total Amtrak operating costs are estimated assuming a 4 percent budget assumption increase over the prior year forecast (which is consistent with consumer price index increases and year over year average route cost trends). Total projected fare revenue is estimated using a 2.5 percent budget assumption increase (which assumes the implementation of the additional round trips and is consistent with current year over year trends).

The total net State operating funding request includes \$180,000 for transit connectivity and integration, which includes estimates for the continuation of the transit transfer program (\$60,000), emergency bus bridge service with North County Transit District and the Orange County Transportation Authority (\$60,000), and Live Nation concert train service (\$60,000). The transit transfer proposed budget of \$60,000 will be reduced with the formal approval to use remaining 2015 Transit and Intercity Rail Capital Program (TIRCP) grant funds for the continuance of the program.

The business plan currently assumes that Caltrans DRMT will continue to have a separate agreement with Amtrak to directly fund equipment capital charges for Amtrak-owned railcars and locomotives used on the three state-supported rail corridors. Therefore, equipment capital charges are not included in the operating agreement between Amtrak and the LOSSAN Agency.

Additional supplemental funding is requested for minor projects at \$500,000 consistent with prior year allocations.

FY 2019-20 and FY 2020-21 Administrative and Marketing Funding Request

In addition to the contract costs with Amtrak for the operations and maintenance of equipment for the Pacific Surfliner service, there is an administrative component that is filled by OCTA as the LOSSAN managing agency. The LOSSAN Agency utilizes a small number of key staff positions supported by OCTA staff on an as-needed basis. This way, the LOSSAN Agency and the state receive maximum benefit for the lowest possible cost, and are required to only fund the services and support actually used and needed for the administration of the Pacific Surfliner service.

OCTA continues to provide a host of services through the support function including:

- Audit
- Contracting and Procurement
- Financial Management and Budget
- General Administrative Services
- Human Resources
- Legal
- Marketing
- Operations
- Planning
- Risk Management
- Stakeholder Outreach
- Treasurer-Controller

The FY 2019-20 administrative funding is proposed at \$4,878,548. Included in this amount is \$4,408,398 for managing agency administrative salaries at fully burdened rates. One additional full-time program manager position is requested bringing the total staffing level to 14 full-time positions, plus one part-time extra help position. The annual estimated cost of adding the additional position including managing agency overhead is \$476,645. This amount assumes the managing agency overhead at the current rate, as well as administrative employee performance-based salary increases consistent with OCTA's proposed FY 2019-20 budget and personnel and salary resolution. Since assuming the full administration and management responsibility for the state-funded, Amtrak operated Pacific Surfliner intercity passenger rail service in July 2015, the duties and responsibilities of the LOSSAN Agency have significantly expanded. The additional resource will help further LOSSAN Agency efforts to improve and expand passenger rail service on the LOSSAN rail corridor, as well as ensure the continued effective and efficient management of the state supported Pacific Surfliner service.

The FY 2019-20 proposed funding request for legal, travel, dues and memberships, and banking fees remain consistent with the FY 2018-19 approved budget. The FY 2019-20 proposed funding level for professional services is \$410,000, (an increase of \$210,000 from FY 2018-19 approved amount). This amount includes \$250,000 for fare integration, \$25,000 for audit services, \$10,000 for insurance brokerage services, \$25,000 for state advocacy and \$100,000 for on-call consulting services for planning, modeling, and project management. The FY 2019-20 marketing funding request remains consistent with the FY 2018-19 approved funding level at \$2,000,000. The LOSSAN Agency has been previously approved to use prior year remaining marketing funds. The LOSSAN Agency plans on budgeting approximately \$1.6 million to utilize prior year marketing funds during FY 2019-20.

The LOSSAN Agency's funding request for net Amtrak operating costs and administrative and marketing funding for FY 2019-20 and FY 2020-21 are detailed in Table 11.2.

Table 11.2: LOSSAN Agency Net Operating, Administrative & Marketing Funding Requests: FY 2018-19 Approved, FY 2019-20 and FY 2020-21 Proposed

	FY 2018-19 Approved Funding	FY 2019-20 Proposed Funding	FY 2020-21 Proposed Funding
Amtrak Operating			
Total Amtrak Operating Costs	\$ 115,050,664	\$ 119,652,691	\$ 124,438,798
Total Amtrak Operating Revenue	\$ (88,608,000)	\$ (90,823,200)	\$ (93,093,780)
Net Amtrak Operating Costs (Expenses less Revenues)	\$ 26,442,664	\$ 28,829,491	\$ 31,345,018
LOSSAN Funding Requirement			
Net Amtrak Operating Costs	\$ 26,442,664	\$ 28,829,491	\$ 31,345,018
Net Cost Estimate For Additional Round Trips	\$ 8,065,754	\$ 8,388,384	\$ 8,723,920
Less Cost Sharing Revenue Retimed Trains	\$ (1,177,275)	\$ (1,177,275)	\$ (1,177,275)
Transit Connectivity and Integration	\$ 420,768	\$ 180,000	\$ 180,000
LOSSAN Net Operating Funding Request	\$ 33,751,911	\$ 36,220,600	\$ 39,071,663
Administrative Funding Request	\$ 4,428,904	\$ 4,878,548	\$ 5,073,690
Marketing Funding Request	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
Total LOSSAN Funding Request	\$ 40,180,815	\$ 43,099,148	\$ 46,145,353
Supplemental Allocations			
Minor Projects Funding Request	\$ 500,000	\$ 500,000	\$ 500,000

Grant Programs

Separate from the FY 2019-20 State funding request, grant revenues and expenses are included in the LOSSAN Agency FY 2019-20 annual budget for various operational programs and capital projects. In FY 2015-16, CalSTA awarded the LOSSAN Agency \$1,675,000 million in TIRCP grant funds to support the Pacific Surfliner Transit Transfer Program, which allows Pacific Surfliner passengers to travel more seamlessly to connecting public transit services along the entire Pacific Surfliner route. The LOSSAN Agency began the Pacific Surfliner Transit Transfer Program in the fourth quarter of FY 2015-16 and proposes to use remaining surplus funds in the estimated amount of \$1,400,000 from FY 2018-19 to continue to fund the program in FY 2019-20 and to fund related transit connectivity projects. The LOSSAN Agency will assume continuing the program into FY 2020-21 with the use of future state operating funds.

The LOSSAN Agency has been awarded TIRCP funding that will be utilized for capitalized track maintenance and incentives programs with North County Transit District and Union Pacific Railroad. For FY 2019-20 the amount budgeted is approximately \$2.8 million and for FY 2020-21 the amount budgeted is \$8.1 million. A portion of this program may be supplemented with additional funding sources in future fiscal years as they are identified.

In addition to the TIRCP, the LOSSAN Agency received approximately \$7.2 million in CTSGP funds, for FY 2013-14 through FY 2016-17. These grants funds were allocated to projects for a corridor-wide video surveillance system replacement/upgrades, the construction of a centralized monitoring center for these video feeds, and physical security improvements including the construction of a new law enforcement office at the San Diego Santa Fe Depot. The estimated remaining project funds of \$1,200,000 will be budgeted in FY 2019-20 to complete projects that are already underway.

The LOSSAN Agency was awarded \$3.1 million in FY 2017-18 SRA program funds that will be used for both operational and capital improvements along the corridor. On December 6, 2017, the LOSSAN Agency Board approved projects for the initial distribution and directed staff to coordinate with the LOSSAN Agency TAC to develop a program of projects for future funding. Future year allocation estimates will be updated annually and will fluctuate somewhat with the current price of diesel fuel. For FY 2019-20, the LOSSAN Agency is budgeting \$5.1 million for the funding and the related project expenses.

The FY 2019-20 grant programs budget also includes \$1,500,000 in State Transportation Improvement Program funds for the project approval & environmental document phase of the expansion of the San Luis Obispo Central Coast Layover Facility. The construction phase is estimated to start in FY 2020-21, with \$9.8 million budgeted for this effort.

Budget amendments will be brought to the LOSSAN Agency Board of Directors relating to grant funded projects as necessary depending on the timing of projects and the identification of funding.

Separation of Funding

To ensure state funding for the Pacific Surfliner service is kept separate from funding for OCTA projects and programs, a separation of funding has been established within the LOSSAN managing agency. The funding received from the state is managed through the treasurer and controller of OCTA, as the managing agency. The JPA specifically calls for the treasurer to be the depository of funds and to have custody of all funds of the LOSSAN Agency. The LOSSAN Agency follows OCTA-established policies and procedures that fully comply with the generally accepted accounting principles. The LOSSAN Agency utilizes OCTA's existing accounting system, which is built on a robust platform, and has already established a completely segregated accounting system for LOSSAN Agency-related business. This system and established policies/procedures, overseen by the treasurer and controller, as well as the LOSSAN Finance and Administration Officer, will ensure the preservation of the state's investment and a completely accurate accounting for administration of the Pacific Surfliner service, as well as provide for an accurate and timely reconciliation and return of any surplus funds.

Chapter 12: Government Relations and Legislative Advocacy

One of the benefits gained through local governance of the Pacific Surfliner service by the LOSSAN Agency is added flexibility in advocating for policies at the state and federal level to improve rail operations, increase funding for operations and capital needs, and allow better coordination and interoperability with connecting transit and rail services. In addition, the LOSSAN Agency has the ability to conduct targeted outreach to local governments and community organizations to help expand awareness of the services provided on the LOSSAN rail corridor and more directly respond to local needs.

The key to successful advocacy is the ability to partner with stakeholders to jointly advocate for mutually beneficial policies. The LOSSAN Agency has worked closely with the California Intercity Passenger Rail Leadership Coalition, consisting of the LOSSAN Agency, CCJPA, SJJPA, the CRCC, and RCTC, to jointly advocate for common policy positions.

The LOSSAN Agency will, as practical, attempt to participate in advocacy trips to Sacramento and Washington, D.C., to attend any select committees formed to discuss passenger rail issues, and also participate in the States and Amtrak Intercity Passenger Rail groups. The LOSSAN Agency and Board members will participate in meetings with key legislators representing the LOSSAN rail corridor delegation and Administration officials, allowing for the specific objectives of the LOSSAN Agency to be discussed in detail. These meetings are vital to generating a greater understanding of policy impacts on intercity rail and the need for greater recognition of the importance of the LOSSAN rail corridor in the overall Amtrak system.

The annual legislative program adopted by the LOSSAN Agency Board provides overall guidance to LOSSAN Agency advocacy activities, and staff will continue to provide regular legislative updates and bill analyses to the LOSSAN Agency Board consistent with that program. In reviewing these items, the LOSSAN Agency Board then provides direction on how the LOSSAN Agency is to participate in policy discussions with other stakeholders, and potentially offer testimony as relevant policy discussions take place at the Legislature.

From both a national and state perspective, the LOSSAN rail corridor is underinvested, but could greatly enhance mobility in Southern California with additional funding for capital and operational improvements. Efforts will be made to pursue resources for these improvements as Congress begins its efforts to enact surface transportation reauthorization legislation when the Fixing America's Surface Transportation (FAST) Act expires on September 30, 2020. Specifically, the LOSSAN Agency will work on influencing the federal passenger rail title that provides additional funding and financing opportunities for passenger rail programs. In addition, the LOSSAN agency will work to maximize funding available to benefit the LOSSAN rail corridor in any potential federal infrastructure package and through the continued implementation of California's transportation funding package, SB 1 (Chapter 5, Statutes of 2017).

Staff will continue to provide quarterly legislative updates to the LOSSAN Agency Board on policy and regulatory issues of importance, including those related to the state budget, the FAST Act and other federal funding or financing opportunities, and intercity rail policy matters. It is anticipated that the LOSSAN Agency will be focused on numerous policy issues at the state, federal, and local levels, including:

- Supporting efforts to pursue a stable, recurring source of intercity rail operations and capital funding for LOSSAN Agency-priority projects.
- Supporting efforts to apply for the use of cap-and-trade and SB 1 funding for LOSSAN Agency-priority projects, advocating for intercity rail as an eligible recipient, flexibility in revenue use and a streamlined allocation process.
- Supporting efforts to streamline and enhance transit services that provide for first- and last-mile connections to intercity and high-speed rail passenger rail services and stations.
- Continuing to advocate and educate officials in Sacramento and Washington D.C. regarding the LOSSAN rail corridor and Pacific Surfliner service.

The 2019 LOSSAN Legislative Program provides further detail on the LOSSAN Agency's legislative priorities, and includes three top priorities for 2019:

- Maximize the share of long-term, sustainable funding sources to support passenger rail operations and capital projects in the LOSSAN rail corridor, including funds made available by the federal rail title and ensuring eligibility for the LOSSAN Agency to compete for state funding, such as funding through SB1 and the cap-and-trade program.
- Support efforts to further enhance connectivity of regional rail and local transit services within the LOSSAN rail corridor.
- Continue to study and advance infrastructure and service improvement projects/programs.

At the local level, staff will continue to work with LOSSAN member agencies and local stakeholders to build awareness of passenger rail services along the LOSSAN rail corridor, developing strategic partnerships to better evolve the services to meet local needs. Regular communication and outreach on service improvements and priority projects will foster a better understanding of issues faced along the LOSSAN rail corridor. Increased awareness of these services by local officials can then be leveraged to support consensus-based operational improvements and policy activities.

In addition to the specific priorities identified by the LOSSAN Agency Board, the LOSSAN Agency will continue to monitor policies impacting Amtrak service, including the development of the California HSR project, and commuter rail services in the LOSSAN rail corridor. The need for cohesive policies to allow for integration of rail services within the state, and improved access from other transportation modes, has never been more evident as the state works toward achieving goals related to improved mobility, environmental sustainability, and safety.

Chapter 13: Safety and Security

Protecting the safety and security of our passengers and the passenger rail service on the LOSSAN rail corridor is key to attracting and retaining riders, while also ensuring efficient operations of the Pacific Surfliner service. This chapter addresses safety and security onboard Pacific Surfliner trains, at stations, and along railroad ROW between San Diego, Los Angeles, and San Luis Obispo.

The Pacific Surfliner intercity rail service is operated by Amtrak, and is subject to federal safety standards and regulations in accordance with U.S. Code of Federal Regulations (Title 49, Subtitle B, Chapter II). Responsible regulatory agencies overseeing general railroad safety along the LOSSAN rail corridor include the FRA and the California Public Utilities Commission (CPUC). The FRA Office of Railroad Safety promotes and regulates safety throughout the nation's railroad industry by issuing, implementing, and enforcing railroad safety regulations. The CPUC is the state agency charged with ensuring the safety of freight, intercity, and commuter railroads, as well as highway-railroad crossings in the state. The CPUC performs these railroad safety responsibilities through the Railroad Operations and Safety Branch of the Safety & Enforcement Division. The Transportation Security Administration (TSA) also plays a role in the security of passenger rail service through the TSA-sponsored Visible Intermodal Prevention and Response program.

Operational, track, and other safety inspections are completed through a coordinated review among rail operators and owners, including Amtrak, Metrolink, NCTD, UPRR, BNSF, CPUC, and FRA for federal and state compliance. The LOSSAN Agency coordinates with these agencies to ensure that all reporting requirements are fulfilled at the federal and state levels. Amtrak is responsible for all required reporting of Pacific Surfliner safety data to federal, state, and local agencies, including the FRA and CPUC.

A key objective of the LOSSAN Agency safety program is to instill a comprehensive safety culture that governs all of the activities associated with the operations and maintenance of the Pacific Surfliner service, while efficiently meeting operational performance goals. The LOSSAN Agency will continue to work with Amtrak and host railroads to ensure a detailed system safety and security program is in place to protect Pacific Surfliner passengers and crew, as well as the general public.

As part of this effort, the LOSSAN Agency will continue to:

- Assess ongoing rail safety and security awareness efforts to identify areas for improvement
- Work with host railroads to identify "hot spots" for trespassing and vehicle strikes
- Develop outreach programs that meet the needs of the public, as well as stakeholders
- Work with Amtrak and stakeholders to ensure a continued safety culture for all who work and travel on Pacific Surfliner trains and utilize Pacific Surfliner stations
- Work with local jurisdictions and host railroads to ensure that rail capital projects include a goal of improved safety and security wherever possible
- Work with host railroads and rail operators to coordinate training with local first responders to help expedite emergency response and accident investigation in the event of an incident

- Support Operation Lifesaver, a national rail safety program with the goal of improving public awareness of safety around railroad tracks
- Seek out and leverage state and federal grant funds for safety and security improvements

Positive Train Control

In accordance with a federal mandate, Positive Train Control (PTC) was fully operational on all Pacific Surfliner trains effective December 31, 2018. PTC is a predictive collision avoidance technology designed to stop a train in motion when its continued movement may result in an accident. The safety enhancing goals of PTC include preventing train-to-train collisions, speeding and over-speed derailments, incursions into track work zones, and movement of a train through a switch left in the wrong position. The primary benefits of PTC include saving the lives of train crews, passengers, and railroad workers, improving passenger and freight train operational efficiency, and providing real-time train location information.

Safety and Security Onboard Trains

The LOSSAN Agency primarily serves in an oversight and coordination role with regard to safety and security onboard trains, relying on the extensive onboard safety and security programs and policies already put in place by Amtrak. LOSSAN Agency staff will continue to attend regularly-scheduled safety meetings hosted by Amtrak for front-line employees, to reiterate that safety is the first priority in delivering Pacific Surfliner service.

All Pacific Surfliner cab cars and locomotives are currently equipped with a “forward facing” camera system to help aid in accident investigation. This provides crews and first responders with a valuable tool to assist with post-incident investigation, and can help to clear an incident scene more quickly so that trains can proceed. In addition, Amtrak is working to install inward-facing cameras on locomotives and cab cars nationwide, similar to those currently used by Metrolink. The new Charger locomotives currently in service are equipped with inward-facing cameras.

Amtrak Police Department

Pacific Surfliner passengers benefit from the existing Amtrak security program, specifically the services of the Amtrak Police Department. There are nine officers, one detective, one sergeant, and one captain currently assigned to the Pacific Surfliner. Of the nine officers, six function in the patrol capacity, and three serve with K-9 units. Additionally, there are five members of the Amtrak Special Operations Unit (SOU) that can be called upon when needed.

The Patrol Officers fulfill traditional policing functions. Their job is to act as a deterrent to crime in stations, on trains, in and around Amtrak facilities, and out on the railroad ROW. They enforce the law, perform checked baggage screening and onboard security checks, conduct follow-up investigations on any crimes involving Amtrak facilities or its passengers, and provide support during special events.

The K-9 units provide a psychological and physical deterrent to potential threats from explosives. The teams undergo intensive training that includes vapor wake training, which allows the K-9

units to be alert to the scents of explosives left in the wake of passing individuals, not just those found in stationary baggage.

The members of the SOU support patrol operations by providing rapid response and enhanced capabilities to assist in keeping Amtrak passengers and employees safe. Although not exclusively assigned to the Pacific Surfliner, the SOU is prepared at any time to deploy personnel and equipment for tactical response, conduct low-visibility counter-surveillance, investigations, and provide enhanced support for special events. The SOU also conducts training on railroad-specific tactical response and procedures for fellow Amtrak Police Department members and external law enforcement partner agencies.

Safety on the Tracks

Safety incidents along the railroad ROW can include injuries and fatalities associated with incidents at grade crossings and trespassing on railroad property. Projects that improve safety include track and signal upgrades, gate and warning systems, and grade separations that eliminate at-grade crossings. In addition, safety can be improved through use of public awareness campaigns designed to educate the public about the risks of trespassing on railroad property and the importance of using caution around railroad tracks and trains.

Safety at Stations

The LOSSAN Agency primarily serves in an oversight, coordination, and funding role with regard to the safety and security of the various station facilities that exist along the LOSSAN rail corridor. The LOSSAN Agency is a recipient of CalOES CTSGP funds and takes the lead in coordinating eligible capital improvements that increase safety and security at passenger and maintenance facilities.

In calendar year 2018 the LOSSAN Agency, in partnership with Amtrak, advanced a number of safety and security improvements utilizing CalOES funding. These on-going projects include:

- The upgrade of existing video surveillance systems (VSS) at six Pacific Surfliner stations on the LOSSAN rail corridor where the existing equipment no longer operates reliably
- The installation of new VSS at six Pacific Surfliner stations on the LOSSAN rail corridor where no equipment currently exists
- The construction of a centralized video monitoring station at Amtrak's Los Angeles maintenance facility

Most of the stations along the LOSSAN rail corridor are outfitted with security cameras that feed directly to a local sheriff's office or operations center that can dispatch emergency services. Some city-owned stations also offer security guards and long-term parking security. However, the ongoing CalOES funded improvements will allow all VSS along the LOSSAN rail corridor to be monitored in one central location. Additional projects that will enhance the safety and security of the service are planned for implementation during FY 2019-20 and 2020-21.

LOSSAN Rail Corridor Safety Coordination and Emergency Response

The LOSSAN Agency coordinates safety and security activities with various stakeholders, and ROW owners along the corridor including: the state, LOSSAN member agencies, Amtrak, UPRR, BNSF, Metrolink, NCTD, Operation Lifesaver, Department of Homeland Security, and first responders along the LOSSAN rail corridor.

The LOSSAN Agency is continuing to pursue new agreements with local transit providers for emergency bus bridge service, similar to the one recently implemented with OCTA, as well as the creation of standard operating procedures to address service disruptions. Currently, Metrolink and NCTD coordinate with local transit agencies to provide bus bridges when emergency incidents occur. In addition, Amtrak, Metrolink, and NCTD often transport each other's passengers in the event of an incident on the tracks.

Public Awareness and Outreach

Public information efforts will continue to use both traditional methods and social media to build awareness about vehicular, bicycle, and pedestrian safety around the tracks. The LOSSAN Agency works with Operation Lifesaver to implement rail safety marketing and outreach campaigns that promote safe behavior around the tracks used by the Pacific Surfliner.

Operation Lifesaver is a national rail safety coalition to prevent collisions, injuries, and fatalities on and around railroad tracks and highway-rail at grade crossings. It is comprised of a voluntary effort by railroads, safety experts, law enforcement, public agencies, and the general public. Several LOSSAN member agencies and partners currently participate in Operation Lifesaver activities by implementing safety awareness campaigns and providing rail safety education. The LOSSAN Agency will work to further expand its participation in the program, in order to increase the reach of Operation Lifesaver's rail safety message.

Chapter 14: Emerging Corridors

In addition to managing the Pacific Surfliner rail service, the LOSSAN Agency works with member agencies to study corridor enhancements and expansion opportunities that provide connectivity within Southern California and beyond. In addition to the ongoing coordination with the development of the California HSR system (see Chapter 7), the LOSSAN Agency's focus has been on coordinating connectivity with two developing or emerging corridors; 1) the Coast Corridor, connecting the coastal communities up to San Luis Obispo and further north to the Bay Area and 2) the Coachella Valley – San Geronio Pass Rail Service, connecting the eastern communities throughout Riverside County and Coachella Valley. These connections will provide seamless travel opportunities by rail throughout the region and state. System improvements on existing and emerging rail corridors will contribute to the success of the LOSSAN rail corridor, support future statewide and regional rail operations, and provide enhanced connectivity with local transit systems.

Figure 14.1: Emerging Corridors



Source: LOSSAN Agency, 2017

The Coast Corridor (“Coast Daylight” Service)

The 474-mile Coast Corridor, which runs from San Francisco to Los Angeles, shown in Figure 14.1, currently serves a full complement of urban commuters, as well as regional, intercity, and interstate travelers. Constructed by the Southern Pacific Railroad between the late 19th and early 20th centuries, the Coast Corridor was originally built as a passenger line to transport passengers along the nearly 500 miles between San Francisco and Los Angeles.

Current passenger rail services that operate on segments of the Coast Corridor include Caltrain, Amtrak, and Metrolink. Freight rail services are operated by UPRR, which carries two to four trains per day north of Oxnard and eight to 16 trains per day in the San Fernando Valley. For the UPRR, the Coast Rail Line is considered a “secondary” or “relief” line to the much busier Central Valley Line to the east, which connects Northern and Southern California via the Central Valley.

The “Coast Daylight” service is a proposed extension of the current intercity and long-distance service on the LOSSAN rail corridor north of San Luis Obispo to San Jose and San Francisco. This proposed service would fill a gap in passenger rail services between Northern and Southern California.

The Amtrak Coast Starlight is a daily long-distance train operating through the Coast Corridor that serves the needs of long-distance travelers between Seattle, the San Francisco Bay Area, and Los Angeles. Ultimately, the Coast Daylight service would originate and terminate in San Francisco and would be scheduled to complement the Coast Starlight schedule with a reliable intercity service to meet the needs of communities between the San Francisco Bay Area and Los Angeles.

The CRCC consists of a technical and policy committee made up of staff and elected officials representing coastal agencies supporting the service, which includes VCTC, SBCAG, SLOCOG, Santa Cruz County Regional Transportation Commission (SCCRTC), and the Transportation Agency for Monterey County (TAMC). The LOSSAN Agency is a participating agency of the CRCC and works with the CRCC member agencies and the State to help evaluate the options for the proposed Coast Daylight service, including feasibility, funding, ridership, cost projections, and host railroad negotiations.

Several actions are needed to advance Coast Daylight project, in priority order:

1. Secure track access from host railroads
2. Secure state operating support
3. Secure equipment
4. Secure legislative authority to administer the service

With respect to Coast Daylight services, the LOSSAN Agency business plan includes adequate staff resources to monitor and participate in continued planning efforts led by CRCC staff.

Coachella Valley – San Gorgonio Pass Rail Service

The Coachella Valley – San Gorgonio Pass Rail Corridor refers to the 140-mile long corridor between Los Angeles and the City of Indio as illustrated in Figure 14.1. RCTC is in the early stages of preparing a program-level Environmental Impact Statement/Environmental Impact Report for intercity rail service in this corridor. This service would be similar to the Pacific Surfliner service, providing intercity rail service that would operate through a wide variety of settings from the heavily-urbanized areas of Los Angeles and Orange Counties to the less-populated, but rapidly growing areas of eastern Riverside County.

The only passenger rail service currently operating in the corridor between Los Angeles and the Coachella Valley is Amtrak's Sunset Limited, a long-distance train that operates three times per week between Los Angeles and New Orleans, with a stop in Palm Springs during overnight hours. There is significant travel demand based on current travel patterns along nearby freeways. The ridership potential is also demonstrated regionally by the growth in Metrolink ridership, and locally by the increase in Amtrak Thruway Bus Route 39 ridership between Fullerton, Palm Springs, and Indio. The eastern portion of the corridor is one of the fastest-growing areas of Southern California due to increasing residential development, and has experienced a doubling of population between 1990 and 2010, a trend that is expected to continue. In addition, the Coachella Valley has a large number of tourist destinations that attract regional trips from Los Angeles and Orange counties, as well as national and international visitors.

The Coachella Valley – San Gorgonio Pass Rail Corridor's existing travel market is substantial, with 1.5 billion total annual two-way person trips (all modes) in 2000, and projections for more than 300 million additional trips by 2030, and another 100 million trips by 2040 (1.82 billion total).

In 2018, a draft service development plan (SDP) for the corridor was completed and included development of a work plan, outreach efforts, alternatives analysis, market analysis, and ridership projections. The program-level environmental analysis that is currently underway, along with finalizing the SDP, is anticipated to take an additional three years to complete. Once these planning efforts are finished, the corridor will be eligible to receive state and federal funds for design and construction. The LOSSAN Agency will continue to participate in these planning efforts and ensure they provide connectivity with the Pacific Surfliner service.

Summary

Moving forward, the LOSSAN Agency will continue to work with member agencies to participate in planning efforts for passenger rail service in these emerging corridors, with a focus on creating seamless connections between the Pacific Surfliner and future passenger rail services on the Coast Daylight and Coachella Valley corridors.



February 20, 2019

To: Members of the Board of Directors

From: Jennifer L. Bergener, Managing Director

Subject: Pacific Surfliner Marketing Update

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency is responsible for marketing the Pacific Surfliner service and setting an annual work plan to enhance public awareness of the service and increase ridership and revenue. A marketing update is presented to the Board of Directors each quarter. This report provides a summary of marketing activities and performance through January 2019.

Recommendation

Receive and file as an information item.

Background

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency's (Agency) efforts to create awareness and generate interest in the Pacific Surfliner service include a broad range of marketing activities from communicating critical rider information and engaging with audiences through various channels to launching new service promotions and working to increase revenue related to key business objectives.

The current marketing program is outlined in the LOSSAN Agency's Fiscal Year (FY) 2018-19 and 2019-20 Annual Business Plan (Business Plan). The marketing program is fully funded by the state and is planned to be \$2 million annually. The focus of the FY 2018-19 marketing efforts are to support key priorities outlined in the Business Plan, as well as engage in the marketing strategies and programs designed to help grow awareness, ridership, and revenue.

Marketing staff focuses on promoting Pacific Surfliner ridership by developing and implementing an array of marketing programs designed to strengthen the Pacific Surfliner brand, build a strong online presence, improve the customer experience, add value for passengers, and leverage strategic partnerships.

Discussion

Performance Summary

In late 2015, the PacificSurfliner.com website was launched to provide both current and prospective riders with a more relevant online experience, to better engage audiences along the corridor, and attract new riders. The website captures relevant data about visitors and directs them to Amtrak points of sale to complete the ticketing process. One of the key metrics that the LOSSAN Agency uses to help measure the impact of marketing activities on ridership and revenue is Amtrak referral sales reports. These reports track the number of visits to PacificSurfliner.com that ultimately result in successful bookings on Amtrak.com.

In 2018, Amtrak reported a consistent increase in sales and revenue from leads generated by PacificSurfliner.com – a positive indicator that passengers are booking tickets as a direct result of engaging with the LOSSAN Agency's marketing efforts and visiting PacificSurfliner.com. Amtrak reports that the Pacific Surfliner website drove approximately 530,000 qualified sales leads to Amtrak.com in 2018, resulting in 55,737 bookings and \$3,707,677 in revenue. Due to a data processing issue, referral sales tracking date is not available for January and February 2018.

				
Unique visits to PacificSurfliner.com	Referral traffic to Amtrak.com	Bookings on Amtrak.com	Revenue	
2018 TOTAL	1,447,232	530,370	55,737	\$3,707,677

Sales referrals from PacificSurfliner.com represents only a portion of overall ticket sales, as passengers are encouraged to use a variety of channels to purchase tickets including going directly to the Amtrak.com website and the Amtrak mobile app. Currently, sales reporting is not available for direct bookings on Amtrak.com, the Amtrak app, via phone, or in station.

Year-Over-Year Performance

Amtrak reports an average 95 percent increase in revenue in 2018 over the previous year from PacificSurfliner.com sales referrals generated by the LOSSAN Agency's marketing efforts.

While there have been fluctuations in overall Pacific Surfliner ridership and revenue year-over-year, the number of sales leads delivered to Amtrak.com continues to consistently increase, demonstrating that people are buying tickets as a direct result of visiting PacificSurfliner.com. Approximately 1 in every 10 customers who arrived at Amtrak.com after visiting PacificSurfliner.com completed a booking, resulting in a 10 percent conversion rate, which exceeds industry benchmarks.

The LOSSAN Agency uses a combination of broad reach and targeted marketing efforts to ensure that high-quality sales leads are directed to PacificSurfliner.com. As the Pacific Surfliner marketing program continues to grow and diversify, the LOSSAN Agency will continue to work to increase the volume of website traffic to PacificSurfliner.com, as well as a high ratio of bookings to referrals.

Many of the bookings on PacificSurfliner.com are assumed to be from new or latent riders, as most regular passengers tend to book directly through Amtrak.com or the Amtrak mobile app. This illustrates that the LOSSAN Agency's marketing efforts are crucial to not only maintain current customers, but also to reach new and distinct markets that present opportunities to grow ridership and revenue. It is especially important to capture new market segments. New passengers on the Pacific Surfliner can then be turned into lifelong customers by Amtrak through its national sales and promotional efforts, retargeting activities using transactional data, and loyalty incentives like Amtrak Guest Rewards that drive customers back to Amtrak points of sale for future ticketing.

Sales referrals continue to be an important metric to monitor, as data on direct bookings on Amtrak.com and the Amtrak mobile app is currently not available. LOSSAN Agency staff continues to work with Amtrak to refine reporting and insights.

(Note: Referral sales tracking data is not available between October 2017 and February 2018 from Amtrak.com due to data processing issue.)

Always-On Advertising Campaigns

The LOSSAN Agency drives valuable traffic to the Pacific Surfliner website consistently throughout the year through always-on advertising strategies focused on keeping the Pacific Surfliner top of mind, while continuing to drive sales referrals to Amtrak.com for ticketing. Strong performance from digital advertising campaigns drives website traffic and sales in a relatively consistent way throughout the year, allowing LOSSAN Agency staff to leverage historical

performance data to constantly refine audience targets and bidding strategies to maximize efficiency and increase return on investment.

Advertising campaigns are designed to utilize specific tactics to drive awareness of the Pacific Surfliner service and then engage prospective customers through the purchase consideration process. Finally, qualified users who have a high awareness of the Pacific Surfliner service can then take action and convert their interest into a booking transaction.

Different marketing strategies and advertising channels are used at various stages of the customer journey, starting with broad awareness of the Pacific Surfliner service through nurturing prospective customers through the purchasing decision.



Awareness: Digital display advertising on both mobile and desktop devices help drive awareness of the Pacific Surfliner service.

Consideration: Social media campaigns can target users geographically, behaviorally, and demographically driving engagement and nurturing consideration through targeted content and relevant information.

Conversion: Paid search advertising captures users who have a high awareness of the Pacific Surfliner service and a high propensity to complete a purchase.

Promotions

In February 2019, the LOSSAN Agency launched a ridership campaign to promote mid-week travel on the Pacific Surfliner. The offer includes a 50 percent discount on a companion fare, which gives audiences a compelling incentive to travel between Mondays and Thursdays when Pacific Surfliner trains typically have more seating capacity. The integrated media campaign will build off of the Hug the Coast theme from 2018, which had a very positive reception by partners,

media, and consumer response measured through online activity and engagement.

Partnerships

The LOSSAN Agency continues to build and cultivate partnerships to increase market share and brand awareness in target markets, driving key audiences to take the train. Participating in cross-promotional opportunities with strategic partners helps to decrease advertising costs and provide added value for Pacific Surfliner customers.

Pacific Surfliner Game of the Week

In January 2019, the LOSSAN Agency launched a new partnership with KDOC-TV to promote awareness of the Pacific Surfliner service in targeted regional markets. The sponsorship affords the LOSSAN Agency unique presenting status of the “Pacific Surfliner Game of the Week” broadcast, a live and locally produced sports program featuring high school and college teams. In addition to providing extensive high-value commercial placements across the KDOC-TV broadcast schedule, this unique media partnership demonstrates a positive affiliation with local communities through support of Southern California student athletes and schools. The partnership provides a valuable opportunity for the Pacific Surfliner to build its brand awareness by leveraging the Orange County and Los Angeles reach of KDOC-TV as well as the television station’s established legacy and unique status in Southern California.

Sponsorship with 2019 Big West Conference

The LOSSAN Agency has partnered with the 2019 Big West Conference (BWC) to promote awareness of the Pacific Surfliner service and the everyday student discount program in targeted regional markets. The BWC provides the opportunity to engage directly with college sports fans as well as the students and families affiliated with BWC member institutions including California State University, Fullerton; University of California, Santa Barbara; University of California, Irvine; California Polytechnic State University – San Luis Obispo; and University of California, San Diego. Last March, the LOSSAN Agency sponsored the BWC Basketball Tournament at the Honda Center, which is located across the street from the Anaheim Regional Transportation Intermodal Center, providing easy access to Pacific Surfliner service. This year’s sponsorship will continue to grow our college marketing efforts with expanded elements promoting visibility throughout the conference leading up to the BWC Basketball Tournament in March, including placements on Fox Sports broadcasts, in-venue visibility at the Honda Center and local

campus venues, college athletic websites and social channels, and in-game activations designed to promote the Pacific Surfliner service.

California Everyday Discounts for Veterans

Launched January 7, 2018, the California Everyday Discounts program is designed to preserve ongoing savings that were reduced or eliminated by Amtrak on a national level. In February 2019, the LOSSAN Agency reinstated a 15 percent everyday fare discount for U.S. Veterans. The offer discount was developed in coordination with the state's two other intercity passenger rail services, the Capitol Corridor and the San Joaquins, to maintain the best possible fares for passengers who have come to rely on year-round discounts.

Summary

A summary of marketing activities and performance through January 2019 is provided. Recent marketing efforts include always-on advertising campaigns and promotions designed to strengthen the Pacific Surfliner brand, build a strong online presence, improve customer experience, and offer added value for passengers. Amtrak continues to report a consistent increase in sales and revenue from bookings generated by the PacificSurfliner.com website – a positive indicator that passengers are booking tickets as a direct result of engaging with the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's marketing efforts.

Attachment

None.

Prepared by:



Emilia Doerr
Marketing & Communications Officer
714-560-5370



Pacific Surfliner Marketing Update

Board of Directors
February 20, 2019

Performance Summary

In 2018, Amtrak reported a consistent increase in sales and revenue generated by PacificSurfliner.com.

- ~530,000 qualified sales leads delivered to Amtrak.com in 2018*, resulting in \$3.7 million in revenue from PacificSurfliner.com sales referrals



Unique visits to
PacificSurfliner.com



Referral traffic to
Amtrak.com



Bookings on
Amtrak.com



Revenue

2018 TOTAL	1,447,232	530,370	55,737	\$3,707,677
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Note: Currently, sales reporting is not available for direct bookings on Amtrak.com, the Amtrak app, via phone, or in the stations.

**Referral sales tracking data is not available between January 2018 and February 2018 from Amtrak.com due to data processing issue*

Year-Over-Year Performance

Amtrak reports a **95 percent** increase in referral sales revenue from PacificSurfliner.com for in 2018, compared to the same period the previous year.

- Positive indicator people are engaging with our marketing efforts and booking tickets through Pacific Surfliner website
- On average, 1 in every 10 customers completed a booking on Amtrak.com after visiting the Pacific Surfliner site.

Always-On Campaigns

Keeps Pacific Surfliner top of mind and continues to drive sales referrals to Amtrak.com for ticketing.

AWARENESS



Online & Mobile Display

CONSIDERATION



Social Media Advertising

CONVERSION



Paid Search

Driving Awareness



Digital display advertising on both mobile and desktop devices help drive awareness for the Pacific Surfliner service.

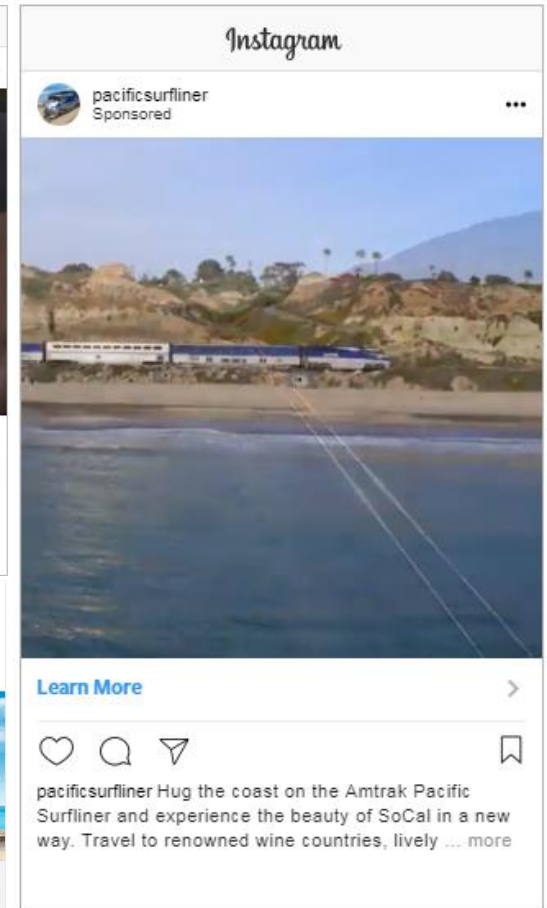
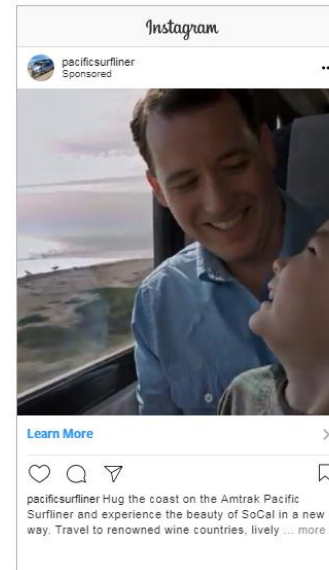
- Drives large volume of impressions and high visibility to targeted audiences
- Directs users to website for more information about the Pacific Surfliner



Driving Consideration



Social media campaigns can target users geographically, behaviorally, and demographically driving engagement and nurturing consideration through targeted content and relevant information.



Driving Conversions



Paid search advertising captures users who have a high awareness of the Pacific Surfliner service and a high propensity to complete a purchase.

Through audience targeting and a variety of bidding strategies, paid search is a cost-effective way to reach individuals who are in-market for travel and still considering their options.

Amtrak® Pacific Surfliner® | Hug the Coast with Us

[Ad](#) www.pacificsurfliner.com

351 miles of cityscapes, beaches & mountains are calling. Let us take you there.

Amtrak Pacific Surfliner | Everyday Discounts

[Ad](#) www.pacificsurfliner.com

Hug The Coast With Us. Explore Options And Prices.
[Everyday Discounts](#)

[Plan Your Trip](#)

[Watch a Video](#)

[See What's New](#)

Companion Fare Promotion

In February 2019, the LOSSAN Agency will launch a ridership campaign to promote mid-week travel on the Pacific Surfliner. The fare promotion is designed to promote travel on the Pacific Surfliner during mid-week periods.

Offer details: Buy one full-fare adult ticket and book a second fare with a 50 percent discount.

Valid for travel between Mondays and Thursdays only

Timeline: Valid through May 31



Pacific Surfliner Game of the Week

- New partnership with KDOC-TV launched January 2019
- Promote awareness of the Pacific Surfliner service in targeted regional markets
- Live and locally produced sports program featuring high school / college teams
- Unique media partnership demonstrates positive affiliation with local communities through support of Southern California student athletes and schools



Pacific Surfliner Game of the Week



[Video] Valuable opportunity for the Pacific Surfliner to build its brand awareness by leveraging the Orange County and Los Angeles reach of KDOC-TV

Big West Conference

Partnership promotes:

- Visibility of California Everyday Discount for Students
- Visibility at college campus venues along the Pacific Surfliner route
- Sponsorship of the Big West Conference Tournament in March at the Honda Center

Amtrak Pacific Surfliner will be at the forefront during March Madness whether the tournament is being watched in person or on television





California Everyday Discounts for U.S. Veterans

- In 2018, the LOSSAN Agency introduced the California Everyday Discounts program to preserve ongoing savings that were recently reduced or eliminated by Amtrak on a national level.
- In February 2019, LOSSAN Agency reinstated a 15 percent fare discount for U.S. Veterans
- Goal: Maintain the best possible fares for Pacific Surfliner passengers who have come to rely on year-round discounts



Looking Ahead

- Rail Safety Month
- October Schedule Change
- PacificSurfliner.com Refresh
- Disneyland Resort Partnership
- Anaheim Ducks Sponsorship
- New Locomotives
- 2019 Ridership Campaign