MEETING NOTICE AND AGENDA

LOSSAN RAIL CORRIDOR AGENCY
JOINT POWERS BOARD

The Board may take action on any item appearing on this agenda.

Wednesday, November 16, 2011
11:30 a.m. to 1:30 p.m.

William Mulholland Room, 15th Floor
LA Metro
One Gateway Center
Los Angeles, CA
Lunch Provided

Alternative Locations:
SBCAG
260 N San Antonio Rd
Suite B
Santa Barbara, CA

Caltrans DOR
1120 N Street
Sacramento, CA

HNTB
Suite 400
610 Crescent Exec Ct
Lake Mary, FL

AECOM
2101 Wilson Blvd
8th Floor
Arlington, VA

SANDAG Staff Contact: Linda Culp
(619) 699-6957
lcu@sandag.org

AGENDA HIGHLIGHTS

• LOSSAN CORRIDORWIDE BUSINESS CASE
• LOSSAN CORRIDORWIDE GOVERNANCE INITIATIVES
• PACIFIC SURFLINER EXPRESS SERVICE PROGRESS REPORT

www.lossan.org
<table>
<thead>
<tr>
<th>ITEM #</th>
<th>TAC RECOMMENDATION</th>
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<tbody>
<tr>
<td>1.</td>
<td>CHAIR’S REPORT</td>
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<td>Welcome and Introductions</td>
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<td>2.</td>
<td>PUBLIC COMMENT AND COMMUNICATIONS</td>
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<td>Speakers are limited to three minutes each.</td>
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**CONSENT (3 through 5)**

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<tr>
<td>+3.</td>
<td>OCTOBER 26, 2011, MEETING MINUTES (Danny Veeh, SANDAG) (pp. 7-17)</td>
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<td>APPROVE</td>
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<td>The meeting minutes are included for approval.</td>
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<td>+4.</td>
<td>CORRIDOR TRENDS (Danny Veeh, SANDAG) (pp. 18-25)</td>
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<td>INFORMATION</td>
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<td>The latest corridor statistics, including ridership and revenue statistics and customer satisfaction indices, are attached. An update on the San Diego-Los Angeles Limited Stop Express Service is included.</td>
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<td>+5.</td>
<td>CORRIDOR MARKETING UPDATE (Linda Culp, SANDAG) (pp. 26-28)</td>
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<td>A summary of the September 1, 2011, meeting of the marketing, communications, and planning staffs from the LOSSAN corridor agencies are included.</td>
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**REPORTS (6 through 12)**

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<tr>
<td>+6.</td>
<td>RESOLUTION OF APPROVAL OF FINAL CHANGES TO JOINT EXERCISE OF POWERS AGREEMENT (Linda Culp, SANDAG) (pp. 29-30)</td>
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<tr>
<td></td>
<td>APPROVE</td>
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<td></td>
<td>All member agencies have approved the proposed change to the LOSSAN Joint Exercise of Powers Agreement to add the Riverside County Transportation Commission as an ex-officio member of the Board. The Board of Directors is asked to approve a resolution to approve this change and direct staff to transmit these documents to the Secretary of State.</td>
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<td>+7.</td>
<td>LOSSAN CORRIDORWIDE STRATEGIC IMPLEMENTATION PLAN (Gene Skoropowski, HNTB) (pp. 31-34)</td>
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<td></td>
<td>DISCUSSION</td>
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<td>Project Management staff will provide an update on progress to date.</td>
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7A. LOSSAN CORRIDORWIDE BUSINESS CASE (Michael Litschi, OCTA; James Campbell, PB; Bruce Williams, AECOM)  

The working group of Technical Advisory Committee (TAC) members continues to meet regularly to complete the corridorwide business case for new services. At the Board’s October 26, 2011, meeting, operations modeling results for the 2030 service plan were reviewed. Staff will present the ridership forecasting results for the 2030 service plan at this meeting.

7B. LOSSAN CORRIDORWIDE GOVERNANCE INITIATIVES (Corridor CEOs)  

The Chief Executive Officers continue to discuss the details of local authority for state-supported intercity passenger rail services in the corridor. Additional details on the overall management plan for the local authority and an update on the draft legislative work will be provided at the meeting.

7C. STATUS REPORT ON LOSSAN CORRIDORWIDE SHORT-TERM IMPROVEMENTS (Gene Skoropowski, HNTB) (pp. 35-55)  

An update on the progress of completing the short-term service improvements is provided.

8. UPDATE ON THE RAIL2RAIL PROGRAM  
(Mark Waier, Metrolink; Patrick Merrill, Amtrak) (pp. 56-57)  

The Metrolink/Amtrak/Caltrans Rail2Rail program allows Metrolink monthly pass holders and Amtrak passengers to ride both services within Metrolink territory. Amtrak recently completed a standee survey to document overcrowding issues due to the success of the program. Metrolink, Amtrak, and Caltrans management has reviewed this document as well as discussed possible options for moving forward. The TAC discussed this item at its November 3, 2011, meeting. A summary of that discussion is included. Staff will provide an update on agency discussions.

9. PACIFIC SURFLINER EXPRESS SERVICE PROGRESS REPORT  
(Pat Merrill, Amtrak) (pp. 58-62)  

Amtrak and Caltrans launched the Pacific Surfliner Express Service on February 15, 2011, converting Train 565 between San Diego and Los Angeles to Train 563 with intermediate stops at Solana Beach, Oceanside, Irvine, and Anaheim. Amtrak has completed a six-month assessment of the service. The TAC discussed this report at its October 13, 2011, meeting.
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<th>ITEM #</th>
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<td>10.</td>
<td>STATUS OF THE LOSSAN NORTH PROGRAMMATIC ENVIRONMENTAL IMPACT REPORT/ ENVIRONMENTAL IMPACT STATEMENT AND SERVICE DEVELOPMENT PLAN (SDP) (Bill Bronte, Caltrans)</td>
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Division of Rail continues to work with District 5 to prepare a program-level environmental document and SDP for the Los Angeles to San Luis Obispo segment of the corridor, a key requirement for requesting federal rail capital funds. Staff will provide an update on the status of this document.

+11. 2012 MEETING CALENDAR (Linda Culp, SANDAG) (pp. 63-64)  

The Board is asked to approve the proposed 2012 Board of Directors and TAC meeting calendar.

12. BOARD MEMBER UPDATES  

INFORMATION

13. NEXT MEETING  

INFORMATION

The next Board of Directors meeting is scheduled for Wednesday, December 14, 2011, at LA Metro beginning at 11:30 a.m.

+ next to an item indicates an attachment
# 2011 Board of Directors

<table>
<thead>
<tr>
<th>County</th>
<th>Members</th>
<th>Alternates</th>
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<tbody>
<tr>
<td>San Luis Obispo</td>
<td>Fred Strong Council Member, City of Paso Robles Member, San Luis Obispo Council of Governments</td>
<td>Jan Howell Marx Mayor, City of San Luis Obispo Member, San Luis Obispo Council of Governments</td>
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<td>John P. Shoals Mayor and Chair, City of Grover Beach Member, San Luis Obispo Council of Governments</td>
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<td>Santa Barbara:</td>
<td>Salud Carbajal Supervisor, County of Santa Barbara Member, Santa Barbara County Association of Governments</td>
<td>Helene Schneider Mayor, City of Santa Barbara Member, Santa Barbara County Association of Governments</td>
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<td>Ventura:</td>
<td>Keith Millhouse Mayor Pro Tem, City of Moorpark Member, Ventura County Transportation Commission</td>
<td>Brian Humphrey Member, Ventura County Transportation Commission</td>
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<td>Los Angeles:</td>
<td>Jacki Bacharach (Vice Chair) Representative, Los Angeles County Metropolitan Transportation Authority</td>
<td>Karen Heit Representative, Los Angeles County Metropolitan Transportation Authority</td>
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<td>Diane DuBois Vice Mayor, City of Lakewood Member, Los Angeles County Metropolitan Transportation Authority</td>
<td>Beatrice Proo Representative, Los Angeles County Metropolitan Transportation Authority</td>
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<tr>
<td>Orange:</td>
<td>Arthur Brown Representative, Orange County Transportation Authority</td>
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<td>Jerry Amante Mayor, City of Tustin Member, Orange County Transportation Authority</td>
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## San Diego:

| 2 votes | Jerome Stocks | Deputy Mayor,  
City of Encinitas  
Member,  
North County Transit District | Dave Roberts | Council Member,  
City of Solana Beach  
Member,  
North County Transit District |
|---------|---------------|---------------------------------|---------------|---------------------------------|
|         | Julianne Nygaard | Advisory Representative,  
North County Transit District |               |                                  |
|         | Jerry Rindone | Member,  
San Diego County Board of Education  
Representative,  
San Diego Metropolitan Transit System | Harry Mathis | Chair,  
Metropolitan Transit System  
Member,  
San Diego Metropolitan Transit System |
|         | Joe Kellejian (Chair) | Deputy Mayor,  
City of Solana Beach  
Representative,  
San Diego Association of Governments |               |                                  |

## Caltrans:

| 1 vote | Bill Bronte | Chief,  
Division of Rail  
California Department of Transportation | Martin Tuttle | Deputy Director,  
Planning and Modal Programs  
California Department of Transportation |
|---------|-------------|---------------------------------|---------------|---------------------------------|

### Ex-Officio Members:

#### Amtrak

| Stephen Gardner | Patrick Merrill, Assistant Vice President  
Policy & Development West  
Amtrak |
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<td>Vice President, Policy &amp; Development Amtrak</td>
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#### California High-Speed Rail Authority

| Roelof van Ark,  
Chief Executive Officer  
California High-Speed Rail Authority |       |
|-----------------------------------|---|

#### Southern California Association of Governments

<table>
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<th>Paul Glaab</th>
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| Mayor Pro Tem,  
City of Laguna Niguel  
Member,  
Southern California Association of Governments |       |
The LOSSAN Rail Corridor Agency Joint Powers Board met on October 26, 2011, in Los Angeles, CA. In attendance were:

- Joe Kellejian, SANDAG, Chair
- Jerry Amante, OCTA
- Art Brown, OCTA
- Salud Carbajal, SBCAG
- Diane DuBois, Metro
- Paul Glaab, SCAG
- Karen Heit, Metro
- Jerry Rindone, MTS
- Fred Strong, SLOCOG
- Bill Bronte, Caltrans
- Stephen Gardner, Amtrak
- Joe McHugh, Amtrak
- Bill Duggan, Amtrak
- Patt Merrill, Amtrak
- Will Kempton, OCTA
- Hasan Ikhrata, SCAG
- John Fenton, SCRRA
- Richard Katz, SCRRRA
- Linda Culp, LOSSAN Staff
- Gene Skoropowski, HNTB

PUBLIC COMMENTS AND COMMUNICATIONS

None.

SEPTEMBER 28, 2011, MEETING MINUTES

Linda Culp (SANDAG) pointed out the attachment to the minutes that discusses the planned Caltrans/Amtrak schedule change in detail. Ms. Culp also clarified that Amtrak’s eTicketing program is scheduled for nationwide deployment in 2012. The meeting minutes were approved.

CONSENT ITEMS

The corridor trends, Pacific Surfliner Express service progress report, and the Status of Federal Funding items were approved. Ms. Culp noted that Amtrak had provided additional feedback for the Pacific Surfliner Express staff report regarding the TAC comment that the first Surfliner northbound trip leaves late from San Diego and is a factor in on-time performance. Amtrak clarified the reason to be schedule conflict.
**LOSSAN CORRIDORWIDE STRATEGIC IMPLEMENTATION PLAN**

Gene Skoropowski (HNTB) noted that the strategic implementation plan is moving forward and a final report is scheduled to be completed in early 2012.

**LOSSAN CORRIDORWIDE BUSINESS CASE**

Michael Litschi (OCTA) provided the status of the Business Case and reported the recent actions of the project technical working group. James Campbell (PB) discussed the operations modeling effort in more detail. The 2030 long-term Business Case is made up of three service scenarios to address the growth of passenger rail in the region. Version 1 focuses on commuter and intercity rail service expansion without high-speed rail (HSR). Version 2 focuses on HSR service to the San Fernando Valley using conventional rail as a feeder service. Version 3 includes the full build-out of HSR.

The long-term scenario assumes that 30 new capacity improvements are operational by 2030. These projects were identified by regional agencies at a total cost of about $2 billion. The projects are distributed as follows: San Diego County (14 projects), Orange County (3 projects), Los Angeles (4 projects), Ventura County (5 projects), and Santa Barbara and San Luis Obispo Counties (4 projects).

Board Member Strong noted that SLOCOG is on track to find rail funding solutions. Board Member Rindone commented that we are in difficult times but a good marketing plan can make all the difference. We need to come up with numerous options for commuters.

Mr. Campbell noted that even with these additional capacity improvements a significant amount of single track remains, including key bottlenecks in Orange and San Diego counties, and 18-20 miles of additional double track north of Chatsworth. Additional capital projects necessary to support the revised service plan are new double track in south Orange County and north San Diego County, new storage capacity in East Ventura for up to six train sets, and approximately five miles of new infrastructure in Santa Barbara and San Luis Obispo Counties including station improvements and Centralized Train Control installation.

The 2030 service volumes are feasible assuming the revised service plan and the additional infrastructure recommendations. Freight traffic will continue to create challenges for operators. Overall, the travel times have improved over 2011 conditions on all routes.

Chair Kellejian (SANDAG) requested that the ridership model be completed by the November board meeting. Board Member DuBois (Metro) asked for clarification on the elimination of the Metrolink Burbank turn trains and future train service at Los Angeles Union Station (LAUS). Mr. Campbell explained that the elimination of these trains was necessary given the available infrastructure, but between additional Ventura commuter service and Surfliner service the overall level of train service will increase three-fold. Don Sepulveda (Metro) noted that Metro recently initiated a LAUS Master Plan to address future increases in all rail services at the station.
LOSSAN CORRIDORWIDE GOVERNANCE INITIATIVE

Will Kempton (OCTA) reported to the LOSSAN Board on behalf of the CEO group. The CEOs have continued to discuss some of the details related to a local governance for the Pacific Surfliner intercity passenger rail service. Staff completed an initial comparison of the current LOSSAN joint exercise of powers agreement with the Capitol Corridor Joint Powers Authority (JPA) and has created a SB 457 comparative matrix. Mr. Kempton noted that the CEOs have discussed potential authors and coauthors, directed staff to start drafting language for legislation, and asked the LOSSAN project manager to accelerate the development of the management plan for governance. The plan will include provisions on current and future staffing, staffing costs, a revised organizational chart for the managing agency, and other financial analysis.

Ms. Culp read an e-mail letter from Board Member Stocks (NCTD), who was unable to attend the meeting due to commitments with the SANDAG Regional Transportation Plan. Board Member Stocks’ e-mail expressed concerns about the quick schedule of the governance efforts, citing the lack of a completed business plan and the fact that coordination improvements are already underway between COASTER and Metrolink, and ultimately urged the Board to delay the legislative actions.

Board Member Strong asked for clarification on the statement that JPA members will be based on the existing LOSSAN Board structure, with exceptions, and also noted that Amtrak should be a participant in CEO discussion. Mr. Kempton clarified that the exception could potentially be adding RCTC as a voting member but the details have not been determined.

Board Member Carbajal noted that when we consider a managing agency we really need to look at an independent agency since there is a potential for conflict when we have LOSSAN staff report to the managing agency board instead of reporting directly to the LOSSAN Board. Mr. Kempton responded by stating that the Capital Corridor functions successfully with BART as a managing agency. Mr. Skoropowski also mentioned that the Capital Corridor agency acts independently from BART and that it reports directly to the Capital Corridor Board.

Board Member Amante (OCTA) noted that in Washington the Senate and Congress are more interested in focusing on regionwide—not agencywide—issues. Board Member Brown (OCTA) noted that our goal is to provide the best service for our passengers and that we have tried to do this once before and failed. We should keep going, not slow down. Hasan Ikhrata (SCAG) mentioned that if we don’t move forward we will maintain the status quo, which is a LOSSAN Board with limited power. Board Member Rindone (SDMTS) clarified that Board Member Stocks’ e-mail was sent as an individual and not as an action by SANDAG or NCTD. Board Member DuBois stated that the questions that are being raised are good and should not be interpreted as non-supportive. Board Member Strong requested that Amtrak and Caltrans be involved with CEO discussions.

STATUS REPORT ON LOSSAN CORRIDORWIDE SHORT-TERM IMPROVEMENTS

Mr. Skoropowski highlighted the recent progress on the short-term improvements.

Board Member Strong mentioned that the Metrolink Rail2Rail program is ending on November 1, 2011, and asked if there was anything the LOSSAN Board could do to delay the shutdown.
Mr. Sepulveda stated that the Metrolink member agencies sent a response letter today hoping to extend the program. Mary Travis (VCTC) explained that Rail2Rail is critical to providing rail service to Ventura County. Bill Bronte (Caltrans) explained that the State will be hit with increased costs as a result of Section 209. John Fenton (SCRRA) announced that a counterproposal to shift schedules will allow Metrolink to serve the peak commute periods. Chair Kellejian requested that an item on Rail2Rail be brought back to the Board at the November meeting.

**FOCUS ON AMTRAK CUSTOMER SERVICE**

Joe McHugh (Amtrak Vice President for Government Relations) and Stephen Gardner (Amtrak Vice President for Policy and Development) provided an overview of Amtrak and the Pacific Surfliner FY 2011 performance, recent actions to improve Surfliner performance, new Surfliner pricing strategy, the LOSSAN JPA proposal, and the Metrolink Rail2Rail (Attachment 1).

Overall, Amtrak ridership for FY 2011 was a record 30.2 million passengers, with 26 of the 40 Amtrak routes setting ridership and revenue records. Mr. Gardner discussed the JPA proposal and noted that Amtrak has a strong partnership with Caltrans today and is ready to partner with the LOSSAN JPA. A stronger local focus and greater service integration can be accomplished under either model. Under any governance model Amtrak will continue to be an essential partner to operate the Surfliner by providing Amtrak rolling stock and maintenance facilities, slot ownership, and statutory access to any host railroads at incremental cost and liability protection.

**OTHER ITEMS**

Chair Kellejian postponed the Pacific Surfliner Onboard Survey Results, Orange County Grade Crossing Safety Program, Status of the LOSSAN North Programmatic Environmental Impact Report/Environmental Impact Statement and Service Development Plan, and LOSSAN Administrative Item to the next meeting due to time constraints.

**BOARD MEMBER UPDATES**

Chair Kellejian noted that he will be going to Sacramento along with the chairs of the Capitol and San Joaquin corridors and the Coast Rail Coordinating Council to lobby for equipment in November.

**NEXT MEETING**

The next Board of Directors meeting is scheduled for Wednesday, November 16, 2011, at L.A. Metro beginning at 11:30 a.m.

Attachment: 1. Amtrak and the Pacific Surfliner

Key Staff Contact: Danny Veeh, (619) 699-7317, dve@sandag.org
Amtrak and the Pacific Surfliner

Stephen Gardner
Vice President, Policy and Development

LOSSAN Board Meeting
October 26, 2011

Presentation Outline

• Summary of Amtrak’s and Surfliner FY11 Performance
• Recent Actions to Improve Surfliner Performance
• New Surfliner Pricing Strategy
• LOSSAN JPA Proposal
• Metrolink Rail2Rail
• Questions
30 million riders in FY11!!!

• Overall Amtrak ridership of 30.2 million is our first time exceeding 30 million.
  – State-supported and short-distance corridors had best year ever, with 20 of 27 routes setting records.
  – Long-distance routes had best performance in 16 years and 5 routes set records.
  – NEC Spine and NEC regional had best year ever.
• In total, 26 of 40 Amtrak routes set ridership and revenue records in FY11.
• Pacific Surfliner – Ridership +6.6%; revenue +11.7%

Amtrak’s Business Lines – Ridership and Revenue

• State corridors – nearly half of Amtrak’s ridership and fastest growing
• NEC – over half of Amtrak ticket revenue, majority of capital funding
• Long distance – fewer riders, longer trips, majority of Federal operating support
• All business lines rely on Shared Costs – stations, mechanical, systems
Amtrak Operating Costs

- In addition to growing revenues, Amtrak has controlled costs
  - NEC and State Corridor operating costs holding to prior year levels despite ridership and revenue growth
  - Long Distance trains had increased costs due to severe weather, incidents & OTP

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<th>FY11 YTD</th>
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<tr>
<td>NEC Spine</td>
<td>$537.8</td>
<td>$674.8</td>
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<tr>
<td>State Corridors</td>
<td>$515.5</td>
<td>$537.8</td>
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<tr>
<td>Long Distance</td>
<td>$517.3</td>
<td>$711.3</td>
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Pacific Surfliner Customer Satisfaction (CSI)

- Customer satisfaction on the Pacific Surfliner is high (overall CSI is 89%), which is higher than many other state supported services.
- Always opportunities for improvement (Commercial Partner Satisfaction Program)

Selected FY11 CSI Measures for State Corridor Trains vs. Pacific Surfliner

- Overall CSI: 88% vs. 89%
- Overall Cleanliness of Train: 84% vs. 86%
- Restroom Cleanliness: 73% vs. 78%
- Info Given on Services/Safety: 80% vs. 82%
Amtrak and Surfliner On-Time Performance (OTP)

- Gains in NEC, flat for other State Corridors, declines in Long Distance

Recent Surfliner Actions

- Protect locomotive in San Diego – reduced minutes of delay
- Assigned Road Foreman to monitor train #563 (express train) – identified daily causes of delay
- Participated in funding independent study of Pacific Surfliner usage – documented usage of R2R and intercity riders
- Funding Carlsbad Double Track project – increases capacity (Amtrak capital funding, not ARRA)
- Supported Caltrans’ PTC grant request – facilitated grant award
- Participated in LOSSAN schedule integration effort - Identified areas for improved train and schedule coordination
New Surfliner Pricing Strategy

- Enhanced Pricing:
  - Amtrak/Caltrans Summer 2011 review of Pacific Surfliner pricing revealed:
    - existing Peak/Off-Peak fare structure was overly broad and failed to take advantage of ridership trends.
    - While some seasonal trends existed, day of week trends were the primary determinant of peak travel and the current fare structure did not optimally capture this demand (Sunday, Friday and Saturday = peak).

- Pricing Strategy: 3-step process towards new fare structure:
  - **Step 1**: Discontinue return to off-peak fares following Labor Day
  - **Step 2**: Implement peak/off-peak “day-of-week” pricing
    - Focus on Sunday, Friday and possibly Saturday as peak travel days
    - Target Spring 2012 for implementation
  - **Step 3**: Migrate Pacific Surfliner service to fully reserved and revenue managed, allowing for an expanded fare structure aligned with the demand for each departure.

Step 1 Preliminary Results

- **Projected FY12 Results**:
  - ticket revenue +9.5%
    - +4.9% due to market growth
    - +4.6% due to pricing actions

- **Actual Results for September, 2011**
  - Ticket revenue +20.3%
  - Ridership +5.1%
  - Amtrak conservatively estimates that one half (10%) of the 20.3% year-over-year growth is attributed to Step 1 Pricing action (discontinuance of Off-Peak fare).

- **Looking forward**
  - Overall ticket revenue performance to remain favorable year-over-year, but for the trend to slow as riders adjust their travel behavior in light of new pricing.
Joint Powers Authority Proposal

- Amtrak has a strong partnership with Caltrans today and is ready to partner with a LOSSAN JPA if one is created.

- Stronger local focus and greater service integration can be accomplished under either model – improvements are now underway and we’re ready for more.

- CCJPA and NNEPRA (Downeaster service) demonstrates alternative governance models can work well but require:
  - Dedicated and knowledgeable staff focused on intercity service
  - Strong collaboration with Amtrak

- Under any governance model, Amtrak will continue to be an essential partner to operate the Surfliners:
  - Amtrak rolling stock & maintenance facilities
  - slot ownership and statutory access to any host railroads at incremental cost and with preference over freight, plus incentive payments
  - National system assets: reservation system, commissary
  - Liability protection

- These unique Amtrak assets are not transferable

Rail2Rail Update

- Amtrak/Caltrans study demonstrates that Metrolink Rail2Rail program must be restructured:
  - Lost revenue opportunity - $2 R2R rate vs. $17 PSL fare
  - Popular trains are overcrowded
  - Additional cost to add 6th car to reduce standees

- New Metrolink Rail2Rail program must:
  - Protect intercity passenger experience and safety
  - Not cross-subsidize commuter trips
  - Reduce Amtrak/Caltrans operating costs
  - Significantly strengthen revenue performance
  - Protect intercity amenities (WiFi)

- NCTD Rail2Rail agreement could be the model:
  -- Customer pays step-up fare
  -- Provides more travel options at no cost to NCTD
Thank you and Questions

Amtrak 2011: Record Year & Poised for Greater Success!
Introduction

This report includes statistics that measure ridership, revenue, on-time performance (OTP), and Customer Satisfaction Index (CSI) for the passenger rail services on the LOSSAN Corridor, including the Pacific Surfliner, Coast Starlight, Metrolink, and COASTER. The Capitol Corridor, San Joaquin, and Amtrak overall figures are included for comparison purposes.

Surfliner Express

Amtrak and Caltrans launched the Pacific Surfliner Express Service on February 15, 2011, converting Train 565 between San Diego and Los Angeles to Train 563 with intermediate stops at Solana Beach, Oceanside, Irvine, and Anaheim. LOSSAN will monitor the Pacific Surfliner Express throughout the one-year pilot project and determine if there are any impacts to adjacent Amtrak and Metrolink trains. Ridership on the Pacific Surfliner Express train has been trending down since its peak in June, including a daily average of 250 in October. OTP on Train 563 has been significantly lower than the Surfliner average each month since July with only 61.6 percent in October. The downturn in OTP appears to correlate with the downturn in ridership. The primary causes for delay in October were mechanical failures on October 7 and October 20, a trespasser incident on October 28, and commuter train interference. Train 563 is consistently delayed for scheduled meets prior to Oceanside. There have also been three speed restrictions between San Diego and San Clemente, which makes it challenging to maintain the operating slot once in Metrolink territory. The schedule change in January will help improve the situation.
Ridership

When compared to the previous year, the Pacific Surfliner broke a streak of 12 consecutive months of positive growth with a 7.3 percent decline in October. All of the other Amtrak California trains have had positive increases for over 12 months. The reversing trend in ridership on the Pacific Surfliner can be attributed to the recent weekend track work that affected all weekend service between San Diego and Los Angeles. Passengers were bussed between San Diego and Irvine. Attachment 1 contains more information on the service disruption. Despite the drop in ridership the Pacific Surfliner corridor is still the second-busiest in the nation.

The Coast Starlight ridership has been in decline in 9 of the last 12 months but maintained a slight increase of 1.3 percent. Part of the downturn in ridership this past summer on the Coast Starlight can be contributed to the Midwest flooding that disrupted service on the Empire Builder preventing many connecting passengers.

The Capital Corridor has now experienced 18 consecutive months of increased ridership with an 8.9 percent gain in October 2011. The San Joaquins have experienced positive ridership growth in 23 of the past 24 months, including a 12.6 percent increase in October. Systemwide, Amtrak ridership had an increase in ridership with a 1.3 percent increase in October 2011.

For the commuter rail services on the LOSSAN corridor, the COASTER has now experienced eight months with large increases in ridership including a 22.0 percent increase in October. NCTD recently conducted a passenger survey that revealed that 26 percent of monthly pass holders have started riding the COASTER since January 2011 when fares were reduced. The October Metrolink ridership was up 9.1 percent. Metrolink ridership has surged the past three months. This ridership growth can be attributed to the new services on the Orange County Line and the Inland Empire/Orange County Line as well as the initiation of special weekend fares.

<table>
<thead>
<tr>
<th>Change In Passenger Rail Ridership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Surfliner</td>
</tr>
<tr>
<td>Capitol Corridor</td>
</tr>
<tr>
<td>San Joaquins</td>
</tr>
<tr>
<td>Coast Starlight</td>
</tr>
<tr>
<td>Amtrak Nationwide</td>
</tr>
<tr>
<td>Metrolink</td>
</tr>
<tr>
<td>COASTER</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change From Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2011</td>
</tr>
<tr>
<td>Jun 2011</td>
</tr>
<tr>
<td>Jul 2011</td>
</tr>
<tr>
<td>Aug 2011</td>
</tr>
<tr>
<td>Sep 2011</td>
</tr>
<tr>
<td>Oct 2011</td>
</tr>
</tbody>
</table>
Monthly Ridership of Corridor Passenger Rail Service
Previous 12 Months

Monthly Statewide Intercity Passenger Ridership
Revenue

Revenue was up across all services shown in the chart below. The Pacific Surfliner continues to have positive increases in revenue each month since December 2009, including a 6.2 percent increase in October compared to the same month in 2010 despite the downturn in ridership. Revenue on the Capitol Corridor had a 14.3 percent increase in October. The San Joaquins continue growth in revenue with a 12.6 percent increase in October 2011. The Coast Starlight recorded an increase in revenue by 3.4 percent. System-wide, Amtrak continued to have growth in revenue with a 4.9 percent increase in October 2011. Amtrak has not had a monthly downturn in revenue since October 2009.

OTP

The Pacific Surfliner OTP took a downturn this summer with a 65.5 percent, 70.9 percent, and 72.8 percent in July, August, and September, respectively. The Surfliner improved to 77.5 percent in October but LOSSAN South only has a 69.7 percent OTP. LOSSAN North performed better with an OTP of 80.6 percent. As mentioned above in the Surfliner Express discussion, OTP was impacted by a number of mechanical failures, a trespasser incident, and train interference delays. The Coast Starlight OTP was better than the Surfliner with an 83.3 percent OTP. The COASTER achieved slightly lower OTP for two consecutive months with 92.8 percent in October. Metrolink OTP was 95.7 percent for the entire system. Metrolink OTP mirrors Surfliner OTP for LOSSAN North and LOSSAN South with the Ventura County Line performing better than the Orange County Line with a 98.1 percent compared to 95.4 percent.
On-Time Performance of Corridor Passenger Rail Services

On-Time Performance of LOSSAN North and LOSSAN South

Coast Starlight
Metrolink
COASTER
Pacific Surfliner
Surfliner North
Surfliner South
Ventura County Line
Orange County Line
The Pacific Surfliner dropped below the other Amtrak California routes in overall CSI with an average score of 87 for September 2011. The Coast Starlight average CSI dropped to 83. The Capitol Corridor received an average score of 91 and the San Joaquins received a 90 in September. All of the California routes have maintained a CSI higher than the Amtrak average of 85. The September CSI will not be available until the next meeting. Attachment 2 is the Pacific Surfliner CSI summary sheet for September 2011.

![Amtrak Overall Customer Satisfaction Index (CSI)](image)

**Attachments**
1. Weekend Track Work Affects Service between San Diego and Los Angeles
2. Pacific Surfliner CSI Summary Sheet – September 2011
Weekend Track Work Affects Service between San Diego and Los Angeles

On Fridays, Saturdays and Sundays Oct. 21 - 23, Oct. 28 - 30 and Nov. 4 - 6

Weekend track work being performed by San Diego Northern Railway, will affect Pacific Surfliner service between San Diego and Los Angeles, as described below:

Fridays – October 21, 28 and Nov. 4

- Southbound Trains 592 and 796 will terminate at Irvine. Passengers will be provided reserved motorcoach service to all remaining stations on the route.
- Northbound Trains 595 and 597 will originate at Irvine. Reserved motorcoach service will be provided between San Diego, Irvine and all intermediate stations. Additionally, passengers traveling on Train 597 may experience delays of approximately 30 minutes between Irvine and Los Angeles.

Saturdays - Oct. 22, 29 and Nov. 5

Trains 564, 565, 571, 572, 578, 582, 583, 587 and 590 will be cancelled on Saturdays, Oct. 22, 29 and Nov. 5, and motorcoach service will not be provided. Passengers planning travel on these trains may make reservations aboard following Amtrak trains/motorcoaches.

- Southbound Trains 566, 768, 774, 580 and 784 will terminate at San Juan Capistrano.
- Southbound Train 592 will terminate at Irvine.
- Southbound Train 796 will terminate at Los Angeles.
- Northbound Trains 769, 775, 577, 785 and 591 will originate at San Juan Capistrano.
- Northbound Trains 763 and 595 will originate at Irvine.

Motorcoach Service Irvine-San Diego: Special, limited motorcoach schedules will operate between Irvine, San Juan Capistrano, Oceanside, Solana Beach and San Diego. A special motorcoach will operate San Diego-Los Angeles on train 597’s schedule. Motorcoaches representing Trains 592 and 796 will serve San Diego-Old Town. Service will not be provided at San Clemente Pier.

Sundays – October 23, 30 and Nov. 6

Trains 564, 565, 571, 572, 578, 582, 583, 587 and 590 will be cancelled on Sundays, October 23, 30 and Nov. 6, and motorcoach service will not be provided. Passengers planning travel on these trains may make reservations for travel on the following Amtrak trains/motorcoaches, or contact Metrolink for other travel options.

- Southbound Trains 592 and 796 will terminate at Irvine.
- Southbound Trains 566, 768, 774, 580 and 784 will terminate at San Juan Capistrano.
- Northbound Trains 763, 595 and 597 will originate at Irvine.
- Northbound Trains 769, 775, 577, 785 and 591 will originate at San Juan Capistrano.

Motorcoach Service Irvine-San Diego: Special, limited motorcoach schedules will operate between Irvine, San Juan Capistrano, Oceanside, Solana Beach and San Diego. Motorcoaches representing Trains 592 and 796 will serve San Diego-Old Town. Service will not be provided at San Clemente Pier.

Thank you for traveling with Amtrak. We appreciate your patronage and apologize for any inconvenience you may experience.
Pacific Surfliner

FY11 Customer Satisfaction Scores (with change vs year ago)

<table>
<thead>
<tr>
<th>September 2011</th>
<th>3 Month Average</th>
<th>Fiscal Year End</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Very Satisfied (80, 90, 100)</td>
<td>% Very Satisfied (80, 90, 100)</td>
</tr>
<tr>
<td></td>
<td>% Very Dissatisfied** (0, 10, 20)</td>
<td>% Very Dissatisfied** (0, 10, 20)</td>
</tr>
<tr>
<td></td>
<td>Average Score</td>
<td>Average Score</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Overall CSI</td>
<td>87% 2% -1 89 0</td>
<td>87% 2% 0 89 -1</td>
</tr>
<tr>
<td>Value of Amtrak Service for Price Paid</td>
<td>82% -2 4% +1 87 +1</td>
<td>83% 1% 0 87 +1</td>
</tr>
<tr>
<td>Trip Info Prior to Boarding Train</td>
<td>87% -5 4% -1 90 -1</td>
<td>88% 0 2% 91 0</td>
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<tr>
<td>Comfort of Seat</td>
<td>85% -4 3% 3 88 0</td>
<td>84% 1% 0 88 +1</td>
</tr>
<tr>
<td>Smooth/Comfortable Ride</td>
<td>84% -6 2% 2 89 -2</td>
<td>88% 1% +1 90 0</td>
</tr>
<tr>
<td>Air Temperature</td>
<td>83% -6 3% 0 88 -1</td>
<td>86% 1% +1 89 0</td>
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<tr>
<td>Overall Cleanliness of Train</td>
<td>79% -4 1% 1 87 0</td>
<td>83% 1% 1% 87 0</td>
</tr>
<tr>
<td>Cleanliness of Train Windows</td>
<td>69% +7 3% 2 79 +3</td>
<td>69% 0 2% 79 0</td>
</tr>
<tr>
<td>Restroom Cleanliness</td>
<td>64% -8 5% 4 76 1</td>
<td>63% -5 3% 77 -1</td>
</tr>
<tr>
<td>Restroom Odor</td>
<td>63% -6 7% 5 74 5</td>
<td>61% -2 7% 74 1</td>
</tr>
<tr>
<td>Info Given on Services/Safety</td>
<td>75% +10 3% 2 83 +5</td>
<td>75% +5 3% 83 +2</td>
</tr>
<tr>
<td>Info Given on Problems/Delays</td>
<td>85% +7 2% 1 88 +4</td>
<td>80% 3% 86 0</td>
</tr>
<tr>
<td>Clarity of Announcements</td>
<td>73% 0 6% 1 80 1</td>
<td>71% 0 5% 80 -2</td>
</tr>
<tr>
<td>On-Time Performance</td>
<td>80% -3 7% 3 85 -1</td>
<td>81% -4 6% 84 -3</td>
</tr>
<tr>
<td>Personal Security on the Train</td>
<td>89% 1% 0 90 0</td>
<td>87% 1% 90</td>
</tr>
<tr>
<td>Friendliness/Helpfulness of Train Conductors</td>
<td>88% +6 2% 2 90 +4</td>
<td>88% 3% 90 0</td>
</tr>
<tr>
<td>Availability of Food in Café Car</td>
<td>60% +7 7% 2 74 -1</td>
<td>60% 5% 76 -1</td>
</tr>
<tr>
<td>Friendliness/Helpfulness of Café Car Personnel</td>
<td>87% +9 0% 2 91 +8</td>
<td>82% 0% 2 87 +2</td>
</tr>
<tr>
<td>Quality/Freshness of Food in Café Car</td>
<td>75% +14 0% -5 82 +6</td>
<td>70% 3% -3 80 +1</td>
</tr>
<tr>
<td>Variety of Food Items in Café Car</td>
<td>52% +6 5% 0 72 +6</td>
<td>56% 7% 72 +2</td>
</tr>
<tr>
<td>Overall Experience in Café Car</td>
<td>73% +2 2% -8 82 +8</td>
<td>71% 3% -1 81 +2</td>
</tr>
</tbody>
</table>

| Number of Responses in Current Period | 108 | 312 | 1,332 |
| Number of Responses Year Ago | 115 | 329 | 1,436 |

* Overall CSI score, % very satisfied
** For % Very Dissatisfied, a negative change in the year-over-year score shows an improvement; a positive change shows the score has worsened.
Los Angeles - San Diego - San Luis Obispo (LOSSAN) Rail Corridor Agency

JOINT POWERS BOARD

November 16, 2011

AGENDA ITEM NO.: 5

Action Requested: INFORMATION

CORRIDOR MARKETING UPDATE

File Number 3400600

Introduction

Joint meetings of the LOSSAN member agency marketing and communications staff was identified as one of the quick improvements in the LOSSAN Corridor Quick Improvements Study. The fifth bimonthly marketing/communications/planning staff meeting was held on November 3, 2011, with staff from Caltrans, Amtrak, SLOCOG, SBCAG, VCTC, LA Metro, OCTA, NCTD, MTS, Metrolink, and SANDAG to discuss current marketing efforts and future joint marketing opportunities. The following is the meeting summary.

Joint Corridor Timetable

Staff continued discussing the production of a printed joint passenger rail timetable. NCTD is taking the lead on developing a couple of designs for the marketing group to review in early December. Linda Culp (SANDAG) and Emily Kuhnel (NCTD) will develop a timeline for developing the timetable for the March 2012 schedule change.

Agency Initiatives

Pacific Surfliner - Amtrak staff provided additional details on the upcoming activities in California related to Amtrak’s 40th Anniversary (Attachment 1). Marilee Bankert (Amtrak) noted that Amtrak is a sponsor of the San Diego Bay Food and Wine Festival, and patrons will get a discount on train fares. WiFi is expected to be operational on Surfliner trains by the end of November.

Metrolink - Mark Waier (Metrolink) provided an update on Metrolink activities including the introduction of “quiet cars” on each train, which have been well received by passengers. He noted an upcoming event at Laguna Niguel to promote bikes onboard trains, a new Web site launch the end of November, and the annual Holiday Toy Express trains in November and December. Metrolink also participated recently in the CycLAvia event in Los Angeles, which drew over 500 cyclists.

COASTER - Ms. Kuhnel provided an update on NCTD marketing activities including a busy first weekend with Sunday train service to the Carlsbad Village Street Fair and the Chargers/Green Bay NFL game. The Santa COASTER train is scheduled for December 4. NCTD is also stepping up its employer outreach, based in part on findings from a recent COASTER onboard survey.
Orange County - Meghan Taylor (OCTA) noted a special promotional Metrolink fare to upcoming Anaheim Ducks hockey games and that special trains will serve this year’s games between the LA Kings and Anaheim.

**Corridor Communications Coordination**

There will be major track closures for construction work during the weekends of November 5 and 6 and December 10 and 11 due to construction in San Diego County. Judy Leitner (MTS) noted station reconstruction activities in downtown San Diego will affect trolley service through the first weekend of November. Leslie Wade (SANDAG) noted that upcoming projects are scheduled for completion in 2012 and noted that staff will continue to coordinate on public communications efforts.

Attachment: 1. 40 Years as America’s Railroad

Key Staff Contact: Linda Culp, (619) 699-6957, lcu@sandag.org
40 Years as America’s Railroad

Amtrak has carried passengers on journeys across the length and breadth of the United States. People take our trains to visit family and friends, see America, experience the journey and come home again.

In celebration of the 40th Anniversary of Amtrak, a special exhibit train will be touring the country. The free exhibit showcases rail travel over the decades, displaying memorabilia including vintage advertising, past menus and dinnerware, period uniforms and photographs.

Whether you’ve been riding with us since the beginning, or just part of it, we will have something on our exhibit train that’s guaranteed to strike a chord.

**Special Exhibit Train Is on the Move**
The Amtrak Exhibit Train is touring the U.S. to celebrate Amtrak 40th Anniversary. We encourage you to visit the Exhibit Train to follow Amtrak through the decades — where we’ve been, where we’re going; celebrating the past, present and future of Amtrak.

**Collect 40 Years of Memories and Fun**
Learn more about Amtrak history, locomotives and train name origins or watch the trailer for our documentary, *Amtrak: The First 40 Years*. If you are looking to save a piece of Amtrak history as your own, the Amtrak store is your best source.

**Upcoming Corridor Events:**
San Diego, CA  
December 3 - 4, 2011  
1050 Kettner Boulevard  
San Diego, CA 92101  
10 a.m. - 4 p.m.  

Los Angeles, CA  
December 10 - 11, 2011  
800 North Alameda Street  
Los Angeles, CA 90012  
10 a.m. - 4 p.m.
RESOLUTION OF APPROVAL OF FINAL CHANGES TO
JOINT EXERCISE OF POWERS AGREEMENT File Number 3400600

Introduction

In April 2011, the Board of Directors approved the addition of the Riverside County Transportation Commission (RCTC) as an ex-officio member on the Board of Directors. This necessitated changes to the bylaws and joint exercise of powers agreement. Since that time, each voting and ex-officio member has approved this change to the joint exercise of powers agreement. The bylaws can be updated by a majority vote of the Board of Directors.

Recommendation

The Board of Directors is asked to approve a resolution in substantially the same form as Attachment 1 to approve the change to the bylaws and joint exercise of powers agreement with the addition of RCTC as an ex-officio member on the Board of Directors and direct staff to transmit these documents to the Secretary of State.

Attachment: 1. Resolution No. 2011-02

Key Staff Contact: Linda Culp, (619) 699-6957, lcu@sandag.org
Resolution No. 2011-02

A Resolution of the
Los Angeles-San Diego-San Luis Obispo Rail Corridor Agency

APPROVAL OF CHANGES TO THE
LOSSAN JOINT EXERCISE OF POWERS AGREEMENT
AND BYLAWS

WHEREAS, the Los Angeles County Metropolitan Transportation Agency, the Orange County Transportation Authority, the North San Diego County Transit Development Board, the San Diego Metropolitan Transit Development Board, the Southern California Association of Governments, the San Diego Association of Governments, and the California Department of Transportation signed a Joint Exercise of Powers Agreement (JPA) in January 1989 forming the Los Angeles-San Diego Rail Corridor Agency (hereinafter LOSSAN) for the purpose of enhancing intercity rail services; and

WHEREAS, LOSSAN approved adding the San Luis Obispo Council of Governments as a voting member, and transferring Ventura County Transportation Commission, Santa Barbara County Association of Governments, and San Diego Association of Governments from ex-officio members to voting member agencies in October 2001; and

WHEREAS, LOSSAN approved adding the National Railroad Passenger Corporation (Amtrak) and California High-Speed Rail Authority as ex-officio member and creation of an Executive Committee in January 2010; and

WHEREAS, LOSSAN approved adding the Riverside County Transportation Commission as an ex-officio member in April 2011, and individual LOSSAN member agencies have approved this change between April 2011 and November 2011;

NOW THEREFORE, BE IT RESOLVED that the modified JPA approved by member agencies in 2011 shall supersede the JPA signed in 1989 and amended in 2002 and 2010, and that these changes shall be effective November 16, 2011.

Passed and adopted the 16th day of November, 2011.

Chairperson, LOSSAN Board

LOSSAN Staff
November 16, 2011

AGENDA ITEM NO.: 7

Action Requested: DISCUSSION

LOSSAN CORRIDORWIDE STRATEGIC IMPLEMENTATION PLAN File Number 3400600

Work continues on the Corridorwide Strategic Implementation Plan, a plan to address better integration of the corridor’s passenger rail services. Attachment 1 details the progress made to date.

The focus of work since the Board’s October meeting continues to be on supporting the technical analysis underway on the business case, continued progress on the short-term/quick improvements, and participation with the corridor chief executive officers regarding governance initiatives. The LOSSAN program manager has developed a draft report outline (Attachment 2).

Attachments: 1. Progress Report  
2. Draft Report Outline

Key Staff Contact: Eugene K. Skoropowski, (407) 805-0355, eskoropowski@hntb.com
November 8, 2011

TO: LOSSAN Board of Directors

FROM: Gene Skoropowski, LOSSAN Project Manager

SUBJECT: Progress Report

Overall Study Progress

The project officially kicked off in August 2010 and is scheduled to be completed in 18 months. The schedule and status of specific tasks is summarized below:

<table>
<thead>
<tr>
<th>Task</th>
<th>Estimated Completion</th>
<th>%Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>Ongoing</td>
<td>85%</td>
</tr>
<tr>
<td>Stakeholder Outreach</td>
<td>Ongoing</td>
<td>85%</td>
</tr>
<tr>
<td>Data Gathering</td>
<td>February 2011</td>
<td>100%</td>
</tr>
<tr>
<td>Quick Improvements</td>
<td>December 2011</td>
<td>80%</td>
</tr>
<tr>
<td>Business Case</td>
<td>October 2011</td>
<td>90%</td>
</tr>
<tr>
<td>Preferred Service Plan</td>
<td>October 2011</td>
<td>75%</td>
</tr>
<tr>
<td>Implementation/Governance</td>
<td>December 2011</td>
<td>80%</td>
</tr>
<tr>
<td>Draft and Final Reports</td>
<td>January 2012</td>
<td>20%</td>
</tr>
<tr>
<td>Study Conclusion</td>
<td>January 2012</td>
<td>0%</td>
</tr>
</tbody>
</table>

Progress In October and November

- Participated in LOSSAN Business Case Operations Modeling Working Group meeting in early November.
- Participated in the LOSSAN Board meeting in Orange on October 26, 2011. Provided input for both the business case and governance items.
- Revised draft report outline with SANDAG staff.
Scheduled for Next Month

- Completion of the business case and specifically ridership forecasting of the long-term scenario.
- Continued progress on the short-term improvements.
- Continued discussions with SBCAG, Metrolink, and Union Pacific regarding Ventura to Santa Barbara commuter service. Initiation of preliminary engineering tasks.
- Participate in meetings with the CEOs on the institutional/governance options for the corridor.

Schedule Look Ahead Next 3 Months

- Completion of Short-Term/Quick Improvements
- Completion of the Business Case and Preferred Service Plan
- Completion of Governance Initiatives supporting information
- Continued stakeholder outreach and staff meetings
- Draft report

Outstanding Items:

There are no outstanding items at this time.

cc: Linda Culp, SANDAG Project Manager
LOSSAN Corridorwide Strategic Implementation Plan
Draft Report Outline

0. Executive Summary

1. Introduction
   Overview of Process
   Interagency MOU

2. Existing Conditions (Brief)

3. Stakeholder Outreach and Data Gathering, Public Information
   Key Objectives/Common Concerns

4. Quick Improvements

5. Business Case & Preferred Service Plan
   Short-Term (2014)
   Long-Term (2030)
   Capital investment needs and prioritized capital plan

6. Governance
   Existing administrative conditions
   Local Authority / Governance Structure
   Management Plan/Financial Case for Local Authority
   Legislative Needs
   Formal startup / agreements
   Managing Agency and Staffing

7. Summary

8. “Path Forward” Implementation Strategy

Appendices:
Detailed Business Case Analysis by PB and AECOM
Detailed Stakeholder Comments
Detailed Quick Improvements Listing
SWAT Team Assessment
STATUS REPORT ON LOSSAN CORRIDORWIDE SHORT-TERM IMPROVEMENTS

Introduction

Since the September 28, 2011, Board of Directors meeting, progress has been made on these short-term improvements:

- Ventura to Santa Barbara Service: SBCAG has authorized a contract for preliminary design and cost estimates for the work necessary to initiate service, and plans are progressing to forward a funding plan to Caltrans outlining the capital and operating program, the proposed sources of capital funds, and SBCAG’s ability to sustain operations.

- San Diego Station Signage: The first round of wayfinding signage updates is targeted at the Oceanside Transit Center (OTC). NCTD also plans updated COASTER-specific wayfinding signage at the Santa Fe Depot and Old Town Transit Center as well (following the updates at OTC). The OTC project remains on track for a December 2011/January 2012 completion.

- Freeway Changeable Message Signs: Caltrans is progressing with the use of electronic highway message signs to inform motorists stuck in traffic that they have another option, the train. Caltrans District 12 and Metrolink have agreed on the sign message and the pilot project in Orange County is progressing.

Discussion

The LOSSAN Corridor Quick Improvements Study final report was prepared by Wilbur Smith Associates on behalf of Orange County Transportation Authority (OCTA) in July 2008. This report lists 20 concepts for near-term improvements that could be implemented fairly quickly and at minimal cost. Four additional items were added by the LOSSAN Board through other actions since the publication of the final report. LOSSAN Technical Advisory Committee (TAC) members originally volunteered to implement various improvements but, due to other priorities competing for the same resources, their implementation suffered.

Since August 2010, the LOSSAN Project Manager has been charged to implement the remaining quick improvements by coordinating with member agencies and other stakeholders. Seven improvements have been fully completed. Several improvements have reached a level where implementation is fully dependent on an agency complimentary project that is currently underway or additional resources that have not currently been identified. Lastly, there are some improvements that have evolved over time or have been dropped due to various circumstances.
Table 1 shows the status of the short-term improvements as well as the agency responsible for implementation. The ‘gray’-colored rows indicate improvements that have been completed, ‘green’ indicates the improvements that are scheduled for implementation, ‘yellow’ indicates improvements that are moving forward but face some unresolved issues, and ‘red’ indicates improvements that will take longer to implement than first envisioned, and completion will likely extend beyond the end of February 2012 target completion date. The green and yellow items are expected to be completed or substantially completed by the end of February 2012.

The next section lists the original Wilbur Smith Associates recommended action for each improvement, the progress notes to date, and the required actions for implementation.
Table 1
STATUS OF SHORT-TERM IMPROVEMENTS

<table>
<thead>
<tr>
<th>Complete</th>
<th>Short-Term Improvement</th>
<th>% Complete</th>
<th>Implementing Agency</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>On-line Trip Planner</td>
<td>100%</td>
<td></td>
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<tr>
<td>✔️</td>
<td>Orange County Station Signage</td>
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<td>511 Information</td>
<td>100%</td>
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<td>Complete</td>
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<td>100%</td>
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<tr>
<td>✔️</td>
<td>L.A.–San Diego Limited Stop Express Service</td>
<td>100%</td>
<td></td>
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<tr>
<td></td>
<td>On-Train Information</td>
<td>90%</td>
<td>Caltrans, Amtrak</td>
<td>Surfliner WiFi will be activated soon</td>
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<tr>
<td></td>
<td>Amtrak Bus and Metrolink Connections</td>
<td>90%</td>
<td>Caltrans, Amtrak</td>
<td>Upcoming schedule changes will improve bus connections</td>
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<tr>
<td></td>
<td>Minimize Dwell Times</td>
<td>70%</td>
<td>Caltrans, Amtrak</td>
<td>Upcoming schedule changes will reduce selected dwell times. Amtrak and Caltrans are reluctant to reduce dwells significantly as this provides ‘recovery’ time for trains running late, and OTP is still below goal.</td>
</tr>
<tr>
<td></td>
<td>Consolidated LOSSAN Corridor Timetable</td>
<td>60%</td>
<td>Caltrans, Amtrak, Metrolink, NCTD</td>
<td>Operators will launch consolidated timetable targeted for in March 2012</td>
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<tr>
<td></td>
<td>San Diego Station Signage</td>
<td>70%</td>
<td>NCTD</td>
<td>New station signage will be installed by December</td>
</tr>
<tr>
<td></td>
<td>Freeway Changeable Message Signs</td>
<td>60%</td>
<td>Caltrans</td>
<td>Pilot project set to launch soon</td>
</tr>
<tr>
<td></td>
<td>Commuter Service to Underserved Markets</td>
<td>60%</td>
<td>Metrolink, NCTD</td>
<td>SD-OC through commuter service to launch in Spring 2012</td>
</tr>
<tr>
<td></td>
<td>Ventura to Santa Barbara Service</td>
<td>65%</td>
<td>SBCAG, VCTC, Metrolink, UP, Caltrans</td>
<td>A lot of momentum but trackage rights, capital improvements, and funding agreements must be formalized</td>
</tr>
<tr>
<td></td>
<td>Improved Distribution of passenger information at joint stations</td>
<td>60%</td>
<td>Caltrans, Amtrak, Metrolink, NCTD, local jurisdictions, station owners</td>
<td>Station surveys will be complete in December. Improvements will be dependent on each station operator.</td>
</tr>
<tr>
<td></td>
<td>Better Airport Connections</td>
<td>40%</td>
<td>Amtrak, Metrolink, LAWA</td>
<td>Operators need to develop agreements with LAX FlyAway.</td>
</tr>
<tr>
<td></td>
<td>Rail 2 Rail Program Corridorwide</td>
<td>40%</td>
<td>Metrolink, Caltrans</td>
<td>Negotiations continue between Caltrans/Amtrak and Metrolink.</td>
</tr>
<tr>
<td></td>
<td>Mutual Aid Agreements</td>
<td>50%</td>
<td>Caltrans, Amtrak, Metrolink, NCTD</td>
<td>Mutual Aid may be formalized as part of the new governance structure</td>
</tr>
<tr>
<td></td>
<td>Free Transfers – Transit Transfer expansion</td>
<td>40%</td>
<td>Caltrans, Local Transit Operators</td>
<td>Mechanisms in place but currently state lacks funding to expand program</td>
</tr>
<tr>
<td></td>
<td>Additional Midday Service</td>
<td>30%</td>
<td>Metrolink, OCTA</td>
<td>No timeframe set for Orange County service expansion program</td>
</tr>
<tr>
<td></td>
<td>Electronic Passenger Information System</td>
<td>20%</td>
<td>Metrolink, Amtrak</td>
<td>Dependent on PTC rollout</td>
</tr>
<tr>
<td></td>
<td>Joint Ticketing</td>
<td>20%</td>
<td>Amtrak, Metrolink, NCTD</td>
<td>E-ticketing on Surfliner Trains in 2012. No plans to integrate fares among services.</td>
</tr>
<tr>
<td></td>
<td>Schedule Changes on Local Transit</td>
<td>10%</td>
<td>Amtrak, Metrolink, NCTD, Local Transit Operators</td>
<td>No plans to base local transit schedule changes on train schedule changes.</td>
</tr>
<tr>
<td>✔️</td>
<td>Wi-Fi at Stations</td>
<td>N/A</td>
<td></td>
<td>Dropped</td>
</tr>
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</table>
Consolidated LOSSAN Corridor Trip Planner

Original Description: Develop a LOSSAN Corridor rail trip planner with illustrative mapping showing connections. Metrolink is currently working with Google Trip Planner to add schedules at no cost to SCRRA. NCTD and Amtrak should submit schedules to Google for on-line trip planning.

Progress Notes:
08/08: Assess Google Transit capabilities for corridor OCTA, bus services already available; Metrolink is investigating; SANDAG to check relative to Regional 511 System). Need to discuss maintenance issues/updates; need to develop budget.
10/08: OCTA provided status report at LOSSAN TAC meeting.
08/09: NCTD is in final testing with Google Transit.
10/09: NCTD schedules and routes are now available on Google Transit trip planning Web site. Currently Metropolitan Transit System (MTS), NCTD, OCTA, Metro, Metrolink, San Luis Obispo Transit, Santa Barbara Metropolitan Transit District, and Amtrak Pacific Surfliner (Santa Barbara to San Diego) are now available on Google Transit, allowing intercity and interagency trip planning.
04/10: All of the California Intercity Passenger Rail Corridors are now on Google Transit on-line trip planning service. Caltrans and Amtrak are working on adding the Amtrak Thruway Motorcoach Service to Google Transit.
01/11: The on-line trip planner is complete.

Actions Required for Implementation: COMPLETE

Orange County Station Signage

Original Description: With regard to directional signage, OCTA should work with local jurisdictions with stations to ensure adequate signage is in place. With regard to station signage, Amtrak and Metrolink should work together with LOSSAN Corridor public transportation agencies to ensure passenger information is located optimally per location for the benefit of all train riders. The potential for Metrolink personnel to provide Surfliner information via the Metrolink blue station phone should also be explored.

Progress Notes:
08/08: Additional signage has been installed showing which track to use, other information.
01/09: OCTA is proposing one integrated rail services sign for stations.
04/09: OCTA completed pilot program and is currently working with partner agencies to finalize.
08/09: OCTA continues to work with Orange County station cities to finalize and plans on moving forward with production (OCTA) and installation (City) in October/November.
11/09: OCTA has agreements with Orange County station cities and is now in the approval process with Caltrans Headquarters.
02/10: Designs have been approved and signs are being fabricated; Installation will be in 8 of 10 corridor cities.
03/10: The signs will be delivered on March 22. Cities will have 90 days to install.
04/10: Orange County station cities have started to install signs.
11/10: The Orange County Station Signage installation has been completed.

Actions Required for Implementation: COMPLETE
**Central Information Booth at Los Angeles Union Station**

Original Description: Metrolink, Metro, and Amtrak/Caltrans should jointly investigate the potential for locating and staffing a central information booth or booths at high foot-traffic points in Los Angeles Union Station (LAUS); e.g., at east and west portals of the under track pedestrian tunnel. The potential of selling both Metrolink and Amtrak tickets at the booth(s) could also be explored.

This improvement evolved into development of an informational brochure on the various services available at LAUS (also available at www.lossan.org).

**Progress Notes:**
- 08/08: Assess possibility of providing same information at each of the three locations, not just at a central booth.
  - Need formal information sharing agreement at each location.
- 12/08: Metro and Amtrak staff conducted walk thru at station.
- 04/09: Metro staff is heading up a group of LOSSAN TAC members and rail advocates to review this item.
  - One suggestion this group will discuss is the possibility of an informational brochure on all rail services at Union Station and where to find detailed information.
- 06/09: Metro marketing staff is currently developing a draft informational brochure, which should be available for LOSSAN review early this fall.
- 10/09: Metro marketing staff is anticipating the release of the information brochure in spring 2010.
- 02/10: Information brochure is delayed due to new vendors that are coming to Union Station in the summer. In addition to the brochure, enhanced station signage will also be installed.
- 07/10: Metro marketing staff has developed a Draft Union Station brochure and map and are seeking comments from the LOSSAN TAC and Board before they are made available to the public.
- 09/10: Metro marketing staff has finalized the Union Station brochure and map.
- 11/10: The station maps and brochures will be posted in the next few weeks after all of the new station vendors open.
- 01/11: Brochures have been distributed to Metro, Metrolink, and Amtrak representatives for distribution to answer questions regarding services at LAUS. Way finding maps have been printed. Metro has been working with Katellis on locations and placement.
  - This item is complete.

**Actions Required for Implementation:** COMPLETE

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**511 Information**

Original Description: Transit agencies in the LOSSAN Corridor desirous of having their transit information included in the Los Angeles area 511 deployment should contact Metro staff at (213) 922-2951. Also, Amtrak and Metrolink information should be made available via the 511sd phone system.

**Progress Notes:**
- 08/08: Investigate Google Trip Planner.
- 01/09: Metro staff to provide update at next LOSSAN TAC meeting.
- 04/09: Metro staff provided an overview of the 511 system for the Los Angeles area, to include rail information. The system is expected to launch in mid-2009.
04/09: LOSSAN Board of Directors requested a future presentation on 511 for other areas of the corridor.
03/10: Metro will launch the full scale 511 system in summer 2010.
05/10: OCTA and Caltrans District 12 are conducting an inventory of signage for 636-RIDE and 1-800-COMMUTE and will replace with 511 signs.
07/10: Metro’s 511 system went on-line in June. The Web site has information and links to all Los Angeles County transportation options including Metrolink and Amtrak. The Web site address is http://go511.com/default.aspx.
07/10: OCTA and Caltrans District 12 expect the inventory of signage will be complete by the end of July. All of the signs will be replaced with 511 signage.
11/10: San Diego, Orange, Los Angeles, Ventura, and San Luis Obispo Counties all have operational 511 systems with train information. Santa Barbara County is developing a traveler information Web site that will have train information.
01/11: Santa Barbara is receiving proposals for the development of the traveler information Web site. This system should be in place in the summer of 2011. GOAL: Short-term – Traveler information systems including rail options. Long-term – One source of traveler information.
04/11: This item is largely complete.

Actions Required for Implementation: COMPLETE

**Rail Connections**

**Los Angeles Connections Original Description**: Metrolink and Amtrak/Caltrans should continue to consider potential connections with each schedule adjustment made in future years in the context of other operating requirements; e.g., crew hours, fuel, train consists, mainline operating slots, etc. Key to this effort will be understanding the current connection policies of the operators and developing ones that reflect an effort to integrate different operators' services in the corridor. Further, the agencies should promote the existing connectivity of trains. One tool to promote connections would be the Consolidated Corridor Timetable discussed above.

**Oceanside Connections Original Description**: (A) Metrolink, NCTD/COASTER and Amtrak/Caltrans should continue to consider potential connections with each schedule adjustment made in future years in the context of other operating requirements, as noted above. Further, the agencies should promote the existing connectivity of trains. One tool to promote connections would be the Consolidated Corridor Timetable discussed above. (B) A study should be undertaken to analyze the market for rail travel through Oceanside.

**Progress Notes**:
08/08: Review in Strategic Assessment, including market research (current and future markets). Access relative to Rail 2 Rail program.
01/11: Metrolink is exploring the opportunity for increased connectivity with connections at LAUS. They are working on a revised schedule that may include additional connections. These changes will be shown in the new schedule in May 2011. Additional connectivity will be part of the strategic assessment business plan.
06/11: Initial work on the Business Case modeling identified a few ‘missed connections,’ most by only minutes. These have been provided to Metrolink and COASTER staff with the intent that small
adjustments in the train schedules can provide sufficient time for passengers to make connections. The Metrolink schedule change on July 5 will fix the missed connection between Metrolink train 656 and COASTER train 692.

07/11: Near-term easy fixes for missed connections were implemented as planned by Metrolink on July 5, 2011, Timetable. Metrolink announces transfer information upon arriving at LAUS.

07/11: This item is complete.

Actions Required for Implementation: COMPLETE

**Joint Marketing by LOSSAN Corridor Operators**

Original Description: Metrolink, NCTD/COASTER and Amtrak/Caltrans should discuss the opportunities for directed joint marketing for services to special events, as suggested above. Furthermore, Metrolink and Amtrak/Caltrans should explore creative ways to develop the potential of Rail 2 Rail® in the LOSSAN Corridor.

Progress Notes:

08/08: LOSSAN TAC recommends regular quarterly meetings between corridor agencies marketing staff.

10/08: Amtrak does not have staff support for additional quarterly meetings at this time.

04/09: LOSSAN staff will manage this project and contact Amtrak marketing staff and other regarding an initial conference call.

01/11: A conference call will be scheduled between SANDAG, NCTD, Amtrak, Caltrans and SCRRRA regarding this. This call will move this item forward.

02/11: LOSSAN staff will organize an initial joint marketing staff meeting to be held in conjunction with the LOSSAN TAC meeting on March 10, 2011, in Metro.

04/11: Marketing staff from each LOSSAN corridor agency met in March to coordinate corridorwide marketing efforts. Quarterly meetings have been scheduled and regular reports will be provided to the LOSSAN Board.

Actions Required for Implementation: COMPLETE

**Los Angeles-San Diego Limited Stop Express Service**

LOSSAN Board Recommendation: Implement limited stop Pacific Surfliner express service.

Progress Notes:

09/10: The results of the modeling were discussed at the LOSSAN TAC. Amtrak is moving forward with the concept.

11/10: Additional modeling was completed that showed favorable results.

01/11: This service is scheduled for February 2011.

GOAL: Implement limited stop express service.

02/11: Staffs from Caltrans, Amtrak, SANDAG, NCTD, MTS, Los Angeles Metro, and Metrolink are coordinating marketing and public outreach activities for the service launch on February 15, 2011.

04/11: Initial express service implemented 2/15/11. This task is complete.

06/11: Additional express trains are envisioned in the longer term and are being modeled as part of the Business Case.

10/11: Ridership continues to build on the express train, but usage by Rail 2 Rail riders is constraining commensurate revenue growth, along with less than reliable on-time performance.
11/11: Amtrak has completed a six-month progress report, primarily due to the recurring poor on-time performance of the route.

Actions Required for Implementation: COMPLETE

**On-Train Information**

Original Description: Continue to encourage on-board explanation of delays on Metrolink, COASTER, and Surfliner trains.

This improvement evolved to providing WiFi services onboard trains.

*Progress Notes:*

08/08: Need to define what level of information is needed and how frequent to provide.
12/08: SLOCOG has contacted Capitol Corridor Joint Powers Authority (CCJPA), whose research has raised questions regarding technical details and whether or not advertising as a revenue source is workable. CCJPA also investigating onboard Wi-Fi and we will follow that effort for the Surfliners.
12/09: Wi-Fi Internet access is being installed on all Surfliner trains in the business class cars. Installation is anticipated to be completed by February 2010.
01/10: By the end of February, flat panel displays will be installed on board that will show news feeds, movies, and possibly advertisements.
02/10: Most Surfliner trains installed with Wi-Fi in business class; monitor installation will be complete in late spring.
03/10: Amtrak is working out technical issues with the on-board Wi-Fi.
05/10: Amtrak is improving the on-board Wi-Fi by installing exterior antennas and reengineered the software to automatically reset if there is a problem.
06/10: Exterior antennas have been installed on the Surfliner business class cars that improve reliability of the on-board Wi-Fi.
06/10: Amtrak is installing new point-of-sale equipment on the Surfliner café cars that will improve the food and beverage concessions service.
01/11: This item is substantially completed. The reliability is being improved.
03/11: The current WiFi system on Surfliner trains has been discontinued. A national system is being implemented that is in use as a pilot program. This should be installed by the end of the year on Surfliner trains.
04/11: Initial West Coast tests are being conducted in Northern California
06/11: Implementation is ongoing in Northern California. LOSSAN should advocate that Pacific Surfliner should be the next application. A progress report to the LOSSAN TAC and Board on the Northern California experience would be in order by Amtrak/CCJPA after they have 3 or 4 months experience.
Next Steps: monitor progress in Northern California and press for installation in Southern California as soon as possible.
09/11: WiFi equipment is being installed on Surfliner cars.

Actions Required for Implementation: Amtrak and Caltrans must complete WiFi installation on the Pacific Surfliner fleet and officially launch the service.
Amtrak Bus and Metrolink Coordination

Original Description: Metrolink and Amtrak/Caltrans should discuss promotion of Metrolink/Thruway bus connections in their respective schedules. They should also discuss the potential for Thruway buses for making more stops so as to increase their utility for Metrolink riders.

Progress Notes:
08/08: Caltrans and Amtrak will discuss this further.
01/11: This will require meetings with operational and marketing folks to move forward. Strategic Assessment will establish a list of individuals to be involved to move this forward.
04/11: Amtrak Thru-way bus schedules have been integrated into the initial joint corridorwide Timetable.
06/11: The first course of action is to establish the high/low levels of ridership for connecting intercity passengers, especially to/from San Joaquin trains at Bakersfield, and to then plan the connections to be as time-friendly (convenient) as possible. The Business Case modeling effort is identifying Surfliner schedule changes that would improve the connecting times for bus passengers transferring from Bakersfield trains.
07/11: Business Case Train Schedule for 2014 is addressing improvement in these Bakersfield bus connections, resulting in significantly reduced ‘waiting times’ for most intercity bus riders making connections to trains at Los Angeles Union Passenger Terminal.
GOAL: Reduce connecting times for rail passengers transported by bus from Bakersfield.
07/11: This item can now be considered 100 percent complete, with implementation in the near-term service plan of 2014.

Actions Required for Implementation: Amtrak and Caltrans will improve Bakersfield Bus Connections to the Pacific Surfliner during the next schedule change in March.

Minimize Dwell Times

Original Description: All operators in the corridor should investigate the potential for any improvements in the safe and expeditious boarding and alighting of passengers which would help minimize dwell times consistently and allow scheduled run times to be reduced.

Progress Notes:
08/08: Amtrak currently is assessing recovering times.
Another solution might be to continue the station ambassador program to assist passengers and an informational campaign regarding how to handle baggage.
01/11: An assessment revealed that to have the resources for station ambassadors is cost prohibitive. The schedule has been developed to incorporate these dwell times to avoid delays. Looking for LOSSAN TAC and Board direction.
02/11: This was discussed with the Board at the 01/2011 meeting. It was referred back to the LOSSAN TAC for the 02/2011 meeting. A follow-up report will be given to the Board.
03/11: Amtrak does not see an advantage in cutting dwell times. This could negatively affect on-time performance. This will be addressed again once the modeling is completed and the business plan develops.
04/11: Amtrak is considering a survey of dwell times by station for weekdays and weekends.
06/11: Caltrans has expressed concern that a reduction in current ‘dwell times’ could worsen on-time performance. However, Amtrak and Union Pacific had a similar opinion when this was proposed on
the Capitol Corridor. After a field survey, unneeded dwell time at stations was eliminated. The Capitol Corridor has both shorter dwells and shorter scheduled travel time AND the best on-time performance of any Amtrak service in the nation. Staff is working with Amtrak to conduct a dwell time survey.

09/11: Amtrak conducted a dwell time survey and determined that dwell times are not excessive. However some dwell times will be reduced during the next schedule change.

Actions Required for Implementation: Amtrak and Caltrans will reduce dwell times during the next schedule change in March.

**Consolidated LOSSAN Corridor Timetable**

Original Description: Develop a LOSSAN Corridor Consolidated Timetable, showing all trains in the corridor from San Luis Obispo to San Diego. The timetable should highlight potential connections between services, as discussed in the preceding section. The timetable would be available on-line in an electronic format.

Progress Notes:
08/08: Need to discuss maintenance issues.
10/08: SANDAG did not receive funds for a grant application submitted to Caltrans or potential funds for the research tasks from the Federal Transit Administration’s Transit Cooperative Research Program.
12/08: A placeholder was included in the SANDAG Economic Stimulus list for implementation of this and other corridor quick improvements.
08/09: North County Transit District (NCTD), with assistance from SANDAG, is developing a work plan for this item, including a possible electronic version, by January 2010.
01/11: A meeting will be scheduled with Amtrak, Caltrans, Metrolink, and NCTD to discuss the implementation of this and the issues related to this. This meeting was to be scheduled for February 2011.
04/11: As of April 4, the meeting has not been held or scheduled between the designated agencies. However, a joint Timetable was developed as part of the LOSSAN Corridorwide Business Case. The LOSSAN Technical Advisory Committee (TAC) will continue to discuss this item in terms of a more customer-friendly version. A maintenance schedule also will be developed.
06/11: A consensus goal would be to have all rail schedule changes made on two dates per year, generally aligning with Amtrak’s spring and fall timetable changes. To overcome the challenge and cost of production of only ‘hard copy’ paper Timetables, technical staff will need to investigate the concept of using a common master format/program for all agencies to electronically input schedule changes that will update the joint Timetable automatically. The LOSSAN marketing group is also investigating the format and maintenance issues.
06/11: Scheduling staff at Metrolink, COASTER, and Amtrak will coordinate their fall service change in October. TAC is to plan for common electronic version, available for the fall 2011 schedule change.
07/11: Station site visits revealed that some stations had sequential consolidated Timetables on display, identifying the “Next Train” arrival/departure by direction, and whether the train was Amtrak or commuter. Expansion and standardization to all stations is the near-term goal.

Actions Required for Implementation: Amtrak, Caltrans, Metrolink, and NCTD marketing staff are developing concepts for a consolidated timetable. Additional funding will be required for the added printing costs from the LOSSAN member agencies. NCTD will be contributing creative services and production costs.
Actions Required for Implementation: The LOSSAN member agencies have completed 39 of the 46 station information surveys and develop recommendations for improvements. Caltrans, Amtrak, Metrolink, NCTD, local jurisdictions, and station owners will need to implement the recommendations.

San Diego County Station Signage

Original Description: NCTD/COASTER appears to have an active program to provide directional signs. NCTD should work with local communities with stations to ensure adequate signage is in place, particularly on major streets that don’t connect to/from Interstate 5 (I-5). With regard to Oceanside, Amtrak/Caltrans, Metrolink, and NCTD/COASTER should undertake a mutual conferencing or workshop process to identify both short term measures and longer term actions to coordinate information, signage, and public address announcements at that major facility.

This improvement evolved into an NCTD station wayfinding project which will be implemented as capital improvements are implemented at the Oceanside Transit Center.

Progress Notes:
08/08: Staff level can discuss merits of static versus real-time message sign (considered to be a short-term improvement before Electronic Passenger Information System (EPIS).
Discuss combining trailblazing program ("train" signs approaching station instead of individual Metrolink, Amtrak).
Oceanside Transit Center may warrant special task force.
01/09: OCTA recommendations on signs may be applicable. Staff will coordinate.
01/11: An example of a sign has been provided to SANDAG and NCTD for review.
The team will work with NCTD to develop and prioritize sign installation for the COASTER system.
GOAL: Improved San Diego station signage as warranted.
02/11: NCTD has developed concepts for improved station signage at COASTER stations based on community surveys conducted in fall 2010. Staff is reviewing concepts with the Board this month.
06/11: The NCTD Board approved a staff recommendation to proceed on implementing station signage improvements at COASTER stations. A consultant has been selected and is under contract.
11/11: NCTD reports that new COASTER signage is being delivered and on-target to have installation completed in December 2011/January 2012.

Actions Required for Implementation: NCTD will complete the station signage improvements at the Oceanside Transit Center. Planned track capacity expansion at Oceanside will also impact signage.

Freeway Changeable Message Signs (Congestion Management System) Used to Promote Train Travel

Original Description: Amtrak/Caltrans, NCTD/COASTER and Metrolink should discuss the potential for putting train information on freeway Congestion Management System (CMS) facilities with Caltrans Districts having CMSs in the LOSSAN Corridor.

Progress Notes:
08/08: Check how this is working in the Bay Area.
11/08: Rail staff inquired with Caltrans operations and needs some additional details from the LOSSAN TAC in terms of the type of messages, etc., before proceeding.
01/09: Division of Rail (DOR) staff will contact Caltrans District 4 to review the specific information that is posted and report back.

04/09: DOR staff has provided District 4 contact to LOSSAN staff for follow-up. Both SANDAG and OCTA staff will discuss as a pilot program with Districts 11 and 12.

06/10: SANDAG has identified freeway message signs on the I-5 corridor that provide opportunities for displaying train information. SANDAG is working with District 11 and OCTA is working with District 12 on proposals that will be submitted to Caltrans Headquarters for approval.

01/11: Determine the feasibility on the I-5 corridor in San Diego and Orange Counties and implement accordingly.

02/11: In San Diego, SANDAG and Caltrans District 11 staffs have discussed this. SANDAG is currently reviewing the map of current sign locations to determine which may be eligible and then will discuss with District 11.

03/11: OCTA met with Caltrans the week of February 21, 2011, to discuss utilizing the CMS to direct freeway drivers to train stations. A proposal is being developed and a meeting is scheduled in the near future. LOSSAN staff is collecting an inventory of sign locations throughout the corridor. Including Caltrans headquarters on the discussion will be a benefit in implementing a statewide system.

04/11: The rail operators need to craft succinct messages for a variety of circumstances covering roadway and rail operations in the event of the need for Caltrans to communicate with highway travelers who may need rail information as a travel option.

06/11: Caltrans is receptive and has asked for suggested language to use these electronic signs to assist drivers in identifying rail travel options, especially in the event of an accident or other highway blockage. Marty Tuttle of Caltrans reports that they are working with their District Office Traffic Operations. Use of the electronic signage to advise driver of the rail service option is ‘doable’ as long as there is no ‘pure marketing’ text.

07/11: Caltrans and Metrolink are working to implement a pilot program at Anaheim and Fullerton. Caltrans also made efforts to promote train travel on freeway message signs during the July 16-17 closure of the 405 freeway.

08/11: Caltrans is close to implementing a pilot program along I-5 between Orange and Los Angeles Counties. Signs would display train information when the freeway travel time is greater than train travel time.

**11/11: Caltrans is progressing with the use of electronic highway message signs to assist motorists stuck in traffic that they have another option, the train. Orange County is likely to be the first candidate installation. Caltrans District 12 and Metrolink have agreed on the sign message and the pilot project in Orange County is progressing.**

Actions Required for Implementation: Caltrans to implement pilot project on I-5 between Orange and Los Angeles County then expand the project to the entire LOSSAN Corridor along I-5 and Highway 101 where appropriate.
**Commuter Service to Underserved Markets**

**LOSSAN Board Recommendation:** Enhance services to attract new passengers in underserved commuter markets between San Diego County and Orange County.

**Progress Notes:**
11/10: Alternatives for additional commuter rail service will be developed in December and first quarter 2011.

01/11: Part of the business case.

06/11: The business case will be identifying and evaluating commuter service to underserved markets.

07/11: The Business case service schedule (Timetable) for 2014 has included these service improvements.

09/11: NCTD and Metrolink are developing plans to launch through commuter service north and south of Oceanside beginning as soon as spring 2012. The through special weekend Metrolink trains from Los Angeles to Solana Beach provided an opportunity to test operational coordination, and from all reports, the Southern California Regional Rail Authority and NCTD performed exceptionally well.

10/11: Operations modeling and ridership forecasting was completed on the short-term business case, including additional commuter trips to new markets.

**11/11:** Operations modeling for the long-term service plan was completed and presented to the LOSSAN Board of Directors in October. A ridership and revenue forecast is currently underway.

**Actions Required for Implementation:** Metrolink and NCTD to develop an operating plan and revenue sharing agreement to operate trains through Oceanside.

**Ventura to Santa Barbara Service**

**LOSSAN Board Recommendation:** Develop new rail service between Ventura and Santa Barbara to relieve peak period congestion on Highway 101.

**Progress Notes:**
09/10: Discussions are underway to have the 798/799 trains leave an hour earlier from San Diego. This would allow the intercity train to better serve commuter-friendly trips between Ventura and Santa Barbara. Modeling has been completed regarding this service.

11/10: Modeling is continuing. Caltrans Division of Rail (DOR) has indicated support of this service concept provided it makes sound business sense.

01/11: Modeling results pending LOSSAN TAC review. Included in near-term scenario of business case analysis.

03/11: There have been discussions between SBCAG, Metrolink, and Caltrans DOR regarding alternative methods to address this service. This is being looked at with the retiming.
04/11: Initial operating service pattern identified; layover site at East Ventura identified as preferable; initial contacts made with Metrolink regarding provision of equipment and operation of the service; contact made with Union Pacific regarding access and capital improvements required; North Goleta platform and possible stub track identified; Santa Barbara County initiated regional meeting; Caltrans is supportive of this effort and plans to funds Union Pacific Railroad requested improvements in conjunction with efforts to implement the ‘Coast Daylight’ between San Francisco and Los Angeles via San Luis Obispo.

06/11: Progress continues to be made. A determination is required to see whether or not an increase in current track capacity and/or other improvements are needed for a single weekday turn, and then modeling will test/confirm the performance.

Goal: Implementation by end of 2011/early 2012, in conjunction with the start of the Highway 101 reconstruction/widening.

07/11: Detailed site review was done, and no insurmountable issues revealed. Metrolink is preparing an updated operating proposal. Addressing liability insurance will be an issue, and there are options to satisfy this concern. Some tie/surfacing work will be needed on the north leg of East Ventura Yard wye track, and Metrolink is reviewing the added layover needs. An acceptable site for the provision of a new passenger platform on a new stub-ended storage/layover track at North Goleta has been identified, and will be costed out. Coordination with Union Pacific, Metrolink, Caltrans and the Counties of Santa Barbara and Ventura continues.

09/11: Metrolink has developed cost proposals for 1 train or 2 train operations between East Ventura and Goleta.

10/11: Union Pacific completed its internal capacity modeling and a report was submitted to SBCAG in late September, and is under review for next steps with Union Pacific. There are no ‘deal killers’ identified, but availability of capital funding for track capacity improvements are the key to implementation of both the Coast Daylight service and the Santa Barbara-East Ventura commuter service. Follow-up meetings with Union Pacific and SCRRA are planned.

Actions Required for Implementation: SBCAG and Ventura County Transit Center must coordinate on minor capital improvements at East Ventura, secure track rights with Union Pacific, develop operating plan with Metrolink, and provide operating subsidy possibly from highway mitigation funding.

**Improved Distribution of Passenger Information at Joint Stations**

Original Description: Metrolink, NCTD/COASTER and Amtrak/Caltrans should consider working together to determine the best practices for providing customer information at stations.

**Progress Notes:**

08/08: Formal arrangement between operators/agencies needed in order to provide integrated information. Further discussion needed in terms of level of info and maintenance.

01/11: The goal is to provide more opportunities for the dissemination of information at applicable stations.

04/11: While Amtrak staff routinely answers basic service and operational questions from commuter customers as their time allows, more detailed information can only be provided by Amtrak staff when the intercity customer demands are minimal. All Amtrak stations provide a measure of connecting commuter rail and transit information, however, resources (paid or volunteer) are required in order to constantly monitor availability of all commuter rail and transit information at stations.
06/11: Volunteers provide extensive transit and Metrolink information at Santa Barbara and Van Nuys Stations already. In addition, about half the 27 Pacific Surfliner stations have staffed stations with both local transit and Metrolink information available. The challenge is to keep that information current. LOSSAN TAC must be involved with Amtrak, Metrolink, COASTER, and rail advocacy organizations to start a ‘test territory.’

07/11: During the week of June 20-24, staffed stations were visited to document the current availability of Metrolink and local transit information. Separate ‘Report’ has been distributed, with suggested checklist form and items to be observed. While provision of electronic Timetable/schedule information may reduce the need for ‘hard copy’ public Timetables at Stations, printing of a consolidated, sequential Timetable for public posting at several locations at stations/platforms is essential. Examples already exist, and should be provided in a standardized, easily recognizable format at all stations. As was noted previously, the potential also exists for electronic ‘kiosks’ at all stations, where a customer could get comprehensive information on travel, as well as area maps, attractions, hotels, restaurants, special events, etc., in addition to train and transit information. Private ‘marketing companies’ may be interested in providing these kiosks at stations, as they do at hotels and airports. Again, the appearance, color and graphics should be ‘standardized’ for easy recognition by customers.

09/11: LOSSAN Station Information SWAT Team Checklist surveys are being conducting in September. A final report will be completed in December.

10/11: Field surveys continue with information for 39 or 46 stations collected to date.

**Airport Connections**

Original Description: At a minimum, new airport connection services should be explored from the Anaheim to LAX and from the Santa Ana Station to John Wayne. Amtrak and MTS should discuss the potential for Amtrak riders getting a free transfer to the Airport Flyer for a ride to the airport, as COASTER riders can today. Also, operators should encourage the corridor airports near them to provide user-friendly links to their Web sites. A quick review of major airports’ Web sites showed that San Diego, Burbank, and Orange County airports did have such links, LAX, Santa Barbara, and San Luis Obispo did not.

This improvement evolved to also include allowing Amtrak passengers to purchase Flyaway bus tickets from Union Station to LAX the same way they purchase any Amtrak California Thruway bus ticket (one transaction, but two coupons). Requires agreements on ticketing and revenue payments.

**Progress Notes:**

07/08: The City of Irvine is working with Los Angeles World Airports (LAWA) to implement a Los Angeles International Airport) LAX Flyaway service at the Irvine Transportation Center.

08/08: Use San Diego work as potential pilot for a larger application.

10/09: The City of Irvine and LAW A will begin LAX Flyaway service from Irvine Station on November 16, 2009. One-way fares will be $25 with six trips in each direction per day.

12/09: SANDAG is working on advanced planning for an intermodal transit center at San Diego International Airport.
05/10: SANDAG is planning an intermodal transit center at Lindbergh Field. Possible improvements include a pedestrian bridge connecting the rail lines to the airport facility, grade separations, parking, and a high-speed rail station. The plan is will be complete by November 2010.

10/10: The Burbank-Glendale-Pasadena Airport Authority has submitted applications for construction of a $120 million Regional Intermodal Transportation Center (RITC) at Bob Hope Airport. The RITC will allow air, rail, bus, and rental car travelers to converge seamlessly at one central point.

10/10: SANDAG has completed initial planning on the Intermodal Transit Center at San Diego International Airport and will now prepare preliminary designs followed by formal environmental studies.

01/11: Irvine FlyAway is operational. The Intermodal Transportation Centers are progressing through advanced planning and scheduled for construction in 2013 (Burbank) and 2015 (San Diego). The LOSSAN TAC will check their progress periodically.

04/11: Amtrak requested to include Southern California “Flyaway” buses as part of their Amtrak ticket purchase.

06/11: Metrolink has agreed on a joint use ticket with the Flyaway bus to LAX. Amtrak has been requested to set up the LAX Flyaway service in its reservation system so that Amtrak passengers can purchase their Flyaway bus ticket as if the bus was an Amtrak California Thruway bus.

**Actions Required for Implementation:** Amtrak and Metrolink must coordinate with Los Angeles World Airports (LAWA) to add the Union Station LAX Flyaway bus connection as an additional destination for rail trips. Funding agreements must be formalized.

### Corridorwide Rail 2 Rail Program

**LOSSAN Board Recommendation:** Ensure that the Rail 2 Rail program continues allowing monthly commuter rail pass holders to ride on Amtrak trains.

**Progress Notes:**

10/10: Rail 2 Rail service at various locations is being discussed. Overall Corridor efforts are not underway.

01/11: Metrolink Rail 2 Rail program currently undergoing analysis; COASTER Rail 2 Rail currently under discussions.

02/11: The Team reported the status of Rail 2 Rail at the 1/11 Board meeting. The Board referred this back to the LOSSAN TAC for further discussion.

03/11: NCTD has reached an agreement with Amtrak on their Rail 2 Rail service. This will be a separate cost to be able to use this service. The COASTER customer buys the monthly pass then buys a “step up” pass from Amtrak to use Rail 2 Rail. This has not yet been signed

04/11: Awaiting results of Los Angeles County Metropolitan Transit Authority request to Amtrak to conduct surveys on the specific trains which are reported to consistently have standees, and for which segment of the run that Amtrak is experiencing standees. The COASTER/Amtrak agreement has been signed and the program is scheduled to begin in June 2011.

06/11: The parties are awaiting response on the survey of impacted trains; then, an agreement will still be needed between Amtrak, Caltrans, and Metrolink.

07/11: Program has been extended on an interim basis; NCTD has completed its agreement with Caltrans for Rail 2 Rail which will begin on August 1, 2011; Metrolink needs to conclude its agreement but is awaiting results of an Amtrak audit, requested earlier this year.

08/11: Rail 2 Rail program is now available for COASTER passengers between Oceanside and San Diego. This task is partially complete.

08/11: Caltrans is meeting with local agencies to discuss Rail 2 Rail for Metrolink.
09/11: Amtrak will be conducting a standee assessment in September to help answer questions for the Metrolink Rail 2 Rail program.

11/11: Amtrak completed the standee assessment and provided the results to Metrolink. Agency management is currently discussing options for moving forward with the program.

Actions Required for Implementation: Metrolink and Caltrans must come to an agreement on the terms of a new Rail 2 Rail contract. Safety, overcrowding trains, and funding formulas must be decided.

**Mutual Aid Agreement**

Original Description: Metrolink and NCTD/COASTER should each formalize a mutual aid agreement with Amtrak/Caltrans.

Progress Notes:
08/08: Need to identify components of a formal agreement (currently, the only formal agreement is between the NCTD and Southern California Regional Rail Authority [SCRRA]); consider including in Rail 2 Rail agreement.
01/11: NCTD working with Caltrans on the Rail 2 Rail agreement that includes this language.
06/11: While no formal agreements are currently ‘in place,’ Amtrak, Metrolink, and COASTER do cooperate on a ‘mutual aid’ basis when a train of any passenger operator is disabled. As train intensity/frequency increases along the LOSSAN Corridor, it will become increasingly important for personnel of each agency to be able to reference a formal Mutual Aid Agreement in these situations. Also, COASTER and Amtrak have agreed on a Rail 2 Rail Program for San Diego County, and establishing a formal Mutual Aid Agreement between Metrolink and Amtrak might be an opportunity to renegotiate the Rail 2 Rail program for the Metrolink services.
07/11: Metrolink, Amtrak and COASTER need to formalize the procedures, terms and conditions of their ‘mutual aid’ in the event of a service disruption or mechanical failure on a train. This near-term agreement can only be implemented between and among the operating entities. The action they must collectively take has been identified. Mutual Aid will be addressed with the governance structure.

Actions Required for Implementation: Caltrans, Amtrak, Metrolink, and NCTD must formalize mutual aid agreements between their agencies.

**Transfers**

Original Description: All transit services connecting to trains in the LOSSAN Corridor should be encouraged to offer free transfers to train riders. Cost sharing agreements, where necessary between agencies, should be developed to support maximum ease of transfers.

Progress Notes:
08/08: Need further analysis on budget impacts.
08/09: Amtrak has concluded it cannot accept the liability of honoring non-Amtrak tickets.
01/11: The question of revenue and how this will be handled logistically needs to be discussed. The goal is to integrate regional fare policy and develop common fare media that are based in part on early implementation lessons in the corridor as appropriate (electronic revenue collection).
04/11: Sample Capitol Corridor Transit Transfer agreement obtained and circulated to the LOSSAN TAC for comment and future LOSSAN Board action to implement this program as extensively as possible on the LOSSAN Corridor.

06/11: While Caltrans has established free transit transfers for LOSSAN trains in San Luis Obispo and Santa Barbara, and the mechanisms (standard contracts and procedures) exist to implement a corridor-wide transit transfer program, the major obstacle to implementing this is the lack of adequate state operating funds allocated to the LOSSAN Service.

07/11: The only remaining obstacle to expanding implementation of “Transit Transfers” from the intercity Pacific Surfliner customers for ‘free’ connections is provision of funding for this purpose in the state operating budget for the Surfliners.

**Actions Required for Implementation:** Caltrans must identify and propose an additional funding item in the intercity rail budget to expand the state’s transit transfer program, as the current budget amount for such transfers is already at capacity. If additional funding is identified and made available for this purpose, Caltrans can then execute agreements with the remainder of the local transit operators along the LOSSAN corridor.

### Mid-Day Service

**Original Description:** Negotiate with Amtrak and Caltrans to have one or two of the mid-day Surfliner trains make added stops in Orange County, and explore Ventura County Line service additions with Los Angeles and Ventura Counties as longer term options.

**Progress Notes:**

08/08: Consider an exercise with a "blank canvas" rail corridor - how would services be designed from scratch?

12/08: SA will develop a service vision for review by the LOSSAN TAC and Board of Directors.

01/11: OCTA is moving forward with their plans to implement enhanced midday service within the coming years.

The SA will be looking at additional service into other segments of the Corridor with the modeling of the coordinated Corridor.

**GOAL:** pending discussion.

04/11: Any additional intercity service will require the procurement of additional rolling stock by the State of California and/or Amtrak.

06/11: Existing Amtrak mid-day service stopping at additional ‘local commuter’ stations impacts the operating schedules and train cycling along the entire Corridor. The Business Case model can look at this possibility, but intercity travel time on the mid-day Amtrak trains making these local stops would become significantly longer. Provision of Orange County mid-day commuter service with additional commuter frequencies is likely to remain the best option for enhanced mid-day travel choices, thereby keeping the Amtrak trains as a faster, limited stop corridor service. While the Federal Railroad Administration recently announced that California would receive federal grant funds to acquire at least 15 additional California cars for the state’s three intercity rail routes, including cars for the LOSSAN Corridor, these additional cars will not arrive for 3-4 years, and will likely first be used to increase capacity of existing crowded trains.

07/11: Metrolink Service Expansion Program began on July 5, 2011, with the addition of six trips on the Orange County line. More midday service is planned in the future.
**Actions Required for Implementation:** Metrolink and OCTA have identified mid-day service enhancements but no implementation timeframe has been set due to limited demand and reduced operating funds.

**Passenger Information at Stations**

Original Description: Given that EPIS will respond to passengers’ need for train information both at stations and via the internet, no further immediate action appears necessary at this time. Once the system is in place and working, Metrolink and Caltrans should consider expanding it on an expedited basis to include Surfliner trains within Metrolink’s service area.

**Progress Notes:**

08/08: Since May, staff has conducted monthly conference calls (LOSSAN, Metrolink, Amtrak, Caltrans, and the San Luis Obispo Council of Governments [SLOCOG]) to discuss implementation and integration issues. Need to check implementation at COASTER stations.

01/09: Staff continues to coordinate, Amtrak currently investigating TWITTER text messaging for Amtrak train status; potential for state funds for integration work at joint stations to be on hold.

04/09: Staff will schedule a follow-up meeting for this group in May.

07/09: Amtrak announced that the next generation of Passenger Information Display System (PIDS) signs (4-line signs) will be delivered in October with installation at all stations by the end of the year.

10/09: Amtrak launched the Pacific Surfliner Twitter service, which provides train status updates via mobile phone text messages to people who sign up for the free service. Amtrak and Caltrans are looking into marketing the Twitter service.

03/10: Amtrak will be installing new 4-line PIDS signs at non-Metrolink stations in March and April.

04/10: Amtrak installed 4-line PIDS signs at all non-Metrolink Surfliner stations with the exception of Santa Barbara. Amtrak is working with the city of Santa Barbara to install the signs and the installation is expected in the next few weeks. All of the shared Metrolink/Surfliner Stations will be upgrading to the new Metrolink PIDS signs that are anticipated to be installed within 8-12 months.

06/10: All 4-line PIDS signs at all non-Metrolink Surfliner stations have been installed and are operational.

11/10: Metrolink will be installing message boards in 2011. COASTER implementation is to be determined.

01/11: Metrolink is working with a vendor to install EPIS on their trains. They are looking at testing the system in the next several months. Installation will take approximately one year.

02/11: It was reported at the February LOSSAN TAC meeting that the EPIS system is not moving forward. Metrolink is integrating the customer information system with their Positive Train Control (PTC) program.

04/11: Since PTC is an evolving project on the Los Angeles Basin rail lines, this program has been terminated as an independent stand-alone installation, and is being consolidated and integrated with the PTC system installation and procurement. Agencies involved in the PTC procurement will establish a delivery and installation schedule, with a new ‘turn on’ target date for PTC and E-passenger Info System.

**Actions Required for Implementation:** Digital message signs are installed at all stations, however there are separate systems and signs at shared stations. Metrolink will be launching a new passenger information system at some point in the future in conjunction with PTC. Amtrak train information would need to be incorporated into a single system.
**Ticketing**

Original Description: Metrolink, Amtrak/Caltrans and NCTD/COASTER should investigate the potential for selling COASTER tickets through the new ticket vending machines (TVMs).

This improvement evolved into implementation of Amtrak’s new E-ticketing program on the Surfliner corridor. Integration of the corridor systems is a longer term goal.

**Progress Notes:**
08/08: Additional technical details and costing should be analyzed.
11/09: Joint ticketing and electronic fare collection have been identified as an action item in the SA. SANDAG, Metro, and Ventura County Transportation Commission have committed to Cubic contactless smart card technology. Amtrak will be using a different system.
02/10: Amtrak will be implementing a new E-ticketing technology that will bring airline style ticketing to intercity rail travel. It has not been determined how Amtrak E-ticketing will address Rail 2 Rail passengers.
01/11: GOAL: Integrate regional fare policy and develop common fare media that are based in part on early implementation lessons in the corridor as appropriate (electronic revenue collection). Metrolink is developing an on-line ticketing service. This is getting integrated with the ticket vending machines.
04/11: Amtrak E-ticketing implementation to start on Capitol Corridor.
06/11: Progress is being made to look at opportunities for joint ticketing that benefit riders, as well as protect the revenues for the funding partners of the services. The advancement of the E-ticketing system in Northern California may provide joint ticketing opportunities that currently are difficult or impossible to implement and still satisfy the financial criteria of all participating parties.
09/11: Amtrak has launched E-ticketing on the Capitol Corridor which will be followed by a nationwide roll-out. Some ticket types like multi-ride tickets will not be available with E-ticketing due to the potential for fraud.
10/11: The LOSSAN TAC will hear an update from Amtrak at its November 3, 2011, meeting.

**Actions Required for Implementation:** There are two steps identified in this process. The short-term solution is successful implementation of Amtrak’s E-ticketing on Surfliner trains. The longer-term solution is to address an integrated regional fare policy and common fare media.

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**Impact of Schedule Changes on Local Transit**

Original Description: Given the anticipated changes to train schedules, particularly on Metrolink, local transit providers in the LOSSAN Corridor should be asked to regularly review their timetables to optimize the potential for good transit-rail connections wherever possible. In particular, OCTA where possible should time bus arrival at stations 15 minutes prior to scheduled train arrivals and bus departures 15 minutes after scheduled train arrivals as a means of facilitating bus-to-rail transfers.

**Progress Notes:**
08/08: Rail infrastructure drives headways; bus schedules are timed.
   Consider a further analysis of bus-rail connections in the corridor.
01/11: This item will be part of the overall business plan. A review of the bus schedules related to the train station stops will be done. The incorporation of train schedule changes with bus service will be examined.

06/11: Discussion has started, and the challenges are complex and many: the frequency of transit schedule changes (some mandated by labor agreements) and the necessity of keeping all data and information up-to-date. As a ‘first step’ it will be helpful to establish a ‘Base Case’ of existing transit services at each LOSSAN Corridor Station. Initially, identifying the operating agency, the route number/destination (or rail line and destination), the peak frequency in minutes, off-peak frequency should provide adequate information to assess viability as a dependable ‘connecting service.’ Then, when a train schedule change occurs, at least the magnitude of the impacts to connecting local transit (bus and rail) can be estimated.

07/11: One element that will facilitate ‘timely local transfers’ is as much advance notice of a train schedule change as possible to the local transit agency provider, and what those changes in train service will be. The local transit provider can then evaluate if changes are needed, and the feasibility/cost effectiveness of any changes needed to the local transit operation.

Actions Required for Implementation: Amtrak, Metrolink, NCTD and the local transit operators that serve LOSSAN train stations must coordinate schedule changes and improve timed transit connections.

**WiFi at Stations**

Original Description: Amtrak/Caltrans, Metrolink and NCTD/COASTER should jointly explore the cost-effectiveness of WiFi service options at station locations.

Progress Notes:
08/08: Assess one system between operators.
01/09: Review completed.
04/09: In March, the Santa Barbara County association of Governments (SBCAG) began providing free WiFi at regional transit centers including the Santa Barbara rail station.
01/11: Some stations do not have the infrastructure installed for this service. This will be discussed further in February to move this forward. A prioritization plan will be reviewed to establish the stations that this will be installed in.
04/11: Major stations currently have Wi-Fi centers, with limited application at other outlying locations.
06/11: Staff will be identifying which stations should have Wi-Fi based on characteristics of that station. More long-distance vs. commuters, long layovers/transfers, etc.
07/11: The existing Wi-Fi at stations is adequate. There is no need to pursue Wi-Fi at additional stations especially once on-board Wi-Fi is available. This Item has been dropped.

Actions Required for Implementation: Improvement no longer considered for implementation.

Key Staff Contact: Gene Skoropowski, (407) 805-0355, eskoropowski@hntb.com
UPDATE ON THE RAIL2RAIL PROGRAM

Introduction

The Metrolink/Amtrak/Caltrans Rail2Rail program allows Metrolink monthly pass holders and Amtrak passengers to ride both services within the limits of their tickets. Based on data provided by Amtrak, since 2003, there has been a 68 percent increase in Rail2Rail ridership in the corridor, currently representing about 20 percent of Pacific Surfliner ridership. Amtrak recently completed a standee survey to document overcrowding issues due to the success of the program. Metrolink, Amtrak, and Caltrans management have reviewed this document as well as discussed possible options for moving forward.

The TAC discussed this item at its November 3, 2011, meeting. Metrolink and Amtrak staffs provided an overview of recent meetings between senior management at Caltrans, Amtrak, and Metrolink, and specifically continued discussions on five potential options for the program:

1. Pass along the cost of the program to riders in the form of a Step-Up Program, possibly modeled after the program initiated in August between NCTD and Amtrak or in place on other rail corridors.
2. Offer riders a Metrolink premium pass at an increased cost over the current pass (e.g., 15 percent higher).
3. Institute an Amtrak reservation system for the Surfliners. Seats that are left will be available to Metrolink riders.
4. Adjust the schedules for Surfliner northbound train 763, departing San Diego at 6:01 a.m., and southbound trains 582 departing Los Angeles at 4:10 p.m. and 784 departing Los Angeles at 5:10 p.m. so they are no longer peak-period trains. These time slots would be used by Metrolink trains.
5. Eliminate the program.

TAC members discussed these corridorwide issues:

- Maintaining the level of convenience similar to current for riders over alternatives such as the Step-Up Program.
- Schedule implications for southbound Surfliner riders leaving Los Angeles.
• Schedule implications for the 700 series trains (763 and 784) being through trains to Santa Barbara and the need to potentially renegotiate these slots with host railroads.

Metrolink and Amtrak staffs noted that talks will continue and staff from both agencies will provide an update at the Board of Directors meeting. The current contract expired October 31, 2011, and all parties are committed to continuing to discuss these options and provide ample notice to customers of any changes.

Key Staff Contact: Linda Culp, (619) 699-6957, lcu@sandag.org
Amtrak and Caltrans launched the Pacific Surfliner Express Service on February 15, 2011, converting Train 565 between San Diego and Los Angeles to Train 563 with intermediate stops at Solana Beach, Oceanside, Irvine, and Anaheim. Amtrak has compiled an assessment of the service’s first six months of operation (Attachment 1).

The Technical Advisory Committee (TAC) discussed this report at its October 13, 2011, meeting and had the following comments:

- The Caltrans assumptions predicted this outcome. Perhaps it was a bit premature to launch express service. It’s better to add a new express train rather than convert an existing train.

- If this is a one-year pilot project, when is the determination going to be made to continue or discontinue this service?

- Fares were also increased, so it is not completely fair to look at 2011 vs. 2010 comparison. It was noted that fares were increased but there is no premium charge for the express service.

- There have been more track work and mechanical delays on the San Diego segment but the assumption that the COASTER is at fault for Amtrak’s poor on-time performance (OTP) on 563 oversimplifies the issue. When you look closer, you see that there is a trickle-down effect that is initially caused by a late departure of Amtrak 763, the first northbound trip of the day, which delays a COASTER train, which then conflicts with the 563. (At the October 26, 2011, Board meeting, staff noted for the Board that Amtrak does not believe this is the case, Train 763 has been late leaving San Diego on five occasions since the February launch).

- Better scheduling will help OTP. A lot of these issues will be resolved with the next schedule change.

- There needs to be a survey to gauge the Express riders’ perception of the service. What marketing activities are being conducted to promote the service?

- The report notes that express train OTP is affected by the new Orange County trains and the Del Mar Races, but this is difficult to understand since these are in the afternoon/evening hours and the express trip is in the morning.
• Also note that a ridership increase was experienced between San Diego and Los Angeles, which is the biggest benefactor of the travel time savings.

• We need to look at the adjacent Metrolink trains to see the full picture of the ridership change. We shifted some passengers to adjacent Amtrak trains, but did the other passengers switch to Metrolink or did they not take a train at all?

• OTP is also affected by the occasional use of the single-level horizon cars on the express train, which require additional dwell times at stations.

• There were Express Train Billboards in San Diego during the launch and promotional materials at the stations. There will be new promotions with the launch of Wi-Fi starting in December and those promotions will continue to have the express train message.

In addition, the Chair and Vice Chair suggest a staff presentation on the assessment at the Board of Directors meeting on November 16, 2011.

Attachment: 1. Train 563’s Performance

Key Staff Contact: Jonathan Hutchison, (510) 238-2651, Hutchij@Amtrak.com
Date          October 11, 2011
To            LOSSAN TAC
From          Jonathan Hutchison
Department     Policy & Development
Subject       Train 563’s Performance

Message

The following summarizes train #563’s (*Pacific Surfliner* express train) performance. This train replaced an all stop service (#565), and was inaugurated on February 15, 2011.

Customer Satisfaction -

Amtrak’s measure of customer satisfaction (CSI) is not available at the individual train level. However, the graph below depicts the CSI score for the *Pacific Surfliner*.

<table>
<thead>
<tr>
<th>Pacific Surfliner CSI</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb-11</td>
<td>90%</td>
</tr>
<tr>
<td>Mar-11</td>
<td>89%</td>
</tr>
<tr>
<td>Apr-11</td>
<td>91%</td>
</tr>
<tr>
<td>May-11</td>
<td>91%</td>
</tr>
<tr>
<td>Jun-11</td>
<td>86%</td>
</tr>
<tr>
<td>Jul-11</td>
<td>92%</td>
</tr>
<tr>
<td>Aug-11</td>
<td>87%</td>
</tr>
<tr>
<td>Average</td>
<td>89%</td>
</tr>
</tbody>
</table>
Train 563 Ticket Type and Revenue -

The table below summarizes the ticket types collected on train #563 from March - August 2011, along with the tickets collected on train #565 during the same period last year.

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Ridership</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amtrak Single Pass</td>
<td>15,729</td>
<td>$388,399</td>
</tr>
<tr>
<td>Amtrak Smart Pass</td>
<td>6,593</td>
<td>$79,220</td>
</tr>
<tr>
<td>Metrolink</td>
<td>10,320</td>
<td>$20,640</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>32,642</strong></td>
<td><strong>$488,259</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Ridership</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amtrak Single Pass</td>
<td>22,502</td>
<td>$472,255</td>
</tr>
<tr>
<td>Amtrak Smart Pass</td>
<td>12,108</td>
<td>$126,601</td>
</tr>
<tr>
<td>Metrolink</td>
<td>19,333</td>
<td>$38,666</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>53,943</strong></td>
<td><strong>$637,522</strong></td>
</tr>
</tbody>
</table>

The dominant city pairs and associated revenues are depicted below for Train #563 from March – August 2011 and Train #565 for the same period in 2010.

<table>
<thead>
<tr>
<th>City Pair</th>
<th>Ridership</th>
<th>Ticket Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles - San Diego</td>
<td>5,602</td>
<td>$170,032</td>
</tr>
<tr>
<td>Los Angeles - Solana Beach</td>
<td>3,485</td>
<td>$93,053</td>
</tr>
<tr>
<td>Los Angeles - Oceanside</td>
<td>2,827</td>
<td>$63,475</td>
</tr>
<tr>
<td>Irvine - Solana Beach</td>
<td>2,698</td>
<td>$28,010</td>
</tr>
<tr>
<td>Irvine - Los Angeles</td>
<td>1,977</td>
<td>$24,852</td>
</tr>
<tr>
<td>Anaheim - San Diego</td>
<td>934</td>
<td>$21,346</td>
</tr>
<tr>
<td>Metrolink ridership</td>
<td>10,320</td>
<td>$20,640</td>
</tr>
<tr>
<td>Irvine - San Diego</td>
<td>963</td>
<td>$16,317</td>
</tr>
<tr>
<td>Anaheim - Solana Beach</td>
<td>933</td>
<td>$14,774</td>
</tr>
<tr>
<td>Anaheim - Los Angeles</td>
<td>1,294</td>
<td>$12,730</td>
</tr>
<tr>
<td>Irvine - Oceanside</td>
<td>571</td>
<td>$6,593</td>
</tr>
<tr>
<td>Anaheim - Oceanside</td>
<td>360</td>
<td>$6,068</td>
</tr>
<tr>
<td>Oceanside - San Diego</td>
<td>121</td>
<td>$1,250</td>
</tr>
<tr>
<td>San Diego - Solana Beach</td>
<td>109</td>
<td>$943</td>
</tr>
<tr>
<td>Other</td>
<td>113</td>
<td>$843</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>32,642</strong></td>
<td><strong>$488,259</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City Pair</th>
<th>Ridership</th>
<th>Ticket Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles - San Diego</td>
<td>5,070</td>
<td>$152,990</td>
</tr>
<tr>
<td>Los Angeles - Solana Beach</td>
<td>3,738</td>
<td>$96,062</td>
</tr>
<tr>
<td>Los Angeles - Oceanside</td>
<td>2,911</td>
<td>$61,152</td>
</tr>
<tr>
<td>Metrolink ridership</td>
<td>19,333</td>
<td>$38,666</td>
</tr>
<tr>
<td>Irvine - Los Angeles</td>
<td>1,924</td>
<td>$23,622</td>
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<tr>
<td>Anaheim - San Diego</td>
<td>1,154</td>
<td>$17,503</td>
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<tr>
<td>Irvine - San Diego</td>
<td>1,934</td>
<td>$15,759</td>
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<tr>
<td>Anaheim - Los Angeles</td>
<td>1,539</td>
<td>$15,146</td>
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<tr>
<td>Irvine - Oceanside</td>
<td>654</td>
<td>$14,084</td>
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<tr>
<td>Anaheim - Oceanside</td>
<td>654</td>
<td>$14,084</td>
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<tr>
<td>San Diego - Solana Beach</td>
<td>1,184</td>
<td>$13,219</td>
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<tr>
<td>Other</td>
<td>8,625</td>
<td>$107,856</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>53,943</strong></td>
<td><strong>$637,522</strong></td>
</tr>
</tbody>
</table>
563’s Impact to Adjacent Amtrak Trains -

The following depicts the changes to adjacent trains’ ridership and revenue since #563’s inauguration.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ridership</td>
<td>Ticket Revenue</td>
<td>Ridership</td>
<td>Ticket Revenue</td>
</tr>
<tr>
<td>Train 763</td>
<td>6:10 AM</td>
<td>109,032$1,590,471</td>
<td>115,889$1,752,089</td>
<td>6% 10%</td>
</tr>
<tr>
<td>Train 563</td>
<td>7:05 AM</td>
<td>-0$0</td>
<td>32,642$488,259</td>
<td>-39% -23%</td>
</tr>
<tr>
<td>Train 565</td>
<td>7:05 AM</td>
<td>53,943$637,522</td>
<td>-</td>
<td>0</td>
</tr>
<tr>
<td>Train 567</td>
<td>8:10 AM</td>
<td>28,306$423,913</td>
<td>32,354$511,379</td>
<td>14% 21%</td>
</tr>
</tbody>
</table>

563’s Reliability -

563’s OTP closely mirrors that of the other Pacific Surfliners departing San Diego. Between February 15, 2011 and September 30, 2011, #563’s OTP was 77.6%. As information, the FY11 OTP for northbound Pacific Surfliners between San Diego and Los Angeles was 77.4%. The factors contributing to #563’s reliability challenges include:

a. Metrolink schedule change effective July 2, 2011 added six additional weekday trains on the Orange County Line, along with meeting commuter trains around San Diego.
b. Increased passenger loads due to Del Mar Racing Season (July 20 – September 7).
c. Restrictions between Los Angeles and San Diego due to ongoing capital improvement projects, including the Carlsbad Double Track project.

In an effort to improve 563’s OTP, Amtrak has reached out to the host railroads reinforcing #563’s importance, and assigned a Road Forman to monitor the train’s daily performance, who has engaged BNSF about routing options to improve reliability.
# Agenda Item #11
**LOSSAN Joint Powers Board**  
**November 16, 2011**

## PROPOSED
### 2012 LOSSAN MEETING SCHEDULE
(All Meetings at LA Metro unless otherwise noted)

| BOARD OF DIRECTORS  
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(4th Wednesday of the Month)</td>
</tr>
<tr>
<td>11:30 AM - 1:30 PM Unless Noted</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Technical Advisory Committee (TAC)</td>
</tr>
<tr>
<td>(2nd Thursday of the Month)</td>
</tr>
<tr>
<td>11:30 AM - 1:30 PM</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>January 12</td>
</tr>
<tr>
<td>January 25</td>
</tr>
<tr>
<td>February 9</td>
</tr>
<tr>
<td>February 22</td>
</tr>
<tr>
<td>March 8</td>
</tr>
<tr>
<td>Friday, March 30</td>
</tr>
<tr>
<td>(Santa Barbara, 10:30-12:30 p.m.)</td>
</tr>
<tr>
<td>April 12</td>
</tr>
<tr>
<td>April 25</td>
</tr>
<tr>
<td>(OCTA, 11:00-1:00 p.m.)</td>
</tr>
<tr>
<td>May 10</td>
</tr>
<tr>
<td>May 23</td>
</tr>
<tr>
<td>June 14</td>
</tr>
<tr>
<td>June 27</td>
</tr>
<tr>
<td>(SANDAG, 9:30-11:30 a.m.)</td>
</tr>
<tr>
<td>July 12</td>
</tr>
<tr>
<td>July 25</td>
</tr>
<tr>
<td>August 9</td>
</tr>
<tr>
<td>Thursday, August 30</td>
</tr>
<tr>
<td>(San Luis Obispo, 12:45-3:00 p.m.)</td>
</tr>
<tr>
<td>September 13</td>
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<tr>
<td>September 26</td>
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<tr>
<td>October 11</td>
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<td>October 24</td>
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<tr>
<td>November 1</td>
</tr>
<tr>
<td>November 14</td>
</tr>
<tr>
<td>December 6</td>
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<tr>
<td>December 19</td>
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</tbody>
</table>

**Staff Contact:**  
Linda Culp  
SANDAG  
401 B Street, Suite 800  
San Diego CA  92101  
lcu@sandag.org  
www.lossan.org

Updated 11/07/2012