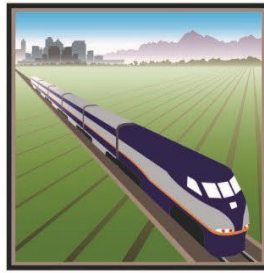


Supervisor **Vito Chiesa**, Stanislaus County
Supervisor **Leticia Gonzalez**, Madera County
Supervisor **David Haubert**, Alameda County
Supervisor **Diane Burgis**, Contra Costa County
Supervisor **Patrick Hume**, Chair, Sacramento County
Supervisor **Rodrigo Espinosa**, Vice-Chair, Merced County
Mayor **Nancy Young**, City of Tracy
Supervisor **Doug Verboon**, Vice-Chair, Kings County
Supervisor **Sal Quintero**, Fresno County
Supervisor **Amy Shuklian**, Tulare County



San Joaquin

Joint Powers Authority

Alternate **Richard O'Brien**, City of Riverbank
Alternate **Jose Rodriguez**, City of Madera
Alternate **Melissa Hernandez**, City of Dublin
Alternate **Aaron Meadows**, City of Oakley
Alternate **Bobbie Singh-Allen**, Sacramento County
Alternate **Josh Pedrozo**, Merced County
Alternate **Miguel Villapudua**, San Joaquin County

Alternate **Rey León**, City of Huron
Alternate **Eddie Valero**, Tulare County

REGULAR BOARD MEETING **Friday, September 22, 2023 – 10:00 AM**

Robert J. Cabral Station
South Hall Meeting Room
949 East Channel Street
Stockton, CA 95202

Conference Call Locations 📞

Scott Haggerty Heritage
House
4501 Pleasanton Ave.
Pleasanton, CA 94566

Madera County Government
Center
200 W. 4th Street
Suite 4100
Madera, CA 93637

Contra Costa County
District Office
3361 Walnut Boulevard
Suite 140
Brentwood, CA 94513

5018 E. Townsend Ave.
Fresno, CA 93727

8401 Laguna Palms Way
Elk Grove, CA 95758

1719 Monte Diablo Avenue
Stockton, CA 95203

Call-In Information: [**+1 \(332\)-249-0500**](tel:+13322490500) Phone Conference ID: 331 349 817#
Microsoft Teams Link: [**Click here to join the meeting**](#)

Members of the public may attend the meeting at the above address, or by dialing [+1 \(332\)-249-0500**](tel:+13322490500) with Phone Conference ID: 331 349 817# or log-in using a computer, tablet or smartphone on Microsoft Teams using link: [**Click here to join the meeting**](#)**

Persons wishing to address the Authority on any item of interest to the public regarding SJJPA and the San Joaquin Rail Service shall state their names and address and make their presentation. The Authority cannot take action on matters not on the agenda unless the action is authorized by Section 54954.2 of the Government Code. If a member of the public wishes to make a public comment:

MEMBER AGENCIES

Alameda County - Contra Costa County Transportation Authority - Fresno Council of Governments - Kings County Association of Governments - Madera County Transportation Commission
Merced County Association of Governments - Sacramento Regional Transit - San Joaquin Regional Rail Commission - Stanislaus Council of Governments - Tulare County Association of Governments

1. Submit written comments to SJJPA staff via email at publiccommentssjipa@sjipa.com, in which staff will read the comment aloud during the public comment period.
2. Complete a Request to Speak form (available at the entrance to the Board Room) and give it to the SJJPA Secretary before the Item is considered by the Board.
3. Join from the Microsoft Teams meeting link and notify SJJPA staff by alerting them via the “Raise hand” or “Chat” function; call +1 (332)-249-0500, enter Phone Conference ID: 331 349 817#, dial *5 to raise your hand when you wish to speak, and dial *6 to unmute when you are requested to speak. Please note that if participating using Microsoft Teams, all members of the public will be placed on mute until such times allow for public comments to be made.

Public comments should be limited to three (3) minutes per comment.

This Agenda shall be made available upon request in alternative formats to persons with a disability, as required by the Americans with Disabilities Act of 1990 (42 U.S.C. § 12132) and the Ralph M. Brown Act (California Government Code § 54954.2). Persons requesting a disability related modification or accommodation in order to participate in the meeting should contact San Joaquin Regional Rail Commission staff, at 209-944-6220, during regular business hours, at least twenty-four hours prior to the time of the meeting.

All proceedings before the Authority are conducted in English. Any writings or documents provided to a majority of the Authority regarding any item on this agenda will be made available for public inspection at the offices of the San Joaquin Regional Rail Commission located at 949 E. Channel Street, Stockton, California, 95202 during normal business hours or by calling (209) 944-6220. The Agenda and meeting materials are also available on the San Joaquin Joint Powers Authority Website: <http://www.sjipa.com/Home>.

1. Call to Order, Pledge of Allegiance, Roll Call

Chair Hume

2. Public Comments

Persons wishing to address the Authority on any item of interest to the public regarding SJJPA and the San Joaquins Rail Service shall state their names and address and make their presentation. The Authority cannot take action on matters not on the agenda unless the action is authorized by Section 54954.2 of the Government Code. If a member of the public wishes to make a public comment:

- 1. Submit written comments to SJJPA staff via email at publiccommentssjipa@sjipa.com, in which staff will read the comment aloud during the public comment period.*
- 2. Complete a Request to Speak form (available at the entrance to the Board Room) and give it to the SJJPA Secretary before the Item is considered by the Board.*
- 3. Join from the Microsoft Teams meeting link and notify SJJPA staff by alerting them via the “Raise hand” or “Chat” function; call +1 (332)-249-0500, enter Phone Conference ID: 331 349 817# dial *5 to raise your hand when you wish to speak, and dial *6 to unmute when you are requested to speak. Please note that if participating using Microsoft Teams, all members of the public will be placed on mute until such times allow for public comments to be made.*

Public comments should be limited to three (3) minutes per comment.

3. Consent Calendar 3.1 Approve Minutes of July 21, 2023 Board Meeting 3.2 SJJPA Operating Expense Report 3.3 Washington Update	ACTION INFORMATION INFORMATION
4. Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Allowing a Revenue Management Pilot for the San Joaquins Intercity Passenger Rail Service from November 1, 2023, through June 30, 2024, and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project Including Any and All Amendments thereto within Her Spending Authority (David Lipari)	ACTION
5. Presentation to the Board on the Draft Accessibility Compliance with U.S. Department of Transportation (USDOT) Level Boarding Regulation for the Existing and Proposed Stations (Bryan Pennino/Danielle Peña)	INFORMATION
6. San Joaquins Passenger Survey Update (David Lipari)	INFORMATION
7. Update and Discussion of Next Steps for Central Valley Region Outreach Services (Marques Cook/Tom van der List)	INFORMATION
8. Sustainable Transportation Planning Grants Awards for 2023 (Michael Hanebutt)	INFORMATION
9. Rail Safety Month Presentation (Freddy Rodriguez/Cameron Paler)	INFORMATION
10. Update on Venture Cars Deployment (Brian Schmidt)	INFORMATION
11. Board Member Comments	
12. Executive Director's Report	
13. Adjournment The next regular meeting is scheduled for: November 17, 2023	

SAN JOAQUIN JOINT POWERS AUTHORITY
Meeting of September 22, 2023

Item 3.1

ACTION

Minutes of SJJPA July 21, 2023 Board Meeting

The regular meeting of the San Joaquin Joint Powers Authority (SJJPA) was held at 9:30 am on July 21, 2023. Board Members attended this meeting via teleconference, videoconference, or in person.

1. Call to Order, Pledge of Allegiance, Roll Call

Chair Hume called the meeting to order at 9:30 am.

Director Hudson led the audience in the Pledge of Allegiance.

Board Members Present: Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair Verboon, Chair Hume

Board Members Absent: Gonzalez, Haubert, Vice Chair Espinosa

2. Public Comments

Mr. Doug Kerr of the Rail Passenger Association of California and Nevada, RailPAC, commented that for over a year, he has repeatedly criticized the Authority's decision to use vending machine food service on the new Venture Car train sets. Mr. Kerr commented that the vending machine solution will not provide any hot food or alcohol options, or seating options to passengers after purchasing food. Mr. Kerr commented that this is a distinct downgrade from the current staffed café car service and has addressed this to each board member representing constituents living in the San Joaquin Valley. Mr. Kerr inquired if the Authority is prepared to tell constituents in the San Joaquin Valley that they must accept poorer food service on their trains than what is provided on the Capitol Corridors and Pacific Surfliner trains serving higher-income areas of California and explained that this does not seem to be a winning message from an elected politician.

A call-in meeting participant commented that the second daily Sacramento train trip that the Authority intends to restore could be very useful because it would depart near the end of the work day in Sacramento and passengers could arrive near the end of transit service at night in Bakersfield, Burbank, and Los Angeles. The caller commented that in the past, train 704 arrived in Bakersfield at 9:57 pm, while the Thruway bus arrived at the Burbank airport at 11:50 pm, and Los Angeles at 12:20 am. The caller explained that the Thruway bus is there at that time for connections to the Pacific Surfliner, however the arrival time would cause riders to miss the last Westbound bus at the Burbank Airport and the last subway trip in Los Angeles. The caller urged the Authority to schedule the second Southbound train from Sacramento to arrive in Bakersfield at least 30 minutes earlier than the past schedule, because a thruway bus that arrives in Los Angeles 30 minutes earlier would make all of the final connections. The caller explained that if the Authority could not schedule train 704 to arrive 30 minutes earlier, another option would be for the Authority to speed up the train by five minutes and to formally request that LA Metro operate a final subway trip that departs

Union Station at 12:21 am. The caller explained that all passengers on a Thruway bus will therefore have enough time to catch the last Westbound bus at the Burbank Airport to make transit connections using the subway from Union Station.

Mr. John Webb from Humboldt County submitted an emailed public comment advising to keep café cars on the San Joaquins’ trains, as vending machines provide inferior level of service compared to any other train operating for similar distance anywhere in the US, and every other Amtrak train operating in the US operating a similar distance has a staffed food service car with table seating available. Mr. Webb commented that until new venture food service cars are available, café cars should be leased from Amtrak because they are operationally compatible with new venture cars and are presently in widespread use by Amtrak. Mr. Webb inquired how the Authority will defend themselves from the inevitable loss of patronage and outrage of riders and constituents when confronted with the vending machines in place of café cars.

3. Consent Calendar

3.1	Approve Minutes of May 19, 2023 Board Meeting	ACTION
3.2	SJJPA Operating Expense Report	ACTION
3.3	Washington Update	INFORMATION
3.4	Report on Status of the Natomas/Sacramento Station and Layover Track Project	INFORMATION
3.5	Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Approving On-Going Professional and Contracted Service Agreements and Professional and Contracted Service Amendments for Fiscal Year 2023/2024 as Listed Below and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Projects including Any and All Amendments thereto within Her Spending Authority	ACTION
	a) Pressley & Associates	= \$31,440

There were no comments on the Consent Calendar.

M/S/C (Hudson/Verboon) to approve Items 3.1-3.5 of the Consent Calendar. Passed and Adopted by the San Joaquin Joint Powers Authority on July 21, 2023, by the following vote to wit:

AYES: 7 Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair
Verboon, Chair Hume
NOES: 0
ABSTAIN: 0
ABSENT: 3 Gonzalez, Haubert, Vice Chair Espinosa

4. Rail Safety Presentation **INFORMATION**

Mr. Nathan Alastra introduced Ms. Peggy Ygbuhay, the Senior Director of Public Affairs for Union Pacific.

Ms. Peggy Ygbuhay gave a presentation on this item.

There were no public comments on this item.

Chair Hume thanked Ms. Ygbuhay for her presentation and commented that it is always interesting to think about rail safety from a person of the community through which the tracks pass and not just from trespasser strikes and accidents of that nature.

5. Rail Safety Month/Amtrak Safety Presentation

ACTION

Ms. Tamika Smith introduced Inspector Doug Calcagno, to present on behalf of the Amtrak Police Department.

Inspector Doug Calcagno gave a presentation on this item.

Mr. Barnbaum inquired about the number of assaults, and explained that when they peaked in April of the prior year could have been related to the month that the Federal Judge came down with the ruling to change the masking requirements to eliminate the mask mandate. Mr. Barnbaum inquired about the possibility of a decrease in the number of assaults due to changes in the federal policy.

Chair Hume explained that Inspector Calcagno mentioned that the implementation of mask rules increased incidents, thus there is a high likelihood that the correlation of a reduction in incidents was related to the loosening of the mask standards.

Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Authorizing the Executive Director to Submit and Execute Any and All Grant Applications, Agreements, Certifications, and Assurances and Any Other Documents Necessary to the California State Transportation Agency to obtain State Rail Assistance (SRA) Funding in the Amount of \$250,000 for the Union City Intermodal Station Phase 3 Project

Mr. Dan Leavitt gave a presentation on this item.

Mr. Barnbaum commented that he has regularly attended the San Joaquin Regional Rail Commission (Rail Commission) Board meetings over the last year due to Valley Rail approaching. Mr. Barnbaum explained that it was interesting to see the map of how Valley Rail would look like with service to Union City and how similar the renderings of the station are in current service with that of the Richmond Intermodal Station, where the San Joaquins and Capitol Corridors connect to BART. Mr. Barnbaum explained that there is a proposed roundtrip on Valley Rail as far North as Chico to the Union City Intermodal Station in the future. Mr. Barnbaum explained that the Rail Commission voted unanimously on the exact same item and recommended that the Authority also provide a unanimous vote on this item. Mr. Barnbaum commented that he will continue to attend the Rail Commission meetings and advocate for much-needed Sacramento County-wise voting and non-voting representation for an extended-Rail Commission similar to the current model in place today for the Greater San Joaquin County representation.

Chair Hume agreed that any effort to expand the footprint and increase transportation mobility throughout the region and Northern California is a good thing.

M/S/C (Chiesa/Quintero) to Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Authorizing the Executive Director to Submit and Execute Any and All Grant Applications, Agreements, Certifications, and Assurances and Any Other Documents Necessary to the California State Transportation Agency to obtain State Rail Assistance (SRA) Funding in the Amount of \$250,000 for the Union City Intermodal Station Phase 3 Project

Passed and Adopted by the San Joaquin Joint Powers Authority on July 21, 2023, by the following vote to wit:

AYES: 7 Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair
Verboon, Chair Hume
NOES: 0
ABSTAIN: 0
ABSENT: 3 Gonzalez, Haubert, Vice Chair Espinosa

6. **Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority to Allow Passengers to Purchase Bus-Only Tickets on Route 7 (Martinez-Santa Rosa-Arcata) for All Bus Stop Pairs and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority**

ACTION

Mr. Michael Hanebutt gave a presentation on this item.

Mr. Kerr commented in favor of this resolution, stating that he often refers to the North Coast of California as the forgotten part of the state because it has much lower population density than places from the Bay Area and south. Mr. Kerr commented that public transportation in this area is very limited, so this will be a big improvement and hopes the board will approve this resolution.

Director Chiesa commented in agreement with Mr. Kerr’s comments, and stated that it comes back to the nimbleness of why the SJJPA was created, to change routes and find what does and does not work, and not be afraid to fail. Director Chiesa commented that this item will provide decent service in an underserved area and will move the motion.

Chair Hume concurred with Director Chiesa’s comments and thinks that anything that gets closer to a 1-ticket ride throughout the state is a good thing.

M/S/C (Chiesa/Hume) to Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority to Allow Passengers to Purchase Bus-Only Tickets on Route 7 (Martinez-Santa Rosa-Arcata) for All Bus Stop Pairs and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority

Passed and Adopted by the San Joaquin Joint Powers Authority on July 21, 2023, by the following vote to wit:

AYES: 7 Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair
Verboon, Chair Hume
NOES: 0
ABSTAIN: 0
ABSENT: 3 Gonzalez, Haubert, Vice Chair Espinosa

7. **Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Approving an Agreement with Modern Times, Inc. for Southern California Region Outreach Services for an Amount Not-To-Exceed \$1,000,000 and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority**

ACTION

Mr. Marques Cook and Ms. Autumn Gowan gave a presentation on this item.

A call-in meeting participant commented in reference to the comments made earlier under general public comments, that the scheduling of the second Southbound trip from Sacramento that is anticipated to be restored would be great to have as the scope of work for the marketing analysis and marketing outreach to potential riders in Southern California because the timing of the trip from Sacramento to Burbank in Los Angeles would be useful and generate a lot of ridership. The caller urged that the presenters to look at the timing as suggested in the earlier comments so a Thruway bus service would be able to connect with the last buses and subways in Los Angeles.

Chair Hume commented that the comments from the caller are appropriate since the service will be advertised to this market, and it is a strong selling point to say that the service will get potential passengers into that market in time to make connections to get them to their last stop. Chair Hume explained that if this was a reality, it would go a long way to improving the ridership in that area.

Director Hudson commented that the city of San Ramon came up with a pilot program called Go San Ramon to address the problem of transit authorities not being able to make the hours and the connections at the time that passengers want and that he hopes Los Angeles can look into a similar solution. Director Hudson explained that program will reimburse for half of the cost of an Uber if it's after hours. Director Hudson explained that it has

worked well, and is a lot better option than changing times on the different transit authorities as it might not be easy to do as it is in this Authority.

M/S/C (Hudson/Quintero) to Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Approving an Agreement with Modern Times, Inc. for Southern California Region Outreach Services for an Amount Not-To-Exceed \$1,000,000 and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority

Passed by the San Joaquin Joint Powers Authority on July 21, 2023, by the following vote to wit:

AYES: 7 Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair
Verboon, Chair Hume
NOES: 0
ABSTAIN: 0
ABSENT: 3 Gonzalez, Haubert, Vice Chair Espinosa

8. **Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Approving an Agreement with DB E.C.O. North America Inc. for On-Call Planning Consulting Services for an Amount Not-To-Exceed \$600,000 and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority**
- ACTION

Mr. David Lipari and Ms. Autumn Gowan gave a presentation on this item.

There were no comments on this item.

M/S/C (Young/Hudson) to Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Approving an Agreement with DB E.C.O. North America Inc. for On-Call Planning Consulting Services for an Amount Not-To-Exceed \$600,000 and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project including Any and All Amendments thereto within Her Spending Authority

Passed by the San Joaquin Joint Powers Authority on July 21, 2023, by the following vote to wit:

AYES: 7 Chiesa, Hudson, Quintero, Shuklian, Young, Vice Chair
Verboon, Chair Hume
NOES: 0
ABSTAIN: 0
ABSENT: 3 Gonzalez, Haubert, Vice Chair Espinosa

9. Presentation on San Joaquins On-Time Performance (OTP)

ACTION

Mr. Nathan Alastra gave a presentation on this item.

Mr. Barnbaum commented about a hill collapse in San Clemente which resulted in debris all over the tracks that caused major service disruptions and delays primarily between Oceanside and Irvine. Mr. Barnbaum explained that there was a significant reduction of the number of round trips between Los Angeles and San Diego. Mr. Barnbaum explained that from personal experience from these impacts and due to the San Joaquins not having partnerships in place with Megabus, Greyhound, or FlixBus, a separate bus ticket needed to be purchased to avoid major delays before resuming Amtrak travel on a different route. Mr. Barnbaum urged the Authority to look into partnerships with bus companies to get people around the disruption, where their Amtrak tickets are honored when there are instances of major delays or service disruptions. Mr. Barnbaum explained that this will allow Amtrak to avoid refunding tickets and honoring difference in prices, and to avoid passengers purchasing tickets from private carriers.

10. Thruway Bus Route 3 (Stockton-Sacramento-Chico-Redding) Partnership INFORMATION

Mr. Michael Hanebutt gave a presentation on this item.

Mr. Barnbaum inquired if the changes, as recommended in this item would include an airport stop on the Thruway bus service until the next phase with the train service comes along.

Mr. Sean Tiedgen, Executive Director of the Shasta Regional Transportation Agency (SRTA) commented in support of staff's recommendation to continue working with the Redding Area Bus Authority (RABA) on a phased approach to implement express bus service first between Redding and Chico and then eventually along the Highway I-5 corridor. Mr. Tiedgen commented that SRTA has been trying for several years to make progress on a zero-emission intercity bus service along the I-5 corridor to address state and regional goals as well as state transportation needs. Mr. Tiedgen explained that RABA's Downtown Transit Center serves as a regional hub in the North State for intercity transit, connecting Eureka, and the counties of Trinity, Siskiyou, Modoc, Lassen, and Tehama. Mr. Tiedgen explained that SRTA previously looked at providing intercity bus service solely through electric buses, however initial third-party analysis showed that the vehicles could not meet their long-term operational needs while also meeting the services goals. Mr. Tiedgen explained that SRTA is looking to focus the service on hydrogen fuel cell-powered buses in the future and they recently received \$9 million dollars in funding to support the design, development, and installation of a hydrogen station to support intercity and regional public transportation by 2028. Mr. Tiedgen stated that SRTA continues to look at available opportunities, working with RABA and SJJPA staff and looks forward to the future of this effort.

Mr. John Andoh, Transit General Manager of the Redding Area Bus Authority (RABA) stated that RABA is interested in working with the SJJPA to bring the express bus to fruition, and the RABA Board of Directors will be discussing this idea at their upcoming August meeting. Mr. Andoh commented that RABA is looking forward to serving San Joaquins passengers, furthering the connection to the North State, and working with SRTA.

Chair Hume thanked Mr. Ando for providing those comments.

11. Recap of 2023 Allensworth Juneteenth Celebration

INFORMATION

Ms. Carmen Setness gave a presentation on this item.

Chair Hume thanked Ms. Setness for the wonderful presentation and commented that he hopes to make it to the celebration in one of the coming years.

Director Shuklian thanked staff for the efforts for this event, and explained that Allensworth is the reason why Tulare County is part of the SJJPA because that is the small section that the San Joaquins travels through Tulare County. Director Shuklian commented that it is great that this event is offered and that she appreciates all of the work that goes into it.

Director Young commented that this event was held the same day that the City of Tracy has their Juneteenth celebration, and hopefully next year it won't be held on the same day so she would have the opportunity to attend. Director Young inquired about the rededication event happening in October and asked for the information as soon as possible in order to get the event on her calendar so she can be a part of that.

Ms. Setness commented that she will send the information to Director Young.

Chair Hume inquired if Ms. Setness could send the information to the entire board so they can plan accordingly.

12. Board Member Comments

Director Hudson explained that at future SJJPA Board meetings, Alternate Burgis will be the representative for Contra Costa County to avoid him driving during rehabilitation. Director Hudson thanked the board and staff for the time he had on the SJJPA Board.

Chair Hume thanked Director Hudson and wished him a full and speedy recovery, and is looking forward to having Alternate Burgis join the SJJPA board regularly. Chair Hume wished Director Hudson all the best and great health.

Chair Hume apologized for not being available to attend the meeting in person, and explained that he will be providing his first-ever State of the County Address following this meeting and was unable to make the trip to Stockton.

Director Chiesa thanked Director Hudson for his service, and commented that he has been such a wonderful director and was always completely engaged, and wished him a speedy recovery.

13. Executive Director's Report

Ms. Mortensen echoed the sentiments to Director Hudson for a speedy recovery and for his service on the SJJPA board. Ms. Mortensen thanked Ms. Autumn Gowan and Mr. Laurence Farrell who put together an Industry Day event with Les Fong and the Small Business Development Center in Stockton due to the activity with the Valley Rail Program and the growth with 19 new stations and over 100 new track miles that require a lot of construction work. Ms. Mortensen explained that there will be a whole section of the event with all of the upcoming projects in the next four years, most of which are starting this summer and fall and beginning next year, and the purpose of this event will pair up small businesses with the prime contractors as they invest in the community. Ms. Mortensen explained that this event will be held on September 14th and offered to provide the detailed flyer to the board members. Ms. Mortensen explained that there will also be a more detailed Stockton Diamond Industry Day on two separate occasions because that project estimate is currently at \$235 million dollars. Ms. Mortensen reported that the state funding situation this year is more restrictive than anticipated paired with the slide in the LOSSAN corridor mentioned by Mr. Barnbaum, is putting the Authority over the State Legislative cap for intercity rail funding. Ms. Mortensen explained that staff is working with Caltrans on funding, and this may impact the implementation of the 7th train. Ms. Mortensen explained that the 7th train is also impacted because Amtrak does not have enough P&E crews to run the train reliably if there is an incident. Ms. Mortensen explained that the target is January for Amtrak however depending on negotiations with the state, there may not be enough funding to add that. Ms. Mortensen reported that there will be a passenger survey report at the September meeting, of a survey that was done for both ACE and the San Joaquins to get a good idea of who is traveling and why, what amenities are wanted, and what amenities they are willing to trade off to have more accessible service or cheaper fares. Ms. Mortensen explained that these results are important in terms of the earlier comments on where food service stacks up in the survey.

Director Young requested a copy of the Industry Day flyer.

14. Adjournment

Chair Hume adjourned the meeting at 10:50 am.

The next regular meeting is scheduled for:
September 22, 2023 – TBD

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 3.2

INFORMATION

SJJPA Operating Expense Report

Please see the attached San Joaquin Joint Powers Authority (SJJPA) Operating Expense Report for the following period:

- Fiscal Year Start 2022/23 (July 1, 2022 – June 30, 2023)
- Fiscal Year Start 2023/24 (July 1, 2023 – July 31, 2023)

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.

San Joaquin Joint Powers Authority
Operating Expense Report
June 2023
100% of Budget Year Elapsed

OPERATING EXPENSES	SJJPA FY 22-23 ALLOCATION	EXPENSE TO DATE	YTD PERCENT EXPENDED
Administrative Expenses			
Salaries/Benefits/Contract Help	2,228,527	2,228,527	100%
Office Expense	6,821	6,821	100%
Subscriptions/Periodicals/Memberships	7,130	7,130	100%
Office Equipment Lease	15,739	15,739	100%
Computer Systems	-	-	0%
Communications	11,129	11,129	100%
Motor Pool	9,967	9,967	100%
Transportation/Travel	6,162	6,162	100%
Training	462	462	100%
Audits Regulatory Reporting	24,132	24,132	100%
Professional Services Legislative	208,937	208,937	100%
Professional Services Legal	223,223	223,223	100%
Professional Services General	486,849	486,849	100%
Professional Services Grants	67,000	67,000	100%
Publications/Legal Notices	870	870	100%
Professional Services Operations	1,428	1,428	100%
Communications, Operations	12,357	12,357	100%
Maintenance of Headquarters Structures/Grounds	99,721	99,721	100%
Insurance	84,385	84,385	100%
Insurance Management Fees	5,063	5,063	100%
Security Services/Safety Program	59,585	59,585	100%
Administrative Expenses Subtotal	3,559,487	3,559,487	100%
Marketing Expense			
Marketing & Outreach	2,050,000	2,091,619	102%
Marketing Expenses Subtotal	2,050,000	2,091,619	102%
Contract Expense			
San Joaquin Intercity Rail Operations (All Contracts)	75,625,858	58,930,510	78%
Contract Expense Subtotal	75,625,858	58,930,510	78%
TOTAL OPERATING EXPENSES	81,235,345	64,581,616	79%

[1] The 2022/23 Fiscal Year End Budget to Actuals reflects an immaterial amount over budget in Marketing and Outreach due to increased efforts to regain ridership over the summer 2023 season. The over budget amount for marketing and outreach totaled \$41,619 and was funded through unspent funds from the 2021/22 Fiscal Year.

San Joaquin Joint Powers Authority
Operating Expense Report
July 2023
8% of Budget Year Elapsed

OPERATING EXPENSES	SJJPA FY 23/24 ALLOCATION	EXPENSE TO DATE	YTD PERCENT EXPENDED
Administrative Expenses			
Salaries/Benefits/Contract Help	2,455,054	189,804	8%
Office Expense	18,596	266	1%
Subscriptions/Periodicals/Memberships	5,000	-	0%
Office Equipment Lease	23,390	736	3%
Computer Systems	5,000	-	0%
Communications	31,787	963	3%
Motor Pool	32,667	572	2%
Transportation/Travel	15,000	1,231	8%
Training	5,145	270	5%
Audits Regulatory Reporting	40,750	-	0%
Professional Services Legislative	253,000	17,292	7%
Professional Services Legal	80,000	378	0%
Professional Services General	362,685	36,488	10%
Professional Services Grants	67,000	-	0%
Publications/Legal Notices	10,000	-	0%
Professional Services Operations	-	-	0%
Communications, Operations	12,084	18	0%
Maintenance of Headquarters Structures/Grounds	118,210	10,040	8%
Insurance	140,000	7,164	5%
Insurance Management Fees	7,500	-	0%
Security Services/Safety Program	90,188	4,463	5%
Administrative Expenses Subtotal	3,773,056	269,685	7%
Marketing Expense			
Marketing & Outreach	1,750,000	92,676	5%
Marketing Expenses Subtotal	1,750,000	92,676	5%
Contract Expense			
San Joaquin Intercity Rail Operations (All Contracts)	74,986,356	4,873,807	6%
Contract Expense Subtotal	74,986,356	4,873,807	6%
TOTAL OPERATING EXPENSES	80,509,412	5,236,168	7%

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 3.3

INFORMATION

Washington Update

Please see attached Washington Update Report provided for the month of September 2023.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.



TAI GINSBERG & ASSOCIATES, LLC

TO: San Joaquin Joint Powers Authority (SJIPA)
FROM: TG&A Staff
SUBJECT: Monthly Progress Report for SEPTEMBER 2023
DATE: September 13, 2023

THE BIDEN ADMINISTRATION/EXECUTIVE BRANCH

September 1, 2023. The Biden Administration is seeking an additional \$4 billion to the [initial \\$40 billion supplemental request](#). The additional \$4 billion would be for natural disaster relief funding added to the \$12 billion the White House initially sought for FEMA, bringing the total to \$16 billion. Biden is seeking about \$44 billion in total supplemental funding. The White House also submitted a list of requests for the looming Continuing Resolution that lawmakers will need to consider to avoid a partial government shutdown. The White House wants to attach the supplemental request to the CR, which is expected to run into early December 2023. See here for [FY 2024 Continuing Resolution \(CR\) Appropriations Issues](#)."

BIDEN 2023 TRANSPORTATION-RELATED NOMINATIONS/CONFIRMATIONS

Since the August 2023 report, following are no relevant changes in status (in **RED TYPE**) to transportation-related nominees. **A full 2022/2023 listing of "Nominations" is available from TG&A upon request.**

APPROPRIATIONS/BUDGET

FY 2024 APPROPRIATIONS UPDATE/PROCESS

The Senate and House have both returned from their August Recess, and there are only two weeks-plus left in the current federal fiscal year - September 30, when federal funding expires. Both chambers have nearly a full slate of FY 2024 appropriation bills to get passed through their respective chambers (the House has passed one bill -

OVERALL FY 2024 APPROPRIATION BILL SUMMARY		
	Bills Passed:	House (1 of 12)
		Senate (0 of 12)
	Bills Vetoed:	(0 of 12)
	Both Chambers Passed:	(0 of 12)
	Bills Enacted:	(0 of 12)

Military Construction/Veterans Affairs bill on 7/27/23). [*While the Senate Appropriations Committee has approved all 12 annual appropriations bill, none of those bills has advanced through the full Senate.*]

However, the Senate is poised to take floor action on a three-bill package the week of September 11, 2023. The "minibus" is comprised of the Agriculture ([S 2131](#)), Veterans Affairs ([S 2127](#)) and Transportation and Housing/Urban Development (THUD – [S 2437](#)) appropriation bills; funding for all three bills would fall within the budget caps established by the [Fiscal Responsibility Act](#) negotiated along with the raising the debt ceiling earlier this year. [*See Senate Majority Leader Chuck Schumer statement [here](#) and [here](#) on Senate floor consideration of three bipartisan appropriation bills.*] The Senate bill allocates overall higher levels of transportation funding than the House proposed bill. A Congressional Research Service (CRS) report on [Transportation, Housing and Urban Development, and Related Agencies \(THUD\) Appropriations 2024](#) details the differences in those funding levels: (next page)

- July 20th, the **Senate Appropriations Committee** reported its FY 2024 THUD appropriations bill proposing **\$167.5 billion in total regular funding**—including \$88.1 billion in regular discretionary budget authority—as well as \$10.8 billion in emergency funding; and on
- July 24th, the **House Appropriations Committee** reported its FY 2024 THUD appropriations bill proposing **\$144.6 billion in total funding**—\$65.2 billion in discretionary funding—for THUD in FY2024

Table 2. THUD Appropriations by Bill Title, FY2023-FY2024
(dollars in millions)

	FY2023 Enacted	FY2024 Request	FY2024 House Comm.	FY2024 Senate Comm.	FY2024 Enacted
Title I: DOT	106,349 ^a	107,252	100,915	107,366 ^b	
Discretionary	28,735 ^a	27,850	21,574	27,964 ^b	
Mandatory	77,614	79,402	79,342	79,402	
Title II: HUD	58,178 ^c	70,573	68,217	70,060 ^d	
Title III: Related Agencies	420	453	452	438	
Title IV: General Provisions		0	-25,035	0	
Total	164,946^d	178,278	144,550	167,493^e	
Total Discretionary	87,332^d	98,876	65,208	88,091^e	
Total Mandatory	77,614	79,402	79,342	79,402	
Emergency Appropriations	9,640 ^f	0	0	10,840 ^g	
Additional (Advance) Appropriations (DOT)	36,811	36,811	36,811	36,811	

Meanwhile, the House has several appropriation bills before the Rules Committee. Votes bringing several of those bills to the floor could happen the week of September 11, but as noted above the non-defense appropriation bills would cut spending below the caps set in the Fiscal Responsibility Act. Democrats are opposed to these cuts. Regardless, it is almost certain that a short-term Continuing Resolution (CR) will need to be enacted to likely run until late fall/early December to avert a government shutdown; however, the odds of a temporary shutdown are not zero. Both Senate Majority Leader Chuck Schumer and House Speaker Kevin McCarthy have expressed support for adopting a CR to provide ample time for negotiations and agreement on a final appropriations package; although, they differ on the length of time for a CR. In the background, the House Freedom Caucus is threatening a government shutdown unless a list of demands on conservative policy issues are met, e.g., no “blank check” for Ukraine, control over illegal migrants and lower overall spending levels than those negotiated in the Fiscal Responsibility Act. Complicating matters is the Biden Administration supplemental spending request of \$44 billion for disaster relief and Ukraine aid. And, further complicating matters is a provision in the **Fiscal Responsibility Act of 2023** which suspended the debt limit through January 1, 2025. To incentivize timely enactment of federal spending bills, the Public Law contains a mechanism that will reduce FY 2024 funding below current FY 2023 funding by one percent if Congress fails to enact all 12 appropriations bills by January 1, 2024. If such a provision were enacted, it would cut overall transportation funding (most funds in the IIJA should be unharmed). See the Committee on Responsible Federal Budget report on **[“Q&A: Everything You Should Know About Government Shutdowns.”](#)**

OTHER UPCOMING CONGRESSIONAL FISCAL POLICY DEADLINES

- [Disaster Relief Fund exhaustion Possible late August 2023](#)** - The FEMA Disaster Relief Fund is expected to run out of money by late August. A bill introduced in the Senate would appropriate \$11.5 billion to replenish the fund. The White House released a **[supplemental appropriations request](#)** that included \$12 billion for the fund;
- [Funding the Government / Appropriations September 30, 2023](#)** - Congress enacted a **[FY 2023 omnibus](#)** in late December that funds the government through the end of the fiscal year. Discretionary spending for FY 2024 and FY 2025 will be subject to statutory caps enacted in the Fiscal Responsibility Act. **[Q&A: Everything You Should Know About Government Shutdowns](#)**;
- [Continuing Resolution Penalty January 1, 2024](#)** - The **[Fiscal Responsibility Act](#)** includes a penalty for the use of a continuing resolution (CR) in FY 2024, reducing both defense and nondefense funding levels by 1 percent if appropriations bills are not enacted by January, which would take effect through a sequestration order to be issued by April 30, 2024. (A similar penalty and timeline also apply for FY 2025.);
- [Longer-Term Deadlines - FY 2028](#)** - **[Highway Trust Fund insolvency](#)**;

- **Longer-Term Deadlines- Statutory PAYGO December 2024 or January 2025** - Statutory pay-as-you-go (PAYGO) rules provide for an across-the-board sequester of non-exempt mandatory spending programs if lawmakers enact net deficit-increasing legislation over the course of the year. A provision in the FY 2023 omnibus shifted the sequestration totals from the 2023 and 2024 scorecards and added them to the 2025 scorecard. Statutory PAYGO requires the Office of Management and Budget (OMB) to issue a sequestration order within 15 days of the end of a congressional session.

US Department of Transportation (THUD) Appropriation Status Table FY 2024										
Transportation-HUD	Subcommittee Approval		Full Committee Approval		Initial Passage		Resolution of House-Senate Differences			Presidential Approval
	House	Senate	House	Senate	House	Senate	Conference Rpt.	House	Senate	
	HR 4820 (voice vote) 7/12/2023		HR 4820 (34-27) 7/18/2023	S 2437 (29-0) 7/20/2023						
HR 4820										
H Rpt. 118-154										
S 2437										
S Rpt. 118-70										
Notes:										
House Committee on Appropriations - 7/18/2023 Full Committee THUD Press Release										
Senate Committee on Appropriations - 7/20/2023 Full Committee THUD Press Release										

September 13, 2023. The US Department of Treasury issued its [Monthly Treasury Statement Receipts and Outlays of the United States Government For FY 2023 Through August 31, 2023](#). The government scored a **\$89 billion surplus in the month of August 2023** with **total August receipts reaching \$283 billion** against **August outlays of \$194 billion**. **The FY 2023 cumulative deficit for the eleven-month period ending in August 2023 is \$1.524 trillion.**

SELECTED CONGRESSIONAL HEARINGS/BUSINESS

September 22, 2023. The House Committee on Energy and Commerce, Subcommittee on Environment, Manufacturing, and Critical Materials, is scheduled to hold a field hearing (in East Palestine, Ohio) to discuss and receive testimony on matters pertaining to “Life After the Train Derailment: Ensuring Transparency and Accountability for the People of East Palestine.” [Committee Link and Testimony](#).

September 13, 2023. The Senate Committee on Environment and Public Works held a full committee hearing to discuss and receive testimony on matters pertaining to, “[Examining the Effects of Extreme Heat and Weather on Transportation](#).” [Committee Link and Testimony](#).

September 13, 2023. The House Committee on Transportation and Infrastructure, Subcommittee on Highways and Transit held a hearing to discuss and receive testimony on matters pertaining to, “[The Future of Automated Commercial Motor Vehicles: Impacts on Society, the Supply Chain, and U.S. Economic Leadership](#).” [Committee Link and Testimony](#). **TG&A Summary Available Upon Request.**

RAIL SAFETY BILL SUMMARY

[Update: The Railway Safety Act of 2023 (S 576) introduced in response to the February 3, 2023, Norfolk Southern train derailment in East Palestine, Ohio, and sponsored by Senators Sherrod Brown (D-OH) and J.D. Vance (R-OH), has remained stalled. However, Senator Vance recently told reporters that Senate Democratic leaders have told him that a vote will be held this fall. Senator Vance does not expect the vote in September due to Congress’s focus on appropriations. In the House, Congressman Chris Deluzio (D-PA) [held a press conference in Darlington Township](#) (September 8) calling for congressional leadership to act on rail safety legislation upon Congress’s return to Washington. Congressman Deluzio also announced that the Railway Safety Act (HR 1674), which he introduced with Rep. Nick LaLota (R-NY), has significant bipartisan momentum, including nine Republican co-sponsors, from different wings of the conference. The House bill would institute requirements for wayside defect detectors, increase fines for wrongdoing committed by rail carriers, enhance safety procedures for trains carrying hazardous materials, establish a permanent requirement for railroads to operate with at least two-person crews.

Some Republicans want to wait until the National Transportation Board completes its investigation before acting on any new regulations or reforms.]

- The Senate Commerce Committee passed (16 to 11) the bipartisan Railway Safety Act of 2023 ([S 576](#)) on May 10, sending it to the full Senate. The legislation was introduced by Ohio and Pennsylvania Senators Sherrod Brown, J.D. Vance, Bob Casey, and John Fetterman following the East Palestine, Ohio, derailment. A summary of its key provisions can be found [here](#).
- Meanwhile, in the House Congressman Chris Deluzio introduced a companion bill (The Railway Safety Act of 2023 - [HR 1674](#)). Another rail safety bill in the House, Reducing Accidents in Locomotives (HR 1633 - RAIL) Act, has bipartisan support from Ohio members of the House and is sponsored by Congressman Bill Johnson, whose district includes East Palestine.

SENATE			
Railway Safety Act of 2023	S 576	3/1/2023	Sen. Sherrod Brown (D-OH)
Assistance for Local Heroes During Train Crises Act	S 844	3/16/2023	Sen. Robert Casey, Jr. (D-PA)
Railway Accountability Act	S 1044	3/29/2023	Sen. John Fetterman (D-PA)
HOUSE			
Decreasing Emergency Railroad Accident Instances Locally Act or the DERAILED Act	HR 1238	2/28/2023	Rep. Christopher Deluzio (D-PA)
Reducing Accidents in Locomotives Act or the RAIL Act	HR 1633	3/17/2023	Rep. Bill Johnson (R-OH)
Railway Safety Act of 2023 (companion to S 576)	HR 1674	3/21/2023	Rep. Christopher Deluzio (D-PA)
Rail Inspector Safety Act (amendment to FAA Reauth.)	HR TBA	6/12/2023	Rep. Derrick Van Orden (R-WI)

SELECTED CONGRESSIONAL “TRANSPORTATION-RELATED” BILLS – SEPTEMBER

SENATE BILLS - SEPTEMBER	
S TBA Press Release	T. Kaine (D-VA) “End Shutdown Act.” The bill would initiate an automatic Continuing Resolution (CR) on October 1, if an appropriations bill is not passed by that date. It would stop the Senate from moving forward with any legislation, outside of an emergency scenario, until Congress reached an agreement on a long-term spending deal. Introduced 9/6/23.
HOUSE BILLS – SEPTEMBER (No Relevant Items)	

FEDERAL REGISTER NOTICES OF FUNDING OPPORTUNITY (NOFOs)/GRANT AWARDS

See **Addendum A. - Calendar Year NOFO/AWARDS SCORECARD – at end of report.**

Selected/Anticipated Transportation-Related NOFO Announcement Dates in 2023

(As of August 15, 2023 - [Hyperlink](#) and US DOT Grants Dashboard [here](#))

See [White House](#) Document on [Open/Upcoming NOFOs](#)

See US DOT Federal Transportation Funding: FY 2023 Disc. Grant Preparation Checklist for Prospective Applicants [here](#), & Federal Railroad Administration Calendar of Upcoming Awards/NOFOs calendar [here](#).

Month Est.	Notice of Funding Opportunity (NOFO)	Operating/Admin. Office
Summer 2023	Thriving Communities – NOFO 9/12/23.	FHWA/Office of the Secretary
TBA 2023	All Stations Accessibility Program	FTA
Summer 2023	Railroad Crossing Elimination Grant Program	FRA
Fall 2023	Consolidated Rail Infrastructure and Safety Improvements (CRISI) Program	FRA
Fall 2023	Transportation Access Pilot Program	FHWA
Fall 2023	Building Resilient Infrastructure and Communities Program	DHS/FEMA
Winter 2023	Innovative Coordinated Access and Mobility Program	FTA

UPCOMING NOFO(s) in SEPTEMBER:

- **August** - FRA is expected to announce the availability of \$104 million through the [FY22-23 Restoration and Enhancement Grant Program](#), funding operating assistance grants for initiating, restoring, or enhancing intercity passenger rail transportation. Later in August, FRA will host a webinar to provide a program overview for potential grantees.

September 12, 2023. The US DOT [announced](#)/released a Notice of Funding Opportunity (NOFO) for up to \$22 million in grants to provide technical assistance and a [Call for Letters of Interest](#) (LOI) from communities seeking support through the [Thriving Communities Program](#). The Thriving Communities Program (TCP) provides intensive technical assistance to under-resourced and disadvantaged communities to help them identify, develop, and deliver transportation and community revitalization opportunities. Under the \$22 million NOFO, USDOT is accepting applications for both the Thriving Communities National [Capacity Builder Program](#) and a new [Regional Pilot Program](#) to fund State and Regional TCP activities. **LOIs must be submitted via webform by 4:59 p.m. ET on November 15, 2023.**

OTHER TRANSPORTATION-RELATED FEDERAL REGISTER NOTICES

September 11, 2023. The Federal Railroad Administration (FRA) issued [Safety Bulletin 2023-06](#) regarding a switching accident that resulted in the amputation of a crew member's leg on September 1, 2023. FRA's investigation into this accident is ongoing, however, FRA reminds railroads of the importance of ensuring switching operations are conducted safely.

September 11, 2023. The Federal Railroad Administration (FRA) issued [Notice of Safety Advisory](#) (and [here](#)) that recommends railroads utilize Wheel Impact Load Detectors (WILD) to properly identify and replace high-impact railcar wheels that could cause significant damage to rails and supporting track structures. FRA's preliminary investigation of a recent train derailment in Gothenburg, Nebraska, indicates that high-impact wheels damaged the rail the train was operating over and caused the derailment. Current industry practices for using WILDs to identify and replace high-impact wheels could help prevent such incidents in the future.

September 7, 2023. The [Surface Transportation Board](#) (STB) issued a [Notice of Proposed Rulemaking and Closure](#) proposing , a new set of regulations that would provide for the prescription of reciprocal switching agreements to address inadequate rail service, as determined using objective standards based on a carrier's original estimated time of arrival, transit time, and first-mile and last-mile service. The proposed new rule sets specific, objective, and measurable criteria for when prescription of a reciprocal switching agreement will be warranted. To help implement the new regulations, the Board proposes (1) to require Class I carriers to submit certain data, which would be publicly accessible and generalized; and (2) to adopt a new requirement that, upon written request by a customer, a rail carrier must provide to that customer individualized, machine-readable service data. Proposed backers of the rule intimate that the rule will increase competition; while, the railroad industry argues that the rule will undercut the railroads' business and will increase congestion. See article [here](#) and [here](#). **Comments are due by October 23, 2023. Replies are due by November 21, 2023.**

September 5, 2023. The Surface Transportation Board (STB) issued a [Notice of Decision](#) announcing the 2022 revenue adequacy determinations for the nation's Class I railroads. Five Class I railroads (BNSF Railway Company, CSX Transportation, Inc., Norfolk Southern Combined Railroad Subsidiaries, Soo Line Corporation, and Union Pacific Railroad Company) were found to be revenue adequate. The designation generally means those railroads achieved a rate of return equal to or greater than the board's calculation of the average cost of capital for the freight-rail industry. The STB determined that those railroads achieved a rate of return on net investment (ROI) equal to or greater than the agency's calculation of the average cost of capital for the freight rail industry, which for 2022 is 10.58 percent. The 2022 ROIs are: BNSF at 12.89 percent, CSX at 16.17 percent, Norfolk Southern at 14.55 percent, Soo Line (the US affiliate of Canadian Pacific) at 13.31 percent and Union Pacific at 17.96 percent. **The decision is effective on September 5, 2023.**

GOVERNMENT NOTICES/REPORTS/NEWS ARTICLES

September 1, 2023. Amtrak's Office of Inspector General (OIG) issued a report entitled, "[Financial Management: The Company Has Proactively Taken Steps to Comply with the Infrastructure Investment and Jobs Act](#)." The Infrastructure Investment and Jobs Act (IIJA) provides \$66 billion for passenger and freight rail improvements—the largest investment in rail in generations.

Of this, IJA provides \$22 billion exclusively to Amtrak to bring its capital assets into a state of good repair and acquire new trainsets, among other uses. The objective of the review is to assess Amtrak's early efforts to comply with all IJA's requirements, with a focus on its ability to use, account for, and report on the \$22 billion in direct funding.

UPCOMING CONGRESSIONAL CALENDAR – OCTOBER

October						
Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.
1	2	3	4	5	6	7
8	9 Columbus Day	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

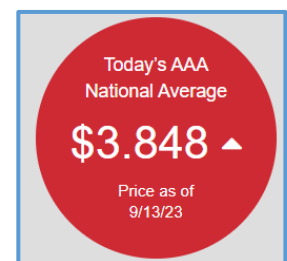
- Both chambers in session
- Senate only in session
- House only in session

UPCOMING DEADLINES/EVENTS

- September 10-13 [ARTBA 2023 National Convention](#) (La Jolla, CA);
- September 17-21 [AASHTO Committee on Construction](#) (Kansas City, MO);
- September 18-20 [Commuter Rail Coalition Rail Summit](#) (Chicago, Illinois);
- September 19 [US DOT Webinar on Stronger Grant Applications](#);
- October 1-4 [Railway Interchange Conference](#) (Indianapolis, IN);
- October 9-11 [APTA TRANSform Conference & EXPO](#) (Orlando, FL);
- October 10-13 [AASHTO/SPRC Annual Meeting](#) (San Diego, CA);
- October 17-19 [AASHTO Safety Summit](#) (Kansas City, MO);
- November 2 [Women in Rail Conference](#) (Chicago, IL);
- November 6-7 [Passenger Rail Law Workshop](#) (Washington, D.C.);
- November 12-16 [AASHTO Annual Meeting](#) (Indianapolis, IN);
- November 15-16 [Light Rail 2023](#) (Jersey City, NJ);
- Jan. 30 – Feb 2 2024 Winter Rail Meeting (Washington, D.C.).

SCUTTLEBUTT/ICYMI

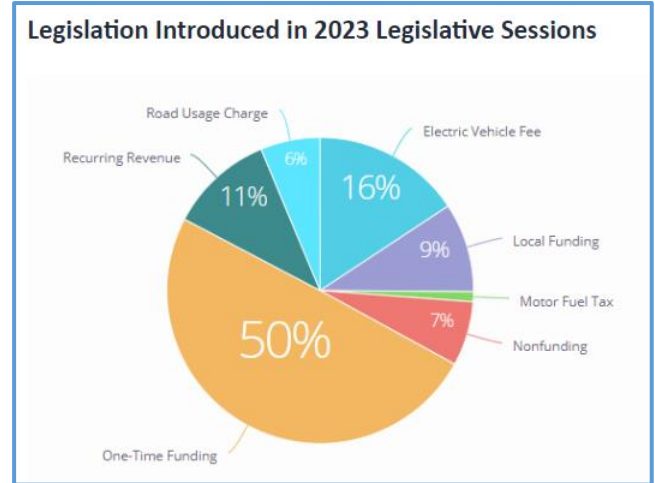
September 13, 2023. The Automobile Association of America (AAA) national average gas price can be found [here](#) (price per gallon as of 9/13/23). One month ago, the average price for regular gas was \$3.848 and one year ago the average price was \$3.707.



September 8, 2023. The Federal Railroad Administrator (FRA) Amit Bose sent a [letter](#) to several executives at the Union Pacific Railroad Company “to express serious concern about specific and significant risk to rail safety on the Union Pacific Railroad. The compliance of the rolling stock (freight cars and locomotives) on the UP network is poor and UP was unwilling or unable to take steps to improve the condition of their equipment.” Administrator Bose said the 19.93 percent defect rate on railcars and the 72.69 percent rate for locomotives that inspectors found in July and August are both twice the national average. Administrator Bose requested that UP to address the system-wide mechanical safety issues.

September 7, 2023. [Operation Lifesaver \(OLI\) released](#) a new public service announcement (PSA) educating the public about risky decisions around railroad tracks and crossings. The Risk is Real PSA illustrates consequences of unsafe choices around railroad tracks and crossings.

The PSA is available in 60, 30 and 20-second versions in English and Spanish on the [OLI website](#) as well as in the website's [Materials section](#). Funding for the project was provided by the Federal Railroad Administration. Also, [OLI released](#) five new transit posters for nationwide use reminding transit riders to make safe choices when traveling on transit and commuter trains. [September 6, 2023. ARTBA's Transportation Investment Advocacy Center](#) reports that as of the end of September, lawmakers in 28 states approved 36 measures for \$23 billion combined in new transportation revenue. See Executive Summary and State-by-State initiatives [here](#).



[August 31, 2023.](#) The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency, which manages the Amtrak Pacific Surfliner service, [announced](#) Operation Safe Surfs, a Rail Safety Initiative. The initiative designed to enhance rail safety awareness and curtail pedestrian and automobile incidents along the railroad, is slated to launch in September to coincide with Rail Safety Month. The Pacific Surfliner travels along a 351-mile coastal route through San Diego, Orange, Los Angeles, Ventura, Santa Barbara, and San Luis Obispo counties, serving 29 stations. It is the busiest state-supported intercity passenger rail route in the United States.

[August 30, 2023.](#) Sixteen US transportation industry stakeholders sent a [letter](#) to US DOT Secretary Pete Buttigieg to urge the establishment of an Office of Multimodal Freight Infrastructure and Policy within the US DOT, per the requirement of the IIJA. The letter notes that, “the Freight Office will serve as an important tool to help coordinate activities across the federal government and provide senior-level leadership to guide federal decision making in supply chain competitiveness, security, and fluidity.

[August 30, 2023.](#) The AAA published a report entitled, “[Your Driving Costs 2023](#)” noting that the overall cost to own and operate a new car in 2023 is \$12,182, or a monthly cost of \$1,015. See Your Driving Costs breakdown [here](#). See AAA article [here](#).

Addendum A. – Calendar Year NOFO/AWARDS SCORECARD. An Excel spreadsheet with “hot-links” is available from TG&A upon request.

<div> <div>TG&A</div> <div>Tai Ginsberg & Associates, LLC</div> <div>9/13/2023</div> </div> <div> <div>SELECTED TRANSPORTATION NOTICE OF FUNDING OPPORTUNITIES (NOFOs) &/OR AWARDS</div> <div>(TG&A SCORECARD for CY 2023)</div> </div>										
	NOFO TITLE	TYPE (NOFO / AWARD)	NOFO ISSUANCE DATE	NOFO URL	NOFO \$s MADE AVAILABLE	APPLICATION DEADLINE	NOFO \$ AWARDS	AWARDS URL	AWARDED - DATE	COMMENTS
DOE	FY 2023 Ride and Diver Electric Program	NOFO	5/18/2023	NOFO URL	51,000,000	7/28/2023	TBD	TBD	TBD	Concept papers due 6/16/23.
FAA										
	FY 2023 Airport Terminal Program	NOFO/AWARD	9/27/2022	NOFO URL	1,000,000,000	10/24/2022	1,000,000,000	AWARD URL	2/27/2023	Award Press Release.
	FAA Aircraft Pilots Workforce Development Grant Program - 2nd Round	NOFO/AWARD	4/26/2022	NOFO URL	5,000,000	6/17/2022	5,000,000	AWARD URL	3/2/2023	Deadline extended to 6/17/22.
	FAA Aviation Maint. Tech. Workers Workforce Development Grant Pgm. - 2nd Round	NOFO/AWARD	4/26/2022	NOFO URL	5,000,000	6/17/2022	5,000,000	AWARD URL	3/2/2023	Deadline extended to 6/17/22.
	Small Community Air Service Development Program (SCASDP)	NOFO	3/16/2023	NOFO URL	15,000,000	5/17/2023	TBD	TBD	TBD	
	FY 2023 Contract Tower Competitive Grant Program	NOFO	11/8/2022	NOFO URL	20,000,000	12/6/2022	20,000,000	AWARD URL	3/31/2023	Airport Award List
	FY 2023 Competitive Funding Opportunity: Airport Improvement Program	NOFO	4/14/2023	NOFO URL	1,500,000,000	7/14/2023	TBD	TBD	TBD	
	Fueling Aviation's Sustainable Transition (FAST) Grant Program.	NOFO	5/24/2023	RE-NOFO URL	291,000,000	TBD	TBD	TBD	TBD	Full NOFO to come at Grants.Gov
	FY 2022 Airport Improvement Program Competitive Supplemental Disc. Grants	NOFO/AWARD	12/28/2022	NOFO URL	268,728,965	1/31/2023	267,741,520	AWARD URL	7/11/2023	Airport Award List
	FY 2023 FAA Aviation Maintenance Tech. Workers Workforce Development Gnt. Pgm.	NOFO	12/18/2023	NOFO URL	9,000,000	8/16/2023	TBD	TBD	TBD	
	FY 2023 FAA Aircraft Pilots Workforce Development Grant Program	NOFO	12/18/2023	NOFO URL	4,500,000	8/16/2023	TBD	TBD	TBD	
	FY 2024 Airport Terminal Program (ATP)	NOFO	9/13/2023	NOFO URL	1,000,000,000	10/16/2023	TBD	TBD	TBD	
FHWA										
	FY 2022 Bridge Investment Program (Large Bridge Grant Receipts)	NOFO/AWARD	6/10/2022	NOFO URL	2,360,000,000	7/25 - 9/8/22	2,087,150,000	AWARD URL	1/4/2023	Award Press Release.
	FY 2022 Bridge Investment Program (Bridge Grant Receipts)	NOFO/AWARD	6/11/2022	NOFO URL	2,360,000,000	7/25 - 9/8/23	295,748,713	AWARD URL	4/13/2023	Award Recipients
	FY 2023 Admn. of the Dwight David Eisenhower Transpo. Fellowship Pgm. (DDETFP)	NOFO	2/18/2023	NOFO URL	1,000,000	3/28/2023	TBD	TBD	TBD	Institution of Higher Education (IHE) of Minority Serving Institutions
	FY 2022-2026 D. D. Eisenhower Transportation Fellowship Pgm. Graduate Fellowship	NOFO	2/22/2023	NOFO URL	1,000,000	4/7/2023	TBD	TBD	TBD	\$1 million per year (FYs 2022-2026).
	Center of Excellence on New Mobility and Automated Vehicles (Mobility COE)	NOFO	4/5/2023	NOFO URL	1,500,000	6/6/2023	TBD	TBD	TBD	Total potential funding of \$7.5 million.
	FYs 2022-2023 Wildlife Crossings Pilot Program (WCPP)	NOFO	4/5/2023	NOFO URL	111,850,000	8/1/2023	TBD	TBD	TBD	
	FY 2022/'23 Promoting Resilient Ops./Transformative, Efficient/Cost-Saving Transpo.	NOFO	4/21/2023	NOFO URL	848,000,000	8/18/2023	TBD	TBD	TBD	
	FY 2022/2023 Reduction of Truck emissions at Port Facilities Grant Program (RTEPF)	NOFO	4/28/2023	NOFO URL	160,000,000	6/26/2023	TBD	TBD	TBD	
	FY 2022 National Scenic Byways Program	NOFO/AWARD	3/17/2022	NOFO URL	22,000,000	5/16/2022	21,849,689	AWARD URL	4/28/2023	Letter of Intent due 4/4/2022.
	FY 2023 Innovative Asphalt Pavement Technologies Program	NOFO	5/3/2023	NOFO URL	5,000,000	6/28/2023	TBD	TBD	TBD	
	Advancing Sustainability and Resilience in Pavements Program	NOFO	5/12/2023	NOFO URL	7,500,000	6/26/2023	TBD	TBD	TBD	
	FY 2022 Advanced Transportation Tech. & Innovative Mobility Deployment Pgm.	NOFO	9/19/2022	NOFO URL	60,000,000	10/12/2022	52,780,000	AWARD URL	5/25/2023	AKA ATTAIN
	FY 2023 Work Zone Safety Grants	NOFO	6/1/2023	NOFO URL	10,000,000	7/14/2023	TBD	TBD	TBD	
	FY 2022-2026 Advanced Digital Construction Management Systems (ADCMS)	NOFO	6/27/2023	NOFO URL	115,000,000	8/28/2023	TBD	TBD	TBD	\$34 m. for each of FY '22/23; \$17 m. for each of FY '24-26.
	FY 2023 Nationally Significant Federal Lands and Tribal Projects Program	NOFO	7/7/2023	NOFO URL	88,290,000	9/6/2023	TBD	TBD	TBD	
	FY 2022 Nationally Significant Federal Lands and Tribal Projects Program	NOFO/AWARD	8/18/2022	NOFO URL	125,215,000	10/24/2022	130,548,129	AWARD URL	7/6/2023	Award Press Release
	FY 2022 National Culvert Removal, Replacement, and Restoration Grant Program	NOFO/AWARD	10/6/2022	NOFO URL	196,000,000	2/6/2023	195,877,358	AWARD URL	8/16/2023	Awards URL
	FY 2021 Accelerated Innovation Deployment (AID) Demonstration Program	NOFO/AWARD	7/2/2021	NOFO URL	10,000,000	9/28/2021	8,842,307	AWARD URL	8/22/2023	
FRA										
	FY 2023 Northeast Corridor Commission (NECC) Project	NOFO	1/20/2023	NOFO URL	6,000,091	2/2/2023	TBD	TBD	TBD	
	FY 2022 Corridor Identification and Development Grant Program (Updated NOFO)	NOFO	1/14/2023	NOFO URL	365,000,000	3/27/2023	TBD	TBD	TBD	FR Notice 12/20/2022
	FY 2022 Federal-State Partnership for Intercity Passenger Rail Program (FSP) for projects NOT located on the Northeast Corridor (Updated NOFO)	Updated NOFO	2/2/2023	NOFO URL	4,566,300,000	4/21/2023	TBD	TBD	TBD	FR Notice 3 February 2023
	FY2022 CRISI ME Northern Rail	NOFO	2/23/2023	NOFO URL	12,960,000	3/10/2023	TBD	TBD	TBD	Congressionally Directed Funding to the State of Maine.
	FY 2023 Supplemental for Amtrak	NOFO	4/28/2023	NOFO URL	878,172,428	5/5/2023	N/A	N/A	N/A	Amtrak is the only entity eligible to
	FY 2023 Supplemental for Amtrak's Northeast Corridor	NOFO	4/28/2023	NOFO URL	1,065,313,888	5/5/2023	N/A	N/A	N/A	Amtrak is the only entity eligible to
	FY 2022/2023 Rail Research & Development Center of Excellence (CoE)	NOFO	5/1/2023	NOFO URL	5,000,000	7/3/2023	N/A	N/A	N/A	NOFO Correction 5/23/23.
	FYs 2022/2023 Competitive Grants for Rail Vehicle Replacement Program	NOFO/AWARD	10/12/2022	NOFO URL	600,000,000	1/5/2023	703,093,337	AWARD URL	5/5/2023	Note: \$300 m for each of FYs 2022/2023.
	Interstate Rail Compacts Grant Program	NOFO	5/8/2023	NOFO URL	5,815,800	7/10/2023	TBD	TBD	TBD	FR Noticed 9 May 2023.
	FY 2023 Northeast Corridor IJA Supplemental Cooperative Agreement to Amtrak	NOFO	6/1/2023	NOFO URL	1,189,000,000	6/15/2023	TBD	TBD	TBD	Amtrak is the only entity eligible to apply.
	FY 2023 Supplemental State-Amtrak Intercity Passenger Rail Committee	NOFO	6/1/2023	NOFO URL	1,565,000	6/9/2023	TBD	TBD	TBD	NNEPRA is the only entity eligible to apply
	FY 2023 National Network IJA Supplemental Cooperative Agreement	NOFO	6/1/2023	NOFO URL	3,143,000,000	6/15/2023	TBD	TBD	TBD	Amtrak is the only entity eligible to apply.
	FY 2022 Railroad Crossing Elimination Program	NOFO/AWARD	6/30/2022	NOFO URL	573,264,000	10/11/2022	570,000,000	AWARD URL	6/5/2023	FRA Press Release.
	FY 2023 Rail Safety Innovations Deserving Exploratory Analysis (Rail Safety IDEA)	NOFO	6/28/2023	NOFO URL	400,000	7/14/2023	TBD	TBD	TBD	The National Academy of Sciences is the only entity eligible to apply.
	FY 2017-2023 Special Transportation Circumstances Projects Program	NOFO	8/17/2023	NOFO URL	139,022,333	9/29/2023	TBD	TBD	TBD	Exclusive Alaska, South Dakota &
	FY 2023 Highway-Rail Grade Crossing Safety Education and Enforcement Program	NOFO	8/21/2023	NOFO URL	1,000,000	9/22/2023	TBD	TBD	TBD	Exclusive to Operation Lifesaver.
	FY 2023 Reconstruction of Substation 41	NOFO	8/29/2023	NOFO URL	21,000,000	9/1/2023	TBD	TBD	TBD	Amtrak is the only entity eligible to
US DEPT. OF LABOR										
	Building Pathways to Infrastructure Jobs Grant Program	NOFO	4/5/2023	NOFO URL	80,000,000	7/7/2023	TBD	TBD	TBD	
FTA										
	FY 2023 Areas of Persistent Poverty Program	NOFO/AWARD	1/6/2023	NOFO URL	20,041,870	3/10/2023	20,041,613	AWARD URL	7/20/2023	FTA Press Release
	FY 2023 Low or No Emission Grant Program.	NOFO/AWARD	1/26/2023	NOFO URL	1,221,350,117	4/13/2023	1,700,000,000	AWARD URL	6/26/2023	List of Awards
	FY 2023 Grants for Buses and Bus Facilities Program	NOFO/AWARD	1/26/2023	NOFO URL	469,445,424	4/13/2023	1,700,000,000	AWARD URL	6/26/2023	List of Awards

<div> <div> <div>TG&A</div> <div>THE GINSBERG & ASSOCIATES, LLC</div> </div> <div> <div>9/13/2023</div> </div> </div> <div> <div>SELECTED TRANSPORTATION NOTICE OF FUNDING OPPORTUNITIES (NOFOs) &/OR AWARDS</div> <div>(TG&A SCORECARD for CY 2023)</div> </div>										
	NOFO TITLE	TYPE (NOFO / AWARD)	NOFO ISSUANCE DATE	NOFO URL	NOFO \$ MADE AVAILABLE	APPLICATION DEADLINE	NOFO \$ AWARDS	AWARDS URL	AWARDED - DATE	COMMENTS
	FY 2022 Ferry Grant Programs (3 Separate Programs Combined)	NOFO/AWARD	7/8/2022	NOFO URL	294,500,000	9/6/2022	384,354,926	AWARD URL	1/26/2023	List of Awards
	FY 2022 Safe Streets and Roads for All (SS4A) Grant Program	NOFO/AWARD	5/16/2022	NOFO URL	1,000,000,000	9/15/2022	800,000,000	AWARD URL	2/1/2023	473 Action Plan Awards and 37 Implementation Grant Awards
	FY 2021 Mobility, Access, Transpo. Insecurity-Creating Links/Opportunity Demo.	NOFO/AWARD	8/8/2022	NOFO URL	6,000,000	10/11/2022	6,000,000	AWARD URL	2/8/2023	
	FTA Emergency Relief Funding for CYs 2017, 2020, 2021, 2022	NOFO/AWARD	3/24/2023	NOFO URL	212,301,048	5/26/2023	102,325,551	AWARD URL	7/31/2023	FR Notice 27 March 2023.
	Community Mobility Design Challenge 2023	NOFO	3/26/2023	NOFO URL	25,000 each to 4 teams	8/4/2023	TBD	TBD	TBD	Application Package
	FY 2023 Passenger Ferry Grant Program	NOFO	5/17/2023	NOFO URL	50,100,000	7/17/2023	TBD	TBD	TBD	
	FY 2023 Ferry Service for Rural Communities Program	NOFO	5/17/2023	NOFO URL	170,000,000	7/17/2023	TBD	TBD	TBD	
	Public Transportation Innovation Program	NOFO/AWARD	9/21/2022	NOFO URL	6,500,000	11/21/2022	11,637,691	AWARD URL	6/8/2023	List of Awards
	FY 2023 Pilot Program for Transit-Oriented Development Planning (TOD Pilot Program).	NOFO	8/7/2023	NOFO URL	13,460,978	10/10/2023	TBD	TBD	TBD	
MARAD										
	2023 Port Infrastructure Development Program (PIDP)	NOFO	12/31/2022	NOFO URL	662,203,512	4/28/2023	TBD	TBD	TBD	Full NOFO Published on 2/8/23.
	FY 2023 Small Shipyard Grants Program	NOFO/AWARD	1/17/2023	NOFO URL	20,800,000	2/27/2023	20,800,000	AWARD URL	5/3/2023	Maritime NOFO
	FY 2023 US Marine Highway Program	NOFO	2/28/2023	NOFO URL	12,423,000	4/28/2023	TBD	TBD	TBD	
NHTSA / FMCSA										
	FY 2023 High Priority Program – Innovative Technology Deployment	NOFO	2/1/2023	NOFO URL	2,000,000	4/3/2023	TBD	TBD	TBD	
	FY 2023 Commercial Motor Vehicle Operator Safety Training Program	NOFO	2/1/2023	NOFO URL	3,200,000	4/3/2023	TBD	TBD	TBD	
	FY 2023 Commercial Driver's License Program Implementation	NOFO	2/1/2023	NOFO URL	70,400,000	4/3/2023	TBD	TBD	TBD	
	FY 2023 High Priority Program – Commercial Motor Vehicle	NOFO	2/1/2023	NOFO URL	43,300,000	4/3/2023	TBD	TBD	TBD	
	Collegiate Impaired Driving Learning Collaborative (CIDLC) Program	NOFO	2/15/2023	NOFO URL	750,000	5/15/2023	TBD	TBD	TBD	
	Native American Pedestrian Safety Demonstration	NOFO	6/16/2023	NOFO URL	507,000	7/14/2023	TBD	TBD	TBD	\$507,000 is available to fund up to one (1) discretionary Cooperative Agreement.
	Fiscal Year 2024 Commercial Vehicle Safety Plans to Support National Safety Goals	NOFO	6/22/2023	NOFO URL	4,792,025,000	8/21/2023	TBD	TBD	TBD	
OPERATION LIFESAVER										
	Public Safety Awareness Campaigns in 12 States	AWARD	N/A	N/A	N/A	N/A	230,925	AWARD URL	3/30/2023	
	Innovative Rail Safety Competitive Grant for Xing Safety in New York	AWARD	N/A	N/A	N/A	N/A	50,000	AWARD URL	4/6/2023	
	Crossing Safety Public Awareness Campaigns in 12 States	AWARD	N/A	N/A	N/A	N/A	214,075	AWARD URL	4/25/2023	
US DHS / FEMA										
	FY 2022 Assistance to Firefighters Grants	NOFO	1/9/2023	NOFO URL	324,000,000	2/10/2023	TBD	TBD	TBD	AFG Grants.Gov Reference
	FY 2022 Assistance to Firefighters Grants (SAFER) Program	NOFO	2/6/2023	NOFO URL	360,000,000	3/17/2023	TBD	TBD	TBD	
	FY 2022 AFG Program, Fire Prevention and Safety Grants Program (FP&S)	NOFO	2/22/2023	NOFO URL	36,000,000	3/31/2023	TBD	TBD	TBD	
	FY 2023 Port Security Grant Program (PSGP)	NOFO	2/27/2023	NOFO URL	100,000,000	5/18/2023	TBD	TBD	TBD	
	FY 2023 Intercity Passenger Rail Program (IPR)	NOFO	2/27/2023	NOFO URL	10,000,000	5/18/2023	TBD	TBD	TBD	
	FY 2023 Intercity Bus Security Grant Program (IBSGP)	NOFO	2/27/2023	NOFO URL	2,000,000	5/18/2023	TBD	TBD	TBD	
	FY 2023 Transit Security Grant program (TSGP)	NOFO	2/27/2023	NOFO URL	93,000,000	5/18/2023	TBD	TBD	TBD	
	FY 2023 State Fire Training Systems Grant (SFTSG) program	NOFO	6/9/2023	NOFO URL	1,000,000	7/10/2023	TBD	TBD	TBD	Awards of \$20K to 50 projects.
US DOT										
	FY 2023 National Infrastructure Investments (Local/Reg. Proj. Asst.) - RAISE Grants	NOFO/AWARD	12/1/2022	NOFO URL	2,275,000,000	2/28/2023	2,200,000,000	Award URL	6/28/2023	NOFO updated 1/6/23 to reflect added FY '23 Omnibus funding of \$800
	University Partnership Program	NOFO	1/20/2023	NOFO URL	590,000	3/13/2023	TBD	TBD	TBD	
	FY 2022 National Infrastructure Project Assistance (Mega Projects)	NOFO/AWARD	3/25/2022	NOFO URL	1,000,000,000	5/23/2022	1,172,171,053	AWARD URL	1/31/2023	
	Reconnecting Communities Pilot (RCP) Discretionary Grant Program	NOFO/AWARD	6/30/2022	NOFO URL	195,000,000	10/13/2022	185,000,000	AWARD URL	2/28/2023	Award Press Release.
	Thriving Communities Technical Assistance (Dept. of Housing/Urban Development)	NOFO	3/1/2023	NOFO URL	5,000,000	3/2/2023	TBD	TBD	TBD	
	FY 2022/FY 2023 Charging and Fueling Infrastructure (CFI) Discretionary Grant Pgm.	NOFO	3/14/2023	NOFO URL	700,000,000	6/13/2023	TBD	TBD	TBD	
	FY 2022 Strengthening Mobility & Revolutionizing Transportation Grants Pgm.	NOFO/AWARD	9/19/2022	NOFO URL	100,000,000	12/18/2022	94,783,781	AWARD URL	3/21/2023	
	FY 2023 Safe Streets and Roads for All Funding Opportunity (SS4A)	NOFO	3/31/2023	NOFO URL	1,177,213,000	7/10/2023	TBD	TBD	TBD	
	FY 2022 Thriving Communities Program	NOFO/AWARD	10/6/2022	NOFO URL	25,000,000	11/29/2022	21,150,000	AWARD URL	4/7/2023	LOI Announcement
	FY 2022/2023 Regional Infrastructure Accelerator (RIA) Grant Program	NOFO	4/26/2023	NOFO URL	24,000,000	5/30/2023	TBD	TBD	TBD	
	RRIF Express Program	NOFO	5/31/2023	NOFO URL	35,000,000,000	12/1/2023	TBD	TBD	TBD	
	FY 2022/2023 Rural and Tribal Assistance Pilot Program	NOFO	6/14/2023	NOFO URL	3,400,000	See Comments and here for NOFO Correction	TBD	TBD	TBD	TBD Reviewed on a rolling (first-come, first-served) basis until available funding is expended. The application window will open on 8/14/2023.
	MPDG - National Infrastructure Project Assistance grants Program (Mega)	Combined NOFO	6/27/2023	NOFO URL	1,800,000,000	8/21/2023	TBD	TBD	TBD	
	MPDG - Nationally Significant Multimodal Freight/Highways Projects Program (INFRA)	Combined NOFO	6/27/2023	NOFO URL	3,100,000,000	8/21/2023	TBD	TBD	TBD	
	MPDG - Rural Surface Transportation Grant Program (Rural)	Combined NOFO	6/27/2023	NOFO URL	675,000,000	8/21/2023	TBD	TBD	TBD	
	FY 2023 Reconnecting Communities Pilot (RCP) Program	Combined NOFO	7/5/2023	NOFO URL	198,000,000	9/28/2023	TBD	TBD	TBD	
	FY 2023 Neighborhood Access and Equity (NAE) Program	Combined NOFO	7/5/2023	NOFO URL	3,155,000,000	9/28/2023	TBD	TBD	TBD	
	FY 2023 Strengthening Mobility & Revolutionizing Transportation (SMART) Gnts. Pgm.	NOFO	8/8/2023	NOFO URL	50,000,000	10/10/2023	TBD	TBD	TBD	\$50 m. for Stage 1 and \$50 m. for Stage 2.
	FY 2023 Thriving Communities Program	NOFO	8/16/2023	NOFO URL	22,000,000	12/15/2023	TBD	TBD	TBD	Call for LOIs - Deadline 11/15/2023
	FY 2022/2023 Innovative Finance and Asset Concessions Grant Program	NOFO	8/16/2023	NOFO URL	38,860,000	11/17/2023	TBD	TBD	TBD	Forecasted Opportunity
	Bridge Research and Technology (UTC)	NOFO	9/7/2023	NOFO URL	5,000,000	10/13/2023	TBD	TBD	TBD	Must be US DOT-funded Univ. Transp.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 4

INFORMATION

Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Allowing a Revenue Management Pilot for the San Joaquins Intercity Passenger Rail Service from November 1, 2023, through June 30, 2024, and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project Including Any and All Amendments thereto within Her Spending Authority

Background:

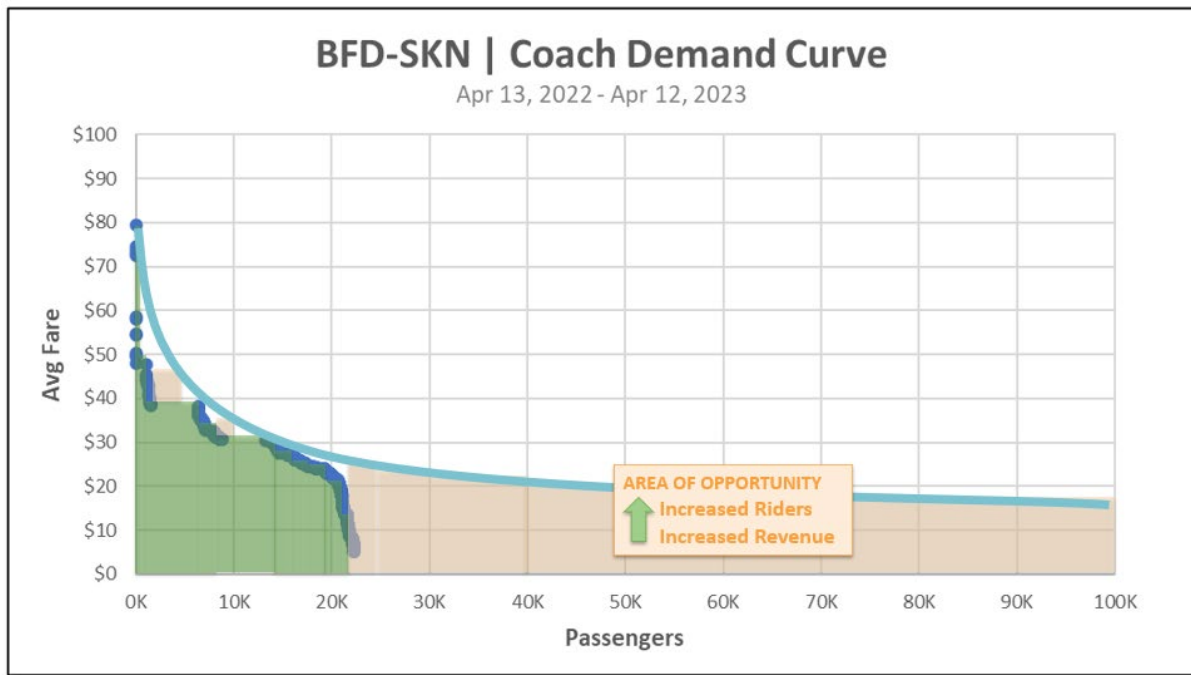
Currently, Amtrak San Joaquins tickets are sold under a Reserved System, which requires tickets to be purchased prior to the train departure. Fare Setting for tickets is managed by a calculation governed by distance, with a descending fare per mile contribution as trip distance increases. Passengers purchasing a Thruway Bus and train ticket pay the combination of the Thruway Bus fare and the train fare for the portions of the services traveled. The San Joaquins does not offer a transfer discount, as the Thruway Bus fares have been constructed at a lower cost per mile than the train, providing an inherent discount for utilizing both services. The San Joaquins operate with a single bucket fare program, with peak and shoulder pricing typically around holiday periods. The San Joaquins offer many standardized and seasonal discounts to provide economic relief for riders and drive incremental ridership and revenue.

Prior to the current fare policy, the San Joaquins utilized Revenue Management, under the control of Amtrak, to maximize revenue generation for the service. In 2018, the San Joaquin Joint Powers Authority (Authority) took action to change the Fare Policy to eliminate Revenue Management. This action was recommended for several factors, including but not limited to the following:

1. Prices escalating to the point of potential passengers being “priced out” of their trip.
2. Revenue management disadvantaged potential riders at stations.
3. Revenue management was not leading to increases in ridership, but focused more on revenue growth.

Reinstating Revenue Management:

Based on a recent analysis from Amtrak, their data shows that the San Joaquins is priced at the upper end of what passengers are willing to pay for the service. By analyzing the throughput of sales across all the price points for individual trips on the San Joaquins, including those booked with a discount, tickets purchased at or near the current standard fare are limited while lower fares (acquired by discounts) are higher in quantity. For example, the current fare between Bakersfield (BFD) and Stockton (SKN) is \$38.25. Sales near this mark, as represented in the figure below, are just under ten thousand while many more bookings are demonstrated at lower price points. The use of a demand curve would demonstrate that spreading out fares across additional buckets to lower the cost of trips would result in additional bookings.



The recommendation is to move the San Joaquins from a single bucket with peak pricing fare structure, to a revenue managed fare structure with 15 available price points. As illustrated in the previous example, the recommendation is not to utilize buckets with higher fares, as done previously, but to utilize a series of primarily lower buckets to drive revenue growth with ridership growth. To illustrate the change, the BFD to SKN example is illustrated below:

2 Price Points				15 Price Points		
TODAY				3 to 2 Fare Families		
RBD	Saver	Value	Flex	RBD	Value	Flex
Y	\$30.50*	\$38.25^		Y		\$49
				YA	\$43	\$45
				YB	\$37	\$39
				YC	\$32	\$34
				YD	\$28	\$30
				YE	\$24	\$25
				YF	\$21	\$22
				YG	\$18	\$19

* 7 Day Advance Purchase Fare
^ \$47.75 on Peak Days

3 to 2 Fare Families

- Additional price points
- Reasonable Buy-up to Flex
- Even greater ability to generate additional **riders and revenue**

This change is projected to have an over 20% positive effect on ridership and revenue. Staff's recommendation is for the use of Revenue Management to be reinstated as a pilot program from November 1, 2023, through June 30, 2024. The 8-month period will provide ample time to promote the change, allow potential riders to experience the lower buckets, and judge whether the move will have a positive effect on the service.

Fiscal Impact:

There is no fiscal impact. No costs are associated with the pilot and Fare Revenue is projected to increase as a result.

Recommendation:

Approve a Resolution of the Governing Board of the San Joaquin Joint Powers Authority Allowing a Revenue Management Pilot for the San Joaquins Intercity Passenger Rail Service from November 1, 2023, through June 30, 2024, and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project Including Any and All Amendments thereto within Her Spending Authority.

SJJP Resolution 23/24-

RESOLUTION OF THE GOVERNING BOARD OF THE SAN JOAQUIN JOINT POWERS AUTHORITY ALLOWING A REVENUE MANAGEMENT PILOT FOR THE SAN JOAQUINS INTERCITY PASSENGER RAIL SERVICE FROM NOVEMBER 1, 2023, THROUGH JUNE 30, 2024, AND AUTHORIZING THE EXECUTIVE DIRECTOR TO NEGOTIATE, AWARD, AND EXECUTE ANY AND ALL AGREEMENTS AND DOCUMENTS RELATED TO THE PROJECT INCLUDING ANY AND ALL AMENDMENTS THERETO WITHIN HER SPENDING AUTHORITY

WHEREAS, currently, San Joaquins tickets are sold under a Reserved System, which requires tickets to be purchased prior to the train departure; and

WHEREAS, Fare Setting for tickets is managed by a mathematical calculation governed by distance with a descending fare per mile contribution as trip distance increases; and

WHEREAS, the San Joaquins operate with a single bucket fare program with peak and shoulder pricing, typically around holiday periods; and

WHEREAS, previous to the current fare policy, the San Joaquins utilized Revenue Management, under the control of Amtrak, to maximize revenue generation for the service; and

WHEREAS, in 2018, San Joaquin Joint Powers Authority (Authority) took action to change the Fare Policy to eliminate Revenue Management due to several factors; and

WHEREAS, based on recent analysis from Amtrak, the San Joaquins may be priced at the upper end of the pay potential for passengers; and

WHEREAS, by analyzing the throughput of sales across all of the price points for individual trips on the San Joaquins, including those booked with a discount, tickets purchased at or near the current standard fare are limited while lower fares (acquired by discounts) are higher in quantity; and

WHEREAS, the recommendation is to move the San Joaquins from a single bucket with peak pricing fare structure to a revenue managed fare structure with 15 available price points; and

WHEREAS, this change is projected to have an over 20% positive affect on ridership and revenue; and

WHEREAS, staff's recommendation is for the use of Revenue Management to be reinstated as a pilot program from November 1, 2023, through June 30, 2024; and

NOW, THEREFORE, BE IT RESOLVED that the Governing Board of the San Joaquin Joint Powers Authority hereby Allowing a Revenue Management Pilot for the San Joaquins Intercity Passenger Rail Service from November 1, 2023, through June 30, 2024, and Authorizing the Executive Director to Negotiate, Award, and Execute Any and All Agreements and Documents Related to the Project Including Any and All Amendments thereto within Her Spending Authority.

PASSED AND ADOPTED, by the SJJPA on this 22nd day of September 2023, by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

ATTEST:

SAN JOAQUIN JOINT POWERS
AUTHORITY

STACEY MORTENSEN, Secretary

PATRICK HUME, Chair

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 5

INFORMATION

Presentation to the Board on the Draft Accessibility Compliance with U.S. Department of Transportation (USDOT) Level Boarding Regulation for the Existing and Proposed Stations

Background:

Americans with Disabilities Act (ADA) of 1990 is a federal statute that prohibits discrimination and ensures equal opportunity and access for persons with disabilities. It is the San Joaquin Joint Powers Authority (Authority) responsibility to ensure that its transit service and access to its facilities are accessible.

In accordance with the amended Americans with Disability Act of 1990 (ADA) (42 U.S.C. 1201 et seq.) (49 CFR 37.42), "individuals with disabilities, including individuals who use wheelchairs, must have access to all accessible cars available to passengers without disabilities in each train using a station".

Systemwide platform changes are being implemented at 20 existing stations and 16 new stations which are receiving alterations to the ADA boarding method or proposing to continue to use the existing ADA boarding method of mini-high platforms or wheelchair lifts. In accordance with the amended Americans with Disability Act of 1990, the San Joaquin Regional Rail Commission (Rail Commission) and the Authority are preparing an Equivalent Facilitation Request Report to outline the analysis conducted for accessibility options for the existing and proposed station platforms receiving alterations which will be submitted to federal agencies for approval. The Authority will be proceeding with public outreach accordingly over the coming months.

The amended Americans with Disability Act of 1990 (ADA) (42 U.S.C. 1201 et seq.) 49 CFR 37.42(b), "For new or altered stations serving commuter, intercity, or high-speed rail lines or systems, in which track passing through the station and adjacent to platforms is shared with existing freight rail operations, the railroad operator may comply with the performance standard... by use of one or more of the following means: (1) level-entry boarding; (2) car-borne lifts; (3) bridge plates, ramps or other appropriate devices; (4) mini-high platforms, with multiple mini-high platforms or multiple train stops, as needed, to permit access to all accessible cars available at that station; or (5) station-based lifts."

Section 49 CFR 37.42(d)(2) states the following, "The railroad operator must submit a plan to FRA and/or FTA, describing its proposed means to meet the performance standard... at that station. The plan must demonstrate how boarding equipment or platforms would be deployed, maintained, and operated; and how personnel would be trained and deployed to ensure that service to individuals with disabilities is provided in an integrated, safe, timely, and reliable manner."

The information provided in the Accessibility Compliance with USDOT Level Boarding Regulation Report constitutes the Rail Commission and Authority's site-specific Rail Accessibility Plan for each station project to comply with the performance standards established in 49 CFR Parts 37 and 38 (listed above).

The Draft Accessibility Compliance with USDOT Level Boarding Regulation Report for the Valley Rail Program Stations will be made available for public view and comments. Any comments received from the public will be considered for inclusion in the final Accessibility Compliance with USDOT Level Boarding Regulation Report, which will be brought to the Board at the January 2024 meeting as part of the final recommendation for affected stations.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an information item only. Staff intends to bring the final revisions of the Accessibility Compliance with USDOT Level Boarding Regulation Report to the Board in January 2024 for approval.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 6

INFORMATION

San Joaquins Passenger Survey Update

Background:

In the Spring of 2023, San Joaquins consultants conducted an onboard survey. The survey was administered via tablets and postcards among San Joaquins riders while onboard the train. The survey collected a total of 1,400 valid complete questionnaires from riders intercepted over nine days in April 2023 on seventeen San Joaquins trains. The survey was conducted as a self-administered, tablet-based intercept study among riders on the train (Table 1 illustrates the schedule and capture metrics for the survey effort). Respondents were provided with a tablet to complete the survey or were given a postcard with a survey link to complete the survey on their own device. The goal of the survey was to gain an understanding of travel patterns, but also customer satisfaction, preferences regarding train times, and demographic profiles of current San Joaquins riders. The data obtained from the survey provides an understanding of who rides the San Joaquins, why they do so, and their satisfaction with different service aspects. It can also help to uncover differences in San Joaquins usage and perception between varying demographic and geographic groups.

TABLE 1: SAMPLED TRAINS WITH RIDERSHIP AND RESPONSE

Direction	Train Number	Day Surveyed	Actual Ridership	Station Departure Time	Valid Survey Completes	% Riders Surveyed
Southbound	716	Wed, 4/12	224	OAK 1:36 PM	82	36.6%
Southbound	718	Wed, 4/12	217	OAK 5:36 PM	50	23.0%
Northbound	717	Thurs, 4/13	144	BFD 2:12 PM	96	66.7%
Northbound	719	Thurs, 4/13	139	BFD 4:12 PM	70	50.4%
Southbound	712	Fri, 4/14	180	OAK 9:36 AM	108	60.0%
Southbound	714	Fri, 4/14	158	OAK 11:36 AM	112	70.9%
Northbound	715	Sat, 4/15	384	BFD 12:12 PM	96	25.0%
Northbound	717	Sat, 4/15	237	BFD 2:12 AM	56	23.6%
Southbound	710	Sat, 4/22	263	OAK 7:36 AM	89	33.8%
Southbound	712	Sat, 4/22	261	OAK 9:36 AM	89	34.1%
Northbound	713	Sun, 4/23	272	BFD 8:12 AM	109	40.1%
Northbound	715	Sun, 4/23	384	BFD 12:12 PM	127	33.1%
Southbound	712	Mon, 4/24	180	OAK 9:36 AM	65	36.1%
Southbound	710	Mon, 4/24	180	OAK 7:36 AM	78	43.3%
Northbound	703	Tues, 4/25	72	BFD 6:12 PM	31	43.1%
Northbound	711*	Tues, 4/25	162	BFD 4:12 AM	62	38.3%
Southbound	702	Thurs, 4/27	104	SAC 6:28 AM	78	75.0%
TOTAL			3,561		1,401	

Over half of surveyed riders are under the age of 35 (54%) and one-fifth of respondents are over 55. Just over half of the respondents are female (54%). A plurality of respondents identified as white (44%). 5% of respondents (n = 72) took the survey in Spanish.

Three in ten respondents are currently in college or have completed some college, and 42% are currently employed full-time. Respondents are almost uniformly distributed across the size of the households; just over one-fifth of them live alone (23%) and just under one-fifth live in a home with five or more people, though most do not live in a home with children (67%). A plurality of respondents live in single-income homes (36%), have one vehicle for their household (31%), and have annual household incomes less than \$25,000 (32%). Most respondents own a smartphone (85%), or a laptop/tablet (56%), or both.

TABLE 2: ONBOARD SURVEY DEMOGRAPHICS

Demographics	Onboard Survey
Age	
Under 25	33%
25 - 34	21%
35 - 44	16%
45 - 54	10%
55 - 61	8%
62+	12%
Gender	
Female	54%
Male	43%
Other/Prefer not to answer	2%
Race	
White	44%
African American / Black	19%
Asian	11%
American Indian / Alaskan Native	7%
Pacific Islander	3%
Other	22%
Are you of Spanish, Hispanic, or Latino origin?	
Yes	46%
No	54%
Income (<50k and >50k)	
Less than \$25,000	32%
\$25,000 - \$34,999	13%
\$35,000 - \$49,999	13%
\$50,000 - \$99,999	23%
\$100,000 - \$149,999	9%
More than \$150,000	10%

Additionally, San Joaquin Joint Powers Authority (Authority) consultants conducted a Market Survey. The Market Survey was distributed entirely online to residents of San Joaquins' primary geographical markets. The main goals of this survey were to investigate awareness and perceptions of the San Joaquins route and connections, and to better understand travel patterns and needs (independent of mode) of those in the San Joaquins region. The Authority can use the survey results to see if there is potential for improving the San Joaquins service, as well as shaping more effective marketing and outreach strategies that speak to new riders or increase trip-making by current riders. The data obtained from both surveys provides a complete understanding of who rides the San Joaquins, who does not, and why they do so. It can also help to uncover differences in San Joaquins usage and perception between varying demographic and geographic groups.

Staff will present a summary of the findings. The full reports are attached.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

There is no action requested. This is an informational item.

San Joaquins Joint Powers Authority

SJJPA PASSENGER SURVEY FINAL REPORT

June 26, 2023





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1.0 EXECUTIVE SUMMARY

In the spring of 2023, RSG conducted an onboard survey on behalf of the San Joaquin Joint Powers Authority (SJJPA). The survey was administered via tablets and postcards to San Joaquin riders while on the train and collected a total of 1,406 valid complete responses from seventeen total trains.

Respondent Profiles

The demographics of onboard survey respondents can be found in Table 1. Over half of surveyed riders are under the age of 35 (54%), and over half identify as female (54%). The majority of the sample identifies as White (44%). Nearly half have Hispanic or Latino origin (46%). Fifty-eight percent have an annual household income of less than \$50,000 before taxes.

TABLE 1: ONBOARD SURVEY DEMOGRAPHICS

Demographics	Onboard Survey
Age	
Under 25	33%
25 - 34	21%
35 - 44	16%
45 - 54	10%
55 - 61	8%
62+	12%
Gender	
Female	54%
Male	43%
Other/Prefer not to answer	2%
Race	
White	44%
African American / Black	19%
Asian	11%
American Indian / Alaskan Native	7%
Pacific Islander	3%
Other	22%
Are you of Spanish, Hispanic, or Latino origin?	
Yes	46%
No	54%
Income (<50k and >50k)	

Less than \$25,000	32%
\$25,000 - \$34,999	13%
\$35,000 - \$49,999	13%
\$50,000 - \$99,999	23%
\$100,000 - \$149,999	9%
More than \$150,000	10%

n = 1,355 - 1,406 (Respondents did not have to answer income question)

Intercepted Trip

Bakersfield, Fresno, and Stockton are the most common boarding and alighting stations, accounting for 48% of all boardings and 52% of all alightings, respectively. The majority of respondents were traveling to visit family or friends when they were intercepted (51%). Compared to 2019, trips for leisure or vacation decreased by 14 percentage points from 29% in 2019 to 15% in 2023. More than half of respondents' trips were round-trip on the San Joaquins (54%), a number that remained unchanged from 2019. Even so, fewer riders including an overnight stay during their trip in 2023 (44%, down from 56% in 2019). Three-quarters of respondents (75%) traveled alone. The percentage of riders purchasing their tickets via Amtrak for mobile increased by 14 percentage points from 2019 to 2023 (16% vs. 30%, respectively). When asked what an alternative mode of transportation would be, the car is the most frequently mentioned mode, independent of the respondent's home region. However, San Joaquin Valley residents are mentioning the car more frequently than residents from other regions (e.g., LA), and 25% of Sacramento Area residents state that they would not have made the trip, if the San Joaquins were not an option.

San Joaquins Travel and Satisfaction

The frequency with which current riders make trips on the San Joaquins has increased slightly since 2019; fourteen percent of respondents ride at least once per week in 2023, compared to eleven percent in 2019. Just under half of 2023 respondents (48%) rode the San Joaquins prior to the COVID-19 pandemic. The top reasons respondents have for choosing the San Joaquins are the relaxing trip (42%), lower cost (39%), and convenience (37%). More than four in ten respondents would be motivated to ride the San Joaquins more if tickets were cheaper (42%) and 24% state they would be motivated to ride more if there were better or different food in the café car. Overall, the majority of respondents are satisfied with San Joaquins service (82%). Respondents are least satisfied by on-time performance (64% satisfied) and the train schedule/frequency (68%).

2.0 BACKGROUND AND PURPOSE

In the spring of 2023, Resource Systems Group (RSG) conducted an Onboard Survey on behalf of the San Joaquin Joint Powers Authority (SJJPA). The goal of the onboard survey was to gain an understanding of current SJJPA riders' travel patterns, recent trip characteristics, customer satisfaction, and demographic profile. The survey aimed to investigate how ridership trends have changed, especially given the intervening COVID pandemic. Recruitment for the survey occurred as an intercept onboard study on San Joaquin trains for nine days, covering 17 trains total. SJJPA riders were given the option to complete the survey as a tablet-based, self-guided online survey. Respondents with less time were handed a postcard that contained a QR code, a survey link, and unique password, which allowed riders to complete the survey at a later point.

Results from the survey can be used to gain insight into the travel patterns and preferences of San Joaquin riders, and how the perception of the services may vary based on demographic and geographic differences.

3.0 ONBOARD SURVEY

3.1 METHODOLOGY

Questionnaire Design

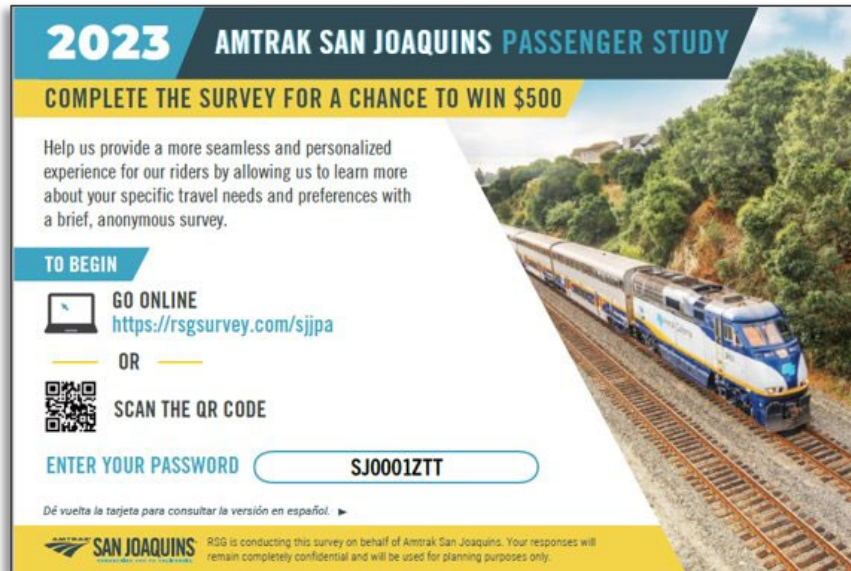
The 2023 SJJPA Onboard Survey was designed to develop a detailed profile of current San Joaquins riders and was based on the 2019 survey to allow for comparisons over time. Some adjustments were made to reflect current events. For instance, questions about San Joaquins usage before the COVID-19 pandemic were added to the travel behavior section. The survey covered the following topics:

1. **Trip details:** The first questions were used to determine where the rider lives and what stations in the San Joaquin corridor their trip started and ended at, as well as their origin and destination. Subsequent questions examined other aspects of the respondent's trip, such as their traveling party size, trip purpose, and nights away.
2. **Station access and egress mode:** These questions examined ways in which the respondent arrived at or departed from a station in the San Joaquin Corridor.
3. **Ticketing:** Respondents were asked what kind of ticket they purchased, where (Amtrak app, travel agent, etc.), and how (cash, credit card, etc.) they purchased the ticket, and if a discount was applied.
4. **Satisfaction:** These questions examined the respondent's attitudes about services aboard the train, such as Wi-Fi and the café car, and reasons for riding.
5. **Travel behavior:** These questions examined how often the respondent utilized the San Joaquins both in 2023 and before the COVID-19 pandemic, and other ways they could travel their route. Respondents were also asked about how interested they would be in potential additions to current services, such as an Amtrak loyalty program.
6. **Demographics:** Respondents were asked to provide demographic information including household income, household size, race, ethnicity, employment, and income.

Survey Programming

The survey was completed online and could be accessed via tablets used by surveyors on the trains, as well as through a QR code printed on postcards distributed to riders. To ensure that each rider could only complete the survey once, each postcard had a unique password. An example of a postcard can be seen in Figure 1. Staff tracked which password ranges were handed out on which trains. Furthermore, both the postcard and the actual online survey were translated into Spanish, making them accessible in either English or Spanish.

FIGURE 1: POSTCARD FOR SAN JOAQUINS ONBOARD STUDY



Branching techniques were employed to present only relevant questions to respondents, avoiding unnecessary inquiries. For example, questions about the café car were only displayed to riders that were on a train with a café. Logic checks were also implemented throughout the survey; for instance, if a rider selected that they are the only member of their household, they were not asked how many children live in the household.

Survey Administration

Surveying took place for nine non-consecutive days between April 12th and April 27th, 2023. RSG Field Managers supervised the field effort and worked alongside three local surveyors provided by Ebony Marketing Systems. On most days, two trains in the same direction were surveyed and intercepted. One to two Field Managers and one to two surveyors rode the full route of each surveyed train, with at least one Field Manager and one surveyor assigned to each train and all staff traveling in the same direction. Seventeen trains total were covered (eight northbound and nine southbound). A detailed schedule of the surveyed trains can be found in Table 3. At the beginning of each shift, the surveyor(s) met the Field Manager(s) at the scheduled station, checked the functionality of the tablet computers, and discussed best practices for intercepting riders. For each selected train, the surveyor(s) and the Field Manager(s) boarded their assigned train with 3-4 tablet computers and a stack of postcards each. Staff recorded each instance where a rider refused the survey so a response rate could be computed. Postcards were given out to riders who did not have sufficient time to complete the survey on the tablet.

Fielding Exception

The surveyors assigned to the 711 train scheduled to depart Bakersfield at 4:12 AM on April 25th 2023 were unable to board due to track maintenance issues at the Bakersfield station. The surveyors and the riders were re-routed by bus provided by the San Joaquins to the Corcoran station where they were able to board a new train. The surveyors successfully boarded at Corcoran, but due to the train switch, there was no café car available. The 711 typically does have a café car, so surveyors entered the train number as 713 instead to prevent the café car questions from showing up on the survey. In data processing, these records were recoded to reflect the 711 train.

Sampling

Over the nine days of surveying, RSG collected 1,406 complete surveys. No responses were removed during data cleaning. Details of the overall sampling effort are shown in Table 2. A detailed breakdown of which specific trains were sampled is shown in Table 3, including the ridership of each train and the number of complete surveys collected. Due to postcard respondents being able to complete the survey at any time following receiving the postcard, three respondents were unable to be matched with a specific train and two respondents were unable to be matched to a specific day, explaining the total sample size of 1,401 (vs. 1,406) in Table 3.

TABLE 2: SAMPLE DETAILS

Description	Count
Total Complete Questionnaires	1,406
Riders Approached Onboard (complete questionnaires + refusals)	1,641
Complete Questionnaires Discarded During Data Processing	0
Valid Questionnaires	1,406
Total Ridership on Sampled Trains	3,651
Valid Response Rate (valid questionnaires / riders approached)	85.7%
Participation Rate (valid questionnaires / total ridership)	39.5%

TABLE 3: SAMPLED TRAINS WITH RIDERSHIP AND COMPLETED SURVEYS

Direction	Train Number	Day Surveyed	Actual Ridership	Station Departure Time	Valid Survey Completes	% Riders Surveyed
Southbound	716	Wed, 4/12	224	OAK 1:36 PM	82	36.6%
Southbound	718	Wed, 4/12	217	OAK 5:36 PM	50	23.0%
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Northbound	719	Thurs, 4/13	139	BFD 4:12 PM	70	50.4%
Southbound	712	Fri, 4/14	180	OAK 9:36 AM	108	60.0%
Southbound	714	Fri, 4/14	158	OAK 11:36 AM	112	70.9%
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Northbound	713	Sun, 4/23	272	BFD 8:12 AM	109	40.1%
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Southbound	710	Mon, 4/24	180	OAK 7:36 AM	78	43.3%
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Northbound	711*	Tues, 4/25	162	BFD 4:12 AM	62	38.3%
Southbound	702	Thurs, 4/27	104	SAC 6:28 AM	78	75.0%
TOTAL			3,561		1,401	

Note: Due to postcard respondents being able to complete the survey at any time following receiving the postcard, 3 respondents were unable to be matched with a specific train and 2 respondents were unable to be matched to a specific day.

Data Cleaning and Processing

The validity of the origin and destination was verified based on the direction of travel, as well as board and alight stop. Access modes were checked against the origin and board stop, and egress modes were checked against the destination and alight stop for inconsistencies. No responses were removed from the dataset.

3.2 WEIGHTING

Data weighting was applied to ensure that the collected sample accurately reflects the San Joaquins traveling population. All records were weighted based on the average daily ridership for each train surveyed at the most disaggregated level possible. Due to sample sizes, weekday train numbers 711 and 713 as well as train numbers 715, 717, and 719, were combined into 2 weighting groups, respectively. Additionally, weekend trains were divided into two separate

weighting groups based on their directions, with all northbound trains forming one group and all southbound trains forming the other group. Altogether, there were 11 distinct weighting groups.

To reflect an average week, weekday ridership was multiplied by 5 and weekend ridership by 2. Weights were calculated by dividing the percent of total average weekly SJJPA ridership by the percent of the sample. Records unable to be assigned to a train number were assigned a weight of 1.

3.3 RESULTS

Rider Profile

Over half of surveyed riders are under the age of 35 (54%) and one-fifth of respondents are over 55. Just over half of the respondents are female (54%). A plurality of respondents identified as white (44%). 5% of respondents (n = 72) took the survey in Spanish.

Three in ten respondents are currently in college or have completed some college, and 42% are currently employed full-time. Respondents are almost uniformly distributed across the size of the households; just over one-fifth of them live alone (23%) and just under one-fifth live in a home with five or more people, though most do not live in a home with children (67%). A plurality of respondents live in single-income homes (36%), have one vehicle for their household (31%), and have annual household incomes less than \$25,000 (32%). Most respondents own a smartphone (85%), or a laptop/tablet (56%), or both.

These demographics are presented in full in Figure 2 through Figure 16.

FIGURE 2. AGE

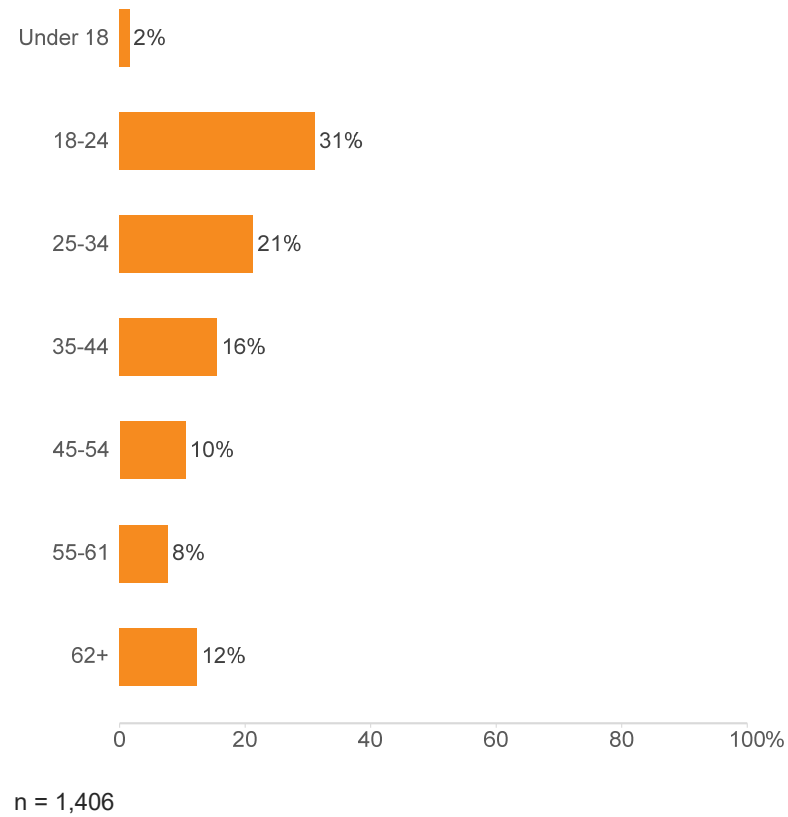
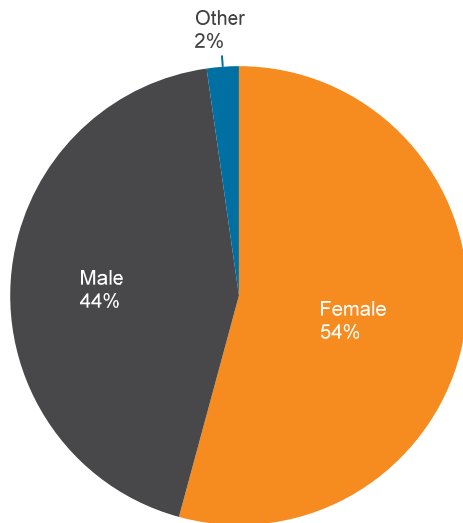
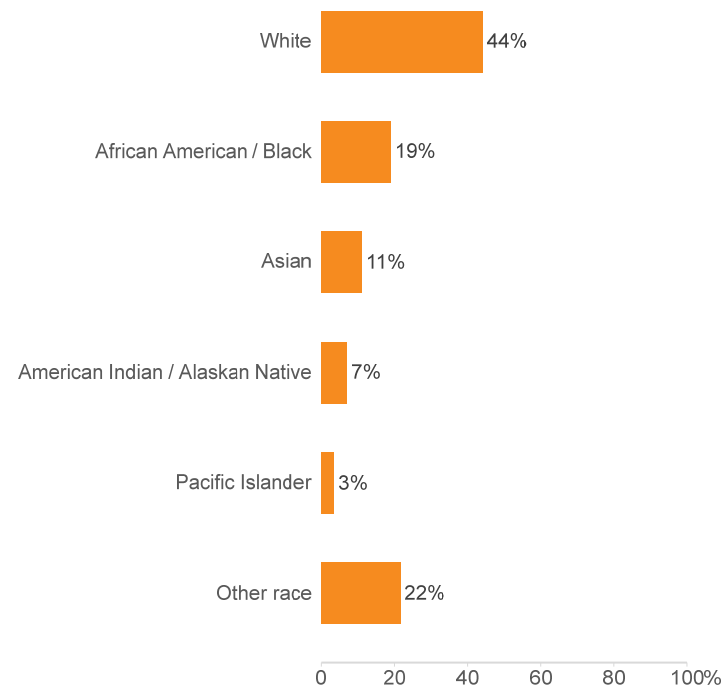


FIGURE 3. GENDER



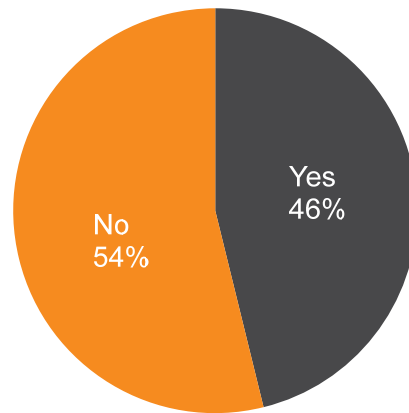
n = 1,406

FIGURE 4. RACE



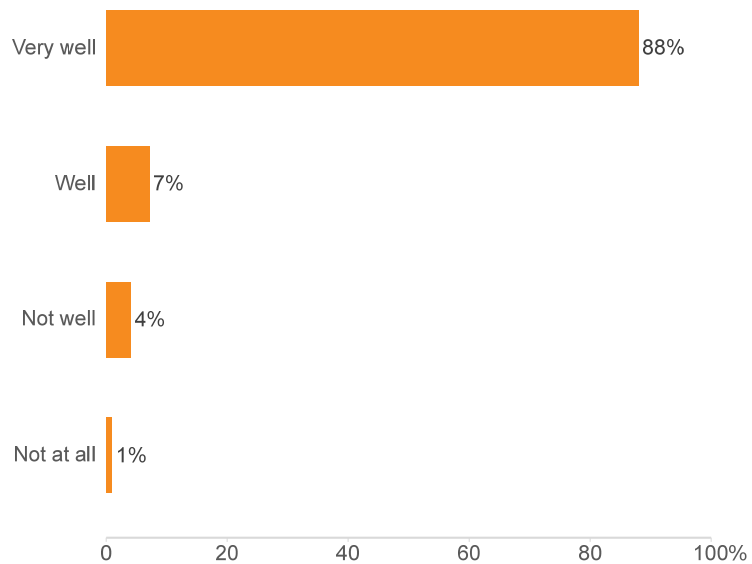
n = 1,406

FIGURE 5: HISPANIC OR LATIN ORIGIN



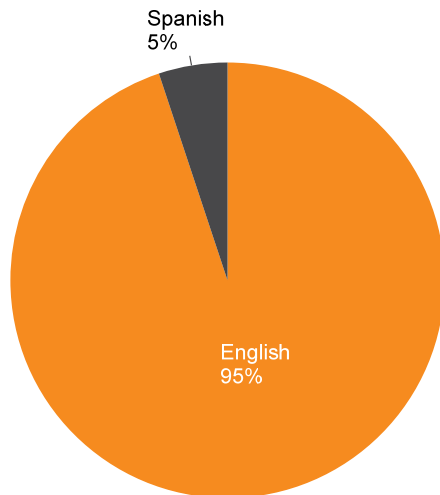
n = 1,406

FIGURE 6: HOW WELL RESPONDENT CAN SPEAK ENGLISH



n = 1,406

FIGURE 7: LANGUAGE SURVEY WAS TAKEN IN



n = 1,406

FIGURE 8: PRIMARY LANGUAGE SPOKEN IN HOUSEHOLD

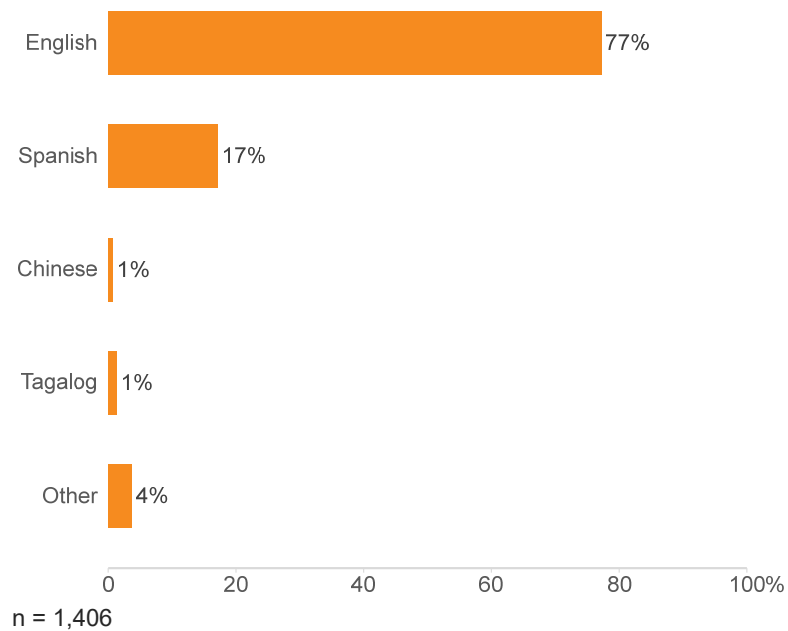


FIGURE 9: EDUCATION

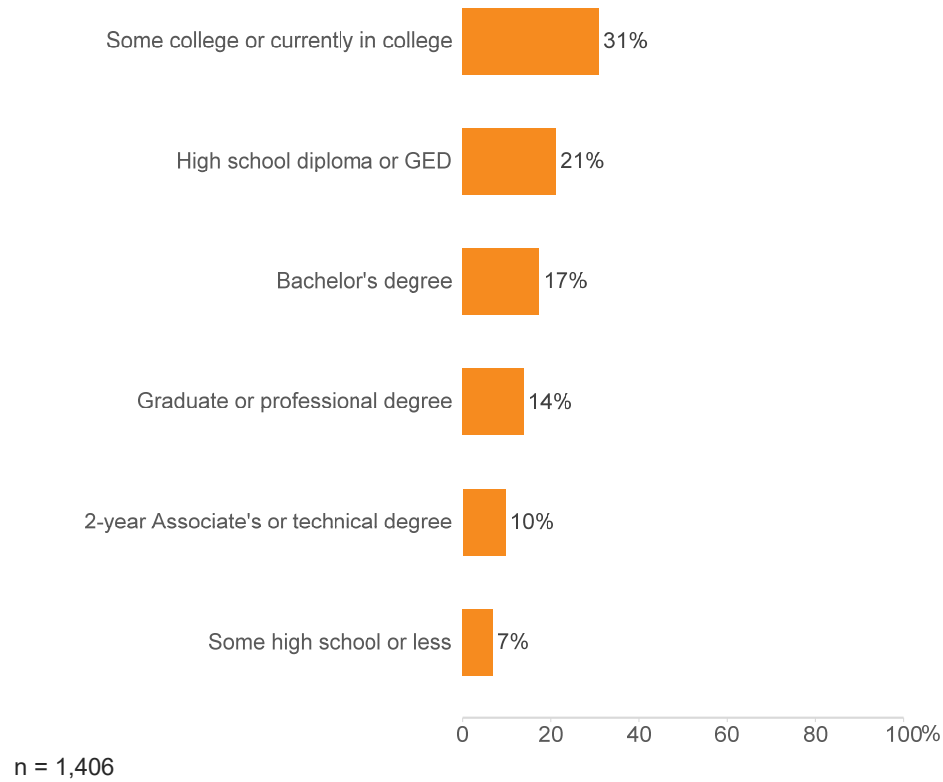


FIGURE 10. EMPLOYMENT STATUS

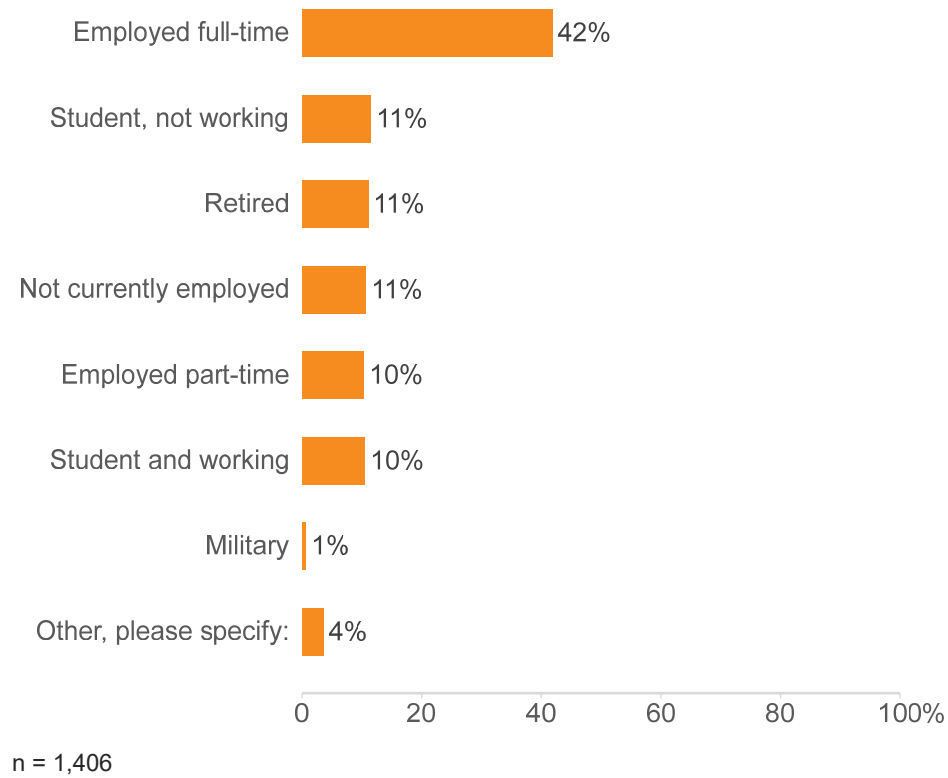


FIGURE 11. HOUSEHOLD SIZE

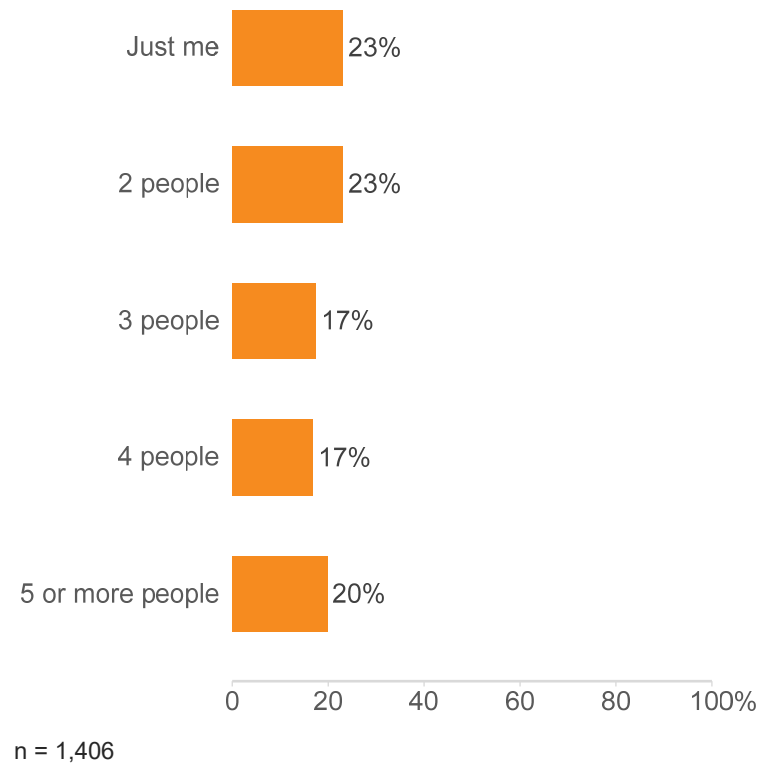


FIGURE 12. CHILDREN IN HOUSEHOLD

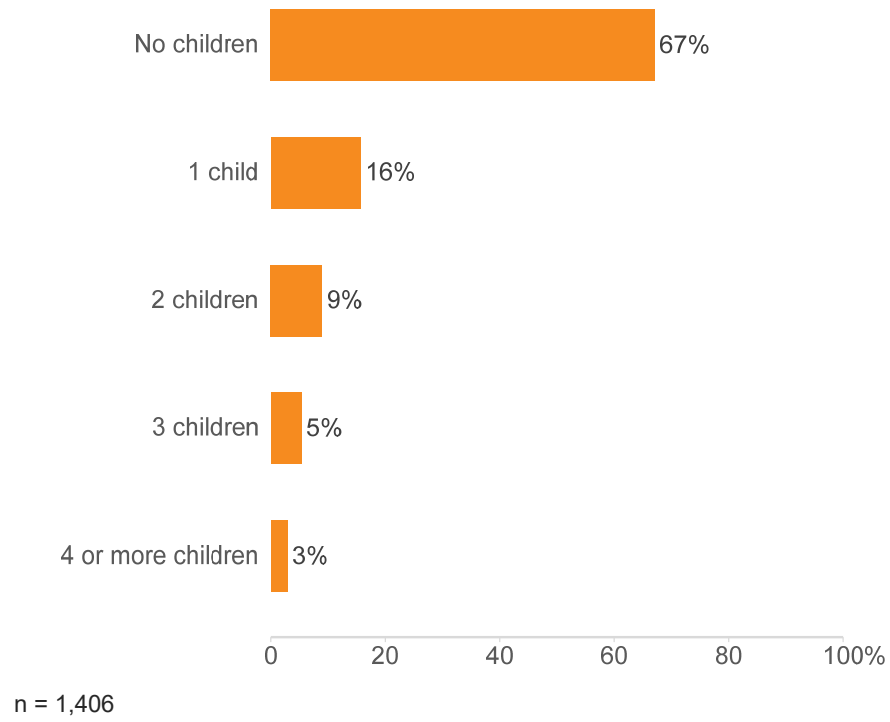


FIGURE 13. HOUSEHOLD EMPLOYED

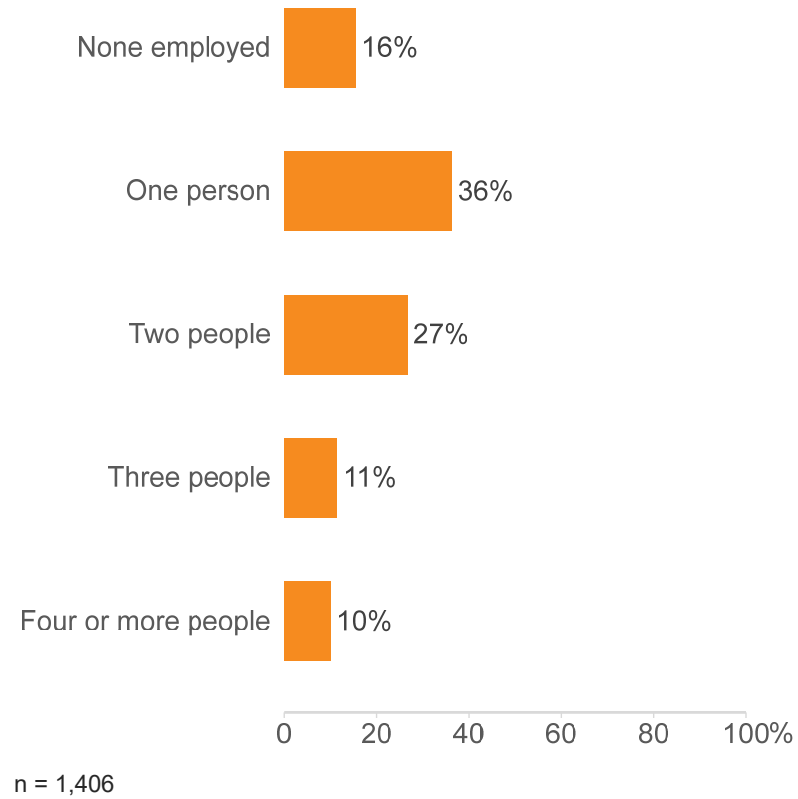


FIGURE 14. HOUSEHOLD VEHICLES

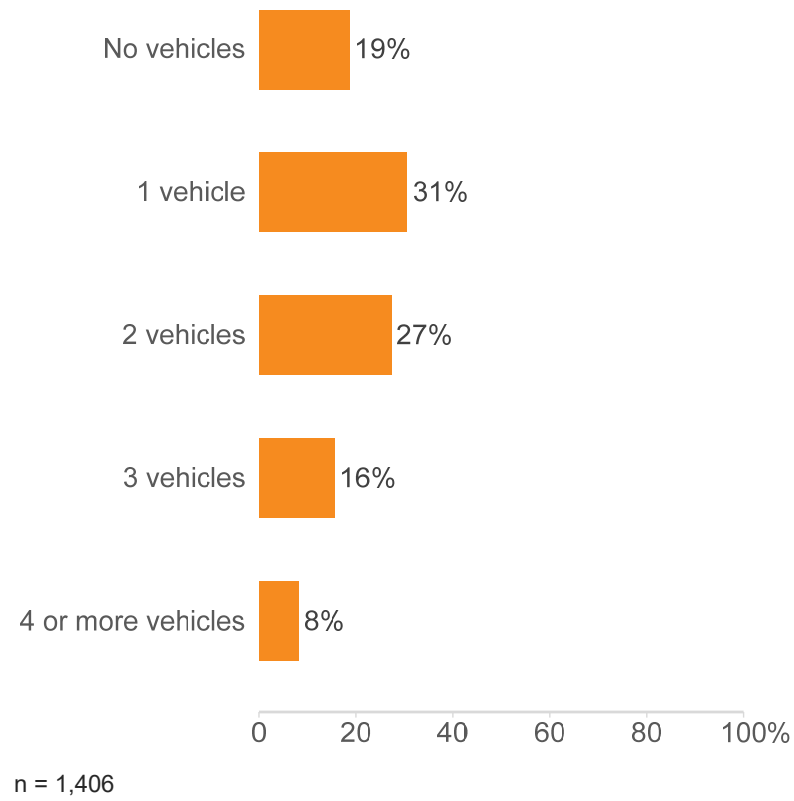
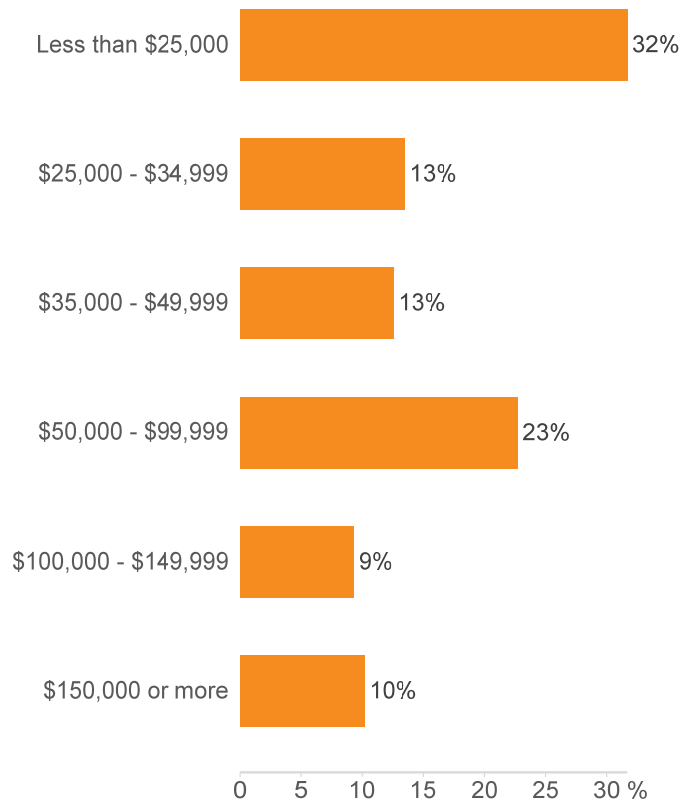
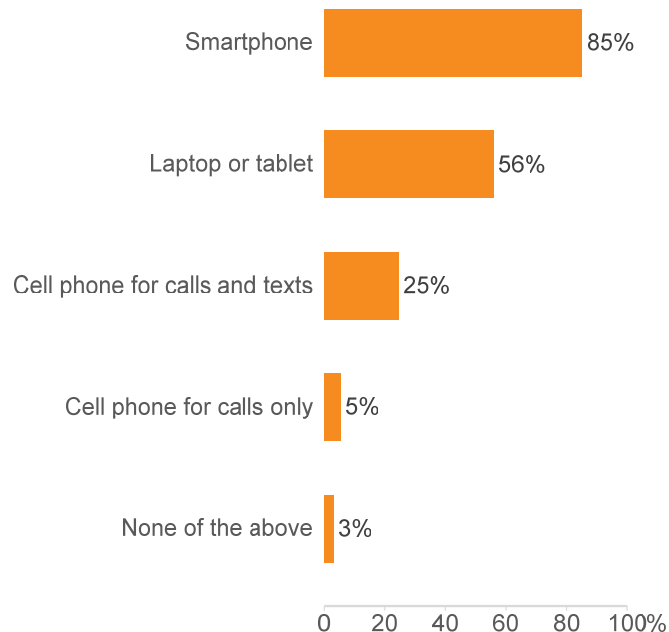


FIGURE 15. HOUSEHOLD INCOME



n = 1,355 (respondent could complete survey without answering this question)

FIGURE 16. WHAT DEVICES DO YOU OWN?

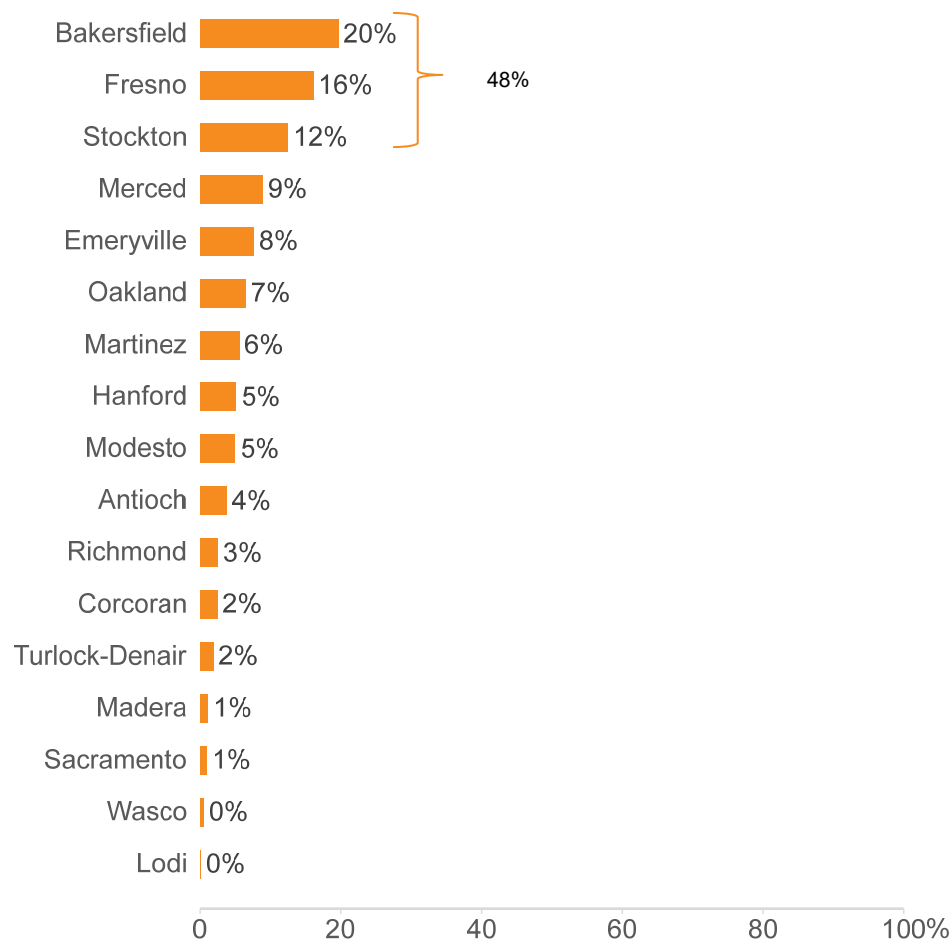
n = 1,406 (respondent could select more than one response)

Intercepted Trip

Boarding, Alighting, Access, and Egress

Bakersfield, Fresno, and Stockton are the most common boarding stations, accounting for 48% of all boardings (see Figure 17). Bakersfield, Fresno, and Stockton are also the most common alighting stations, accounting for 52% of all alightings (Figure 18). About one-fifth of respondents access their San Joaquins boarding station on an Amtrak Thruway Bus (23%, see Figure 19). Among the respondents who access their San Joaquins boarding station on either an Amtrak Thruway Bus or another Amtrak train, 16% access that origin stop/station also on an Amtrak Thruway Motorcoach bus (see Figure 22). Once they alight the San Joaquins train, 2 in 10 respondents reach their final destination on an Amtrak Thruway Bus (20%, see Figure 20). Among those respondents who connect to either an Amtrak Thruway Bus or another Amtrak train after alighting the San Joaquins, 10% reach their final destination on an Amtrak Thruway Motorcoach bus, which is up four percentage points since 2019 (see Figure 23). In total, 39% of San Joaquins riders use an Amtrak Thruway Bus, either to access the San Joaquins train, to egress to their final destination, or both (see Figure 21).

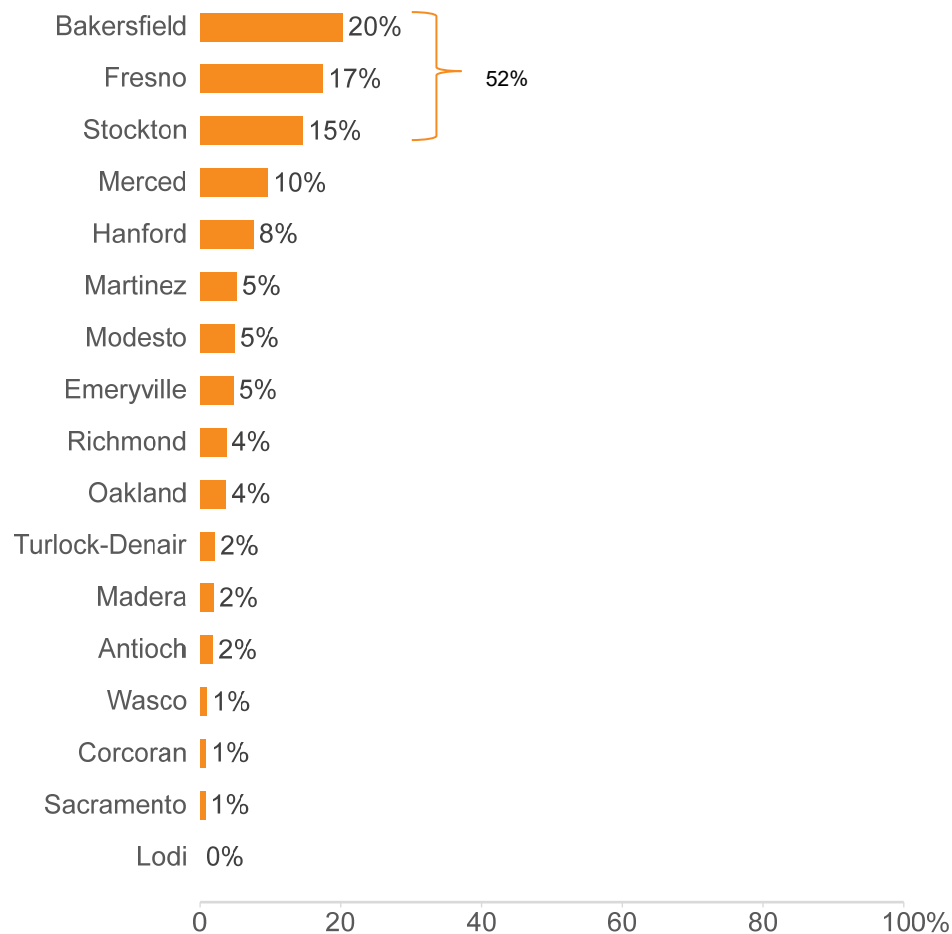
FIGURE 17: SAN JOAQUINS BOARDING STATIONS



n = 1,378

Note: Boarding stations only include train stations along the SJJPA train route and exclude stops on the Amtrak Thruway Bus system.

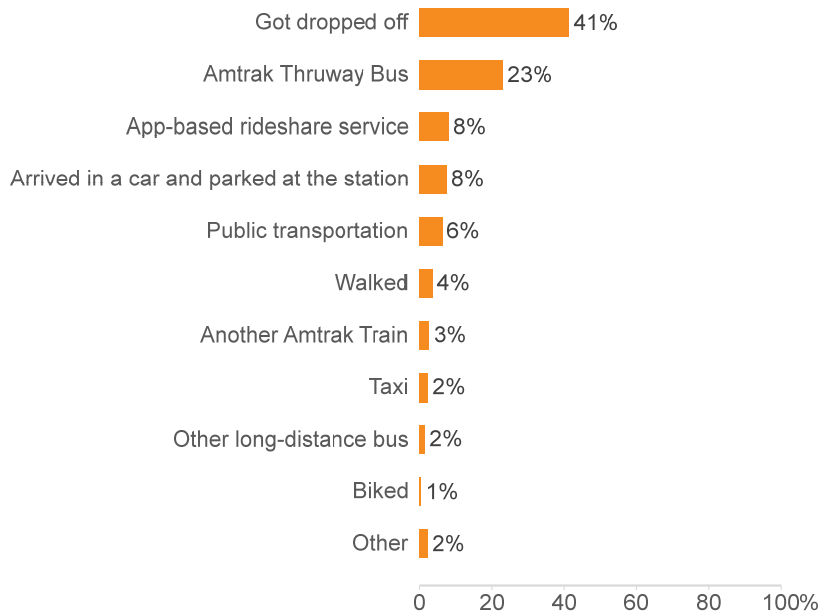
FIGURE 18. SAN JOAQUINS ALIGHTING STATIONS



n = 1,366

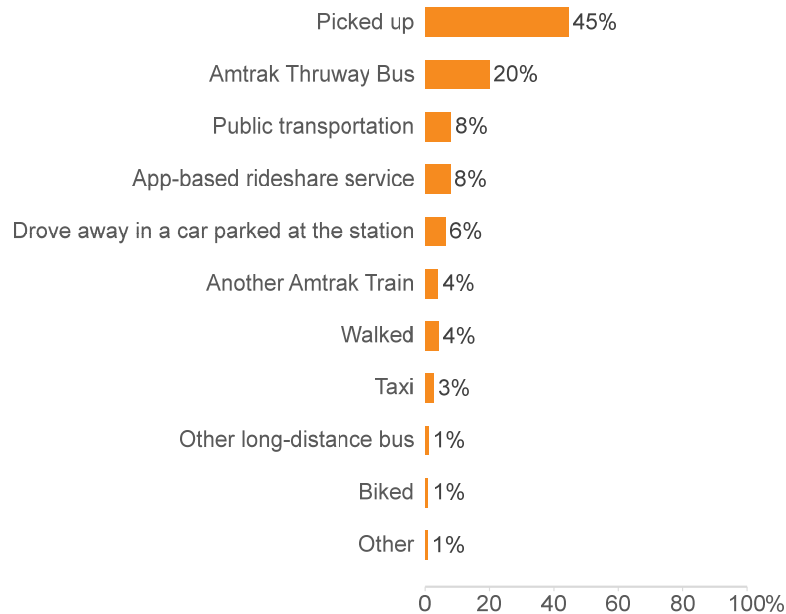
Note: Alighting stations only include train stations along the SJJPA train route and exclude stops on the Amtrak Thruway Bus system.

FIGURE 19. ACCESS MODE TO SAN JOAQUINS BOARDING STATION



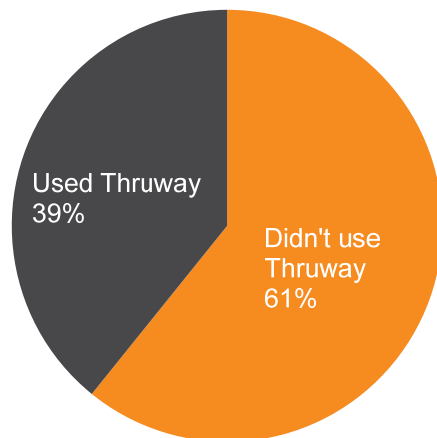
n = 1,384

FIGURE 20. EGRESS MODE FROM SAN JOAQUINS STATION



n = 1,384

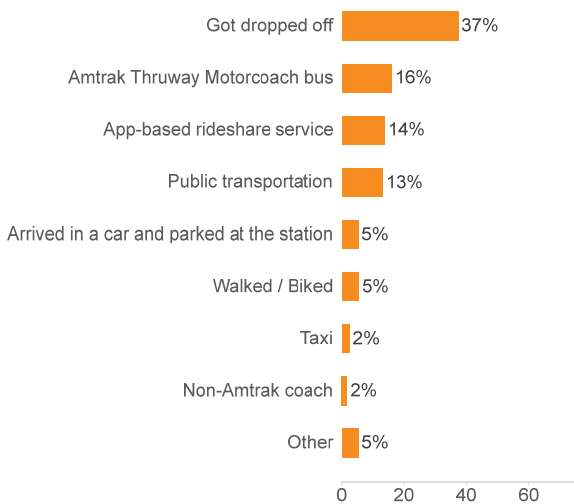
FIGURE 21: USED THRUWAY BUS AS PART OF SAN JOAQUINS TRAIN TRIP



n = 1,384

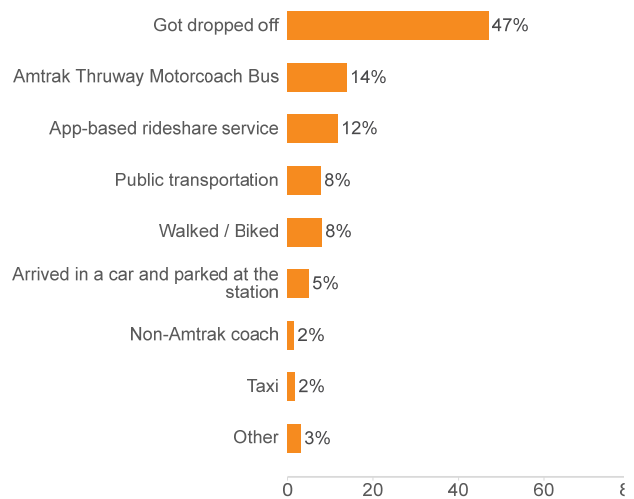
FIGURE 22. ACCESS MODE TO CONNECTING STOP/STATION FOR AMTRAK THRUWAY BUS OR TRAIN

2023 Access Mode to Connecting Stop/Station

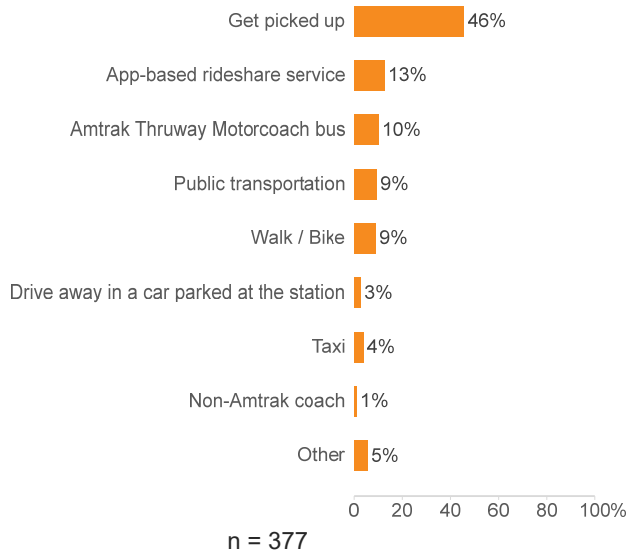
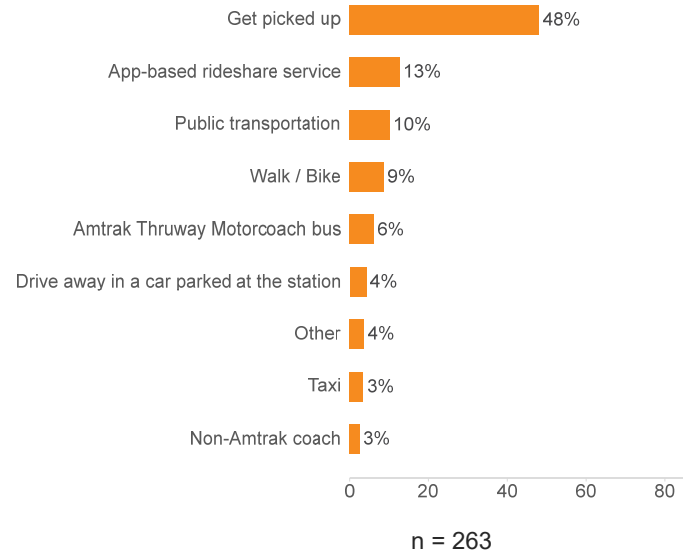


n = 370 (only includes respondents that connect to Amtrak Thruway bus/train)

2019 Access Mode to Connecting Stop/Station



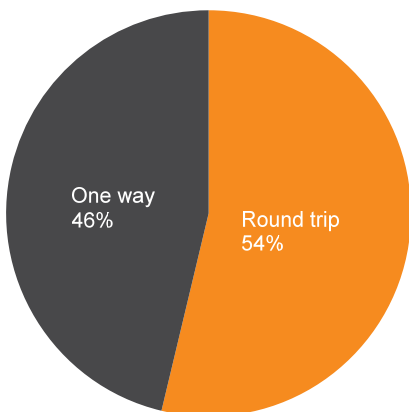
n = 294 (only includes respondents that connect to another Amtrak Thruway bus/train)

FIGURE 23. EGRESS MODE FROM CONNECTING STOP/STATION FOR AMTRAK THRUWAY BUS OR TRAIN*2023 Egress Mode from Connecting Stop/Station**2019 Egress Mode from Connecting Stop/Station***Trip Purpose and Details**

More than half of respondents' trips are roundtrips on the San Joaquins (54%, Figure 24), but do not include an overnight stay (56%, see Figure 25). Most respondents travel either to visit family or friends or for leisure/vacation (66%, see Figure 27). However, leisure and vacation travel decreased by 14 percentage points between 2019 and 2023 (see Figure 27). More respondents report using the San Joaquins for a day trip rather than a trip that includes an overnight stay, compared to 2019. As Figure 28 demonstrates, three-quarters of respondents travel alone.

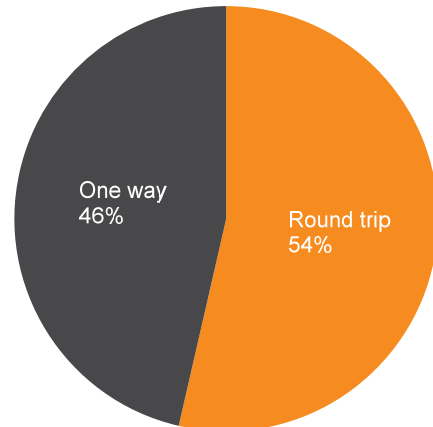
FIGURE 24. ONE WAY VS. ROUND TRIP TRAVEL ON SAN JOAQUINS

2023 Round Trip or One Way



n = 1,406

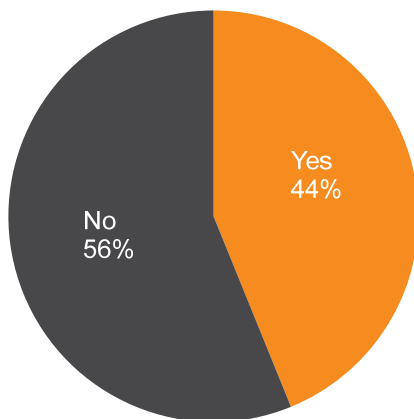
2019 Round Trip or One Way



n = 1,131

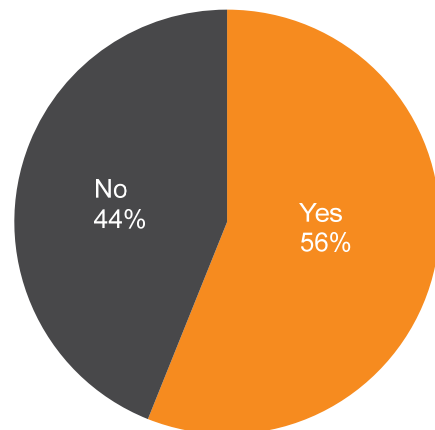
FIGURE 25. TRIP INCLUDES AN OVERNIGHT STAY

2023 Trip Includes an Overnight Stay



n = 1,406

2019 Trip Includes an Overnight Stay



n = 1,131

FIGURE 26. NUMBER OF NIGHTS AWAY

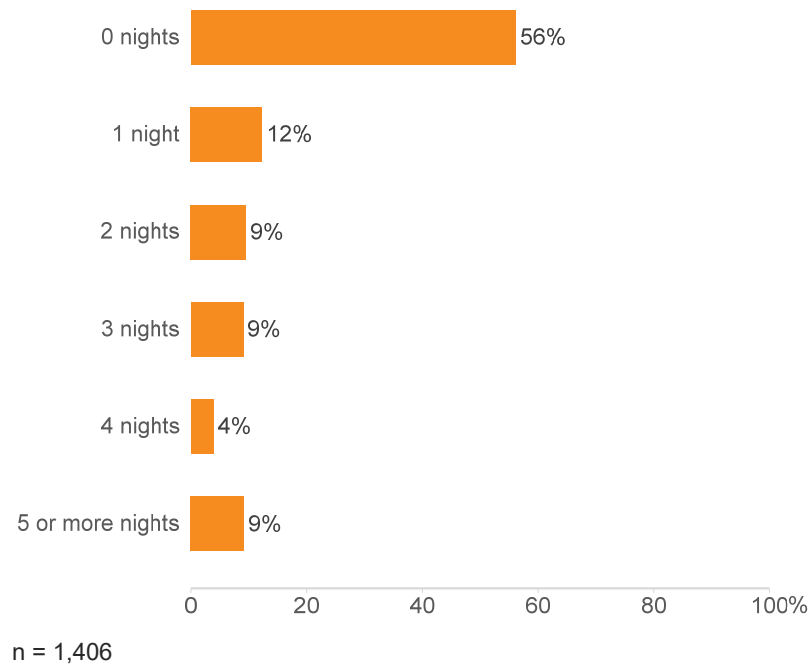


FIGURE 27. TRIP PURPOSE

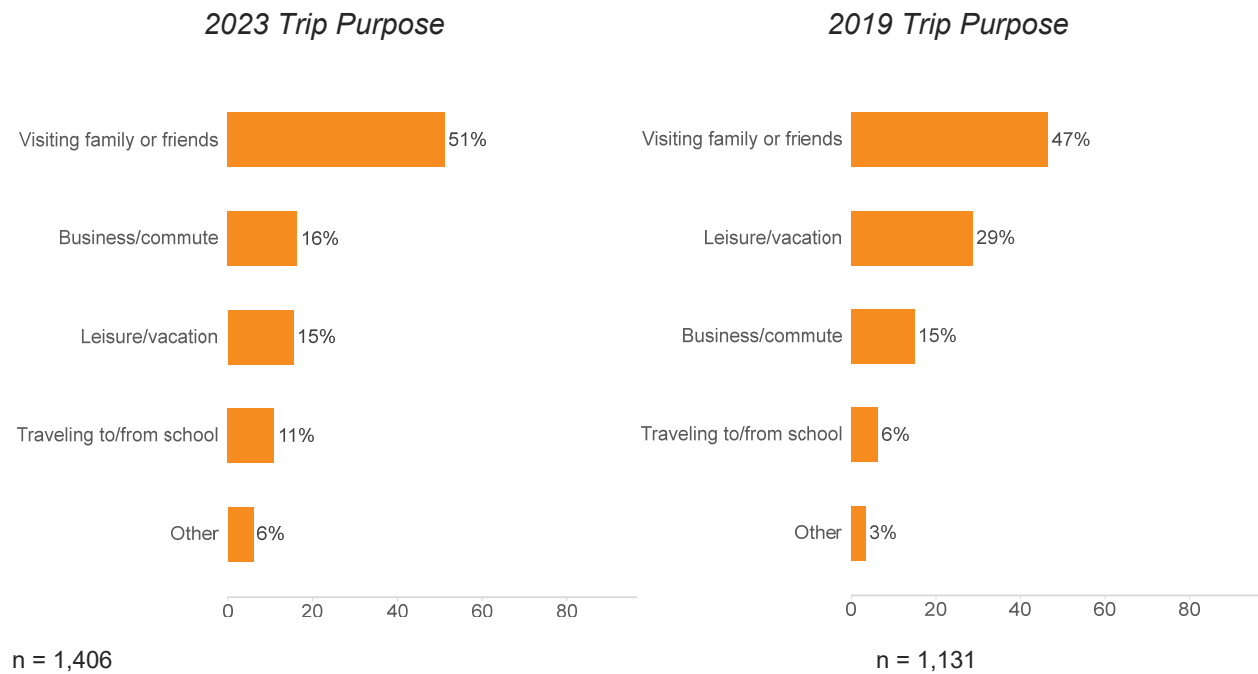
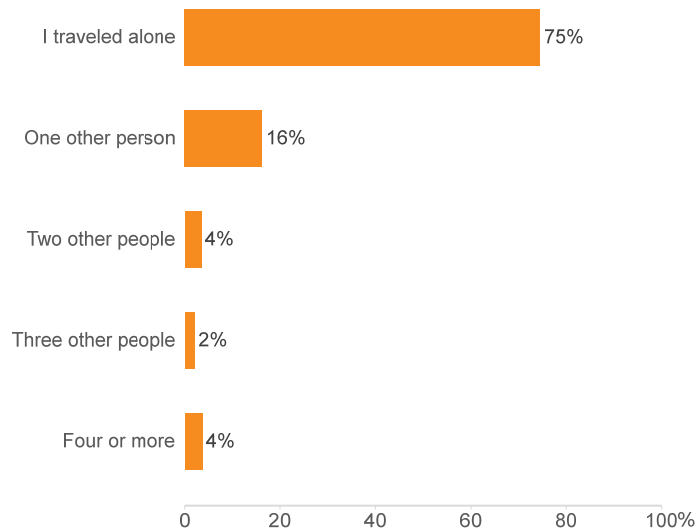


FIGURE 28. PARTY SIZE



n = 1,406

Ticketing

Six out of 10 respondents purchase a one-way ticket on the San Joaquins (see Figure 29). Half of respondents (49%) purchase their ticket online, and compared to 2019, almost twice as many respondents purchase their tickets using Amtrak for mobile (see Figure 30). Three-fourths of respondents do not use any discount when purchasing their ticket (see Figure 32). Among those who do, the most common discounts are senior discounts and student discounts (8% each).

FIGURE 29. TICKET TYPE

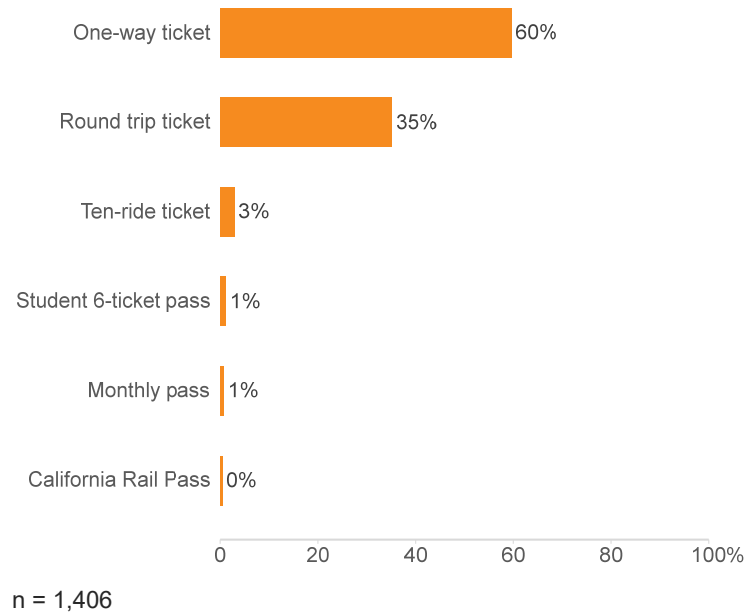


FIGURE 30. TICKET PURCHASE

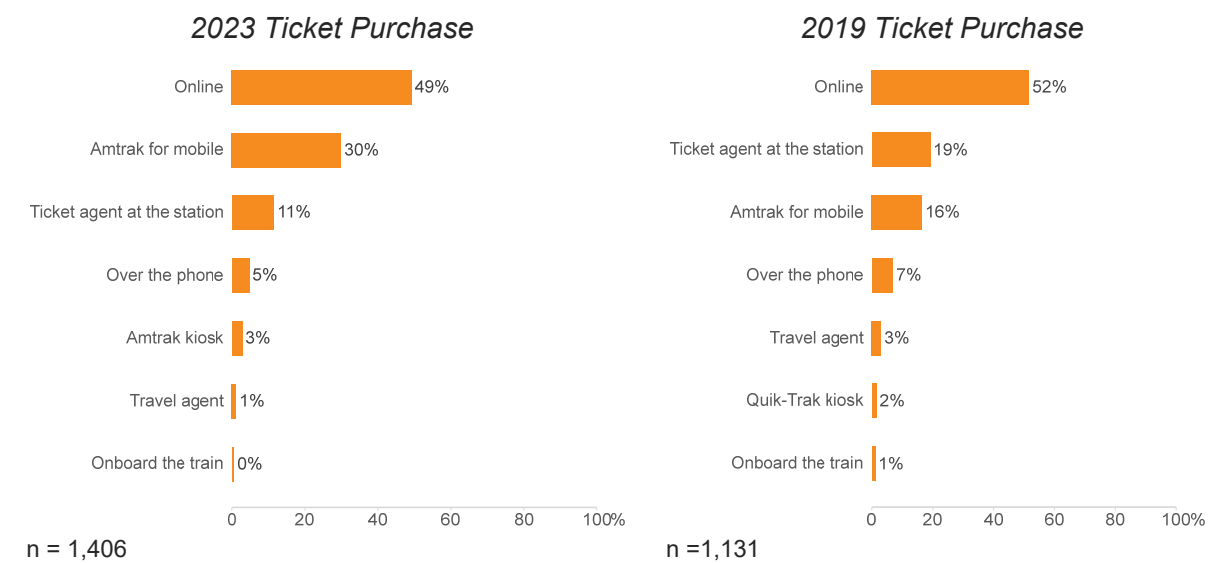
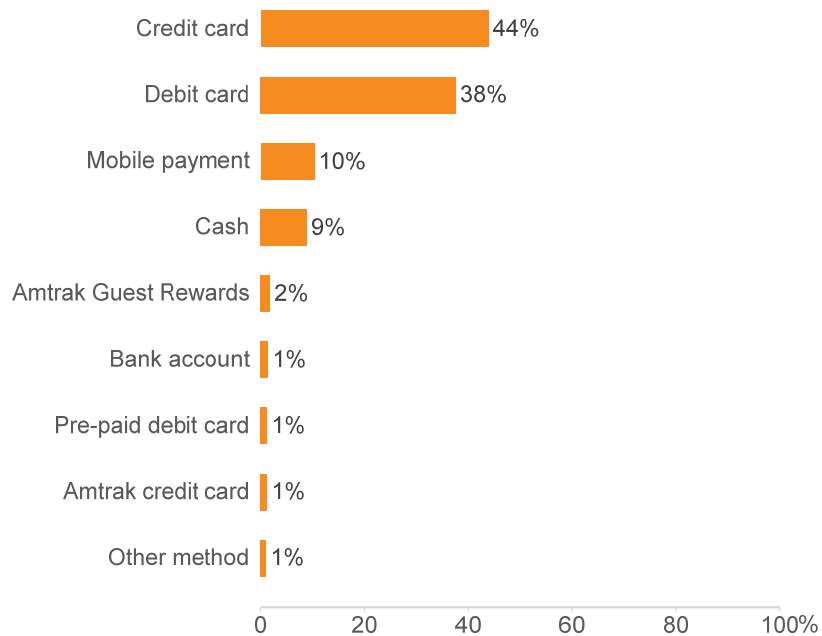
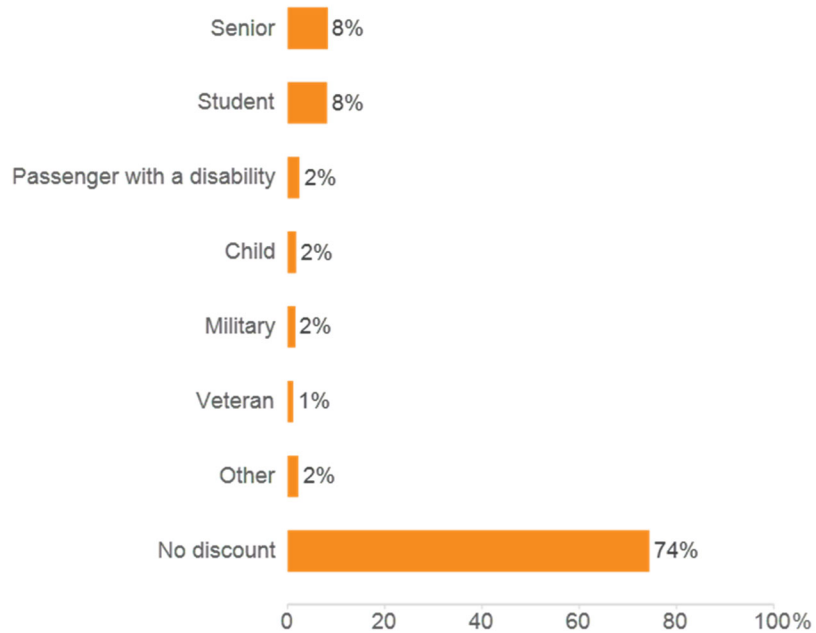


FIGURE 31. HOW TICKET WAS PURCHASED



n = 1,406

FIGURE 32. FARE DISCOUNT USED



n = 1,406

San Joaquins Travel

More than one in ten respondents ride the San Joaquins at least once per week (14%), seven in ten respondents ride the San Joaquins more than once per year, and since 2019, ridership has become more frequent (see Figure 33). Less than half of respondents (48%) say they rode the San Joaquins prior to the COVID-19 pandemic, but of those respondents, 18% rode at least once per week (see Figure 34). Six out of 10 of respondents (59%) plan their trip with either a train website (e.g., Amtrak.com) or the Amtrak mobile app (see Figure 35).

FIGURE 33. FREQUENCY OF TRAVEL ON SAN JOAQUINS

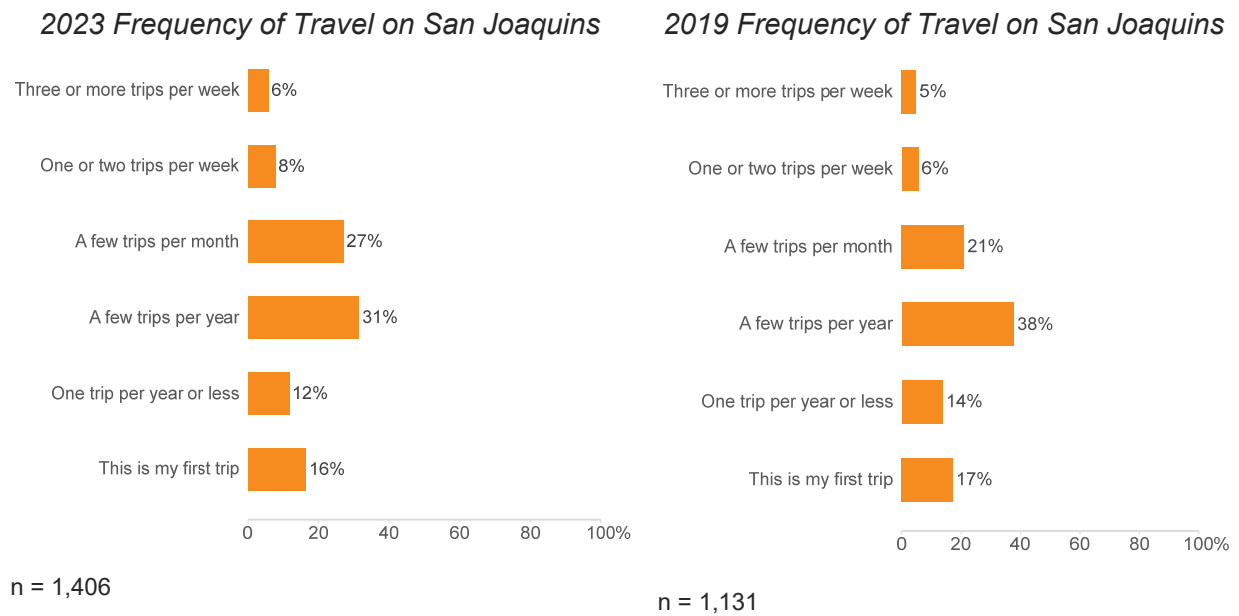


FIGURE 34. FREQUENCY OF SAN JOAQUINS USE PRE-COVID

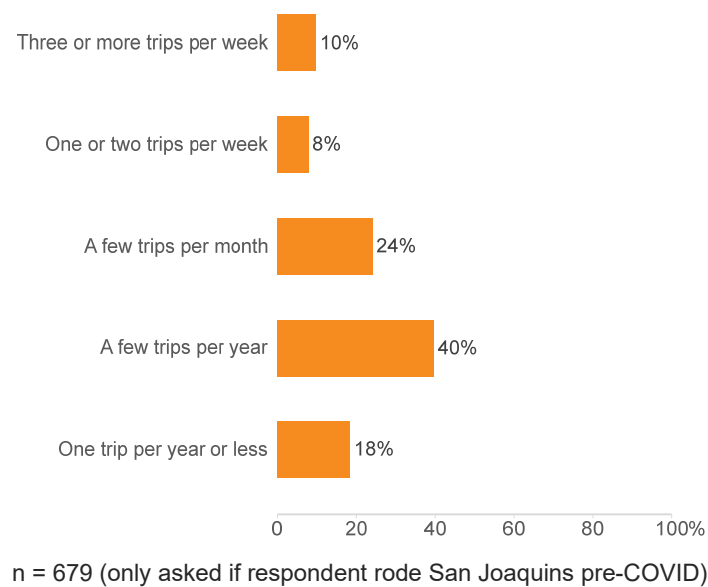
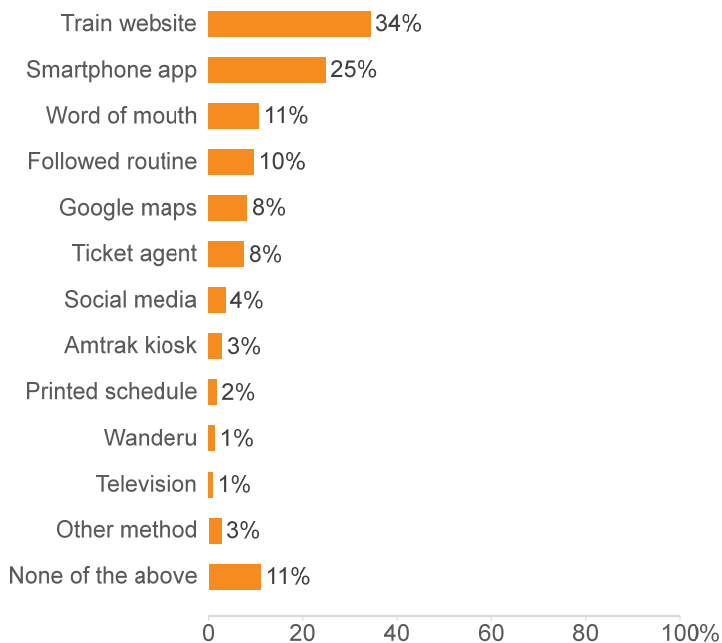


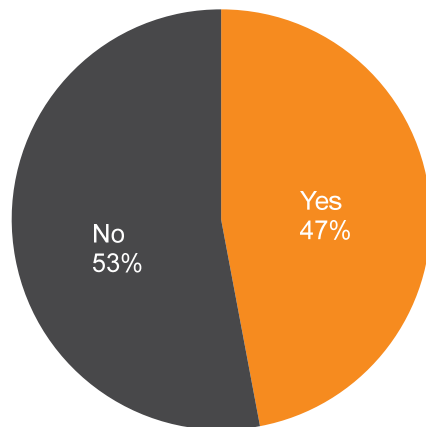
FIGURE 35. INFORMATION SOURCE TO PLAN TRIP ON SAN JOAQUINS

n = 1,406

Rewards Members and Business Class

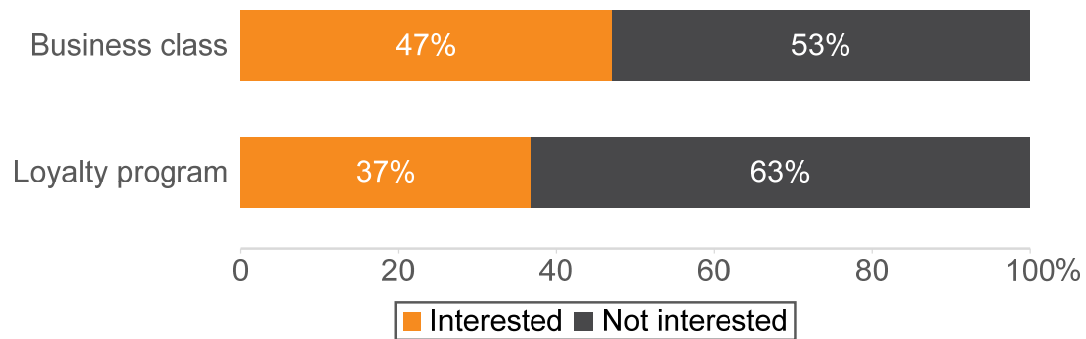
Nearly half of respondents are Amtrak Guest Rewards Members (47%, see Figure 36), and 37% express an interest in a SJJPA loyalty program (see Figure 37). Nearly half of respondents express an interest in business class amenities on the San Joaquins (47%, see Figure 37). The most requested feature of business class is free beverages (53%, see Figure 38). Half of respondents say they would pay at least ten dollars more for a ticket to sit in business class (see Figure 39).

FIGURE 36. IS AN AMTRAK GUEST REWARDS MEMBER



n = 1,406

FIGURE 37. INTEREST IN...



n = 1,406

FIGURE 38. DESIRED FEATURES IN BUSINESS CLASS

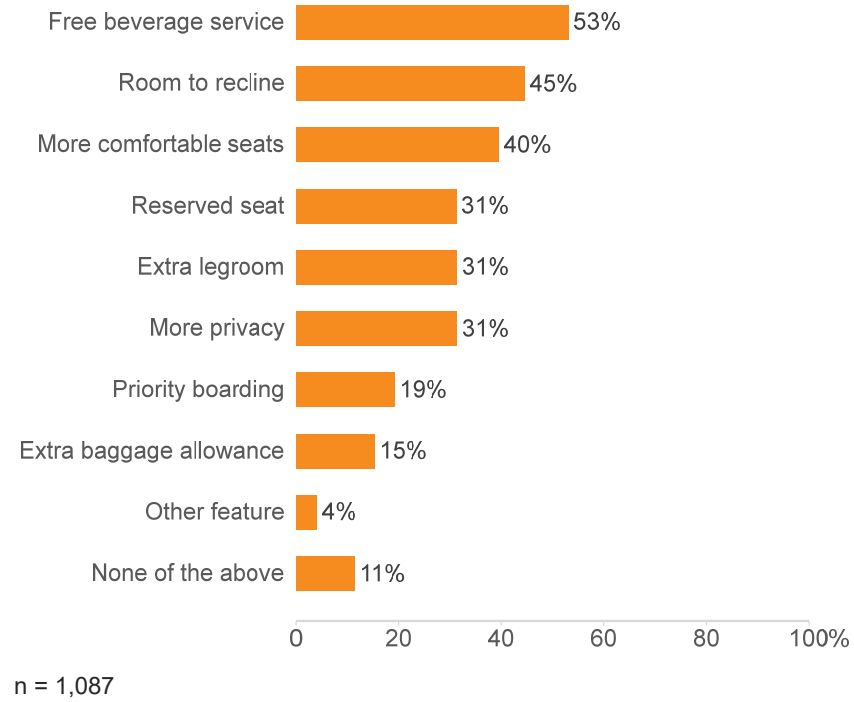
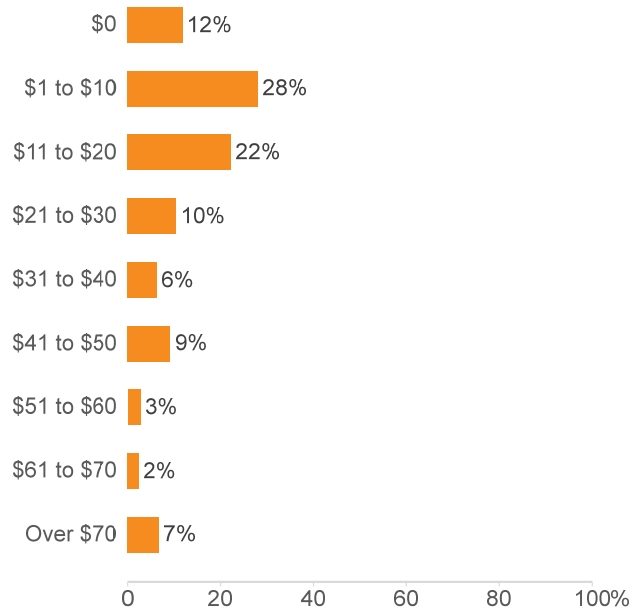


FIGURE 39. ADDITIONAL AMOUNT RESPONDENTS ARE WILLING TO PAY FOR BUSINESS CLASS

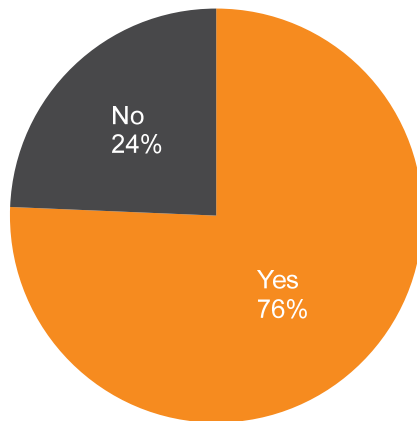
n = 1,087

Onboard Amenities

More than three-quarters (76%) of respondents say they are aware of the Wi-Fi availability on the San Joaquins (see Figure 40). Of those who are aware of the Wi-Fi, three-fifths (61%) use this service (see Figure 41). Of those that use onboard Wi-Fi only one-fourth (24%) used the provided free content (see Figure 42).

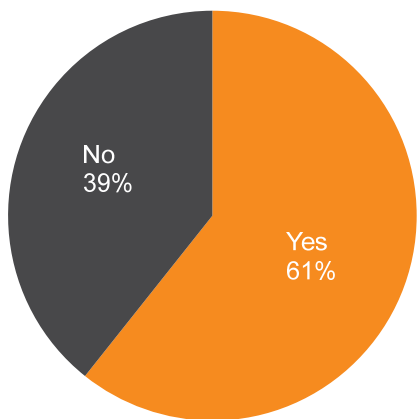
More than four in five (84%) respondents are aware of the café car on trains where this service is available (see Figure 43). Of the respondents who are aware of the café car, 4 in 10 respondents visit the car (see Figure 44), and nearly all (90%) respondents who visit the café car make a purchase (see Figure 45). A plurality of respondents (28%) say they would be disappointed if the café car were replaced with vending machines, but nearly as many respondents (27%) say they would prefer lower fares to the café car (see Figure 46).

FIGURE 40. WI-FI AWARENESS



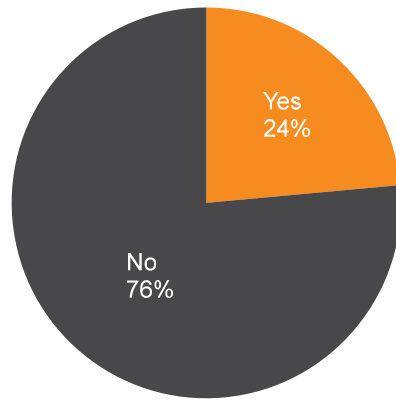
n = 1,406

FIGURE 41. USE WI-FI DURING THIS TRIP



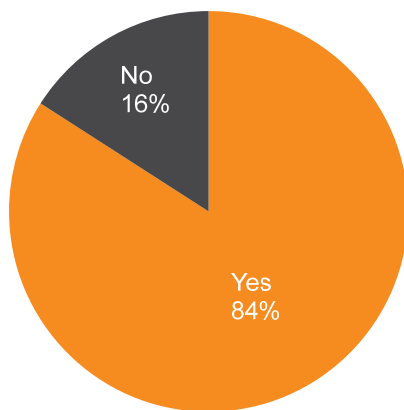
n = 1,060 (only respondents who were aware of Wi-Fi onboard)

FIGURE 42. USED FREE CONTENT INCLUDED WITH WI-FI



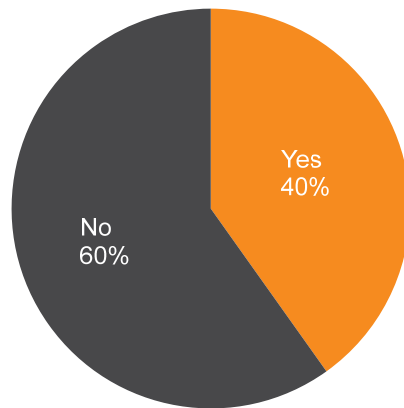
n = 655 (only respondents who used Wi-Fi)

FIGURE 43. AWARE OF CAFÉ CAR



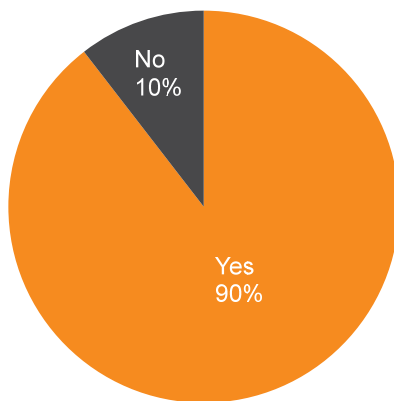
n = 1,230 (only respondents on trains with café car)

FIGURE 44. VISITED CAFÉ

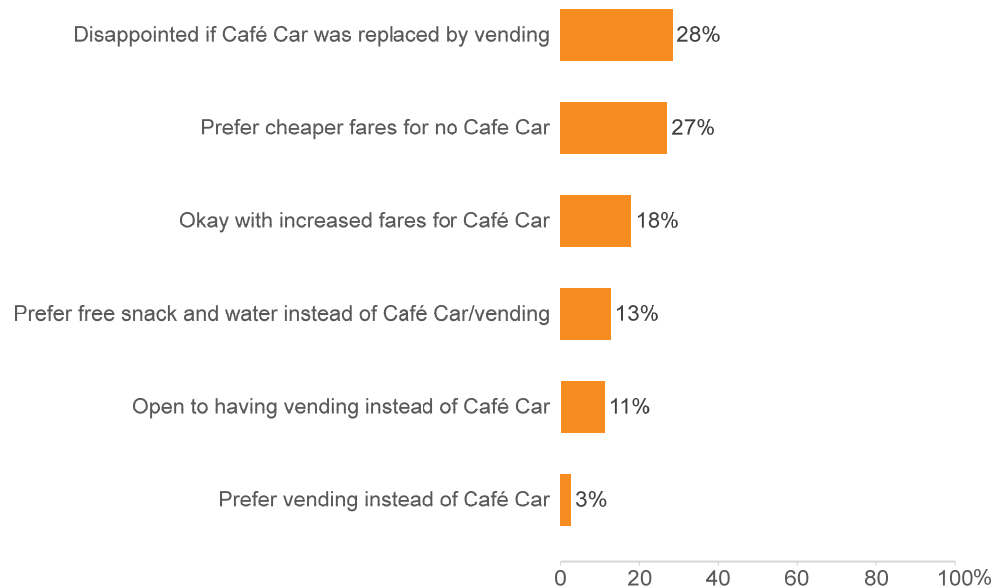


n = 1,037 (only respondents aware of café)

FIGURE 45. MADE CAFE PURCHASE



n = 429 (only respondents who visited café car)

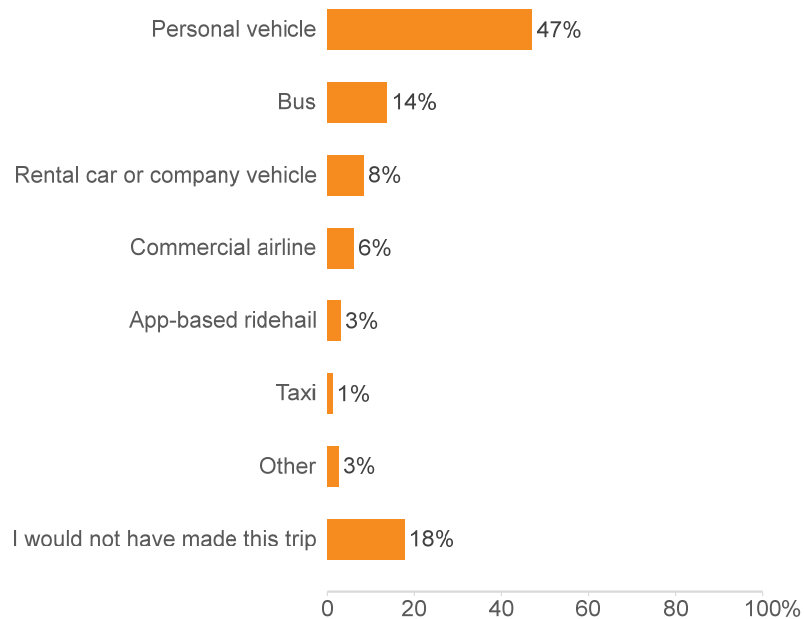
FIGURE 46. STATEMENTS RESONATING MOST

n = 1,230 (only respondents on trains with café cars)

Reasons for Riding and Preferred Alternatives

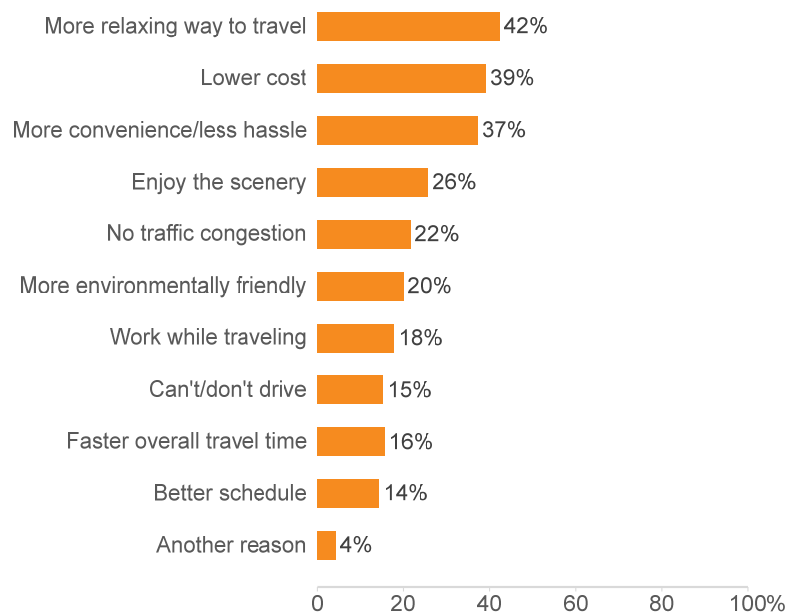
If the San Joaquins were not available, just under half of respondents (47%) would use a personal vehicle to make their trip, and nearly one-fifth of respondents (18%) would not make their trip without the San Joaquins (see Figure 47). The top three reasons respondents who have an alternative mode of transport available choose to use the San Joaquins are to have a more relaxing mode of transport than alternatives (42%), the lower cost (39%), and the convenience (37%, see Figure 48). More than two-fifths of respondents (42%) say they would use the San Joaquins more frequently if fares were cheaper (see Figure 49).

FIGURE 47. ALTERNATIVE MODE OF TRAVEL, SAN JOAQUINS NOT AVAILABLE FOR TRIP



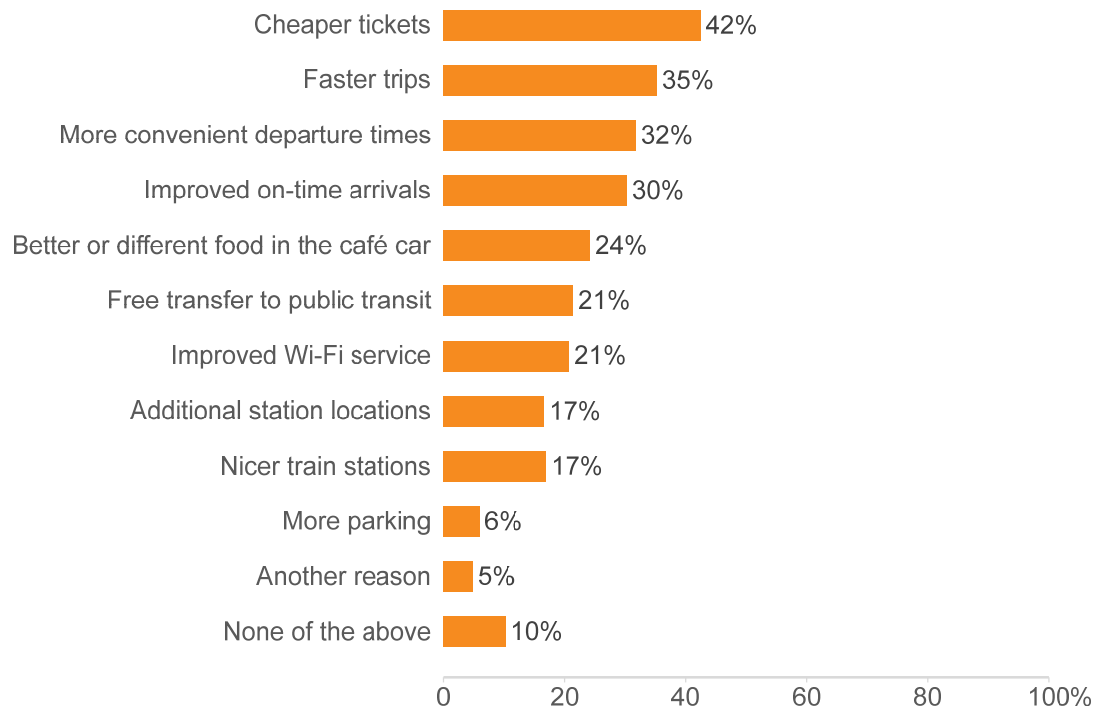
n = 1,406

FIGURE 48. REASON FOR CHOOSING SAN JOAQUINS OVER OTHER OPTIONS



n = 773 to 1,155 (respondents who had an alternative)

FIGURE 49. MOTIVATION TO RIDE SAN JOAQUINS MORE OFTEN

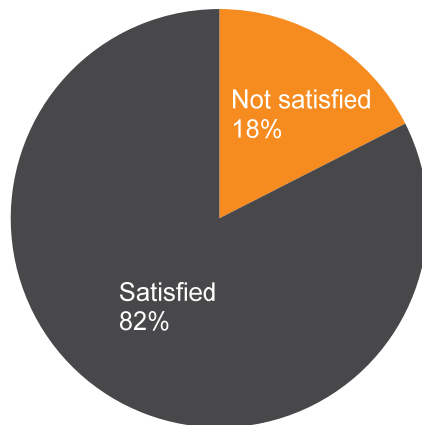


n = 1,406

San Joaquins Experience

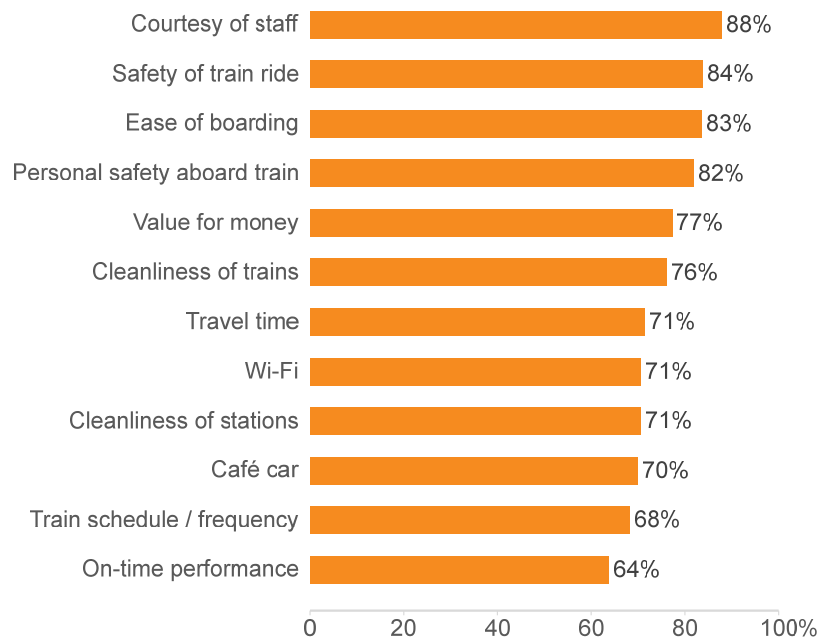
More than 8 out of 10 respondents (82%) say they are very satisfied or somewhat satisfied with the overall service on the San Joaquins (see Figure 50). While a majority of respondents report being satisfied with all service attributes on the San Joaquins, they are most satisfied with the courtesy of the staff (88%) and least with the on-time performance of the train (64%, see Figure 51).

FIGURE 50. OVERALL SATISFACTION WITH SAN JOAQUINS SERVICE



n = 1,406

FIGURE 51. SATISFACTION WITH SERVICE ATTRIBUTES (TOP 2) “VERY SATISFIED” AND “SOMEWHAT SATISFIED”



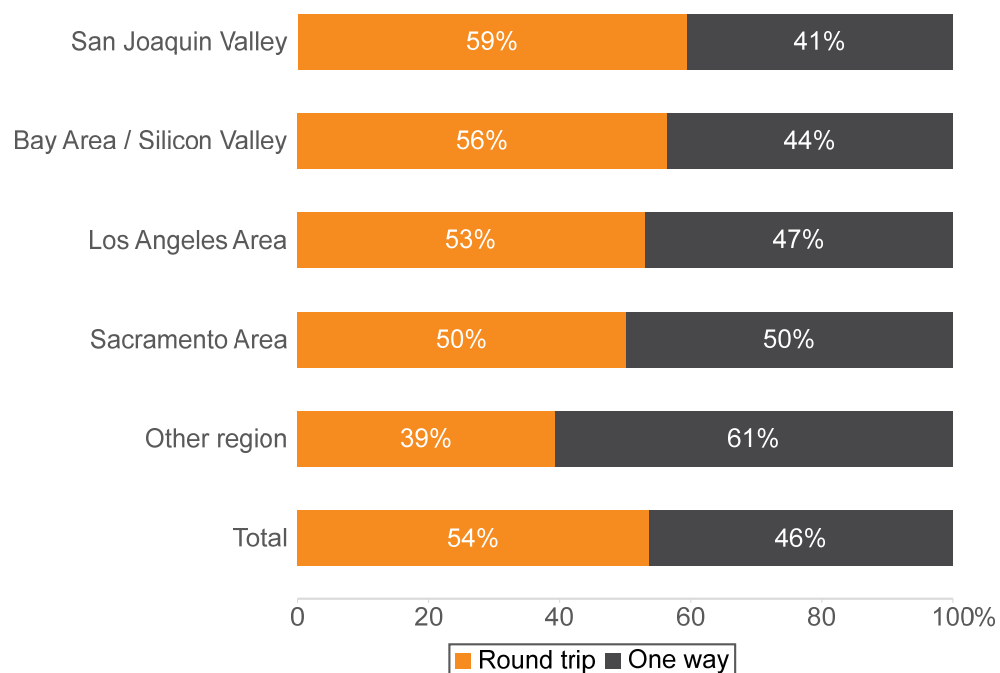
n = 1,003 to 1,386

Select Crosstabs

By Home Region

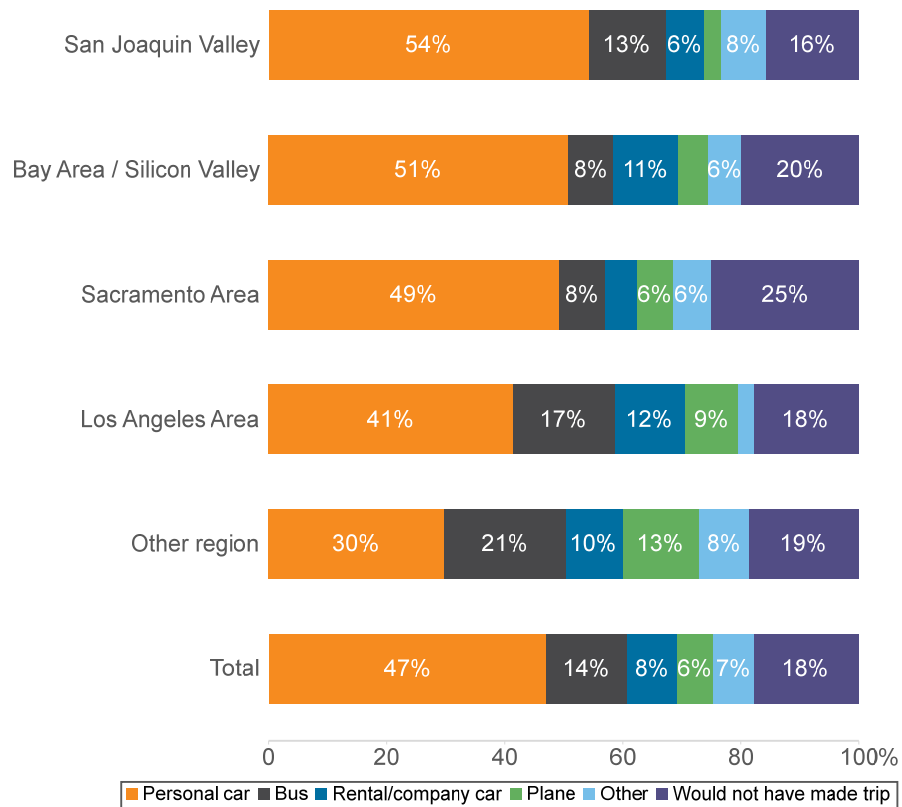
Nearly six in ten respondents that live in the San Joaquin Valley traveled round-trip when they were intercepted (59%), compared to five in ten (50%) for those residing in the Sacramento area (see Figure 52). The majority of respondents in any region would take their personal vehicle if the San Joaquins were not available (47% overall), but more so for San Joaquin Valley residents (54%) than for Los Angeles residents (41%), implying that the San Joaquins train is more directly competing with the car among San Joaquin residents compared to LA residents. A quarter of those from Sacramento would not have made the trip at all without San Joaquins service (25%, see Figure 53).

FIGURE 52: ROUND TRIP OR ONE WAY INTERCEPTED TRIP BY HOME REGION



n = 1,406

FIGURE 53: ALTERNATIVE TRAVEL METHOD BY HOME REGION

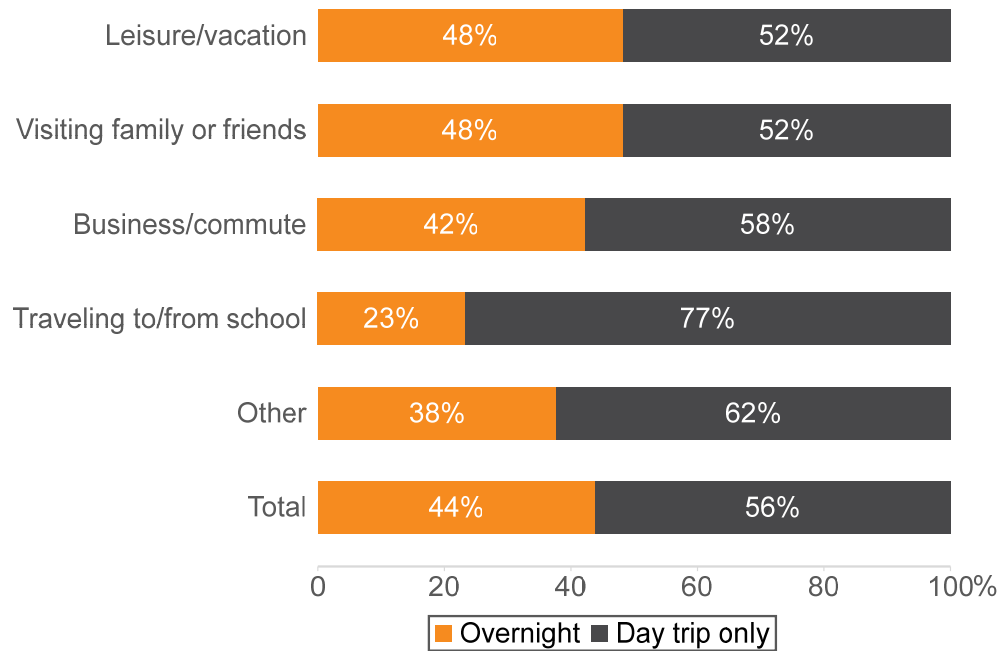


n = 1,406

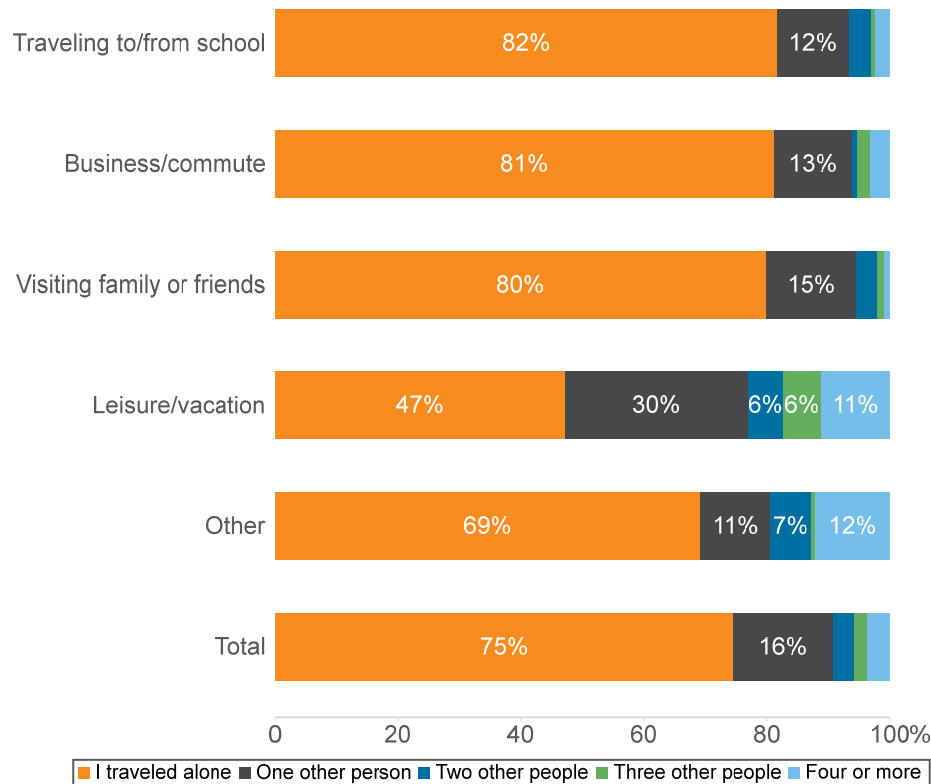
By Trip Purpose

Significantly fewer respondents traveling for the purpose of commuting to school reported that they are riding the San Joaquins for an overnight trip (23%), compared to all other trip purposes (see Figure 54). About four-fifths of respondents commuting for work, school, or to visit friends or family made their trip alone, compared to less than half of those traveling for leisure (47%, see Figure 55).

FIGURE 54: TRIP LENGTH BY TRIP PURPOSE



n = 1,406

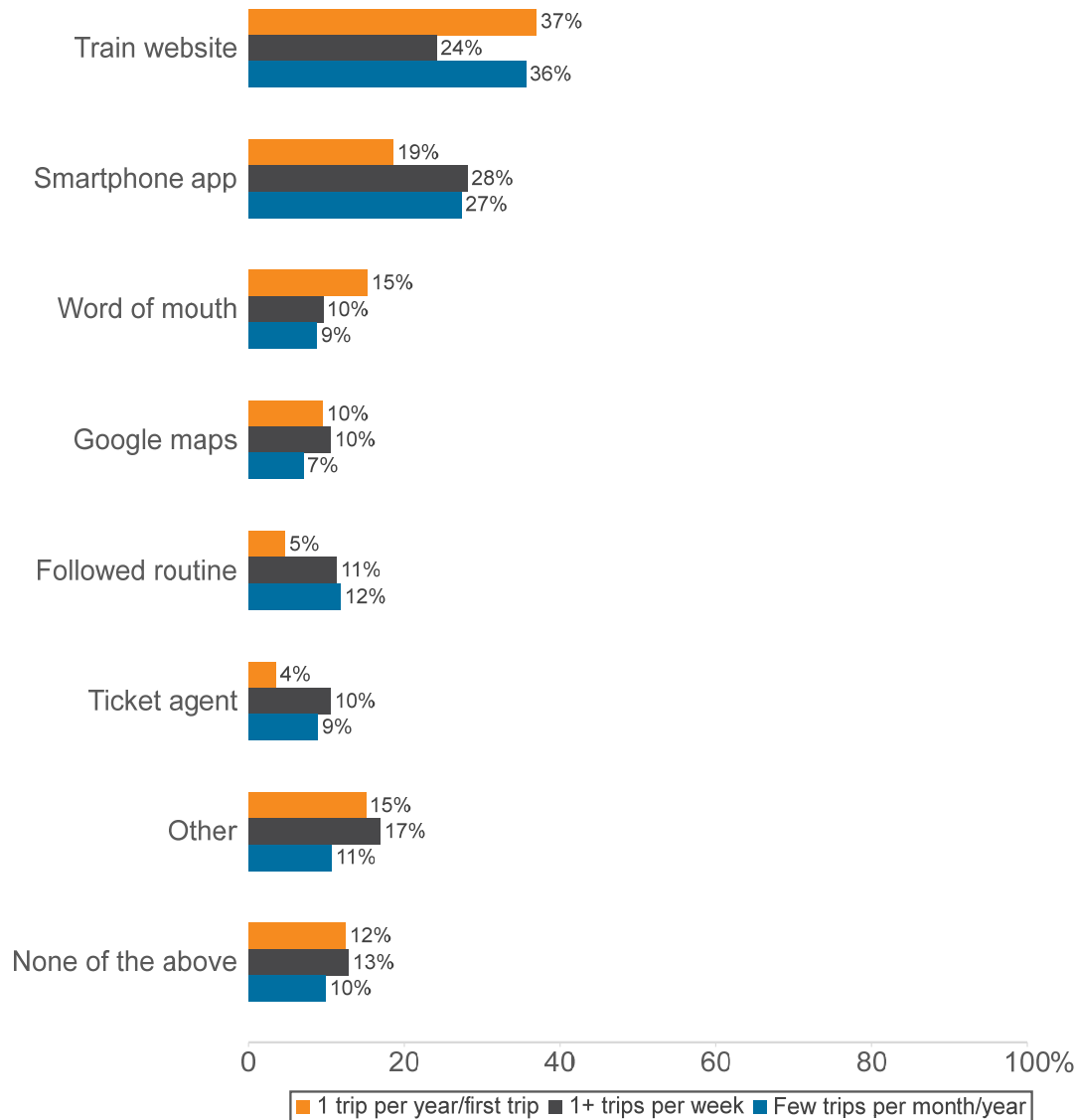
FIGURE 55: TRAVEL GROUP SIZE BY TRIP PURPOSE

n = 1,406

By Frequency of Ridership

Respondents who ride the San Joaquins a few times per year or less, or who were on their first trip when they were intercepted, used the Amtrak website to plan their trip significantly more than those who ride once or more times every week (see Figure 56). Those that ride just once a year or were on their first trip used the smartphone application to plan their trip in a smaller proportion (19%) than those that ride at least a few times per year or more.

FIGURE 56: HOW TRIP WAS PLANNED BY FREQUENCY OF RIDERSHIP



n = 1,406

By Age

Respondents under 25 are more likely to travel alone (79%) compared to all other age groups. Regardless of age, traveling alone is most common (75% overall, see Table 4). Respondents between the age of 25-34 are slightly more likely to travel with one other person (21% vs. total average of 16%).

TABLE 4: PARTY SIZE BY AGE

PARTY SIZE	UNDER 25	25-34	35-44	45-54	55-61	62+	TOTAL
I traveled alone	79%	68%	71%	78%	76%	74%	75%
One other person	16%	21%	14%	11%	16%	15%	16%
Two other people	1%	5%	4%	6%	5%	4%	4%
Three other people	2%	1%	4%	1%	2%	2%	2%
Four or more	1%	5%	7%	5%	1%	5%	4%
N	471	305	203	145	109	173	1,406

By Day of Surveying

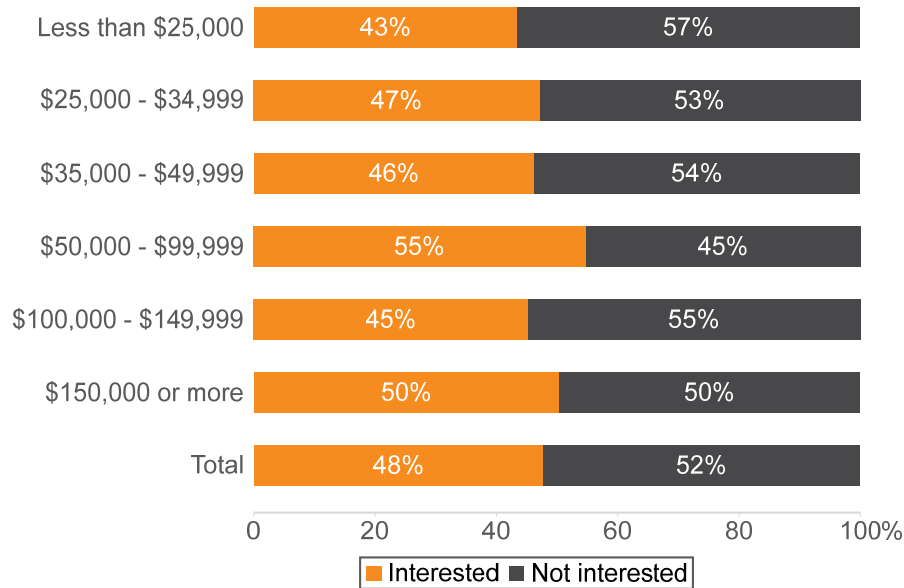
There are no significant differences in how many children respondents have in their household when comparing the day they were intercepted (see Table 5).

TABLE 5: CHILDREN IN HOUSEHOLD BY DAY OF SURVEYING

CHILDREN IN HOUSEHOLD	WEEKEND	WEEKDAY	TOTAL
No children	67%	67%	67%
1 child	15%	16%	16%
2 children	10%	8%	9%
3 children	7%	4%	5%
4 or more children	2%	4%	3%
N	568	833	1401

By Income

Respondents with annual household incomes from \$50,000 to under \$100,000 are most interested in a business class option (55%, see Figure 57).

FIGURE 57: INTEREST IN BUSINESS CLASS OPTION BY INCOME

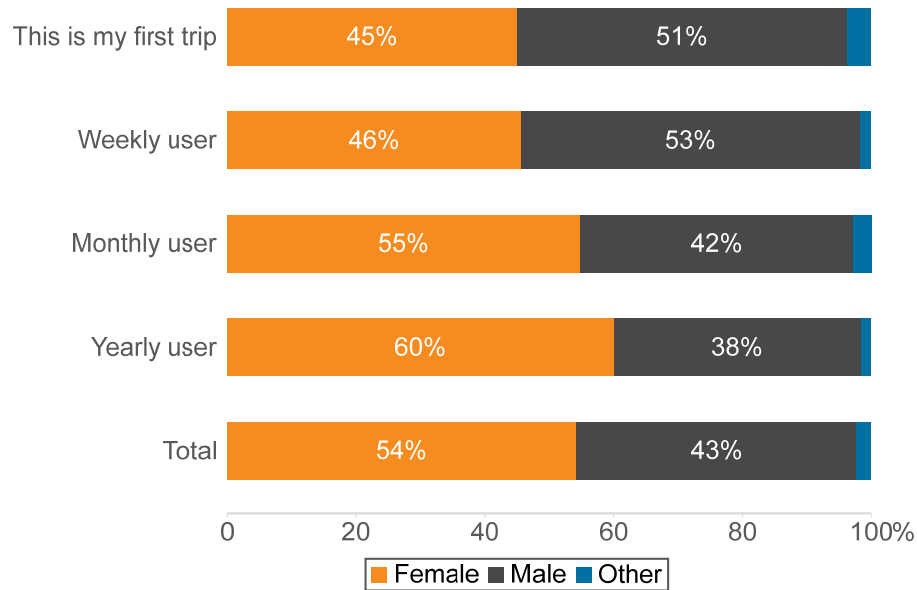
By Frequency of Ridership

Younger respondents are more likely to be on their first San Joaquins trip when they were intercepted compared to older respondents (61%, see Table 6). Six in ten respondents that ride the San Joaquins a few times a year or less identify as female (see Figure 58). African American respondents are least likely to be on their first trip compared to other races (14%, see Table 7). Respondents who ride monthly have the largest proportion of Hispanic origin (52%, see Figure 59). Nearly half of respondents on their first trip are employed full-time (47%, see Table 9). There is no significant difference in household sizes or education level when comparing frequency of ridership (see Table 8 and Table 10). Nearly four in ten monthly riders have annual household incomes under \$25,000 (39%, see Table 11).

TABLE 6: AGE BY FREQUENCY OF RIDERSHIP

AGE	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
Under 25	31%	28%	46%	27%	33%
25-34	30%	26%	18%	19%	21%
35-44	14%	18%	11%	18%	16%
45-54	8%	13%	8%	12%	10%
55-61	6%	8%	7%	9%	8%
62+	11%	6%	10%	16%	12%
N	244	173	366	623	1406

FIGURE 58: GENDER BY FREQUENCY OF RIDERSHIP

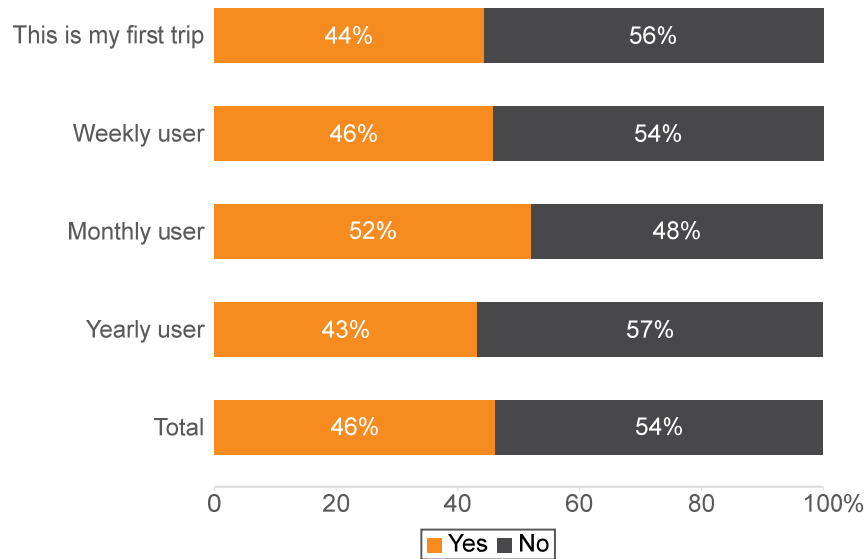


n = 1,406

TABLE 7: RACE BY FREQUENCY OF RIDERSHIP

RACE	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
White	49%	35%	41%	47%	44%
African American / Black	14%	28%	23%	16%	19%
Asian	10%	12%	10%	11%	11%
American Indian / Alaskan Native	8%	7%	5%	8%	7%
Pacific Islander	4%	3%	4%	3%	3%
Other	20%	21%	23%	21%	22%
N	244	173	366	623	1406

FIGURE 59: HISPANIC OR LATINO ORIGIN BY FREQUENCY OF RIDERSHIP



n = 1,406

TABLE 8: EDUCATION LEVEL BY FREQUENCY OF RIDERSHIP

EDUCATION LEVEL	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
Some college or currently in college	23%	32%	37%	30%	31%
High school diploma or GED	24%	19%	25%	19%	21%
Bachelor's degree	20%	17%	13%	19%	17%
Graduate or professional degree	17%	13%	8%	16%	14%
2-year Associate's or technical degree	6%	10%	8%	12%	10%
Some high school or less	11%	9%	8%	4%	7%
N	244	173	366	623	1406

TABLE 9: EMPLOYMENT STATUS BY FREQUENCY OF RIDERSHIP

EMPLOYMENT STATUS	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
Employed full-time	47%	46%	32%	44%	42%
Student, not working	7%	11%	20%	8%	11%
Retired	11%	4%	7%	16%	11%
Not currently employed	14%	9%	11%	10%	11%
Employed part-time	11%	12%	11%	9%	10%
Student and working	7%	13%	15%	8%	10%
Military	1%	1%	1%	0%	1%
Other	2%	4%	3%	4%	4%
N	244	173	366	623	1406

TABLE 10: HOUSEHOLD SIZE BY FREQUENCY OF RIDERSHIP

HOUSEHOLD SIZE	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
Just me	22%	20%	22%	25%	23%
2 people	23%	19%	21%	25%	23%
3 people	18%	22%	13%	18%	17%
4 people	19%	17%	18%	15%	17%
5 or more people	18%	22%	25%	16%	20%
N	244	173	366	623	1406

TABLE 11: ANNUAL HOUSEHOLD INCOME BY FREQUENCY OF RIDERSHIP

INCOME	FIRST TRIP	WEEKLY USER	MONTHLY USER	YEARLY USER	TOTAL
Less than \$25,000	32%	28%	39%	28%	32%
\$25,000 - \$34,999	12%	18%	14%	12%	13%
\$35,000 - \$49,999	10%	18%	12%	12%	13%
\$50,000 - \$99,999	24%	18%	16%	28%	23%
\$100,000 - \$149,999	11%	8%	9%	9%	9%
\$150,000 or more	12%	10%	9%	11%	10%
N	236	171	352	596	1355

4.0 CONCLUSION

Results from this survey can provide valuable insight into travel patterns and preferences of current San Joaquins riders to better understand how ridership has changed since the COVID-19 pandemic, as well as aid in efforts to increase and sustain ridership. The majority of respondents were riding the San Joaquins to visit family or friends, and most chose San Joaquins for a more relaxing way to travel. Many respondents say they would ride more often if tickets were cheaper. Just under half of all respondents would be interested in business class, especially with a free beverage service included. Among both newer and more tenured riders, less than two-thirds are satisfied with the on-time performance of San Joaquins service and over one-third would ride more if trips were faster. Focusing on improving trip efficiency would help retain current riders, which is vital considering more than half of respondents did not use San Joaquins service prior to the COVID-19 pandemic. In conclusion, the findings of this report show a considerable demand for San Joaquins services, as well as highlight opportunities for the maintenance and expansion of these services.

San Joaquins Joint Powers Authority

**SJJPA MARKET SURVEY
FINAL REPORT**

June 30, 2023





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1.0 EXECUTIVE SUMMARY

In the spring of 2023, RSG conducted a Market Survey on behalf of the San Joaquin Joint Powers Authority (SJJPA). The market survey was distributed entirely online to residents in San Joaquin's key market regions and collected 608 valid responses.

Respondent Profile

The demographic profile of survey respondents can be found in Table 1. After weighting, half of respondents identify as male, and the other half as female. Over half of respondents are White (57%), and 43% have Hispanic or Latino origin. The majority of respondents have annual household incomes that exceed \$50,000 before taxes (67%).

TABLE 1. MARKET SURVEY DEMOGRAPHICS

Demographics	
Age	
Under 25	12%
25 – 34	19%
35 – 44	21%
45 – 54	17%
55 – 61	14%
62+	18%
Gender	
Female	50%
Male	50%
Race	
White	57%
African American / Black	18%
American Indian / Alaskan Native	6%
Asian	6%
Pacific Islander	1%
Other	11%
Are you of Spanish, Hispanic, or Latino origin?	
Yes	43%
No	57%
Income	
Less than \$25,000	15%
\$25,000 - \$34,999	8%

\$35,000 - \$49,999	11%
\$50,000 - \$99,999	28%
\$100,000 - \$149,999	23%
More than \$150,000	16%

n = 606 – 608 (Respondents did not have to report income)

San Joaquins Awareness and Experience

Nearly seven in ten (69%) respondents report being aware of the San Joaquins route, and about four in ten (42%) respondents report having ridden the San Joaquins route in the past. When asked what improvements could be made to the San Joaquins that would make them ride more frequently, respondents' more common responses are lower fares (35%) and faster travel (29%). Among respondents who have used the San Joaquins, 69% report being satisfied with the service overall. Respondents report being able to avoid driving and traffic congestion as the primary advantages of train travel, despite 66% of them using a personal vehicle to travel on their most recent interregional trip. Notably, the top reason respondents did not take Amtrak on that trip did not know it was a possibility (24%). Nearly half of respondents (45%) say they are likely to use Amtrak for their next trip, but only 27% would if the trip required transferring to a bus.

2.0 BACKGROUND AND PURPOSE

In the spring of 2023, RSG conducted an online Market Survey on behalf of the San Joaquin Joint Powers Authority (SJJPA) to residents in San Joaquin's primary geographical markets. The survey aimed to assess awareness, perceptions, travel patterns, and needs (independent of mode) of those in the San Joaquin's target markets. The survey results can be used by SJJPA to identify opportunities for improving service, enhance marketing and outreach strategies, attract new riders, and increase trip-making by current riders. The data obtained from the Market Survey identifies reasons for non-ridership, provides a comprehensive understanding of San Joaquin's ridership, highlights differences in demographic and geographic characteristics, as well in terms of travel needs, usage and perceptions.

3.0 SJJP MARKET SURVEY

3.1 METHODOLOGY

Recruitment

RSG worked with an online sample provider, Dynata, to collect 608 valid surveys from the California regions where residents are most likely to ride the San Joaquins. Dynata uses an “e-rewards” program that provides small incentives to survey respondents. Survey invitations were sent daily and targeted to meet regional quotas. Recruitment took place from April 27th, 2023, to May 16th, 2023.

Questionnaire Design

The SJJP Market Survey questionnaire was designed to develop a detailed understanding of the perception and travel needs of residents in relevant SJJP market regions. Sections of the questionnaire included:

1. **Screening questions:** The first several questions were used to determine whether a respondent was eligible to take the survey, by confirming if the respondent lived in the target market based on Zip Code. The following were terminated: respondents who did not live in the San Joaquin Valley corridor, nor took a trip to the San Joaquin Valley corridor, nor live in the Bay Area, Sacramento, or Los Angeles corridors and took a trip that could pass through the San Joaquin Valley corridor.
2. **Awareness and perception:** Once eligible, a respondent was asked a series of questions about their awareness of San Joaquins’ rail services, and Amtrak Thruway Bus service. The respondent was then asked detailed questions about their usage of the San Joaquins and open-ended questions about perceptions of San Joaquins’ service.
3. **Interregional Travel:** These questions focused on travel to regions throughout California, followed by more detailed questions on a specific recent trip along the San Joaquins’ corridor. The specific trip selected for additional focus was based on how often the respondent traveled to the destination and the likelihood of using the San Joaquins for future trips.
4. **Intra-Valley Travel:** San Joaquin Valley residents received additional questions about recent trips within the Valley.
5. **Reasons to Ride:** All respondents were asked a set of questions about their opinions of train travel and asked about the factors that might motivate them to ride the San Joaquins.

6. **Satisfaction with San Joaquins:** Respondents that did travel on the San Joaquins were asked an additional set of questions about their overall satisfaction specific service attributes.
7. **Demographics:** Respondents were asked to provide demographic information including household income, household size, race, ethnicity (Spanish, Hispanic, Latino origin or not), and employment.

Sampling

RSG first defined regional markets for the San Joaquins, each region a collection of counties in California, shown in Figure 1.

FIGURE 1: SAN JOAQUINS MARKET MAP



This map was adapted from the 2019 SJJPA Market Survey, but minor updates were made to the 2019 version. For instance, in 2019, parts of Solano County (at the cross-section of North Coast, Sacramento, and Bay Area/Silicon Valley areas) were not included. Solano County was included in the Bay Area/Silicon Valley market for the 2023 iteration of the survey. A list of Zip Codes, largely consistent with 2019, was assigned to each of these markets. Zip codes are an

excellent way to gather data about where someone lives at an appropriate level of geographic detail; most people know their Zip Code (unlike, for example, their Census tract) and are willing to share it without being concerned about privacy. The market survey was conducted online, and potential respondents were invited to take the survey based on their home Zip Code.

Data Processing

In total, 690 completed surveys were collected. Write-in responses were evaluated for incoherent or inappropriate responses. Respondents with incoherent responses were removed from the dataset. For example, incoherent responses included comments that contained random strings of letters or random phrases that were entirely unrelated to the question, transportation, transit, or San Joaquins' service. Respondents' completion times were also evaluated. Respondents who took the survey in less than five minutes were reviewed thoroughly. In total, 82 responses were removed from the dataset based on these criteria, leaving 608 valid responses as part of the analysis.

Weighting

Weighting targets were created using 2021 census demographics for each region: gender, ethnicity, and household income. An iterative proportional fit (IPF) algorithm was applied to generate weights that aligned with the desired demographic targets.

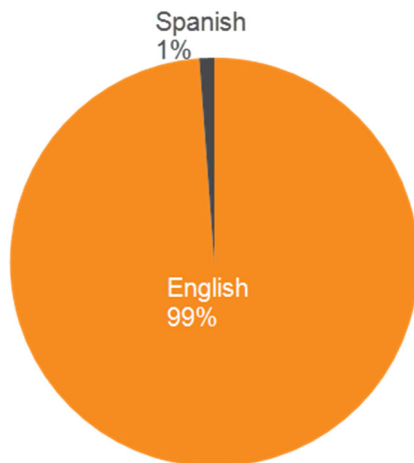
Following the IPF algorithm, a factor was applied to the resulting weights. These factors were created using the sampling quotas defined in the Sampling Plan created by analyzing a report of Zip codes of riders on the San Joaquins from October 2021 to January 2023. By incorporating this factor, the weights aligned with the original sampling quotas.

3.2 RESULTS

Respondent Profile

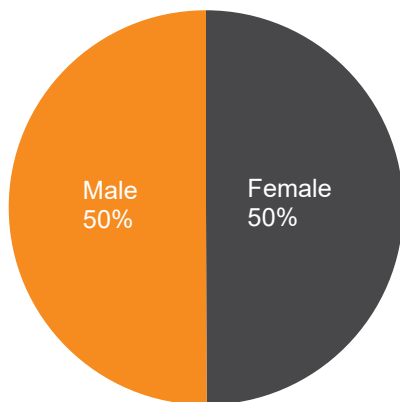
Most respondents (603 out of 608, 99%) took the survey in English (Figure 2). After weighting, the respondents were evenly split by gender (see Figure 3). About half (52%) of respondents are between ages 18 and 45 (see Figure 4). More than half of respondents identify as White (see Figure 5), and 43% are of Hispanic, Latino, or Spanish origin (see Figure 6). A plurality of respondents (31%) have attended some college or are currently in college (see Figure 7). About half (49%) of respondents are currently employed full-time (see Figure 8). About half of respondents (48%) either live alone or with one other person (see Figure 9), and a majority do not have children in the household (63%, see Figure 10). More than three in four (76%) of respondents have one or two cars in their household (see Figure 11). There is wide variance in the household incomes for respondents, but a majority have annual household incomes between \$50,000 and \$150,000 (see Figure 12).

FIGURE 2: SURVEY LANGUAGE



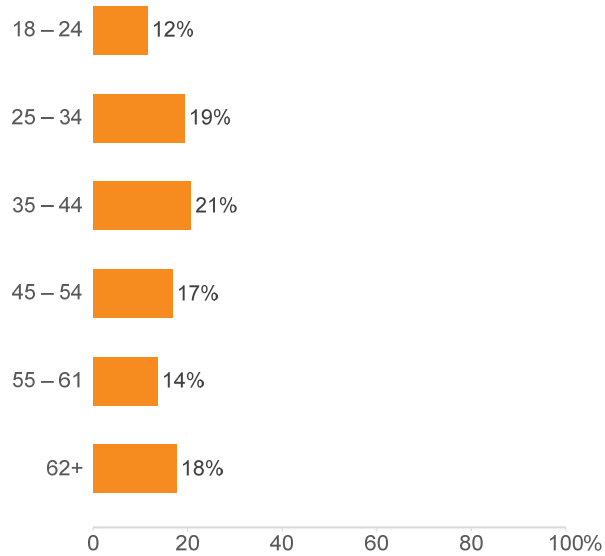
n = 608 (unweighted results)

FIGURE 3. GENDER



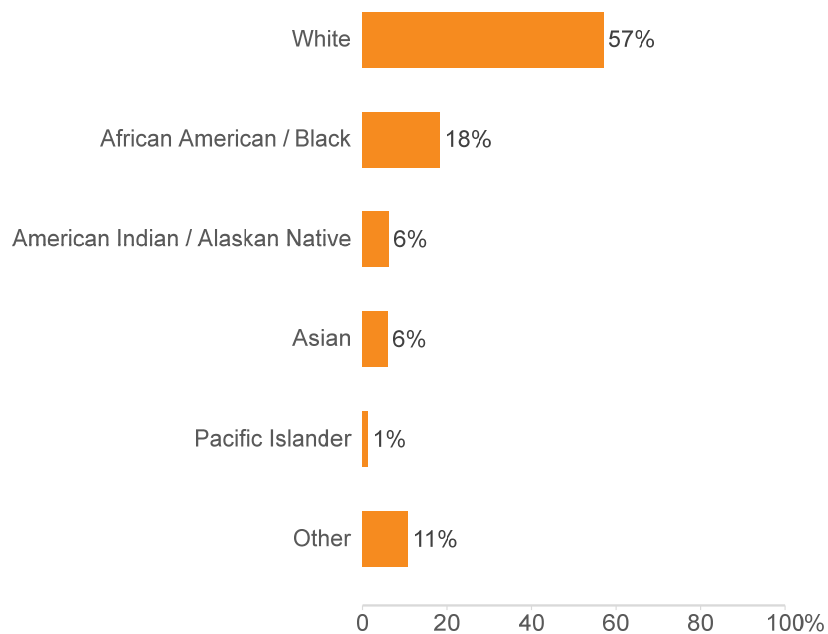
n = 608

FIGURE 4. AGE



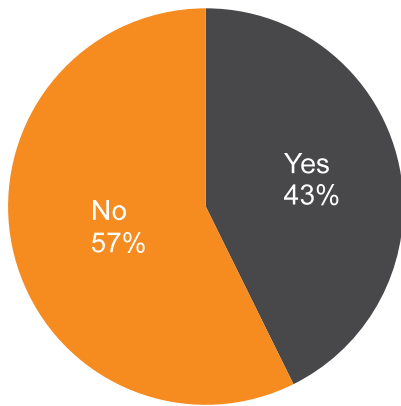
n = 608

FIGURE 5. RACE



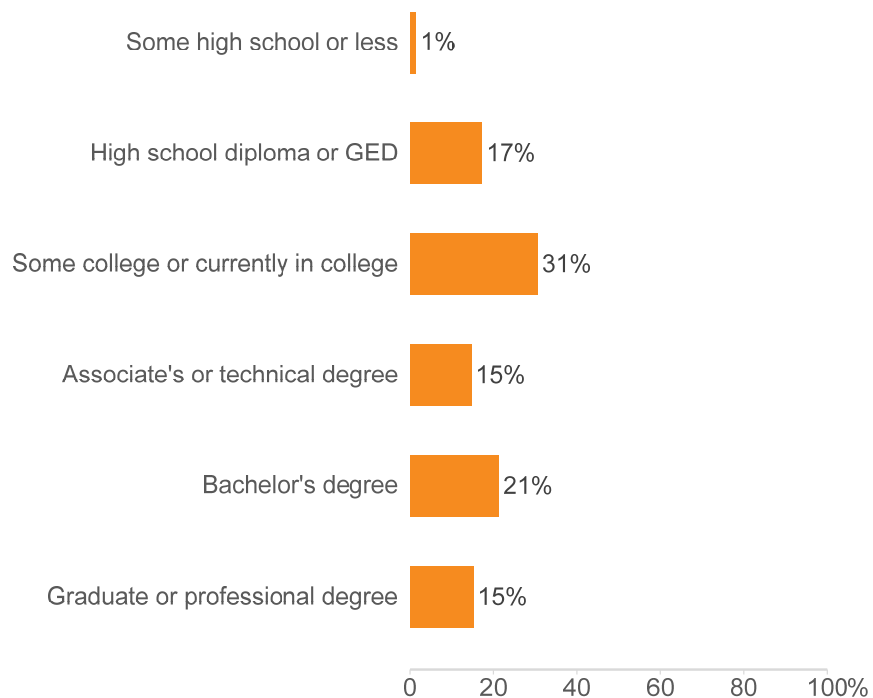
n = 608

FIGURE 6. HISPANIC OR LATINO ORIGIN



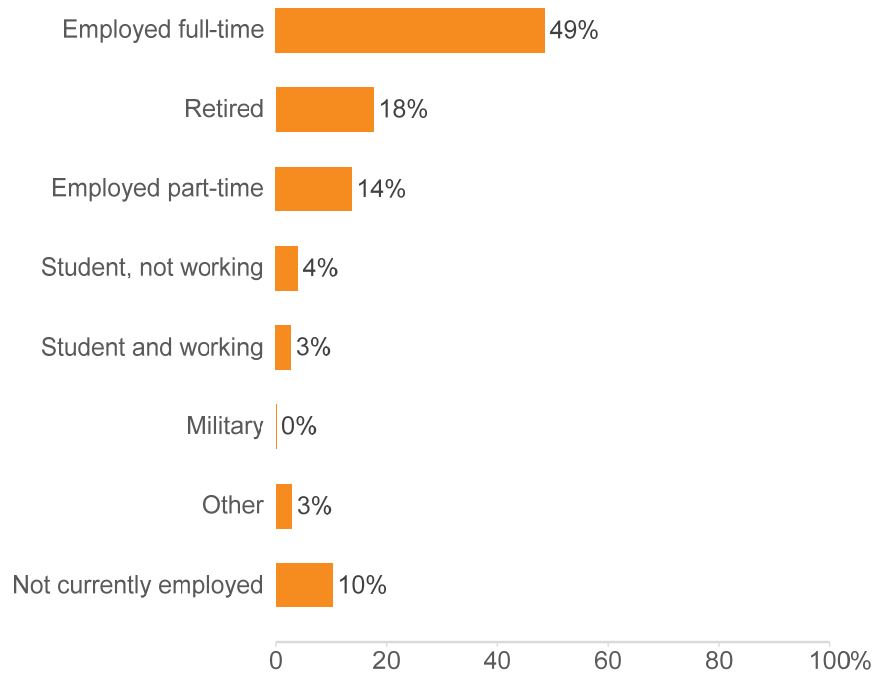
n = 608

FIGURE 7. EDUCATION



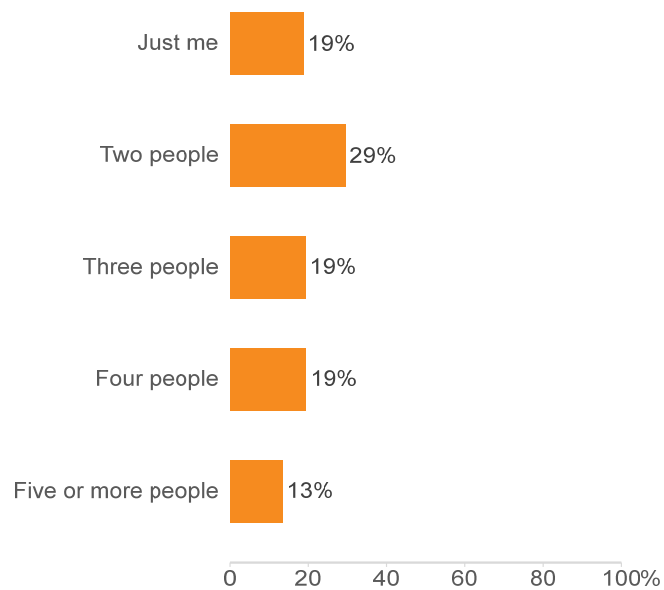
n = 608

FIGURE 8. EMPLOYMENT STATUS



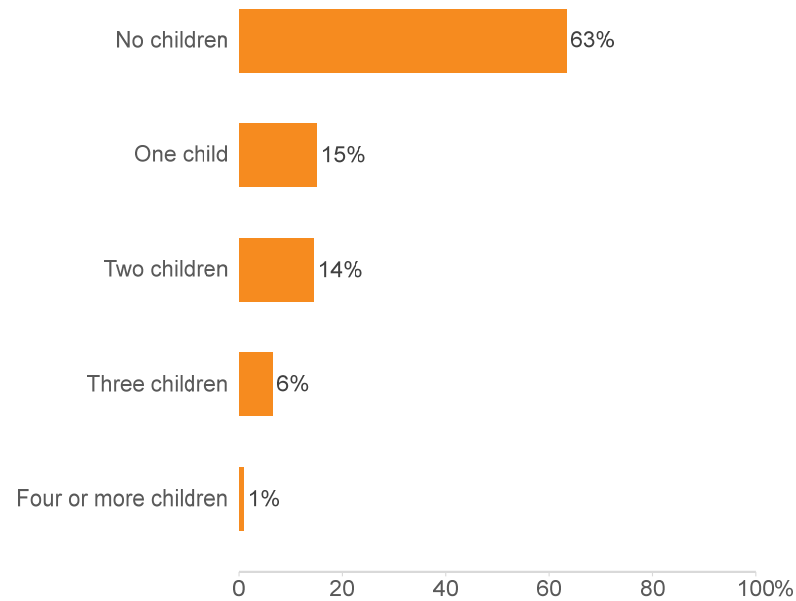
n = 608

FIGURE 9. HOUSEHOLD SIZE



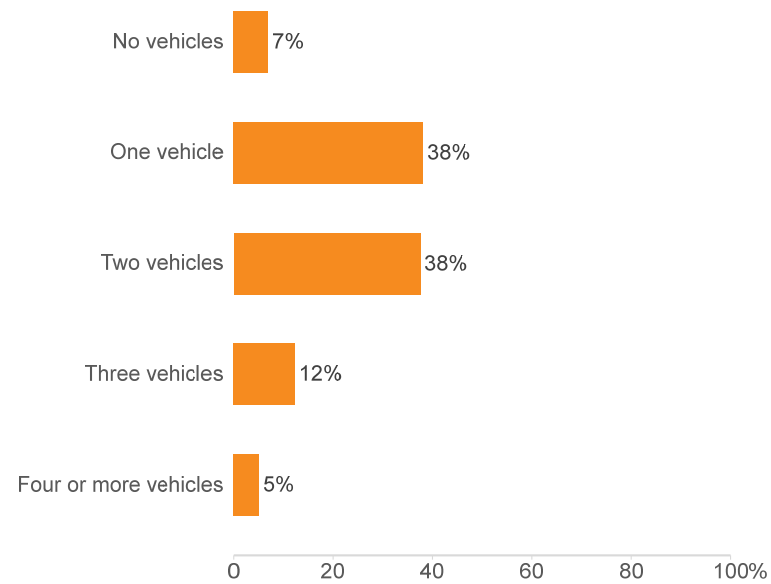
n = 608

FIGURE 10. CHILDREN IN HOUSEHOLD



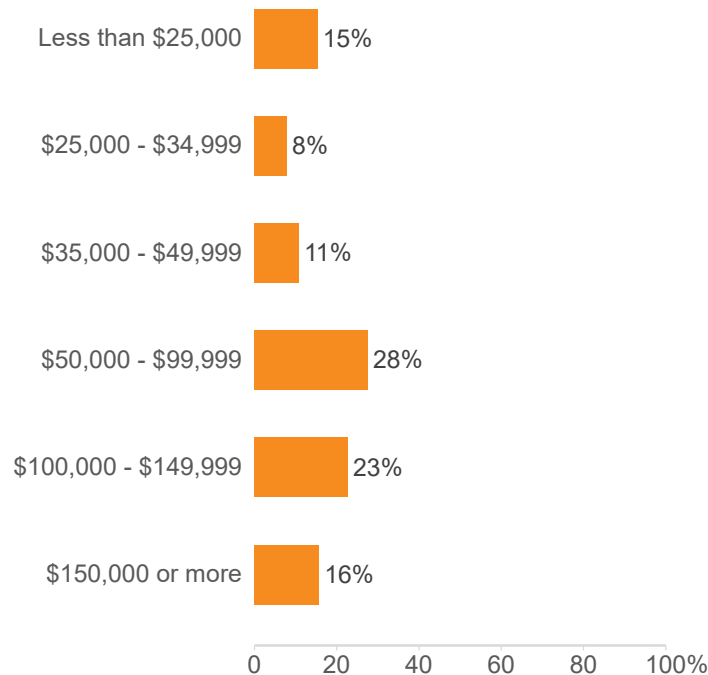
n = 608

FIGURE 11. HOUSEHOLD VEHICLE(S)



n = 608

FIGURE 12. YEARLY HOUSEHOLD INCOME



n = 606 (Respondents were not forced to answer this question.)

San Joaquins Experience

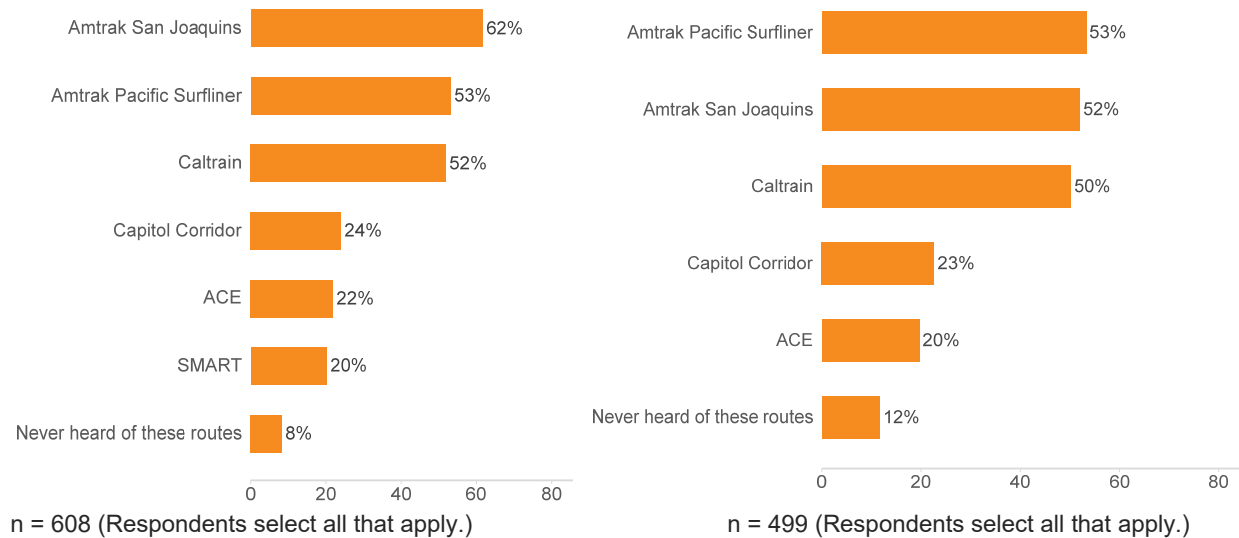
Respondents reported their awareness of San Joaquins service by responding to three questions. First, the Market Survey presented the name “Amtrak San Joaquins” alongside the names of other Amtrak services in California, and respondents selected all of the services they are aware of. Respondents report greater awareness of the San Joaquins than any other service (see Figure 13). This is an increase of ten percentage points since the 2019 SJJPA Market Survey. The second question asked about awareness of the same train services, but only displayed brand logos. When shown logos, respondents are more aware of Caltrain than the San Joaquins but only by five percentage points (see Figure 15). However, respondents are significantly more aware of Amtrak San Joaquins in the 2023 SJJPA Market Survey compared to the 2019 SJJPA Market Survey (49% vs. 25%). Finally, respondents were asked if they were aware that train service is offered between the San Francisco Bay Area (or Sacramento) and Bakersfield without reference to the name “San Joaquins” or showing the logo. Nearly seven in ten (69%) respondents report being aware of the San Joaquins route and increase of 11 percentage points from the 2019 SJJPA Market Survey. Additionally, about four in ten (42%) respondents report having ridden the San Joaquins route (see Figure 16 and Figure 17). Word of mouth and the Amtrak website or app are the most common methods of exposure to the San

Joaquins (both 34%, see Figure 14). When asked what improvements could be made to the San Joaquins that would make them ride more frequently, respondents' more common responses are lower fares (35%) and faster travel (29%, see Figure 18).

FIGURE 13. AWARENESS OF LOCAL RAIL SERVICES BY NAME

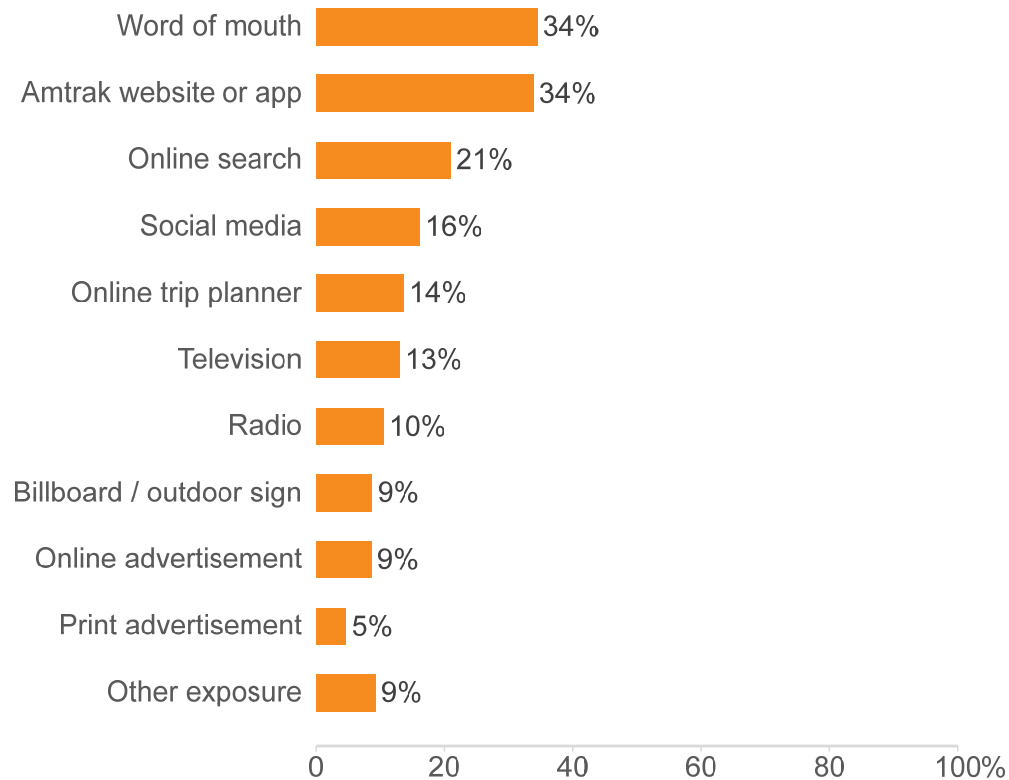
2023 Awareness of Local Rail Services

2019 Awareness of Local Rail Services



(Note: The increase in awareness of Amtrak San Joaquins from 53% in 2019 to 62% in 2023 is statistically significant. SMART was a new option in the 2023 survey.)

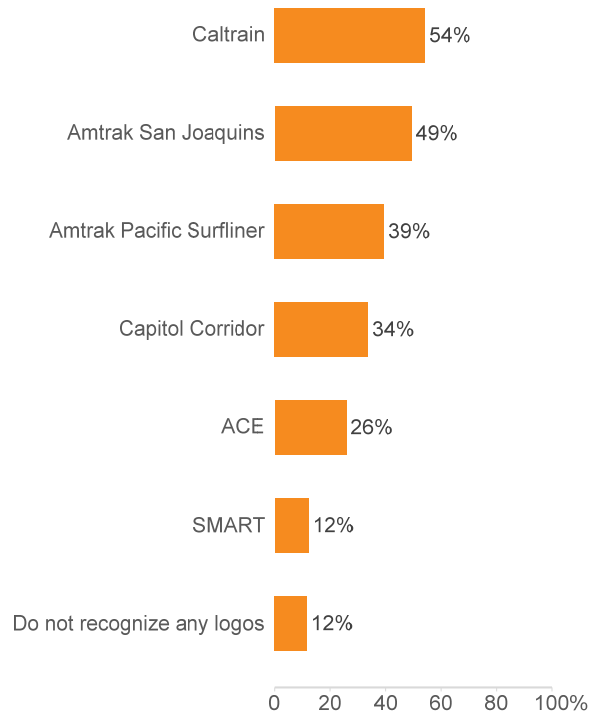
FIGURE 14. METHODS OF EXPOSURE TO AMTRAK SAN JOAQUINS



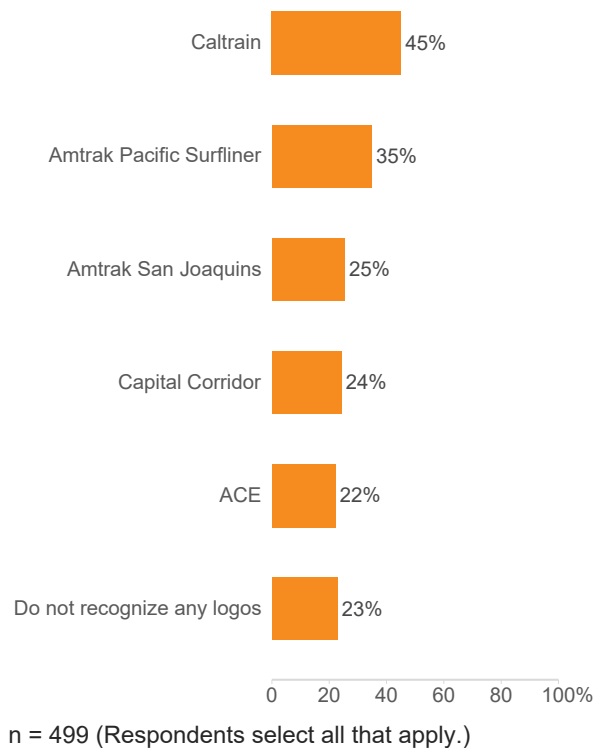
n = 400 (Respondents who are aware of San Joaquins. Respondents select all that apply.)

FIGURE 15. FAMILIARITY WITH LOGOS

2023 Familiarity with Local Rail Services Logos



2019 Familiarity with Local Rail Services Logos

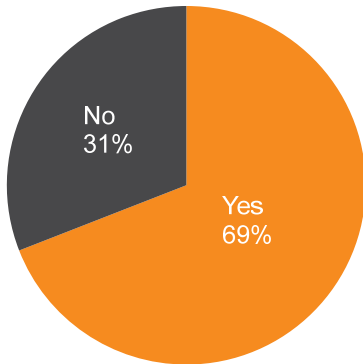


(SMART was a new option in the 2023 survey.)

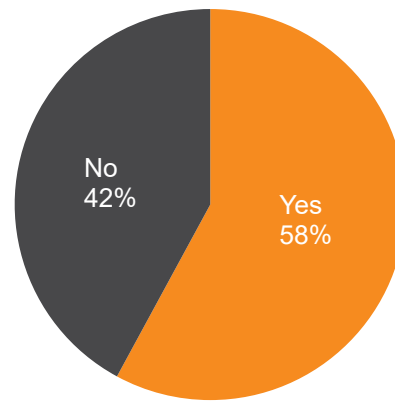
FIGURE 16. AWARENESS OF RAIL SERVICE BETWEEN BAY AREA (SACRAMENTO) AND BAKERSFIELD

2023 Awareness of San Joaquins Service

2019 Awareness of San Joaquins Service

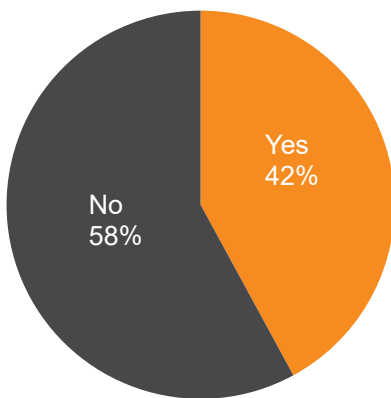


n = 608



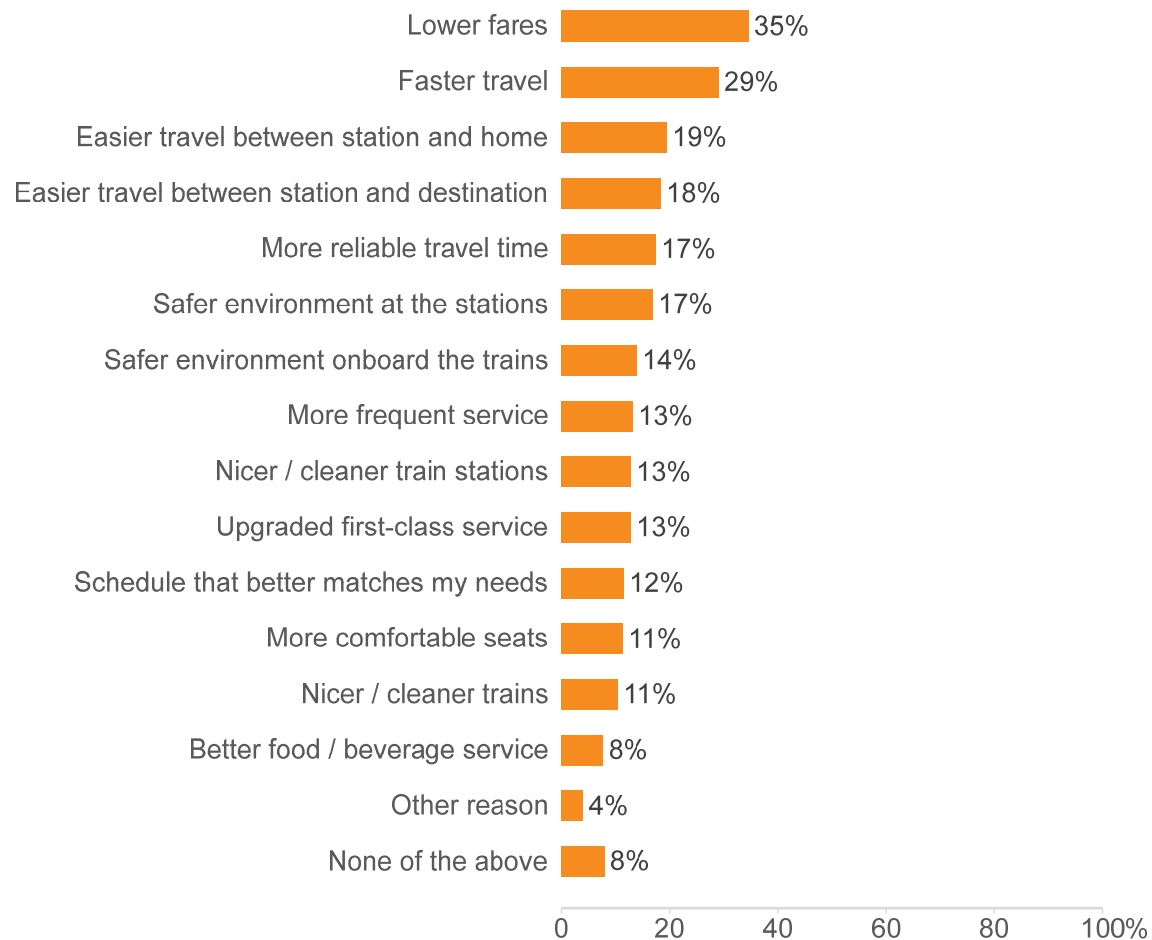
n = 499

FIGURE 17. USE OF AMTRAK SAN JOAQUINS



n = 608

FIGURE 18. MOTIVATION TO START TO USE/USING THE SAN JOAQUINS MORE

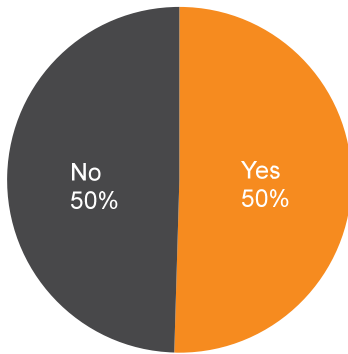


n = 400 (Respondents who are aware of the San Joaquins. Respondents select between one to three answer options.)

Amtrak Thruway Bus Experience

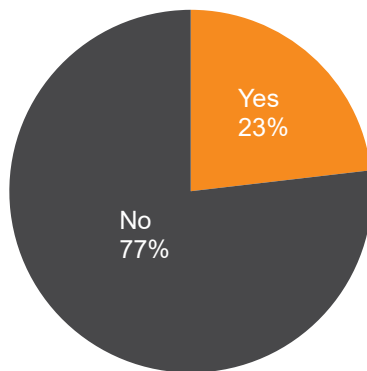
Half of respondents report being aware of the Amtrak Thruway Bus service (see Figure 19), and about two in ten (23%) have used the Thruway Bus (see Figure 20). Among respondents who have not used the Thruway Bus, about a fifth of respondents say that the bus does not go where they need to go (22%), and that they do not like to plan their trips around bus schedules (21%, see Figure 21).

FIGURE 19. AWARENESS OF AMTRAK THRUWAY BUS SERVICE



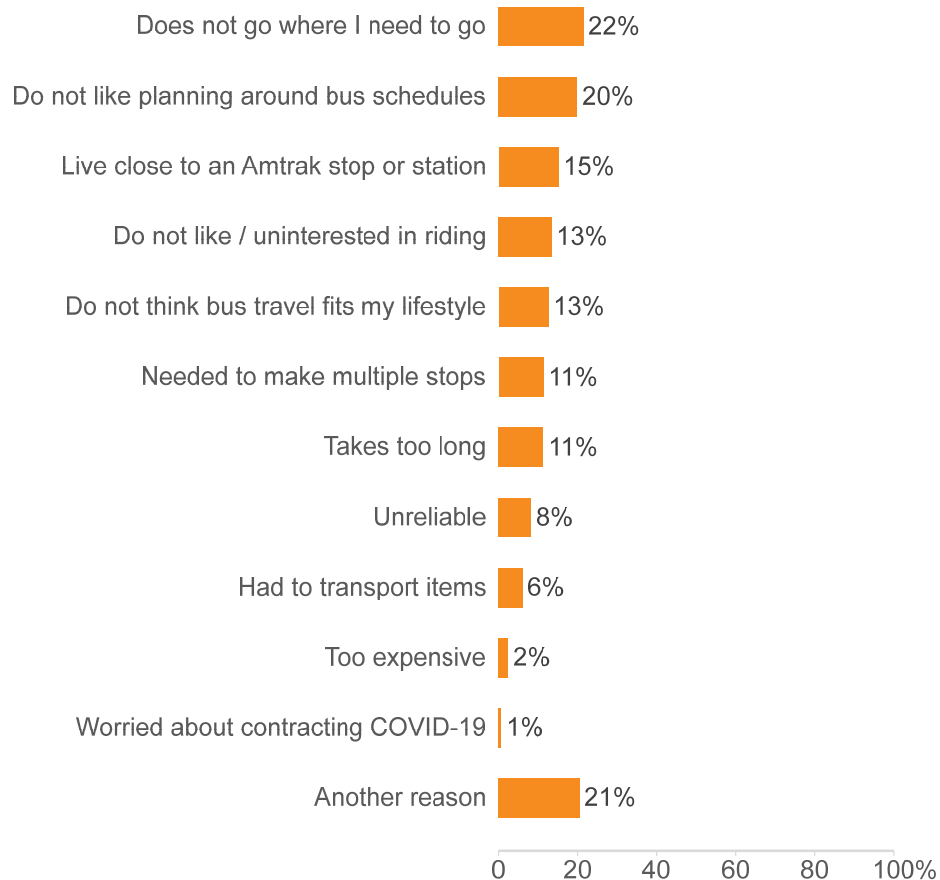
n = 608

FIGURE 20. PAST USE OF AMTRAK THRUWAY BUS



n = 608

FIGURE 21. REASONS FOR NOT CONSIDERING AMTRAK THRUWAY BUSES FOR TRIP



n = 56 (Respondents who have heard of the Thruway Bus, ridden the San Joaquins, and not used the Thruway Bus. Respondents select all that apply.)

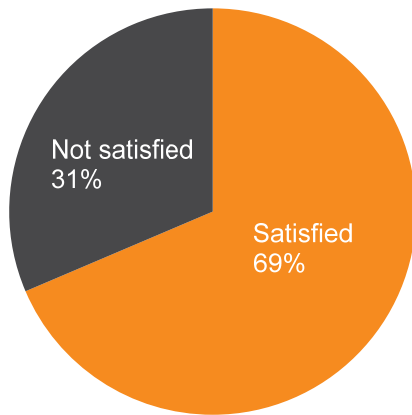
Satisfaction

Among respondents who have used the San Joaquins, 69% report being either “very satisfied” or “somewhat satisfied” with the service, down 2 percentage points from 2019 (see Figure 22). Respondents report being satisfied with the safety of the ride (78%), the ease of boarding (76%), and the courtesy of the staff (74%). The attributes of the San Joaquins which respondents are least satisfied include the length of the travel time, the cleanliness of the stations and the Café Car (see Figure 23). The perception of value for money increased by 11 percentage points between 2019 and 2023 and is now at 74% satisfied. Respondents report being able to avoid driving and traffic congestion as the primary advantages of train travel (see Figure 24).

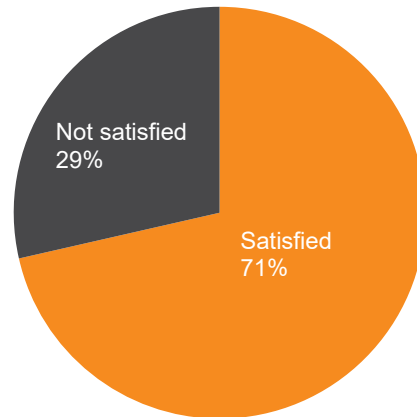
FIGURE 22. OVERALL SATISFACTION WITH SAN JOAQUINS SERVICE

2023 Overall Satisfaction with Service

2019 Overall Satisfaction with Service



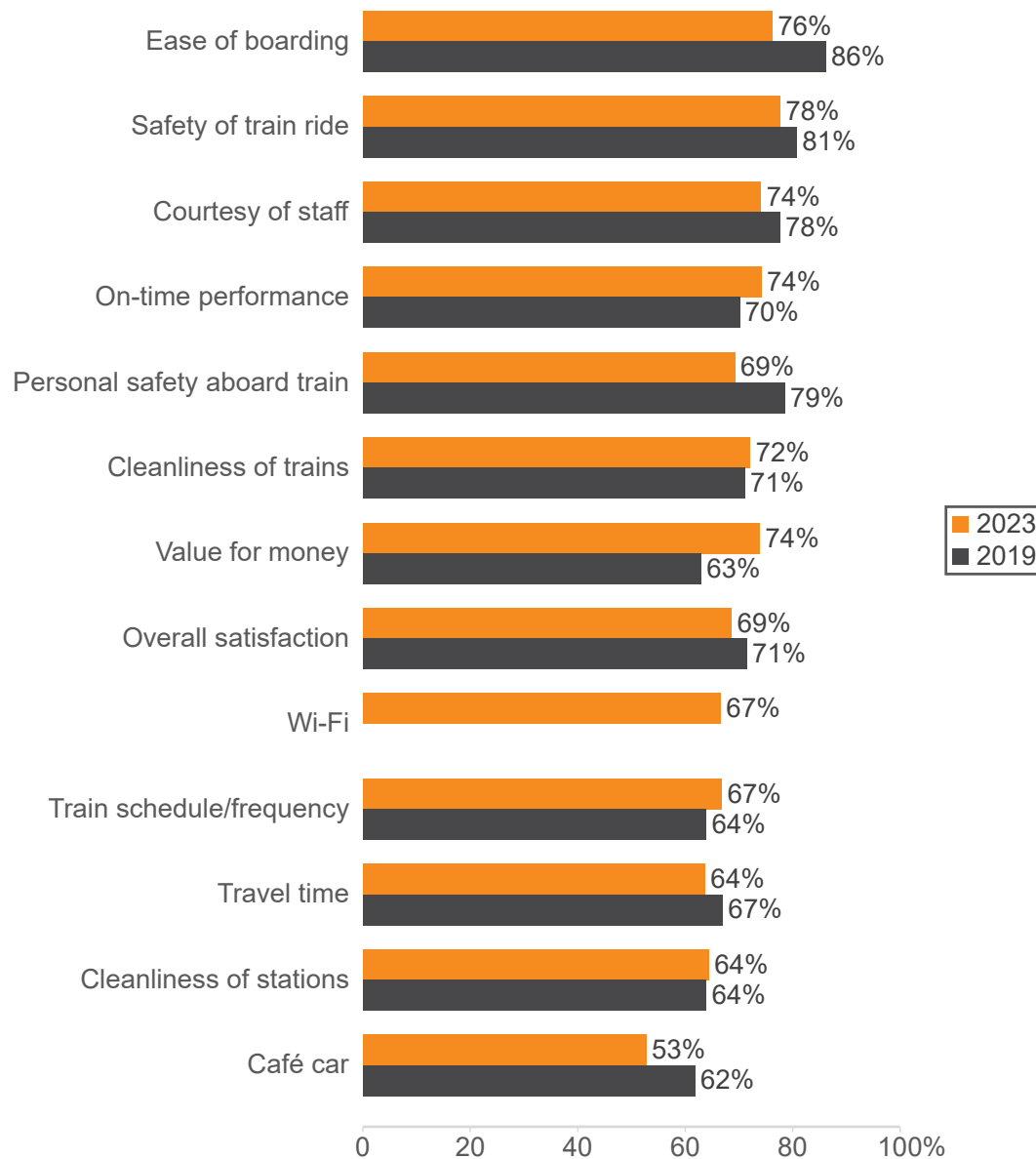
n = 226



n = 112

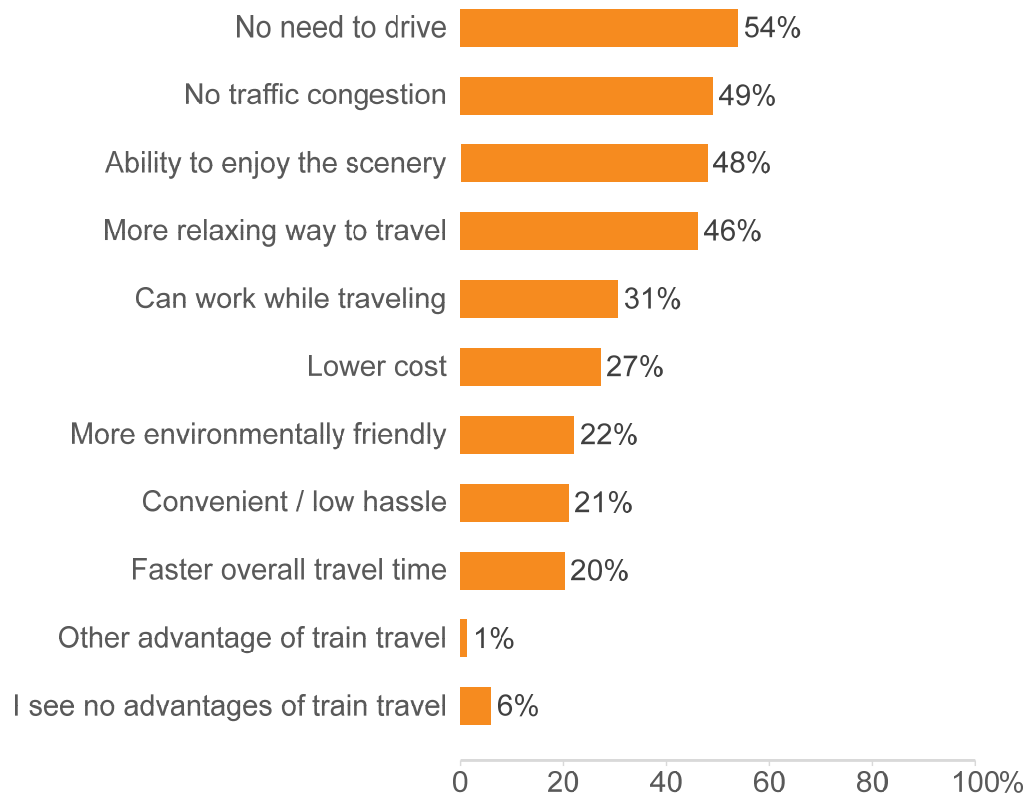
(Respondents who have ridden the San Joaquins.)

FIGURE 23. SATISFACTION WITH SERVICE ATTRIBUTES (TOP 2) % “VERY SATISFIED” AND “SOMEWHAT SATISFIED”



2023: n = 197 – 222, 2019: n = 102 – 109 (Respondents who have ridden the San Joaquins and had an opinion. Wi-Fi was a new service attribute in the 2023 survey.)

FIGURE 24. PERCEIVED ADVANTAGES OF TRAIN TRAVEL

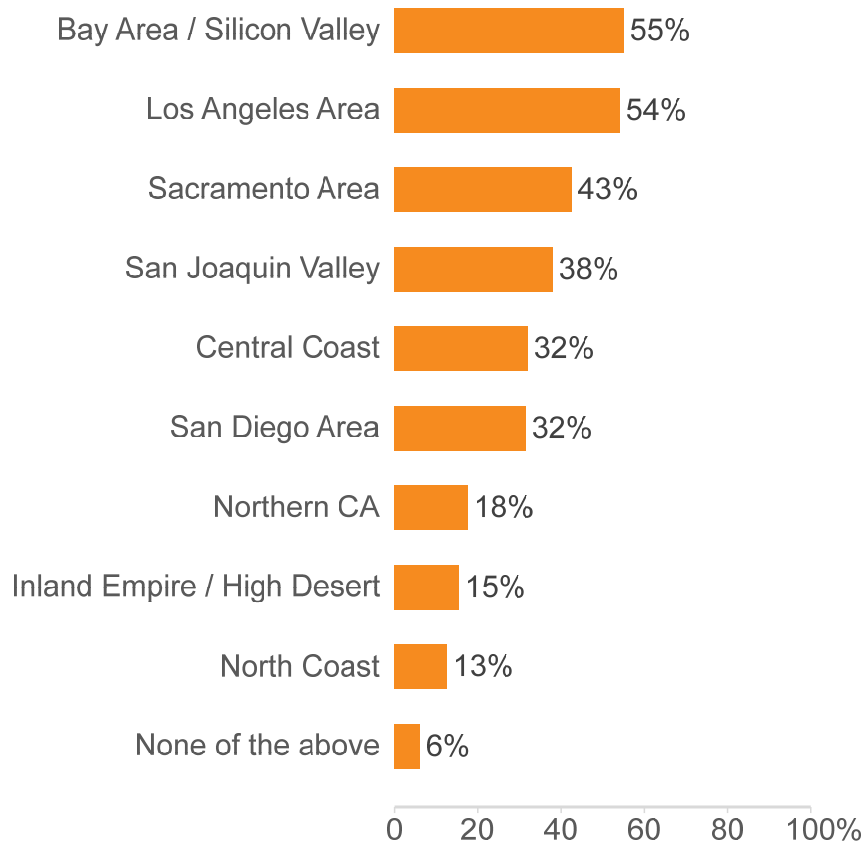


n = 608 (Respondents select all that apply.)

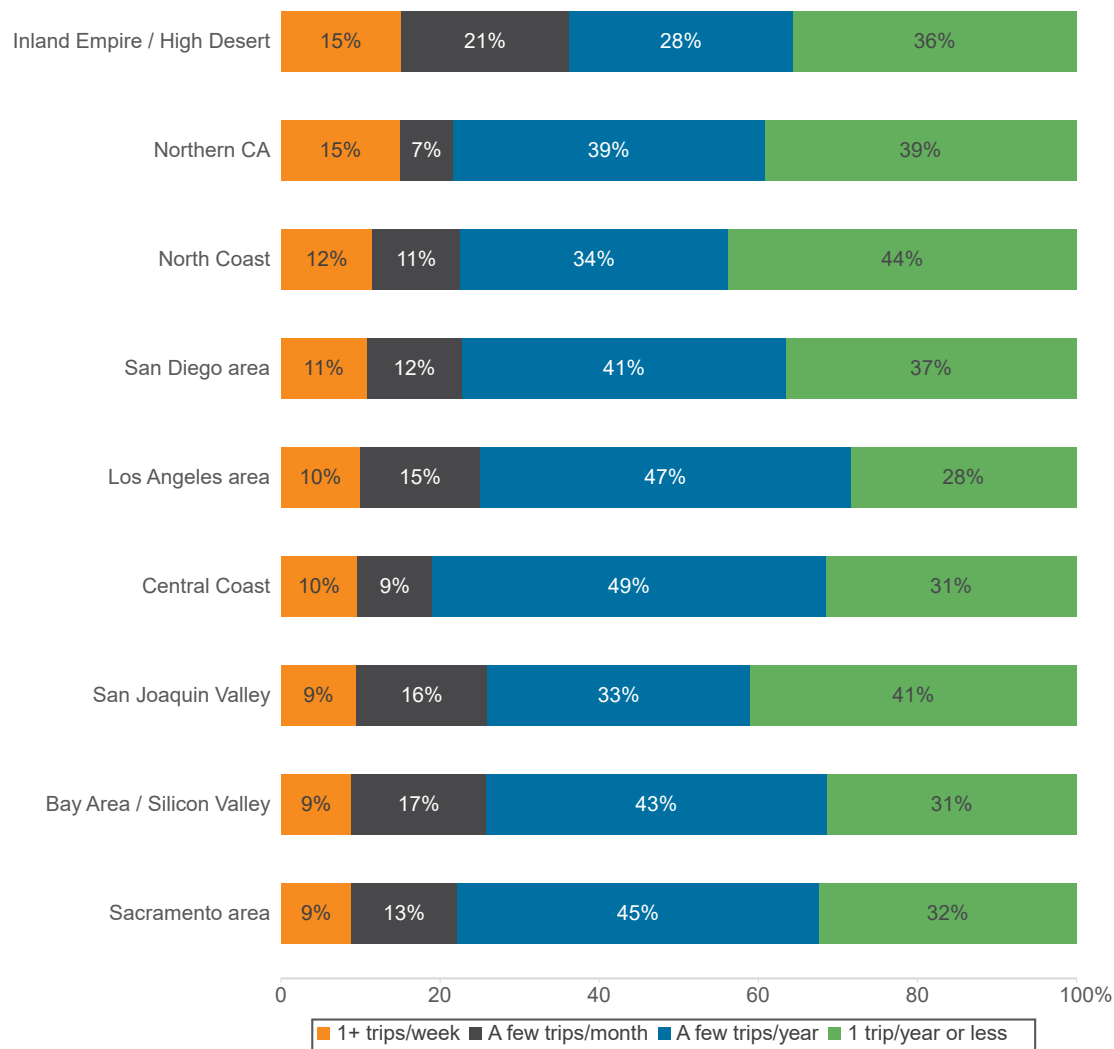
Interregional Travel within California

Over half of respondents reported visiting the Bay Area and Silicon Valley, and the Los Angeles area within the past year (see Figure 25). Figure 26 shows how frequently respondents visit areas outside their home region.

FIGURE 25. REGIONS VISITED IN THE PAST YEAR



n = 608 (Respondents select all that apply.)

FIGURE 26. FREQUENCY OF TRIPS TO SELECT CALIFORNIA REGIONS

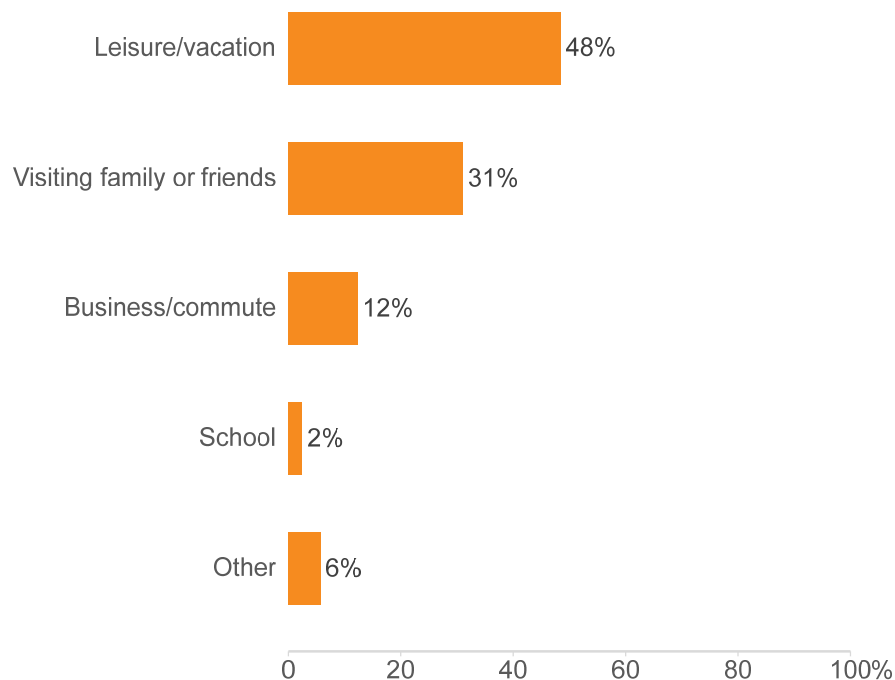
n = 377 (Respondents who recently took a trip to another California region.)

Interregional Trip Details

Among respondents who made a recent trip to a region other than their home region, about half (48%) say their travel was for leisure and 12% percent say it was for business (see Figure 27). Traveling with one other individual was the most common response among respondents (41%). Respondents' recent trips were primarily made using personal vehicles (66%). If a personal vehicle were unavailable to respondents, 17% say they would not have made their trip; Amtrak was an alternative mode of travel for 23% of respondents, just slightly behind a rental or company car (26%, see Figure 30). Among respondents who did not take their trip on the San

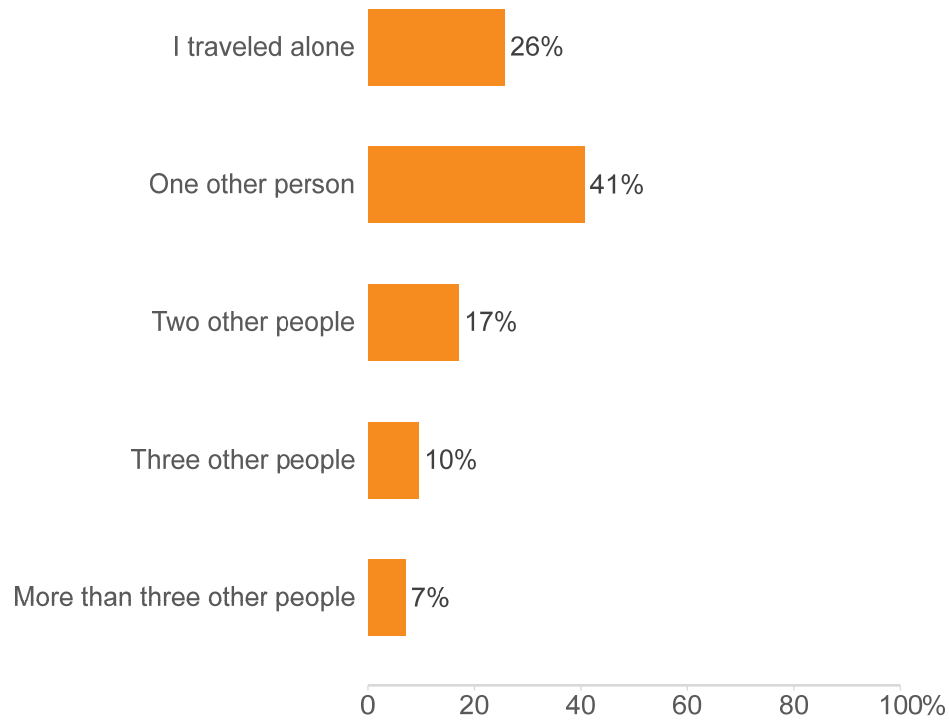
Joaquins, 24% say they did not know that Amtrak was an option for their trip (see Figure 31). Nearly half of respondents (45%) say they are “very likely” or “likely” to use Amtrak for their next trip, which is up sixteen percentage points since the 2019 Market Survey (see Figure 32). However, 27% of respondents reported they are “very likely” or “likely” to use Amtrak if the trip were to require a transfer to a bus (see Figure 33). This implies that the requirement of a transfer to a bus could serve as a barrier for some individuals when considering the use of Amtrak San Joaquins.

FIGURE 27. PURPOSES FOR TRIPS TO OTHER CALIFORNIA REGIONS



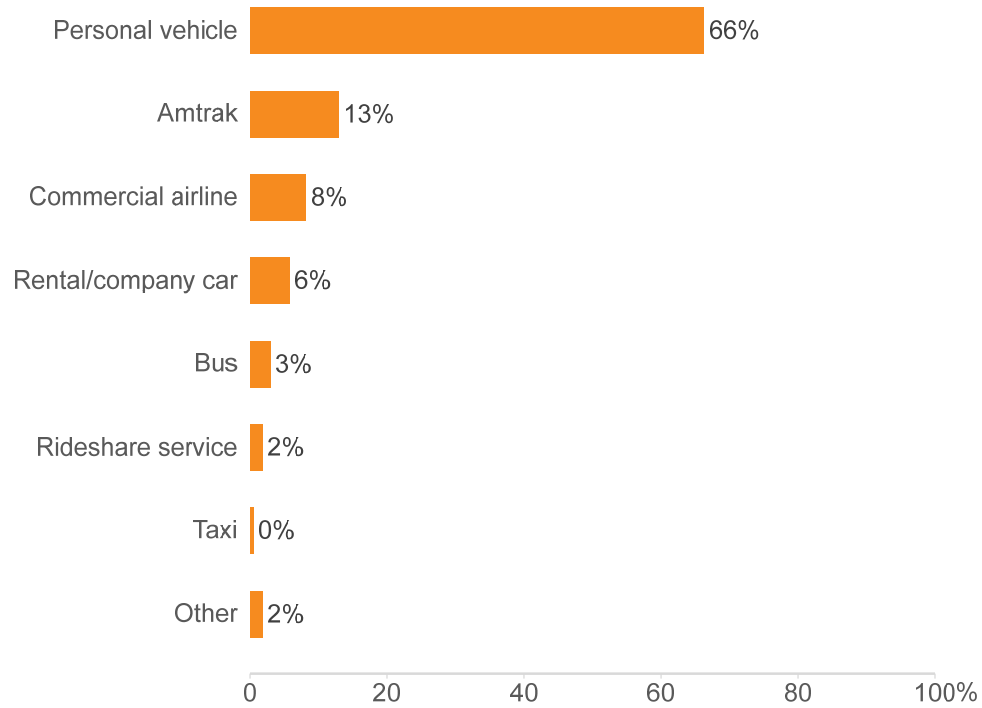
n = 560 (Respondents who recently took a trip to another California region.)

FIGURE 28: PARTY SIZE OF TRIPS TO OTHER CALIFORNIA REGIONS



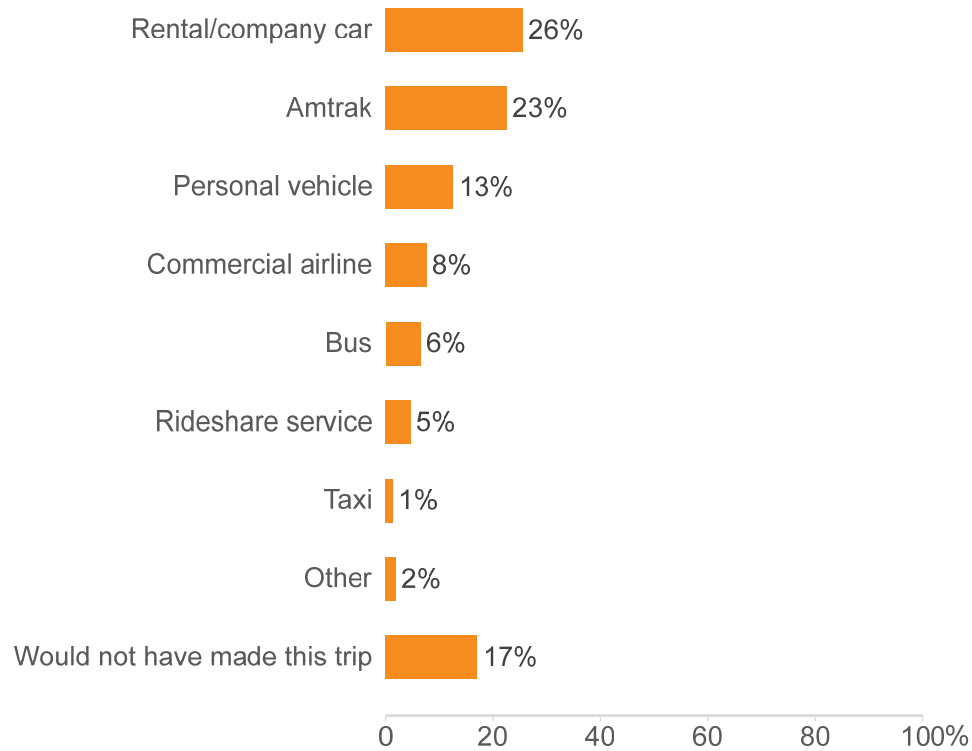
n = 560 (Respondents who recently took a trip to another California region.)

FIGURE 29: PRIMARY MODE FOR TRIP TO OTHER CALIFORNIA REGIONS



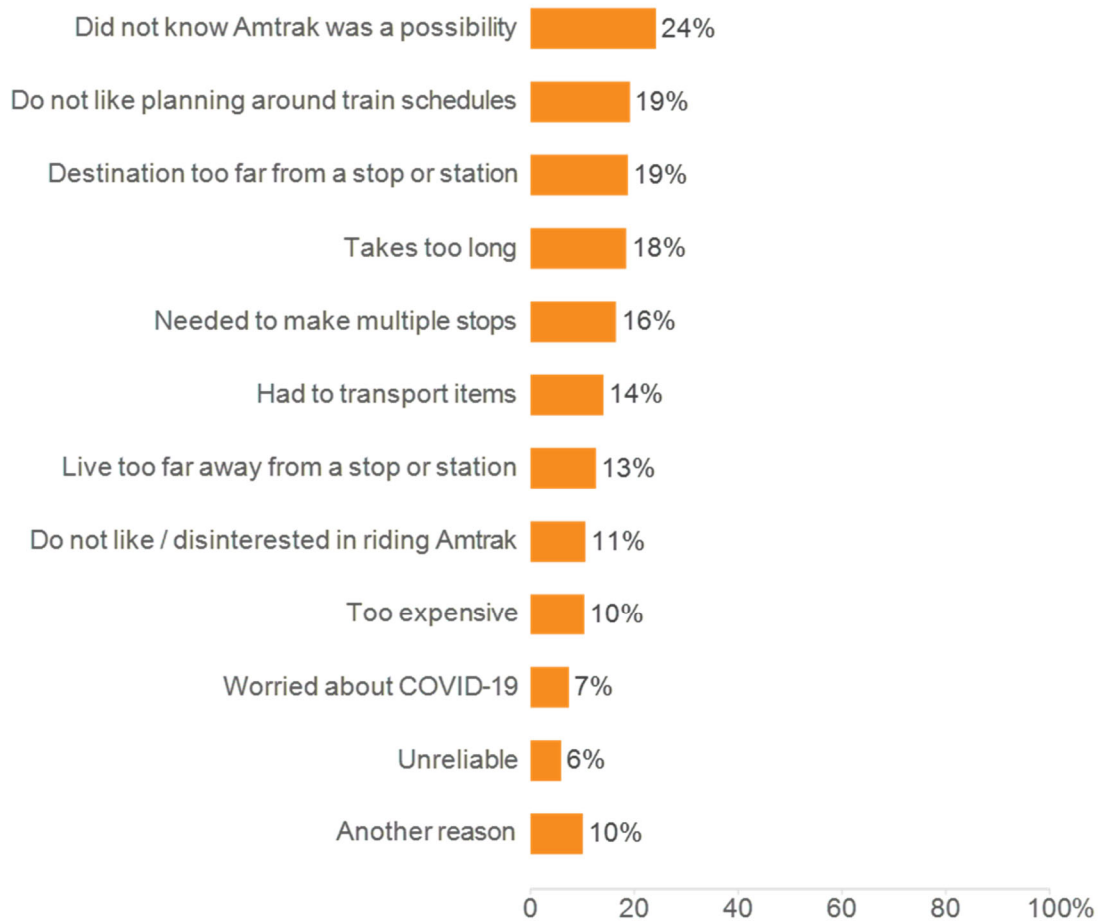
n = 560 (Respondents who recently took a trip to another California region)

FIGURE 30. ALTERNATE TRAVEL MODES FOR TRIPS TO OTHER CALIFORNIA REGIONS



n = 560 (Respondents who recently took a trip to another California region.)

FIGURE 31. REASONS FOR NOT CONSIDERING AMTRAK FOR THEIR TRIP



n = 377 (Respondents who recently took a trip to another California region and did not use Amtrak. Respondents select all that apply.)

FIGURE 32. STATED LIKELIHOOD OF TAKING THE TRAIN ON A FUTURE TRIP

2023 Likelihood of Riding in the Future

2019 Likelihood of Riding in the Future

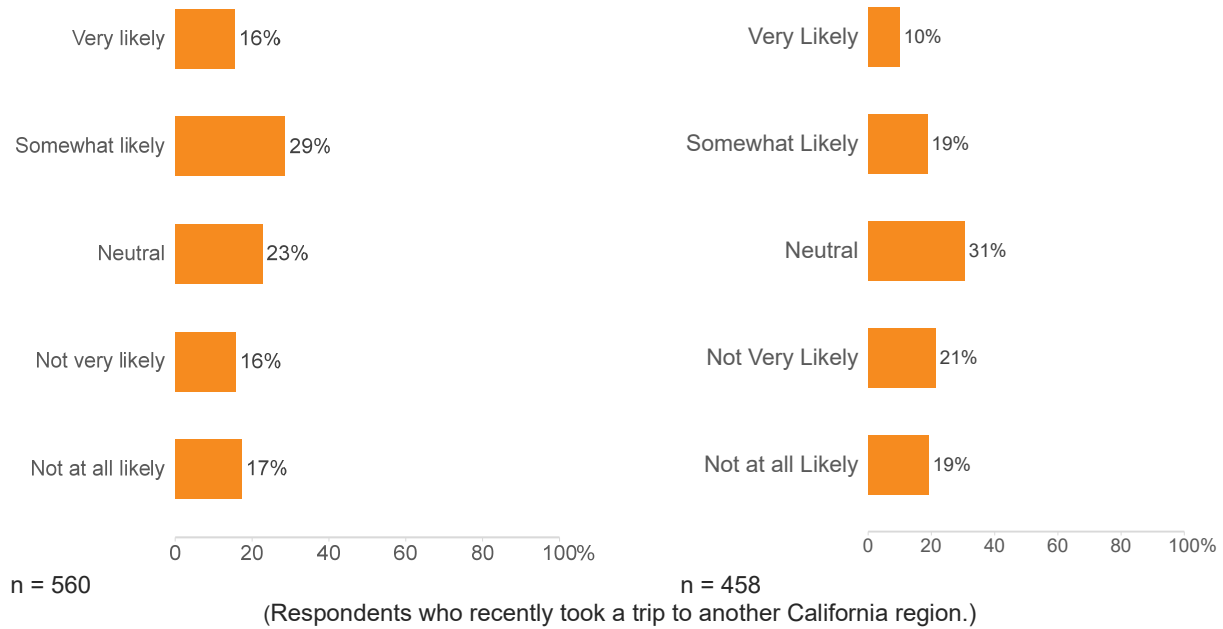
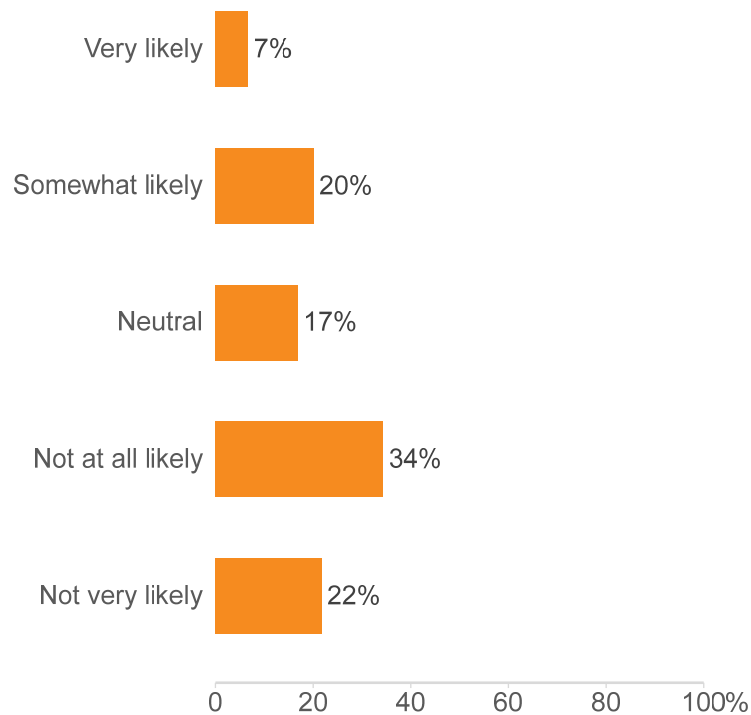


FIGURE 33. STATED LIKELIHOOD OF TAKING THE TRAIN ON A FUTURE TRIP IF A BUS TRANSFER IS REQUIRED

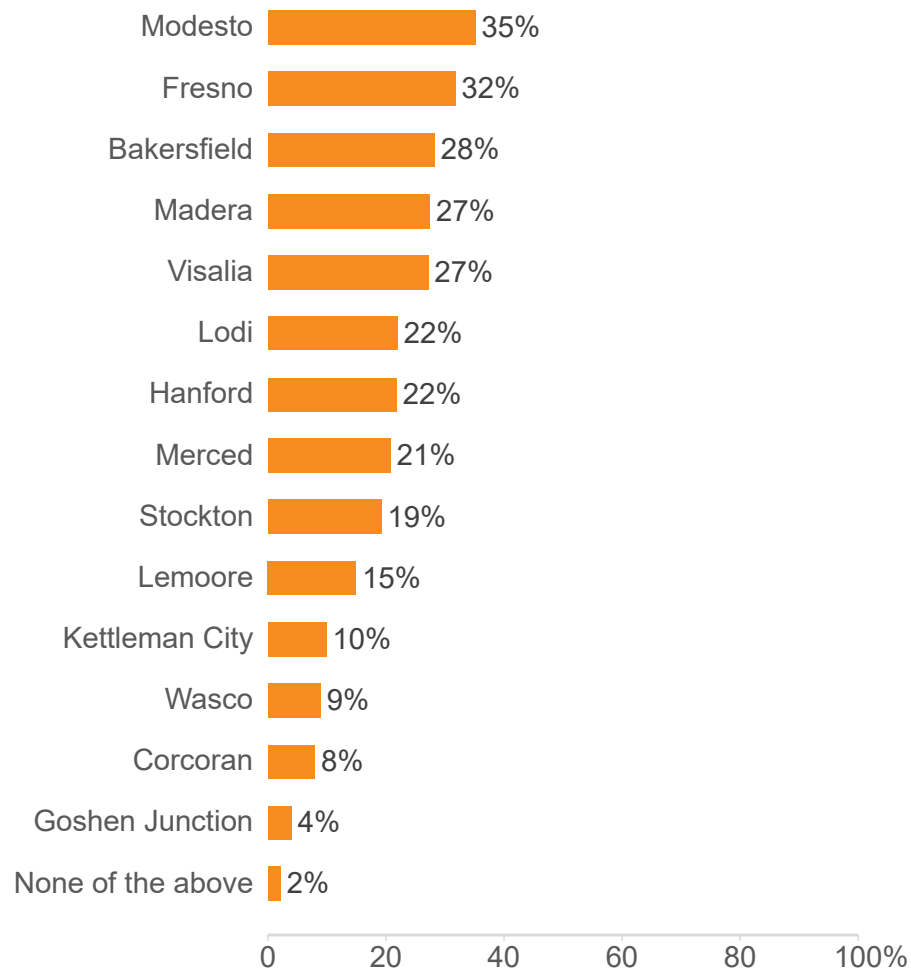
n = 377 (Respondents who recently took a trip to another California region and did not take Amtrak or would have considered Amtrak as an alternative mode of transportation.)

Intra-Valley Travel (within San Joaquins Valley)

Among respondents that live in the San Joaquin Valley and visited cities other than their own in the past year, Modesto and Fresno were the most popular destinations (see Figure 34). Table 2 shows the percentage of respondents who live in a San Joaquins city (column headers) who travelled to various San Joaquins Valley cities (rows). Only select home cities are shown because some home cities had too few respondents and sample sizes are too small. Among respondents who live in Bakersfield, over half (51%) have made a trip to Fresno and over a third (34%) have made a trip to Wasco in the past year. The most popular destinations in the past year among those who live in Fresno are Madera (61%), Visalia (50%), Bakersfield (46%), and Hanford (44%). Stockton and Merced are the most popular destinations among those who live in Modesto. On the other hand, Modesto is a popular destination among Stockton residents with 73% reporting a trip in the past year. A majority (77%) of Stockton residents have also visited Lodi in the past year (see Table 2 and Table 3).

A plurality (37%) of respondents made a trip to another city in the region for the purpose of business or commuting. Respondents are equally as likely to make trips to other cities for the purpose of leisure/vacation (26%) or visiting family/friends (24%, see Figure 35). Respondents typically traveled alone (36%) or with one other person (31%, see Figure 36).

FIGURE 34. CITIES IN SAN JOAQUIN VALLEY VISITED



n = 275 (Respondents who live in the San Joaquin Valley. Respondents select all that apply.)

TABLE 2: CITIES TRAVELED TO IN THE PAST YEAR BY HOME CITY

... TO DESTINATION CITY	FROM HOME CITY...					
		Bakersfield	Fresno	Modesto	Stockton	Overall
	Modesto	19%	40%	0%	73%	37%
	Fresno	51%	0%	33%	15%	30%
	Madera	20%	61%	32%	9%	30%
	Visalia	34%	50%	10%	2%	29%
	Bakersfield	0%	46%	24%	12%	27%
	Hanford	12%	44%	4%	8%	24%
	Lodi	8%	11%	37%	77%	24%
	Stockton	14%	20%	60%	0%	20%
	Merced	17%	35%	43%	7%	20%
	Lemoore	12%	25%	0%	8%	16%
	Kettleman City	8%	22%	0%	2%	10%
	Wasco	34%	4%	10%	0%	10%
	Corcoran	4%	15%	0%	7%	9%
	Goshen Junction	5%	3%	0%	0%	4%
	None of the above	5%	1%	4%	2%	2%
N	41	61	24	42	219	

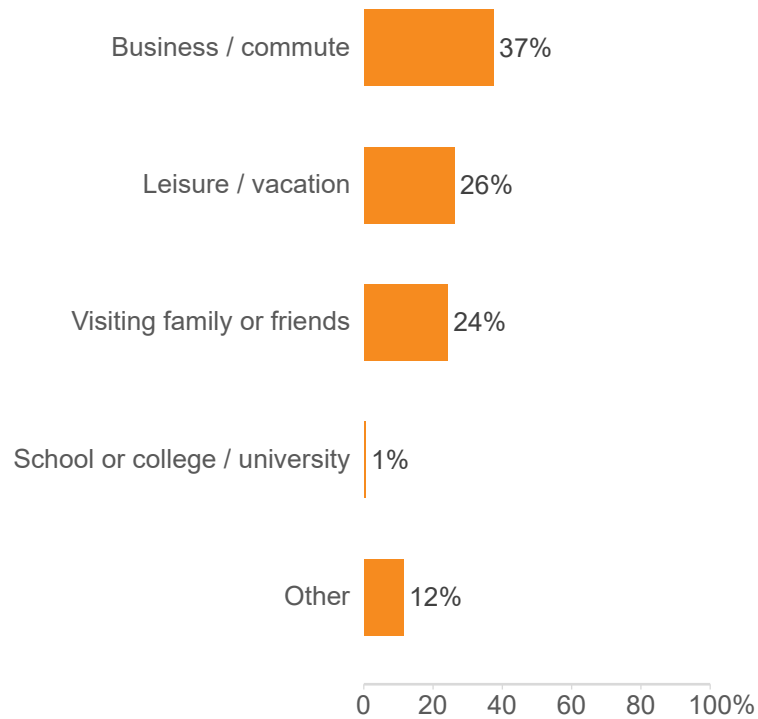
n = 221 (Respondents who live in the San Joaquin Valley and took a recent trip to a city other than their own in San Joaquin Valley. Respondents select all that apply.)

TABLE 3: TOP 10 HOME CITY-DESTINATION PAIRS

CITY PAIR (HOME – DESTINATION)	
Stockton - Lodi	77%
Stockton - Modesto	73%
Fresno - Madera	61%
Modesto - Stockton	60%
Bakersfield - Fresno	51%
Fresno - Visalia	50%
Fresno - Bakersfield	46%
Fresno - Hanford	44%
Modesto - Merced	43%
Fresno - Modesto	40%

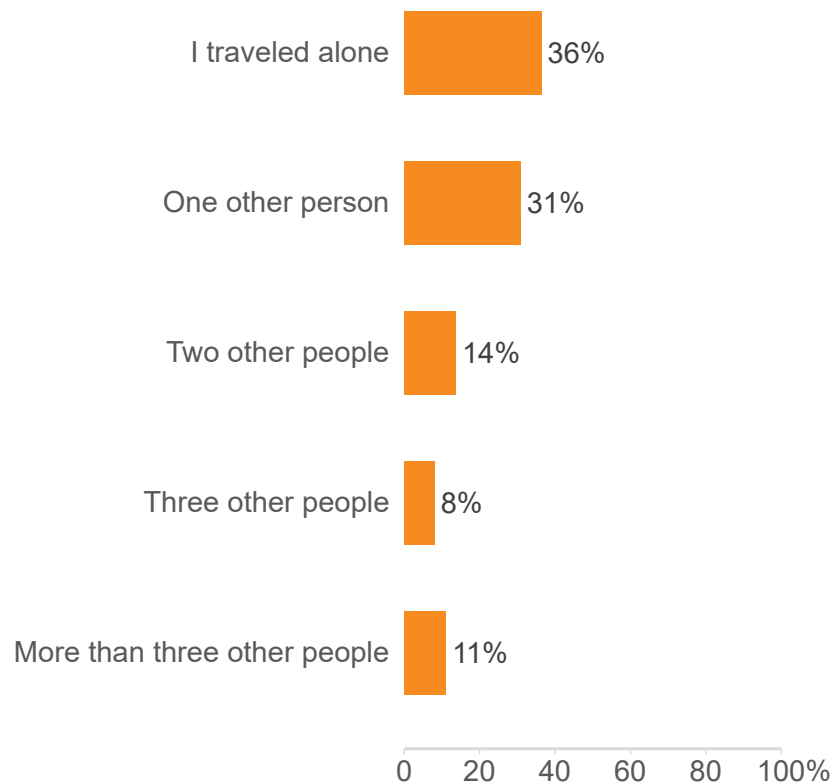
n = 221 (Respondents who live in the San Joaquin Valley and took a recent trip to a city other than their own in San Joaquin Valley. Respondents select all that apply.)

FIGURE 35: REASONS FOR TRIPS WITHIN THE SAN JOAQUIN VALLEY



n = 87 (Respondents who live in the San Joaquin Valley and took a recent trip to a city other than their own in San Joaquin Valley.)

FIGURE 36: PARTY SIZE OF TRIPS WITHIN THE SAN JOAQUIN VALLEY



n = 87 (Respondents who live in the San Joaquin Valley and took a recent trip to a city other than their own in San Joaquin Valley.)

Select Crosstabs

By Income

Although significant differences can be seen between income groups when looking at their awareness of other train services (respondents with higher income are more aware of the services), there is little difference in awareness of the San Joaquins, specifically (see Table 4). That is, regardless of whether respondents have a household income under or over \$50,000, about six in ten of them are aware of San Joaquins service, meaning that unlike other train services, the San Joaquins' services are equally known among residents of varying socioeconomic statuses.

When asked why they did not take the San Joaquins on their most recent, respondents with higher incomes reported that the train takes too long as one of their primary reasons (23% and 7% for higher vs. lower income respondents, respectively), whereas over a quarter of lower-

income respondents did not take it because they were not aware it was an option (28% and 23% for lower vs. higher income respondents, respectively). All respondents, regardless of income, also reported disliking having to plan around train schedules as a top reason for not taking the San Joaquins (see Table 5).

Regardless of income, respondents would ride more for lower fares (34%) and faster trips (29%). While there are some differences between lower and higher income groups in motivators (faster travel and easier travel between station and destination) these tend to be small (see Table 6).

TABLE 4. AWARENESS OF TRAIN SERVICES BY HOUSEHOLD INCOME

Service	Less than \$50K	\$50K or More	Total
Amtrak San Joaquins	64%	60%	62%
Amtrak Pacific Surfliner	48%	56%	53%
Caltrain	37%	59%	52%
Capitol Corridor	15%	29%	24%
ACE	16%	25%	22%
SMART	12%	24%	20%
Never heard of these routes	10%	7%	8%
N	206	400	606

Note: Respondents select all that apply.

TABLE 5. REASONS FOR NOT CONSIDERING THE SAN JOAQUINS BY HOUSEHOLD INCOME

Reason	Less than \$50K	\$50K or More	Total
Did not know Amtrak was a possibility	28%	23%	24%
Do not like having to plan around train schedules	21%	18%	19%
Destination was too far from any Amtrak stops or stations	16%	20%	19%
Takes too long	7%	23%	18%
Needed to make multiple stops	17%	16%	16%
Had to transport items	8%	16%	14%
Live too far away from any Amtrak stops or stations	12%	13%	13%
Do not like/am not interested in riding Amtrak	9%	11%	11%
Too expensive	10%	11%	10%
Worried about contracting COVID-19	6%	8%	7%
Unreliable	7%	5%	6%
Another reason	11%	10%	10%
N	101	275	376

Note: Respondents select all that apply.

TABLE 6: MOTIVATORS FOR STARTING TO USE/USING THE SAN JOAQUINS MORE BY HOUSEHOLD INCOME

Feature	Less than \$50K	\$50K or More	Total
Lower fares	32%	35%	34%
Faster travel	25%	31%	29%
Easier travel between station and home	18%	20%	20%
Easier travel between station and destination	23%	16%	18%
More reliable travel time	18%	17%	18%
Safer environment at the stations	13%	19%	17%
Safer environment onboard the trains	17%	13%	14%
Nicer / cleaner train stations	17%	11%	13%
Upgraded first-class service	17%	11%	13%
More frequent service	13%	13%	13%
More comfortable seats	13%	11%	12%
Schedule that better matches my needs	11%	11%	11%
Nicer / cleaner trains	11%	10%	11%
Better food / beverage service	9%	7%	8%
Other reason	4%	4%	4%
None of the above	7%	9%	8%
N	130	269	399

Note: Respondents select all that apply.

By Home Region

Respondents living in Los Angeles and the surrounding area used Amtrak more on their most recent trip (22%) and their personal vehicle less (49%) compared to respondents in other regions. Eight in ten respondents living in the San Joaquin Valley reported using their personal vehicle for the trip, more than respondents from any other region (see Table 7).

TABLE 7. PRIMARY MODE OF TRAVEL DURING MOST RECENT INTERREGIONAL TRIP BY HOME REGION

Mode	San Joaquin Valley	Bay Area / Silicon Valley	Los Angeles Area	Sacramento Area	Total
Personal vehicle	80%	55%	49%	58%	66%
Amtrak	10%	10%	22%	11%	13%
Plane	0%	17%	11%	19%	8%
Rental/company car	3%	8%	11%	5%	6%
Bus	2%	6%	2%	2%	3%
Other	4%	4%	4%	6%	4%
N	239	118	110	93	560

By Prior SJJPA Usage

Regardless of whether respondents have taken the San Joaquins in the past, the most common mode of travel on respondents' most recent trip is personal vehicle (66%). Nearly a quarter of respondents who had used San Joaquins in the past used it again on their most recent trip (24%, see Table 8).

A majority of respondents who have not used the San Joaquins in the past went on their most recent trip for the purpose of leisure or vacation (51%). Respondents who have used the San Joaquins in the past and respondents who have not used the San Joaquins in the past were equally as likely to report traveling to visit family or friends (31%). Those that have used the San Joaquins had more variety in the purpose of their most recent trip, with 45% traveling for leisure/vacation and 16% traveling for business or to commute. Just 8% of those that have never used San Joaquins traveled for business on their most recent trip (see Table 9).

Of respondents who had taken the San Joaquins in the past, significantly more report that upgraded first-class service would make them ride more often (18%), compared to those that had not (5%). They also perceive more reliable travel time as a greater motivator (20% vs. 13%, see Table 10).

Of respondents who had taken the San Joaquins in the past, but not on their most recent trip, or respondents who have never used Amtrak, almost a quarter said they did not know Amtrak was a possibility for their trip (24%). Respondents who have not used San Joaquins in the past were more likely to say they live too far from a stop or station (16%) or do not like / are disinterested in riding Amtrak (13%), compared to respondents who have taken it in the past but not during their most recent trip. Conversely, respondents who have used the San Joaquins in the past, but not for their most recent trip, cited worry of COVID-19 (17%) and unreliability (12%) more often than those who have never used the San Joaquins as a reason for not riding (see Table 11).

TABLE 8. PRIMARY MODE OF TRAVEL DURING MOST RECENT INTERREGIONAL TRIP BY PAST USAGE OF THE SAN JOAQUINS

Mode	Used SJ Train	Not Used SJ Train	Total
Personal vehicle	55%	75%	66%
Amtrak	24%	4%	13%
Plane	4%	11%	8%
Rental/company car	6%	6%	6%
Bus	6%	1%	3%
Other	5%	3%	4%
N	217	343	560

TABLE 9. PURPOSE OF MOST RECENT INTERREGIONAL TRIP BY PAST USAGE OF THE SAN JOAQUINS

Purpose	Used SJ Train	Not Used SJ Train	Total
Leisure/vacation	45%	51%	48%
Visiting family or friends	31%	31%	31%
Business/commute	16%	9%	12%
Other	8%	8%	8%
N	217	343	560

TABLE 10. MOTIVATORS FOR STARTING TO USE/USING THE SAN JOAQUINS MORE BY PAST USAGE OF SAN JOAQUINS

Feature	Used SJ Train	Not Used SJ Train	Total
Lower fares	33%	37%	35%
Faster travel	28%	31%	29%
Easier travel between station and home	18%	22%	19%
Easier travel between station and destination	18%	19%	18%
More reliable travel time	20%	13%	17%
Safer environment at the stations	19%	14%	17%
Safer environment onboard the trains	14%	14%	14%
Nicer / cleaner train stations	15%	9%	13%
Upgraded first-class service	18%	5%	13%
More frequent service	16%	9%	13%
More comfortable seats	14%	8%	11%
Schedule that better matches my needs	13%	10%	12%
Nicer / cleaner trains	9%	12%	11%
Better food / beverage service	10%	4%	8%
Other reason	3%	6%	4%
None of the above	5%	13%	8%
N	226	174	400

Note: Respondents select all that apply.

TABLE 11. REASONS FOR NOT CONSIDERING THE SAN JOAQUINS BY PAST USAGE OF SAN JOAQUINS

Reason	Used SJ Train	Not Used SJ Train	Total
Did not know Amtrak was a possibility	14%	29%	24%
Do not like planning around train schedules	17%	20%	19%
Destination too far from a stop or station	19%	19%	19%
Takes too long	17%	19%	18%
Needed to make multiple stops	18%	16%	16%
Had to transport items	19%	12%	14%
Live too far away from a stop or station	6%	16%	13%
Do not like / disinterested in riding Amtrak	4%	13%	11%
Too expensive	10%	10%	10%
Worried about COVID-19	17%	3%	7%
Unreliable	12%	3%	6%
Another reason	5%	12%	10%
N	98	279	377

Note: Respondents select all that apply.

By Trip Purpose

Respondents traveling for leisure or vacation were more likely to use a personal vehicle (72%) compared to those traveling for other reasons. Those traveling for work purposes are less likely to take a personal vehicle (41%, see Table 12).

TABLE 12. PRIMARY MODE OF TRAVEL DURING MOST RECENT INTERREGIONAL TRIP BY PURPOSE OF MOST RECENT INTERREGIONAL TRIP

Mode	Leisure / Vacation	Visiting Family / Friends	Business / Commute	Other	Total
Personal vehicle	72%	67%	41%	66%	66%
Amtrak	12%	14%	15%	8%	13%
Plane	7%	8%	17%	2%	8%
Rental/company car	2%	5%	19%	14%	6%
Bus	2%	3%	4%	4%	3%
Other	4%	3%	5%	5%	4%
N	276	169	69	46	560

By Age

The use of a personal vehicle increases with age (55% for under 35, 69% between 35-54, and 75% for 55 and above. To the contrary, the use of Amtrak does not substantially vary by age (13% overall, see Table 13).

Respondents over 55 heard about the San Joaquins through online searches (11%) or online trip planners (5%) significantly less than younger respondents. However, older adults are relatively more likely to hear about the San Joaquins on the radio (15% vs. 4% for 55 and older vs. under 35 years old, see Table 14).

TABLE 13. PRIMARY MODE OF TRAVEL DURING MOST RECENT INTERREGIONAL TRIP BY AGE

Mode	Under 35	35 – 54	55+	Total
Personal vehicle	55%	69%	75%	66%
Amtrak	13%	14%	11%	13%
Plane	6%	8%	10%	8%
Rental/company car	12%	5%	1%	6%
Bus	6%	3%	1%	3%
Other	9%	2%	2%	4%
N	162	215	183	560

TABLE 14. HOW RESPONDENTS HEARD ABOUT THE SAN JOAQUINS BY AGE

Source	Under 35	35 – 54	55+	Total
Word of mouth	25%	39%	39%	34%
Amtrak website or app	30%	35%	36%	34%
Online search	23%	27%	11%	21%
Social media	22%	17%	9%	16%
Online trip planner	15%	19%	5%	14%
Television	11%	13%	15%	13%
Radio	4%	12%	15%	10%
Billboard / outdoor sign	11%	10%	5%	9%
Online advertisement	13%	7%	6%	9%
Print advertisement	6%	4%	4%	5%
Other exposure	10%	6%	12%	9%
N	118	145	137	400

Note: Respondents select all that apply.

4.0 CONCLUSION

Results from this survey can be used to gain a comprehensive understanding of San Joaquins ridership, highlight differences in demographic and geographic characteristics, and identify opportunities for San Joaquins service improvement and expansion. The majority of respondents are aware of the San Joaquins, and about four in ten have used the service. 69% of respondents that have ridden the San Joaquins are satisfied with the service overall, but when asked about specific attributes, only about half of respondents are satisfied with the Café Car. Despite this dissatisfaction, very few respondents say they would ride more if it were improved. Lower fares, faster trips, and easier transportation between the Amtrak station and origin/destination points are important to respondents in terms of what they would start riding/ride more for. Close to half of respondents travel for leisure or vacation, and the majority drove a personal vehicle during their last interregional trip. However, when asked about advantages of train travel, over half of respondents report not having to drive and being able to avoid traffic congestion. Taking this into consideration, respondents could be motivated to use the San Joaquins for their travel purposes. In fact, nearly a quarter of respondents said they would have used the San Joaquins for their most recent trip if the way they traveled was not available. The top reason respondents did not consider the San Joaquins for their trip was due to not knowing it was a possibility. Further increasing awareness of San Joaquins service may be one way to increase ridership. Overall, this report provides a number of insights into the travel needs and habits of residents in San Joaquins' primary geographical markets.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 7

INFORMATION

Update and Discussion of Next Steps for Central Valley Region Outreach Services

The San Joaquin Joint Powers Authority (Authority) contracts with KP Public Affairs (KP) to provide outreach, stakeholder engagement, marketing, and communications activities in the Central Valley region. KP will provide a presentation outlining key areas of activity and the strategic approach for reaching potential passengers, engaging third-party stakeholders, leveraging key partnerships, communicating with media, and telling the story of the Amtrak San Joaquins in a positive way to build ridership and build support for the service as it plays an increasingly large role in California's transportation network. There are several areas of focus for the outreach and communications activities:

Boots on the Ground Efforts: Throughout the year, the team is present at selected community events to speak directly with stakeholders, learn about impediments to ridership, and help erode barriers. These events allow the team to engage with hard-to-reach audiences, garner interest from first-time riders, and answer questions about the service. Additionally, the team manages a Mercado outreach program to provide information directly to the Latino community, which makes up a large portion of Amtrak San Joaquins ridership.

Grassroots Outreach, Community Building, and Information Dissemination: The KP team works to build Amtrak San Joaquins' presence within the community and provide resources to stakeholders so they can amplify our information through their networks. There are outreach waves aimed at different ridership populations (such as students, seniors, veterans, and disabled riders) – and the team manages formal and informal partnerships. The program includes regular creation of social media content, outreach toolkits, and blog content. Engagement also occurs with statewide and city elected officials, Public Information Officers, city staff, and the transit agencies that connect with the service.

Media Outreach: The team provides media outreach to highlight special events such as the recent Allensworth train, help manage inquiries on stories such as Valley Rail, the venture cars, and rail strike etc., promote media attention on the bus-only ticketing enhancements, and other topics.

Thruway Bus Route Outreach: The team created a foundation for a heightened level of outreach and engagement along the Amtrak San Joaquins Thruway bus routes. This included conducting extensive research to assess key community stakeholders, advertising and grassroots outreach opportunities, local media contacts, destinations, and potential community partners. The team is now engaging in continued outreach moving forward, while also providing project management and administration of the thruway bus route outreach being conducted by the Authority's other outreach consulting teams throughout the state.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 8

INFORMATION

Sustainable Transportation Planning Grants Awards for 2023

Background:

On August 31, 2023, Caltrans announced the award of \$20.2 million in Sustainable Communities Competitive and Technical Grants to 56 local, regional, tribal, and transit agencies for transportation and land use planning, as well as planning for electric vehicle charging infrastructure.

The San Joaquin Joint Powers Authority (Authority) partnered with local/regional agencies on three applications for the 2023 Sustainable Transportation Program cycle and was successful with all three of these applications. Work on these planning efforts is expected to begin in 2024. Authority staff led the development of the applications and getting letters of support. The three planning applications are summarized below.

1. Kings -Tulare HSR Station Transit-Oriented Development and Connectivity Plan and Cross Valley Corridor Rail Service Planning (\$650,000):

This application was submitted by the City of Hanford in partnership with the Authority, California High-Speed Rail Authority (CHSRA), Kings County Association of Governments, Tulare County Association of Governments, Fresno Council of Governments, Kings County Area Public Transit Agency (KCAPTA), and Tulare County Regional Transit Agency.

The Kings-Tulare HSR Station Transit-Oriented Development and Connectivity Plan and Cross Valley Corridor Rail Service Planning (Project) will build upon planning efforts for the Kings-Tulare High-Speed Rail (HSR) Station and Cross Valley Corridor (CVC) to identify recommendations for connecting transit services between Downtown Hanford and the Kings-Tulare HSR Station and along the CVC and promote transit-oriented development (TOD) around the Kings-Tulare HSR Station and along the Lacey Boulevard Corridor. This Project will also help advance regional transit connectivity between Porterville and Huron through a supplemental planning study that will work towards implementing CVC Rail Service via short-, mid-, and long-term strategies that will consist of an implementation plan, station siting analyses, utility coordination, and environmental screening.

2. Del Paso Multimodal Transportation Network and Land Use Compatibility Action Plan (\$450,000):

This application was submitted by Sacramento Area Council of Governments (SACOG). The planning work will be led by the San Joaquin Regional Rail Commission (SJRRRC) in partnership with its in-kind contributing partners: City of Sacramento, Sacramento Regional Transit District (SacRT), SACOG, and the Authority.

The proposed Del Paso Multimodal Transportation Network and Land Use Compatibility Action Plan (Project) will build on the Valley Rail Project and SACOG's Green Means Go Program to integrate the future rail network and stations within the Del Paso neighborhood and enhance multimodal connectivity between the proposed Valley Rail "Old North Sacramento Station" and two existing SacRT light rail stations for Globe Avenue and Arden/Del Paso. This Project will identify infrastructure and programmatic recommendations to improve access, safety, and advance transit supportive land uses, including joint-development at the Old North Sacramento station and transit-oriented developments (TODs). This effort will seek development of a safe and vibrant community that encourages infill growth, reduces vehicle ownership reliance, and encourages walking and biking between local and regional transit services.

3. Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan (\$450,000):

This application was submitted by San Joaquin Council of Governments (SJCOG). The planning work will be led by the City of Stockton in partnership with its in-kind contributing partners: SJRRC, San Joaquin RTD, SJCOG, and the Authority.

The proposed Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan (Project) will build on the efforts of the Valley Rail Expansion Program to integrate the future rail network and its operations with the Cabral Station, Downtown Transit Center (DTC), and surrounding transportation network and land use within Downtown Stockton.

This Project will directly engage with disadvantaged communities and identify infrastructure and programmatic recommendations to build cohesion between the future multimodal transportation network and proposed land use, including joint-development and transit-oriented developments (TODs), that are adapted for the Downtown Stockton context. The existing project area lacks cohesion between land use and infrastructure and requires planning and investments that can be prioritized and delivered by the Project to encourage revitalization consistent with the implementation of Valley Rail. This effort will seek development of a safe and vibrant community that encourages infill growth, reduces vehicle ownership reliance, and encourages walking and biking between local and regional transit services.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 9

INFORMATION

Rail Safety Month Presentation

Background:

Annually, the month of September is designated as “Rail Safety Month.” Railroad, Transit, and other organizations focus their efforts on educating and alerting the public to the importance of safety around the railroad and rail facilities. A key organizer of these efforts is Operation Lifesaver (OL). OL is a non-profit organization and nationally recognized leader of rail safety education. Since 1972, OL has been committed to preventing collisions, injuries and fatalities on and around railroad tracks and highway-rail grade crossings, with the support of public education programs in states across the U.S.

During the 2023 Rail Safety Month, the San Joaquin Joint Powers Authority (Authority), is partnering with the Capital Corridor Joint Powers Authority (CCJPA), San Joaquin Regional Rail Commission (Rail Commission) and California Operation Lifesaver (CAOL). CAOL is the local chapter of Operation Lifesaver dedicated to its mission in California. CAOL Executive Director, Nancy Sheehan and staff kicked off Rail Safety Month by conducting outreach to stakeholder groups along the San Joaquins corridor. Staff utilized a CAOL group list, as well as its own list of stakeholder groups to conduct outreach efforts to engage groups for a ‘Red Shirt Competition.’ The Red Shirt Competition’s goal is to help spread the importance of Rail Safety by activating local stakeholder groups in key areas of the corridor. The stakeholder groups will attend a CAOL presentation in order to be eligible to participate. The stakeholder group will then post a picture to their respective social media channel wearing red and using the Authority’s unique hashtags in support of Rail Safety Month. Additionally, staff will release a press release sharing the importance of rail safety along with the competition results.

Staff will be utilizing the San Joaquins social channels to magnify the Rail Safety message by featuring a unique rail safety topic each week, engaging with passengers via social media efforts using CAOL approved hashtags, amplifying #RallyforRailSafety as the agencies main slogan in showing support for the campaign. The Authority, Rail Commission, and CAOL will continue to partner together in efforts to spread awareness to the public about respecting the railroads and staying safe around railroads and railroad facilities. Staff will provide a presentation of the Authority social efforts throughout the month of September.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.

SAN JOAQUIN JOINT POWERS AUTHORITY

Meeting of September 22, 2023

STAFF REPORT

Item 10

INFORMATION

Update on Venture Cars Deployment

Background:

Staff will provide an update on the deployment of the Caltrans Venture Cars at the September 22, 2023, San Joaquin Joint Powers Authority board meeting.

Fiscal Impact:

There is no fiscal impact.

Recommendation:

This is an informational item. There is no action requested.