



# 2023 Strategic Plan

LOSSAN RAIL  
CORRIDOR AGENCY



MAY 2023



# Creating California's premier transportation experience

**S**outhern California is known for many things. Beautiful weather. Sandy Beaches. World class entertainment venues. Only in Southern California can you surf a wave at Trestles, ride a coaster with Mickey, and watch humpback whales migrate all within a single weekend.

But Southern California is also known for something else – traffic. As many Southern California residents know, travel time plays a large role in determining what leisure activities they will participate in. The Amtrak Pacific Surfliner, under the management of the Los Angeles - San Diego - San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency), provides travelers with a safe, fast, reliable, and comfortable alternative to our car-congested freeways.

The Pacific Surfliner is the busiest state-supported intercity rail service in the United States. Despite that success, we at the LOSSAN Agency understand the ever changing landscape of travel, and know that as the wants and needs of our passengers evolve, we as a service need to evolve as well.

Through a collaborative effort, the Strategic Plan Update was developed as a tool to assist the LOSSAN Agency in maintaining the growth and responsiveness of the Pacific Surfliner service. I would like to extend my sincere appreciation to the LOSSAN Agency staff, Technical Advisory Committee, and Board of Directors for their support and input throughout this process.

By establishing our overarching mission, the vision that anchors us, the goals we strive to achieve, and the objectives that will make those goals a reality, the Strategic Plan will help shape the decisions we make for years to come. It will help the LOSSAN Agency ensure that the Pacific Surfliner is the premier transportation experience in Southern California, both now and in the future.



Jason Jewell  
Managing Director

# Table of Contents

The LOSSAN Strategic Plan Update (Update) is organized into five chapters:

Executive Summary; three chapters organized around the LOSSAN Agency's desired strategic plan outcomes – Maximize Customer Focus, Optimize Operations, and Prioritize Business Sustainability; and a final chapter focused on Fulfilling Our Mission and Vision, describing how the LOSSAN Agency will evolve as a result of the Update.

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# 1. INTRODUCTION

The Strategic Plan Update (Plan) developed by the Los Angeles - San Diego - San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) will help strengthen our organizational capabilities, improve the services we provide, and ensure our passengers continue to have amazing experiences. The Plan uses our vision to create goals and objectives that will serve as the mechanism to guide the LOSSAN Agency in pursuing short, mid, and long-term opportunities and improvements.

The result will help the decisions made and actions taken to better serve our stakeholders and customers and to positively shape the future of transportation in California.

# LOSSAN: Keeping Southern California Moving

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) was created in 1989 to ensure Southern California residents and travelers experienced safe, reliable travel aboard the Amtrak Pacific Surfliner along the 351-mile coastal rail corridor it serves (Figure 1.1).

Since then, the LOSSAN rail corridor has grown tremendously, with the Pacific Surfliner becoming the busiest state-supported intercity rail route in the country. Intercity rail service, along with commuter rail services, plays a critical role in moving more than eight million riders annually within the six-county coastal Southern California region served by the LOSSAN rail corridor.

Today the LOSSAN rail corridor includes 41 stations and more than 150 daily passenger and commuter trains<sup>1</sup> along the route, which stretches from San Luis Obispo County south to San Diego County (Figure 1.2). Its [direct and connecting services](#) include the:

- Amtrak Pacific Surfliner intercity rail service (*LOSSAN Agency managed*)
- COASTER commuter rail service
- Metrolink commuter rail service
- Amtrak Coast Starlight long distance rail service

## Organized for Success

The LOSSAN Agency is a joint-powers authority representing rail owners, operators and planning agencies along the LOSSAN rail corridor and works to increase ridership, revenue, capacity, reliability, and

Figure 1.1: LOSSAN Corridor Map



Figure 1.2: LOSSAN System Map



1 Reflects pre-pandemic service levels

safety on the coastal rail line, with the primary responsibility of managing the daily operations of Amtrak's Pacific Surfliner intercity rail service.

The Orange County Transportation Authority (OCTA) was selected in 2013 to serve as the Managing Agency of the LOSSAN Agency and provides all administrative support to it. In that role, OCTA serves to more effectively manage the service and also aides in identifying and addressing future needs and opportunities that benefit its stakeholders, passengers and their communities more effectively.

In the intervening years, the LOSSAN Agency has greatly strengthened the level and frequency of service it provides in the corridor, which serves the second- and eighth-largest American cities. In addition to the passenger rail service it provides, the LOSSAN rail corridor is also responsible for moving more than \$1 billion in goods and commodities carried annually on [more than 70 freight trains daily](#), and it provides the only reliable freight rail link between San Diego and the rest of the country. Its importance to the region's transportation system is further increased by serving as an alternative for both personal and freight travel, due to paralleling heavily congested stretches of Interstate 5 and Highway 101.

To meet current needs, as well as anticipate future opportunities, the LOSSAN Agency is organized around the knowledge and expertise of its stakeholders and staff. The LOSSAN Agency is governed by an [11-member Board of Directors](#) composed of current and former elected officials. The LOSSAN Agency itself is currently staffed by eighteen employees who are provided by OCTA as the managing agency.

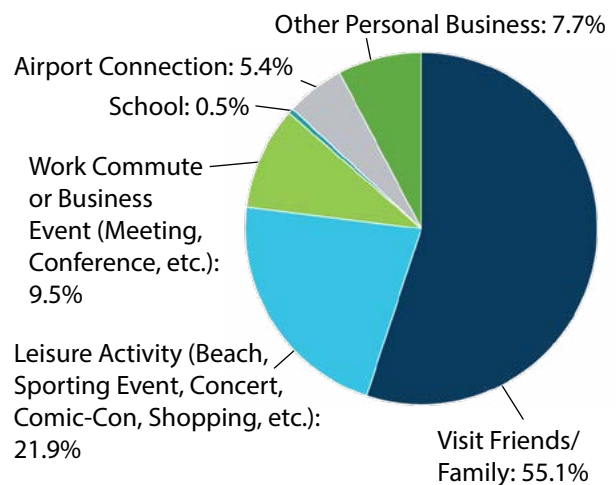
The LOSSAN Agency collaborates with the corridor's complex mix of operators and stakeholders to enhance and improve the

reliability and frequency of service throughout; to optimize existing services and plan for expanded future services; and to ensure the maximum service potential for the entire corridor. This involves coordinating the efforts of five different rail operators and seven right-of-way owners along the corridor.

## Putting People First

The LOSSAN Agency's mobility services play a critically important role in moving people throughout Southern California. Travelers rely on them for fast, reliable connections to jobs, education, family, and - as is especially the case for the Pacific Surfliner - recreation (Figure 1.3).

**Figure 1.3: Surfliner Travelers**



The reliance of Southern Californians on the Pacific Surfliner to get them where they need to go is rooted in the LOSSAN Agency's emphasis on continually improving its ability to provide:

- Customer-focused services and amenities;
- Integrated transportation services within the service area, as well as to other external connections;
- Emphasis on ensuring a safe and secure service; and



- New services and connections reflecting the changing needs and preferences of Pacific Surfliner customers, communities and stakeholders.

The LOSSAN Agency uses these Pacific Surfliner customer motivations to drive service and operational improvements, such as bettering on-time performance, making railcar and facility upgrades, improving onboard services, and other enhancements that reflect the needs of our customer base.

## A History of Success

The roots of the LOSSAN Agency go back to 1985 when the LOSSAN Corridor State Rail Study Group was established to study the rail corridor and recommend capital improvements intended to expand passenger rail service. Four years later, it was transformed into the LOSSAN joint-powers authority (JPA) and given the responsibility of overseeing capital improvement projects along the LOSSAN rail corridor.

Previously, the duties of the LOSSAN Agency were overseen by the California Department of Transportation (Caltrans) Division of Rail and Mass Transportation (DRMT). However,

through a combination of state legislation and the consolidation of various California transportation agencies under the newly created [California State Transportation Agency](#) (CalSTA) led to beginning the process of moving the LOSSAN Agency to local control.

As a result of Senate Bill 1225, the legislation enacted in 2012, the LOSSAN Agency assumed all responsibility for administering the Pacific Surfliner state-funded intercity passenger rail service using the then-existing state resources and managing the contract with Amtrak for service operations.

This action was taken to ensure that regional needs were more effectively identified and addressed. This local governance has produced continual growth, not just on the Pacific Surfliner, but the entire LOSSAN rail corridor (Figure 1.4). This growth stems from:

- More responsive planning and service delivery to maintain and strengthen usage;
- Improved marketing efforts focused on the local and regional markets; and
- Tighter cost controls combined with a new infusion of financial resources over time to fund improvements to rail connectivity and service performance.

Figure 1.4: LOSSAN Corridor Growth

# SINCE 2012...



**ANNUAL TOTAL RIDERSHIP FOR THE CORRIDOR HAS GROWN TO 8.3 MILLION PEOPLE<sup>1</sup>**



**ANNUAL TOTAL RIDERSHIP FOR THE PACIFIC SURFLINER HAS INCREASED TO NEARLY 3 MILLION PEOPLE**



**WEEKLY TRAIN VOLUME HAS RISEN TO MORE THAN 1,600 FREIGHT AND PASSENGER TRAINS**



**FAREBOX RECOVERY HAS IMPROVED FROM 56% TO OVER 72%**



**THE PACIFIC SURFLINER HAS BECOME THE BUSIEST STATE SUPPORTED CORRIDOR IN THE NATION RESPONSIBLE FOR 10% OF AMTRAK NATIONAL RIDERSHIP**



**TRANSFERS TO SELECT LOCAL BUS AND RAIL SERVICES VIA THE TRANSIT TRANSFER PROGRAM AT NO COST TO THE PASSENGER**

<sup>1</sup> Comparison to pre-pandemic peak



## Planning for the Future

To continue this record of success, the LOSSAN Agency undertook an update to its original Strategic Implementation Plan. The LOSSAN Strategic Implementation Plan was developed in 2012 and primarily laid out the vision for the first two years of the LOSSAN Agency's management of the Pacific Surfliner. This update will assist the LOSSAN Agency in maintaining its growth and responsiveness to the Pacific Surfliner customer base and our corridor partners and stakeholders. The Plan helps shape the LOSSAN Agency decision making needed to anticipate and respond to Southern California's growing rail demand, as well as new and changing passenger requirements and preferences.

The Plan will better reflect the LOSSAN Agency's rapidly evolving environment by providing an integrated and comprehensive approach to growing our service operations, improving the quality of our customer experiences, and making us more effective in preserving our environment.

The Plan uses these desired outcomes to create a framework to guide the LOSSAN Agency in pursuing short, mid and long-term challenges and opportunities (Figure 1.5).

The result will ensure the decisions made and actions taken by the LOSSAN Agency will benefit both its stakeholders and Pacific Surfliner customers while we positively shape transportation in California.



Figure 1.5: LOSSAN Challenges and Opportunities

# Future Challenges and Opportunities



## Passengers

Growth in passenger numbers, equity, diversity, travel experience, and desired destinations required expanded amenities, service quality, and frequency.



## Service

Customers and communities continually ask for service and frequency expansions and reliable on-time travel, which create financial, political, and operational risks to be overcome.



## Amenities

Customer amenity demands puts pressure on revenue, fare affordability, and discussion of/communication about them and their benefit-cost ratio.



## Integration

Customers and partners want more “friction-less” travel within the LOSSAN service region, which poses ticketing, funding, and other service challenges.



## Environment

Environmental sustainability and coastal resiliency will increasingly be a driver of the LOSSAN Agency’s operations and cooperation with other rail and transit providers. The issue of coastal bluff destabilization and its effect on operations will impact capital funding priorities.



## Staffing

The LOSSAN Agency’s staffing will need to grow in size, technical capability and decision-making acumen as its operations and challenges grow in complexity.



## Risk Management

As Agency operations grow in size, cost and complexity, the risk management demands put on the LOSSAN Agency’s leadership will grow exponentially.



## Funding

Continuity of service, capacity expansion, and addressing environmental resiliency will depend upon identifying and securing multiple adequate and predictable funding streams.

## Demands are Changing

The demands of Pacific Surfliner customers and LOSSAN Agency stakeholders are constantly changing. This shifting landscape is what in part prompted the update to the Plan. This included establishing the first ever LOSSAN Agency Mission and Vision statements. These will provide a framework for attracting and motivating LOSSAN Agency employees, partners, and customers to reach our shared goals.

Such a framework, for example, would help deliver the customer experience demanded by the leisure travelers that drive the Pacific Surfliner's success. Through the surveys and customer engagement, we know that they want modern amenities that reduce travel hassles while creating positive travel experiences. Examples of this include:

- App based eTicketing;
- High-speed onboard Wi-Fi;
- Real-time train status;
- Regional and sustainably-sourced onboard food and beverage offerings;
- Seamless integration with other mobility networks; and
- Safety and security enhancements.

As the LOSSAN Agency adds service value and quality, Pacific Surfliner customers increasingly ask for rail service expansions, as they find travel by rail more appealing than driving or flying (Figure 1.6).

Meanwhile, the LOSSAN Agency and its partners have their own growing demands, including:

- Reducing auto reliance in favor of rail usage;
- Taking positive steps toward environmental sustainability and climate resiliency;
- Expanding and integrating rail and multi-modal service offerings; and
- Acquiring and maintaining state-of-the-art rail cars and locomotives, along with station, maintenance, and other facilities.

The LOSSAN Agency recognizes that there are also organizational benefits from an effective update to the Plan. It will provide a comprehensive blueprint for how to identify and prioritize the steps needed to:

- Expand service and capacity;
- Strengthen management decision tools;
- Secure reliable revenue streams adequate to fund organizational and operational needs; and
- Set performance measures for improving the services we provide.

**Figure 1.6: Why Travelers Use LOSSAN**

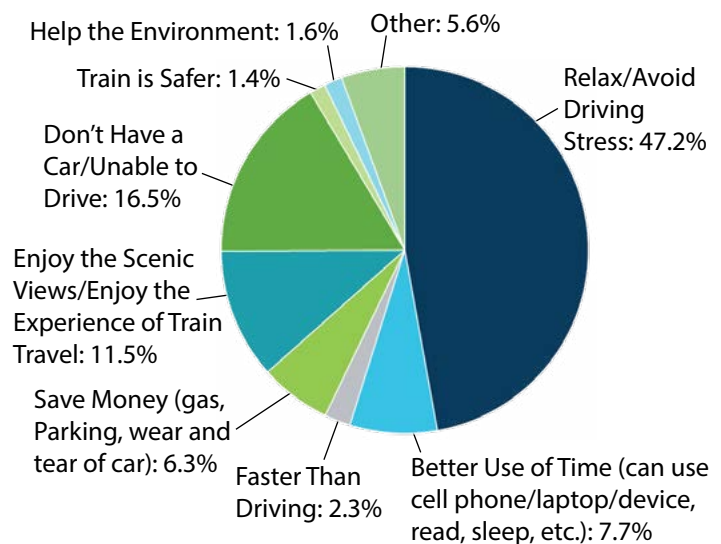
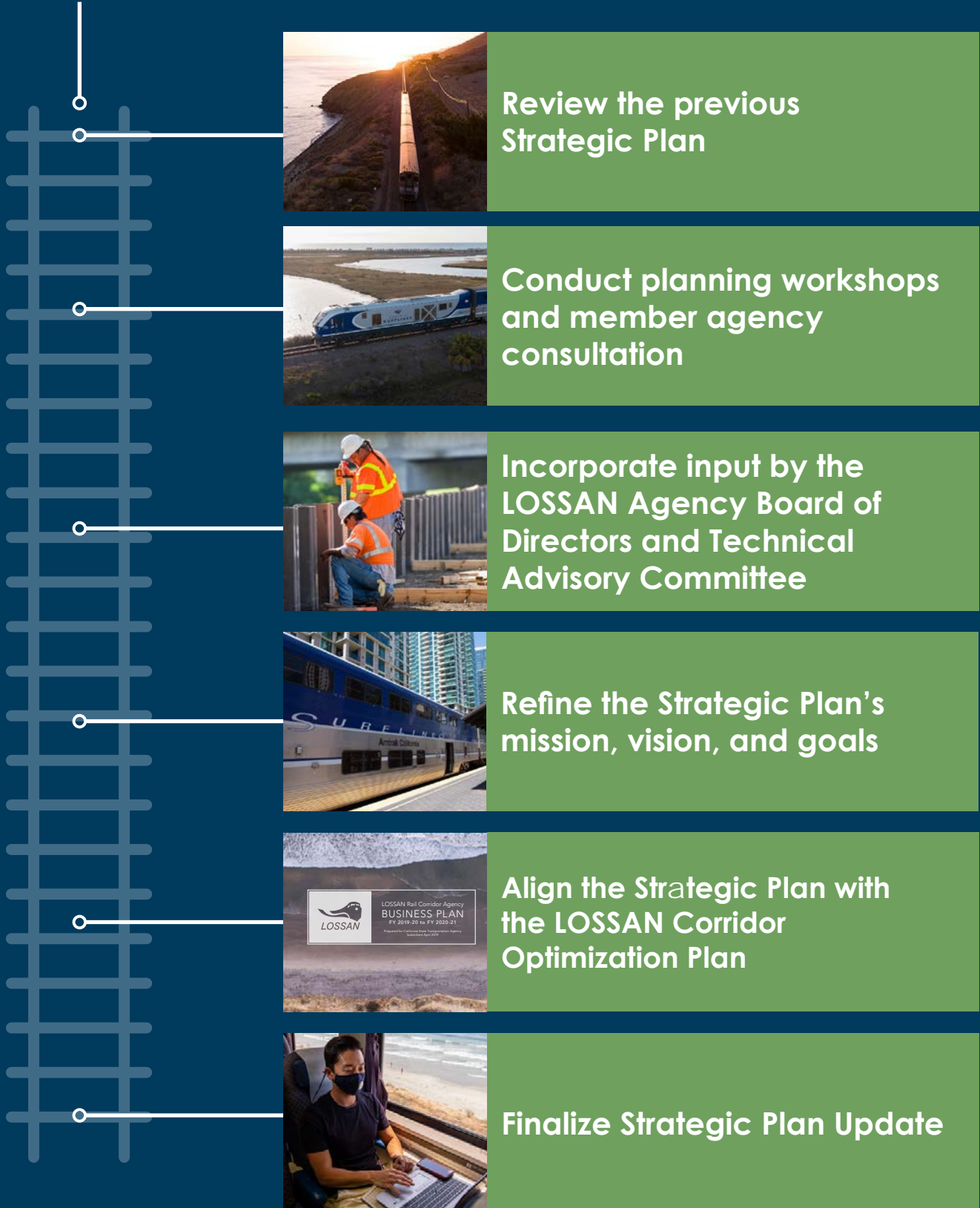


Figure 1.7: Strategic Plan Update Process

# STRATEGIC PLAN DEVELOPMENT



## Crafting the Plan

The LOSSAN Agency began developing the Plan update through a series of workshops held in 2021 and 2022 (Figure 1.7) with both internal staff and external partners. The LOSSAN Agency held these workshops to explore and define the LOSSAN Agency's:

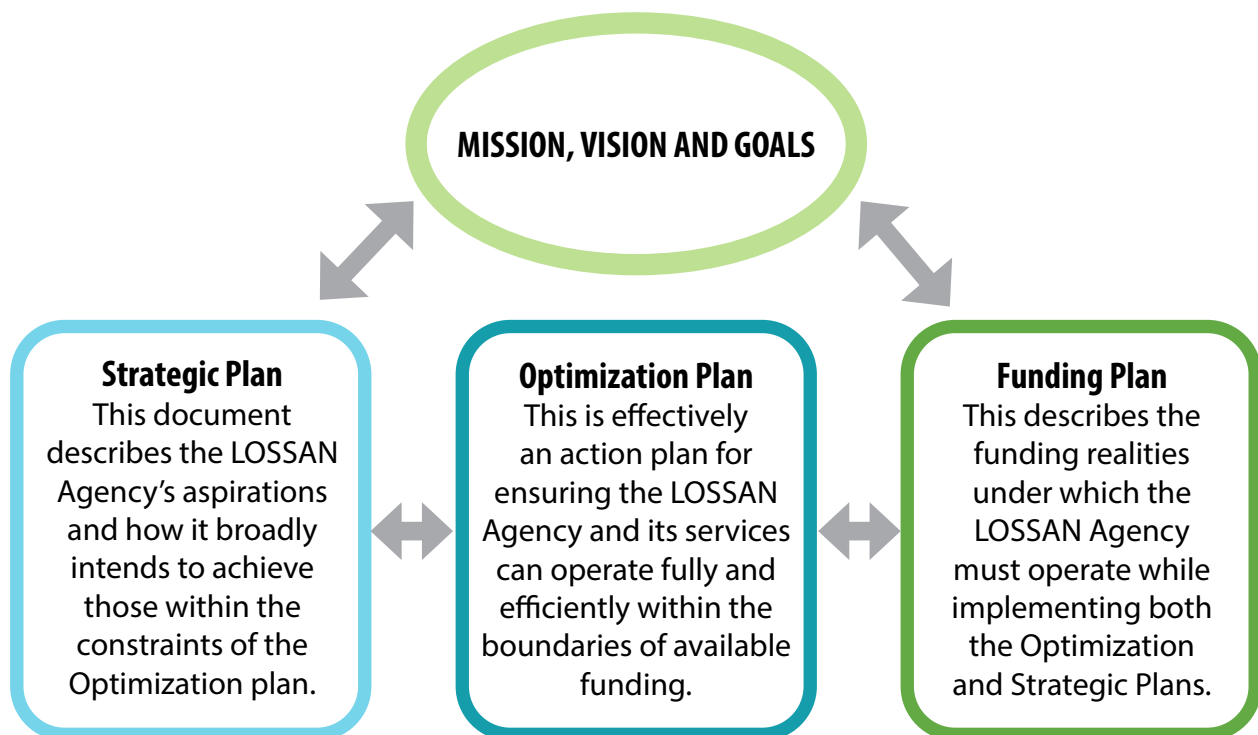
- **Mission** – The Mission is the reason the LOSSAN Agency exists. The values that anchor it and what it does. The Mission serves to attract and motivate employees, partners and customers to act and collaborate on shared goals.
- **Vision** – The Vision embodies the aspirations the LOSSAN Agency has. The Vision captures what it will become in the future and serves as a high-level guide for organizational decision-making.
- **Goals** – The Goals describe general, broad outcomes LOSSAN is striving to achieve to advance the Vision and fulfill its Mission.

- **Objectives** – These are Specific, Measurable, Achievable, Relevant and Time sensitive (SMART) tasks that further refine how best to meet its goals.

During these meetings, the LOSSAN Agency considered how our Mission, Vision and Goals influence and interact with other key organizational decision-making plans, such as the Annual Business Plan, the LOSSAN Corridor Optimization Plan, and our funding constraints (Figure 1.8). We also had to identify and address likely future challenges and opportunities we expected to encounter in the short, medium and long term. These workshops were supplemented with a variety of other inputs, including:

- Results from past public surveys;
- Feedback from the LOSSAN Agency Technical Advisory Committee; and
- Guidance from the LOSSAN Agency Board of Directors.

**Figure 1.8: Alignment of the LOSSAN Agency Plans**



The initiative resulted in the fully defined and integrated Mission, Vision, and Goals (Figure 1.9) along with the associated Objectives (see Appendix) that underpin the Strategic Plan Update.

Over time, these key elements will have a significant and long-standing impact on the LOSSAN Agency and our operations. They will provide a more comprehensive, integrated approach to focusing on:

- Offering a consistently high-quality customer experience;
- Providing easier and more convenient travel solutions;
- Optimizing our operational efficiency; and
- Creating long-term LOSSAN Agency sustainability.

When fully implemented, the Plan will ensure that the LOSSAN Agency continues to deliver a premier, customer-focused transportation system that fully serves the needs of its customers, partners and stakeholders.

## Putting the LOSSAN Agency Vision Into Action

The LOSSAN Agency faces a number of challenges and opportunities in the years ahead:

- The Pacific Surfliner's post-pandemic ridership continues to grow as more Californians take advantage of a travel mode free of the stress and delays of driving on the state's congested highways.

Figure 1.9: Mission, Vision, and Goals

# Mission



To be Southern California's premier transportation experience to the state's most desirable destinations.

# Vision



To be the foundation of Southern California rail travel, fully integrated with our transit partners, and helping travelers create lifelong memories by:

- Providing a high-quality customer experience;
- Achieving world class operations; and
- Ensuring long-term sustainability.

# Desired Strategic Plan Outcomes



Maximize Customer Focus by:

- Improving User Experience;
- Integrating with Destinations;
- Integrating with Transportation Partners; and
- Maintaining Sustainable Fares.

Optimize Operations by:

- Expanding Service;
- Providing Better System Performance; and
- Improving Regional Connectivity.

Prioritize Business Sustainability by:

- Being Fiscally Responsible;
- Being Environmentally Conscious;
- Supporting Equity and Inclusion; and
- Being Leaders in Business Management.

- At the same time, the LOSSAN Agency, our stakeholders, and our customers want to make sure that all are equitably provided opportunities to access and use the Pacific Surfliner.
- Customers continue to look to the LOSSAN Agency to make it easier to connect to other transit networks as they seek out convenience, value, and variety.
- Employers along the LOSSAN rail corridor want mobility choices that help attract and retain high-quality workers, spur economic growth, and provide broader customer access to their goods and services.
- The LOSSAN rail corridor has an ambitious - but largely unfunded - capital improvement program exceeding \$5 billion in needed additional track capacity, station improvements, signal and communications upgrades, safety enhancements, and infrastructure improvements designed to mitigate the climate change crisis.
- Although new federal funding and support for services such as the Pacific Surfliner from the state's Public Transportation Account are in place, the LOSSAN Agency is seeking to secure a stable, long-term source of operating funds that can be relied on to help the Pacific Surfliner continue to deliver high-quality, affordable service to its customers.

The LOSSAN Agency will use the Plan and its key elements to ensure that these challenges and opportunities are well met. Each element will serve a specific function that LOSSAN Agency will use regularly in our day-to-day and long-term decision making and actions. New policies and procedures will be developed following official Board adoption of the Plan. In general, however, these will be deployed, monitored, and reported on as follows:

- **Mission** – the LOSSAN Agency will use this as a guide to ensure decisions and policies help fulfill our reason for existing as an agency. It will come into play regularly in governance meetings, long-range and operational planning, and in the development of organizational policies.
- **Vision** – the LOSSAN Agency's Vision statement will serve as a guide for prioritizing staff efforts over the next few years as programs and initiatives are implemented in the short- to mid-term timeframe. It provides a benchmark to be incorporated into these efforts early in the planning stages to determine whether the efforts effectively advance the LOSSAN Agency's Mission and warrant the investment of organizational resources.
- **Goals** – The Plan's goals describe general, broad outcomes the LOSSAN Agency is striving to achieve to advance our Vision and fulfill our Mission. The LOSSAN Agency will use these on a day-to-day basis to prioritize their actions, identify unmet needs, and assign resources to where they make a meaningful difference.

“We succeed through efforts like this, efforts that help us improve our service to Southern Californians in ways that are meaningful to them.”

JASON JEWELL  
Managing Director



- **Objectives** – The 11 Objectives developed as part of this process, along with their accompanying Specific, Measurable, Achievable, Relevant, and Time-sensitive (SMART) tasks, allow us to define in a quantitative way how well the LOSSAN Agency is performing at achieving its goals and advancing its Vision and Mission. These will be used throughout the organization as a way of monitoring in real time how well the LOSSAN Agency is performing, where improvements need to be made, and where achievements can be both communicated and celebrated. The measuring and reporting of objectives and performance against them helps build internal commitment to important tasks, as well as strengthen external support for important LOSSAN Agency goals.

Fundamentally, the Strategic Plan Update helps LOSSAN employ key principals and take results-oriented actions today to better anticipate and manage prospective changes in its markets and the environment tomorrow.





## 2. MAXIMIZE CUSTOMER FOCUS

The Strategic Plan outlines near, mid, and long-term recommendations that enable the LOSSAN Agency to achieve the goal of ensuring customers enjoy a superior transportation experience. This will be achieved through amazing amenities, incredible destinations, and seamless connections to other transportation systems.

This approach ensures that the passenger experience is second to none, and ensures riders will rely on the LOSSAN Agency for their Southern California travel needs, regardless of the destination or purpose of their trip.

## It All Begins with the Customer

Meeting and even exceeding our passengers expectations not only is the right thing to do, but also makes good business sense. Passengers who are happy with the service they have received return time and again. They generate the positive referrals and build the favorable reputation that makes our service attractive to new riders.

Such a simple, foundational principle is what motivates the LOSSAN Agency to provide one of the nation's premier rail services for Pacific Surfliner passengers. However, with so many options available to travelers, the

LOSSAN Agency understands the need to find new ways to maximize our customer focus, ensuring the Pacific Surfliner remains the service passengers consistently select for their elective travel.

After nearly a year of internal discussion and external stakeholder consultation, the LOSSAN Agency identified “maximizing customer focus” as one of our foundational goals for organizational success. From this goal, four key objectives were distilled. (Table 2.1) From these objectives, SMART tasks were developed that, when completed, would lead the LOSSAN Agency toward fulfilling our customer focus goal.

**Table 2.1: Maximize Customer Focus Goal**

Goal: Maximize Customer Focus							
Objectives							
Improving the Customer Experience		Integrating with Destinations	Integrating with Transportation Partners	Maintaining Sustainable Fares			
<b>S</b>	Deliver high-quality service to our customers	<b>S</b>	Assess departure/destination impacts in all business process development and decision-making	<b>S</b>	Identify service gaps/integrations needed for connections and first/last mile	<b>S</b>	Define what constitutes a sustainable fare structure between user expectations, marketplace conditions and organizational needs.
<b>M</b>	90% of customers in surveys respond that the overall trip was of high or very high quality	<b>M</b>	Increase the number of departure/destination partnerships	<b>M</b>	Increase the number of transportation service partnerships with existing partnerships as a baseline	<b>M</b>	Measure sustainable fare value balance via periodic price acceptance studies.
<b>A</b>	Implement Board actions focusing on customer service and ways to improve the user experience	<b>A</b>	Identify and pursue customer focused pre- and post-trip destination partnerships	<b>A</b>	Develop and implement prioritized need-focused action plans to address gaps	<b>A</b>	Conduct periodic price acceptance studies to develop dynamic fare structure and trigger points for fare or service increases.
<b>R</b>	Identify revenue sources for adequately funding actions to achieve goal (equipment improvements, technology solutions, etc.)	<b>R</b>	Identify appropriate number of desired partnerships and the resources necessary for pursuing	<b>R</b>	Integrate action plans into service planning activities	<b>R</b>	Integrate studies, timing and required LOSSAN Agency actions, if any, into Strategic Plan.
<b>T</b>	Establish implementation timeline as part of the Annual Work Plan	<b>T</b>	Establish implementation timeline as part of the Annual Work Plan	<b>T</b>	Establish implementation timeline as part of the Annual Work Plan	<b>T</b>	Establish implementation timeline as part of the Annual Work Plan

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

## OBJECTIVE: Improving the Customer Experience

The LOSSAN Agency's focus on the quality of its customers' experience has made the Pacific Surfliner California's most successful state-supported intercity passenger rail service. It is also the busiest state-supported rail service in the entire Amtrak national system, carrying over 2.8 million passengers annually (pre-pandemic).

Pacific Surfliner customers consistently rate their travel experience as being of a high or very high quality; that fact is key to their continued use of - and reliance on - intercity rail to meet their travel needs. The benefits of rail travel over travel in a personal vehicle include less traffic, a safer trip, and less of an environmental impact. These benefits, combined with reduced travel time and increased comfort, helps passengers make the choice of rail service over car use.

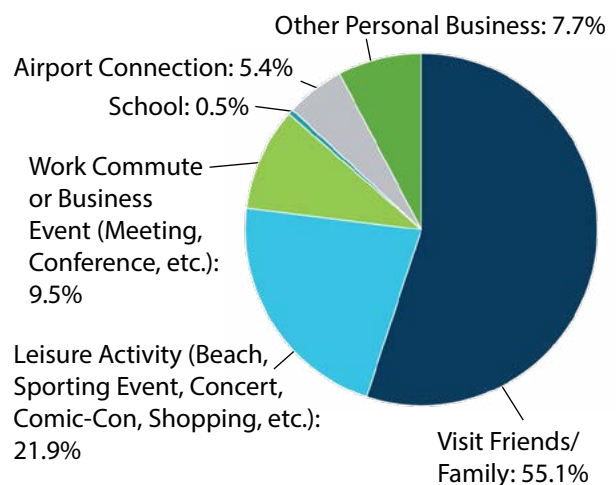
Even satisfied rail customers, however, look for new and added value from service providers they rely on. In the case of the Pacific Surfliner, they look for better, more customized services; improved reliability and on-time performance; integrated ticketing that allows for seamless connections to other transit services; and real-time service updates via mobile app or in-station signage. Potential new customers - who may just be establishing their rail travel habits or are drawn by destinations or services not previously offered - may bring new expectations and market demands. To strengthen their brand loyalty requires us to continually understand the needs and preferences of both new and regular customers, and respond to them quickly and thoughtfully.

This is especially true given the nature of travel for the majority of the Pacific Surfliners' customers. As shown in Figure 2.1<sup>1</sup> over 75 percent of riders are engaging in some sort of leisure or elective travel. That gives them significant flexibility regarding their departure times, travel modes, amount of money spent, and other factors. This puts the pressure on the LOSSAN Agency to provide continued service and amenity improvements in order to both retain and expand that share of discretionary travel dollars.

### Changing Demographics and Demands

Through 2027, the LOSSAN Agency's planned expansion (Table 2.2) in in the number of rail trips provided by the Pacific Surfliner is expected to outpace growth in its service area's population, per capita income, employment, and transit demand (Table 2.3).

**Figure 2.1: Pacific Surfliner Travelers**



<sup>1</sup> Amtrak Survey, January 2022

**Table 2.2: Long-Term Service Assumptions by Corridor**

Service		Baseline	Proposed	
Pacific Surfliner	SAN-LAX (San Diego – Los Angeles)		13 round trips	18 round trips
	Goleta	SAN-GTA (San Diego – Goleta)	4 round trips	7 round trips
		LAX-GTA (Los Angeles – Goleta)	5 round trips	8 round trips
	San Luis Obispo	SAN-SLO (San Diego – San Luis Obispo)	2 round trips	3 round trips
		LAX-SLO (Los Angeles – San Luis Obispo)		4 round trips
Coast connection at SLO		Rail/Bus - Train and bus via SLO. Alternating bus or train every 2 hours.		
Santa Clarita connection		Every other SAN-LAX train runs to Santa Clarita		
Coachella Valley connection		Rail - 5 round train trips per day to Coachella		
San Diego connection to Yuma		Bus - 2 round trips to Yuma		

LOSSAN Rail Corridor Optimization Study, 2021

**Table 2.3: Socioeconomic and Intercity Travel Demand Growth (2019-2027)**

County	2019-2027 Growth%			
	Population	Income/Person	Employment	Commuting Trips
<b>BY LOSSAN COUNTY</b>				
San Luis Obispo	12%	11%	14%	16%
Santa Barbara	7%	12%	12%	13%
Ventura	9%	11%	13%	14%
Los Angeles	5%	13%	10%	11%
Orange	9%	12%	14%	14%
San Diego	9%	11%	12%	14%
<b>OVERALL</b>				
LOSSAN County's Subtotal	7%	12%	12%	12%
Other County's Subtotal	9%	11%	13%	14%
Statewide Total	8%	12%	12%	13%

Caltrans and Steers, April 2022

**Table 2.4: Projected LOSSAN Growth**

Scenario	Annual Total		
	Ridership	Ticket Revenue	Passenger Miles
Existing Conditions (2019)	2,776,700		
2027 Baseline	3,236,300	92,510,000	289,320,000
2027 Proposed	3,936,300	119,838,000	396,719,000
Growth % - 2019 vs. 2027 Baseline	17%		
Growth % - 2019 vs. 2027 Proposed	42%		
Growth % - Baseline vs. Proposed	22%	30%	37%

LOSSAN Ridership Study, 2022

This combination of increased rail capacity and population growth translates into significant potential ridership and ticket revenue increases for the Pacific Surfliner (Table 2.4). Through 2045, the region encompassing the LOSSAN rail corridor is expected to add 3.7 million people, 1.6 million households and 1.6 million jobs through a combination of natural increase, domestic migration, and immigration<sup>2</sup>. The region's population on average is expected to become older, better educated, wealthier, more diverse - and more likely to be part of smaller or single-member households.

As a result, Pacific Surfliner customers likely will be looking to us to help them connect with a broader, more diverse set of destinations. Their choices will be less affected by cost or time constraints as our customer base ages. With that aging, our customer base is likely growing wealthier and accruing more vacation time or moving into retirement. And, based on extensive tourism industry research<sup>3,4,5</sup>, more often affected by (rail-favoring) interests in travel modes and destinations that involve:

- Convenience;
- Higher cost-benefit rewards
- Social interaction as desired; and
- Memorable/unique experiences.

The LOSSAN Agency's plans for service expansion include broader integration with regional and state transportation networks that will expand the reach of the Pacific Surfliner, introducing further changes in its customer base, as well as their needs and preferences. In the future, the LOSSAN Agency is looking to service three new emerging corridors: the Coast Corridor Route, the Salinas Extension, and the Coachella Valley Route (Figure 2.2).

**Figure 2.2: Emerging Corridors**



2 Demographics and Growth Forecast, Southern California Association of Governments, 2020

3 Age-Related Decision Factors in Destination Choice for United State Tourists, 2001

4 Effects of Gender Differences on Perceptions of Destination Attributes, Motivations, and Travel Values: An Examination of a Nature-Based Resort Destination, 2008

5 A Study on the Driving Factors of Tourism Destination Brand Equity Based on Internet Sharing Content, 2018

## Matching Amenities to Customer Demands

The LOSSAN Agency continues to work with Amtrak to enhance amenities and improve the overall passenger experience aboard the Pacific Surfliner. It is these amenities that differentiate the Pacific Surfliner and set it apart as the premier travel option in Southern California. Enhancements will include continuing to improve connectivity aboard the train by upgrading Wi-Fi, providing delicious and locally sourced food and beverage options, and providing upgraded business class accommodations. These enhancements, along with other services riders demand, will ensure our passengers continue to view the Pacific Surfliner as their preferred mode of leisure travel.

Examples of potential amenity additions to be explored through implementation of the Strategic Plan Update include:

- Upgrading Café service in terms of vendor partnerships, offering a more varied food and product portfolio while supporting local businesses, increasing healthy and lifestyle based food options (Keto, Vegan, etc.), implementation of QR code menus and app based ordering, and at-seat food and beverage service in our Business Class.
- Expanding bicycle storage on the Pacific Surfliner while making it easier for bicyclists to make storage reservations.
- Enabling Amtrak multi-ride ticket holders, and potentially Metrolink Rail2Rail passengers, to make bicycle storage reservations electronically.
- Strengthening the reliability and capability of the Pacific Surfliner's complimentary Wi-Fi service to accommodate the increasing amount of high-bandwidth activities routinely engaged in by passengers for both business and entertainment purposes.

- Exploring opportunities for providing customers with real-time access to convenient and easily understood information about the Pacific Surfliner. Real time information related to train status and available seating on specific trains will help in making travel decisions.

The clarity and availability of train-status information is particularly important to customer satisfaction. Amtrak currently provides train status information through a number of channels, including announcements at staffed stations, Passenger Information Display System signs on station platforms, and online through the "train status" feature on Amtrak.com and the Amtrak mobile app. This is supplemented by the LOSSAN Agency with real-time service alerts on the @PacSurfliners Twitter channel. Service notifications sent via Twitter include delays and possible delays, potential crowded trains along with alternate trains that have more capacity, and general information related to conditions along the LOSSAN rail corridor that could impact travel.

We will continue investigating ways to further enhance train status updates and integrate them with new and existing communication channels. We will also explore ticketing improvements designed to increase the convenience and comfort of its customers, including:

- Providing real-time capacity information to passengers during the booking process indicating how full a particular Pacific Surfliner train is expected to be based on current reservations. This will potentially enable passengers who have flexibility to shift their travel from peak-capacity trains to less-crowded trains.
- Improving the available integrated ticketing options for Pacific Surfliner customers to facilitate booking trips end to end,

including first and last mile connections to their desired destinations. This includes services operated by other agencies, such as the Metro Rail system in Los Angeles, and potentially even rideshare services such as Lyft or Uber.

- Continuing the marketing and funding of the Pacific Surfliner Transit Transfer Program, which enables a passenger with valid fare media to transfer for free to a connecting bus or shuttle operated by participating transit agencies.

### ***Improving Station Wayfinding and Maintenance***

There are eight million passengers<sup>6</sup> riding on more than 150 daily trains moving through the 41 stations along the LOSSAN rail corridor. Each one brings a different level of comfort and familiarity with using the region's rail and bus network to complete their planned trip comfortably and successfully. The ease with

which they can navigate to and from their train or connection will go a long way towards a sense of satisfaction about their trip and the quality of the service that was provided. That ease of navigation should exist at all stations, regardless of layout or how busy it is.

To this end, the LOSSAN Agency has long emphasized making sure that signage and other wayfinding devices are provided to effectively guide the public to and through stations, onto the correct train platform, and then out to the community or to other connecting transit systems. The LOSSAN Agency's intent is to continue focusing on improving the ease of public transportation use through such efforts as:

- Coordinating signage design and layout with station owners and other partner agencies to build consistency throughout the corridor.
- Expanded involvement in the Station Host program. Through the Station Host initiative, ambassadors are present at select Pacific Surfliner stations. These trained volunteers provide service-related information, particularly at stations shared with Metrolink and/or COASTER, and direct passengers to the correct station platform. They are currently in place in San Luis Obispo, and the LOSSAN Agency has already had preliminary discussions with the Station Host Association on expanding their reach further south.
- As part of the Board approved Capital Improvement Program, implement an enhanced wayfinding signage initiative at all Pacific Surfliner stations.

**"Two things you can count on when a traveler feels lost on a trip. They'll only make that trip again reluctantly. And they'll tell everyone they know how much they hated what confused them."**

**ROGER LOPEZ**  
Administrative Officer

<sup>6</sup> Pre-pandemic statistics

## The Organizational Challenges and Opportunities of Maximizing Customer Focus

The LOSSAN Agency's changing customer base and the differences these customers bring highlight the benefits of continually evolving as a marketing organization as well as a transit provider.

The LOSSAN Agency already employs traditional marketing and advertising efforts, and is growing its community outreach programs to increase market share and brand awareness, especially among new and potential customers. It also involves combining new communication tools and partnerships to simultaneously reach out to individuals looking for new experiences while helping them feel more comfortable about traveling by rail if they have never or seldom used it in the past.

One such example is the partnership the LOSSAN Agency struck with collegiate sports teams promoting the use of the Pacific Surfliner's student discount, in an effort to promote student ridership to college and university sporting events along its route. Such outreach must strike a balance between focusing on the ease of booking a trip, ticketing flexibility, and sources of information that travelers can refer to during their trip, while not losing sight of maintaining the excitement about the destination that first motivated the trip planning process.

But as the LOSSAN Agency's customers grow more diverse in service and destination wants, we also need to become equally diverse in our offerings. Keeping pace with changing customer needs - and remaining competitive for their travel expenditures - will require adapting a marketing-focused approach to developing and implementing new amenities, services and other enhancements (Figure 2.3). Doing this will require working with the LOSSAN Agency Board to:

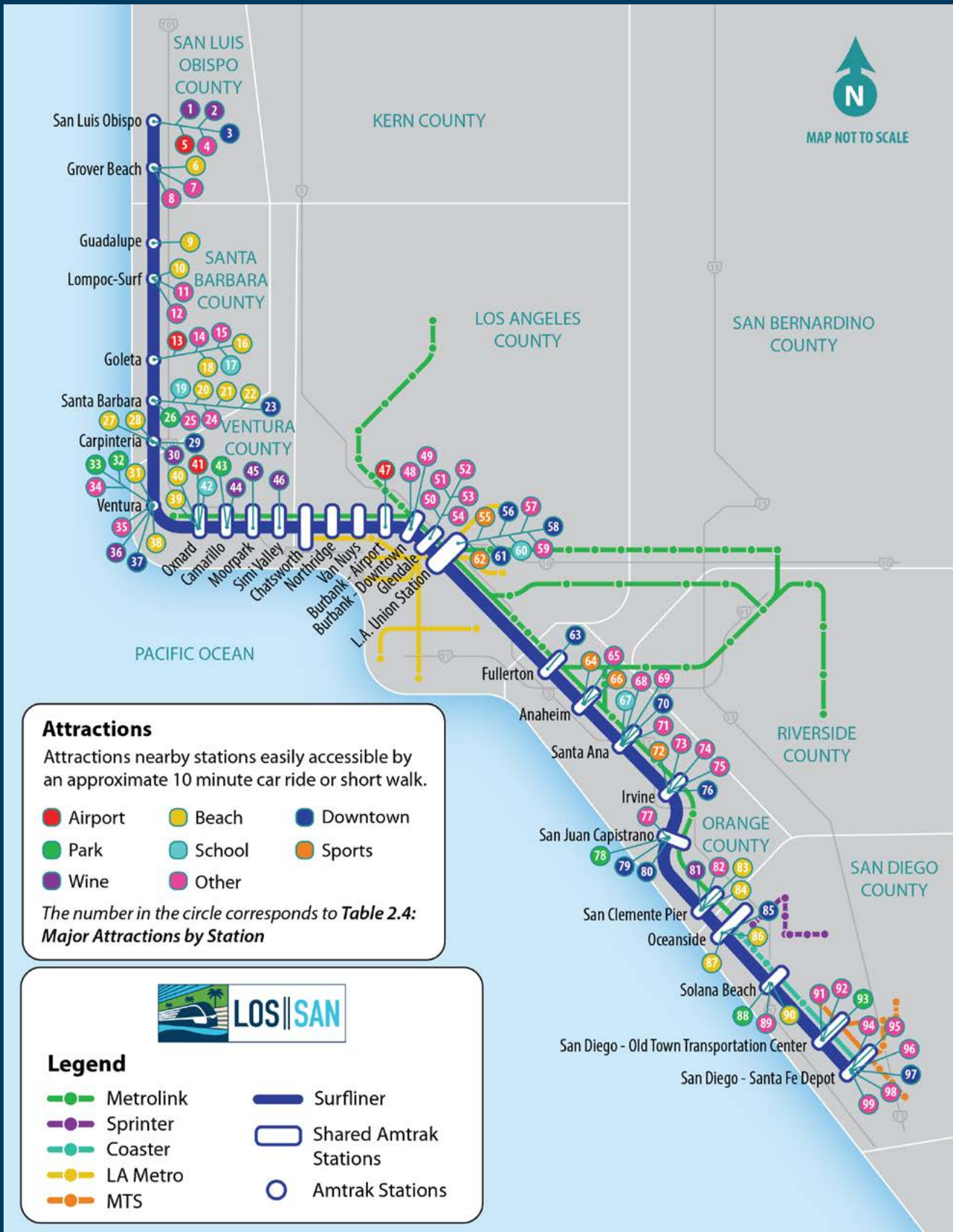
- Examine how to better identify and act upon ways to attract customers and improve their experiences;
- Find sustainable revenue sources for adequately funding service expansions, equipment improvements, and technology solutions as a means of maximizing the user experience; and
- Developing an implementation timeline that can be logically integrated into the LOSSAN Agency's annual business plan, capital improvement plan, annual workplan, and any other pertinent planning documents.

**Figure 2.3: Customer Services and Amenities Consultation**





Figure 2.4: Station Proximity to Potential Destination Partnerships



## OBJECTIVE: Integrating with Destinations

Getting away from it all is big business for Southern California, as well as for the LOSSAN Agency.

California is the most-visited state in America<sup>7</sup>. Southern California is home to three of the country's top-25 tourist stops and hundreds of other regional special events and attractions. Many of these destination are located close to stations along the LOSSAN rail corridor and are conveniently served by the Pacific Surfliner.

The LOSSAN Agency has long worked to expand existing or establish new Pacific Surfliner service to special events that draw large crowds. These events include: the Del Mar Race Season, San Diego Comic-Con International, major sporting events, local concerts and music festivals, and major holiday-related activities. The LOSSAN Agency has also worked diligently to develop joint promotions by coordinating marketing efforts with local convention and visitors bureaus, other transit agencies, and major attraction destinations along the Pacific Surfliner route. Examples from previous years include successful collaborations with organizations such as the San Diego Padres, Anaheim Ducks, Los Angeles Angels, the San Diego Zoo, Live Nation, Visit Santa Barbara, and the Disneyland Resort.

The LOSSAN Agency will continue to pursue and expand its successful partnerships and explore enhanced loyalty programs of its own and in cooperation with destinations and attractions. The potential new and expanded partnerships provide an exciting opportunity for expanding Pacific Surfliner service and increasing revenues without increasing fares or having to add new equipment (Table 2.4).

There are a number of potential destination partnerships that have yet to be explored. These could include, for example, a San Luis Obispo connection to the California Mid-State Fair. Other partnerships to explore include the Santa Barbara Zoo, Warner Brothers Studios, and many more possibilities as shown in Figure 2.4 and listed in Table 2.4. The map shows where destinations are located along the LOSSAN corridor, while the table shows which destinations correspond to each stop. The destinations listed are not intended to be exhaustive, but rather illustrative of the potential partnerships along the LOSSAN corridor.

Increasing the amenities and benefits offered within these partnerships can serve as an important tool for reaching new audiences and capturing interest in using the Pacific Surfliner. The positive impacts of these partnerships can be further broadened by integrating with local transit agencies to provide easier connections to and from Pacific Surfliner stations. These additional first/last mile partnerships can also assist travelers in getting to our local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport. This will build upon the existing direct connection to Hollywood Burbank Airport. Perhaps most importantly, these benefits can be achieved with minimal additional cost, using existing rolling stock and stations while sharing marketing and staffing costs with other entities.

<sup>7</sup> World Atlas, 2018

**Table 2.4: Potential Partnerships by Station**

Station	Ref. Number	Attraction	Attraction Type
SAN LUIS OBISPO	1	Wineries in downtown Paso Robles (via bus connection)	Wine
	2	Wineries in downtown San Luis Obispo	Wine
	3	Downtown San Luis Obispo	Downtown
	4	California Mid-State Fair in Paso Robles (via bus connection)	Other
	5	San Luis Obispo County Regional Airport	Airport
GROVER BEACH	6	Grover Beach Side	Beach
	7	Pismo Beach Golf Course	Other
	8	Pismo Marsh	Other
GUADALUPE	9	Rancho Guadalupe Dunes Preserve	Beach
LOMPOC-SURF	10	Surf Beach	Beach
	11	La Purisima Golf Course	Other
	12	Ocean Park	Other
GOLETA STATION	13	Santa Barbara Airport	Airport
	14	South Coast Railroad Museum	Other
	15	Ellwood Butterfly Preserve	Other
	16	Goleta Beach Park	Beach
	17	University of California - Santa Barbara	College
	18	Campus Point Beach	Beach
SANTA BARBARA	19	Santa Barbara City College	College
	20	West Beach	Beach
	21	East Beach	Beach
	22	Stearns Wharf	Other
	23	Downtown Santa Barbara	Downtown
	24	Funk Zone	Other
	25	Santa Barbara Zoo	Other
	26	Chase Palm Park	Park
CARPINTERIA	27	Carpinteria City Beach	Beach
	28	Carpinteria State Beach	Beach
	29	Downtown Carpinteria	Downtown
	30	Downtown Carpinteria - Wine Tastings and Wineries	Wine
VENTURA	31	Surfers Point Dunes	Beach
	32	Seaside Wilderness Park	Park
	33	Surfers Point at Seaside Park	Park
	34	Ventura Raceway	Other
	35	Ventura County Fairgrounds	Other
	36	Wine Ed-Ventures Wine Tours	Wine
	37	Downtown Ventura	Downtown
	38	San Buenaventura State Beach	Beach
OXNARD	39	Oxnard State Beach Park	Beach
	40	Channel Island Beach	Beach
	41	Oxnard Airport	Airport
	42	Oxnard College	College

Station	Ref. Number	Attraction	Attraction Type
CAMARILLO	43	Pleasant Valley Fields	Park
	44	Wineries and Cellars	Wine
MOORPARK	45	Cavalettie Vineyards	Wine
SIMI VALLEY	46	The Vineyards Venue	Wine
CHATSWORTH			
VAN NUYS			
BURBANK (AIRPORT & DOWNTOWN)	47	Hollywood Burbank Airport	Airport
	48	Warner Brothers Studio tour	Other
	49	Martial Arts History Museum	Other
GLENDALE	50	Glendale Cemetary	Other
	51	Los Angeles Zoo	Other
	52	Griffith Observatory	Other
	53	The Greek Theatre	Other
	54	Hollywood Sign	Other
L.A. UNION STATION	55	Dodger Stadium	Sports
	56	Chinatown	Downtown
	57	LA Live Entertainment District	Other
	58	Little Tokyo	Downtown
	59	Crypto Arena	Other
	60	University of Southern California Health Sciences Campus	College
	61	Downtown Los Angeles	Downtown
	62	Crypto.com Arena	Sports
FULLERTON	63	Downtown Fullerton	Downtown
ANAHEIM	64	Angel Stadium of Anaheim	Sports
	65	Disneyland Resort	Other
	66	Honda Center	Sports
SANTA ANA	67	Santa Ana College	College
	68	Bowers Museum	Other
	69	Discovery Cube Orange County	Other
	70	Santa Ana Downtown	Downtown
	71	Santa Ana Zoo	Other
IRVINE	72	Great Park Sports Complex	Sports
	73	FivePoint Amphitheatre	Other
	74	Musical Theatre Village	Other
	75	Irvine Technolgy Center	Other
	76	Irvine Spectrum Center	Downtown
SAN JUAN CAPISTRANO	77	Zoomars at River Street Ranch	Other
	78	Los Rios Park	Park
	79	Los Rios Street Historic District	Downtown
	80	Downtown San Juan Capistrano	Downtown

Station	Ref. Number	Attraction	Attraction Type
SAN CLEMENTE PIER	81	Rancho Capistrano Winery	Wine
	82	San Clemente Pier	Other
	83	San Clemente Beach Trail	Beach
	84	T-Street Beach	Beach
OCEANSIDE	85	Downtown Oceanside	Downtown
	86	Oceanside Municipal Fishing Pier	Beach
	87	Oceanside Harbor Beach	Beach
SOLANA BEACH	88	Tide Beach Park	Park
	89	Del Mar Fairgrounds	Other
	90	Fletcher Cove Beach Park	Beach
SAN DIEGO – OLD TOWN	91	SeaWorld San Diego	Other
	92	Snapdragon Stadium	Other
	93	Old Town San Diego State Historic Park	Park
SAN DIEGO – SANTA FE DEPOT	94	Broadway Pier	Other
	95	Convention Center	Other
	96	Petco Park	Other
	97	Downtown San Diego	Downtown
	98	Maritime Museum of San Diego	Other
	99	San Diego Zoo	Other

## The Organizational Challenges and Opportunities of Integrating Destinations

More than \$5 billion in unfunded capital needs have been identified on various portions of the LOSSAN rail corridor, including additional track capacity, station improvements, and signal and communications improvements. These and other needs may, on a case-by-case basis, impose natural limitations on the number and size of specific destination-integration initiatives. On the other hand, market demand may make it easier for the LOSSAN Agency to pursue funding opportunities that bring benefits to the larger rail corridor and, by extension, these destination-specific efforts.

A related challenge involves on-time performance (OTP). If a passenger is less than confident they will depart or arrive on time, they are less likely to use the service to get them to their destination. This is an important measure of service quality and passenger satisfaction for the Pacific Surfliner service.

The LOSSAN Agency has been making steady progress in recent years (Table 2.5) towards the state-mandated goal of 90 percent OTP. A focus on destination integration likely means even greater attention will be required within operational planning to ensure reliable and predictable rail service for the leisure and business traveler.

Reliable service is a strong motivator for potential passengers, and this element could be turned into a marketing point of differentiation for the Pacific Surfliner a time when two of its competitors - airlines and regional highways - are projected to struggle in the years ahead in getting people where they want to go when they want to get there.

**Table 2.5: On-Time Performance**

FFY	Endpoint OTP
2014-15	77.9%
2015-16	78.0%
2016-17	68.7%
2017-18	77.2%
2018-19	71.0%
2019-20	83.6%
2020-21	86.0%

*Source: The LOSSAN Agency, 2021*

Finally, successful destination and activity-based partnerships require thorough planning to ensure that the resources and processes are in place for the LOSSAN Agency to:

- Anticipate customer needs across many different tourist segments driven by demographics, experience preferences and point of origin;
- Create positive interactions at every stage of the business process where customers come into contact with the Pacific Surfliner; and
- Seek out and respond to customer feedback in positive, timely ways.



## OBJECTIVE: Integrating with Transportation Partners

Population growth, changing demographics, and unanticipated shifts in employment or residential clusters will put a premium on further strengthening the Pacific Surfliner's links with transportation partners to meet existing and emerging transportation needs.

Employers will look to the LOSSAN Agency and its partners to create ever-more efficient ways of transporting their employees to and from work. Travelers will seek new ways of traveling that gives them greater control over both obligatory and discretionary trips. Taxpayers, communities, and other stakeholders will want assurances that the transportation network is being optimized with an appropriate level of investment.

One strength which the LOSSAN Agency brings to these challenges and opportunities is our existing network of partnerships and working relationships with other transportation

providers (Table 2.6). It creates an environment in which multiple partners are collaboratively involved in identifying and filling service gaps, such as the need for first mile/last mile connections, using the available organizational resources and expertise. Some of the existing bus and rail services provide easy and convenient transfers for passengers and can provide first/last mile connections. The services include (but are not limited to):

- East San Fernando Valley LRT
- Metro bus and rail network, including the new Regional Connector
- OC streetcar (pending completion)
- COASTER train service
- San Diego Trolley

The shared goals of these organizations is to increase ridership through faster, more efficient, better integrated train schedules; improved network reliability; better transit connectivity; and better service and amenities that improves customer satisfaction.

## Current Integration Efforts and Likely Evolution

The LOSSAN Agency works closely with CalSTA, Caltrans DRMT, and transit and rail operators along the LOSSAN rail corridor, along with other stakeholders on efforts to improve regional rail and transit connections. This improves the existing services offered by the Pacific Surfliner, and also helps to set the stage for greater coordination and integration of transportation services statewide.

This includes working to create a network with coordinated schedules that easily allows passengers to seamlessly transfer from service to service to reach their desired destinations. The LOSSAN Agency will continue to work with partner agencies to improve rail service through service optimization and modeling efforts, joint funding pursuits, and coordinated ticketing and dispatch policies (Figure 2.7). These ongoing efforts include:

### Integrated Ticketing

Integrated ticketing between transit agencies and providers is foundational to seamless regional travel. When fully implemented, integrated ticketing creates an environment in which the organizations involved in the multi-step travel chain can:

- Make the multi-service ticketing process invisible and seamless to the traveler.
- Allows agencies to coordinate service more closely so as to increase destination, departure time, and travel length choices for travelers.
- Distribute revenues accurately and equitably to the service providers involved in any trip.
- Identify service gaps, investment needs and appropriate investment levels.
- Explore new or alternative solutions to

“The trip travelers want to take time and again is the one where they enjoy the travel as much as the destination.”

**PUJA THOMAS-PATEL**  
Manager, Marketing & Communications

persistent service gaps, such as first/last mile connections.

The LOSSAN Agency will continue moving forward with integrated ticketing concepts in collaboration with Caltrans DRMT, LA Metro, Metrolink, and NCTD. These efforts will work to create a standard user friendly interface for passengers to purchase tickets and transfer between services along the LOSSAN rail corridor. This will include looking at ways to incorporate real-time, pertinent travel information to customers and to optimize system operations and investments more effectively.

### Improved Multi-System Coordination

The LOSSAN Agency will continue to partner with member agencies in coordinating improved communications and connectivity with local transit operators, as well as help establish timed connections between Pacific Surfliner trains and connecting transit services for first and last mile connections. The LOSSAN Agency will also continue its ongoing work with partners to strengthen on-time performance through operational and dispatching improvements.



**Table 2.6: LOSSAN Agency Members**

Member Agencies	
 San Diego Metropolitan Transit System (SDMTS)	 San Diego Association of Governments (SANDAG)
 North County Transit District (NCTD)	 OCTA
 Riverside County Transportation Commission (RCTC)	 Los Angeles County Metropolitan Transportation Authority (Metro)
 Ventura County Transportation Commission (VCTC)	 Santa Barbara County Association of Governments (SBCAG)
 San Luis Obispo Council of Governments (SLOCOG)	
Ex-Officio Members	
 Amtrak	 California Department of Transportation (Caltrans) Division of Rail and Mass Transportation (DRMT)
 California High-Speed Rail Authority (CHSRA)	 Southern California Association of Governments (SCAG)

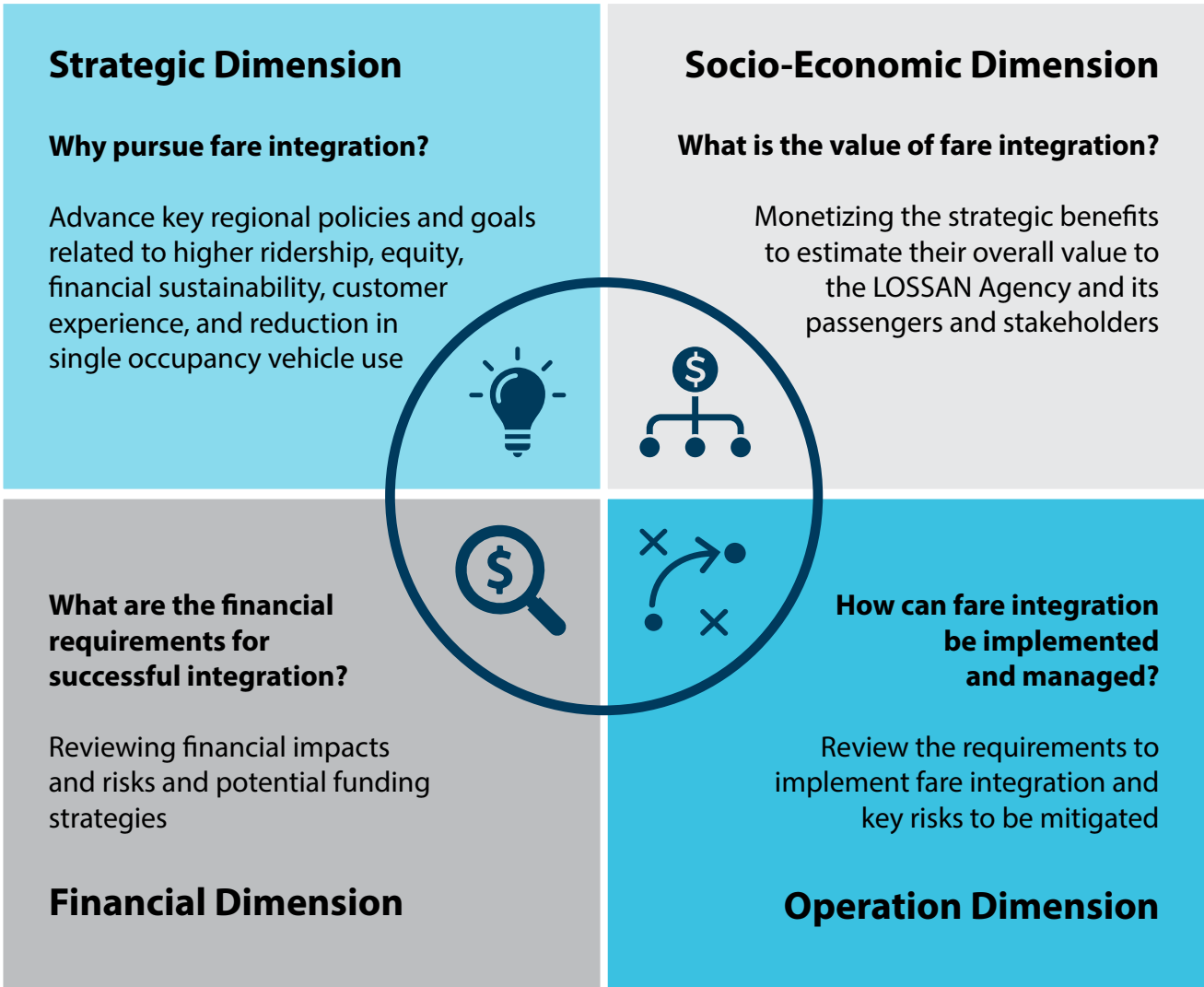
## Potential Integrations and How They Could Affect LOSSAN

### Emerging Corridors

The LOSSAN Agency continues working with member agencies to study and pursue expansion opportunities within Southern California. Currently, the primary focus is on creating connectivity to eastern communities in Riverside County and the Coachella Valley, as well as to coastal communities beyond our current terminus in San Luis Obispo and north along the Coastal route to the San Francisco Bay Area. Though not yet identified as a priority by the LOSSAN Agency Board, the 2023 State Rail Plan includes the Metrolink Antelope Valley Line as a possible future intercity rail corridor. Connections like these and the system improvements they motivate will contribute to the LOSSAN rail corridor’s continued success, support future statewide and regional rail operations, and provide enhanced connectivity with local transit systems.

**Figure 2.5: Evaluating Fare Integration**

Examining the Value, Benefits, Risks, and Requirements



## Performance Incentives

The LOSSAN Agency continues to administer incentive agreements with its host railroads to improve OTP. An incentive agreement was executed with NCTD in July 2019, and a franchise access fee and incentive agreement was executed with UPRR in October 2022. These agreements provide financial incentives to the host railroads to help maintain and improve the current infrastructure and level of OTP. The LOSSAN Agency seeks to explore using this strategic tool with other partners, corridors, and services when they make sense and funding is available.

## Amtrak Thruway Bus Service

Pacific Surfliner rail service is supplemented by the LOSSAN Agency-managed, state-funded Amtrak Thruway bus routes that connect passengers throughout the LOSSAN rail corridor and beyond (Figure 2.6).

Amtrak contracts with private bus operators to provide this service, including both operating staff and vehicles. The bus routes function as part of the Pacific Surfliner service, with coordinated connections, guaranteed seating, integrated fares and ticketing procedures, and inclusion in Amtrak's central information and reservation system in the same manner as trains.

The LOSSAN Agency is reviewing potential opportunities for adjusting or expanding Thruway bus services and will coordinate with our partner agencies in developing potential schedules for improving or expanding the service.

*“An integrated transit system creates customer comfort and confidence in ways that increase ridership, the value of transit investments, and support for future expansions.”*

**JAMES CAMPBELL**  
Operations Officer

## Organizational Challenges of Integrating with Partners

Passenger rail services along the LOSSAN rail corridor act as a backbone for transportation throughout the California coastal region. As such, the LOSSAN Agency will continue to work with member agencies, local communities, and stakeholder organizations to:

- Build awareness of passenger rail services along the corridor.
- Develop strategic partnerships to better evolve the services to meet local needs.
- Increase awareness of these services, especially among local officials and their constituents, to build support for implementing customer- and stakeholder-desired operational improvements and policies.

Although it already has the distinction of being the second-busiest intercity passenger rail service in the United States this approach recognizes that the Pacific Surfliner has significant potential for increased ridership and revenue.

In 2019, the LOSSAN Agency conducted a service optimization study of the entire corridor to identify opportunities for expanding the number of roundtrips between San Diego and Los Angeles, Goleta, and San Luis Obispo respectively. Near-term recommendations of the study, such as the implementation of a pulsed or clockface schedule, were partially implemented in late 2021 as part of our ongoing efforts to align service growth to regional service needs and objectives, as well as with California State Rail Plan goals.

The LOSSAN Agency will further coordinate with its partners to increase the frequency and reliability of services operating along the LOSSAN rail corridor. This coordination will involve identifying opportunities for further service and operational integration, especially when doing so assists in better identifying and evaluating root causes for major delays, crew and equipment utilization, and improvements to service disruption responses and recovery.

One challenge is that the LOSSAN Agency's ability to expand Pacific Surfliner service has historically been constrained by funding, equipment availability, existing access and shared-use agreements with its host railroads, and other situation-specific factors. We combine efforts like this Strategic Plan Update, the recent Corridor Optimization study, the Annual Business Plan, and the Capital Improvement Plan to develop an integrated, comprehensive view of priority needs and the funding required to meet them. As identified priorities often exceed available funding, the situation can be further complicated by new or rapidly emerging issues (such as the impacts of the first two years of the COVID-19 pandemic).

**Figure 2.6: Amtrak Thruway Bus Routes**



This is where integration between the LOSSAN Agency and our partners is helpful for maintaining progress on the corridor. The LOSSAN Agency's projects and policy initiatives are supplemented by additional capital projects that have been identified or programmed by our member agencies. We will continue to expand and strengthen collaborative policy, planning, and improvement efforts with existing and new partners to leverage resources towards improving the LOSSAN rail corridor's efficiency and effectiveness in serving regional needs.

Such collaboration also helps potentially pave the way to state and federal funding for LOSSAN projects and programs. The passage of the Infrastructure Investment and Jobs Act (IIJA) in November 2021 created an unprecedented opportunity for expanding intercity passenger rail throughout the U.S., to the potential benefit of the LOSSAN Agency and its customers and constituencies. Through 2026, the legislation authorizes as much as a 667 percent annual increase in general fund revenues and "advanced appropriations" for Federal Railroad Administration (FRA) programs that:

- Will produce an increase in funding from approximately \$3 billion per year to up to just over \$20 billion annually through FY 2026.
- Expand and promote eligibility for intercity passenger rail to include new services as well as investments in safety and the state of good repair for existing systems.
- Increase intercity passenger rail eligibility beyond rail-specific FRA funding programs to include several multimodal federal programs.

Similar to available state funding, the majority of IIJA funding for intercity passenger rail is discretionary. That means that the LOSSAN Agency must compete with project sponsors across the state (and country) to secure these

grant funds. Our success in this area depends upon fully understanding these programs and their requirements to ensure the LOSSAN Agency's project applications are competitive.

The LOSSAN Agency projects should fare well under federal policies around these new and increased funding programs, which aim to support multi-agency rail projects that:

- Address resilience and climate change by ensuring that a project "reduces emissions, promotes energy efficiency, increases resiliency, and recycles or redevelops existing infrastructure."
- Transform the nation's transportation infrastructure, meaning "the extent to which the project adds capacity to congested corridors, builds new connections and ensures assets will be improved to a state of good repair."
- Achieve equitable economic strength, including the "creation of good jobs with fair wages, labor protections and the opportunity to join a union...and provides opportunities for families to achieve economic security through rail industry employment."

The LOSSAN Agency will devote resources to tapping into these expanded federal and state funding mechanisms. Since transportation policy and funding approaches historically carry over into subsequent federal transportation funding reauthorization measures, it is likely that these capabilities will be useful to the LOSSAN Agency even in years following the 2026 expiration of the IIJA.

## OBJECTIVE: Maintaining Sustainable Fares

When it comes to fares, the LOSSAN Agency must strike a delicate balance for the Pacific Surfliner. Our service offers a premium travel option that calls for, and even requires, premium pricing for sustainability. At the same time, the LOSSAN Agency understands it must also address partner and community imperatives to ensure fare affordability. Fares that are accessible to all help support broader access to jobs, education, healthcare, and other services, as well as cultural and recreational facilities.

These potentially opposing forces impose a need to define in a multi-faceted way what constitutes a sustainable fare structure that reflects user expectations, marketplace conditions, and organizational needs. This sustainable fare definition will need to take into account the imperative to add or enhance services and amenities appealing to the main customer bases of the Pacific Surfliner, while also opening up the possibility of attracting new customers.

### Current Fare Structure

Pacific Surfliner trains currently offer travel in unreserved coach class and reserved business class. Fares are largely static year-round with the exception of slight increases on select holidays during peak travel periods. Business class requires an advanced train-specific reservation for a nominal upcharge fee, dependent on the length of the trip, with a minimum upgrade of \$10. In addition to a guaranteed seat, business class also provides a beverage, snack pack, newspaper, and service from a dedicated train attendant on most trains.

The LOSSAN Agency also offers a variety of discounted ticket types available on the Pacific Surfliner based on type and/or number of trips, timing and frequency of use, and passenger type (e.g. senior citizens, military veterans and other classifications). The Pacific Surfliner also offers discounted multi-ride tickets, discounts for group travel, as well as the Rail 2 Rail Program that allows Metrolink and COASTER commuter rail pass holders to ride Pacific Surfliner trains at no additional cost, subject to certain restrictions. Additionally, the LOSSAN Agency occasionally partners with local destinations and convention and visitors bureaus to offer special discounts for travel to a specific destination.

“Our region is uniquely committed to rail and transit, and the IJA will help us better support important capital investments to better serve our customers.”

JASON JEWELL  
Managing Director

### Defining Sustainable Fares

The LOSSAN Agency understands that a sustainable fare policy starts with a strong definition of goals and values, as is included in this Strategic Plan. Additionally, it is understood that setting fares is not a one-time activity. It is an ongoing process that requires regular evaluation and attention to ensure that the fare policy achieves broader goals, primary beneficiaries (the riders) pay a reasonable share of costs, and sufficient ticket revenue is generated to limit state subsidy costs.

This is an important consideration for the LOSSAN Agency, as the Pacific Surfliner is similar to 98% of rail and transit operators nationally in that fares do not fully support our operations. Since the early 2000s, for example, ridership on the Pacific Surfliner service has increased significantly, and farebox recovery has continually exceeded 50 percent (in non-COVID years). Even so, state subsidies from the Public Transportation Account, which is primarily supported through the state sales tax on diesel fuel, are required.

In recent years, the successful restructuring of Pacific Surfliner fares - and subsequent increase to our farebox recovery - implies that there remains positive fare price elasticity

in our current services and customer base. Paired with the destination and transportation integration impacts noted previously, the LOSSAN Agency should be able to continue improving our farebox recovery by continuing or expanding our efforts to:

- Increase public awareness of existing California Everyday discounts.
- Implement fare promotions as appropriate to encourage riders to return even as the COVID pandemic and its impacts continue, especially in terms of encouraging midweek travel and travel between underutilized station pairs.
- Enhance customer loyalty and referral programs, including the Amtrak Guest Rewards program, to retain existing customers and attract new riders. The LOSSAN Agency is currently in the process of developing the groundwork for our own customer rewards program.
- Explore fare integration opportunities along the corridor, focusing on first and last mile and direct connections to popular destinations.
- Explore a demand pricing model for implementation aboard the Pacific Surfliner. A demand pricing model has the potential to address equity issues by lowering fares on off-peak train travel.

Figure 2.7: Continuum of Implementation Options



In the longer term, the LOSSAN Agency will continue to consult with its customers through online surveys, targeted intercept surveys, and social media interaction to help determine the value they see, as well as what that value is worth, as they make their transportation service choices. The LOSSAN Agency will look for opportunities to rethink fare collection practices and streamline payment options to benefit itself, its customers, and its communities.

In the end, a sustainable fare structure for the Pacific Surfliner will be the one that:

- Attracts the most customers.
- Maximizes the return on investment in transit spending.
- Decreases the use of environmentally intensive transportation options.

The LOSSAN Agency will continue defining fare sustainability by collecting, analyzing and acting on up-to-date ridership, cost of operations, and demographic data.

### ***Opportunities for Modifying Fares***

Although fares on the Pacific Surfliner have not seen an increase since 2013, the LOSSAN Agency periodically examines opportunities for modifying fares when doing so incentivizes ridership, travel pre-payment, and customer convenience. One such initiative that is currently being examined is a demand pricing model. Recent survey data has supported the idea that travel patterns, including the time of day that travel is made, can be heavily influenced by cost. A demand pricing model would mirror to a certain extent the successful pricing methods followed by airlines, but in a much more simple and transparent way. The Pacific Surfliner has a number of “peak period” trains that routinely are standing room only, while other trains operating at times outside of those periods have considerable capacity. A demand pricing model would in general reduce fares for anyone with enough flexibility in their travel plans to utilize these off-peak trains. Though this technically reduces incoming ticket revenue, the resulting ridership increase more than compensates.

In addition to the demand pricing model, there is the potential to offer certain premium amenities at an additional charge, similar to what is practiced by airlines. Premium amenities could include things such as specific seat selection (e.g. an ocean facing view), the ability to have in seat ordering and delivery of Cafe Car items, or even higher speed Wi-Fi (than the standard Wi-Fi available on current trains) available at an additional charge. This gives passengers the opportunity to pay for the amenities that are the most important to them, while making basic travel and amenities more accessible to our community. Additionally, any fare structure modifications can be supported with periodic price acceptance studies to help ensure our fares remain sustainable.





**Organizational and Other Challenges with Maintaining Sustainable Fares**

The financial underpinnings of fares set by the LOSSAN Agency are constantly changing for many reasons. As became clear through the COVID-19 pandemic, ridership may suddenly change due to social, economic, environmental, or other factors. The source, requirements, and amount of funding available may also change for the same reasons. Technology may disrupt existing or introduce new modes of transportation. New system needs may be immediately mandated by legislation, operational failures, or other unpredictable, non-recurring events.

As a result, the LOSSAN Agency is focused on measuring and managing metrics that enable us to effectively evaluate our fiscal performance, especially metrics related to farebox recovery rate, passenger fares, government-assisted funding/subsidies, or reimbursable expenditures. This is also performed for operational elements (e.g. compensation, operating ratio, debt service) to make sure we are efficiently and effectively investing fare revenue and government subsidies.

**Table 2.7: Fare Revenue Opportunities, Challenges and Other Considerations**

Opportunities	Challenges	Other Considerations
<ul style="list-style-type: none"> <li>• Improved in-demand services and amenities</li> <li>• Enhanced quality of life and environmental benefits</li> <li>• Improved performance (faster boarding and reliability) options</li> <li>• Technology-reduced cost of fare collection</li> <li>• Destination and marketing fare tie-ins</li> </ul>	<ul style="list-style-type: none"> <li>• Inadvertent customer reductions/diversions</li> <li>• Operational needs associated with increased ridership</li> <li>• Increased sensitivity to economic changes</li> <li>• Subsidy reductions in response to - but not matched with - revenue increases</li> <li>• Long-term financial sustainability of revenue replacement</li> </ul>	<ul style="list-style-type: none"> <li>• Coordination with partners</li> <li>• Regional cohesion</li> <li>• Changes in mode share</li> <li>• Experimental/pilot versus permanent fare programs</li> <li>• Interactions between zero-fare and fare-collecting transit systems</li> </ul>

## Next Steps

In the years ahead, the LOSSAN Agency will continue to focus on providing a premier, customer-focused rail service that excels in amenities, destinations and integration with other transportation systems. It will do so by undertaking actions focused on better understanding and delivering on customer, partner, and organizational needs, including:

1. Refining our understanding of the needs of current and prospective customers, as well as definitions of what constitutes a premier service for them.
2. Prioritizing expansions and improvements for services and amenities to retain and expand the share of discretionary travel dollars that the Pacific Surfliner attracts.
3. Expanding service to high-demand areas that can be logically and efficiently serviced by the Pacific Surfliner and its partners, as well as integrating with them in ways that provide more efficient travel.
4. Offering new and expanded opportunities for real-time access to convenient, easily understood train service, schedule, and other information when making travel decisions.
5. Broadening the range of integrated ticketing options for customers traveling on the Pacific Surfliner to connect easily with the trains and buses operated by other transportation agencies, making non-auto travel choices more viable for a broader range of Californians.
6. Leveraging our existing network of partnerships and successful working relationships with them to collaboratively identify and fill service gaps, especially the need for first mile/last mile connections.
7. Exploring wider connections to transportation options throughout the State and beyond to better serve Pacific Surfliner passengers and strengthen its role as a major hub for regional travel.
8. Working with host railroads to improve safety, service frequency, and on-time performance as operational and customer service imperatives.
9. Addressing important customer and organizational goals and preferences while maintaining a sustainable and equitable fare structure appropriate to our focus on providing premium service.

These actions, along with others, will ensure that our passengers enjoy high-quality travel to the destinations that are most enjoyable and meaningful to them. They will also demonstrate how the LOSSAN Agency has achieved sustained improvements in our ability to provide the type of travel that matters to our customers.



## 3. OPTIMIZE OPERATIONS

The Operational Service Plan outlines near-, mid- and long-term recommendations for steps the LOSSAN Agency will explore to strengthen its ability to provide comprehensive and coordinated service to customers through better, more frequent service and convenient transfers between rail services and other forms of transit. This operational vision will consider and integrate as appropriate the agencies and railroads that share the LOSSAN rail corridor: Amtrak, [Southern California Regional Rail Authority \(SCRRA\)](#) Metrolink, [North County Transit District \(NCDT\)](#) Coaster Service, and freight operations from [Union Pacific Railroad \(UPRR\)](#) and the [BNSF Railway Company \(BNSF\)](#).

## Striving to Better Serve LOSSAN Customers and Stakeholders

Continually optimizing operations to better serve our existing and prospective customers is a key emphasis area within the LOSSAN Agency's Strategic Plan Update. The importance of providing better service, performance, and connectivity cannot be overstated, as it provides real world benefits to the customers we serve.

Additionally, the LOSSAN Agency takes seriously its responsibility to operate our service in line with the statewide [California State Rail Plan](#) (SRP). When the 2023 state rail plan update is completed, the LOSSAN Agency will explore opportunities for supporting it by optimizing operations in three categories of operations:

1. SERVICE EXPANSION - Expand the frequency of existing service, including special event trains, along with the necessary rolling stock and crew, by both maximizing the efficiency of existing infrastructure coupled with additional capacity enhancing improvements.
2. PERFORMANCE ENHANCEMENTS - Improve on-time performance (OTP) and reliability to better serve and retain existing customers, make it easier to attract new customers and, in the process, create sustainable farebox revenues.
3. IMPROVING CONNECTIVITY - Increase regional train service to more destinations and broaden connectivity with other rail and bus services to increase ridership and support state and national visions for a greater interconnected rail system.

**Table 3.1** provides a detailed framework of how these three objectives can achieve the goal of optimizing operations using the SMART goal system.

“LOSSAN supports the California vision of a single, statewide, interconnected rail system that promotes increased personal mobility, economic vitality, and quality of life.”

JAMES CAMPBELL  
Operations Officer

**Table 3.1: SMART Tasks**

Goal: Optimize Operations					
Objectives					
Expanding Service		Providing Better System Performance		Improving Regional Connectivity	
<b>S</b>	Increase train frequency to hourly round trips south of LA and two-hour round trips north of LA	<b>S</b>	Improve on-time performance and increase ridership and revenue	<b>S</b>	Increase regional train service to more destinations.
<b>M</b>	Schedule 18 bi-directional trains daily south of LA and nine (9) bi-directional trains daily north of LA and include increased special event trains	<b>M</b>	Measure on-time performance, ridership and revenue based on performance metrics as dictated by the interagency transfer agreement	<b>M</b>	Expand or establish service to new destinations and special events
<b>A</b>	Develop and implement an action plan for purchasing more rolling stock and hiring/training the requisite number of crew	<b>A</b>	Purchase specific LOSSAN trip planning software.	<b>A</b>	Develop and implement an action plan, schedule and defined funding source(s) for adding or expanding to top 5 area or destination.
<b>R</b>	Incorporate action plan and defined funding source(s) into Strategic Plan	<b>R</b>	Identify organizational strategies and potential trigger points for improving on-time performance and ridership	<b>R</b>	Incorporate action plan, schedule and defined funding source(s) into Strategic Plan.
<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

## Optimization Challenges

As envisioned in the Strategic Plan Update and other LOSSAN Agency planning and operational documents, optimization strategies in the years ahead will require ongoing investments in corridor improvements, maintenance facilities, and equipment needs. On-time performance (OTP) has fluctuated over the past several years, primarily due to the COVID-19 pandemic, but has improved significantly coming out of the pandemic and should continue to do so if planned investments and improvements are made.

Historically, the ability to expand Pacific Surfliner service has been constrained by both equipment availability and existing access and shared-use agreements with the host railroads on which the service operates. However, the LOSSAN Agency continues to work collaboratively with Caltrans and Amtrak on identifying the equipment and crews necessary to implement additional service, particularly when funding levels and ridership growth present an opportunity to restore pre-COVID-19 service levels.

### OBJECTIVE #1: Strategically Pursuing Service Expansion

As the region continues to grow in population and employment, demand for rail transit also grows. Over the next decade, Caltrans has projected as much as a 25 percent increase in the number of rail trips made in the Southern California region.

Responding to these demands in a timely, effective, and responsible fashion will help sustain the LOSSAN Agency’s success and support future statewide and regional rail operations. One of the ways to meet these demands is through service expansion, which simply means more trains, greater train frequencies, and service line extensions. This will require:

- More siding and double track
- More equipment and crews
- New layover facilities

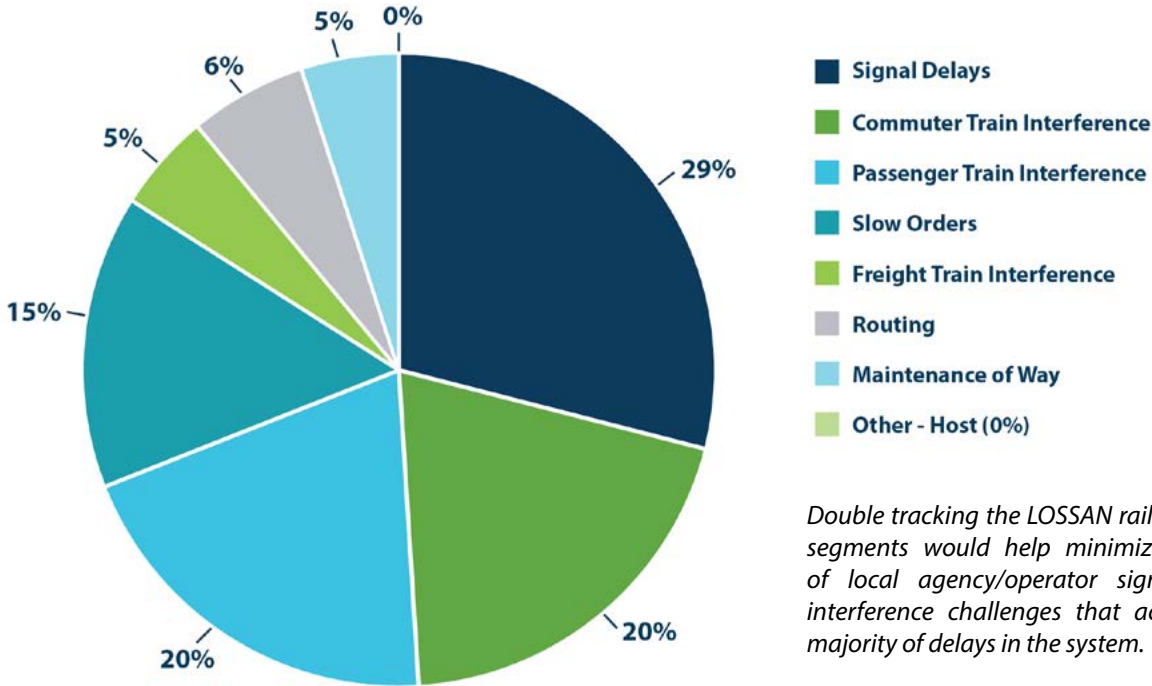
- Better coordination between host railroads
- More staff and training
- Funding commitments from the state

### Rail Capacity Enhancements

Because much of the LOSSAN rail corridor is single tracked, planned service expansions are limited by the lack of passing sidings or second main tracks within the corridor. Addressing the track issues, along with needed station, signal and communications improvements, adds up to more than \$5 billion in unfunded capital needs.

To address these and future capacity limitations, the LOSSAN Agency will continue collaborating with its member agencies and others to pursue local, state, and federal funding opportunities. Each member agency or host railroad is responsible for implementing its respective capital improvement projects to address its specific delay and capacity issues (Figure 3.1) that affect OTP and potential expansion.

FIGURE 3.1: Types of Host-Responsible Delays



*Double tracking the LOSSAN rail corridor in key segments would help minimize the impacts of local agency/operator signal and train interference challenges that account for the majority of delays in the system.*

However, the LOSSAN Agency takes a lead role in coordinating corridor-wide funding pursuits. As such, we will look for future funding opportunities to advance capital projects that have a corridor-wide benefit for OTP, capacity, and expansion.

By increasing the amount of double tracking in the corridor over time, the LOSSAN Agency will give operators the capacity to add more trains, increase service, and provide an alternative to driving that is even more attractive.

### ***Better Serving Customers and Communities at the Stations***

The LOSSAN Strategic Plan Update envisions that regional population growth, new service corridors, and increased destinations likely will mean expanding the number of rail stations served in the years ahead.

### **Stations and Connections**

Currently, the Pacific Surfliner serves 27 stations between San Luis Obispo and San Diego, with limited service provided at Northridge, Burbank Downtown, and San Clemente Pier stations. New locations will be considered based on new services, coordination with other rail and transit providers, and the addition of new destinations that may require either permanent or event-specific stations. For example, the LOSSAN Agency will continue working to expand service from Pacific Surfliner stations to local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport (the Pacific Surfliner currently provides direct service to Hollywood Burbank Airport).

### **Wayfinding Improvements**

As stations are improved or added, continuous improvement initiatives will focus on station

**“Our goal is to ensure that stations do not become ‘choke points’ that throttle back customer satisfaction, stakeholder support, or overall system performance.”**

**JAY ELLIS**  
Operations Compliance  
Officer

and related passenger information, wayfinding signage, and safety improvements. This is of particular concern because 19 of the stations served by the Pacific Surfliner are shared with other passenger rail operators (Metrolink or NCTD), and 26 of the 27 stations provide connections to local transit services.

Station and signage inconsistencies can result in passenger confusion and create a barrier for potential new riders. Inaccurate or incomplete signage can complicate the boarding process and potentially cause a customer to miss their train or a needed connection. As a result, the LOSSAN Agency will undertake the creation of updated, integrated transportation signage that facilitates regional rail and transit connectivity and enhances the customer experience. This becomes especially important as we look forward to the anticipated influx of national and international visitors who will travel to Southern California to attend the 2028 Olympic Games.

## Transit Oriented Development

New and improved stations will also provide the LOSSAN Agency and its partners with opportunities to explore facilitating additional transit-oriented development (TOD). Promoting the development of commercial, residential, office, and entertainment projects centered around or located near stations adds to community vibrancy and attracts people to live, work, and play in adjacent TOD areas. This density coupled with convenient access encourages people to use Pacific Surfliner and the transit services our partners provide, resulting in increased ridership and associated revenue.

## OBJECTIVE #2: Providing Better System Performance

The Pacific Surfliner is Amtrak's most successful state-supported intercity passenger rail service. It has the highest Amtrak ridership of any state in the country. Excluding the pandemic years, since the early 2000s, ridership on the

Pacific Surfliner has increased significantly since the early 2000s and farebox recovery has continually exceeded 50 percent. Growth rates for these and other attributes are expected to continue growing significantly in the future, requiring the leveraging of new and existing funding sources to make investments in needed system performance improvements.

## Performance Standards and Metrics

As required by SB 1225, CalSTA has set uniform performance standards (UPS) for the three state-supported intercity passenger rail corridors, including Pacific Surfliner service, to control cost and improve efficiency: passenger miles, ridership, farebox recovery, cost per passenger mile, endpoint OTP, all-station OTP, and operator-responsible delays per 10,000 train miles (Table 3.2).

Many of these measures relate directly to on-time performance (OTP). Customers who can reliably count on departing and arriving as

**Table 3.2: Uniform Performance Standards**

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

\* One passenger traveling one mile = one passenger mile

*LOSSAN's goal is to use the Uniform Performance Standards as independent checks on how well it performs by making sure it meets and exceeds each standard on existing and new mobility services it provides.*



scheduled will continue to expand their use of the Pacific Surfliner. As such, OTP is an important measure of service quality and passenger satisfaction. For the Pacific Surfliner, endpoint OTP is defined as arrival at the endpoint station within 15 minutes of scheduled arrival times, with an ongoing goal of achieving this 90 percent of the time (Figure 3.2).

**Service Expansions will Drive Train Equipment and Crew Needs**

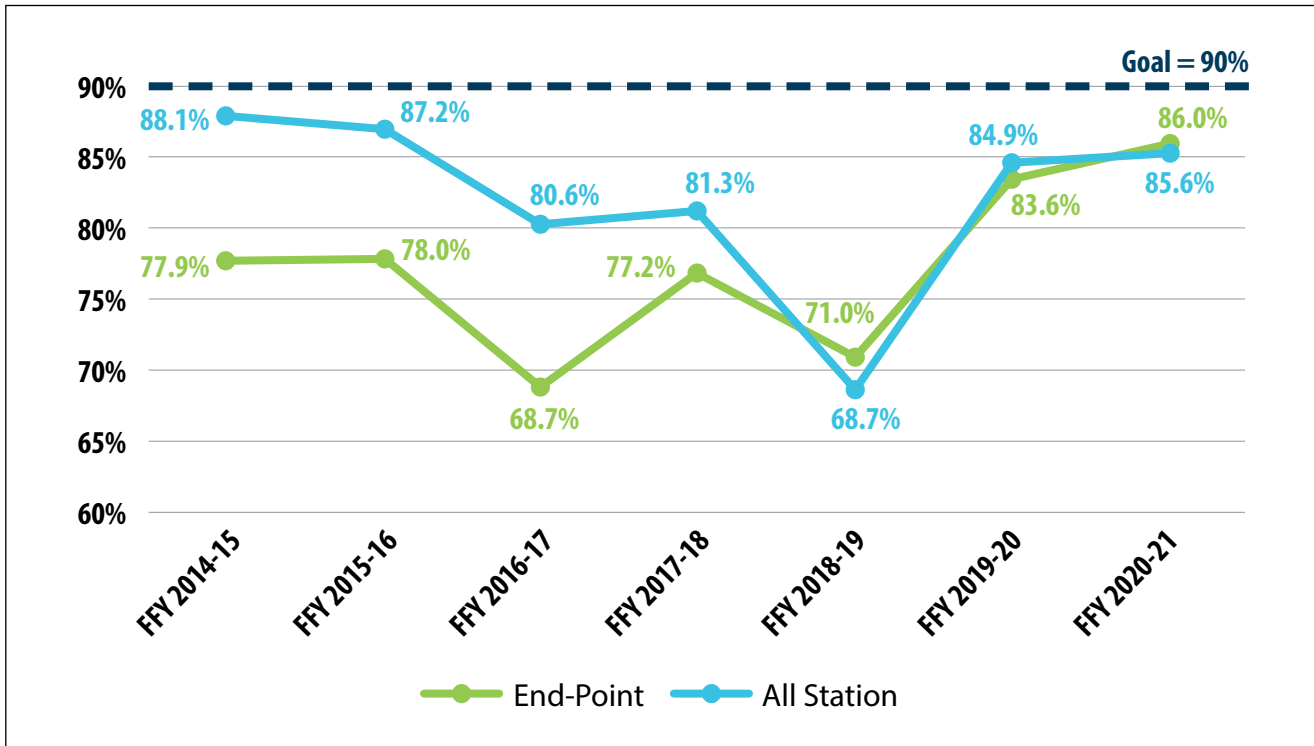
**Equipment Challenges and Ownership**

The LOSSAN Agency is planning on future train equipment acquisitions to meet planned growth as service and anticipated ridership increases. Based on planned service expansions and passenger projections, the LOSSAN

Agency will need to double the pre-pandemic Surfliner fleet to at least 20 train sets, each with six passenger cars, to meet the California State Rail Plan goal of 30-minute train service frequencies by 2040.

Most Pacific Surfliner locomotives and passenger cars historically have been owned by Amtrak (nearly 80 percent of bi-level passenger cars) and leased by the Caltrans [Division of Rail and Mass Transportation](#) (DRMT). Currently, the LOSSAN Agency is responsible for administration and supervision of the maintenance for the Pacific Surfliner fleet. Amtrak staff is responsible for all maintenance activities related to the Pacific Surfliner service as part of the annual operating contract with the LOSSAN Agency, and Caltrans DRMT directly funds lease fees and capital equipment charges for Amtrak-owned railcars and locomotives.

**Figure 3.2: Pacific Surfliner On-Time Performance**



For the Pacific Surfliner service, endpoint OTP is defined as arrival at the endpoint station within 15 minutes of scheduled arrival times.

Within this environment, the LOSSAN Agency will continue working collaboratively with Amtrak and Caltrans to identify the equipment and crews necessary for additional services, as well as develop plans for optimizing crew and equipment utilization. Going forward, the LOSSAN Agency and Caltrans DRMT are evaluating the possibility of purchasing the remaining 39 Surfliner bi-level cars and some additional Superliner bi-level cars currently owned by a private third party. Purchasing the equipment will allow for the cars being used on the Pacific Surfliner to better integrate into the statewide fleet management plan and allow for the sharing of resources more easily and efficiently with the other two state-supported corridors.

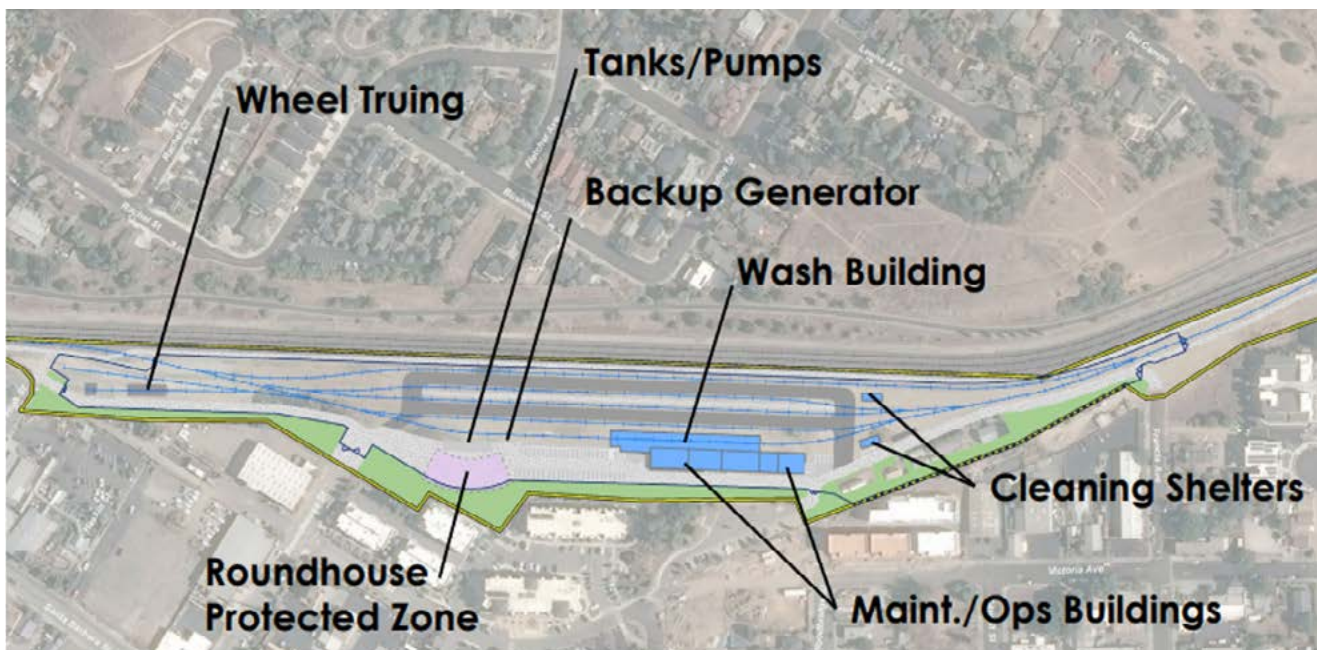
### Maintaining LOSSAN's Growing Fleet

The Pacific Surfliner service is currently supported by three layover facilities in San Diego, Goleta, and San Luis Obispo,

as well as a primary maintenance and layover facility near Downtown Los Angeles. Each layover facility is currently at or near capacity, prohibiting the expansion of the Pacific Surfliner service, and making it more difficult to cost-effectively restore service to pre-COVID levels.

Maximizing the safe, useful lifespan of the Pacific Surfliner's growing fleet will require both building new and expanding existing maintenance facilities at some of these locations, with planning currently under way. With new and expanded facilities in place, the Pacific Surfliner will be better positioned to improve ridership, increase revenue, and expand service. One such example is the proposed Central Coast Layover Facility located in San Luis Obispo (Figure 3.3). It will provide a maintenance shed and two layover tracks in its first phase (anticipated to be completed in 2026), with full service capabilities in later phases.

**FIGURE 3.3: Layover and Maintenance Facility Improvement Example**



*This project would shift the main line to align with the station and eliminate the current off-mainline maneuvering (currently the station is accessed by a wye and tangent track, creating a dead-end station). This improvement could save 10-15 minutes on the schedule and create a ripple effect that improves performance throughout the corridor. Planned or emerging projects benefit as well, as they can be designed around these improved schedule adjustments.*

### Staff Efficiency and Training Needs

Although the LOSSAN Agency’s Strategic Plan Update anticipates more frequent rail service in the future, this will not necessarily translate into an equal increase in rail crew size or numbers. As we and our partners implement pulsed (or regularly-repeating) schedules, operators are provided with repetitive, consistent, and scalable operations that lead to higher equipment and crew efficiencies. Additionally, greater integration between the LOSSAN Agency and other rail and transit operators removes duplication, forming a strong, cohesive set of passenger services that better compete with automobiles and increase ridership.

The result has the potential to achieve higher service quality with fewer trains, providing operators with an opportunity to expand

service throughout the day. The number of crews and their sizes become a more direct function of ridership and amenities. This may require customized training determined by that specific service expansion. These needs will be determined as part of the LOSSAN Agency’s regular analysis and forecasting associated with service or amenity changes and would result in detailed crewing and equipment planning. Implementation would be undertaken in coordination with our partners.

### Increasing Train Frequencies

Today, the LOSSAN corridor contains operations from multiple commuter, intercity, and freight railroads over multiple track configurations. The corridor is broken into three operating segments – San Luis Obispo (SLO) to Goleta, Goleta to Los Angeles Union Station (LAUS), and LAUS to San Diego (Table 3.3).

**Table 3.3: Train Frequencies**

Segment	San Luis Obispo (SLO) to Goleta	Goleta to Los Angeles Union Station (LAUS)	Los Angeles Union Station (LAUS) to San Diego
Miles	109	81	127
2021 Service Plan	4 daily trains round trips	5 daily trains round trips	10 daily trains round trips
Peak Frequency	3 hours	3 hours	1 hour
Track Ownership	Union Pacific Railroad	Goleta to Moorpark: UP Moorpark to Burbank: VCTC Burbank to LAUS: LACMTA	LAUS to Commerce: LACMTA Commerce to Fullerton: BNSF Fullerton to San Clemente: OCTA San Clemente to Sorrento Valley: NCTD Sorrento Valley to San Diego: SDMTS
Train Dispatching	Union Pacific Railroad	Goleta to Moorpark: UP Moorpark to LAUS: Metrolink	LAUS to San Clemente: Metrolink San Clemente to San Diego: NCTD
Shared Operations	Amtrak Coast Starlight Up Freight	Amtrak Coast Starlight UP Freight Metrolink Ventura County Line Mertrolink Antelope Valley Line	Amtrak Coast Starlight UP Freight BNSF Freight Metrolink 91 Line Metrolink Orange County Line Metrolink Inland Empire Line NCTD Coaster

The Strategic Plan Update envisions the LOSSAN Agency prioritizing future capital projects that focus on investments for better optimizing service performance. Projects lead by others will also play a significant role in reaching planned service frequencies. One key project identified is the Run-Through Tracks at LAUS. The plan also assumes greater equipment utilization and new maintenance and storage facilities at San Diego, Goleta, and San Luis Obispo, enabling a higher number of round trips on each operating segment.

As shown in Table 3.4 and 3.5, Pacific Surfliner service frequencies are anticipated to increase on all segments of the LOSSAN rail corridor in both the near and long term.

**Table 3.4: Near-Term Service Assumptions by Corridor**

Service		Baseline	Proposed	
Pacific Surfliner	<b>SAN-LAX</b> (San Diego – Los Angeles)	13 round trips	16 round trips	
	Goleta	<b>SAN-GTA</b> (San Diego – Goleta)	4 round trips	7 round trips
		<b>LAX-GTA</b> (Los Angeles – Goleta)	5 round trips	
	San Luis Obispo	<b>SAN-SLO</b> (San Diego – San Luis Obispo)	2 round trips	3 round trips
<b>LAX-SLO</b> (Los Angeles – San Luis Obispo)				
Coast connection at SLO		Bus - 3 round trips via SLO.		
Santa Clarita connection		As is.		
Coachella Valley connection		Bus - 3 round trips		
San Diego connection to Yuma		Bus - 2 round trips to Yuma		

**Table 3.5: Long-Term Service Assumptions by Corridor**

Service		Baseline	Proposed	
Pacific Surfliner	<b>SAN-LAX</b> (San Diego – Los Angeles)	13 round trips	18 round trips	
	Goleta	<b>SAN-GTA</b> (San Diego – Goleta)	4 round trips	7 round trips
		<b>LAX-GTA</b> (Los Angeles – Goleta)	5 round trips	8 round trips
	San Luis Obispo	<b>SAN-SLO</b> (San Diego – San Luis Obispo)	2 round trips	3 round trips
<b>LAX-SLO</b> (Los Angeles – San Luis Obispo)		4 round trips		
Coast connection at SLO		Rail/Bus - Train and bus via SLO. Alternating bus or train every 2 hours.		
Santa Clarita connection		Every other SAN-LAX train runs to Santa Clarita		
Coachella Valley connection		Rail - 5 round train trips per day to Coachella		
San Diego connection to Yuma		Bus - 2 round trips to Yuma		

*LOSSAN Rail Corridor Optimization Study, 2021*

The long-term goal is to align with the California State Rail Plan goal of 30-minute frequencies on Metrolink, with some lines potentially having 15-minute frequencies. NCTD COASTER would operate three trains per hour at 15-minute frequencies, with the remaining slot used by the Pacific Surfliner. This would mean maximum service could be delivered once regionally planned capital projects are complete.

## **Pulse Scheduling as an Optimization Strategy**

Pulse Scheduling (or clockface scheduling) is when a transit service is set on repeatable arrival and departure times. It is also a strategy whereby a connecting service timetable is set based on arrival times of a preceding service to reduce wait times between connections. This is a statewide vision first articulated in the 2018 California State Rail Plan.

The LOSSAN Agency began moving to a uniform, systemwide pulsed schedule in 2021 with partial implementation. The results have been positive with substantial benefits to passengers, operators, and agencies. Passengers benefit from a predictable timetable that ensures that connections can be made throughout the day with minimal transfer times. Operators benefit by providing service that can connect to more destinations via timed, predictable transfers that provide more frequent access. Agencies benefit by being able to more easily identify needed infrastructure improvements on the basis of whether they are necessary to reliably operate the current or desired timetable.

Under the Strategic Plan Update, the LOSSAN Agency will focus its planning efforts on expanding the pulse schedule implemented in 2021. The goal will be to achieve full-day, repetitive, and regular pulse schedules and fixing multi-hour service gaps in existing schedules. These efforts will focus on setting base patterns and peak overlays on Pacific Surfliner, Metrolink, and COASTER services. The goal will be to have regular, timed connections between the various services and to ensure trains operating on the same corridor and serving similar stations are distributed across the hour to provide an even spread of coverage. Over the longer term, the intent will be to improve run times and connections

through targeted investments in new fleet additions and infrastructure.

Pulse scheduling also benefits each transit agency by giving them an anchor point for planning their bus services. Doing so will enable them to leverage the benefits they deliver to their customers through better connections and greater resource productivity as it becomes clearer where infrastructure and fleet investments are most needed.

## **Better Managing Assets and Infrastructure**

The LOSSAN Agency engages with Amtrak, Caltrans DRMT, and the other California JPA's on ways of improving overall fleet performance and availability, as well as in updating the statewide fleet management plan. These and other efforts aim to continually improve the reliability, safety, and the cost effectiveness of our fleet. The goal is to ensure that operating assets remain in a state of good repair while accounting for timely vehicle procurement and retirement as demand and conditions dictate without negatively affecting operations.

Collaboration also facilitates identifying and adopting emerging technological solutions that can be implemented to address system needs in a more timely and cost-efficient manner. Examples of these technologies include:

*Predictive maintenance:* Predictive maintenance technologies use data analytics and machine learning algorithms to identify potential issues with rail assets before they occur, allowing for proactive repairs and maintenance. This can help to reduce downtime and improve the reliability of rail systems.

*Track monitoring:* Track monitoring technologies use sensors and other devices to monitor the

condition of rail tracks, allowing for real-time analysis of track health and potential issues. This can help to identify potential problems before they cause disruptions to rail service.

*Asset tracking and management:* Asset tracking and management technologies allow for real-time management of rail assets, such as rolling stock and infrastructure. This can help to improve visibility and control over rail assets, as well as enhance asset utilization and maintenance.

In partnership with Amtrak and our local stakeholders, the LOSSAN Agency identifies station- and maintenance-related asset management actions and improvements to undertake. These activities may expand in scope in the future with the LOSSAN Agency exploring potentially taking over the leases on selected stations and acquiring passenger rail cars. Owning the equipment will allow better integration into the statewide fleet management plan, as well as allow for the sharing of resources more easily and efficiently with the other two state-supported corridors.

### **Streamlining Operations Through Cooperation**

A key strategy for optimizing the LOSSAN Agency involves working with NCTD and UP now, and other partners in the future, to maintain or implement OTP incentive programs. These programs provide financial incentives (payments) for meeting Pacific Surfliner OTP goals.

The LOSSAN Agency will continue with our efforts to identify and address operator-responsible delays related to signal delay, slow orders, and maintenance of way activities, and work with operators on methods for mitigating these issues.

The LOSSAN Agency will work with the operators on dispatch policies related specifically to Positive Train Control (PTC), which consists of technologies used to manage train movements to avoid collisions, delays, and other issues. One initiative will be to establish a time threshold for allowing trains to proceed at reduced speed while experiencing PTC issues. In the future, the LOSSAN Agency will look for opportunities to monitor and act on system performance data in more comprehensive and sophisticated ways, improving our ability to:

- Anticipate potential issues;
- Increase the timeliness with which they are addressed;
- Implement schedule adjustments as problem areas are identified or to further optimize system performance; and
- Utilize as the Corridor Improvement Team, which includes all rail operators and host railroads, as a more effective change agent for system improvements.

The LOSSAN Agency also works collaboratively with member agencies to develop more localized transit and passenger rail service alternatives to improve corridor performance and to provide customers with the most appropriate transportation choice for their needs. These efforts will provide recommendations that, within the context of the Strategic Plan Update, could result in:

- Extending passenger services to the San Diego Convention Center and/or National City while also addressing anticipated freight rail demand growth.
- Accommodating anticipated freight rail growth without negatively affecting passenger service between Los Angeles and Fullerton.
- Integrating new, modified or expanded service options into the existing transit and rail network operations between Moorpark

and San Luis Obispo without negatively impacting overall performance.

- Supporting the establishment of a network of intercity rail and bus routes between Goleta and Salinas, as well as the implementation of a regional passenger rail service for locations within San Luis Obispo County that cannot be easily served by existing Pacific Surfliner service without affecting existing system performance.
- Providing advisory services in the development of regional rail service between Monterey and Santa Cruz and providing a Pacific Surfliner connection in San Jose to the Capitol Corridor or Caltrain in ways that leverage existing resources and performance.
- Implementing higher speed and enhanced safety alternatives along the San Diego Subdivision, including relocating the rail alignment off sensitive coastal bluffs in the City of Del Mar.

### OBJECTIVE #3: Improving Regional Connectivity

The LOSSAN Agency continually looks to improve the effectiveness of our long-term connectivity planning with rail partners. That includes working with partners to identify common goals and objectives for the Pacific Surfliner service and develop a long-term plan that aligns with those goals. The strategies used to achieve these goals will improve the reliability and efficiency of the service, as well as enhance the passenger experience. The LOSSAN Agency also engages in regular communication and collaboration with our partners to ensure that all are working towards the same goals. This collaboration also involves working to identify potential funding sources and secure the necessary resources through grants, support from local governments, and partnering with private sector organizations to leverage additional resources.

The longer term challenge for more effective connectivity revolves around overcoming organizational and operational data collection, analysis and action obstacles, including:

*Standardization of data:* In order to accurately compare and analyze data from different rail agencies, there must be a consistent and standardized approach to data collection and reporting. This includes ensuring that data is collected and reported using the same definitions and metrics, and that it is regularly updated and shared across agencies.

*Integration of data from different sources:* To provide a comprehensive view of regional or statewide connectivity, passenger rail agencies must be able to integrate data from a variety of sources, including ridership data, schedules, and infrastructure information. This requires robust systems and processes for collecting, storing, and analyzing data from multiple sources.

*Data privacy and security:* In order to share data across agencies, the LOSSAN Agency and partners must be able to ensure that data privacy and security protocols are in place to protect sensitive information. This includes implementing common or complementary measures such as encryption, access controls, and data governance policies to safeguard data from unauthorized access or misuse.

*Capacity and expertise:* the LOSSAN Agency and partners must have the capacity and expertise to collect, analyze, and interpret data in order to effectively coordinate their services. This includes investing in staff training and development, as well as acquiring the necessary tools and technology to support data analysis and decision-making, either collectively or on an agency-by-agency basis.

The LOSSAN Agency anticipates overcoming these barriers by maintaining a shared commitment to collaboration and data-driven decision-making with our partners.

The LOSSAN Agency's Strategic Plan Update continues efforts to regionally improve rail service connectivity through service optimization, modeling efforts, joint funding pursuits, and coordinated ticketing and dispatch policies. The LOSSAN Agency will continue to identify, prioritize, and deliver on infrastructure and other improvements that grow transportation services in and around the LOSSAN rail corridor while building upon the existing success of the Pacific Surfliner service.

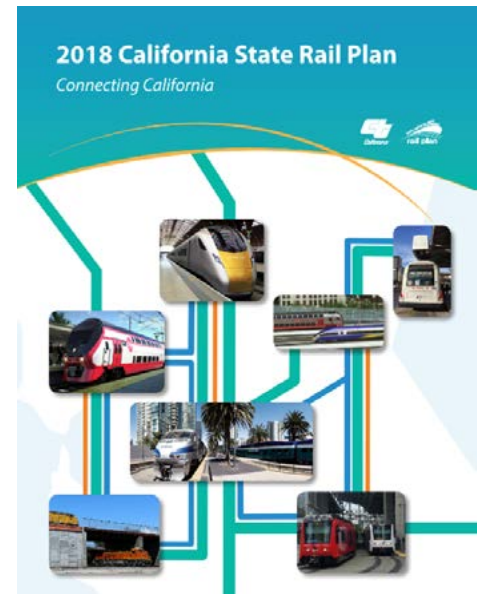
The LOSSAN Agency works in close coordination with CalSTA and Caltrans DRMT to create an integrated passenger rail network with coordinated schedules, which will provide additional travel options throughout the state and allow passengers to seamlessly transfer from service to service. The goal is to strengthen the LOSSAN Agency's role as a substantive contributor to the California Vision for an Integrated Statewide Rail Network, enabling people to:

- Travel seamlessly across urban, suburban, and rural areas of the state with more trains, more often.
- Save time with significantly faster trips.
- Enjoy the journey on modern, safe, clean, and comfortable trains.
- Transfer quickly and easily between high-speed, intercity, and regional trains; express buses; and transit at hub stations with coordinated arrivals and departures to significantly reduce wait times.
- Plan entire door-to-door trips and purchase a single ticket using a streamlined trip-planning portal

Regional connectivity and inter-agency cooperation will help the LOSSAN Agency identify and exploit the latent capacity of its system to provide more service with more efficient performance built on longer and more frequent trains, better connectivity, and greater ease of access. Done properly, the number of riders will grow as more trains run more often and more quickly to more places, and with a broader range of amenities and features.

### Connections To Other Train Networks

Extending service to bridge the gap between regional population centers will help connect localized transit networks and create a more unified and seamless transit system. Part of this effort involves working with member agencies to study and pursue expansion opportunities on emerging corridors that provide connectivity within Southern California and beyond.



*Like the LOSSAN Agency's foundational planning documents, the state rail plan establishes a long-term vision for an integrated, cohesive rail system that offers efficient mobility services, supports California's economy, and helps achieve critical climate goals.*



Two prime candidates for connection through service extensions are the eastern communities throughout Riverside County and the Coachella Valley, and coastal communities up to San Luis Obispo and north to the San Francisco Bay Area. These include:

- **The Coachella Valley Route**, which is a corridor between Los Angeles and the City of Coachella. This service would be similar to the Pacific Surfliner service, providing intercity rail service that would operate through a wide variety of settings from the heavily urbanized areas of Los Angeles and Orange County to the less-populated, but rapidly growing areas of eastern Riverside County.
- **The “Coast Daylight,”** or Coastal Corridor route, is a proposed extension of the current intercity and long-distance service on the LOSSAN rail corridor from Los Angeles to San Francisco.

The LOSSAN Agency will participate in efforts to create seamless connections between the Pacific Surfliner and future passenger rail services on the Coachella Valley and Coastal corridors.

### Improving Connectivity Through Bus Service

Connectivity for the LOSSAN Agency involves more than rail. Pacific Surfliner rail service is supplemented by Amtrak’s network of state-funded Thruway buses that connect passengers throughout the LOSSAN rail corridor and beyond (Figure 3.4).

Amtrak contracts with private bus operators for this service, which functions as an extension of the Pacific Surfliner. It offers coordinated connections, guaranteed seating, integrated fares and ticketing, and inclusion in Amtrak’s central information and reservation system. Thruway buses serve as an important complement to Pacific Surfliner service by connecting to cities off the train route and to fill service gaps, including those that may have the potential to become Pacific Surfliner extensions or new rail corridors in the future. The buses also extend the Pacific Surfliner’s ability to connect off-corridor passengers to Los Angeles Union Station and Amtrak long-distance trains.

**Figure 3.4: Pacific Surfliner Thruway Corridors**



The LOSSAN Agency will work cooperatively with Caltrans DRMT to ensure sufficient state funding is available to operate the Pacific Surfliner and complimentary Thruway bus services, as well as to improve rail service, ridership, revenue, and on-time performance. The LOSSAN Agency will look to support priority bus service expansions aligned with California’s Interregional Transportation Strategic Plan and other goals and policies in statewide guiding documents such as the California Transportation Plan 2050 (CTP 2050), California State Rail Plan (CSRP), and Climate Action Plan for Transportation Infrastructure (CAPTI).

**Table 3.6: Station Boarding Projections within the LOSSAN Corridor - Long-Term**

Station	2019	Long-Term (2032)				2019-2032 Proposed
	Observed	Baseline	Proposed	Change	% Change	% Change
SLO	36,350	47,000	64,250	17,250	37%	77%
GVB	11,150	14,350	22,450	8,100	56%	101%
GUA	7,300	9,350	11,700	2,350	25%	60%
LPS	5,300	6,750	8,900	2,150	32%	68%
GTA	62,250	79,300	109,450	30,150	38%	76%
SBA	157,350	200,000	263,100	63,100	32%	67%
CPN	18,600	23,650	33,050	9,400	40%	78%
VEC	47,050	60,450	84,500	24,050	40%	80%
OXN	45,900	58,700	72,500	13,800	24%	58%
CML	30,000	38,600	63,300	24,700	64%	111%
MPK	9,700	12,600	37,450	24,850	197%	286%
SIM	23,850	30,500	37,550	7,050	23%	57%
CWT	32,800	41,000	52,800	11,800	29%	61%
NRG	-	-	22,350			
VNC	35,350	43,800	54,400	10,600	24%	54%
BUR	32,800	40,800	50,750	9,950	24%	55%
BUD	-	-	15,750			
GDL	25,500	31,650	41,600	9,950	31%	63%
LAX	651,850	802,750	875,500	72,750	9%	34%
FUL	132,100	166,950	189,150	22,200	13%	43%
ANA	133,750	174,400	199,050	24,650	14%	49%
SNA	79,850	103,600	119,350	15,750	15%	49%
IRV	180,400	235,750	271,350	35,600	15%	50%
SNC	108,250	140,650	161,250	20,600	15%	49%
SNP	8,650	11,300	12,150	850	8%	40%
OSD	144,000	183,600	208,800	25,200	14%	45%
SOL	202,000	259,150	294,500	35,350	14%	46%
OLT	201,300	256,850	294,300	37,450	15%	46%
SAN	353,150	451,650	505,550	53,900	12%	43%
<b>Total</b>	<b>2,776,700</b>	<b>3,525,100</b>	<b>4,176,800</b>	<b>613,600</b>	<b>17%</b>	<b>50%</b>

Caltrans and Steers, April 2022.

\* Moorpark only has 1-3 trains per direction in the baseline, so experiences higher % increases than other stations.

## **Enhancing Connection Hubs**

The LOSSAN Strategic Plan Update recognizes that optimizing our operations involves leveraging the planning efforts, projected growth, service frequencies and corresponding infrastructure investments of its members and stakeholders. The goal is to achieve systemwide benefits that come from balancing and optimizing bus and rail service to better move Southern Californians in light of projected long-term growth of boardings at LOSSAN corridor stations (Table 3.6). This creates multiple opportunities for the LOSSAN Agency to collaboratively explore local community partnerships for strategically transforming these station nodes into more robust connection hubs for rail and local transit, optimizing the overall system's operations, and building long-term support for priority infrastructure improvements to help handle the growth.

## **Transit-Transfer Programs**

The LOSSAN Agency partners with local transit agencies to offer expanded options for transit connections throughout the corridor. The LOSSAN Agency also manages the Pacific Surfliner Transit Transfer Program, which was successfully launched in July 2016. The Transit Transfer Program provides free connections between the Pacific Surfliner and 11 local transit services. The LOSSAN Agency managed Amtrak Thruway bus lines are also included in this program.

In parallel with these efforts, the LOSSAN Agency will continue managing the Rail-2-Rail (R2R) programs with both Metrolink and NCTD. When first implemented, the R2R Program was intended to leverage available capacity on the Pacific Surfliner trains for the mutual benefit of Metrolink, NCTD, and Pacific Surfliner passengers. The R2R programs

provide for all Pacific Surfliner trains to accept valid Metrolink and NCTD tickets, and for all Metrolink and NCTD trains to accept valid Amtrak tickets within the limits of the tickets, subject to certain restrictions and blackout dates.

To continue the development of options for the long-term continuance of the R2R Program and also to ensure continued integration efforts on the LOSSAN rail corridor, Agency staff will continue working with Metrolink, Amtrak, and NCTD, as well as with Metro and MTS, on solutions that provide easier integration for passengers between services.

## **Coordination with Transit-Oriented Development**

The LOSSAN Agency seeks to expand and improve service to its customers. An increasingly important way it accomplishes this is by working to better coordinate with the expansion of transit-oriented development in our service area. To do this, we look to engage in earlier, ongoing communication with developers and local stakeholders to understand their priorities and vision for transit-oriented development.

As part of that process, the LOSSAN Agency will look for opportunities to collaborate on the development of comprehensive plans and strategies that align with our goals and objectives. Doing so requires us to refine the framework for evaluating and prioritizing projects and initiatives that will support transit-oriented development, such as OC Vibe, by appropriately increasing the services and frequency of service delivered to new and existing transit-oriented development. This also could involve:

- Refining criteria such as proximity to existing or planned destinations, impact

on ridership and revenue, and potential for economic development.

- Engaging with local, regional, and state stakeholders to advocate for policies and funding that support transit-oriented development.
- Working with elected officials and other decision-makers to secure support for projects and initiatives that will enhance connectivity and support the growth of transit-oriented development in the region.

### ***Integrated Ticketing***

Ticket integration is a key focus in the Strategic Plan Update for improving connectivity in the LOSSAN rail corridor and beyond. The LOSSAN Agency is committed to working with Caltrans DRMT, SJJPA, Metrolink, NCTD, Amtrak, and regional and local transit providers to improve transit and rail connections to the Pacific Surfliner.

To achieve this, the LOSSAN Agency will continue to move forward with integrated ticketing concepts in collaboration with NCTD, and Metrolink that will create a user friendly and standard interface for passengers to purchase tickets and transfer between services along

the LOSSAN rail corridor. Where possible, the LOSSAN Agency will explore fare integration opportunities and trip-planning resources that focus on first- and last-mile connections, as well as direct connections to popular destinations. The goal is to achieve integrated, end-to-end public transportation services that are accessible, convenient, and provide a truly viable alternative to single occupancy vehicle travel.

The challenge going forward is to make sure that these concepts take into account reasonable cost-sharing methodologies that equitably share revenue and costs between agencies. Additionally, consideration will have to be taken into account regarding having enough flexibility for the LOSSAN Agency to implement fare adjustments reflective of market, service, and amenity requirements. The LOSSAN Agency will, from time to time, need to appropriately explore opportunities to increase fare revenue in a variety of ways: raising fares, securing partnerships and underwriting from major destinations and attractions, enhancing loyalty programs, and expanding special event service.



## **Funding and Collaboration**

### ***Funding Approach***

The LOSSAN Strategic Plan Update recognizes that optimizing the LOSSAN Agency's operations involves significant collaboration with our members and other stakeholders. System needs are too great in the face of projected usage for any one entity to solve; more than \$5 billion in LOSSAN rail corridor improvements have been identified, while corridor partners and stakeholders have collectively identified only \$1 billion in funding.

In this environment, the Strategic Plan Update emphasizes smart collaboration to guide investments in location-specific projects that deliver substantive benefits throughout the entire corridor. This approach helps identify problematic areas (such as bottlenecks, aging infrastructure, and operational challenges), generate solutions, and prioritize funding.

Other issues may be minimized by ongoing discussions with corridor partners aimed at developing short- or mid-term workarounds to capacity issues and identifying how best to share the burdens of those constraints to balance corridor and stakeholder impacts.

### ***Host Railroad Coordination***

While each member agency or host railroad is responsible for the implementation of its respective capital improvement projects, the LOSSAN Agency coordinates with member agencies and station owners to pursue funding opportunities that benefit the larger rail corridor.

With its Strategic Plan Update as a guide, the LOSSAN Agency will continue taking a lead role in funding pursuits, with a focus on leveraging existing funds to advance capital projects that provide corridor-wide safety, service, regional connectivity, and environmental benefits among others. It will monitor OTP and work with Amtrak and host railroads to evaluate and pursue cost-effective opportunities to maintain the current OTP on the Pacific Surfliner service.

Where appropriate, the LOSSAN Agency will also continue with TIRCP-funded capitalized access and incentive agreements with host railroads to help maintain and improve the current infrastructure and level of OTP. Many current delays are due to State of Good Repair issues and can often be traced back to slow orders, signal system failures, and dispatching issues. These can cause trains to meet at non-planned locations, causing further delay. Financial incentives provide a framework in which the LOSSAN Agency can work with host railroads to identify and operationally address the root causes of delays.

## Safety Is LOSSAN's First Priority - and the Key To Optimization

Protecting the safety and security of passengers and communities that rely on the Pacific Surfliner is the LOSSAN Agency's top priority. It is first and foremost a moral obligation to those who trust the LOSSAN Agency to give them access to regional destinations, amenities, services, and jobs. It also is critically important to organizational success in terms of attracting and retaining riders, ensuring the optimal operation of passenger trains on the LOSSAN rail corridor, and being good stewards of local, state, and federal investments in infrastructure and equipment.

### *The LOSSAN Agency's Safety Philosophy*

The LOSSAN Agency aims to provide the nation's safest passenger railroad experience through a philosophy and approach (Figure 3.5) that leverages the Amtrak system safety plan to:

- Operate at the highest level of safety rather than at minimum regulatory standards.
- Aim for an operational record of zero accidents and serious injuries by identifying and addressing safety issues in a timely, effective, and data-driven manner.
- Empower all LOSSAN Agency and Amtrak personnel to stop an operation at any time if an unsafe condition exists and encourage safety self-reporting.

### *Putting Safety Into Action*

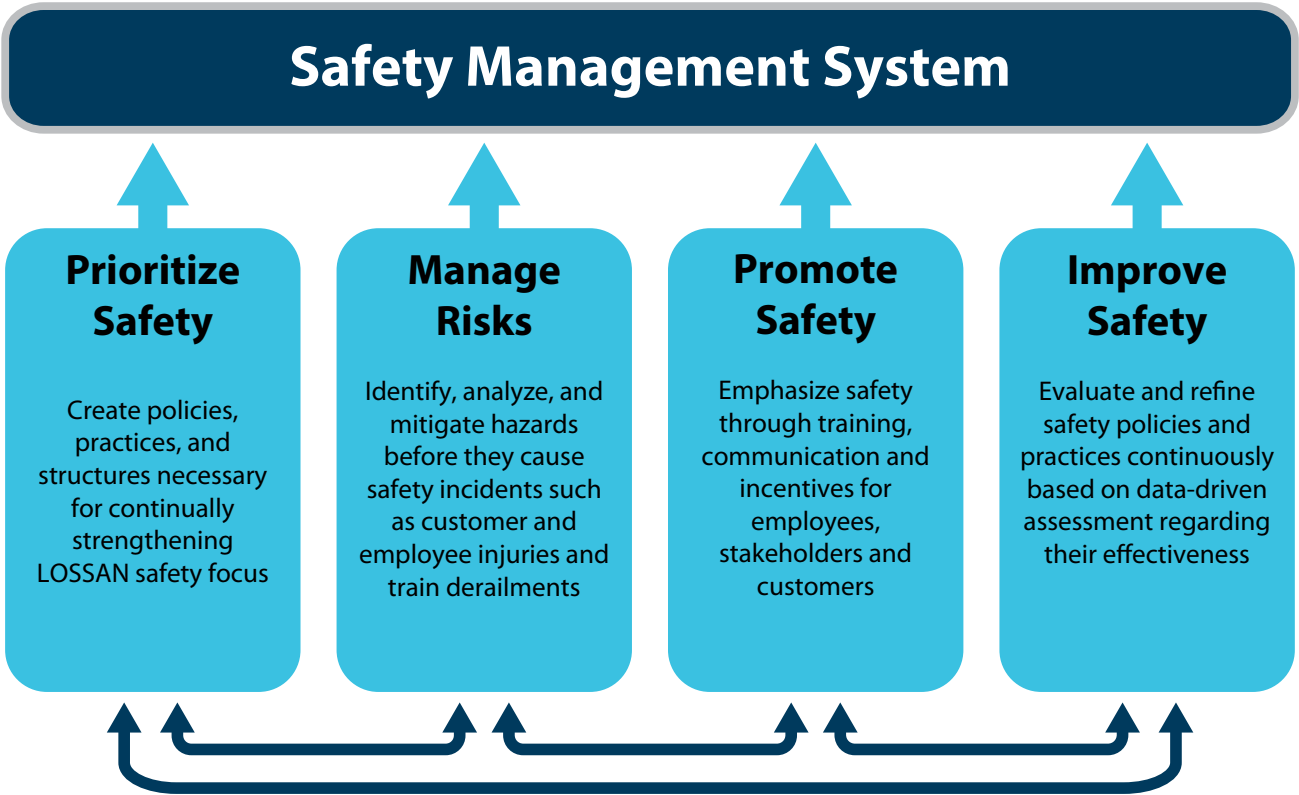
The LOSSAN Agency serves in an oversight and coordination role with regard to safety and security aboard trains, relying on the extensive programs and policies put in place by Amtrak. Other operational, track, and safety inspections are completed through a coordinated review

among the LOSSAN Agency and rail operators and owners, including Amtrak, Metrolink, NCTD, UPRR, BNSF, CPUC, and FRA. The LOSSAN Agency coordinates with them to fulfill state and federal compliance and reporting requirements.

The LOSSAN Agency's goal is to ensure that the Strategic Plan Update, coupled with other business and operational plans, put in place the appropriate operations, maintenance, and detailed system safety and security programs to protect Pacific Surfliner passengers and crew, as well as the public. These programs include:

- Identifying rail safety and security areas for improvement.
- Working with available data sources to identify "hot spots" for trespassing and vehicle strikes.
- Developing safety outreach programs that make the public safer and address stakeholder needs.
- Collaborating with Amtrak and stakeholders to ensure a common safety-first culture for all who work and travel on Pacific Surfliner trains and use its stations.
- Prioritizing rail capital project funding for projects that make safety and security improvements wherever possible.
- Coordinating training with host railroads, rail operators, and local first responders to ensure effective and expedited emergency response and accident investigation in the event of an incident.

**FIGURE 3.5: LOSSAN Safety Approach**



***Finding Opportunities to Expand Corridor Safety Improvements***

The LOSSAN Agency will use the Strategic Plan Update and other organizational planning initiatives to find opportunities for further strengthening safety outcomes internally and externally by:

- Collaborating on regularly scheduled safety meetings and initiatives with Amtrak and LOSSAN corridor stakeholders for their respective front-line employees;
- Working with right-of-way owners and rail operators to enhance safety and response to incidents along the right-of-way; and
- Engaging the public and with customers through social and traditional media and marketing to become rail safety partners.

Going forward, the LOSSAN Agency will continue to coordinate with local transit providers to address service disruptions, provide bus bridge service when emergency incidents occur, and transport each other’s passengers during service disruptions along the corridor.

The regional response to the COVID-19 pandemic further illustrates the power of collaboration among the LOSSAN rail corridor partners and stakeholders. In response to COVID-19, the LOSSAN Agency implemented enhanced health and safety measures on the Pacific Surfliner, including installing sanitizing stations onboard the trains, equipment modifications in the Café Car, and

changes to onboard food service procedures. The LOSSAN Agency has continued to work closely with the State, Amtrak, and member agencies to respond to public health concerns in ways that help the Pacific Surfliner remain a safe, reliable, and cost-effective transportation alternative.

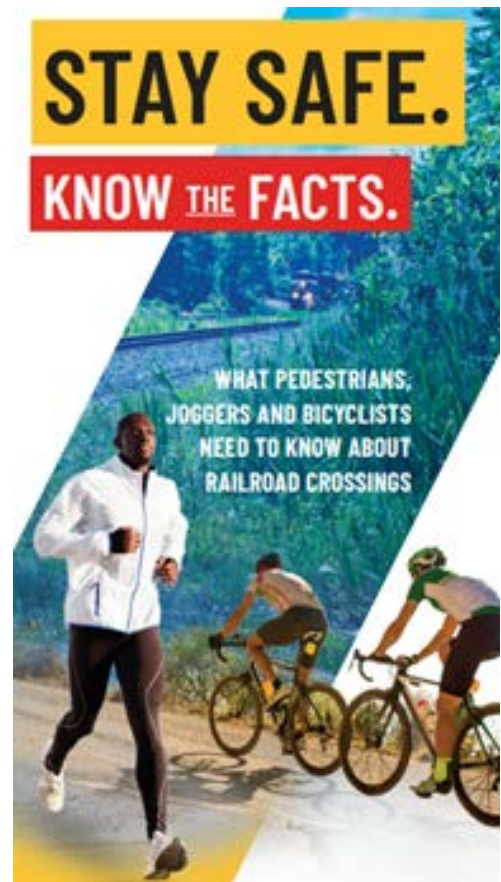
The LOSSAN Agency also will look for opportunities to improve station signage and intertrack fencing in collaboration with our partners and stakeholders. These can be important steps for improving system safety and operational efficiency. Better wayfinding, improved ADA access, fence installations between tracks and along right of way, and other treatments can significantly reduce the risk of pedestrians and others finding themselves in harm's way as trains leave or arrive at stations.



*LOSSAN's strategic efforts to keep the public informed of its responses to COVID-19 pandemic have been honored for excellence by the American Public Transportation Association.*

The impact of such efforts will be leveraged by working with our partners at California Operation Lifesaver to help us achieve the organizational goals outlined in the Strategic Plan Update, Annual Business Plan, and other LOSSAN Agency planning documents. California Operation Lifesaver helps the public make good decisions around railroad tracks in order to stay safe and avoid preventable tragedies through public outreach and education. The LOSSAN Agency is currently developing a corridorwide safety initiative in cooperation with California Operation Lifesaver to implement a multi-faceted campaign aimed at addressing trespasser strikes along the LOSSAN rail corridor. California has the highest number of railroad-trespassing and grade-crossing fatalities in the United States, with hundreds of people dying needlessly on or around California's railroad tracks annually.

Public education efforts like those of Operation Lifesaver also leverage the benefits of technological and operational improvements such as Positive Train Control (PTC). PTC is a predictive collision avoidance technology designed to stop a train in motion when its continued movement may result in an accident (Figure 3.6). PTC is fully operational on all Pacific Surfliner trains. The safety-enhancing technology prevents train-to-train collisions, speeding and over-speed derailments, incursions into track work zones, and the movement of a train through a switch left in the wrong



*Photo Credit: Operation Lifesaver*

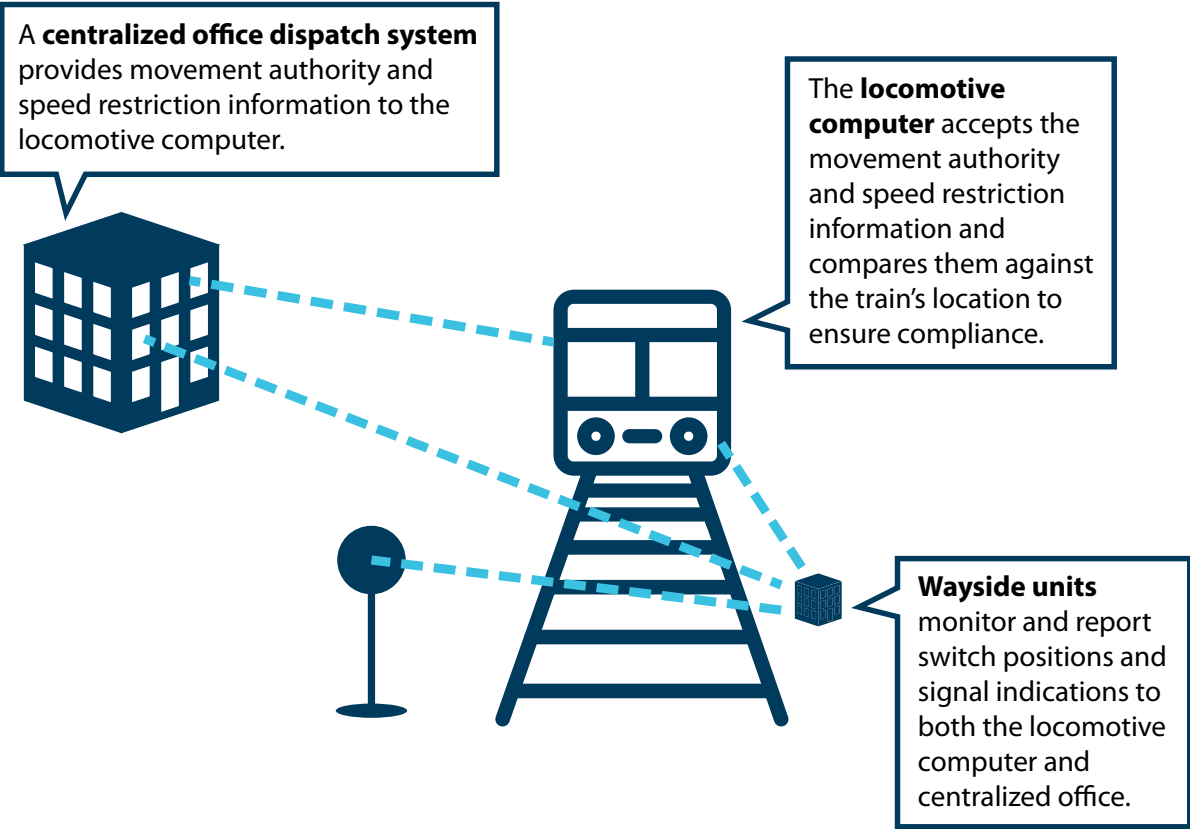


position. As a result, train crews, passengers, and railroad workers avoid injury or death; passenger and freight train operational efficiency is improved; and real-time train location information that can be used for safety and operational advantage.

**FIGURE 3.6: Positive Train Control**

**HOW PTC IMPROVES SAFETY**

- As a train approaches a speed restriction, PTC **issues a warning**. If the train operator fails to adequately reduce the speed of the locomotive, the system **enforces a reduction in speed**.
- PTC also enforces braking or speed reductions when a train is approaching a segment of track occupied by **another train, a work zone, or a misaligned switch**.



## Areas for Improvement

The LOSSAN Agency continually seeks to optimize operations as a foundational strategy for improving customer safety and travel experiences. It prioritizes projects that are safety related or that have safety elements, ranging from minor signage improvements to a corridor-wide video surveillance system. Annual discretionary state-funding is used for improvements to the Pacific Surfliner service, such as station improvements and minor security enhancements, as well as more significant periodic station and platform improvements. Larger capital projects being undertaken continue to emphasize safety elements as part of their scope. These and other projects are listed in the LOSSAN Agency's Capital Improvement Plan.

Guided by the Strategic Plan Update and other planning documents, the LOSSAN Agency will continue to explore ways to reduce safety incidents along the railroad ROW that can result in injuries, fatalities, and significant property damage. This will involve prioritizing locations and projects that include track and signal upgrades, fencing along the ROW to prevent unauthorized access, gate and warning systems, and grade separations that eliminate at-grade crossings.

The LOSSAN Agency will also look for opportunities to support efforts by its member agencies to independently seek funding for larger-scale capital improvements (such as grade separations, grade crossing improvements, and bridge replacements) that will leverage existing LOSSAN Agency investments and contribute to the safety of the Pacific Surfliner service for its passengers.

## MOVING FORWARD WITH OPTIMIZING OPERATIONS

Achieving the goal of optimizing operations will require specific, concrete steps to meet the optimization objectives the Strategic Plan Update lays out and doing so as quickly as time, funding, and ridership demand. Among these steps are:



### Objective: Service Expansion

- Expand the frequency of existing service, including special event trains, along with the necessary rolling stock and crew, by maximizing system efficiency via targeted investments.
- Increase ridership on existing frequencies through faster, integrated train schedules; improved reliability; and better transit connectivity (including investment in layover facilities).
- Increase the number of rail stations based on new services, impacts of transit coordination with other rail and transit providers, and the addition of new destinations that may require either permanent or event-specific stations.
- Enhance transit connections from Pacific Surfliner stations to local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport.
- Improve on-time performance and reliability to better serve and retain existing customers, make it easier to attract new customers, and create sustainable fare-box revenues.

- Improve on-time performance and reliability as a tool for customer recruitment and retention.
- Identify equipment and crews necessary to implement additional service aligned with funding levels and ridership growth.
- Look to maintain and expand the state subsidy from the Public Transportation Account and/or other sources to make needed rail corridor investments; add new equipment, amenities, and destinations; and provide incentives to sustain and improve existing and new access and shared-use agreements with host railroads on which the Pacific Surfliner service operates.
- Develop more localized transit and passenger rail service alternatives to improve corridor service and to provide customers with the most appropriate mobility choice for their needs.
- Extend passenger services to the San Diego Convention Center and/or National City while also addressing anticipated freight rail demand growth.
- Accommodate anticipated freight rail growth without negatively affecting passenger service between Los Angeles and Fullerton.
- Integrate new, modified or expanded service options into the existing transit and rail network operations between Moorpark and San Luis Obispo.
- Continue efforts to develop easier ticketing, fare, and trip planning integration between services.



### Objective: Performance Enhancements

- Address existing and emerging safety issues affecting system operations in a timely manner.
- Seek out solutions that will enhance coastal resiliency to ensure continued safe operation of the LOSSAN rail corridor through high-risk coastal zones.
- Explore new systems, processes, and metrics to better mitigate risk using data-driven solutions.
- Empower Agency safety self-reporting and mitigation.
- Work with host railroads to identify and address “hot spots” for trespassing and vehicle strikes.
- Develop safety outreach programs that make the public safer and address stakeholder needs.
- Prioritize rail capital project funding for projects that deliver safety and security improvements.
- Coordinate training with host railroads, rail operators, and local first responders to ensure effective and expedited emergency response and accident investigation of incidents.
- Pursue state and federal grant funding for additional safety and security improvements.
- Put into action new agreements with local transit providers to address service disruptions, provide bus bridge service when emergency incidents occur, and transport each other’s passengers during service disruptions along the corridor.
- Improve station signage, wayfinding, ADA access, and intertrack fencing to improve system safety and operational efficiency.
- Explore ways to reduce safety incidents along the railroad ROW that can result in injuries, fatalities, and significant property damage, prioritizing locations and projects that include track and signal upgrades, fencing along the ROW to prevent unauthorized access, gate and warning systems, and grade separations that eliminate at-grade crossings.
- Support efforts by member agencies to seek funding for larger-scale capital improvements (such as grade separations, grade crossing improvements, and bridge replacements) that leverage LOSSAN Agency investments and contribute to the safety of Pacific Surfliner service.
- Evaluate the possibility of purchasing rail cars that would enable better integration into the statewide fleet management plan and allow for the sharing of resources more easily and efficiently with the other two state-supported corridors.

- Maximize the safe, useful lifespan of new and existing rolling stock servicing the LOSSAN rail corridor through new and expanded existing maintenance facilities.
- Maintain or implement OTP incentive programs for addressing operator-responsible delays.
- Promote the adoption of existing and emerging technological solutions that can be implemented corridor-wide or at specific locations to address system needs more in a more timely and cost-efficient manner compared to using more traditional methods.



### Objective: Improving Connectivity

- Increase regional train service to more destinations.
- Expand connectivity with other rail and bus services to increase ridership and support state and national visions for a greater interconnected rail system.
- Achieve bi-hourly service where possible. Fill in gaps with integrated express bus service.
- Provide enhanced local transit connections at key stations along the corridor.
- Maximize fare coordination.
- Integrate fully the ticketing options, including free transfer options, offered by corridor service providers in a way that fully recognizes partner cost and system needs.
- Strengthen partnership with LAX Flyaway bus service connections available at LA Union Station.
- Pursue expansion to eastern communities throughout Riverside County and Coachella Valley, and coastal communities to San Luis Obispo and north to the San Francisco Bay Area.
- Build new and improved stations that facilitate greater transit-oriented development (TOD).
- Support the establishment of a network of intercity rail and bus routes between Goleta and Salinas as well as the implementation of a regional passenger rail service for locations within San Luis Obispo County that cannot be easily served by existing Pacific Surfliner service.
- Offer advisory services in developing regional rail service between Monterey and Santa Cruz.
- Provide a Pacific Surfliner connection in San Jose to the Capitol Corridor or Caltrain.
- Implement higher speed and enhanced safety alternatives along the San Diego Subdivision, including relocating the rail alignment off sensitive coastal bluffs in the City of Del Mar.
- Help establish daily intercity rail service between Los Angeles and the Coachella Valley.

The Strategic Plan Update provides a powerful framework for clearly focusing both our internal efforts and external collaborations on delivering better service, efficiency, and connectivity in ways that maximizes benefits for the customers, stakeholders, and communities served by the LOSSAN Agency. It makes clearer the operational vision we are pursuing in partnership with partners. And by making clear how and where investments will be prioritized, it creates an environment for effectively developing implementation schedules and performance measures associated with advancing specific strategies and initiatives.



## **4. PRIORITIZE BUSINESS SUSTAINABILITY**

This FINANCIAL component of the Strategic Plan Update provides a strategic framework for linking federal and state intercity passenger rail discretionary funding opportunities with important LOSSAN Agency capital improvement projects. By better aligning potential projects with the most appropriate grant funding opportunities (see Appendix A), the LOSSAN Agency can increase the likelihood of winning state and federal grant funding to help accelerate the delivery of improved customer services and capabilities.

The LOSSAN Agency’s primary mission is to improve passenger rail service between San Diego, Los Angeles, and San Luis Obispo by increasing ridership, revenue, capacity, reliability, integration, and safety on the corridor.

In order to accomplish this successfully in the long term, the LOSSAN Agency must maintain an organization that is able to build its business sustainability and resiliency (Table 4.1). These concepts can be defined as the ability of an organization to anticipate, prepare for, and respond to a foreseeable range of potential challenges and opportunities in ways that make it likely it will remain profitable and productive despite expected or unexpected changes in its operational environment.

**Table 4.1: Business Sustainability Goal SMART Tasks**

<b>Goal: Prioritize Business Sustainability</b>							
<b>Objectives</b>							
<b>Being Fiscally Responsible</b>		<b>Being Environmentally Conscious</b>		<b>Supporting Equity and Inclusion</b>		<b>Being Leaders in Business Management</b>	
<b>S</b>	Generate sufficient revenue to meet ongoing obligations, fund long-term needs, and maintain sufficient reserves to address atypical or one-off events (e.g. natural disaster/pandemic)	<b>S</b>	Reduce environmental impact	<b>S</b>	Remove unconscious barriers that preclude customers based on their race, ethnicity, gender/gender identity, sexual orientation/identity or ability/disability	<b>S</b>	Be a financial steward of public funds, providing the highest level of service, while conserving available resources
<b>M</b>	Costs measured against annual revenue and state subsidy	<b>M</b>	Minimize impact on California air, water and soil from reduced emissions	<b>M</b>	Identify and prioritize eliminating barriers based on ridership services	<b>M</b>	Increase the number of strategic partnerships with other agencies and businesses.
<b>A</b>	Develop likely revenue-requirement scenarios and measure current and projected revenue against them to identify future fiscal needs	<b>A</b>	Set organizational “stretch” goals for environmental stewardship and measurements of success	<b>A</b>	Convene a process driven by user- and non-user communities to identify barriers and solutions.	<b>A</b>	Develop phased approach for implementing business management best practices.
<b>R</b>	Incorporate process into annual workplan	<b>R</b>	Incorporate environmental stewardship requirements in all LOSSAN planning documents including equipment procurement	<b>R</b>	Assign functional-specific LOSSAN champions to develop action plans for resolving issues.	<b>R</b>	Incorporate annual review of business management processes into Strategic Plan
<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

## Being Fiscally Responsible

To ensure the LOSSAN Agency has adequate revenue to meet current and future operational needs, it needs to create and act on revenue requirements and generated financial scenarios. This involves identifying existing revenue streams and gauging their reliability, as well as considering broader revenue requirements and scenarios in relation to current and future operational needs. Additionally, it requires more sophisticated approaches for assessing potential growth opportunities, such as expanding into new markets or launching new products or services. These must also factor in the costs of seasonal fluctuations, economic fluctuations, and changes in consumer demand beyond simple historical comparisons.

The COVID-19 pandemic highlighted both the necessity and challenge of building the LOSSAN Agency's business resilience. Years of continual growth across a broad spectrum of performance measures, including daily service ridership, fare box recovery, and others, stopped and fell rapidly as the pandemic gathered strength. COVID-19 illness and revenue cuts both contributed to the reduced availability of staff. Revenue impacts extended beyond just ridership, and affected advertising, food and beverage sales, and other supplementary revenue.



A compounding issue is that service reductions do not comparably reduce costs. This is due to the need to maintain essential lifeline transportation service and add enhanced health and safety measures. Some costs, such as station staffing, remained constant despite service reductions. This produced significant increases in costs per mile as lower ticket revenue does not offset the cost of operating the service.

Taken together, these experiences provide a road map for how the LOSSAN Agency can "future-proof" the organization against unexpected broad operational disruptions:

1. *Establish adequate cash reserves* - LOSSAN Agency staff and the Board will collaborate on establishing a fund balance and reserve policy that sets minimum levels for designated funds (and their sources) to ensure stable service delivery, meet future needs, and protect against financial instability.
2. *Maximize available state funding* - the LOSSAN Agency will continue and expand its advocacy and programmatic analysis designed to maximize its share of long-term, sustainable funding sources to support passenger rail operations and capital projects along the LOSSAN rail corridor.

An emphasis will be on promoting state adoption of mechanisms that facilitate flexible and adaptive compliance with state requirements in the face of major operational disruptions.

3. *Develop service cut “triggers” and scenarios* - the LOSSAN Agency and its partners will explore potential disruption scenarios, identify potential service conditions and ridership declines, and develop general strategies for determining the nature, timing and depth of service changes that make sense given operating conditions. The goal will be to ensure the health and safety of passengers, crew, staff, and the community; support organizational viability; and restore service as quickly, safely, and reliably as possible.
4. *Collaborate with state and JPA partners to create comprehensive system responses* - the LOSSAN Agency will seek collaborative problem-solving approaches with its state and JPA partners that involve creating mutual aid agreements to address common issues during emergencies such as COVID-19. In such cases, increased marketing may be required to build trust and assurance in our short- and long-term organizational response. This may mean that cooperative advertising and marketing efforts will be mounted by multiple agencies involved in taking passengers to shared locations.
5. *Maintain a long-term focus*. Extreme events such as COVID-19 are damaging, as they may result in delaying or abandoning longer-term planning efforts. It may be necessary to ensure that longer-range planning initiatives include options for alternative timelines or actions to accommodate unspecified disruptions.

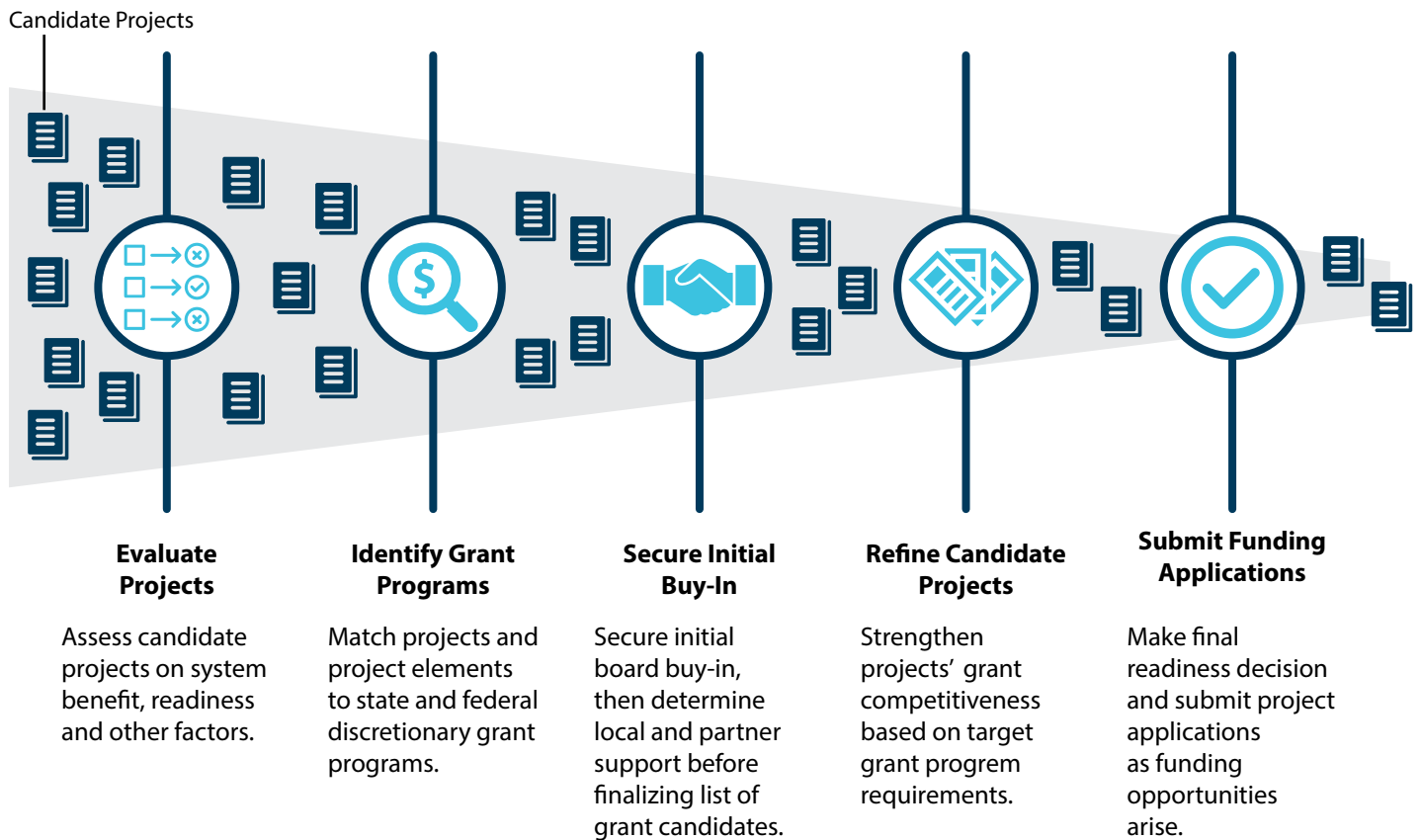
### ***Prioritizing Grant Planning and Funding***

The Bipartisan Infrastructure Law significantly expanded federal rail funding sources and amounts. It created an extraordinarily unprecedented opportunity for expanding intercity passenger rail throughout the U.S., to the potential future benefit of the LOSSAN Agency and our customers and constituencies. The federal government is prioritizing expanding intercity passenger rail across the country. This includes establishing new services, increasing investments in safety and the state of good repair for existing systems, and expanding intercity passenger rail and related multimodal improvements.

The LOSSAN Agency’s challenge is that the vast majority of its funding for intercity passenger rail is discretionary (as is state funding). This means that we must compete with project sponsors across the state and country to secure these revenues. The success in this area depends upon understanding these programs and their requirements to ensure candidate project applications are competitive. It will also require better aligning our Capital Improvement Plan with funding opportunities that may be several years out (Figure 4.1).

One key to enhancing the LOSSAN Agency’s business sustainability will involve leveraging local and state funds to pursue new and ongoing federal resources as exemplified by the Bipartisan Infrastructure Law (BIL), which reauthorizes transportation programs and makes significant investments in infrastructure. Specifically, it will be important to evaluate various BIL programs and determine which new and existing programs may be the most beneficial as potential avenues for delivering rail improvements. Doing so will help provide a strategic framework for linking federal and state intercity passenger rail discretionary funding opportunities with important LOSSAN Agency capital improvement projects.



**Figure 4.1: Grant Funding**

*Pursuing federal discretionary grant funding requires a flexible process for identifying potential projects, securing LOSSAN board support and investments in sharpening projects' competitiveness, and building coalitions of stakeholders to advocate for projects in the formal application process.*

This means developing more robust cost-benefit analyses of individual projects during earlier stages of project planning and development. This will help identify the most competitive projects for discretionary funding.

Such an approach will require more sophisticated and nuanced analysis of each potential project's forecast quantitative and monetized benefits such as safety, travel time, greenhouse gas reductions, greater access for disadvantaged communities, quality of life improvements, and other considerations. These steps, along with others taken in combination, will help the LOSSAN Agency develop a flexible, actionable plan and timeline for ensuring it has adequate revenue to meet current and future capital improvement needs.

## Being Environmentally Conscious

The LOSSAN Agency aspires to be environmentally conscious (Table 4.2) and to be known for effective, consistent efforts to:

- Operate in a sustainable manner, encourage environmental resiliency, and use renewable resources where possible;
- Seek out environmentally responsible suppliers and source materials locally to reduce its carbon footprint; and
- Regularly analyze our services and operations to identify new policies or actions to eliminate or minimize negative environmental impacts.

Being environmentally conscious encompasses a broad range of current and future activities such as:

1. Providing quality service to locations and at frequencies that increase the number of people who move to rail from cars for their transportation needs, significantly reducing regional CO2 emissions.
2. Expanding the Amtrak Thruway bus service reliance on more environmentally friendly fuels such as electric battery, hydrogen, or other technologies.
3. Moving beyond using Tier 4 locomotives (the lowest-emission diesel locomotives currently in operation) to zero-emission units relying on hydrogen, battery electric, or other emerging technologies.
4. Putting in place environmentally supportive administrative actions such as reducing train idling time or using on-train café car products that minimize non-biodegradable packaging waste.

It also involves a longer-term focus on reducing or eliminating environmental impacts from our operations by looking more holistically (Figure 4.2), including:

**Table 4.2: Business Sustainability Goal SMART Tasks**

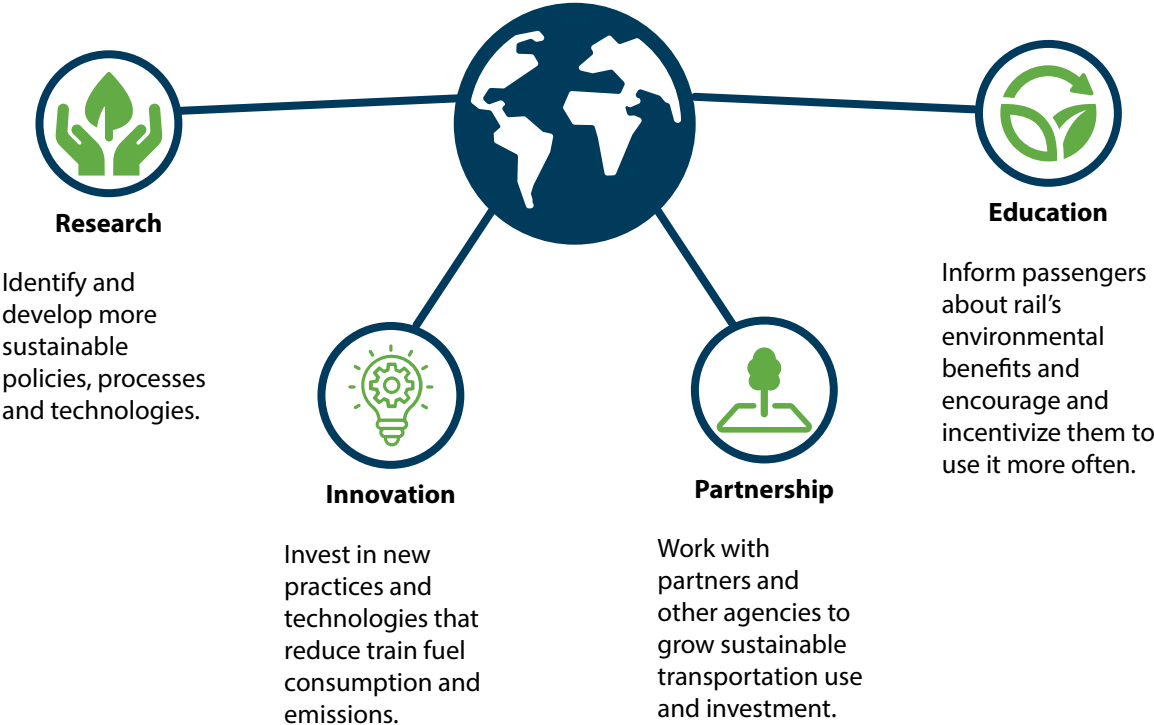
Goal: Prioritize Business Sustainability	
Objective: Being Environmentally Conscious	
<b>S</b>	Reduce environmental impact
<b>M</b>	Minimize impact on California air, water and soil from reduced emissions
<b>A</b>	Set organizational “stretch” goals for environmental stewardship and measurements of success
<b>R</b>	Incorporate environmental stewardship requirements in all LOSSAN planning documents including equipment procurement
<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable  
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- Institutionalizing regular and wide-ranging environmental audits to identify opportunities for reducing environmental impact while improving the quality of the goods and services it offers.
- Aligning the audit process and procurement system to better identify vendors and others who can provide more environmentally friendly and sustainable product design, production methods, packaging materials, and operational processes. (This could be done, for example, by advantaging firms that can deliver environmental benefits when they respond to RFPs and RFQs.)
- Seeking opportunities to partner with other organizations in order to share resources and drive innovation, including sharing development costs.

Identifying high-value opportunities for future environmental improvements is an ongoing process. By taking advantage of these opportunities, the LOSSAN Agency can help reduce greenhouse gas emissions and other forms of pollution, while also providing passengers with more sustainable transportation options.

**Figure 4.2: Environmentally Conscious Organizational Actions**



*An environmentally conscious approach affects all aspects of an organization including but not limited to facilities (locations, materials, construction methods); rolling stock (fuel source, assembly and maintenance, emissions control); and onboard services (paper goods, packaging, recycling, onboard materials for seats).*

### Coastal Resiliency

The question of whether coastal erosion is an issue for California has been answered time and again over the last several years. The impacts that are being brought on by climate change and sea level rise cannot be ignored. The LOSSAN corridor has numerous erosion hot spots along its length, with some already causing significant operational impacts due to landslides.

This can be exemplified by what has been experienced in the City of San Clemente over since September 2021. Climate change coastal erosion and landslides have bifurcated the busiest section of the LOSSAN Corridor for more than 18 of the last 20 months. The LOSSAN Agency will continue to prioritize



*Visible coastal erosion adjacent to the tracks at the Honda Bluffs in Santa Barbara County.*

combating the effects of climate change and coast erosion through a variety of methods. Resuming the Coast Resiliency working group,

offering input as appropriate to the LOSSAN Corridor Resiliency Senate Subcommittee, and pursuing funding for projects that support the mitigation of the environmental impacts associated with sea level rise.

## Supporting Equity And Inclusion

The LOSSAN Agency supports diversity, equity and inclusion in its dealings with customers, staff, contractors, and communities (Table 4.3). This is accomplished by employing three broad strategies for ensuring equity and fairness in process, opportunity, and distribution of resources:

- LOSSAN Agency staff, leadership, and Board are dedicated to creating structures that advance equity. They regularly review hiring, contracting, and other internal policies and processes to minimize or eliminate any risks of unconscious bias. As proof of this focus, the LOSSAN Agency and our managing agency OCTA have a workforce that reflects the demographic makeup of the Southern California region we serve.
- Engaging more deeply with the communities the LOSSAN Agency serves is a fundamental part of the organization's approach to any major project or initiative. The LOSSAN Agency works hard to ensure that we gather meaningful, actionable information about how our decisions impact our customers and communities, along with their ability to access to social, economic, and quality of life opportunities. Additionally, the LOSSAN Agency endeavors to expand inclusivity by making sure our communications are provided in multiple languages and convenient-to-use forums and formats, from websites to fliers to customer support.

**Table 4.3: Business Sustainability Goal SMART Tasks**

Goal: Prioritize Business Sustainability	
Objective: Supporting Equity and Inclusion	
<b>S</b>	Remove unconscious barriers that preclude customers based on their race, ethnicity, gender/ gender identity, sexual orientation/identity or ability/disability
<b>M</b>	Identify and prioritize eliminating barriers based on ridership services
<b>A</b>	Convene a process driven by user- and non-user communities to identify barriers and solutions.
<b>R</b>	Assign functional-specific LOSSAN champions to develop action plans for resolving issues.
<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable  
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- The LOSSAN Agency is making long-term investments to support a customer-driven vision of an equitable transportation system. It seeks to remediate past inequities and create fairer connections between today's transportation network needs and tomorrow's opportunities. The goal is to use meaningful public participation by those most affected by these inequities. That input will be used to produce measurable benefits to our customers, communities. To do this, the LOSSAN Agency employs public opinion surveys, electronic outreach, and other engagement mechanisms. The LOSSAN Agency also relies on our partners and their independent plans, studies, and engagement efforts - such as the Orange County Transit Vision - to supplement insights into the needs of communities along the LOSSAN rail corridor.

Together, these strategies lead to reliable, accessible, and equitable transportation choices for those the LOSSAN Agency serves by expanding the network of creative, financial, and political resources that can be called on to identify and respond to key customer and operational challenges, such as:

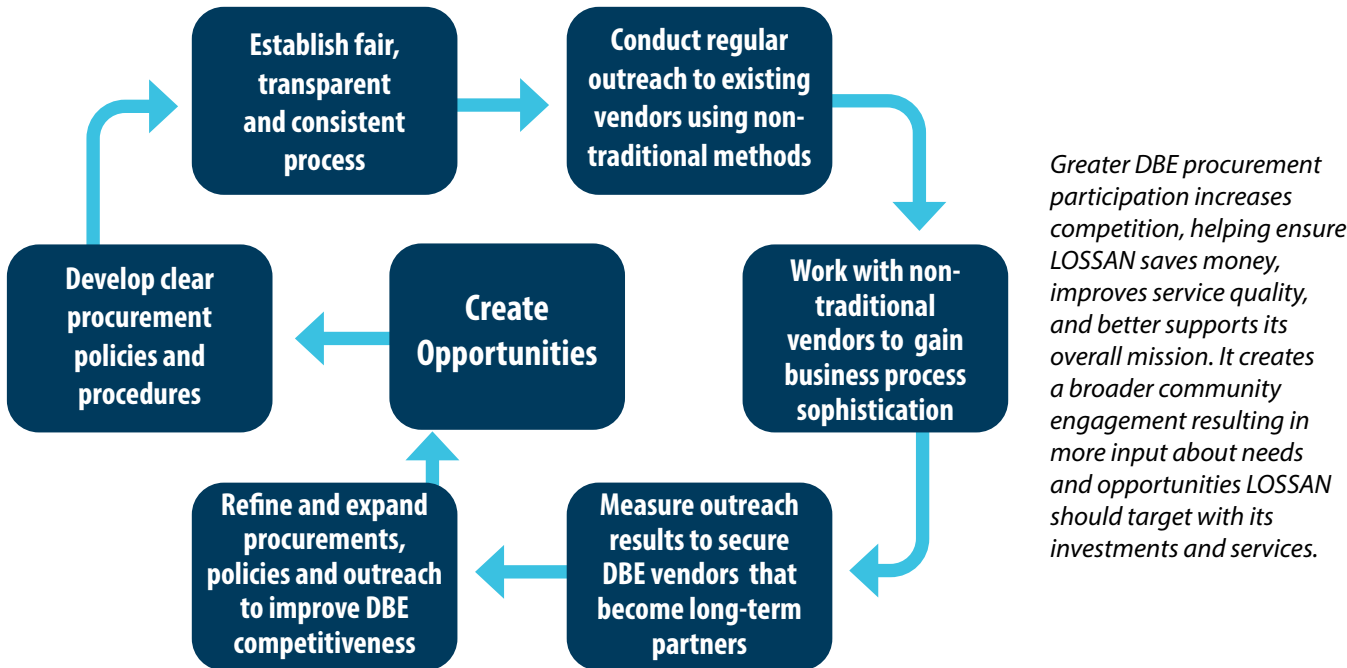
- Responding efficiently to service demand peaks for all customer groups;
- Increasing ridership in ways and in locations that maximize efficiency while better meeting the transportation needs of traditionally underserved communities;
- Communicating with and marketing to all customer groups more effectively by better understanding where and when they get transportation information; and
- Coordinating overall network services so that an “any place, any time” transportation network is a reality for all in the service region.

The LOSSAN Agency will continue expanding engagement and interactions with the many diverse communities we serve. This includes fostering relationships with numerous civic, social, and business communities to better serve an increasingly diverse customer base. This will aid us in acquiring a more nuanced understanding of what diversity, equity, and inclusion means to those we serve.

### Equity Also Involves Developing a More Diverse Business Environment

One key point of entry to improved organizational diversity, equity and inclusion is created by increasing business opportunities for minority-, women-, LGBTQ+-, and veteran-owned businesses, including small and DBE firms and firms owned by people with disabilities (Figure 4.3).

**Figure 4.3: Effective DBE Procurement and Contracting**



By encouraging greater participation as vendors, the LOSSAN Agency creates a set of stakeholders with unique perspectives on potential barriers that might otherwise go unseen or unacted upon by the LOSSAN Agency and our partners.

To ensure we are a leading contributor to California’s quality of life and social and economic vitality, the LOSSAN Agency will identify and eliminate barriers to service access, employment, and contracting by regularly:

- Measuring the numbers and demographics of job applicants and customers to identify shortfalls in expected participation and developing solutions to increase underrepresented populations.
- Examining internal policies and processes for potential biases or discriminatory practices, comparing them with industry best practices, and involving independent third-party experts when necessary to identify organizational unconscious bias.
- Exploring opportunities to form partnerships with organizations that may be able to provide access to underserved communities through its business relationships and supplier networks.

**Table 4.4: Business Sustainability Goal SMART Tasks**

<b>Goal: Prioritize Business Sustainability</b>	
<b>Objective: Being Leaders in Business Management</b>	
<b>S</b>	Be a financial steward of public funds, providing the highest level of service, while conserving available resources
<b>M</b>	Increase the number of strategic partnerships with other agencies and businesses.
<b>A</b>	Develop phased approach for implementing business management best practices.
<b>R</b>	Incorporate annual review of business management processes into Strategic Plan
<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable  
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## Being Leaders In Business Management

The LOSSAN Agency continually strives to maintain and expand our ability to be a leader in managing passenger rail service and related responsibilities. This goal (Table 4.4) is foundational to being a trusted steward of local and statewide taxpayers, our partners and customers. Going forward, a key opportunity to use our Mission, Vision, and Goals as the focal point for organizing how we:

- Operate across all aspects of its business.
- Assess whether we are investing in services, goods, and processes that deliver the best value.
- Identify, align, and prioritize investments and activities in terms of short- and long-term needs and benefits.

Supporting this goal and others like fiscal responsibility also involves continually focusing on:

1. Securing reliable, predictable revenue sources for funding the LOSSAN Agency’s ongoing obligations, planned long-term construction projects, service and administrative needs, and reasonable contingencies.
2. Adopting sophisticated tools for capturing, analyzing and acting quickly upon changing costs, revenues, funding sources, and financing elements.

3. Tying fiscal policies and investments to actions producing measurable positive outcomes in important performance categories (usage, cost efficiency, and service quality) and their specific key performance indicators, such as:
- Passenger miles
  - Ridership
  - Farebox recovery
  - Cost per passenger mile
  - Endpoint OTP
  - All-station OTP
  - Operator responsible delays per 10,000 train miles.

Efforts to grow the LOSSAN Agency’s fiscal responsibility must also accommodate developing more comprehensive advocacy and partnership initiatives that maximize the benefits and resources available for LOSSAN rail corridor improvements. These efforts must also help minimize the obstacles and inefficiencies that arise from from the complex environment the LOSSAN Agency operates in (Table 4.5).

**Table 4.5: Organization Responsibilities**

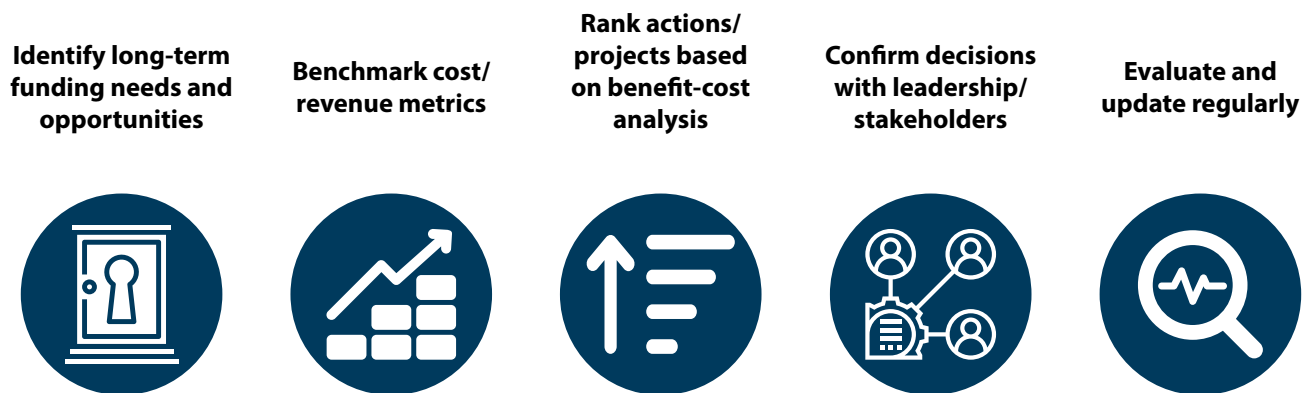
LOSSAN	Partners
LOSSAN is responsible for creating opportunities to increase revenue from fares and sources such as advertising, food and beverage sales, revenue.	State and federal governments also have revenue-generation roles, notably being the sources of significant operating subsidies and grants.
LOSSAN provides administration and maintenance supervision of the Pacific Surfliner fleet.	Amtrak conducts all maintenance activities related to the Pacific Surfliner service as part of the annual operating contract.
LOSSAN primarily serves in an oversight and coordination role with regard to safety and security aboard trains, relying on the extensive on-board safety and security programs and policies put in place by Amtrak.	The Federal Railroad Administration (FRA) and the California Public Utilities Commission (CPUC) oversee general railroad safety along the LOSSAN rail corridor.
LOSSAN provides standalone transportation services. But it also increasingly the spine of a regionally integrated transportation network.	LOSSAN coordinates with agencies like Metrolink and NCTD to sustain and expand the ease with which people travel within and through the region, and it is looking to do so in a way that more equitably distributes revenue and expenses.

## A Long-Term Financial Plan is the Foundation of Business Management Leadership

The LOSSAN Agency believes that sound financial planning helps ensure financial health and the quality of service we provide our customers. A continually updated financial plan is the foundation of sustainability and sound capital investment planning. It also helps prove that organizational goals and aspirations are feasible by establishing the reasonableness of assumptions from leadership and staff about the LOSSAN Agency's current financial health, projected revenues, and future investment demands.

That is why the LOSSAN Agency recognizes we must continually improve our organizational talents and technologies for measuring and strengthening financial health and the financial feasibility of specific projects (Figure 4.4).

**Figure 4.4: Long-Term Financial Planning Framework**



*The LOSSAN Agency's long-term financial planning will require working with the Board, partners, and stakeholders, as well as looking to industry leaders and benchmarks, to establish mechanisms for gathering and acting on analysis related to costs, revenues, project costs and benefits, funding sources, and financing.*

Improved financial planning also will require elements dedicated to LOSSAN Agency-specific concerns, including:

- Capturing all direct and indirect operating costs;
- Highlighting areas for reducing overhead and maximizing resources;
- Creating appropriate investment policies and strategies for maximizing interest earnings;
- Introducing procedures for building short- and long-term cash operating and project reserves;
- Addressing cashflow issues, particularly upfront liquidity, and how they can negatively affect state and federal funding requiring local matches or that only reimburse after expenditures are made; and
- Accounting properly for revenues available to member agencies that could help supplement operations or capital growth within corridor territories.



## **Business Sustainability Begins Within**

In tandem with a long-term financial plan, the LOSSAN Agency's sustainability also depends upon understanding and integrating the diverse needs of employees, customers, partners, and community stakeholders into actionable plans and effective decisions. This is made easier by the LOSSAN Agency's focus on being:



1. *A purpose-driven organization.* One that provides a strong framework for evaluating potential decisions and their impacts. Our Mission and Vision, coupled with the goals and objectives necessary to achieve them, provide clear direction to staff and partners about what is important.
2. *A customer-centric organization.* The choices we make are shaped by whether the results will make it safer, easier, and more enjoyable for people to get to and from destinations that matter to them.
3. *An accountable organization.* Our values and drive for sustainability put a premium on employees and partners being responsible for delivering positive, measurable outcomes.

As a result, the LOSSAN Agency's organizational purposes are embedded in all our activities and makes customer service and value a requirement of all planning and actions taken.

## **Sustainability and External Elements**

Sustainability also requires looking for ways to communicate the LOSSAN Agency's Mission, Vision, and Goals to many different internal and external audiences in ways to leverage their support.

Internally, this can include investing in leadership development and training programs to support the growth and development of employees. This helps the LOSSAN Agency become an even more desirable place of employment while building a strong, capable, and dedicated team that is able to drive results and deliver value. It also can mean fostering a culture of innovation and continuous improvement by encouraging employees to think creatively and to identify and implement new ideas and approaches. This ensures that the LOSSAN Agency can adapt to a constantly and rapidly changing operational, financial, and political environment.

Externally, this can mean undertaking action-oriented civic and philanthropic efforts (Figure 4.5) to further strengthen relationships with stakeholders and ensure that the LOSSAN Agency is meeting their needs and expectations. This helps earn trust and support, while providing valuable insights and feedback for improvement.

**Figure 4.5: Action-Oriented Civic and Philanthropic Engagement**

### Community Engaged Learning & Research

Identify key stakeholders and their needs, interests, and expectations to help prioritize engagement and tailor communication.



### Direct Service

Provide philanthropic services and benefits to underserved communities to strengthen the LOSSAN Agency's reputational assets.



### Policy and Governance

Engage actively in policy advocacy that advances the LOSSAN Agency's ability to deliver services to effectively meet customer and partner needs.



### Community Organization and Activism

Work with and support local, regional and state organizations that advocate for improved, increased rail operations.



### Philanthropy

Support community causes in areas served by the LOSSAN Agency to further strengthen partnerships with local service areas.



### Corporate Social Responsibility

Measure regularly the civic and philanthropic engagement of the LOSSAN Agency and the impact it has on staff, partners, and the communities it serves.

## Opportunities and Challenges Ahead That Affect Prioritizing Business Sustainability

As the LOSSAN Agency takes steps to prioritize business sustainability, a variety of short- and long-term trends are in play that will have to be taken into account, such as:

1. Changes in customer travel patterns and frequency may introduce long-term uncertainty about farebox recovery rates and projected need for new or expanded service or amenities. Although discretionary travel has increased across many modes, it is unclear how sensitive travelers may be in the future to COVID resurgences or the appearance of other communicable illnesses. Additionally, many workers and travelers who are less price sensitive have moved their centers of work to home or remote locations, reducing their reliance on rail.
2. Inflation and rising costs potentially diminish the LOSSAN Agency's ability to plan for and construct much-needed infrastructure. The amount of time it takes for important maintenance, trackage, station and other projects means inflation impacts may compound in ways that cause such projects to be delayed years or indefinitely. This is despite current and potential state and federal increases in rail-related subsidies and investments.

3. Managing funding for infrastructure can pose their own challenges for the LOSSAN Agency. Multiple public- and private-sector sources of investment put a premium on making sure the investments are well coordinated to ensure full benefit. Many investment sources come with new or expanded performance measurement requirements that require considerable administrative resources to manage. These performance metrics are crucial to continue the funding streams and to secure additional future funding.
4. Improving service reliability is a constant challenge and requires timely (even predictive) maintenance and system technologies. This puts a premium on making sure adequate, redundant maintenance systems and facilities, along with trained personnel, are equal to the demands on the system. It also means that there will be a growing need for the LOSSAN Agency and partners to be able to deploy and maintain modernized digital technology and advanced software. This technology includes sensors, digitized power systems, remote monitoring, and data analytics.

### ***Using Technology to Drive LOSSAN Goals***

Responding to these and other opportunities and challenges will put great demands on the LOSSAN Agency's ability to appropriately deploy the right technologies, and will play a key role in how well we can prioritize business sustainability.

With the proper staff and tools for robust data collection and analysis, technology can create deeper, more actionable insights into passenger demographics, preferences, and needs. This is based on collecting and analyzing disparate data about numbers and changes in passenger counts and types (elderly, disabled, etc.); vehicle speeds, boardings, and on-time records; and other information. These not only can feed into cost-savings and customer-service decisions, but can help further enhance vehicle-utilization levels, enable more informed "right-sizing" initiatives, and allow for better long-term decision-making.

These data-driven insights have never been more critical to the LOSSAN Agency's sustainability, as they will underpin the success of our efforts to secure the funding needed to deliver services aligned with consumer wants, local needs, and state rail planning.



## Building Sustainability is a Multi-Tiered, Multi-Year Effort

The LOSSAN rail corridor remains underinvested from both a national and state perspective, and it has been for years. Southern California mobility could be enhanced with additional funding for capital and operational improvements. But this requires a multi-tiered effort that the LOSSAN Agency will focus on even more in the years ahead.

LOSSAN Agency staff will continue to work with CalSTA and Amtrak on cost-cutting measures and operational efficiencies to improve farebox recovery. They will continue working with Metrolink and NCTD to improve Rail 2 Rail fare programs with a goal of achieving more equitable cost and revenue distribution.

Pacific Surfliner trains historically enjoyed a farebox recovery rate above 50% for years (excluding core COVID-19 pandemic years), putting it in the top tier of transportation agencies nationally.

To grow coverage area, service offerings and other elements of operations, the LOSSAN Agency must explore a variety of opportunities for increasing revenue without necessarily

increasing fares. Among other efforts, these include:

- Restoring ridership losses from the pandemic.
- Building partnerships with major destinations/attractions to draw larger and newer customer groups.
- Enhancing loyalty programs to induce more trips by existing customer.
- Creating additional special event services.

A key long-term business sustainability strategy the LOSSAN Agency will employ is fully advocating for policies at the state and federal level to improve rail operations, increase funding for operations and capital needs, and allow better coordination and interoperability with connecting transit and rail services.

This is an organizational strength for the LOSSAN Agency, given the ability to partner with a broad range of stakeholders to jointly advocate for mutually beneficial policies, including: CCJPA, SJJPA, the CRCC, and RCTC. It involves engaging stakeholders to generate the kinds of new ideas, collaboration, and support necessary for prioritizing and strengthening the LOSSAN Agency's business sustainability in the decades ahead.



## 5. FULFILLING OUR MISSION

The LOSSAN Agency created the Strategic Plan Update ,including a formal mission and vision, along with the goals and objectives to achieve them, to improve its organization and services in ways that ensure positive customer experiences and contribute significantly to a better future for transportation in California.

The LOSSAN Agency's foundational mission and vision will sustain organizational success: the mission will guide strategic decisions, while the vision will help prioritize actions and allocate resources. Goals and objectives will provide focus and demonstrate progress as the LOSSAN Agency continuously improves.

All this for the goal of expanding and strengthening customer-focused rail and transit service in Southern California and throughout the state.

The LOSSAN Agency updated its Strategic Plan to improve its organization, services, and customer experiences. The plan focuses on desired outcomes to guide the LOSSAN Agency's short, medium, and long-term goals. This will make sure the LOSSAN Agency makes decisions that help customers and stakeholders, while shaping a better future for California transportation.

From a business sustainability perspective, the Strategic Plan Update creates and expands the LOSSAN Agency's opportunities to provide the best customer-focused rail service possible. This results in a solid foundation for maximizing customer satisfaction, resulting in the kinds of revenue, referrals, and reputation that fuels our ability to provide a first-class integrated transportation network with great amenities and destinations while seamlessly integrating with other transportation systems.

A critical aspect of the Strategic Plan Update was over a year of internal discussion and external stakeholder consultation that enabled LOSSAN Agency leadership and staff to develop a foundational Mission and Vision (Figure 5.1) for organizational success. In this framework, the:

- Mission will be used as a guide for strategic decisions by LOSSAN's board, leadership and staff.
- Vision will help prioritize actions taken in support of the LOSSAN Agency goals and objectives, allocate resources, and monitor performance in real time.

The Mission and Vision, combined with the Goals and Objectives they drive, will increasingly shape the LOSSAN Agency's internal planning and decision making at all levels as individual elements are synchronized over time, fully integrating the interplay of the Agency's:

- Annual workplan
- Annual Business Plan;
- Capital Improvement Program;
- Other staff recommendations; and
- Board of Directors deliberations and decisions

Additionally, the LOSSAN Agency's strategic planning framework will help better identify and capitalize on opportunities to leverage the policies and capital projects of its partners. This will be especially helpful for expanding and strengthening collaborative policy, planning, and improvement efforts with partners more quickly and effectively.

The result will be to improve the LOSSAN rail corridor's efficiency and effectiveness in serving regional needs. It will be easier to:

## Mission



To be California's premier transportation experience to the state's most desirable destinations.

## Vision



To be the foundation of southern California rail travel, fully integrated with out transit partners, helping travelers create lifelong memories by:

- Providing a high-quality customer experience;
- Achieving world class operations; and
- Ensuring long-term sustainability.

- Prioritize and focus multiagency efforts for results and financial efficiency and effectiveness;
- Develop the annual Capital Improvement Program to amplify the benefits of LOSSAN Agency partners' policies and investments;
- Identify and pursue state and federal formula and discretionary grant program funding aligned with the LOSSAN Agency's CIP;
- Improve flexibility and sustainability based on an improved ability to anticipate and respond to changing conditions without losing sight of longer-term goals; and
- Strengthen the LOSSAN Agency's capacity for meaningful performance measurement and reporting that makes us more accountable and transparent to our customers, partners, stakeholders, staff, and leadership.

The Strategic Plan Update creates broad areas of focus for action by the LOSSAN Agency and its partners. These focal areas will become increasingly specific and targeted over time as leadership and staff:

- Use the Strategic Plan Update and the recommendations developed as a framework for identifying and integrating ongoing planning initiatives.
- Inform organizational performance reporting through a LOSSAN Agency semi-annual report, board reports, and internal performance evaluations.
- The LOSSAN Agency itself evolves in focus, structure, and actions as the Strategic Plan Update recommendations are enacted in ways that realize our Mission, Vision, Goals, and Objectives.

## Maximize Customer Service

The LOSSAN Agency's focus on customer satisfaction will be even clearer in the future to everyone impacted by our service - our riders, staff, partners, and leaders - as this customer focus has real-world decision-making and operational impacts on how we conduct business.

This focus would begin with identifying initiatives likely to enjoy great success because they are driven by detailed input from customers. This rigorously sought feedback would:

- Identify areas where customers and partners believe improvements can be made and how they would measure the success of such improvements.
- Inform departmental performance reviews and action planning, ensuring that customer feedback is integrated into the organization's decision-making processes.

## Desired Strategic Plan Outcomes



Maximize Customer Focus by:

- Improving User Experience;
- Integrating with Destinations;
- Integrating with Transportation Partners; and
- Maintaining Sustainable Fares.

Optimize Operations by:

- Expanding Service;
- Providing Better System Performance; and
- Improving Regional Connectivity.

Prioritize Business Sustainability by:

- Being Fiscally Responsible;
- Being Environmentally Conscious;
- Supporting Equity and Inclusion; and
- Being Leaders in Business Management.

- Organize and drive the LOSSAN Agency's Board agendas to ensure that customer satisfaction is prioritized and that customer-focused initiatives receive the attention and resources they deserve.

The potential creation of a Customer Service Officer role would further signal a clear commitment to customer service. It would help ensure that initiatives related to improving the customer experience are carefully planned and executed in a way that is effectively integrated with the efforts of other departments. And it will help better ensure that the LOSSAN Agency can seamlessly offer:

- Better ticketing options and real-time service updates via mobile apps or in-station signage, making it easier for customers to plan their journeys and stay informed about any service disruptions or delays.
- Increased rolling stock that enables the Pacific Surfliner to offer more frequent services, which would reduce wait times and improving the overall customer experience.
- Improved customer-prioritized services and amenities, such as better and more reliable Wi-Fi, improved food and beverage options, and increased business-class services.
- Broader vendor partnerships, focusing on local businesses to offer fresher and more varied food options. Other elements that improve the cafe car experience include: QR code menus, app-based ordering, and at-seat food and beverage service.

This focus on maximizing customer service provides a powerful tool for prioritizing future capital improvements. This approach means the LOSSAN Agency will develop explicit standards for capital improvements tied directly to customer satisfaction improvements

to ensure that resources are used to address the most pressing customer needs. It further helps identify the most productive state and federal formula and discretionary funding opportunities, ones that can be tied to the LOSSAN Agency's customer satisfaction priorities.

### ***Integrate with Destinations***

Influencing these and other future decisions would be the parallel need to better integrate services with more customer-preferred destinations. These destinations will grow ever-more varied in type and location as the Southern California population grows more diverse in interests and demographics.

As a result, the LOSSAN Agency will become a more data-driven organization across all dimensions, including evaluating potential destinations. We will use a broader range of data sets and analytics to assess the viability of new destinations in terms of customer satisfaction and revenue, taking into account a range of factors including cost, ridership, ticket pricing, demographics, and new customer base segments.

Increased data sophistication will help the LOSSAN Agency take a more strategic approach to marketing. This will generate specific targets for increasing departure/destination partnerships based on customer satisfaction and a cost-benefit. The LOSSAN agency would also work more closely with existing and new destination partners to coordinate joint promotions and maximize the impact of marketing efforts.

As the LOSSAN Agency's destination-integration success grows, so too will the ability to provide integrated ticketing options. This will make it easier for customers to plan and book end-to-end trips, including connecting



more easily with other partner agencies. This will streamline their travel experience and make it more seamless as the Pacific Surfliner potentially expands into the Coast Route, Salinas Extension, and Coachella Valley corridors.

### ***Integrate with Transportation Partners***

The Strategic Plan Update envisions the LOSSAN Agency becoming an even more efficient, reliable, and customer-friendly organization that is the hub of an integrated passenger rail and transit network we help sustain and grow. This network will increasingly offer multi-agency coordinated schedules and services, allowing passengers to seamlessly transfer from one service to another to reach their desired destinations. As the LOSSAN Agency moves towards this outcome, we will benefit from increased ridership as our customers take advantage of the broadened travel options it offers.

The Strategic Plan Update positions the LOSSAN Agency in the interim to identify service gaps and better allocate resources to address these issues, improving service quality and reliability. Over time, the LOSSAN Agency will:

- Work with its partners (including using performance incentives) to strengthen on-time performance through system, schedule, and dispatching improvements, improving service reliability and dependability for its customers.
- Advance regional policies and goals that support higher ridership, equity, financial sustainability, customer experience, and a reduction in VMT.
- Improve connectivity to eastern communities in Riverside County and the Coachella Valley, coastal communities beyond Pacific Surfliner's current terminus

in San Luis Obispo, and north to the San Francisco Bay Area, which will expand service coverage and travel options for customers.

- Explore new or alternative solutions to persistent service gaps, such as first/last mile transit gaps, which will offer more seamless services for customers.

Overall, by taking these actions, the LOSSAN Agency could become a more efficient, reliable, and customer-friendly organization, better able to serve the needs of our customers and contribute to the development of a more sustainable transportation system.

### ***Maintain Sustainable Fares***



















As the LOSSAN Agency strengthens its customer focus over time, a logical consequence is a long-term improvement in fare sustainability. Organizations that are customer-centric find it easier to achieve long-term financial sustainability because they are more likely to offer:











- Clear and transparent fare structure that users find understandable and reflective of their expectations and marketplace conditions while also taking into account the organization's needs for operations, maintenance, and service enhancements.
- Promotions and discounts that meaningfully reward long-time riders, encourage new and existing riders to try new travel times and services (such as midweek travel and travel between underutilized station pairs).
- Streamlined fare and payment options that mutually benefit customers, partners, and the LOSSAN Agency itself.
- Periodic fare adjustments driven by data-supported decisions, that are well communicated as to necessity and, when possible, are accompanied by mechanisms that incentivize ridership, travel pre-



















payment, and customer convenience. Additionally, the LOSSAN Agency would look for opportunities to mitigate fare increases with trust-building circuit breakers that automatically move












- travelers into different ticket or discount programs if their travel patterns would be better supported by less costly options.
- if their travel patterns would be better supported by less costly options.

**Table 5.1: Maximize Customer Focus**

Goal: Maximize Customer Focus				
Objective: Improve User Experience				
<b>Specific</b>	Deliver a high-quality service to our customers.			
<b>Measurable</b>	90% of customers in customer survey respond that the overall trip was of high or very high quality.			
<b>Achievable</b>	Implement Board actions focusing on customer service and ways to improve the user experience.			
<b>Relevant</b>	Identify revenue sources for adequately funding actions to achieve goal (equipment improvements, technology solutions, etc.).			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Create Customer Service Officer role to help plan, coordinate and execute initiatives described throughout Strategic Plan Update as appropriate.			
	Create and regularly conduct LOSSAN-specific customer satisfaction surveys; communicate internally for department-specific follow-up evaluation and action planning.			
	Incorporate appropriate findings from customer satisfaction survey into departmental performance reviews.			
	Reorganize standing Board agenda to prioritize customer satisfaction focus in deliberations and action items.			
	Better integrated ticketing or real-time service updates via mobile app or in-station signing for better customer experience.			
	Increase rolling stock to increase service frequency.			
	Focus on upgrading customer-prioritized services and amenities (Wi-Fi, food and beverage options, business-class and other services).			
	Establish broader vendor partnerships (esp. with local businesses) in order to offer fresher, more varied food choice options.			
	Improve Cafe car experience by expanding implementation of QR code menus, app-based ordering; and at-seat food and beverage service.			
	Develop explicit prioritization standards for capital improvements tied directly to customer satisfaction improvements.			
	Develop and implement grant/funding pursuit plan(s) tied to customer satisfaction priorities.			
	Create new and expanded opportunities for providing customers with real-time access travel information and services for making travel decisions in their homes, businesses, at stations, and on trains.			
	Develop and propose implementation timeline to Board for adoption and organizational action.			
	Develop and implement objective standards for measuring progress and results of implementation timeline.			
Developing an implementation timeline and development cycle that can be logically integrated into LOSSAN's business plan, capital improvement plan and other pertinent planning documents.				
<i>Types of Supporting Actions:</i>  Administrative  Operational  Financial <i>Goal timeline: Short-term</i>				

Objective: Integrate with Destinations				
<b>Specific</b>	Assess departure/destination impacts in all business process development and decision-making.			
<b>Measurable</b>	Increase the number of departure/destination partnerships.			
<b>Achievable</b>	Identify and pursue customer-focused pre and post-trip destination partnerships.			
<b>Relevant</b>	Identify appropriate number of desired partnerships and the resources necessary for pursuing.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Develop process for evaluating potential destinations based on multi-factor customer-satisfaction benefit-cost analysis (cost, ridership, revenue, demographics, new customer base segments, etc.).			
	Develop marketing plan and target number for annual increase in departure/destination partnerships based on customer satisfaction BCA and staff/asset constraints.			
	Develop joint promotions and coordinated marketing efforts with existing and new destination partners to maximize impact.			
	Explore additional first/last mile partnerships that can assist travelers in getting to/from Surfliner stations from local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport.			
	Improve integrated ticketing options so customers can easily plan and book trips end to end, including connecting more easily with other partner agencies and LA Metro.			
	Expand service to three new emerging corridors: Coast Route; Salinas Extension; and Coachella Valley Route.			
	Focus on operational planning and improvements that appropriately focus on improving reliable, predictable rail service to destination partners			
<i>Types of Supporting Actions:</i>  Administrative  Operational  Financial <i>Goal timeline: Short-term</i>				

Objective: Integrate with Transportation Partners				
<b>Specific</b>	Identify service gaps/integrations needed for connections and first/last mile.			
<b>Measurable</b>	Increase the number of transportation service partnerships with existing partnerships as a baseline.			
<b>Achievable</b>	Develop and implement prioritized need-focused action plans to address gaps.			
<b>Relevant</b>	Integrate action plans into service planning activities.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Create an integrated passenger rail and transit network with coordinated schedules, allowing passengers to seamlessly transfer from service to service to reach their desired destinations.			
	Coordinate service more closely so as to increase destination, departure time, and travel length choices for travelers.			
	Identify service gaps, investment needs and appropriate investment levels.			
	Advance key regional policies and goals related to higher ridership, equity, financial sustainability, customer experience, and change in VMT.			
	Enable Amtrak multi-ride ticket holders, as well as potentially Metrolink Rail 2 Rail passengers, to make bicycle storage reservations electronically.			
	Coordinate signage design and layout with partner agencies to build consistency throughout the corridor.			
	Pilot a Station Host initiative in which station ambassadors are present at select Pacific Surfliner stations shared with Metrolink and/or COASTER to help direct passengers to the correct station platform and provide other information.			
	Distribute revenues accurately and equitably to the service providers involved in any trip.			
	Explore new or alternative solutions to persistent service gaps, such as first/last mile mobility gaps.			
	Work with its partners to strengthen on-time performance through system, schedule and dispatching improvements.			
	Leverage information generated by integrated ticketing technologies to better communicate real-time, pertinent travel information to customers and to optimize system operations and investments more effectively.			
	Create improved connectivity to eastern communities in Riverside County and the Coachella Valley, coastal communities beyond LOSSAN's current terminus in San Luis Obispo, and north to the San Francisco Bay Area.			
	Review potential opportunities for adjusting or expanding thruway bus services; coordinate with CCJPA and SJJPA in developing potential schedules for improving the service.			
	Expand Agency efforts to tap into expanded federal and state rail funding mechanisms.			
Explore additional incentive agreements to provide financial incentives to host railroads to help maintain and improve the current infrastructure and level of OTP.				
<i>Types of Supporting Actions:  Administrative  Operational  Financial Goal timeline: Short-term</i>				

Objective: Maintain Sustainable Fares				
<b>Specific</b>	Define what constitutes a sustainable fare structure between user expectations, marketplace conditions, and organizational needs.			
<b>Measurable</b>	Measure sustainable fare value balance via periodic price acceptance studies.			
<b>Achievable</b>	Conduct periodic price acceptance studies to develop dynamic fare structure and trigger points for fare or service increases.			
<b>Relevant</b>	Integrate studies, timing and required LOSSAN actions, if any, into Strategic Plan.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
<b>Supporting Actions</b>	<b>Action</b>	<b>Focus</b>	<b>Timeframe</b>	<b>Progress</b>
	Define with customer input what constitutes a sustainable fare structure that reflects user expectations, marketplace conditions and organizational needs (operations, maintenance, service/amenities enhancements, etc.).			
	Increase public awareness - and use - of existing California Everyday discounts.			
	Implement fare promotions as appropriate to encourage use by new riders and/or existing riders, particularly for midweek travel and travel between underutilized station pairs.			
	Enhance existing and new customer loyalty and referral programs, including the Amtrak Guest Rewards program, to retain existing customers and attract new riders.			
	Explore fare integration opportunities along the corridor, focusing on first and last mile connections and direct connections to popular destinations.			
	Rethink fare collection practices and streamline payment options to benefit itself, its customers and its communities.			
	Examine periodically the opportunities for increasing fares when they incentivize ridership, travel pre-payment and customer convenience.			
	Acclimate customer base to periodic rate adjustments based on timing and transparent factors (e.g. inflation rate, publicly announced major capital improvements and others) and pair the approach with mitigation strategies, such as trust-building circuit breakers that automatically move travelers into different ticket or discount programs if their travel patterns would be better supported by less costly options.			
<i>Types of Supporting Actions:</i>  Administrative  Operational  Financial <i>Goal timeline:</i> Short-term				

## Optimize Operations

### *Expand Service*

Implementation of the Strategic Plan Update over time will result in a LOSSAN Agency that collaborates even more closely with partners to identify, fund, and build effectively for future growth and expansion of its services and service areas.

Expanding the frequency of existing service, including special event trains, will require the LOSSAN Agency to significantly expand its capacity for meeting the growing demand for rail transportation. This includes identifying and securing the equipment and crews necessary to implement additional service, while aligning the increases with funding levels and ridership growth.

Further spurring this growth will be the development of more localized transit and passenger rail service that customers can use for more convenient transportation choices that meet their needs. The LOSSAN Agency's efforts to improve ticketing, fare, and trip planning integration between services would simplify the process for customers, making it easier to plan and book travel. Service and operational efficiencies also will be achieved by facilitating greater transit-oriented development, creating new opportunities to increase ridership and revenue gains.

As these and other factors generate additional ridership for the Pacific Surfliner in the years ahead, the LOSSAN Agency will also have to undertake significant effort to improve station and related passenger information. This includes items such as wayfinding signage, better passenger information display systems, and safety improvements. These will help create a more comfortable and user-friendly environment for an expanding base of regular and periodic customers.

### *Provide Better System Performance*

The LOSSAN Agency will continually seek to provide better system performance as part of our commitment to deliver the kind of reliable and convenient rail transit services customers desire. Improved system performance will arise from many different initiatives, including:

- Collaborating with Amtrak and Caltrans to identify equipment and crews necessary for additional services, as well as developing plans for optimizing crew and equipment utilization, in order to plan for and respond to changing demand patterns proactively.
- Prioritizing investments based on direct benefit to on-time performance will ensure that resources are allocated to produce the greatest positive impact on system performance.
- Building new and/or expanding existing maintenance facilities will help keep the Pacific Surfliner fleet of rail cars in good condition, thereby maximizing their safe and useful lifespan.
- Developing specialized training programs will enable the LOSSAN Agency to accommodate specific service expansions and help ensure that staff are well-equipped to provide high-quality service to customers.
- Implementing a fully pulsed schedule will enable the LOSSAN Agency to optimize train schedules and improve overall system performance.

In the years ahead, the LOSSAN Agency will continue deploying technologies that help ensure better overall system performance. This will help reduce downtime and improve the overall reliability of its system by using:














- Track monitoring technologies for real-time analysis of track health and potential issues.
- Predictive maintenance technologies to identify potential issues with rail assets before they occur. Real-time tracking and management of rail assets, such as rolling stock and infrastructure, to better monitor and schedule equipment repair or replacement in a cost-effective manner.

### ***Improve Regional Connectivity***
















Improving system performance also will play a role in developing action plans for service expansions and improving regional connectivity without negative impacts. This will grow in importance in the future as the LOSSAN Agency looks to extend passenger rail services to the San Diego Convention Center and National City, accommodate anticipated freight rail growth between Los Angeles and Fullerton, modify service options into the existing transit and rail network operations between Moorpark and San Luis Obispo, provide advisory services for developing regional rail service between Monterey and Santa Cruz, create a Pacific Surfliner connection in San Jose to the Capitol Corridor or Caltrain, and implement higher speed and enhanced safety alternatives along the San Diego Subdivision.










This enhanced regional connectivity will mean the LOSSAN Agency will deploy and manage a well-maintained fleet of rolling stock and related infrastructure, a skilled and well-trained workforce, and strong partnerships with other agencies and stakeholders. We will collaborate with Amtrak, Caltrans, and other partners to optimize crew and equipment utilization and identify opportunities for greater utilization of existing equipment to increase service frequency. Finally, we will support the development of more localized transit and passenger rail service alternatives and work with member agencies and others to integrate new, modified, or expanded service options into the existing transit and rail network operations.

**Table 5.2: Optimize Operations**

<b>Goal: Optimize Operations</b>				
<b>Objective: Expand Service</b>				
<b>Specific</b>	Increase train frequency to hourly round trips south of LA and two-hour round trips north of LA.			
<b>Measurable</b>	Schedule 18 bi-directional trains daily south of LA and nine (9) bi-directional trains daily north of LA and include increased special event trains.			
<b>Achievable</b>	Develop and implement an action plan for purchasing more rolling stock and hiring/training the requisite number of crew.			
<b>Relevant</b>	Incorporate action plan and defined funding source(s) into Strategic Plan.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
<b>Supporting Actions</b>	<b>Action</b>	<b>Focus</b>	<b>Timeframe</b>	<b>Progress</b>
	Work with Caltrans and Amtrak on identifying expansion-driven needs for more siding and double track; equipment and crews; layover facilities; coordination between host railroads; and staff and training.			
	Identify future opportunities to leverage funding sources to advance capital projects that have a corridor-wide benefit for OTP, capacity, and expansion.			
	Collaborate with local transit agencies to explore opportunities to expand service from Pacific Surfliner stations to local airports.			
	Improve station and related passenger information, wayfinding signage and safety improvements.			
	Facilitate greater transit-oriented development (TOD) to increase ridership and associated revenue gains and to improve operational efficiencies.			
	Expand the frequency of existing service, including special event trains, along with the necessary rolling stock and crew, by maximizing system efficiency via targeted investments.			
	Increase ridership on existing frequencies through faster, integrated train schedules; improved reliability; and better transit connectivity (including investment in layover facilities).			
	Identify equipment and crews necessary to implement additional service aligned with funding levels and ridership growth.			
	Develop more localized transit and passenger rail service alternatives to improve corridor service and to provide customers with the most appropriate mobility choice for their needs.			
	Continue efforts at easier ticketing, fare and trip planning integration between services.			
<i>Types of Supporting Actions:  Administrative  Operational  Financial Goal timeline: Short-term</i>				



Objective: Provide Better System Performance				
<b>Specific</b>	Improve on-time performance and increase ridership and revenue.			
<b>Measurable</b>	Measure on-time performance, ridership and revenue based on performance metrics as dictated by the interagency transfer agreement.			
<b>Achievable</b>	Purchase specific LOSSAN trip planning software.			
<b>Relevant</b>	Identify organizational strategies and potential trigger points for improving on-time performance and ridership.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
<b>Supporting Actions</b>	<b>Action</b>	<b>Focus</b>	<b>Timeframe</b>	<b>Progress</b>
	Collaborate with Amtrak and Caltrans to identify equipment and crews necessary for additional services as well as develop plans for optimizing crew and equipment utilization.			
	Prioritize investments, in part, on their direct benefit to on-time performance.			
	Make a final determination regarding the purchase of passenger rail cars and their impact on integrating into the statewide fleet management plan.			
	Build new and/or expand existing maintenance facilities to maximize the safe, useful lifespan of the LOSSAN rail fleet.			
	Develop and implement specialized training as needed to accommodate specific service expansions.			
	Identify opportunities for greater utilization of existing equipment to increase existing Pacific Surfliner service frequency.			
	Implement fully Pulse Scheduling.			
	Use track monitoring technologies for real-time analysis of track health and potential issues, helping identify potential problems and needed action before rail service is disrupted.			
	Deploy predictive maintenance technologies to identify potential issues with rail assets before they occur, allowing for proactive repairs and maintenance that reduce downtime and improve the reliability of rail systems.			
	Enhance real-time tracking and management of rail assets, such as rolling stock and infrastructure, to improve control over rail assets, as well as enhance asset utilization and maintenance.			
	Develop plan for taking over the leases on selected stations and acquiring passenger rail cars to better integrate into the statewide fleet management plan and to share resources more easily and efficiently with other two state-supported corridors.			
	Identify and address operator-responsible delays such as signal delay, slow orders, and maintenance of way.			
	Work with the operators on dispatch policies related specifically to Positive Train Control (PTC) and better managing train movements to avoid delays, collisions and other issues.			
Partner with member agencies and others to develop more localized transit and passenger rail service alternatives to improve corridor performance and to provide customers with the most appropriate mobility choice for their needs.				
Develop an action plan for extending passenger services to the San Diego Convention Center and/or National City while also addressing anticipated freight rail demand growth to avoid performance issues.				

Objective: Provide Better System Performance (continued)			
Develop an action plan for accommodating anticipated freight rail growth without negatively affecting passenger service between Los Angeles and Fullerton.			
Integrate new, modified or expanded service options into the existing transit and rail network operations between Moorpark and San Luis Obispo without negatively impacting overall performance.			
Support establishing a network of intercity rail and bus routes between Goleta and Salinas as well as regional passenger rail service for locations within San Luis Obispo County not easily served by existing Pacific Surfliner service.			
Provide advisory services for developing regional rail service between Monterey and Santa Cruz.			
Create a Pacific Surfliner connection to the Capitol Corridor in ways that leverage existing LOSSAN resources and performance.			
Implement higher speed and enhanced safety alternatives along the San Diego Subdivision, including relocating the rail alignment off sensitive coastal bluffs in the City of Del Mar, to avoid delays that affect OTP and other operational aspects.			
<i>Types of Supporting Actions:</i>  Administrative  Operational  Financial <i>Goal timeline: Short-term</i>			

Objective: Improve Regional Connectivity				
<b>Specific</b>	Increase regional train service to more destinations.			
<b>Measurable</b>	Expand or establish service to new destinations and special events.			
<b>Achievable</b>	Develop and implement an action plan, schedule and defined funding source(s) for adding or expanding to top 5 area or destination.			
<b>Relevant</b>	Incorporate action plan, schedule and defined funding source(s) into Strategic Plan.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Standardize data collection and reporting across different rail agencies.			
	Improve operations by integrating data collection and analysis from different rail agencies, including ridership data, schedules, and infrastructure information.			
	Establish common privacy and security protocols to protect sensitive information, including implementing such measures as encryption, access controls, and data governance policies to safeguard data from unauthorized access or misuse.			
	Build out the capacity and expertise to collect, analyze, and interpret data in order to effectively coordinate services, including investing in staff training and development, as well as the necessary tools and technology.			
	Identify, prioritize and deliver on infrastructure and other improvements that grow transportation services in and around the LOSSAN rail corridor while building upon the existing success of the Pacific Surfliner service.			
	Provide customers with the ability to plan entire door-to-door trips and purchase a single ticket using a streamlined trip-planning portal.			
	Enable customers to transfer quickly and easily between high-speed, intercity, and regional trains, express buses, and transit at hub stations by providing coordinated arrivals and departures with significantly reduced wait times.			
	Study and pursue expansion opportunities on emerging corridors that provide connectivity within Southern California and beyond.			
	Work cooperatively with Caltrans DRMT to ensure sufficient state funding is provided to operate Pacific Surfliner and its Amtrak Thruway bus services and to expand rail service, ridership, revenue, and on-time performance.			
	Develop multi-agency (Metrolink, Amtrak, NCTD, as well as Metro and MTS) solutions that provide easier integration for passengers between services.			
	Support transit-oriented development by advocating for policies, projects and initiatives that will enhance connectivity and support the growth of transit-oriented development in the region.			
	Move forward with integrated ticketing concepts in collaboration with Caltrans DRMT, NCTD, and Metrolink that will create a user friendly and standard interface for passengers to purchase tickets and transfer between services.			
	Explore fare integration opportunities as well as trip-planning resources that focus on first- and last-mile connections and direct connections to popular destinations.			
	Investigate opportunities to increase fare revenue in a variety of ways: raising fares; securing partnerships and underwriting from major destinations/attractions; enhancing loyalty programs; and expanding special event service.			
	Refine periodically the LOSSAN safety plan to take into account any specific issues or challenges presented by an expanded service area or increased diversity of destinations and prioritize safety policies and investments accordingly.			
Types of Supporting Actions:  Administrative  Operational  Financial Goal timeline: Short-term, Mid-term, Long-term				

Objective: Improve Regional Connectivity (continued)				
	Investigate opportunities to increase fare revenue in a variety of ways: adjusting fares; securing partnerships and underwriting from major destinations/attractions; enhancing loyalty programs; and expanding special event service.	\$		
	Refine periodically the LOSSAN Agency safety plan to take into account any specific issues or challenges presented by an expanded service area or increased diversity of destinations and prioritize safety policies and investments accordingly.	👤		
<i>Types of Supporting Actions:</i> 👤 Administrative ⚙️ Operational 💰 Financial <i>Goal timeline:</i> Short-term				

## **Prioritize Business Sustainability**

### ***Be Fiscally Responsible***

The LOSSAN Agency continually improves our focus on fiscal responsibility in order to be better positioned to weather economic uncertainties and capitalize on growth opportunities. This involves identifying and maximizing existing revenue streams, as well as developing new revenue generation scenarios that are reliable and sustainable over the long term.

By doing this, the LOSSAN Agency strengthens our strategic approach to assessing potential growth opportunities, including market expansion and new product and service launches, while taking into account financial and operational realities and capabilities. The foundation of this approach in the years ahead includes:

- Maintaining a healthy fund balance and reserve policy as a buffer against unexpected expenses or revenue shortfalls.
- Advocating effectively and continually for sustainable local, state, and federal formula and discretionary funding sources.
- Developing policies and protocols for making complex decisions about service cuts and adjustments in response to changing ridership trends and other economic factors, while still prioritizing reliable and predictable service to destination partners.

This strong fiscal focus is a critical key for operational planning and improvements that optimize resource utilization and minimize waste, while still maintaining high service quality standards. It also ensures that the LOSSAN Agency is always well-positioned to navigate a rapidly changing transportation landscape and to continue delivering high-quality rail transit services to our customers over the long term.

### ***Be Environmentally Conscious***

The LOSSAN Agency and the values underpinning our Mission and Vision call for us to be an environmentally conscious organization focused on reducing our carbon footprint and minimizing negative environmental impacts of our actions.

To achieve this as we expand services and service areas, the LOSSAN Agency increasingly will rely on environmentally responsible suppliers and materials sourced locally to reduce the carbon emissions associated with the transportation and production processes. These will be identified as part of regular and ongoing audits and analyses of our services and operations to identify opportunities for improvement while also improving the quality of the goods and services the LOSSAN Agency procures.

A major emphasis area for the LOSSAN Agency will be on taking steps to reduce our carbon footprint. The Amtrak Thruway bus service's reliance on more environmentally friendly fuels such as electric battery, hydrogen or other technologies will be expanded as new contractors are procured. The Pacific Surfliner will also move beyond using Tier 4 locomotives to zero-emission units relying on

hydrogen, battery electric or other emerging technologies as they become available. Steps like this will be further leveraged by putting in place environmentally supportive administrative actions such as reducing train idling time or using on-train café car products that minimize non-biodegradable packaging waste.

The importance of this effort will prompt the LOSSAN Agency to seek opportunities to partner with other organizations on environmentally friendly process and technology improvements when appropriate. These partnerships will include sharing resources and development investments in order to drive innovation, including sharing development costs to drive environmental innovation and sustainability that benefits customers and Southern California.

Overall, a rail transit agency that prioritizes business sustainability by being environmentally conscious would focus on reducing its carbon footprint, minimizing negative environmental impacts, and seeking out sustainable and environmentally responsible practices and partnerships.

### ***Be Leaders in Business Management***

The LOSSAN Agency's development of the Strategic Plan Update and the creation of a Mission and Vision, along with their supporting goals and objectives, is a reflection of our history as an organization that prioritizes business sustainability.

Within our organization, that sustainability is recognized as being built from strong business management, a robust financial foundation and a culture of continuous improvement. These are created by securing reliable and predictable revenue sources; adopting sophisticated tools for capturing, analyzing, and acting quickly upon changing costs, revenues, funding sources, and financing elements; and tying fiscal policies and investments to measurable positive outcomes in key performance categories.













This will be captured in the creation and periodic updating of a long-range financial plan that ties together the LOSSAN Agency's current financial health, projected revenues, and future investment demands. This will go hand in hand with strengthened internal processes for highlighting areas for reducing overhead and maximizing agency resources. Together, these will be the impetus for further improving organizational talents and technologies for financial analysis.

The Strategic Plan Update, when fully incorporated into all aspects of LOSSAN Agency's operations, will require appropriate investment policies and strategies for maximizing interest earnings and building short- and long-term cash operating and project reserves. These will ensure the LOSSAN Agency can appropriately address cashflow issues, particularly upfront liquidity, and account properly for revenues available to member agencies, which could help supplement operations or capital growth within corridor territories.











An important outcome of this focus is the LOSSAN Agency's sustained investment in leadership development and training programs to support the growth and development of its employees, foster a culture of innovation and continuous improvement, and fully and successfully implement the Strategic Plan Update.




**Table 5.3: Prioritize Business Sustainability**

<b>Goal: Prioritize Business Sustainability</b>				
<b>Objective: Be Fiscally Responsible</b>				
<b>Specific</b>	Generate sufficient revenue to meet ongoing obligations, fund long-term needs, and maintain sufficient reserves to address atypical or one-off events (e.g. natural disaster/pandemic).			
<b>Measurable</b>	Costs measured against annual revenue and state subsidy.			
<b>Achievable</b>	Develop likely revenue-requirement scenarios and measure current and projected revenue against them to identify future fiscal needs.			
<b>Relevant</b>	Incorporate process into annual workplan.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
<b>Supporting Actions</b>	<b>Action</b>	<b>Focus</b>	<b>Timeframe</b>	<b>Progress</b>
	Identify existing revenue streams and gauge their reliability.	💰		
	Develop revenue requirements and generation scenarios.	💰		
	Create more sophisticated approaches for assessing potential growth opportunities like expanding into new markets or launching new products/services.	💰		
	Establish a fund balance and reserve policy for setting and maintaining minimum levels for designated funds (and their sources).	💰		
	Expand advocacy and programmatic analysis designed to maximize our share of long-term, sustainable local, state and federal funding sources.	👤		
	Develop service cut scenarios, strategies, and “triggers” for responding to ridership declines with appropriate types, timing and depth of service changes.	👤		
	Collaborate with state and JPA partners to develop a comprehensive system of responses to emergencies and memorialize them mutual aid agreements.	👤		
	Focus on operational planning and improvements that appropriately focus on improving reliable, predictable rail service to destination partners.	💰		
	Prioritize grant planning and funding applications to maximize state and federal discretionary funding received by LOSSAN.	👤		
Develop more robust cost-benefit analysis of individual projects earlier during capital project planning and development and to better position for grant pursuits.	💰			
<i>Types of Supporting Actions: 👤 Administrative ⚙️ Operational 💰 Financial</i> <i>Goal timeline: Short-term</i>				

Objective: Be Environmentally Conscious				
<b>Specific</b>	Reduce environmental impact			
<b>Measurable</b>	Minimize impact on California air, water and soil from reduced emissions			
<b>Achievable</b>	Set organizational “stretch” goals for environmental stewardship and measurements of success			
<b>Relevant</b>	Incorporate environmental stewardship requirements in all LOSSAN planning documents including equipment procurement			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
<b>Supporting Actions</b>	<b>Action</b>	<b>Focus</b>	<b>Timeframe</b>	<b>Progress</b>
	Seek out environmentally responsible suppliers and source materials locally to reduce its carbon footprint.			
	Analyze services and operations regularly to identify new policies or actions to eliminate or minimize negative environmental impacts.			
	Expand the Amtrak Thruway bus service reliance on more environmentally friendly fuels such as electric battery, hydrogen or other technologies.			
	Move beyond using Tier 4 locomotives (the lowest-emission diesel locomotives currently in operation) to zero-emission units relying on hydrogen, battery electric or other emerging technologies.			
	Put in place environmentally supportive administrative actions such as reducing train idling time or using on-train café car products that minimize non-biodegradable packaging waste.			
	Conduct regular and wide-ranging environmental audits to identify opportunities for reducing environmental impact while improving the quality of the goods and services offered.			
	Align the audit process and procurement system to better identify vendors and others who can provide more environmentally friendly and sustainable product design, production methods, packaging materials and operational processes.			
	Seek opportunities to partner with other organizations on environmentally friendly process and technology improvements, including sharing resources and development investments in order to drive innovation. including sharing development costs.			
	Prioritize grant planning and funding applications to maximize state and federal discretionary funding received by the LOSSAN Agency.			
<i>Types of Supporting Actions:  Administrative  Operational  Financial      Goal timeline: Short-term</i>				



Objective: Support Equity and Inclusion				
<b>Specific</b>	Remove unconscious barriers that preclude customers based on their race, ethnicity, gender/gender identity, sexual orientation/identity or ability/disability			
<b>Measurable</b>	Identify and prioritize eliminating barriers based on ridership services			
<b>Achievable</b>	Convene a process driven by user- and non-user communities to identify barriers and solutions.			
<b>Relevant</b>	Assign functional-specific LOSSAN champions to develop action plans for resolving issues.			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Review hiring, contracting, and other internal policies and processes regularly to minimize or eliminate any risks of unconscious bias.			
	Develop a plan for engaging regularly in communities the LOSSAN Agency serves through planning outreach, communication, charitable involvement and other community-specific means to strengthen mutual trust and support.			
	Expand inclusivity by making sure communications - from websites to fliers to customer support - are accessible and provided in multiple languages and convenient-to-use forums and formats.			
	Increase business opportunities for minority-, women-, LGBTQ+ and veteran-owned businesses, including small and DBE firms and firms owned by people with disabilities.			
	Measure the numbers and demographics of job applicants and customers regularly to identify shortfalls in expected participation and developing solutions to increase underrepresented populations.			
	Examine policies and processes periodically for potential biases or discriminatory practices, comparing them to industry best practices and using independent third-party experts when necessary to spot organizationally unconscious bias.			
	Explore opportunities to form partnerships with organizations that may be able to provide access to underserved communities through its business relationships and supplier networks.			
Types of Supporting Actions:  Administrative  Operational  Financial Goal timeline: Short-term				

Objective: Be Leaders in Business Management				
<b>Specific</b>	Be a financial steward of public funds, providing the highest level of service, while conserving available resources			
<b>Measurable</b>	Increase the number of strategic partnerships with other agencies and businesses.			
<b>Achievable</b>	Develop phased approach for implementing business management best practices.			
<b>Relevant</b>	Incorporate annual review of business management processes into Strategic Plan			
<b>Timely</b>	Establish implementation timeline as part of the annual workplan.			
Supporting Actions	Action	Focus	Timeframe	Progress
	Secure reliable, predictable revenue sources for funding ongoing obligations, planned long-term construction, service and administrative needs, and reasonable contingencies.	Financial		
	Adopt sophisticated tools for capturing, analyzing and acting quickly upon changing costs, revenues, funding sources, and financing elements.	Administrative		
	Tie fiscal policies and investments to actions producing measurable positive outcomes in important performance categories (usage, cost efficiency, and service quality) and their specific key performance indicators.	Financial		
	Create and update periodically a long-range financial plan that adaptably accounts for and responds to leadership and staff inputs about the LOSSAN Agency's current financial health, projected revenues, and future investment demands.	Financial		
	Obtain and improve organizational talents and technologies for measuring and strengthening LOSSAN financial analysis and planning on a project, program and organizational level.	Administrative		
	Develop internal processes for better highlighting areas for reducing overhead and maximizing Agency resources.	Administrative		
	Create and adopt appropriate investment policies and strategies for maximizing interest earnings.	Administrative		
	Introduce procedures for building short- and long-term cash operating and project reserves	Administrative		
	Address cashflow issues, particularly upfront liquidity, and how they can negatively affect state and federal funding requiring local matches or that only reimburse after expenditures are made	Financial		
	Account properly for revenues available to member agencies that could help supplement operations or capital growth within corridor territories.	Financial		
	Invest in leadership development and training programs to support the growth and development of the agency's employees.	Administrative		
	Foster a culture of innovation and continuous improvement by encouraging employees to think creatively and to identify and implement new ideas and approaches.	Administrative		
	Undertake action-oriented civic and philanthropic efforts to strengthen relationships with stakeholders and gain valuable insights and feedback for service and operational improvements.	Administrative		
Invest in the proper staff and tools for conducting robust data collection and analysis in order to create deeper, more actionable insights into passenger demographics, preferences and needs.	Administrative			
Types of Supporting Actions:  Administrative  Operational  Financial Goal timeline: Short-term				

# Strategic Plan Appendix A



## APPENDIX A: Federal and State Discretionary Grants – Program Details

### CONSOLIDATED RAIL AND INFRASTRUCTURE SAFETY IMPROVEMENTS (CRISI) PROGRAM

<b>GRANTOR</b>	Federal Railroad Administration (FRA)
<b>PURPOSE</b>	Investments that improve the safety, efficiency, and reliability of intercity passenger and freight rail
<b>ELIGIBLE PROJECTS</b>	<ul style="list-style-type: none"> <li>• Capital projects which meet the purpose of the program</li> <li>• Safety programs, including workforce development</li> <li>• Measures that prevent trespassing and injuries and fatalities associated with trespassing</li> <li>• Research, development, and testing to advance innovative rail projects</li> <li>• The preparation of emergency plans for communities through which hazardous materials are transported by rail</li> <li>• Locomotive improvements, provided that such activities result in a significant reduction of emissions</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Up to \$2 billion per year through 2026
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$7 million, but likely larger in future
<b>MATCH REQUIREMENT</b>	20 percent. Overmatch has been an evaluation factor in the past
<b>SCHEDULE FOR SOLICITATION</b>	No set schedule, but generally Summer / Fall

### FEDERAL-STATE PARTNERSHIP FOR INTERCITY PASSENGER RAIL PROGRAM

<b>GRANTOR</b>	FRA
<b>PURPOSE</b>	To fund capital projects that reduce the state of good repair backlog, improve performance, or expand or establish new intercity passenger rail service
<b>ELIGIBLE PROJECTS</b>	<ul style="list-style-type: none"> <li>• Replacement, rehabilitation, or repair of infrastructure, equipment, or a facility used for providing intercity passenger rail service</li> <li>• Projects to improve intercity passenger rail service performance,</li> <li>• Projects to expand or establish new intercity passenger rail service</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Up to \$8.7 billion per year through 2026
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	Not yet known
<b>MATCH REQUIREMENT</b>	20 percent
<b>SCHEDULE FOR SOLICITATION</b>	Not yet known

**RAILROAD CROSSING ELIMINATION PROGRAM**

<b>GRANTOR</b>	FRA
<b>PURPOSE</b>	To fund highway-rail or pathway-rail grade crossing improvement projects that focus on improving the safety and mobility of people and goods
<b>ELIGIBLE PROJECTS</b>	<ul style="list-style-type: none"> <li>Grade separation or closures</li> <li>Track relocation</li> <li>Improvement or installation of protective devices, signals, signs, or other measures to improve safety related to separation, closure, or track relocation projects</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>Planning/environmental: Y</li> <li>Design: Y</li> <li>Construction: Y</li> <li>O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Up to \$1.1 billion per year through 2026
<b>MINIMUM/MAXIMUM AWARD</b>	Minimum grant size for non-planning grants: \$1 million
<b>AVERAGE AWARD</b>	Not yet known
<b>MATCH REQUIREMENT</b>	20 percent
<b>SCHEDULE FOR SOLICITATION</b>	Not yet known

**AMTRAK NATIONAL NETWORK GRANTS**

<b>GRANTOR</b>	FRA
<b>PURPOSE</b>	For capital projects for the purpose of eliminating the backlog of obsolete assets and Amtrak's deferred maintenance backlog of rolling stock, facilities, stations, and infrastructure
<b>ELIGIBLE PROJECTS</b>	<ul style="list-style-type: none"> <li>Buying new cars to replace single-level passenger cars, plus associated costs</li> <li>Bringing Amtrak-served stations to full Americans with Disabilities Act compliance</li> <li>Eliminating the deferred capital backlog on sole-benefit Amtrak-owned assets</li> <li>Projects to eliminate the backlog of obsolete assets associated with Amtrak's national rail passenger transportation system, such as systems for reservations, security, training centers, and technology</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>TBD</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Average of up to \$5.73 billion per year through 2026
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	Not yet known
<b>MATCH REQUIREMENT</b>	N/A
<b>SCHEDULE FOR SOLICITATION</b>	USDOT must submit "spend-plan" to Congress with each annual budget request (each February)

**RESTORATION AND ENHANCEMENTS GRANTS**

<b>GRANTOR</b>	FRA
<b>PURPOSE</b>	To provide operating assistance to initiate, restore, or enhance intercity passenger rail service
<b>ELIGIBLE PROJECTS</b>	Costs associated with the following: <ul style="list-style-type: none"> <li>• Establishing new services</li> <li>• Increased frequencies</li> <li>• Service extensions</li> <li>• Offering new on-board services</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: N</li> <li>• Design: N</li> <li>• Construction: N</li> <li>• O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	\$50 million through 2026
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$6 million
<b>MATCH REQUIREMENT</b>	<ul style="list-style-type: none"> <li>• 10 percent of operating costs for 1st year of service</li> <li>• 20 percent for 2nd year</li> <li>• 30 percent for 3rd year</li> <li>• 40 percent for 4th year</li> <li>• 50 percent for 5th year</li> <li>• 70 percent for 6th year of service.</li> </ul>
<b>SCHEDULE FOR SOLICITATION</b>	No set schedule; in past FRA has issued NOFOs every other year combining two years of funding

**LOCAL AND REGIONAL PROJECT ASSISTANCE PROGRAM**

<b>GRANTOR</b>	USDOT Office of the Secretary
<b>PURPOSE</b>	To fund eligible projects that will have a significant local or regional impact and improve transportation infrastructure.
<b>ELIGIBLE PROJECTS</b>	Any surface transportation capital project, including intercity passenger rail and railway-highway grade separation or elimination
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Up to \$3 billion per year through 2026, split between urban and rural areas
<b>MINIMUM/MAXIMUM AWARD</b>	\$5 million minimum / \$25 million maximum for capital projects in urban areas. No minimum for planning grants
<b>AVERAGE AWARD</b>	\$11 million in FY 2021
<b>MATCH REQUIREMENT</b>	20 percent
<b>SCHEDULE FOR SOLICITATION</b>	60 days after President signs annual appropriations bill

**NATIONAL INFRASTRUCTURE PROJECT ASSISTANCE PROGRAM**

<b>GRANTOR</b>	USDOT Office of the Secretary
<b>PURPOSE</b>	To support multimodal, multi-jurisdictional projects of national or regional significance
<b>ELIGIBLE PROJECTS</b>	Several capital projects, including intercity passenger rail and railway-highway grade separation or elimination
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	Up to \$3 billion per year through 2026 split between projects costing more than \$500 million and between \$100-\$500 million
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	Not yet known
<b>MATCH REQUIREMENT</b>	Program funds 60 percent of costs. Other federal funds may be used to fund up to 80 percent of costs. 20 percent non-federal match requirement
<b>SCHEDULE FOR SOLICITATION</b>	Not yet known

**SURFACE TRANSPORTATION BLOCK GRANT PROGRAM**

<b>GRANTOR</b>	Federal Highway Administration (FHWA)
<b>PURPOSE</b>	To provide flexible funding to address State and local transportation needs
<b>ELIGIBLE PROJECTS</b>	Several capital projects, including highway-railroad crossings
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	TBD
<b>MINIMUM/MAXIMUM AWARD</b>	None, unless set by State DOT or MPO
<b>AVERAGE AWARD</b>	N/A
<b>MATCH REQUIREMENT</b>	20 percent
<b>SCHEDULE FOR SOLICITATION</b>	Set by State DOTs and MPOs

**CONGESTION MITIGATION AND AIR QUALITY IMPROVEMENT PROGRAM**

<b>GRANTOR</b>	FHWA
<b>PURPOSE</b>	To provide a flexible funding source to State and local governments for transportation projects and programs to help meet the requirements of the Clean Air Act.
<b>ELIGIBLE PROJECTS</b>	Any transportation project or program that is likely to contribute to the attainment or maintenance of a national ambient air quality standard, with a high level of effectiveness in reducing air pollution, including intercity passenger rail, and operating costs associated with Amtrak service.
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	TBD
<b>MINIMUM/MAXIMUM AWARD</b>	None, unless set by State DOT or MPO
<b>AVERAGE AWARD</b>	N/A
<b>MATCH REQUIREMENT</b>	20 percent
<b>SCHEDULE FOR SOLICITATION</b>	Set by State DOTs and MPOs

**TRANSIT AND INTERCITY RAIL CAPITAL PROGRAM (TIRCP)**

<b>GRANTOR</b>	California State Transportation Agency (CalSTA), California Transportation Commission (CTC) and Caltrans
<b>PURPOSE</b>	Modernize rail and transit systems to improve service and reduce GHG emissions
<b>ELIGIBLE PROJECTS</b>	A small number of transformative rail and transit improvements that decrease GHG emissions by increasing capacity and ridership while integrating transit systems and improving transit safety
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y (prioritized)</li> <li>• O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	~\$500 million per year
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$29 million
<b>MATCH REQUIREMENT</b>	None, but preferred
<b>SCHEDULE FOR SOLICITATION</b>	Biennial Call for Projects.

**STATE RAIL ASSISTANCE (SRA) COMPETITIVE**

<b>GRANTOR</b>	CalSTA
<b>PURPOSE</b>	Dependable, flexible revenue to improve rail service
<b>ELIGIBLE PROJECTS</b>	Rail network improvements to existing or aspiring corridors, both capital and operating
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	\$6 million per year
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$0.8 million
<b>MATCH REQUIREMENT</b>	None
<b>SCHEDULE FOR SOLICITATION</b>	When total funding (sales tax) exceeds \$17.5 million formula level. Next Call - 2023

**TRADE CORRIDOR ENHANCEMENT PROGRAM (TCEP)**

<b>GRANTOR</b>	CTC
<b>PURPOSE</b>	For high-volume freight corridor improvements
<b>ELIGIBLE PROJECTS</b>	High volume freight corridor improvements
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: Y</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	TBD (2020 was \$1 billion)
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$37 million
<b>MATCH REQUIREMENT</b>	30 percent
<b>SCHEDULE FOR SOLICITATION</b>	Biennial Call for Projects. Next Call - 2023



**HIGH-SPEED PASSENGER TRAIN BOND PROGRAM**

<b>GRANTOR</b>	CTC
<b>PURPOSE</b>	Capital improvements to intercity rail, commuter rail, and urban rail that connect to the high-speed train system and its facilities
<b>ELIGIBLE PROJECTS</b>	<ul style="list-style-type: none"> <li>Projects on the three California intercity rail corridors that connect to the high-speed rail system.</li> <li>ROW/preconstruction cannot exceed 10 percent of total.</li> </ul>
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>Planning/environmental: N</li> <li>Design: Y</li> <li>Construction: Y</li> <li>O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	~\$48 million
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	N/A
<b>MATCH REQUIREMENT</b>	Full project cost must be accounted for by other non-state funds (local, federal, or private) but no match requirement specified.
<b>SCHEDULE FOR SOLICITATION</b>	Call for Projects once every three years.

**RAILROAD CROSSING MAINTENANCE FUND**

<b>GRANTOR</b>	California Public Utilities Commission (CPUC)
<b>PURPOSE</b>	Required maintenance to crossing automatic warning devices
<b>ELIGIBLE PROJECTS</b>	Partial reimbursement of costs for required maintenance to crossing automatic warning devices (covers local road agency's share)
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>Planning/environmental: N</li> <li>Design: N</li> <li>Construction: N</li> <li>O&amp;M: Y</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	\$3.75 million
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	Set reimbursement amount by crossing type
<b>MATCH REQUIREMENT</b>	None
<b>SCHEDULE FOR SOLICITATION</b>	Annual Call for Projects. Next Call - 2023

**INTERCITY RAIL IMPROVEMENT PROGRAM**

<b>GRANTOR</b>	CTC
<b>PURPOSE</b>	Capital improvements to intercity rail
<b>ELIGIBLE PROJECTS</b>	Transit capital projects including purchase of equipment, capital enhancement or expansion, and rolling stock
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>Planning/environmental: N</li> <li>Design: Y</li> <li>Construction: Y</li> <li>O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	~\$300,000 left to distribute
<b>MINIMUM/MAXIMUM AWARD</b>	None
<b>AVERAGE AWARD</b>	\$14 million
<b>MATCH REQUIREMENT</b>	None
<b>SCHEDULE FOR SOLICITATION</b>	Available through June 30, 2023

**CARL MOYER MEMORIAL AIR QUALITY STANDARDS ATTAINMENT PROGRAM (MOYER PROGRAM)**

<b>GRANTOR</b>	Local Air Districts
<b>PURPOSE</b>	Promote attainment of air quality standards
<b>ELIGIBLE PROJECTS</b>	Relevant project categories include locomotive and equipment Tier 4 replacement/repower projects and infrastructure projects that provide fuel/power to a covered source
<b>PHASES (Y = YES, N = NO)</b>	<ul style="list-style-type: none"> <li>• Planning/environmental: N</li> <li>• Design: Y</li> <li>• Construction: Y</li> <li>• O&amp;M: N</li> </ul>
<b>ANNUAL PROGRAM SIZE</b>	~\$75 million
<b>MINIMUM/MAXIMUM AWARD</b>	<ul style="list-style-type: none"> <li>• \$0.2 million minimum</li> <li>• Max for locomotive projects: 85 percent of total cost</li> <li>• Max for infrastructure projects: 50 percent of total cost</li> </ul>
<b>AVERAGE AWARD</b>	<ul style="list-style-type: none"> <li>• Locomotive: \$20 million</li> <li>• Infrastructure: \$13 million</li> </ul>
<b>MATCH REQUIREMENT</b>	None
<b>SCHEDULE FOR SOLICITATION</b>	Annual Call for Projects. Next Call - 2023



# Strategic Plan Appendix B

**Table B.1: SMART Tasks**

Goal: Maximize Customer Focus							
Objectives							
Improving the Customer Experience		Integrating with Destinations		Integrating with Transportation Partners		Maintaining Sustainable Fares	
<b>S</b>	Deliver a high-quality service to our customers	<b>S</b>	Assess departure/destination impacts in all business process development and decision-making	<b>S</b>	Identify service gaps/integrations needed for connections and first/last mile	<b>S</b>	Define what constitutes a sustainable fare structure between user expectations, marketplace conditions and organizational needs.
<b>M</b>	90% of customers in customer survey respond that the overall trip was of high or very high quality	<b>M</b>	Increase the number of departure/destination partnerships	<b>M</b>	Increase the number of transportation service partnerships with existing partnerships as a baseline	<b>M</b>	Measure sustainable fare value balance via periodic price acceptance studies.
<b>A</b>	Implement Board actions focusing on customer service and ways to improve the user experience	<b>A</b>	Identify and pursue customer focused pre- and post-trip destination partnerships	<b>A</b>	Develop and implement prioritized need-focused action plans to address gaps	<b>A</b>	Conduct periodic price acceptance studies to develop dynamic fare structure and trigger points for fare or service increases.
<b>R</b>	Identify revenue sources for adequately funding actions to achieve goal (equipment improvements, technology solutions, etc.)	<b>R</b>	Identify appropriate number of desired partnerships and the resources necessary for pursuing	<b>R</b>	Integrate action plans into service planning activities	<b>R</b>	Integrate studies, timing and required LOSSAN actions, if any, into Strategic Plan.
<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan .

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

**Table B.2: SMART Tasks (Cont.)**

Goal: Optimize Operations					
Objectives					
Expanding Service		Providing Better System Performance		Improving Regional Connectivity	
<b>S</b>	Increase train frequency to hourly round trips south of LA and two-hour round trips north of LA	<b>S</b>	Improve on-time performance and increase ridership and revenue	<b>S</b>	Increase regional train service to more destinations.
<b>M</b>	Schedule 18 bi-directional trains daily south of LA and nine (9) bi-directional trains daily north of LA and include increased special event trains	<b>M</b>	Measure on-time performance, ridership and revenue based on performance metrics as dictated by the interagency transfer agreement	<b>M</b>	Expand or establish service to new destinations and special events
<b>A</b>	Develop and implement an action plan for purchasing more rolling stock and hiring/training the requisite number of crew	<b>A</b>	Purchase specific LOSSAN trip planning software.	<b>A</b>	Develop and implement an action plan, schedule and defined funding source(s) for adding or expanding to top 5 area or destination.
<b>R</b>	Incorporate action plan and defined funding source(s) into Strategic Plan	<b>R</b>	Identify organizational strategies and potential trigger points for improving on-time performance and ridership	<b>R</b>	Incorporate action plan, schedule and defined funding source(s) into Strategic Plan.
<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

**Table B.3: SMART Tasks (Cont.)**

Goal: Prioritize Business Sustainability							
Objectives							
Being Fiscally Responsible		Being Environmentally Conscious		Supporting Equity and Inclusion		Being Leaders in Business Management	
<b>S</b>	Generate sufficient revenue to meet ongoing obligations, fund long-term needs, and maintain sufficient reserves to address atypical or one-off events (e.g. natural disaster/pandemic)	<b>S</b>	Reduce environmental impact	<b>S</b>	Remove unconscious barriers that preclude customers based on their race, ethnicity, gender/gender identity, sexual orientation/identity or ability/disability	<b>S</b>	Be a financial steward of public funds, providing the highest level of service, while conserving available resources
<b>M</b>	Costs measured against annual revenue and state subsidy	<b>M</b>	Minimize impact on California air, water and soil from reduced emissions	<b>M</b>	Identify and prioritize eliminating barriers based on ridership services	<b>M</b>	Increase the number of strategic partnerships with other agencies and businesses.
<b>A</b>	Develop likely revenue-requirement scenarios and measure current and projected revenue against them to identify future fiscal needs	<b>A</b>	Set organizational “stretch” goals for environmental stewardship and measurements of success	<b>A</b>	Convene a process driven by user- and non-user communities to identify barriers and solutions.	<b>A</b>	Develop phased approach for implementing business management best practices.
<b>R</b>	Incorporate process into annual workplan	<b>R</b>	Incorporate environmental stewardship requirements in all LOSSAN planning documents including equipment procurement	<b>R</b>	Assign functional-specific LOSSAN champions to develop action plans for resolving issues.	<b>R</b>	Incorporate annual review of business management processes into Strategic Plan
<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan	<b>T</b>	Establish implementation timeline as part of the annual workplan

**S** = Specific    **M** = Measurable    **A** = Achievable    **R** = Relevant    **T** = Timebound

# Glossary of Terms



## Glossary of Terms

ADA	Americans with Disabilities Act
Agency	Rail Corridor Agency
ASA	Administrative Support Agreement
Board	Board of Directors
BNSF	BNSF Railway
CalOES	California Governor’s Office of Emergency Services
CalSTA	California State Transportation Agency
Caltrans	California Department of Transportation
CCJPA	Capitol Corridor Joint Powers Authority
CHSRA	California High Speed Rail Authority
CIP	Capital Improvement Program
CP	Control Point
CPUC	California Public Utilities Commission
CRCC	Coast Rail Coordinating Council
CTSGP	California Transit Security Grant Program
DRMT	Division of Rail and Mass Transportation
FAST Act	Fixing America’s Surface Transportation Act
FY	Fiscal Year
FFY	Federal Fiscal Year
FRA	Federal Railroad Administration
GHG	Greenhouse Gas
HP	Horsepower
HSR	High-speed rail
ITA	Interagency Transfer Agreement
JPA	Joint Powers Authority/Agreement
LAUS	Los Angeles Union Station
Link US	Link Union Station
LOSSAN	Los Angeles – San Diego – San Luis Obispo
Metro	Los Angeles County Metropolitan Transportation Authority
Metrolink	Southern California Regional Rail Authority
MP	Mile Post
NCTD	North County Transit District
OBIS	On Board Information System
OCTA	Orange County Transportation Authority
OTP	On-time performance
Plan	California State Rail Plan
PTC	Positive Train Control
Prop 1B	Proposition 1B
RCTC	Riverside County Transportation Commission
ROW	Right-of-way
SANDAG	San Diego Association of Governments
SB	Senate Bill
SBCAG	Santa Barbara County Association of Governments



SCAG	Southern California Association of Governments
SCORE	Southern California Optimized Rail Expansion
SCRRA	Southern California Regional Rail Authority
SDMTS	San Diego Metropolitan Transit System
SDP	Service Development Plan
SJJPA	San Joaquin Joint Powers Authority
SLOCOG	San Luis Obispo Council of Governments
SOU	Special Operations Unit
SRA	State Rail Assistance
STIP	State Transportation Improvement Program
TAC	Technical Advisory Committee
TIRCP	Transit and Intercity Rail Capital Program
UPRR	Union Pacific Railroad
UPS	Uniform Performance Standards
TSA	Transportation Security Administration
VCTC	Ventura County Transportation Commission
VSS	Video Surveillance System