

PUBLIC REVIEW DRAFT

SAN JOAQUIN JOINT POWERS AUTHORITY

2025 BUSINESS PLAN UPDATE



PREPARED FOR CALIFORNIA STATE TRANSPORTATION AGENCY
UPDATED FOR FY 25/26 & FY 26/27



EXECUTIVE SUMMARY

The purpose of this 2025 San Joaquin Joint Powers Authority (SJJPA) Business Plan Update (“Business Plan”) is to identify SJJPA’s intentions for State Fiscal Year (FY) 2025/26 and FY 2026/27 in its management of the San Joaquins Intercity Passenger Rail Service (San Joaquins) and to request the annual funds required by SJJPA to operate, administer, and market the San Joaquins. This Business Plan also describes planned service and capital improvements to ensure the continued success and future growth of the San Joaquins. This Business Plan was submitted to the Secretary of the California State Transportation Agency (CalSTA) in draft form before April 1st, 2025 and will be submitted in final form by June 30th, 2025.

Administrative Role

The primary role of the SJJPA is the day-day management of the San Joaquins. In 2019, SJJPA selected the San Joaquin Regional Rail Commission (SJRRRC) as its Managing Agency for an additional five-year term (September 27, 2019 – September 27, 2024) after an initial two 3-year terms. For continuity purposes and given close coordination of SJJPA and SJRRRC in many various efforts, the SJJPA Board approved Amendment 3 to the agreement for a five (5) year extension at their May 17, 2024 Board meeting. SJRRRC’s consolidated agency approach results in the most efficient and cost-efficient management of the San Joaquin Valley’s two passenger rail services and streamlines planning and programming efforts to deliver the “Vally Rail” expansion program. SJJPA will provide the level of service consistent with funding appropriated by the State and any cost savings identified by SJJPA or revenues in excess of the Business Plan projections, which may be used by SJJPA for service improvements in the San Joaquins corridor.

Operating Plan, COVID-19 Impacts, 8th and 9th Daily Round-Trips, and Short-Term Service Improvements

The San Joaquins have great potential for increased ridership, revenue, service coordination, and performance. SJJPA is currently implementing a number of strategies to improve the San Joaquins. Some of the strategies require little or no additional resources, including improved schedules and reduced trip lengths, reduced travel times, improved train monitoring, train and connecting bus schedule adjustments, and improved service coordination. SJJPA is also in the process of pursuing a significant expansion of service for the San Joaquins, including implementation of the 8th and 9th Daily round-trips. Planned expansion of the San Joaquins Service is fully coordinated and consistent with the 2018 California State Rail Plan and the CHSRA’s Draft 2024 Business Plan. In 2025, SJJPA completed a phased service plan for up to 12 round-trips on the BNSF Railway that will serve as the basis for further intercity corridor planning lead by Caltrans as part of the FRA Corridor Identification and Development Program, as well as coordination with the host railroads based on the latest scheduling assumptions for the larger Valley Rail Program. Safety continues to be a focus and SJJPA is engaging in partnerships with Amtrak and the host railroads to reduce incidents along the corridor.

COVID-19’s Impact on the San Joaquins: On March 4, 2020, Governor Gavin Newsom declared a state of emergency in response to the COVID-19 outbreak. On March 19, 2020, the Governor issued a statewide mandatory stay-at-home order to reduce the spread of the outbreak in California. On March 26, 2020, SJJPA staff directed Amtrak to reduce San Joaquins service from 7 daily round-trips to 4 daily round-trips, reduce Thruway Bus service, and to institute other various health and safety measures to ensure the safety of San Joaquins passengers and operational staff onboard trains that remained in service. Café Car Service was suspended to reduce risks from food handling and unnecessary onboard passenger movement, with emergency snack packs and water being distributed to passengers free of charge. With anticipation of long-term suspension of food service on certain daily trains due to removal of Horizon Diners from the equipment pool and lack of food service cars for the initial operations of the Siemens Venture Cars, SJJPA launched a more substantial, locally sourced Snack Box on July 14, 2021. Several stations were temporarily closed, and the thruway bus network was reduced

in both corridors served and frequencies in response to the severe ridership reductions the San Joaquins experienced during the pandemic.

As with passenger rail and transit services across the country, the San Joaquins experienced a sharp, sustained decline in ridership and revenue during the COVID-19 pandemic. Though the San Joaquins had sustained a significant decline, it has consistently performed at the top of the Amtrak National Network due to its core ridership depending on it for essential transportation needs. The San Joaquins reached its low in ridership in the third week of April 2020 at –90% compared to the previous year. In FY20/21 and FY21/22, the San Joaquins slowly recovered ridership with a few setbacks during periods of increased COVID-19 cases and subsequent health orders restricting travel. The San Joaquins reached a peak in ridership recovery in October 2022 by recovering 86% of ridership when compared to October 2019. The San Joaquins continues to progress in ridership return month-over-month with forecasted numbers to reach 84% recovery for FY23. The San Joaquins ridership performance is particularly positive considering it is operating with one less round-trip and a reduced thruway bus network.

In State Fiscal Year 2021/2022, SJJPA staff, in coordination with Caltrans, CalSTA and the other JPAs, created a service restoration plan to return San Joaquins service back to pre-pandemic levels from the 4 daily round-trips and the reduced thruway bus network. The effort resulted in the 5th round-trip between Bakersfield and Oakland returning to service on June 22, 2021, and the restoration of direct train service to Sacramento with the 6th round-trip on October 18, 2021. The 7th pre-pandemic round-trip is planned to be restored in the fall of 2025. The reintroduction of the 7th round-trip is a restoration of pre-pandemic service levels and not considered start of new/expanded service. In addition to the restoration of train service, SJJPA oversaw the reintroduction of suspended Thruway Bus service to complement the restored round-trips, and will respond in-kind to this full restoration of train service with additional thruway service. Additionally, SJJPA will continue to maintain the viability of the overall Thruway Bus Network by reducing operational costs on underperforming routes while maintaining services in strong ridership corridors and markets.

Strategic Goals and Objectives for the San Joaquins: The San Joaquins provides essential transportation services through intercity rail and thruway bus connections throughout the State of California. To deliver quality service to passengers, SJJPA continually monitors performance of each train, ridership across the service network, coordinates with local stakeholders in the rail and bus corridors, and planning efforts for continued service improvements, expansions, and station area planning. These efforts combined help deliver an alternative for travel across California and will bring even more possibilities when further service and connectivity is provided to High-Speed Rail (HSR).

As SJJPA drives the strategic goals and objectives forward, a continued focus on the passenger and their experience is key, while also delivering trusted, reliable, and essential service while giving people the freedom to affordably connect across California. These interconnected goals are ingrained in the spirit of a new set of Vision, Mission, and Values that guide the agency in all aspects of work:

Vision - Connecting California Communities through multi-modal transportation

Mission - Deliver California's accessible, connected, and sustainable future by providing multi-modal transportation

Values - Collaboration, Responsibility, Resilience, Sustainability, Diversity and Community

SJJPA is committed to building upon a legacy of reliable transportation connections within the Central Valley and to much of California, and future expansion of service will only enhance this record and continue to be a vital link for Californians across the state.

8th and 9th Daily Round-Trips: A significant increase in ridership is anticipated if the frequency of service to Sacramento can be increased and offered at the right times of the day. SJJPA is currently working to implement the improvements needed to enable the 8th and 9th Daily round-trips, which will allow a doubling of trains serving Sacramento from two to four. As part of this effort, SJJPA explored using the Sacramento Subdivision between

Sacramento and Stockton for expanded passenger rail service in coordination with CalSTA, CHSRA, Caltrans, Central Valley Rail Working Group, and Sacramento Regional Rail Working Group. This resulted in SJJPA's Board formally adopting the Sacramento Subdivision as the preferred corridor for future passenger rail expansion in 2017. To implement the 8th and 9th Daily round-trips and necessary improvements along the Sacramento Subdivision, SJJPA submitted a Transit and Intercity Rail Capital Program (TIRCP) grant application in January 2018. On April 26, 2018, CalSTA awarded \$500.5 million to SJJPA/SJRRC for the "Valley Rail" project which is funding these improvements. Since this initial award, additional Federal and State grants have been obtained to increase the total funding of the Valley Rail Program to over \$1.8 billion. SJJPA and SJRRC will continue to apply for more funding to fully fund all projects in the Valley Rail program.

The schedule to be developed for the 8th and 9th Route-Trips is based on a pulsed-service approach which provides more efficient operations, better use of infrastructure, and improved on-time performance. Initial service for the 8th and 9th round-trips would run between Sacramento and Stockton (to meet San Joaquins trains at the San Joaquin Street Station) and would not extend south until High-Speed Rail service is initiated to Merced. In early 2025, SJJPA prepared a service plan for the San Joaquin Corridor for up to 12 round-trips, which included analysis of phased infrastructure delivery required prior to these additional trips extending past Stockton. This service plan will serve as the basis for further analysis necessary to fund and implement improvements, including coordination with Caltrans for preparation of the Service Development Plan required as part of the Federal Corridor Identification and Development Program.

Additional key short-term programs for the San Joaquins include:

Thruway Bus Partnerships: SJJPA is exploring ways to maximize the utilization of the San Joaquins' Thruway Bus network and other connecting bus services. SJJPA successfully worked with Senator Allen, RailPAC, Central Valley Rail Working Group, and San Joaquin Valley Regional Planning Agencies' Directors' Committee on getting legislation (SB 742) passed and signed by the Governor that enables bus-only tickets to be sold on state-supported Thruway Bus services. After the impacts of COVID-19 were reduced, SJJPA began coordinating with private intercity bus providers and public local and regional bus providers to resume the implementation of the provisions of SB 742. Through coordination with the State and regional transportation agencies, SJJPA is currently pursuing partnerships with several regions to optimize bus connections for San Joaquins passengers that would allow non-train passengers to utilize excess seating capacity in key corridors or utilize the services of an existing outside bus provider. SJJPA, in coordination with the Redding Area Bus Authority (RABA) and the Shasta Regional Transportation Agency (SRTA), are in the process of creating a partnership that would allow SJJPA to shorten Thruway Bus Route 3 by terminating in Chico rather than in Redding, while San Joaquins passengers traveling to Red Bluff or Redding would be able to take SRTA's new North State Express Bus (Salmon Runner) service. SJJPA would support the operations of the new service with cost savings realized from the reduction in the length of Thruway Bus Route 3. SJJPA will continue to focus on all Route 3 bus stop pairs to be opened for bus-only ticketing. While the COVID-19 pandemic had delayed progress on these efforts, recent efforts and coordination to move these service adjustments forward have been realized, with initial changes occurring in 2024. Additional work on Route 6 and 7 service changes are also proposed for this fiscal year. Additional efforts will also focus on exploring reinstating Route 34 (San Francisco to Stockton) and the creation of Route 40 (San Jose to Merced). SJJPA will also work with the CCJPA and Greyhound to relocate the bus terminal in San Francisco to inside the Salesforce Transit Center.

Renewable Diesel Implementation: SJJPA is committed to meet California's Greenhouse Gas (GHG) emission reduction goals. Utilizing renewable diesel in locomotives and in the Thruway Bus fleet will help to advance this objective. Starting in 2022, all new RFPs require renewable diesel for contracted services for all thruway buses. All locomotives on the San Joaquins have been utilizing renewable diesel since

May 2023. SJJPA is also requiring the use of renewable diesel for all future Thruway Bus contracts to further reduce the San Joaquins system's carbon footprint.

Madera High-Speed Rail (HSR) Station Project: SJJPA is working with Madera County, Madera County Transportation Commission, and CalSTA to relocate the Madera Amtrak Station to a more accessible location along Avenue 12 as Phase 1 of the Madera HSR Station Project. SJJPA is responsible for securing the necessary funding and implementing the Madera HSR Station. The relocated San Joaquins station will be substantially further improved to become the Madera HSR Station for the HSR Early Operating Segment (EOS) by 2030 – 2033 (Phase 2). SJJPA approved the Madera HSR Station environment review document at the January 22, 2021, Board Meeting for Phases 1 and 2, and final design is nearly completed for Phase 1. Recent funding awards will allow the relocated station to begin construction in 2025, the additional funding (\$134.5 million) for the improvements needed for the Phase 2 HSR EOS Station was secured in 2024. SJJPA also initiated the CEQA process for the full-build HSR Madera Station (Phase 3) in late 2023. SJJPA received funding in FY 2022/23 to advance this required additional environmental work.

Merced to San Jose Thruway Bus Route Pilot Program: SJJPA is requesting funding from the state for a pilot program to operate a new Thruway bus service between Merced and San Jose (with stops at Los Banos and Gilroy). The Merced to San Jose Thruway Bus Pilot Program will begin service in conjunction with the reintroduction of the 7th daily round-trip anticipated in Fall 2025. The service will start initially with three daily round-trips.

Integration with High-Speed Rail: Like other high-speed rail (HSR) services throughout the world, California will need to have extensive networks of conventional intercity and commuter rail networks that complement and provide “feeder” service to the proposed HSR system for it to be successful. SJJPA believes the San Joaquins provide important connectivity that is critical to the phased implementation of HSR in California. A Joint Policy Statement, which was adopted by California High-Speed Rail Authority (CHSRA), SJJPA, and Caltrans on July 26, 2013, is intended to ensure cooperation and input of local communities on all decisions related to any changes in the San Joaquins service and consistent planning between these agencies. SJJPA coordinated and partnered with CHSRA on the development of their Draft 2024 Business Plan which proposes Merced-Bakersfield HSR EOS in advance of completing their Valley –Valley Operating Segment between San Francisco and Bakersfield. Integration with the San Joaquins rail and Thruway Bus services maximizes the ridership and benefits of the Merced-Bakersfield HSR EOS. SJJPA's plan is to connect to the HSR EOS at a multi-modal station at downtown Merced (R Street). Once the HSR EOS is operating, the San Joaquins rail service would terminate at Merced and would provide rail connectivity for the HSR interim operating segment to Sacramento and the Bay Area until HSR is extended. Future San Joaquins service improvements would focus on increasing service from Merced to the North. Ongoing coordination with CHSRA and CalSTA for SJJPA to become the operating agency for the Merced-Bakersfield HSR EOS will continue in alignment with timing and agreement schedules. SJJPA is requesting additional planning funding in FY 2025/26 to continue to coordinate with CHSRA and CalSTA and to advance station and operations planning for initial HSR service.

Merced Intermodal Track Connector (MITC) Project: SJJPA received funding in FY 2022/23 and in FY 2023/24 for the detailed design and environmental clearance of the MITC Project. The MITC project will enable the San Joaquins to connect with interim HSR operations at Merced by creating a direct link between the BNSF alignment and the Merced HSR Station. This project is critical for integrating the San Joaquins with the Merced-Bakersfield HSR Early Operating Segment (EOS) and includes a platform-to-platform transfer for passengers between the two systems. The CEQA process for the MITC Project began on January 5, 2023 and the draft environmental impact report (EIR) was released July 17, 2024.

Stockton Diamond Grade Separation Project: This project is the grade separation of the intersection of the BNSF Stockton Subdivision and the Union Pacific (UP) Fresno Subdivision in south Stockton. This

junction is the most heavily congested freight bottleneck in California. In addition to substantial freight and environmental benefits, this project will enable future expansion of ACE and San Joaquins services without the impediment of the busy at-grade intersection. In partnership with the SJJPA, SJRRC and Caltrans pursued and received \$120 million in state and federal funding in 2020 to implement this critical project. Valley Rail funding will be used as match funding. The environmental and detailed design are being funded through ITIP funds appropriated in 2020. The environmental impact report (EIR) was certified by SJRRC on June 4, 2021. The environmental assessment (EA) for NEPA Clearance was completed in August 2022. The project is substantially funded and construction is targeted to begin in 2025, pending approval from all funding partners.

Cross-Valley Corridor: As a result of the “South of Merced Integration Study” effort, SJJPA has entered into a Memorandum of Understanding (MOU) with Kings CAG, Kings County Area Public Transit Agency (KCAPTA), Tulare CAG, Tulare County Region Transit Agency, and Visalia Transit to partner in the development of the Cross-Valley Corridor Phase 1 Bus Service and the planning and implementation of the Cross-Valley Rail Project. The Phase 1 Service planning is near completion and funding will be sought to implement the service. SJJPA also committed to working with KCAPTA and Visalia Transit and has received state funds to provide increased local/regional transit connectivity for the San Joaquins between Hanford and Visalia. In 2023, SJJPA partnered with the City of Hanford, King-Tulare MOU partner agencies, and CHSRA on a successful Caltrans Sustainable Communities Planning grant for Kings-Tulare HSR station area and Cross Valley Rail (Porterville – Huron) planning. The City of Hanford will be the lead agency for this study effort and SJJPA will take a leadership role in the Cross Valley Rail planning portion of the study, which will be completed in 2025.

Venture Railcars: The State is in the process of accepting 49 Siemens Venture Cars as part of a grant provided by the Federal Railroad Administration (FRA), along with various State funds, to be deployed exclusively on the San Joaquins corridor. Currently there are four (4) Venture Car trainsets rotating in revenue service on the San Joaquins corridor. As the remaining trainsets are accepted, they will enter revenue service, with all trainsets anticipated to be delivered in early 2026, with all seven (7) trainsets anticipated to be available for revenue service in mid-2026. Additionally, Caltrans entered into an agreement with the SJJPA to perform Venture Railcar Maintenance for all Venture Cars that are deployed exclusively on the San Joaquins corridor.

Northern California Passenger Rail Fleet Maintenance: SJJPA serves to ensure that the State’s Northern California fleet is operated and maintained to high standards of reliability, cleanliness, and safety. Additionally, Caltrans has requested SJJPA assume maintenance responsibilities including heavy maintenance activities of the State-Owned Northern California Legacy Fleet of 86 passenger rail cars, 24 locomotives and 2 Non-Powered Control Units (NPCUs). As a result of this request, Caltrans, CCJPA and Amtrak have been and are working on transitioning maintenance responsibilities of the Northern California State-Owned Passenger Rail fleet to SJJPA. This transition will allow Amtrak to begin overhaul work in California on passenger cars and locomotives on the West Coast.

Performance Standards and Action Plan

CalSTA created a set of uniform performance standards in 2014 for all state-supported intercity passenger rail corridors in an effort to control costs and improve efficiency. The three primary uniform performance standard measures used are: usage, cost efficiency, and service quality. SJJPA has adopted the CalSTA performance standards and will continue to develop strategies to maintain the successful performance of the San Joaquins. In addition to meeting CalSTA’s performance standards, SJJPA is also focused on the environmental benefit of the San Joaquins and its role in helping to create a more sustainable California by working to reducing air pollution and greenhouse gas emissions and help to encourage sustainable, transit-oriented development.

SJJPA's FY 2024/25 and FY 2025/26 "Action Plan" includes:

- Negotiate additional revisions to the Amtrak operating agreement to improve performance reporting and decrease operating costs, while also planning to reinvest these savings to improve service.
- Work with CalSTA, Caltrans, Amtrak, BNSF and UPRR to restore San Joaquins service to pre-COVID-19 levels.
- Continue to work jointly with the CHSRA, Caltrans, and CalSTA to develop viable strategies and solutions to support phased implementation of high-speed rail and to meet the needs of the San Joaquins and the stakeholder communities of the San Joaquins Corridor. This includes continuing Network Integration planning, EOS operations planning and detailed agreements, and coordination to support the success of the Merced-Bakersfield HSR EOS.
- Complete the environmental and initial design work for the MITC Project.
- Coordination with Caltrans as an essential stakeholder in the Federal Railroad Administration's (FRA) Corridor ID Program for the intercity service envisioned in the SJJPA's 10-year capital improvement program, Valley Rail, and North Valley Rail.
- Implement Valley Rail improvements needed for the planned 8th and 9th Daily round-trips in conjunction with UPRR, BNSF, Amtrak, and the State, and seek funding for improvements to enable further expansion of the San Joaquins between Merced and Sacramento to increase connectivity to HSR EOS.
- Support state efforts to transition to a zero-emission fleet for rail services as the first corridor to run hydrogen-powered trains for intercity passenger rail service in the United States.
- Work with Caltrans and CCJPA to develop a funding plan and timeline for implementation for enabling trains to be turned in Martinez, California. Continue to coordinate with UPRR, BNSF, and Amtrak on schedule and train performance.
- Coordinate with state and regional partner agencies to advance planning and implementation of express intercity bus service along the Interstate 5 Corridor between Redding and Sacramento to replace intercity bus connections operated by RABA between Chico and Redding.
- Implement a pilot program for an additional Thruway Bus route to serve passengers from Southern San Joaquin Valley and Southern California via Merced to Silicon Valley terminating in San Jose with stops at Los Banos and Gilroy.
- Continue to explore new partnerships with public or private bus operators and implement the provisions of SB 742 with the goal of allowing non-Amtrak passengers to utilize excess seating capacity on buses that connect with San Joaquins trains to save on operations costs.
- Monitor and expand the programs with transit agencies to improve and promote connectivity between the trains and local transit services and pursue additional Caltrans Sustainable Planning grant(s) to study increased connectivity at San Joaquins stations focusing on improving service to underserved disadvantaged/priority populations.
- Partner with SJRRC, SACOG, Sacramento Regional Transit (Sac RT) and the City of Sacramento on a grant-funded planning effort near the planned Old North Sacramento station of the Valley Rail Program to enhance connectivity and land use compatibility around this critical station area.
- Work with UPRR, BNSF, Amtrak, and State to grow ridership and revenue by improving reliability, adjusting the service plan, and/or implementing projects that add capacity and reduce travel times.

- Continue the deployment and marketing of new Venture Car trainsets.
- Continue to work with CHSRA, Amtrak, the City and County of Madera, and CalSTA to relocate the Amtrak Madera station at Avenue 12 (Madera HSR Station Phase 1) that would provide a seamless connection between the San Joaquins and future high-speed rail service, as well as improved access over the existing Madera Amtrak Station.

Capital Improvement Programs

Based upon the planned service expansions and enhancements, SJJPA has developed a “10-Year Capital Improvement Program” as part of the overall Valley Program. The program includes SJJPA’s overall Valley Rail vision for the implementation of the 8th and 9th Daily round-trips, and running seven round-trips between Sacramento and Merced within the next 10 years, while also increasing service to the Bay Area and providing critical connectivity to the HSR EOS. The details of the Valley Rail program is included in Chapter 5.

SJJPA is currently implementing its Short-Term Capital Improvement Program (0-5 years), which has a five-year horizon. This program focuses on the improvements needed for the 8th and 9th Daily round-trips, several other station projects, and corridor and other projects to improve the San Joaquins Service. In January 2018, SJJPA submitted a Transit and Intercity Capital Program (TIRCP) Valley Rail grant application (jointly with the SJRRC) to fund a program of capital improvements associated with the implementation of the 8th and 9th Daily round-trips. On April 26, 2018, CalSTA announced that the SJJPA/SJRRC Valley Rail Application was awarded \$500.5 million to expand San Joaquins and ACE services. As part of this service, the Sacramento Subdivision will be upgraded between Sacramento and Stockton to allow for passenger rail service with up to six new stations along the corridor. Additionally, a new layover facility will be constructed in Natomas (in Sacramento) and the Stockton Regional Maintenance Facility will be expanded to accommodate San Joaquins trainsets. Two additional trainsets are expected to be procured by the state for the expanded service. Other projects include additional parking, a new station in Oakley, and a relocated Madera Station. In 2020, in partnership with SJJPA, SJRRC and Caltrans pursued and secured \$120 million in additional state and federal funding to complete the Stockton Diamond Grade Separation Project. On January 31, 2023, CalSTA announced that the Valley Rail Program had been awarded an additional \$142 million to fill funding gaps created by supply chain and inflationary pressures to complete construction while protecting and leveraging significant federal and local investments. Many projects within the Valley Rail Program are facing schedule delays and funding shortfalls. SJJPA is implementing various mitigation measures and strategies to minimize the delays and pursue additional funding to fully deliver the Valley Rail Program.

SJJPA also has a Longer-Term Capital Improvement Program (5-10 years), which envisions improvements to achieve seven round-trips between Sacramento and Merced, with the Merced Intermodal Track Connector (MITC) Project allowing San Joaquins trains to share a station and platform-to-platform transfer with High-Speed Rail. Expanded service will require additional capacity enhancement projects such as double-tracking, improvements at the Robert J. Cabral Station in downtown Stockton, the grade separation of the Stockton Diamond, a new maintenance facility, additional track work and/or capital access fees, and additional rolling stock.

Beyond the 10-year horizon, extensions planned for the San Joaquins include rail service north of Sacramento along the UPRR rail line from Sacramento to Chico with stations at Plumas Lake, Marysville/Yuba City, Gridley (with a thruway connection to Oroville) and Chico in the mid-term horizon, and utilization of the Altamont Corridor to bring intercity service to additional Bay Area markets is also being planned that would terminate at a new Union City/BART station. SJJPA may also study the extension of service past the Amtrak Oakland Station to serve the Amtrak Coliseum/Airport Station, and working with Caltrans, CCJPA and the City of Sacramento to study a direct connection for Valley Rail service to Sacramento Valley Station (SVS).

Fare Policy

SJJPA will work to develop fares that ensure the service is attractive and competitive with other modes of transportation along the corridor. The San Joaquins have a single, “one-bucket” fare grid with a peak fare plan for high traffic periods. The fare grid utilizes a distance-based methodology with a descending per mile rate as the length of the trip increases.

Due to reduced available seating capacity from multiple equipment overhaul and retrofit programs, SJJPA has reinstated reserved ticketing to reduce the likelihood of standees onboard the trains and Thruway Buses. Reinstating reserved ticketing alerts ticket purchasers of “at-capacity” trains and Thruway Buses encouraging passengers to purchase tickets for a less impacted train or another date.

In FY25/26, SJJPA will be considering a fare increase for the San Joaquins to increase revenue generation as costs per passenger continue to increase. SJJPA will also launch a Business Class Study with the aim of providing a new product to the market that will increase revenue.

Service Amenities and Food Service

SJJPA is prioritizing the evolution of its food and beverage program to enhance passenger experience while managing costs and operational efficiency. The transition to a full complimentary snack service aims to provide equitable offerings across all trains, replacing traditional Café Car services with more cost-effective solutions. Initially, complimentary snack boxes were introduced on select trains, but passenger feedback led to the development of ‘Snack Stations’ in Venture Cars, offering a grab-and-go selection that reduces waste while maintaining affordability. SJJPA is collaborating with a third-party provisioner to streamline snack distribution and explore vending machine solutions for Venture Car trains, ensuring sustainable and consistent service. Beyond food service, passengers continue to enjoy key amenities such as complimentary Wi-Fi with an expanding entertainment portal, bicycle storage, and versatile seating with power outlets. Future enhancements include integrating vending machine technology, reinstating onboard attended sales, and potentially introducing Business Class, with \$2.34 million requested to support these initiatives.

Marketing Strategies

With a \$1.75 million annual budget request, SJJPA is set to implement a robust, integrated marketing and communications plan to drive ridership growth and retention across the San Joaquins’ extensive train and Thruway Bus network. Spanning California and into Nevada, the service connects 18 stations and nine bus routes to over 100 destinations, requiring a strategic, multi-channel approach to effectively reach and engage riders. The marketing plan includes targeted advertising campaigns across digital and traditional media, comprehensive brand management, public relations efforts, and grassroots community outreach. Investments in owned communication channels—such as social media, email, and the website—will enable deeper engagement, especially as SJJPA works toward gaining greater access to rider data with a new ticketing system. Outreach programs will expand partnerships with universities, businesses, and key stakeholders, with a strong emphasis on engaging Hispanic communities, which make up 46% of ridership. Additionally, rider appreciation initiatives, influencer collaborations, and event-based engagement will foster loyalty and increase awareness of the service. As the San Joaquins prepares for service expansions, new station launches, and major infrastructure projects like Valley Rail and zero-emission locomotives, this funding will ensure the execution of a dynamic, data-driven marketing strategy that strengthens connections with passengers and maximizes the service’s visibility.

Annual Funding Requirement

A primary purpose of this Business Plan is to request the annual funds required by SJJPA to operate, administer, and market the San Joaquins for agreed-upon service levels. Table ES.1 summarizes the funding request by the SJJPA.

Table ES.1/10.5

SJJPA State Funding Request for the San Joaquins (FY 2024/25 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
Operating			
-Amtrak Contract	\$48,399,538	\$54,964,851	\$56,613,797
-Direct Operations and Mechanical	\$27,795,125	\$43,361,200	\$44,774,460
Administrative	\$6,225,542	\$6,740,047	\$6,874,843
Marketing	\$1,750,000	\$1,750,000	\$1,750,000
Minor Capital Program	\$500,000	\$500,000	\$500,000
SJJPA Service and Program Initiatives	\$5,815,000	\$3,525,000	\$6,025,000
Total Request	\$90,485,205	\$109,141,098	\$114,838,100

Safety and Security

The primary objectives of SJJPA's Safety and Security Program include continuing a broad-based program of educational activities, increasing public awareness of rail safety and security along the San Joaquins corridor, and aggressively pursuing capital improvements that help improve the safety of the infrastructure.

SJJPA will leverage a network of rail safety education resources through California Operation Lifesaver, materials and resources provided by the Transportation Security Administration (TSA), and safety and security grant programs. SJJPA will also continue collaborative efforts with the State, SJJPA member agencies, Amtrak, UPRR, BNSF, California Operation Lifesaver, Transportation Security Administration (TSA), local law enforcement and first responders along the San Joaquins Corridor to address safety and security issues impacting the service.

In an effort to identify needed physical improvements, SJJPA will continue to conduct a systematic evaluation of the conditions along the railroad right-of-way and in and around San Joaquins stations (including parking lots and platforms assessment of the conditions along the railroad right-of-way and in and around San Joaquin as well as onboard trains. California's Office of Emergency Services has provided much of the funding for SJJPA's program of Safety and Security capital improvements. Important capital projects that SJJPA is currently implementing or pursuing include:

- Fencing projects at locations identified based on incident hot spots and high numbers of near misses;
- Increased lighting at stations and parking lots, as well as installing blue light phone towers (originally developed for use on college campuses); and
- Improved safety and security-related signage, including messaging around suicide prevention, railroad safety, and human trafficking awareness.

Station Area Development and Connectivity

Increased development near San Joaquins stations promotes increased use of the San Joaquins, generating additional ridership and revenue to benefit the State. The responsibility and powers needed to focus growth and

produce station area development reside primarily with local government. To help ensure that the San Joaquins become an instrument for encouraging implementation of station area development principles, SJJPA will:

- Encourage local governments to prepare/update and adopt station area plans, amend city and county general plans, and promote transit-oriented development (TOD) in the vicinity of San Joaquins stations.
- Assist local governments and developers in securing grants/funding for planning and implementing TOD around San Joaquins stations.
- Require new San Joaquins stations be developed as multi-modal transportation hubs.
- Encourage the location of new San Joaquins stations in traditional city centers and/or areas with high potential for TOD around the station area.
- Work with communities and organizations to support TOD and with developers to implement TOD.
- Encourage planning consistent with SB 375 (Sustainable Communities Strategy), transit priority areas, infill development and TOD.
- Prepare station areas for potential changes in first- and last-mile access including the growth of micro-mobility, and shared, connected, electric, and automated vehicles.

SJJPA is monitoring existing transit services and encouraging local and regional transit agencies to improve and expand transit services that connect to San Joaquins stations. SJJPA is also encouraging transit agencies to promote their connection to the San Joaquins onboard their transit services and at their stops/stations. SJJPA is working to improve the coordination of fares and service schedules with connecting transit services and will seek funding opportunities to Implement transit-transfer programs for San Joaquins passengers.

In partnership with local/regional agencies, SJJPA will continue to pursue Caltrans Sustainable Planning grant(s) in 2025 and 2026 to study increased connectivity at San Joaquins stations focusing on improving service to underserved disadvantaged/priority populations. To this end, SJJPA partnered on three of these grant applications in early 2024, one of which will have SJJPA take the lead on a valley-wide planning effort in conjunction with a new San Joaquin Valley Regional Policy Council-member working group. This planning working group and the planning effort managed through the grant will focus on passenger rail, transit, and TOD opportunities in the valley, and include studying creative ways to improve service connectivity to disadvantage/priority populations throughout the San Joaquins Corridor and to HSR.

1. INTRODUCTION

The purpose of this 2025 San Joaquin Joint Powers Authority Business Plan Update (“Business Plan”) is to identify the San Joaquin Joint Powers Authority’s (SJJPA) intentions for State Fiscal Year (FY) 2025/26 and FY 2026/27 in its management of the San Joaquins Intercity Passenger Rail Service (San Joaquins), and to request the annual funds required by SJJPA to operate, administer, and market the San Joaquins. The State of California requires that an Annual Business Plan Update be submitted to the Secretary of the California State Transportation Agency (CalSTA) in draft form by April 1 of each year, and final form by June 30 of each year to allow Amtrak time to finalize operating cost estimates. This Business Plan will be reviewed and approved by the State and used to develop an annual appropriation request to the State Legislature.

Business Plan Requirements

This Business Plan Update includes State-required information, including the following:

- Service performance;
- Operating and action plan strategies;
- Short-term and long-term capital improvements;
- Funding requirements for the upcoming fiscal year;
- External factors affecting the service;
- Plans for service expansion and enhancement efforts;
- Marketing and outreach efforts;
- Establishment of fares; and
- Delineation of how proposals to expand or modify service, including funding and accounting, are separate from locally-sponsored services in the corridor.

This Business Plan must also be consistent with the 2024 California State Rail Plan and the California High-Speed Rail Authority (CHSRA) Draft 2024 Business Plan.

Regional Governance of the San Joaquins

In 2012, transportation planning agencies throughout the San Joaquin Valley worked together in order to set up a regional Joint Powers Authority and to support legislation that would enable regional governance of the San Joaquins. To protect the existing service and to promote its improvement, local and regional agencies throughout most of the San Joaquins Corridor sponsored and supported Assembly Bill 1779 (AB 1779). This bill enabled regional government agencies to form the San Joaquin Joint Powers Authority to take over the administration and management of the San Joaquins from the State. AB 1779 was passed by the Legislature on August 30, 2012 with bi-partisan support, and was signed by Governor Brown on September 29, 2012. The first SJJPA Board Meeting was held on March 22, 2013 in Merced.

The SJJPA Governing Board includes elected representatives of ten Member Agencies, which include Alameda County, Contra Costa 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, and Tulare County Association of Governments.

AB 1779 defines the composition of SJJPA, as well as requiring that the interagency transfer must result in administrative or operating cost reductions. AB 1779 also requires SJJPA to protect the existing service and facilities and seek to expand service as warranted by ridership and available revenue.

Roles and Responsibilities

On July 1, 2015, SJJPA became the primary managing entity of the San Joaquins. The SJJPA is responsible for the following:

- Oversight and management of the day-to-day San Joaquins operations, which includes entering into an operating agreement with the current contract operator, the National Railroad Passenger Corporation (Amtrak);
- Negotiating changes to the current contract or selecting another qualified operator;
- Advising the Capitol Corridor Joint Powers Authority (CCJPA) on the management and administration of the State-owned and other rolling stock (passenger cars and locomotives) assigned to the San Joaquins;
- Overseeing the dedicated feeder bus system for the San Joaquins, which is subcontracted to private bus operators through the Amtrak contract;
- Planning for future service improvements;
- Coordinating with CCJPA and Los Angeles-San Diego-San Luis Obispo (LOSSAN) JPA and the State on issues such as scheduling, connecting buses, and ticketing; and
- Marketing for the San Joaquins.

The State and Amtrak share operating responsibility for the San Joaquins with SJJPA. Under the provisions of AB 1779, the State continues to provide the funding necessary for service operations, administration, and marketing. Furthermore, Caltrans Division of Rail is responsible for the development of the California State Rail Plan; coordination and integration between the three state-supported intercity passenger rail services; the preparation of grant applications to the federal government; and the development of state budget requests. The State also remains the owner of the trainsets used for the San Joaquins and Capitol Corridor Services and continues to be responsible for the procurement of new equipment for the state-supported intercity passenger rail services. Amtrak continues to serve as the operator of the San Joaquins though SJJPA is taking a larger role in fleet maintenance as discussed in Chapter 3 of this business plan.

The San Joaquin Regional Rail Commission (SJRRC), the managing body for the ACE commuter rail service between Stockton and San Jose, was selected by the SJJPA Board to be the Managing Agency at the July 26, 2013 SJJPA Board Meeting in Fresno for an initial 3-year term (September 27, 2013 – September 27, 2016) and was later extended for an additional 3-year term (September 27, 2016 – September 27, 2019). At the November 22, 2019 SJJPA Board Meeting, the SJJPA Board approved SJRRC as the Managing Agency for an additional 5-year term (September 27, 2019 – September 27, 2024). For continuity purposes and given the combined role of SJJPA and SJRRC in delivering the Valley Rail Program, and the use of SJRRC's contractor to perform maintenance and overhaul work on the State-owned intercity rail fleet, the SJJPA Board approved Amendment 3 to the agreement for a five (5) year extension at their May 17, 2024 Board meeting. Advocacy

In addition to more cost-effective administration and operations, there are many benefits to regional governance of the San Joaquins. Train riders and San Joaquin Valley residents now have a stronger voice in deciding what happens with the service, as local decision-making is more responsive and adaptive to passenger issues. SJJPA, which is made up of elected officials throughout the San Joaquins Corridor, is a strong voice in advocating for service improvements and expansions – particularly in Washington D.C. and in Sacramento. SJJPA is taking advantage of joint marketing and partnerships with local agencies throughout the San Joaquin Valley. Since SJJPA's Board Members are part of the communities in the San Joaquins Corridor, they are able to facilitate the engagement of local communities throughout the corridor to use and support the San Joaquins. Additionally, SJJPA will be increasing advocacy work at the State level and will bring additional resources to bear to champion the many capital, equipment, and service initiatives which are currently active.

Public Outreach for this Business Plan

Public outreach of the Draft 2025 SJJPA Business Plan will include briefings for key stakeholder groups, electronic outreach to the SJJPA stakeholder list, and posting a public review draft on sjjpa.com. This process is meant to engage with the public and stakeholders to provide information about this document and the opportunity for public comment.

Briefings were held during the development and will be held during the comment period of the Business Plan. These briefings provide an opportunity to engage key stakeholder groups within the corridor. Briefings will be held with the SJJPA Board, Central Valley Rail Working Group, CalSTA, Caltrans, Freight Railroads, San Joaquin Valley Rail Committee, and Amtrak. SJJPA will seek input from these and other agencies and organizations that have an interest in intercity passenger rail.

As a part of its Stakeholder Engagement Strategy, SJJPA has developed an extensive stakeholder email list that it employs to notice board meetings, service updates, and to engage stakeholders to participate in the Business Plan process. SJJPA will send electronic communications to its stakeholder list requesting public comment and provide links to the document. This process ensures those invested in intercity passenger rail are engaging with SJJPA in the San Joaquin Valley, Sacramento, and the Bay Area, and have an opportunity to provide comments to the Business Plan. Finally, SJJPA posted the Public Review Draft Business Plan to its website (sjjpa.com) on March 10, 2025, for public review of the document and was circulated to SJJPA's stakeholder list.

2025 SJJPA Business Plan Update Approval Process

This Business Plan is similar, and presented as an update to, the 2024 SJJPA Business Plan. The changes include providing current numbers for the San Joaquins operating expenses and bringing the plan up-to-date. The SJJPA Board discussed the general outline and highlighted changes planned for the 2025 Business Plan at its January 24, 2025, Board Meeting. Following the incorporation of comments from the public review period, an updated Draft Business Plan will be presented to the SJJPA Board at the March 19, 2025, Board Meeting for approval. Following approval, the Draft Business Plan will be submitted to CalSTA before April 1, 2025. A final version of the Business Plan, which includes revised operating cost estimates from Amtrak, will be presented at the May 2025, SJJPA Board Meeting. The Business Plan will be submitted to CalSTA by June 30, 2025.

2. HISTORICAL PERFORMANCE OF THE SERVICE AND ROUTE CHARACTERISTICS

Beginning with the introduction of the Amtrak national network in the early 1970s, passenger train service has been expanding in California. The State initiated, co-funded, and operated intercity rail service under the authority of Section 403(b) of the Federal Rail Passenger Services Act. Amtrak operates all three state-supported intercity rail services.

San Joaquins Intercity Rail Service (“San Joaquins”)

The San Joaquins extends 364 miles and provides direct rail service to 11 counties: Sacramento, Contra Costa, Alameda, San Joaquin, Stanislaus, Merced, Madera, Fresno, Kings, Tulare, and Kern. Between Oakland and Bakersfield, the San Joaquins route is 315 miles long and has 13 intermediate stops. The San Joaquins route is 49 miles between Sacramento and Stockton with one additional intermediate stop. The San Joaquins has seven daily round-trip trains (five between Oakland and Bakersfield and two between Sacramento and Bakersfield). The current minimum scheduled San Joaquins running time between Oakland and Bakersfield is 6 hours and 16 minutes. Between Sacramento and Bakersfield, the San Joaquins has a minimum 5 hours and 23 minutes running time. Maximum speed for the San Joaquins is 79 mph.

In 1979-80, the San Joaquins only operated two daily round-trips between Oakland and Bakersfield and annual ridership was a little over 123,000. Ridership steadily increased over the years, reaching a peak in FY 2013/14 when it recorded over 1.2 million passengers. Though ridership was impacted by the COVID-19 pandemic similar to other passenger rail services, the San Joaquins has been steadily recovering from the pandemic with positive ridership and revenue numbers year-over-year. The San Joaquins Service is the seventh most used intercity service within the Amtrak system. Table 2.1 presents historical annual operating performance of the San Joaquins between FY 1973/74 and FY 2023-24.



Table 2.1

San Joaquins Routes Annual Operating Performance - State Fiscal Years								
State Fiscal Year	Ridership Data		Financial Data for Operations					
	Ridership	PM/TM	Revenue	Expense	Loss	State	Amtrak	Farebo x Ratio
						Calculated	Service Costs	
		(F1)		(F2)		(F3)	(F4)	(F5)
1973-74 (S1)	38,770	83.6						
1974-75	66,990	44.2						
1975-76	66,530	43.8						
1976-77	87,642	56.0						
1977-78	80,611	52.7						
1978-79	87,645	60.2						
1979-80 (S2)	123,275	63.6	\$1,174,065	\$3,975,185	\$2,801,120	\$518,206		29.5%
1980-81	159,498	55.3	\$2,224,137	\$6,940,934	\$4,716,797	\$1,360,391		32.0%
1981-82	189,479	65.3	\$3,115,710	\$7,774,029	\$4,658,319	\$2,228,585		40.1%
1982-83	186,121	62.9	\$3,342,137	\$7,991,697	\$4,649,560	\$2,490,275		41.8%
1983-84	248,275	85.3	\$4,730,431	\$8,094,789	\$3,364,358	\$2,518,066		58.4%
1984-85	269,837	94.6	\$5,210,951	\$8,641,293	\$3,430,342	\$2,802,955		60.3%
1985-86	280,798	101.1	\$5,425,329	\$8,610,554	\$3,185,225	\$2,658,895		63.0%
1986-87	304,668	106.1	\$6,084,677	\$9,179,133	\$3,094,456	\$2,929,148		66.3%
1987-88	340,573	121.1	\$7,457,686	\$9,633,659	\$2,175,973	\$2,605,572		77.4%
1988-89	370,190	133.7	\$9,527,268	\$10,968,216	\$1,440,948	\$1,887,450		86.9%
1989-90 (S3)	418,768	116.9	\$11,84,743	\$15,286,520	\$3,440,777	\$3,544,332		77.5%
1990-91	463,906	104.1	\$12,691,986	\$18,456,785	\$5,764,799	\$5,803,565		68.8%
1991-92	483,593	104.3	\$12,369,805	\$18,633,777	\$6,263,972	\$6,472,598		66.4%
1992-93 (S4)	516,113	109.6	\$12,628,496	\$22,227,149	\$9,598,653	\$10,789,651		56.8%
1993-94	558,569	94.6	\$13,894,624	\$26,678,861	\$12,784,237	\$12,335,021	\$3,937,150	52.1%
1994-95	524,680	88.8	\$12,244,668	\$25,077,153	\$12,832,485	\$12,668,018	\$3,705,069	48.8%
1995-96	526,088	86.6	\$12,477,497	\$25,386,099	\$12,908,602	\$14,483,048	\$1,360,327	49.2%
1996-97	652,544	106.1	\$13,817,681	\$34,528,165	\$20,710,484	\$16,265,387	\$5,672,236	40.0%
1997-98	702,178	118.0	\$15,230,966	\$36,517,290	\$21,286,324	\$17,190,515	\$4,493,597	41.7%
1998-99 (S5)	680,687	102.8	\$16,496,457	\$37,269,835	\$20,773,378	\$19,938,254	\$1,712,168	44.3%
1999-00	671,295	92.7	\$18,061,512	\$41,791,782	\$23,730,270	\$24,232,326	\$652,236	43.2%
2000-01	710,833	97.9	\$19,667,681	\$43,404,325	\$23,736,644	\$24,350,127	\$540,809	45.3%
2001-02 (S6)	733,152	96.9	\$20,114,693	\$46,503,548	\$26,388,855	\$26,281,035	\$396,392	43.3%
2002-03	769,708	89.9	\$20,318,564	\$50,552,529	\$30,233,965	\$29,729,650	\$504,315	40.2%
2003-04	752,227	87.2	\$22,100,796	\$50,061,460	\$27,960,664	\$27,960,664	\$89,345	44.1%
2004-05	743,245	85.1	\$22,590,880	\$49,883,689	\$27,292,809	\$27,292,809	-	45.3%
2005-06	801,242	91.1	\$25,869,979	\$55,226,742	\$29,356,763	\$29,356,763	-	46.8%
2006-07	789,641	88.8	\$26,862,994	\$61,188,078	\$34,325,084	\$34,325,084	-	43.9%
2007-08	894,346	88.2	\$28,945,651	\$65,474,253	\$36,528,602	\$36,528,602	-	44.2%
2008-09	958,946	90.0	\$30,671,510	\$68,232,766	\$37,561,256	\$37,561,256	-	45.0%
2009-10	967,437	103.7	\$32,117,615	\$62,689,957	\$30,572,342	\$30,572,342	-	51.2%
2010-11	1,032,579	112.9	\$36,571,173	\$69,578,077	\$33,006,904	\$33,006,904	-	52.6%
2011-12	1,133,654	124.0	\$40,161,170	\$74,360,735	\$34,199,565	\$34,199,565	-	55.0%
2012-13	1,195,898	127.5	\$41,415,960	\$73,685,365	\$32,269,405	\$32,269,405	-	56.2%
2013-14	1,202,624	125.8	\$41,421,102	\$79,263,729	\$37,842,627	\$37,842,627	-	52.3%
2014-15	1,181,639	123.8	\$41,020,415	\$80,023,410	\$39,002,995	\$39,002,995	-	51.3%
2015-16 (S7)	1,135,424	118.6	\$39,040,339	\$77,388,218	\$38,347,879	\$38,347,879	-	50.4%
2016-17	1,125,626	100.1	\$38,880,344	\$78,939,791	\$40,059,447	\$40,059,447	-	49.3%
2017-18	1,090,200	97.4	\$36,073,870	\$83,878,638	\$47,804,768	\$47,804,768	-	43.0%
2018-19	1,076,454	93.9	\$35,217,711	\$85,840,487	\$50,622,776	\$50,622,776	-	41.0%
2019-20	794,634	77.4	\$27,174,389	\$81,462,210	\$53,945,006	\$53,945,006	-	33.4%
2020-21	392,538	56.7	\$12,801,388	\$59,002,225	\$43,141,698	\$43,141,698	-	21.7%
2021-22	656,469	74.4	\$23,774,562	\$73,870,832	\$50,096,271	\$50,096,271	-	32.2%
2022-23	828,352	91.8	\$29,228,490	\$87,942,828	\$58,654,338	\$58,654,338	-	33.2%
2023-24	902,292	96.2	\$31,008,066	\$92,968,756	\$61,960,690	\$61,690,960	-	33.3%

Table 2.1 Notes

(S1) Service started 3/6/74 with one round-trip between Oakland and Bakersfield Data is for four months only.

(S2) State support started 10/1/79. Data is for nine months, during which time ridership totaled 93,206.

(S3) Third round-trip added 12/17/89 between Oakland and Bakersfield.

(S4) Fourth round-trip added 10/25/92 between Oakland and Bakersfield.

(S5) Fifth round-trip added 2/21/99 between Sacramento and Bakersfield.

(S6) Sixth round-trip added 3/18/02 between Sacramento and Bakersfield.

(S7) Seventh round-trip added 6/20/16 between Oakland and Bakersfield.

(F1) Passenger-miles per train mile (PM/TM), a measure of the average load on a train over its entire route.

(F2) Prior to October 1983, all trains billed on solely related cost basis. From October 1983 through September 1995, all trains billed on short term avoidable cost basis. Effective October 1996, all trains billed on Full Cost (Train, Route and System) Basis. Includes cost of connecting buses. Depreciation and interest (equipment capital cost) included in operating cost under solely-related cost basis but excluded and charged separately under short-term, long-term avoidable and full cost bases.

(F3) Calculated service costs shown here may not reflect actual State contract cost. From October 1979 through September 1983, State cost increased in stages from 18.5 to 48.5 percent of operating loss (including equipment costs). Between October 1983 and September 1995, State cost was 65 percent of train operating loss for first three round trips, plus 50 percent of depreciation and interest (equipment capital cost). For the fourth round trip, State cost was 70 percent of train operating loss plus equipment capital cost. Between October 1995 and September 1996, State cost was 100 percent of train operating loss and 60 percent of equipment capital cost. Between October 1996 and September 1997, State cost was 65 percent of train operating loss. Effective October 1997, State is billed contractually specified percentages of most individual cost elements, plus a fixed amount for certain other cost elements. Also includes State payment of costs of special agreements with Amtrak or other third party contractors for operating expenses, and State payment of entire net cost of all connecting bus routes.

(F4) Between State Fiscal Years 1993-94 and 2003-04, Amtrak cost is based on billings submitted and reflects cost basis and Amtrak shares as stated in notes (F2) and (F3) above. However, Amtrak does not include the unbilled Amtrak share of fixed cost elements. Prior to FY 1993-94, data to calculate Amtrak cost is not available/ beginning in FY 2004-05, no Amtrak share is billed.

(F5) Farebox Ratio – The ratio of Operating Revenue to Operating Expense.

Amtrak operates the state-supported San Joaquins on track owned by the UPRR and the BNSF through operating agreements with the UPRR and BNSF. UPRR owns the 49 miles of track used by the San Joaquins between Stockton and Sacramento, and 39 miles between Oakland and Port Chicago, whereas the remaining 276 miles (between Port Chicago and Bakersfield) are owned by BNSF (see Table 2.2). UPRR's track is a mix of single and two main tracks – between Oakland and Port Chicago, the service operates over 33.5 miles of double-track and 6 miles of single track, while between Sacramento and Stockton, operation is over 33 miles of single track and 16 miles of double-track in 5 sections. The BNSF line has approximately 65.7 miles of double-track divided among five segments.

Table 2.2

San Joaquins Route Ownership and Track Characteristics								
Between	Mile Post	And	Mile Post	Route Miles	Owner of Track	*No. of Tracks	Max Speed	Signal System
Oakland Jack London Square	7.0	Oakland 10th St.	4.2	2.8	UP	2	50	CTC
Oakland 10th St.	2.2	Martinez	31.7	29.5	UP	2	79	CTC
Martinez	34.7	Port Chicago	41.3	6.6	UP	1	79	CTC
Port Chicago	1163.5	Stockton	1120.7	42.8	BNSF	1-2	79	CTC
Sacramento	89.0	Elvas	91.8	2.8	UP	2	35	CTC
Elvas	38.8	Stockton	84.7	45.9	UP	1	60	CTC
Stockton	1120.7	Bakersfield	886.9	233.8	BNSF	1-2	79	CTC
			TOTAL	364.2				

Source: California Department of Transportation
Notes: *General Number of Mainline Tracks
Owners:
BNSF - BNSF Railway Company
UP - Union Pacific Railroad Company
Signal Systems: CTC - Centralized Traffic Control - Wayside signals protect possession of blocks. Signals and powered switches are also remotely controlled from the dispatching center to direct the movement of trains.

Assessing the ridership patterns of the San Joaquins is critical to monitoring performance and conducting effective service planning. Table 2.3 shows passenger ons/off (i.e. boardings/alightings) at San Joaquins train stations for Federal FY 2023. These numbers include trips with a Thruway bus connection (which comprise a considerable number of the trips at Bakersfield, Stockton [San Joaquin Street], Sacramento, Hanford, Martinez, and Emeryville Stations). Table 2.4 illustrates how ons/off can differ significantly from the true origins/destinations points of passengers by excluding ons/off of passengers making transfers between a bus and train. While ons/off are useful for planning station capacity and design issues, origins/destinations statistics are far more useful (and accurate) for service planning. For example, in Table 2.3, Bakersfield is shown as having the most (380,348) passenger ons/off in FY 2024. However, about 50% of these passengers took a connecting bus between Southern California, reducing the number of passengers who actually traveled to/from Bakersfield as an origin/destination point to 112,883 (see Table 2.4). Stockton (San Joaquin Street) Station is shown as having the third highest ridership with 259,245 passengers in Table 2.3, but about 64% of these passengers took a connecting Thruway bus, reducing the number of passengers who actually traveled to/from Stockton (San Joaquin Street) Station as an origin/destination point to 93,488 (see Table 2.4, see prior note on this table). Many of those taking a Thruway bus at Stockton (San Joaquin Street) Station were actually traveling to/from Sacramento (about 48,000 passengers). For Sacramento Station, the total number of passengers (rail + Thruway bus) actually traveling to/from Sacramento was nearly 80,655 passengers. The Thruway bus station with the greatest number of riders is by far Los Angeles Union Station with over 195,000 San Joaquins passengers in FY 2019.

Table 2.3

San Joaquins Train Station Ridership Report - FY 2023* (Includes Passengers Making Thruway Bus Transfers)		
	Station	Ons/Offs (FY 23)
1	Bakersfield	380,348
2	Fresno	283,290
3	Stockton (San Joaquin St.)	259,245
4	Merced	120,527
5	Hanford	119,084
6	Emeryville	93,506
7	Modesto	92,087
8	Martinez	77,749
9	Oakland	61,705
10	Richmond	39,961
11	Sacramento	30,488
12	Antioch	29,942
13	Turlock-Denair	27,455
14	Wasco	26,396
15	Madera	24,541
16	Corcoran	18,602
17	Stockton (Downtown)	4,176
18	Lodi	2,326

Source: Amtrak, 2024

*The Fiscal Year (FY) is based on Amtrak's fiscal year, which is October-September.

Table 2.4

San Joaquins Train Station Ridership Report - FY 2023* (Does Not Include Passengers Making Thruway Bus Transfers)		
	Station	Ons/Offs (FY 23)
1	Fresno	145,114
2	Bakersfield	112,883
3	Stockton (San Joaquin St.)	93,488
4	Hanford	65,117
5	Merced	58,661
6	Modesto	46,820
7	Oakland	45,145
8	Martinez	43,520
9	Emeryville	37,350
10	Richmond	29,455
11	Antioch	20,714
12	Sacramento	16,228
13	Turlock-Denair	12,745
14	Madera	12,165
15	Corcoran	11,139
16	Wasco	10,102
17	Stockton (Downtown)	1,820
18	Lodi	1,219

Source: Amtrak, 2024

*The Fiscal Year (FY) is based on Amtrak's fiscal year, which is October-September.

Table 2.5 provides Federal FY 2024 ridership for the top San Joaquins “city pairs” (including trips that start or end on an Amtrak San Joaquins Thruway Bus stop). This data includes the true origins/destinations of riders, providing an accurate picture of ridership markets. Tables 2.3, 2.4, and 2.5 highlight the importance of incorporating Thruway Bus travelers when discussing San Joaquins ridership.

Table 2.5

San Joaquins City Pair Ridership – FY 2024 (Includes Key Train Stations and Thruway Bus Stops)	
City Pair	Ridership
Fresno – Hanford	39,845
Bakersfield – Fresno	29,536
Fresno – Sacramento	28,370
Fresno – Los Angeles (Union Station)	27,896
Fresno – Merced	17,406
Oakland – Stockton (San Joaquin St.)	16,337
Emeryville – Fresno	15,846
Los Angeles (Union Station) – Merced	14,945
Fresno – Stockton (San Joaquin St.)	14,842
Fresno – Oakland	14,687
Bakersfield – Sacramento	14,604
Fresno – San Francisco	13,907
Fresno – Modesto	13,774
Fresno – Martinez	13,456
Los Angeles (Union Station) – Sacramento	13,144
Fresno – Richmond	10,220
Los Angeles (Union Station) – Wasco	10,198
Merced – Modesto	10,090
Richmond – Stockton (San Joaquin St.)	9,963
Bakersfield – Stockton (San Joaquin St.)	9,850
Source: Amtrak, 2024	

San Joaquins Amtrak Thruway Bus Service

The extensive network of dedicated Amtrak Thruway Buses connecting with the San Joaquins to and from destinations around California and Nevada is critical to the performance of the overall service. In addition to the Thruway Bus service connections in Bakersfield, other Amtrak Thruway Bus service connections are provided at Sacramento, Stockton, Lodi, Oakland, Emeryville, Martinez, Merced, Hanford, and Fresno. Approximately 55 percent of San Joaquins passengers used an Amtrak Thruway Bus on at least one end of their trip. San Joaquins ridership to/from key Amtrak Thruway Bus stops can be found in Table 2.6.

All trains either initiating or terminating at Bakersfield are met by Amtrak Thruway Buses connecting south to Southern California. In FY 2024, over 366,705 San Joaquins passengers used an Amtrak Thruway Bus between Bakersfield and Southern California or Las Vegas, with over 55% of these passengers traveling to or from Los Angeles Union Station (over 202,000 passengers).

Table 2.6

San Joaquins Ridership at Key Thruway Bus Stops – FY 2024		
	Bus Stop	Passenger Ons/Offs
1	Los Angeles (Union Station)	202,602
2	Sacramento	154,186
3	San Francisco	41,072
4	San Jose	28,602
5	Chico	19,441
6	Riverside	14,059
7	Santa Rosa	11,311
8	San Diego	10,237
9	San Bernadino	9,401
10	Burbank	7,370
11	UCLA/Westwood	7,126
12	Pasadena	6,508
13	Eureka	5,382
14	Yosemite Valley*	4,415
15	Arcata	4,264
16	Anaheim	1,902
*Aggregate of all Yosemite Valley bus stops Note: The above figures are total ons (boardings) and offs (alightings) at each bus stop. Source: Amtrak, 2024		

The Thruway Bus system extends north to Redding; east to Reno and Las Vegas, Nevada; south to Indio; and all along the California coast from Arcata to San Diego. SJJPA contracts with Amtrak for dedicated feeder bus services, and Amtrak then contracts with bus operators. The bus routes function as part of the San Joaquins, with coordinated connections, guaranteed seating, integrated fares and ticketing procedures, and inclusion in Amtrak's central information and reservation system in the same manner as the trains. In 2020, as a result of the pandemic, SJJPA took action to make some significant reductions to the San Joaquins Thruway Bus network in order to create a much more cost-effective service. In September 2021, SJJPA took additional action to maintain many of these measures for the foreseeable future. These changes included: truncating Route 19 at San Bernardino (it had previously served two split lines beyond San Bernardino that terminated in Indio and in Hemet); truncating Route 1c (deleting stops at Westchester, El Segundo and Torrance) and adding a terminus stop at Santa Monica; eliminating Route 1b (and adding more Route 1 service to Los Angeles Union Station); eliminating Route 12 (between Bakersfield and the Antelope Valley); eliminating Route 34 (between Stockton and San Francisco); eliminating the McKinleyville and Rio Dell Scotia stops along Route 7 and adding a new terminus stop at Cal Poly Humboldt State University; and working with Amtrak to have Routes 10 (which was merged with what was formerly Route 9), and 18 provided by private operators with revenue-sharing interline agreements with Amtrak (which eliminate most of the annual costs to the San Joaquins for these routes). FY 2024 ridership for these routes is shown on Table 2.7. The FY 2024 Thruway bus routes and their origins/destinations are as follows:

Route 1 – Los Angeles Basin/San Diego (from Bakersfield Station): Bakersfield-Los Angeles-San Diego;

Route 1C – West Los Angeles: Bakersfield – Van Nuys – Santa Monica

Route 3 – Chico (from Stockton/Sacramento Stations): Stockton-Sacramento-Chico;

Route 3A – Chico-Redding

Note: Route 3a buses are operated by RABA – Redding Area Bus Authority

Route 6 – South Bay (from Stockton Station): Stockton-San Jose;

Route 7 – North Bay/Redwood Empire (from Martinez Station): Martinez-Vallejo-Napa-Santa Rosa-Eureka-California Polytechnic State University, Humboldt (Arcata);

Route 10 – Santa Barbara & Las Vegas (from Bakersfield Station): Las Vegas – Bakersfield - Santa Barbara;

Note: Route 10 buses are operated by an interline agreement through Amtrak.

Route 15 – Yosemite National Park (from Merced/Fresno Stations):

Route 15 – Mammoth Lakes-Yosemite National Park (Summer Only)

Route 15A – Merced-Yosemite National Park;

Route 15B – Fresno-Yosemite National Park (Summer Only)

Note: Route 15 buses are operated by YARTS - Yosemite Area Regional Transportation System.

Route 18 – Central Coast/Visalia (from Hanford Station): Visalia – Hanford – San Luis Obispo – Santa Maria

Note: Route 18 buses are operated by an interline agreement through Amtrak.

Route 19 – Inland Empire (from Bakersfield Station): Bakersfield – Pasadena – San Bernardino

Route 20 – Reno/South Lake Tahoe (from Sacramento Station):

Route 20A – Sierra Foothills/High Sierra, Sacramento-Auburn/Reno/Sparks;

Route 20C – Lake Tahoe, Sacramento-South Lake Tahoe/Stateline;

Note: Route 20 buses are operated by El Dorado Transit

Route 35 – Santa Cruz (from San Jose Station): San Jose-Santa Cruz (buses operated by Santa Cruz Metropolitan Transit District).

Note: Route 6 connects passengers to Route 35 via Stockton to San Jose Station;

Route 40 – San Jose (from Merced): Merced-Los Banos-Gilroy-San Jose (expected to start fall 2025);

Route 56 –Stockton (from San Jose Station): San Jose - Stockton (Note: three one-way trips, Monday-Friday via the Altamont Corridor Express train);

Route 99 – San Francisco (from Emeryville Station): Emeryville-San Francisco.

Table 2.7

San Joaquins Thruway Bus Route Ridership - FY 2024		
Thruway Bus Route		Ridership
Route 1*	(Fresno - Bakersfield - Los Angeles – Santa Ana - San Diego)	259,236
Route 1C	(Bakersfield – Van Nuys – Santa Monica)	32,626
Route 3	(Stockton - Sacramento - Redding)	154,244
Route 6	(Stockton - San Jose)	28,549
Route 7	(Martinez - Napa - Santa Rosa - Eureka – Cal Poly Humboldt/Arcata)	42,329
Route 10	(Las Vegas - Bakersfield - Oxnard - Santa Barbara)	32,509
Route 15A/15B	(Merced - Mariposa - Yosemite Valley / Fresno - Yosemite Valley)	5,295
Route 18	(Visalia - Hanford - San Luis Obispo - Santa Maria)	12,407
Route 19	(Bakersfield - Riverside-San Bernardino)	42,614
Route 56	(San Jose - Stockton)	8,575
Route 99	(Emeryville - San Francisco)	39,735
	Total Ridership	625,493
Source: Amtrak, 2024 Notes: The above figures are total ons/off (boardings/alightings) for each bus route, and includes ridership for both directions. Additionally, for shared Thruway bus routes, riders transferring to/from the Capitol Corridor and Pacific Surfliner trains are included in the ridership figures. * Route 1 is made up of two sub-routes (1and 1C) which serve locations within the Los Angeles Basin and the Greater Southern California region.		

3. EXISTING TRAINSETS, NEW EQUIPMENT, AND MAINTENANCE

Caltrans, in partnership with the Federal Railroad Administration and States for Passenger Rail Coalition, is working to provide new rail equipment to not only meet increased demand from growth on existing services, but also for planned service expansions on the three State-supported services. With the Siemens Charger Locomotive order complete, Caltrans continues accepting delivery of Siemens Single-Level Venture Passenger Rail Cars for the San Joaquin Corridor in the Northern California Fleet.

The current San Joaquin fleet consists of a mix of locomotive types and train cars. The State of California owns or leases all locomotives and train cars utilized by the San Joaquin.

With the addition of the Siemens Venture Cars and with ridership recovery progressing on the San Joaquin, SJJPA intends to reintroduce the 7th daily round-trip, restoring service to pre-pandemic levels for the coming year. This service restoration is not considered the start of any new/expanded service, but reintroducing the service on a new optimized schedule including Thruway Bus connections to the Pacific Surfliner service and adjustments to improve scheduling for the Sacramento market will require delivery and deployment of new Venture Car trainsets. SJJPA will proceed to approve and implement a schedule change to move the San Joaquin Corridor onto the new, optimized schedule pattern for the 7th Round-Trip and activate the two trains needed to restore the 7th Round-Trip when equipment is available.

Existing Equipment

The San Joaquin and Capitol Corridor currently share a combined fleet of 14 F59 PHI Locomotives, 10 Charger Locomotives, and 78 bi-level passenger coaches and cab cars. The San Joaquin also utilizes 8 State-owned Comet Car coaches, as well as 30 Venture Cars and 2 F40 Cabbage cars (which the State leases from Amtrak). Comet cars are being phased out as Venture cars are deployed in revenue service. Venture cars are exclusively used on the San Joaquin corridor. The equipment identified above is referred to as the Northern California Fleet.

California Cars (Bi-Level Vehicles)

Historically, the San Joaquin primarily utilized bi-level California Cars. With the introduction of Venture cars, San Joaquin will primarily utilize single level vehicles in the future. The bi-level equipment was purchased by the State in the 1990's for use on the three California Intercity Passenger Rail Corridors. The Northern California bi-level fleet is shared between the San Joaquin and Capitol Corridor services to allow for maximum flexibility in seating capacity.

An essential feature of the bi-level coaches as well as the Venture cars is the ability for doors to be operated remotely on either side of the train from a single point of control. This feature allows the operator to maximize passenger flow in boarding and alighting operations and thereby minimizing station dwell time.

Comet Cars (Legacy Single-Level Vehicles)

The San Joaquin currently utilize one (1) Comet Car per trainset to meet BNSF's minimum axle count of 28 axles per train as required to mitigate the loss of shunt issues on the BNSF railroad, with one (1) Comet Car trainset available for use in an emergency. The Comet Cars are being removed from service as the new State-Owned Venture Car sets are introduced and put into revenue service. The removal of the Comet Cars from service in Northern California will allow the vehicles to be reallocated to Southern California for potential use on the LOSSAN Corridor.

Siemens Charger Locomotives

Caltrans procured 24 new Siemens Tier IV Charger diesel-electric locomotives, 10 of which were delivered for use in the Northern California Fleet. The 10 locomotives are shared between the San Joaquin and Capitol Corridor

trains. The Charger Locomotives meet EPA Tier IV emission standards and are capable of operating at 125 mph in revenue service. These locomotives replaced P42 locomotives which were being leased from Amtrak. The remaining 14 Charger Locomotives are in revenue service on the LOSSAN Corridor in Southern California.

EMD F59PHI Diesel Locomotives

Caltrans owns 15 EMD F59PHI Diesel locomotives shared between CCJPA and SJJPA corridors. These locomotives are critical to the operation as they are the only locomotives capable of operating the San Joaquins corridor in high temperatures during summer months. The current state of the F59 fleet is very concerning as they are far beyond their prescribed overhauls causing major in-service failures and very high repair expenses due to the catastrophic nature of failures experienced in recent years.

New Equipment

Siemens Single-Level Passenger (Venture) Rail Cars

Caltrans in agreement with Sumitomo Corporation of Americas (SCOA) will provide 49 single-level rail cars for use on the San Joaquins Corridor in Northern California. Siemens Mobility, Inc. (Siemens) is the car builder of this contract. Delivery of these new cars began in March 2020 with the balance of the cars scheduled to be delivered in 2026. The structure and design of these new rail cars is based on the passenger cars being used on the Brightline Service, which runs between West Palm Beach and Miami in Florida. San Joaquins Venture Cars trainsets consist of 6 cars each.

The first Venture Car train set went into revenue service in December 2023, with the 4th set anticipated to enter revenue service in mid-2025. The final Venture Cars will be delivered in early 2026, enabling all seven (7) trainsets to be available for revenue service in mid-2026.

Stadler Rail - H2 Flirt (Zero Emission Multiple-Unit (ZEMU))

Caltrans entered into an agreement with Stadler Rail USA to procure Ten 4-car H2 Flirt trainsets to be utilized initially on the San Joaquins and then introduced onto various Passenger Rail Corridors in the State. These trainsets will be powered by hydrogen fuel-cell technology, which allows for zero emission operation. The H2 Flirt's are scheduled to be completed and ready for testing in late 2027 and anticipated to be ready for revenue service in 2029. SJJPA staff is providing technical support to Caltrans during the development of the vehicle design, testing, commission and acceptance of the Vehicles.

Accessibility of Equipment

While the mix of fleet deployed on the San Joaquins requires unique approaches to each trainset type, no person shall be denied access on the basis of physical ability. Accessibility features for bi-level coaches include onboard wheelchair lifts, two designated spaces per train car for passengers in wheelchairs, and one wheelchair-accessible lavatory on the lower level of each passenger coach.

Prior to the Covid-19 Pandemic, the State had deployed Comet Car trainsets on the San Joaquins. Since the Comet Car trainsets have high-floors and do not have onboard wheelchair lifts, hand-cranked mobile wheelchair lifts are currently utilized to provide accessibility at all San Joaquins stations. Each single-level Comet Car coach has one wheelchair-accessible lavatory. Currently, the Comet Cars are deployed into service on the lowest ridership trains and will be phased out as Venture cars are deployed into revenue service. As with the Comet cars, the new single-level Siemens passenger rail cars have high-floors and currently utilize the hand-cranked mobile wheelchair lifts. However, SJJPA is currently working with the State and its consultants to explore more efficient ways to provide accessibility than the hand-cranked mobile wheelchair lifts. SJJPA and Caltrans are working together to construct temporary mini-high platforms at the existing stations to allow for level boarding on Venture Cars. Caltrans is working on the design of the portable bridge plate that will be stored on the cars. In

addition, Siemens is working on the car-borne lift to test on one of the Venture Cars, with both solutions accommodating level-boarding. Further planning will need to be undertaken to ensure that single-level rail cars are integrated effectively into the Northern California Fleet.

Passenger Information Displays and Wi-Fi

Currently, each passenger coach is equipped with electronic passenger information displays (PIDS) that provide the train number and destination, plus other public information. To ensure fast, reliable Wi-Fi service, the CCJPA is leading, and is responsible for, upgrading the system on the Northern California fleet, with all vehicles being upgraded, including Venture Cars.

Renewable Diesel Implementation

In coordination with Caltrans and CCJPA, SJJPA is helping meet California's Greenhouse Gas (GHG) emission reduction goals with renewable diesel being used exclusively in all the locomotives of the Northern California Fleet since May 2023.

SJJPA is also committed to utilizing renewable diesel in the bus fleets used to run the extensive San Joaquins Thruway Bus system. SJJPA has directed Amtrak to require use of renewable diesel in all future contracts with bus operators and renewable diesel has already been deployed on all routes.

Maintenance and Renovation

Caltrans, SJJPA, CCJPA, and Amtrak have been working on transitioning maintenance of the State-owned Northern California Passenger Rail Equipment fleet to SJJPA, with numerous agreements required to facilitate the transition over the last two years. Staff is also negotiating agreements with Union Pacific Railroad (UPRR) and Caltrain to allow for turnaround services to continue at the outlying locations for both the San Joaquins and Capitol Corridor services. The transition is scheduled to be completed prior to July 1, 2025.

The transition of maintenance responsibilities of the State-Owned Northern California Passenger Rail Fleet, consisting of 86 passenger rail cars, 24 locomotives, and 2 Non-Powered Control Units (NPCUs), allows Caltrans, SJJPA and CCJPA to implement a more proactive maintenance program for the State-owned passenger rail fleet in Northern California. This initiative covers both passenger cars and locomotives, aiming to enhance progressive maintenance, cleaning standards, equipment reliability and effective asset utilization, and uses the same model as the Venture Cars with the Authority assuming oversight. The San Joaquin Regional Rail Commission, as SJJPA's Managing Agency, will provide the oversight to complete work on behalf of Caltrans, utilizing staff and existing third-party agreements as necessary under the previously approved Rail Maintenance Services Agreement. Much of the maintenance work and cleaning will be completed at the Oakland Maintenance Facility (OMF) with the equipment being rotated to the Stockton RMF only as needed.

With the introduction of the State-Owned Venture Cars, Caltrans entered into an agreement with SJJPA to perform all maintenance activities of these vehicles on behalf of the State. This includes conditional acceptance activities at the SJRRC Rail Maintenance Facility (Stockton RMF), and as the Venture Cars enter into revenue service. The daily inspections, cleaning, and maintenance of the vehicles will be completed in Oakland, Bakersfield, and Sacramento, while all federally required inspections and heavy maintenance will be completed at the Stockton RMF. SJJPA will continue their management and oversight of Amtrak for the train operation portion of the Service.

Additionally, in 2023, Caltrans entered into an agreement with SJJPA on a Truck Overhaul Program for the 88 State owned Bi-level Passenger Rail vehicles, with work being done at the Stockton RMF. This program will overhaul the trucks, diaphragms, and coupler systems of the State-Owned vehicles.

Caltrans, Amtrak, SJJPA, and CCJPA have created a program for identifying overhaul projects to the existing fleet that will result in improved performance and reliability. For example, a midlife overhaul project on the existing State-owned fleet of F59 Locomotives is anticipated to be advertised in the Summer 2025.

Caltrans recent procurement of ZEMUs for operation on the Valley Rail Project, between Stockton and Natomas and ultimately between Merced and Natomas, requires further modification to the Stockton RMF to accommodate the hydrogen technology of the vehicles. In particular, ZEMUs often require overhead maintenance work due to vehicle designs accommodating hydrogen technologies, in contrast to work currently performed underneath existing equipment at the Stockton RMF. The engineering and development of facility modifications to the Stockton RMF is contingent on funding and direction from the State of California.

4. OPERATING PLAN AND STRATEGIES

SJJPA is in the process of a significant optimization and expansion effort of the San Joaquins Service. SJJPA is pursuing a significant increase in the frequency of the San Joaquins between Sacramento and the San Joaquin Valley. This aggressive program (the details of the Valley Rail Program is mentioned in Chapter 5) is needed to serve existing market demand (to capture a larger share of the business and leisure travel market to/from Sacramento) and to enable the San Joaquins to provide better connectivity to the HSR infrastructure under construction in the San Joaquin Valley. The most immediate priority for the expansion of service is the implementation of the 8th and 9th Daily round-trips. Details about capital improvements associated with the 8th and 9th Daily round-trips can be found in Chapter 5, along with information on the joint SJJPA/San Joaquin Regional Rail Commission (SJRRRC) 2018 Transit and Intercity Rail Capital Program (TIRCP) Valley Rail grant application, which was successful in funding this expansion of service.

SJJPA introduced a new schedule in Spring 2019 which returned the San Joaquins to full-corridor service for 7 daily round-trips and initiated a “slotted” schedule and distributed pad-time for improved on-time performance. In terms of optimizing operations, the slotted schedule SJJPA developed for Spring 2019 is based on a bi-hourly pulse system, providing statewide connectivity and consistent service frequency throughout the day. The pulse approach not only allows for improved service but is also more effective operationally and makes better use of infrastructure investments. The schedule results in a fixed interval between trains, and symmetrical northbound and southbound operations that reduce the number of locations needed for passenger-on-passenger train meets. BNSF simulations show high on-time performance with this schedule.

Due to the COVID-19 pandemic, San Joaquins service was reduced from 7 daily round-trips to 4 daily round-trips. As of October 22, 2021, the San Joaquins has been operating 6 daily round-trips. The 7th daily round-trip is anticipated to be reintroduced in 2025. The reintroduction of the 7th round-trip is a restoration of pre-pandemic service levels and not considered start of new/expanded service – the restored 7th round-trip will adjust the bi-hourly pulse to optimize Thruway Bus (Route 1) connections to the Pacific Surfliner service based on the spring 2025 service change implemented by LOSSAN, improve the scheduling of Sacramento trains, and seek to minimize chronic freight conflicts impacting the morning southbound departure from Sacramento. SJJPA's previous plans for increased service speeds and reductions in operating time remain on hold while the service builds back ridership and revenue. SJJPA will continue to advance efforts to improve on-time performance once the 7th round-trip service is restored. Full implementation of the 7th Round-Trip will require delivery and deployment of new Venture Car trainsets as described in the equipment sections of the Annual Business Plan.

To enhance the current service of the San Joaquins, SJJPA is committed to working with CalSTA, Caltrans, CCJPA, LOSSAN, San Joaquin Regional Rail Commission, Amtrak, BNSF, UPRR, and regional and local transit providers to improve connections to local/regional transit service to trains and connecting bus service along the San Joaquins Corridor. To help achieve this, SJJPA will coordinate through the San Joaquin Valley Regional Policy Council Rail & Transit Working Group to initiate the San Joaquin Valley Network Integration Study and TOD Action Plan (funded through a Sustainable Transportation Planning grant awarded by Caltrans in 2024), which aims to assist in coordinating improved communications and connectivity. SJJPA will also work to optimize the San Joaquins Thruway Bus services by implementing the provisions of SB 742 (Allen), adjusting routes to promote higher ridership and be more cost-effective, and pursuing partnerships with public and private bus operators to reduce operating expenses and increase ticket revenue – SJJPA has scoped and will complete a Thruway Network Optimization Study in 2025, which will be coordinated with Caltrans Division of Rail staff to ensure alignment with statewide intercity bus network planning.

The CHSRA's 2024 Business Plan anticipates HSR operations beginning on the Merced-Bakersfield HSR EOS by 2030 - 2033. SJJPA is working with CHSRA, CalSTA, Caltrans, and SJRRRC to ensure that improvements and service expansions for the San Joaquins and ACE services integrate with initial HSR service in the San Joaquin Valley, as well as HSR service extensions beyond the San Joaquin Valley. SJJPA is also working in partnership with CHSRA and CalSTA towards the goal of SJJPA being the operating agency for the Merced-Bakersfield HSR EOS.

FY 2024/25 and FY 2025/26 Operating Plan

The FY 2025/26 and FY 2026/27 operating plan for San Joaquins includes the return of full-corridor service for seven daily round-trips.

Service Pattern in FY 2025/26 and FY 2026/27

Northbound Trains:

Bakersfield – Sacramento: 2 daily trains

Bakersfield – Oakland: 5 daily trains

Southbound Trains:

Sacramento – Bakersfield: 2 daily trains

Oakland – Bakersfield: 5 daily trains

Operating Plans Beyond FY 2026/2027

Commencement of the 8th and 9th Daily Round-Trips

Beyond FY 2026/27, SJJPA plans to launch the 8th and 9th Daily Round-Trips. This expansion of service will increase the total number of daily round-trip trains serving Sacramento from two to four (while maintaining five daily round-trips to the Bay Area). Both of the round-trips serving Sacramento are expected to initially originate/terminate at the San Joaquin Street Station in Stockton and will serve as connecting trains (with a timed transfer) for passengers traveling on San Joaquin Valley – Bay Area trains. SJJPA plans to extend the 8th and 9th Round-Trips to Merced when operations on the High-Speed Rail Early Operating Segment is initiated – implementation of these roundtrips is dependent on completion of double platform projects at Modesto and Turlock-Denair by Caltrans. Ongoing coordination between SJJPA and Caltrans is needed to monitor the funding plan and schedule for delivery of these projects.

Between Sacramento and Stockton, two of the four daily round-trips will utilize the UPRR Fresno Subdivision (which the San Joaquins currently use for service to the Sacramento Valley Station), while the other two will utilize the UPRR Sacramento Subdivision, a corridor currently not used by passenger rail services. While the Sacramento Subdivision does not connect to the Sacramento Valley Station, it does allow for the San Joaquins to provide service to six planned new stations, including four in Sacramento (Natomas, Old North Sacramento, Midtown, and City College), as well as in Elk Grove and Lodi. A shuttle serving the Natomas Station will also meet each San Joaquins train to provide a convenient connection to the Sacramento International Airport .

SJJPA long-range operating plans center on seeking capital and operational funding to greatly increase the frequency of San Joaquins trains between Sacramento and Merced, while maintaining adequate service levels to locations in the Bay Area. With these frequencies, the San Joaquins will be well-positioned to provide robust feeder service to future high-speed rail service between Sacramento and Merced, while truly transforming travel options between Sacramento and the San Joaquin Valley. SJJPA is also planning for expanding service north of the Sacramento Region.

Rail Operating Strategies

The San Joaquins have great potential for increased ridership, revenue, service coordination, and performance. SJJPA has implemented a number of strategies to improve the San Joaquins. Some of the strategies listed are being pursued with little or no additional resources.

Increasing On Time Performance (OTP)

SJJPA recognizes that on-time performance (OTP) is a cornerstone of reliable rail service and a key driver for attracting ridership, especially among business travelers. Through close collaboration with Amtrak, BNSF Railway, Union Pacific Railroad, and DB Engineering and Consulting, we continue to implement strategies to enhance punctuality and ensure a dependable experience for our passengers.

In FY 2022, OTP faced challenges due to third-party impacts such as trespasser interference and BNSF-managed maintenance activities, resulting in a decline to 76.3%. The following year, FY 2023, saw further challenges with unprecedented rainfall and runoff causing flooding and the reappearance of Tulare Lake along the Wasco-Corcoran route segment. This necessitated major track repairs by BNSF, reducing OTP to 64.5% for the year. Recovery efforts were swift, with repairs largely completed by early August 2023, leading to steady improvements. By December 2023, OTP reached 80% for the month, climbing to 84% for January 2024. These gains continued into FY 2024, with OTP improving to 74.2% for the year, reflecting our ongoing commitment to operational excellence.

To sustain this progress, SJJPA remains proactive in addressing challenges. Our strategies include regular conference calls with host railroads, Amtrak, and Caltrans to analyze delay causes, identify solutions, and prevent future disruptions. Looking ahead, SJJPA is committed to continuing to improve OTP, recognizing its critical role in supporting ridership growth and the economic vitality of the regions we serve.

Specific strategies for improving OTP include:

- Deployed a slotted/pulsed schedule with pad-time distributed throughout the route in coordination with CalSTA, Caltrans, Amtrak, BNSF and UPRR. SJJPA expects improvements to the pulse schedule pattern to be implemented with restoration of the 7th round-trip.
- Coordinating with the host railroads to bring dispatchers out to tour the San Joaquins Corridor and ride the trains to develop an understanding of the territory being dispatched.
- Working with the host railroads and Amtrak to identify capital and/or system improvements to improve on-time performance.
- Working with Host Railroads to develop strategies and incentives that will lead to improved OTP, including providing additional incentive-based access payments between SJJPA and the host railroads similar to what has proven to be extremely successful with the Capitol Corridor over many years.

Table 4.1

On-Time Performance of the San Joaquins (Based on Federal Fiscal Year)	
FY 2012	88.1%
FY 2013	77.7%
FY 2014	75.4%
FY 2015	73.6%
FY 2016	84.0%
FY 2017	76.6%
FY 2018	76.9%
FY 2019	66.9%
FY 2020	83.0%
FY 2021	84.6%
FY 2022	76.2%
FY 2023	64.5%
FY 2024	74.2%
Source: Amtrak, 2024	

Other Rail Service Coordination Strategies

- SJJPA will continue to evaluate existing train and connecting bus schedules and determine if there are potential changes which could improve ridership, revenue, and cost effectiveness. Schedule adjustments have the potential to improve the San Joaquins performance without additional resources.
- Assess operational impacts and potential schedule changes from the implementation of planned and potential new stations along the existing San Joaquins Route, including Oakley, and Madera.
- Represent the San Joaquins at quarterly Capital Improvement Team (CIT) meetings with the Union Pacific Railroad (UPRR). Operational issues encountered over the prior month and any upcoming capital and system projects that could affect train performance are discussed at these meetings.
- Participate in quarterly CIT meetings with the BNSF to discuss operational issues encountered over prior months and any upcoming capital and system projects that could affect train performance.
- Work with the Capitol Corridor JPA, LOSSAN JPA, and Caltrans to provide improved connections to the Capitol Corridor and Pacific Surfliner, including initiation of coordination activities necessary to plan for bus connections to the Pacific Surfliner at Newhall on the Antelope Valley line
- In Coordination with SJJPA and CCJPA, Caltrans completed a Project Study Report for a planned turn-around track improvement to enable either CCJPA or SJJPA trains to be turned at Martinez, providing operating flexibility to optimize capacity in the corridor between Martinez and Oakland. In 2025, SJJPA will continue to work with Caltrans and CCJPA to further advance an operating plan, funding plan, and timeline for implementation of the project.
- Coordinate with Caltrans to develop a Service Development Plan for the San Joaquin Corridor and planned extensions meeting State and Federal requirements for the Federal Railroad Administration Corridor Identification and Development Program (see Chapter 5).
- Continue regular coordination between SJRRC and the Tri-Valley – San Joaquin Valley Regional Rail Authority that was re-established in early 2025 on service planning, infrastructure development, and equipment interoperability for services in a universal passenger rail corridor over the Altamont Pass being developed as part of the Valley Link project.
- Historically, the Amtrak San Joaquins service has provided two scheduled stops to Allensworth State Park for two of their highly attended events, Juneteenth on the second Saturday in June and Rededication on the second Saturday in October. To account for passengers traveling from the Bay Area, train 710 has operated on an adjusted schedule. Additionally, limited train stops have been coordinated to support Black History Month. Groups of 15 passengers or more have also been permitted to book travel to Allensworth any time of the year through Group Travel and Kids 'n' Trains program.

Thruway Bus Operating Strategies

Thruway Bus service is a key component of San Joaquins operations, providing important connections to transit systems and tourist destinations, such as Yosemite, San Francisco, and Southern California. Additionally, many routes operate through rural communities, offering corridor-wide connections to San Joaquins trains. However, Thruway Bus service was restricted to ticketed Amtrak train passengers which results in underutilization of bus capacity and high operating costs. Opening key segments of Thruway Bus service to non-rail passengers could reduce operating expenses, increase ticket revenue, increase public and environmental benefits, and complement/augment local and regional bus services.

To accomplish this, SJJPA successfully worked with Senator Allen, RailPAC, Central Valley Rail Working Group, and San Joaquin Valley Regional Planning Agencies' Directors' Committee on getting legislation (SB 742) passed and signed by the Governor that enables bus-only tickets to be sold on state-supported Thruway Bus services. SJJPA is working in coordination with private intercity bus providers and public local and regional bus providers to implement the provisions of SB 742. SJJPA is also pursuing partnerships with public and private operators that

would allow San Joaquins passengers to utilize intercity bus services of other agencies/companies, while allowing non-Amtrak passengers to utilize the same services. By increasing the load factor on connecting bus services (i.e. the number of seats filled on each bus), SJJPA anticipates a significant reduction in operating expenses and higher ticket revenue. As required by SB 742, SJJPA submitted a “Report to the Legislature” on December 27, 2022, regarding the progress of the implementation of the provisions of this bill and its impacts on private intercity bus carriers which is available on the SJJPA website.

Partnership with the Shasta Regional Transportation Agency on the “North State Intercity Bus System”

Shasta Regional Transportation Agency (SRTA) is planning a new express bus service (Salmon Runner) between Redding and Sacramento as part of the proposed North State Intercity Bus System. To fund the necessary capital investments (including several electric buses), SRTA received a TIRCP award in 2018. SJJPA, SRTA, and the Redding Area Bus Authority (RABA), have formed a partnership that would allow San Joaquins passengers currently traveling on Amtrak Thruway Buses from Sacramento to Red Bluff or Redding to utilize the new Salmon Runner service instead, which will provide much faster travel times between Sacramento and Redding as the new line would run along I-5 corridor rather than the more circuitous SR 99 corridor..

As a first step to this express service, SJJPA entered into an MOU with RABA in 2024 as the local transit operator to implement an interim service before the express route is operational. This interim service allows for the planned service change for Route 3 at Chico to occur, with the RABA service continuing north to Red Bluff and Redding, and with the benefit to RABA of proving longer distance service as viable for their operations. The MOU between the two agencies outlines the parameters of SJJPA's financial support, while ensuring San Joaquins passengers have seamless access/ticketing on the new RABA-run interim service and the future Salmon Runner service. SRTA initiated a bus-rail study in 2024 that will revisit and update implementation planning for the Interstate 5 express bus service between Redding and Sacramento, which may require procurement of additional motor coaches, along with close coordination to ensure that RABA is ready to operate the service. SJJPA continues to plan for the Salmon Runner service to be implemented within the next 1-2 years.

Potential Partnerships with North Coast Stakeholders to Optimize Thruway Bus and Other Bus Services

Stakeholders in Marin and Sonoma Counties and farther north along the North Coast have expressed a strong interest in optimizing the Thruway Bus service (Route 7) that currently operates between Arcata and Martinez. SJJPA has engaged in initial discussions with representatives in various cities, State Senator McGuire's office, and officials from Sonoma-Marin Area Rail Transit (SMART) on developing strategies for improving utilization of the existing Thruway Bus service and to provide connecting Thruway Bus service to SMART trains. In 2023, SJJPA, Greyhound, local/regional agencies and other interested stakeholders along the corridor completed work on a Caltrans led study for service integration and improvement along the North Coast (Route 7 Corridor) to increase the usefulness of intercity bus services and other connecting bus services in the North Coast Corridor. Based on the findings of this effort, SJJPA took action to open all bus stop pairs along Route 7 for bus-only ticketing.

Throughout 2024, SJJPA coordinated with stakeholders in Solano and Humboldt Counties to modify service in low-ridership stops in Leggett and Laytonville, and eliminated the Great America stop in American Canyon. On September 20, 2024, the SJJPA Board voted to approve those changes that were made to help make Route 7 trips to Eureka faster and facilitate transfers with the Humboldt Transit Authority North State Express at Ukiah. In late 2024, SJJPA started engaging with transit partners to better coordinate local, regional, and statewide travel through Marin and Sonoma Counties. Through the Marin-Sonoma Coordinated Transit Service Plan (MASCOTS), transit service should be streamlined to connect Bay Area riders to SMART trains and other local and regional partners.

In 2025, SJJPA will work to enhance transit access and integration by collaborating with Sonoma and Marin transit agencies through MASCOTS, as well as working with Caltrans and local and regional agencies along Route 7 to improve service and strengthen connectivity with other transit networks.

Implementation of SB 742 Provisions

SB 742 (Allen) was signed by Governor Newsom on October 8, 2019, and its provisions became law on January 1, 2020. The implementation of SB 742 needs to be phased in over time. SJJPA approved bus-only ticketing for Routes 10 (Bakersfield-Oxnard-Santa Barbara) and Route 12 (Bakersfield-Lancaster-Victorville) at the January 24, 2020 SJJPA Board Meeting and Route 1c (Bakersfield – West Los Angeles), Route 19 (Bakersfield – Inland Empire) and Route 40 (new route between Merced and San Jose) at the March 27, 2020 SJJPA Board Meeting. As specified in SB 742, before offering bus-only tickets on Thruway bus routes, SJJPA consults with and considers local and regional public transit operators to determine if a local or regional public transit operator can provide the planned service and attempt to avoid conflicts with existing public transit services. SJJPA also makes a good faith effort to coordinate with private motor carrier services to provide timely connections with intercity rail services, including agreements to fund modifications or expansions of existing motor carrier services to better coordinate with existing services. The implementation of SB 742 is expected to enhance existing intercity private bus services and to avoid damage to these services if possible. SJJPA's efforts to implement SB 742 are documented, presented, and available for public comment at applicable SJJPA Board Meetings.

Due to the COVID-19 pandemic, implementation of SB 742 was put on hold as to reserve seating capacity for train passengers while overall seating capacity was reduced on both trains and thruway buses at 50% of normal capacity. SJJPA continued with implementation of SB 742 in late 2021, after restrictions on seating capacity had been lifted and ridership was increasing. At the September 24, 2021, SJJPA Board Meeting, SJJPA took action to provide bus-only ticketing to the new Route 1c terminus stop at Santa Monica, and received a report from staff on the status of SB 742 implementation. Bus-only ticketing was made available on most routes by December 2021 (1c, 7, 9, 10, 15, 16, 19, and 40). At the November 19, 2021, SJJPA Board Meeting bus-only ticketing was approved for Route 7 (Martinez – Santa Rosa – Arcata) for bus-pairs not served by Greyhound, and subsequently for all bus-pairs along Route 7 at the July 21, 2023 SJJPA Board Meeting. At the January 26, 2024 SJJPA Board Meeting, Route 3 stops were opened for all Redding and Red Bluff bus-pairs upon RABA implementing their operations of the route between Chico and Redding. Staff will continue work to open all bus-pairs for Routes 3 and 6. Route 3 in particular will remain a priority to open all bus stop pairs for bus-only ticketing regardless of the future operator. Approval for Route 1 is expected to be sought at future SJJPA Board Meetings, but this may occur after the focused work with RABA and SRTA for express service along the I-5 corridor.

Thruway Bus Changes to Create a More Cost-Effective Network

As highlighted in Chapter 2, based on detailed analysis provided by staff, SJJPA took action to make some significant changes to the San Joaquins Thruway bus network in order to create a much more cost-effective network at the May 29, 2020, Board Meeting during most severe effects of the pandemic. Pre-pandemic data from Amtrak showed that several of the San Joaquins Thruway Bus routes were not meeting the state's standards for cost-effectiveness even prior to the pandemic. On September 24, 2021, SJJPA took additional action to maintain many of these measures for the foreseeable future in order to promote a more viable Thruway Bus Network. These changes save the state millions of dollars annually:

- Truncating Route 19 at San Bernardino
- Truncating Route 1c and adding a new terminus stop at Santa Monica
- Not running Route 1b (between Los Angeles Union Station and San Pedro), Route 12 (between Bakersfield and the Antelope Valley); and Route 34 (between Stockton and San Francisco)
- Eliminating the McKinleyville and Rio Dell Scotia stops along Route 7 and adding a new terminus stop at Humboldt State University in Arcata
- Having Routes 10 (Bakersfield to Santa Barbara), Route 9 (Bakersfield – Las Vegas), and Route 18 (Visalia – Hanford – San Luis Obispo – Santa Maria) be provided by private operators with interline agreements with Amtrak. These interline agreements eliminate much of the annual costs to the San Joaquins for these routes since they are based on revenue-sharing to subsidize the service rather than annual fees paid by the state. Operational costs are shifted to the bus vendor in exchange for a portion of the bus revenues generated from these routes

SJJPA intends to initiate connecting Thruway bus improvements tied to restoration of the 7th round-trip in FY 2025/26. Longer-term optimization of the Thruway bus network operated by SJJPA will be identified in the Thruway Bus Network Optimization Plan to be completed in coordination with Caltrans in this timeframe.

Coordination of Operations with Future High-Speed Rail Service

Recognizing the complimentary nature of the San Joaquins and the future high-speed rail system, a Joint Policy Statement was adopted by CHSRA, SJJPA, and Caltrans in 2013 that ensures cooperation and input of local communities on all decisions related to any changes in the San Joaquins and consistent planning between these agencies. As required by the enabling legislation for SJJPA, this 2025/26 SJJPA Business Plan Update is consistent with the 2024 California State Rail Plan (DCSRP) and the CHSRA's 2024 Business Plan.

With California's phased approach to implementing the State's high-speed rail (HSR) project, conventional rail services are particularly critical to the success of the interim service of the proposed HSR system. The San Joaquins (including the Thruway Buses), with its desirable rail connectivity to the Bay Area, Sacramento, and the northern San Joaquin Valley, provides strong support for the proposed HSR Early Operating Segment (EOS), which would run from Merced to Bakersfield. With well over \$30 billion being invested in the California HSR project between Merced and Bakersfield, the improvement and expansion of the San Joaquins as a feeder network should be a very high priority for SJJPA, California High-Speed Rail Authority (CHSRA), the State, the regions, and the FRA, in consultation with the BNSF and UPRR.

SJJPA, along with CalSTA, Caltrans, and the Central Valley Rail Working Group worked cooperatively on the CHSRA's "Merced to Sacramento Connected Corridors North Study." The purpose of this study was to identify elements of an integrated investment program that aligns the goals of rail-planning efforts by SJJPA and the region more closely with the phased implementation of the High-Speed Rail (HSR) program. By collaborating to align regional goals, better passenger rail service can be delivered to the Northern San Joaquin Valley Region, from Merced to Sacramento, than would not be possible with uncoordinated efforts. The Study concluded that an incremental and well-coordinated approach to service expansion and capital investment leading to full HSR deployment will allow the region to achieve better, faster, and more-frequent service, sooner than would occur if each agency pursued their interests independently. The Connected Corridors North Study and CHSRA's coordination with SJJPA resulted in an approach for phased regional investment which is fully consistent with SJJPA's planning for service improvements. This collaborative effort enabled CHSRA to strongly support the joint SJJPA/SJRRC 2018 TIRCP application for providing additional passenger service to Sacramento which will serve as a complementary "feeder" service to HSR and is an important first step towards bringing direct HSR service to Sacramento.

SJJPA strongly supports Governor Newsom's and CHSRA's proposed Merced-Bakersfield HSR EOS with intermediate stops at Fresno, Madera, and Kings/Tulare. SJJPA has been working with SJRRC, CHSRA, Caltrans, CalSTA, and the CHSRA's Early Train Operator (ETO) on planning for integrating the San Joaquins and ACE services with the Merced-Bakersfield HSR EOS. Both the San Joaquins and ACE rail services would directly connect with HSR services at a multi-modal station in downtown Merced. For the San Joaquins, this will require a new track connection between the BNSF and UPRR mainlines known as the Merced Intermodal Track Connection (MITC) Project (see Figure 4.1). In coordination with CHSRA and the City of Merced, the proposed multi-modal station at Merced would be elevated and have a western boundary at "R" Street. SJJPA is taking the lead in the environmental clearance/detailed design for the MITC Project (CHSRA is environmentally clearing the Merced Multimodal Station). To most efficiently integrate the San Joaquins and the EOS HSR service, Merced will become the southern terminus for San Joaquins rail service once operations begin on the HSR infrastructure during the envelope between 2030 - 2033. SJJPA is coordinating with SJRRC to plan and environmentally clear a layover and maintenance facility for ACE and San Joaquins services in Merced as part of the MITC Project (see Figure 4.1). The environmental review process for MITC formally began on January 5, 2023, with the release of the Notice of Preparation (NOP), the draft EIR was released for public comment in July 2024, and the Final EIR will be adopted in 2025. More information for this important project is available on the SJJPA website.

In partnership with CalSTA and CHSRA, SJJPA has taken the lead to ensure that the Madera HSR Station is implemented in advance of the initiation of HSR EOS service (when the San Joaquins truncate at Merced). The Madera HSR Station was a late addition to the HSR system by CHSRA in 2016. As a result, this station was not environmentally cleared by CHSRA, nor was it included in the CHSRA funding plans. SJJPA has accepted the responsibility to environmentally clear, secure funding, and implement the Madera HSR Station. SJJPA is implementing the Madera HSR Station in three distinct phases. The first phase is to relocate the existing San Joaquins Station to a new location on the BNSF line in the vicinity of Avenue 12. The second phase is to implement the improvements needed for the station to become the Madera HSR Station for the EOS – this includes the HSR platform on the east side of the mainline HSR tracks, HSR stopping track that connects to the mainline tracks, expanding the access road to the station, and constructing additional parking. The third phase (Full Build Madera HSR Station) is to build the HSR platform on the west side of the mainline HSR tracks, HSR stopping track that connects to the mainline HSR tracks, and a pedestrian overcrossing to connect the two side platforms. SJJPA completed CEQA for the first two phases in early 2021. Construction of the relocated Phase 1 San Joaquins Madera Station is anticipated to begin in 2025. SJJPA worked with CalSTA and Caltrans to secure the \$134 million in funding necessary for Phase 2. In partnership with Caltrans, SJJPA was able to get \$80 million included in the 2024 Interregional Transportation Improvement Program (ITIP) for Phase 2 and was awarded \$54 million by the FRA to complete the Phase 2 project.

The San Joaquins and ACE rail services will be key feeder services for the Merced-Bakersfield HSR EOS, providing important connectivity to the Northern San Joaquin Valley, Sacramento and to the Bay Area. In addition, the extensive San Joaquins Thruway Bus Network, will provide equally important connectivity to Southern California and the rest of the state (see figure 4.2). The initiation of the Merced-Bakersfield HSR EOS will lead to substantially improved intercity passenger rail service throughout California, with much higher frequencies of service, shorter travel times, better on-time performance, reduced emissions and GHG, improved safety, higher ridership and reduced state subsidies. SJJPA is committed to continuing to work with CHSRA, Caltrans, CalSTA and SJRRC to implement a fully integrated statewide intercity service which utilizes the HSR infrastructure between Merced and Bakersfield that will bring great benefits to the state, demonstrates electrified HSR operations, and leads to the expansion of the statewide HSR network. To help move the implementation of HSR in California forward, SJJPA approved an initial MOU with CHSRA and CalSTA at the November 20, 2020 SJJPA Board Meeting in which each agencies committed on working toward the goal of having SJJPA be the operating agency for the Merced-Bakersfield HSR Interim Service.

Key points from the MOU include:

- CHSRA would be responsible for implementing and providing access to, and maintenance for the HSR infrastructure (including track and railway systems, bridges, platforms) and HSR trainsets.
- SJJPA would act as the operator (indirectly, by contract) of the Interim HSR Service. SJJPA will identify and propose a delegate “Operator”, to be approved by CHSRA, to operate trainsets and stations.
- SJJPA would pay CHSRA a System Access Fee for usage of CHSRA infrastructure and related assets in an amount sufficient to cover the portion of CHSRA's maintenance and overhead costs that are related to the Interim Service.
- SJJPA would work to have a joint Operator for ACE, San Joaquins and HSR.
- CalSTA will work with SJJPA on the best approach for its business plan under this new model. CalSTA will review and approve SJJPA business plans that include plans and budgets for SJJPA to operate Related Services after ensuring that all legal requirements have been met.

In FY 2025-26, and FY 2026-27, SJJPA will continue to work with CHSRA and CalSTA on more detailed agreements, and planning for network integration, interim HSR stations and connectivity, and service operations for the Merced-Bakersfield HSR EOS. In FY 2022-23, SJJPA received funding needed to environmentally clear (CEQA & NEPA) the full-build Madera HSR Station and is the CEQA lead for this effort that began in 2023, with the draft EIR is expected to be released in the spring of 2025. SJJPA is requesting \$500,000 in FY 2025-26 to complete full-build Madera HSR Station CEQA/NEPA and 15% design.

SJJPA continues to execute its tasks related to the joint SJJPA/CHSRA/CaSTA MOU. SJJPA has initiated several coordinating tasks and projects to ensure that progress is made over time with the strategic goal of being prepared to operate initial Central Valley Segment operations. Tasks and projects underway and requiring funding include:

- Ticketing Integration – Technical to support to prepare ticketing for San Joaquins which builds upon work by SJRRC for ACE. Coordination work between SJJPA and CHSRA to prepare technical ticketing documents to support fare integration and ticketing integration in the future.
- Preparations for Universal Operator – Work to prepare for Universal Operator consistent with the intentions of the SJJPA/CHSRA/CaSTA MOU.
- Support for Grants to Complete Capital Program and Operations – Support to continue to apply for grants and various funding opportunities related to completing the capital projects, procuring and upgrading equipment/facilities, and securing operating funds necessary to deliver the joint service plan. The support also includes grants management and compliance post-award.
- Operational Preparedness Support – As SJJPA prepares to perform operational oversight, technical support is required to ensure operation preparedness is structured and progressing, including coordination support with CHSRA, CaSTA, Caltrans, and ETO.
- Service Plan Coordination – As SJJPA continues to coordinate the delivery of the San Joaquins future expanded service, the Service Plan Coordination initiative will work toward the needed service coordination items to ensure the San Joaquins are prepared to initiative coordinated service with other partners.
- Product and Market Development – In preparation for High-Speed product introduction, planning work needs to take place to ensure appropriate passenger experience and necessary market development insight to ensure continuity of service and potential advanced market stimulation.

Table 4.2

High Speed Rail/Early Train Operator Coordination Support (FY 2024/25 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
ZE Transition Plan	\$400,000	-	
Ticketing Integration	\$600,000	\$250,000	\$250,000
Preparations for Universal Operator	-	-	\$800,000
Service Plan Coordination	-	\$500,000	\$500,000
Grants Support	\$900,000	-	-
Operational Preparedness	-	-	\$700,000
Product and Market Development	-	-	\$700,000
Total	\$1,900,000	\$750,000	\$2,950,000

Figure 4.1 – Merced Intermodal Track Connection (MITC) Project

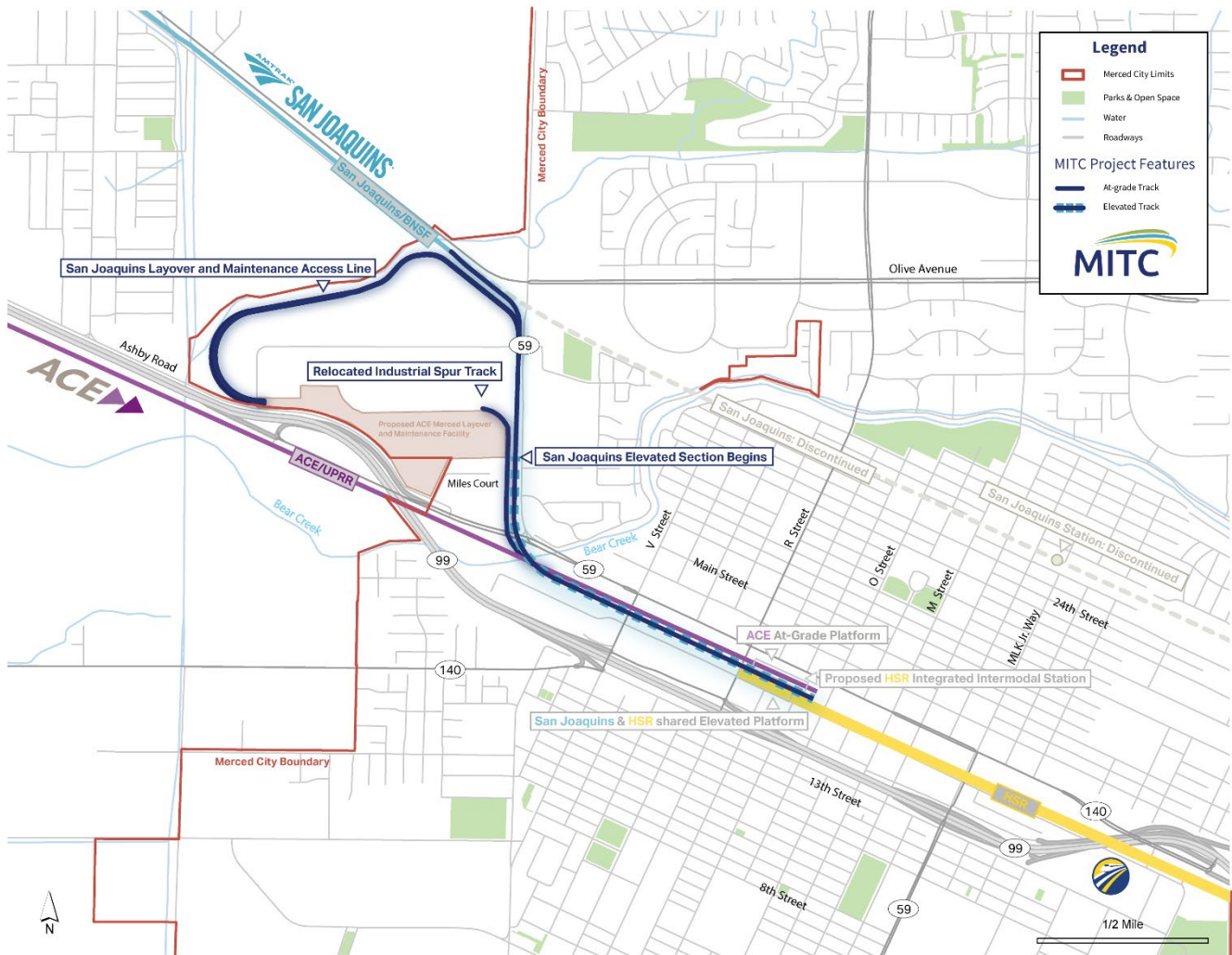


Figure 4.2 - Statewide Intercity Rail and Thruway Bus Network



5. SHORT-TERM AND LONGER-TERM CAPITAL IMPROVEMENT PROGRAMS

A key goal of SJJPA is to build upon the State's efforts to improve the performance and increase the frequency of the San Joaquins and expand ridership through increased awareness of the service and the development of new ridership markets. In 2018, the Transit and Intercity Rail Capital Program (TIRCP) awarded the San Joaquin Regional Rail Commission (SJRRRC) and SJJPA \$500.5 million in funding for the joint "Valley Rail" program. Valley Rail is an integrated expansion of San Joaquins intercity and Altamont Corridor Express (ACE) commuter rail services. As part of Valley Rail, SJJPA has developed an "Estimated 10-Year Capital Improvement Program" to expand the capacity of the San Joaquins Corridor and prepare the San Joaquins to best complement and integrate with future HSR service. This chapter details SJJPA's strategies to deliver the Valley Rail Program to expand the capacity of the San Joaquins corridor, as well as identifying specific projects in SJJPA's Short-Term and Longer-Term Capital Programs.

The Valley Rail Program

Valley Rail improves geographic equity by better connecting the Central Valley counties of Sacramento, San Joaquin, Stanislaus, and Merced to not only each other, but also to the Bay Area. With future High-Speed Rail connections, first between Merced and Bakersfield, and then to San Jose, Valley Rail is poised to become a crucial link to the greater California passenger rail network. This transformative, megaregional project helps further the State's vision for an integrated rail network, with enhanced thruway bus connections, and provides direct mobility and air quality benefits to citizens in nine counties, including over 30% of the disadvantaged communities in California. Valley Rail implements new daily roundtrips for the San Joaquins service to better connect San Joaquin Valley travelers with the Sacramento Area, and an extension of ACE between Sacramento and Merced.

Challenges Associated with the Implementation of the Valley Rail Program

Scope and Scale - The size and complexity of the Valley Rail Program, built within the confines of the freight railroad right of way, is unprecedented in the Central Valley. The capital improvement program, including planned extensions, currently consists of 78 projects, totaling approximately \$3.5B+. Many utilities exist within the freight rail corridors due to their linear nature and thus require miles of relocation to accommodate the new track necessary for passenger service. The sheer volume of engineering submittals, utility reviews and relocations, and construction contracts is an immense challenge for not just SJJPA, but all associated stakeholders.

Schedule Delay - The Valley Rail Program consists of several project segments that improve rail service on ACE and the San Joaquins for the San Joaquin Valley, Sacramento, and the Bay Area. The project segments include Lathrop to Ceres Extension, Sacramento Extension, Ceres-Merced Extension, Stockton Diamond Grade Separation, the Merced Intermodal Track Connection (MITC) project, Madera HSR Station, and Oakley Station. Thus, simultaneous reviews and approvals are required by UPRR and BNSF for the entire Valley Rail Program.

At the beginning of the program, the project delivery schedules assumed engineering review and approval times consistent with historical project timelines when SJJPA was implementing only two to three projects at a time. Since then, the program has expanded to include many more projects, with the quantity of design review submittals increasing proportionally. In 2024, the Valley Rail Program submitted 152 design packages to the host railroads, and in 2025 the program expects to submit 180. This high volume of design review submittals is being reviewed by firms with finite staff capacity, and delayed reviews have impacted the delivery schedule of the entire Valley Rail Program. Despite this challenge, the Valley Rail program staff have worked proactively with contracted design firms and the host railroads to reduce the average submittal review duration by 48% between 2023 and 2024, from 62.5 days to 32.7 days.

The delays in getting final design approved for utility relocations has caused a negative impact on nearly all projects within the Valley Rail Program. Many of the utilities that are being relocated are well over seventy-five years old and are layered and integrated among, and within each other. Redesigning these utilities has been more time consuming than anticipated. The speed of utility relocation is entirely subject to the utility owner’s control. Again, due to the large number of projects and submittals occurring simultaneously, it is a challenge for the companies to perform so many reviews and/or designs in a timely manner.

Cost Increase - Many projects experienced significant cost increases in the design phase. Over the past few years. UPRR and BNSF have modified their design standards for track, sidings, platforms, and layover facilities. Additionally, the host railroads require that their operations are not constrained by project delivery, leading to complex phasing of construction projects to avoid impacts. These design and construction standards are requirements with which SJJPA must comply and changes are not negotiable. This has resulted in cost increases and the need to request supplemental funds to comply with the new design standards.

Since the pandemic, inflation has also increased the cost of all phases of Valley Rail projects, but the impact is even greater for the construction phase. The cost escalation from supply chain issues, labor costs, labor shortages, reduced competition (specifically in rail industry), and rising interest rates are a well-known challenge across many different industries and are being discussed and evaluated nationally and globally in many forums. Inflation has risen by approximately 30%, cumulatively, since the onset of the pandemic in late January 2020. Figure 5.1 below shows this cost escalation from the past 10 years, as reported by the U.S. Bureau of Labor Statistics.

Figure 5.1: 10-Year Construction Materials Cost Escalation



These Challenges associated with schedule delays and cost increases contribute towards substantial increase in the FY25/26 funding request, as outlined in Chapter 10. SJJPA acknowledges and understands that given the constraints with the state budget, the full requested amount may not be provided. SJJPA will continue to work with CalSTA, Caltrans and other funding partners to pursue supplemental and new funding opportunities to capitalize professional services and administrative costs necessary to deliver the Valley Rail Program.

Coordination with San Joaquin Regional Rail Commission (SJRRRC) for Valley Rail Program Delivery

As previously stated in Chapter 1, SJRRRC serves as the Managing Agency for SJJPA and provides the staffing and consultants necessary to oversee planning, operations, and project delivery related to the San Joaquins. In addition, SJRRRC is designated as the lead agency to secure and administer funding, negotiate with the host railroads, and execute all contracts in the shared service corridor between Stockton and Natomas. This helps mitigate any schedule delays on the agency side by eliminating the need for multi-agency approvals for the numerous project contracts and submittals. Additionally, SJRRRC established a Valley Rail Stations and Facilities Committee to further streamline the Board actions on project delivery. This four-member Committee includes two members from SJRRRC Board and two members from SJJPA Board, representing Sacramento, San Joaquin, and Stanislaus Counties and is empowered to approve all strategies and contracts related to the engineering and construction within the shared services corridor. SJRRRC has also built up a dedicated Capital Project Delivery Team consisting of in-house staff as well as seconded staff to focus solely on the Valley Rail Program and support the Stations and Facilities Committee. In FY 25/26, more key staff will be added to the Capital Project Delivery Team.

Figure 5.2: San Joaquins Train at Fresno Station



Valley Rail Planned 10-Year Capital Improvement Program

In coordination with the State, BNSF, and UPRR, SJJPA is in the process of implementing its planned 10-Year Capital Improvement Program, which will transform the San Joaquins Corridor into one that will not only vastly improve intra-Central Valley and inter-Central Valley-Bay Area travel, but also performs as an efficient feeder service to the State's future high-speed rail (HSR) system. The improvements for this program will benefit multiple agencies and other rail services, including freight, and are consistent with the 2024 California State Rail Plan and the 2024 CHSRA Business Plan. A major feature of the Valley Rail program is the creation of a new passenger rail corridor along UPRR's Sacramento Subdivision between Sacramento and Stockton, on which San Joaquins trains are envisioned to share tracks and stations with the ACE rail service. Improvements associated with Sacramento Subdivision are consistent with CHSRA's Connected Corridor North Study to bring early implementation of HSR to Sacramento. The Valley Rail 10-Year Capital Improvement Program also maintains and

optimizes service to the Bay Area and improves safety and security along the San Joaquins Corridor. This program of improvements is designed to allow for seven intercity round-trips from Sacramento to Merced, enable increased intercity service to the Bay Area on the existing San Joaquins route and via the Altamont Corridor, extend some service north of Sacramento to Chico, and provide direct connectivity with the Merced-Bakersfield HSR Early Operating Segment along the BNSF route through the implementation of the MITC Project.

Elements of the Valley Rail 10-Year Capital Improvement Program include:

Corridor Capacity Enhancements for Additional Daily Round-Trips: This program includes the improvements needed for the 8th and 9th Daily Round-Trips, which are detailed in the Short-Range Capital Improvement Program. It also includes improvements for additional round-trips to enable eight daily intercity round-trips between Sacramento and Merced and additional intercity trips to the Bay Area, which are discussed in the Longer-Term Capital Improvement Program. SJJPA completed a service planning study in early 2025 at the request of BNSF for service above 7 Round-Trips, which clarified infrastructure requirements for service up to 9 Round-Trips, subject to review and microsimulation modeling by the railroad.

New Maintenance and Layover Facilities: To support the 8th and 9th Daily Round-Trips, two layover facilities will be needed as part of the Short-Term Capital Improvement Program. To provide additional service between Sacramento and Merced (eventually hourly), a new maintenance facility, and an expanded Stockton Regional Maintenance Facility, will be needed as part of the Longer-Term Capital Improvement Program.

Safety and Improvements: SJJPA is in the process of planning and implementing projects that will improve safety throughout the San Joaquins Corridor, including station lighting upgrades, improved pedestrian crossings at the tracks, new fencing along sections of the corridor with high incident rates, etc. Additionally, SJJPA is working with Amtrak and the host railroads to reduce trespasser and vehicle/crossing incidents along the corridor.

New Stations: As part of the 8th and 9th Daily-Round Trips and establishing service along the Sacramento Subdivision, the SJJPA is currently working to implement up to six new stations north of Stockton, including Lodi, Elk Grove, and four in Sacramento (City College, Midtown, Old North Sacramento, and Natomas). A new station in Oakley is also being implemented, as is a relocated station in Madera. These are contained in the Short-Term Capital Improvement Program. New stations are also being planned for as part of any extension of service north of Sacramento (Plumas Lake, Marysville-Yuba City, Gridley, and Chico). SJJPA is also implementing numerous station enhancement and parking projects to ensure a high-quality passenger experience.

New Equipment: To enable additional round-trips and extensions of service, additional trainsets will be necessary beyond what is currently being procured by the State of California. In the Short-Term Capital Improvement Program, additional trainsets are included for the 8th and 9th Daily Round-Trips. To reach hourly service between Sacramento and Merced, additional trainsets will be needed (see the Longer-Term Capital Improvement Program).

Service Extensions: In conjunction with the 8th and 9th Daily Round-Trips, SJJPA is working to extend service along the Sacramento Subdivision to new locations in Sacramento. Details are contained in the Short-Term Capital Improvement Program. In the longer-term, extensions north of the Sacramento Region (to serve Yuba, Sutter, and Butte counties) and to provide additional intercity round trips via the Altamont Corridor which would terminate at a new Union City/BART Station are being planned. A future extension of service to the Oakland Coliseum/Airport will also be considered as a longer-term possibility.

During implementation of this capital improvement program, SJJPA will continue to work with the State to:

- Secure funding for cost escalation and future projects;
- Prioritize the delivery of key projects;
- Minimize the construction impacts of projects;
- Maximize the benefits of projects on overall service performance; and

- Coordinate with CHSRA regarding MITC Project and Merced Intermodal Station, the Madera Relocated Station, and grade separations or improvements being done to the BNSF track as a result of the implementation of the initial construction of the HSR system.

The Estimated 10-Year Capital Improvement Program consists of a Short-Term Capital Improvement Program (0-5 years) and a Longer-Term Capital Improvement Program (5+ years), both of which are detailed below.

Valley Rail Short-Term Capital Improvements

SJJPA is currently focused on implementing a substantial Valley Rail Short-Term Capital Improvement Program over the next five years. The Program contains four areas of improvement: 8th and 9th Daily Round-Trips based on the service plan requested by the BNSF Railway for service above 7 Round-Trips, Other Station Projects, and Corridor and Other Projects. Each of these four areas of improvement are described below and specific Short-Term project and costs are summarized in Table 5.1.

Table 5.1

San Joaquins Corridor - Short-Term Capital Projects (\$ Millions Construction Year)					
Improvement Program/Project (0-5 yrs)	Project Cost	Funding Secured	Funding Sources	Lead Agency	Status
Short-Term Service Improvements					
Cabral Station Expansion	\$18.02	\$17.71	Measure K / SGR / SRA	SJJPA / SJRRC	Construction 2025
Minor Capital – Station/Service Enhancements	\$.50	\$.50	PTA	SJJPA	Ongoing Minor Capital
8th and 9th Daily Round-Trips					
Track Improvements - BNSF Stock. Sub	\$35.76	\$27.36	TIRCP / SRA	SJJPA / BNSF	Design Select Construction 2025
Valley Rail North (Stations/Track, Lodi, Elk Grove, City College, Midtown, Old North Sacramento, Natomas)	\$537.20	\$415.21	TIRCP / SB132 / ITIP / STA / AHSC	SJRRC / SJJPA / UPRR	Design Select Construction 2025
Track Extension (RMF to Cabral Station)	\$70.56	\$24.05	Prop 1A / CMAQ / FTA 5307 / FTA 5309/ 2016 Earmark / Measure K	SJRRC / UPRR	On Hold
Modesto and Turlock-Denair Double Platforms*	Managed by Caltrans		ITIP	Caltrans / BNSF	Design
San Joaquin St. Layover Project	\$8.10	\$7.00	ITIP	SJJPA	Design Pending
Other Station Projects					
Madera Station Relocation/Expansion	\$49.23	\$49.23	TIRCP / SRA / SB125	SJJPA	Construction 2025
Madera HSR Station EOS Build	\$134.53	\$134.53	SB125 / MEGA / ITIP	SJJPA	Design
New Oakley Station Platform	\$8.28	\$8.28	TIRCP/SRA	SJJPA	Construction 2025
Hanford Station	\$2.74	\$2.64	SRA	SJJPA	Design
Corridor and Other Projects					
Stockton Wye	\$18.71	\$18.71	SRA	UPRR	Construction 2025
Platform Accessibility for High-Floor Cars	TBD	\$0.50	STIP	Caltrans / SJJPA	Construction
Cal PIDS Replacement/Upgrade	\$2.10	\$0.70	CalOES / PTA	SJJPA / CCJPA	Design
Stockton Diamond Grade Separation	\$501.00	\$396.50	BUILD / ITIP / TCEP / TIRCP / SB132 / Measure K / CMAQ	SJRRC / SJJPA / UPRR / BNSF	Design Construction 2025
UPRR South Stockton Yard Crossovers	\$17.00	\$17.00	SRA / TCEP / TIRCP / UPRR	SJRRC / SJJPA / UPRR	Construction 2025
Stockton Rail Maintenance Facility Expansion	\$30.23	\$30.23	ITIP / SJJPA SRA / Caltrans SRA / Prop 16 / CalOES	SJRRC / SJJPA	Close-Out
Source: Caltrans Division of Rail and Mass Transportation and SJJPA, 2025.					

8th and 9th Daily Round-Trips

The deployment of the 7th Daily Round-Trip between Oakland and Bakersfield on June 20th, 2016 was the first step in increasing San Joaquins service frequency. As the 7th Daily Round-Trip was suspended during the COVID-19 Pandemic, and will be reinstated in 2025, SJJPA is continuing focus on improvements needed to increase the frequency of service to Sacramento, with the next step being the implementation of the 8th and 9th Daily Round-Trips that are initially planned to be implemented between Sacramento and Stockton, providing connections to Bay Area to Bakersfield trains, then subsequently extended to Merced when service on the High Speed Rail Early Operating Segment is initiated.

Many of the required capacity improvements for the 8th Daily-Round Trip will be completed between Stockton and Merced within the next ten years. These improvements consist primarily of double-tracking projects (see Table 5.2). There are also plans to install second platforms at four stations over the next few years, which will reduce holdouts, thereby increasing capacity.

Determining improvements needed between Sacramento and Stockton for the 8th and 9th Daily Round-Trips has been more complicated. Running additional passenger trains on this section of the UPRR's Fresno Subdivision would be very difficult. Given this situation, SJJPA began exploring the option of utilizing the Sacramento Subdivision, a parallel UPRR-owned rail corridor to the west in coordination with CalSTA, CHSRA, Caltrans, SJRRC, and the Central Valley Rail Working Group. Feasibility studies by SJJPA/SJRRC and CHSRA determined that the Sacramento Subdivision was the most viable alternative for expanded passenger rail service from the San Joaquin Valley to Sacramento, and UPRR indicated there is potential to provide passenger service on this corridor. In 2017, SJJPA's Board adopted the Sacramento Subdivision as the preferred corridor to pursue future service expansion to Sacramento.

SJJPA was engaged in planning and environmental work to determine needed improvements to establish passenger rail service along the Sacramento Subdivision as part of the development of the 2018 Transit and Intercity Rail Capital Program (TIRCP) grant application. SJJPA worked in partnership with SJRRC on the TIRCP application, as the SJRRC-managed Altamont Corridor Express (ACE) rail service would share the tracks and stations along the Sacramento Subdivision with San Joaquins trains between Sacramento and Stockton. On January 12, 2018, SJJPA and SJRRC submitted the joint TIRCP to CalSTA. On April 26, 2018, CalSTA announced that the SJJPA/SJRRC Valley Rail application was awarded \$500.5 million to expand San Joaquins and ACE services.

The following improvements related to the 8th and 9th Daily Round-Trips (see Table 5.1) were developed and included in the TIRCP application:

- Track Improvements (UPRR Sacramento Subdivision);
- New Stations (six along the Sacramento Subdivision, including Natomas, Old North Sacramento, Midtown, City College, Elk Grove, and Lodi);
- Track Extension (Stockton Cabral Station to the ACE Maintenance Facility);
- Layover Facilities (in Natomas for the Northern Terminus, in Merced, and a temporary facility in Fresno for the Southern Terminus of the expanded service);
- TIRCP application also included Capital Access Fees.

Since the TIRCP funds were awarded, SJJPA-SJRRC has been moving forward toward constructing improvements and stations for the Stockton-Sacramento segment along the Sacramento Subdivision. These improvements will also lay the groundwork for additional round-trips to Sacramento in the future for the San Joaquins and ACE services.

On January 31, 2023, CalSTA awarded SJJPA and SJRRC an additional \$142 million for the Valley Rail Program. These additional funds will ensure the completion of three project areas, encompassing nine individual components, including: (1) Natomas, Elk Grove, North Lathrop, Manteca, Modesto, Ceres, and Madera Valley Rail stations, (2) the Stockton Diamond Grade Separation, and (3) ACE platform extensions at Lathrop/Manteca,

Tracy, Vasco Rd, Livermore, and Pleasanton stations. The projects awarded funding in this TIRCP cycle received grants in previous TIRCP cycles. The additional state resources will help fill funding gaps created by supply chain and inflationary pressures to complete construction while protecting and leveraging significant federal and local investments.

Since 2023, the Valley Rail program has been awarded competitive grant funding from various sources, demonstrating the importance and viability of the program. SJJPA and SJRRC have been awarded an additional \$290 million in state, local, and federal funds from 10 different sources. Federal funding consists of \$55 million from the highly competitive MEGA Grant program for the Madera high-speed rail station. State funding included \$85 million via ITIP, \$71 million via TIRCP, and \$38 million via TCEP, all for various projects. Local funding includes \$13 million SB 125 funding from StanCOG for Modesto and Ceres stations, \$13 million SB 125 funding from Madera CTC for the Madera station relocation and high-speed rail stations, and \$14 million CMAQ funding from SJCOG for Stockton Diamond.

Other Station Projects

In addition to the station projects associated with the 8th and 9th Daily Round-Trips, SJJPA is currently involved in several other station projects.

Relocated Madera Station: SJJPA is working with CHSRA, Madera County, Madera CTC and the City of Madera to relocate the Amtrak station in Madera County. A new station location off Avenue 12 is being implemented to support the potential for greater ridership and transit-oriented development, improve connectivity and accessibility for transit and automobiles. The new station has been designed and environmentally cleared to enable future high-speed rail operations at this location. Funding for the Relocated Madera Station (Phase 1 for the Madera HSR Station) was included in the 2018 and 2023 TIRCP awards. SJJPA also worked with Madera County Transportation Commission (Madera CTC) to secure \$12 million in SB 125 funding in early 2024 to account for cost escalation and fully fund this project. The formal CEQA environmental review process for the relocated station was certified at the January 22, 2021 SJJPA Board Meeting. Construction of the relocated station is expected to begin in 2025. While the CEQA process included clearance for the improvements needed for HSR Early Operating Segment (EOS), CHSRA requested that SJJPA take the lead in getting environmental clearance for the full-build Madera HSR station which began in 2023. CHSRA is expected to be the NEPA lead for this process using its NEPA delegation from the FRA.

New Oakley Station: SJJPA, in coordination with the City of Oakley, Amtrak, and BNSF Railways, will be completing the design phase of the project in 2025. Construction is slated to begin for the Oakley Station Platform Project in mid-2025.

SJJPA included and was awarded the station platform and trackwork in its portion of the 2018 TIRCP application. The City of Oakley is providing matching funds for parking and other station facilities.

Other Station Enhancement Projects Include:

- Lighting
- Signage
- Landscaping
- General repairs
- Parking

Corridor and Other Projects

Stockton Wye: This project will provide a new wye connector track between the UPRR Fresno Subdivision and the BNSF Stockton Subdivision, which will enhance train movement within the busy rail environment of Stockton. Construction will occur in conjunction with the Stockton Diamond Grade Separation project, as the wye is located in the northwest side of the existing diamond. This project supports SJJPA goals of increasing capacity in the San Joaquins Corridor and the frequency of San Joaquins trains.

Platform Accessibility for High-Floor Cars: With the historical operations of the single-level Comet Cars and the launch of the Siemens Venture Cars both of which have high-floors, SJJPA is working on solutions to improve passengers' experience boarding/deboarding the cars that require passengers to utilize steep stairs. The high-floor cars limit accessibility and slow boarding, increasing the dwell time of trains at stations. To improve accessibility and speed boarding for existing and future high-floor passenger cars, SJJPA is currently working to install modular Mini-High Platforms (small sections of the platform that are raised to the same height as the high-floor rail cars and accessible via a ramp from the lower part of the platform) at all existing and planned San Joaquins stations. The stations on the BNSF corridor will be the first to be installed with the UP stations following behind as SJJPA continues to work through the installation designs with the railroad.

Stockton Diamond Grade Separation Project: This project elevates the Union Pacific (UP) Fresno Subdivision tracks over the BNSF Stockton Subdivision, where they currently intersect at the Stockton Diamond. This intersection is the most heavily congested freight bottleneck in California. In addition to substantial freight and environmental benefits, this project will enable future expansion of ACE and San Joaquins services. In partnership with the SJJPA, SJRRC and Caltrans pursued and received \$120 million in state and federal funding in 2020 to implement this critical project, Valley Rail funding will be used as matching funding. ITIP and SB132 funds support the environmental, detailed design and right of way. SJRRC certified the environmental impact report (EIR) on June 4, 2021. The EA for NEPA clearance was released on July 29, 2022, and was completed in August 2022. The project cost has increased significantly due to various factors, such as market escalations, longer project durations related to track and signal construction phasing, as well as municipal and third-party utility costs escalations. SJJPA was able to secure an additional \$101M from TCEP, TIRCP 2024, and SJCOG's CMAQ. However, the project is still not fully funded, and SJJPA plans to aggressively pursue additional funding prior to the allocation deadline/construction start date. Construction is expected to commence in the Summer of 2025 pending approval of all funding partners.

Cal PIDS Replacement/Upgrade: The legacy CA PIDS was originally implemented in the early 2000's, and both the hardware and software components of the system have reached the end of useful life. In 2019, SJJPA and CCJPA terminated its CalPIDS Agreement with Amtrak. SJJPA agreed with CCJPA's request to lead procurement of new PIDS hardware and software for multiple rail agencies in California. CCJPA has rescheduled the implementation of the upgraded CalPIDS system for the San Joaquins and ACE stations to begin in FY2025, instead of the originally planned FY2021. The upgrade is currently delayed due to the vendor selection process managed by CCJPA, impacting the overall project timeline and postponing the deployment of the enhanced passenger information systems. SJJPA understands how important the CalPIDS project is and will explore ways to expedite the project implementation.

Safety Improvement Projects (Lighting, Security Cameras, Fencing, At-Grade Crossing Safety Improvements, and Grade Separations): SJJPA will continue collaborating with Amtrak and the host railroads, Union Pacific Railroad (UPRR) and Burlington Northern Santa Fe (BNSF). This initiative aims to identify specific opportunities to enhance safety measures at designated locations and grade crossings. Our approach includes a comprehensive evaluation of existing grade crossings alongside analyzing traffic patterns. Potential improvements may involve upgrading signage, enhancements to visibility, installing advanced warning systems, and physical modifications to the crossings and access points. The primary objective of this initiative is to mitigate the risk of trespasser strikes and near misses, thereby improving public safety and identifying additional safety enhancements.

Accidents involving intercity passenger rail services and vehicles predominantly occur at "at-grade" crossings, where railroad tracks and roads intersect at the same level. There are hundreds of such at-grade crossings along the San Joaquin Route. The San Joaquin Joint Powers Authority (SJJPA) will conduct comprehensive risk assessments as part of our System Safety Plan and Risk-Based Hazard Analysis Program. We will collaborate with the Rail Commission Joint Safety Committee and establish small working groups comprising representatives from BNSF, UPRR, the Capitol Corridor Joint Powers Authority (CCJPA), Amtrak, and Caltrans to formulate a plan and establish priorities for at-grade crossing improvements.

This initiative will encompass an inventory of all previous incidents at grade crossings along the route, potential enhancements, and identifying key crossings that should be prioritized for future grade separation. Enhancements to grade crossings will contribute to increased safety and improve the operational efficiency of the San Joaquins and freight services.

Federal Railroad Administration Corridor Identification and Development Program

The Corridor Identification and Development Program (Corridor ID) will serve as the basis for prioritizing and funding intercity passenger rail projects included in the SJJPA capital program in future Annual Business Plans. The Corridor ID program was created by the Federal Railroad Administration (FRA) in 2023, which is a requirement of the Bipartisan Infrastructure Law to establish a pipeline of priority projects for federal funding of intercity passenger rail corridors. The program dedicates federal funding for distinct service planning, environmental review and preliminary design stages for corridors accepted by the FRA into the program, following an initial scoping stage to determine inventory and review the status of planning and project development activities in each corridor, and to determine the level of corridor readiness relative to program requirements.

FRA released a call for corridor nominations to be accepted into the initial Corridor ID Program in early 2023. Caltrans prepared and submitted an application on behalf of the SJJPA for the San Joaquins corridor, including extensions to Chico and Redding, which the FRA accepted into the program with an initial funding award to begin scoping the corridor for the program – all corridors were accepted into the initial program at the initial scoping stage, requiring participating States and corridor stakeholders to receive approval from FRA to advance into and complete subsequent Service Development Planning, Environmental, and Preliminary Design stages. The SJJPA will coordinate with Caltrans in 2025 to initiate development of an FRA-approved Service Development Plan that is expected to be complete by 2027.

Valley Rail Longer-Term Capital Improvements

SJJPA is developing a comprehensive program of improvements to increase the frequency of trains beyond the 8th and 9th Daily Round-Trips, reduce travel time, increase ridership, and improve service reliability of the San Joaquins. Longer-term improvements are identified below. The development of these projects will require further review by SJJPA and is subject to approval from the State, Union Pacific, BNSF, local and regional agencies, and other interested parties. In partnership with SJRRC, SJJPA is focused on delivering these improvements and service increases in advance of the initiation of service on the HSR EOS (now expected between 2030-2033).

Expanded Service between Sacramento and Merced

SJJPA aims to continue to increase intercity service between Sacramento and Merced. The purpose of this increase in frequency is twofold: 1) accommodate increasing demand for business travel and leisure day trips; and 2) provide a connection from Sacramento and Northern San Joaquin Valley to the high-speed rail system at the Merced Station. While improvements being planned as part of the 8th and 9th Daily round-Trips will help prepare the corridor for the future, additional infrastructure projects will be needed for additional intercity round-trips providing connections to service being planned for the High-Speed Rail Early Operating Segment.

SJJPA has established a long-term goal of implementing up to 12 Roundtrips (service provided approximately every hour) on the San Joaquin Corridor. Capital requirements assumed for achieving this long term service goal include: increasing the capacity of Robert J. Cabral Station in downtown Stockton, constructing the grade separation of the Stockton Diamond (i.e. the intersection of UPRR Fresno Subdivision and the BNSF Stockton Subdivision), construction of double-tracking projects as necessary based on the service plan for corridor expansion, the MITC Project to enable the multi-modal connection with the Merced-Bakersfield HSR Interim Operating Segment, construction of a new maintenance facility, and the procurement of additional rolling stock. One of the additional intercity round-trips is expected to utilize one of the slots from the ACE extension to Merced

along the UPRR between Stockton and Merced. The full extent of improvements required to reach long-term goals are still being determined, which also assumes additional improvements and/or capital access fees along the Sacramento Subdivision. Optimization of both scheduling and equipment has the potential to reduce the need for physical infrastructure. In addition to optimization, capital access fees are being considered as an approach for implementing service in lieu of constructing infrastructure directly.

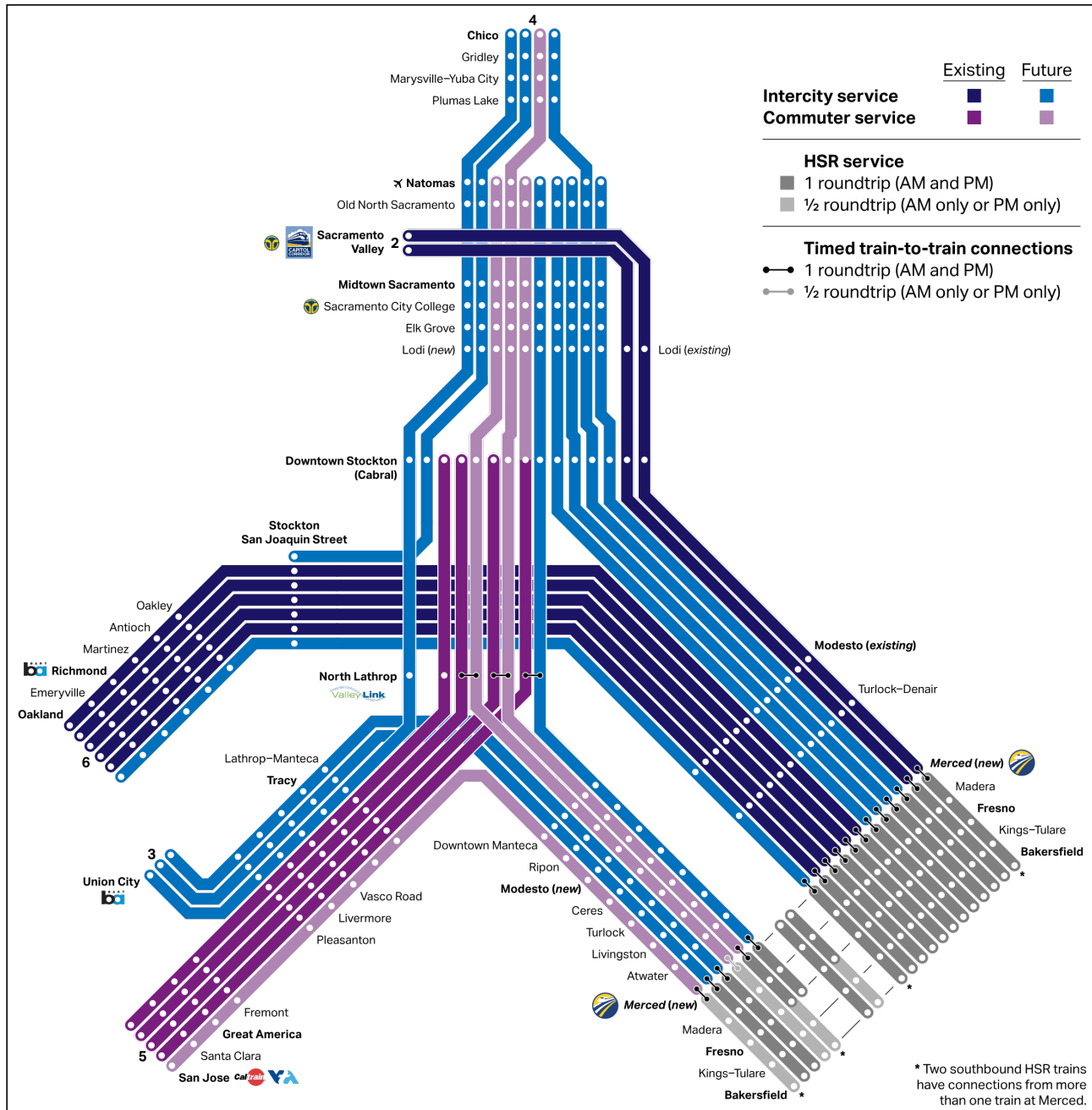
Corridor Capacity Enhancements between Stockton and Oakland

Additional track improvements between Stockton and Oakland would improve the reliability of existing service as well as possibly allow for an increase in the number of daily round-trips from the five that operate today. Caltrans has previously identified a variety of improvements between Oakley and Port Chicago that SJJPA is considering. Significant investment would also be required between Port Chicago and Oakland for improvements to allow additional train service to Oakland (from Martinez) for either the San Joaquins or Capitol Corridor. Additional specific projects still need to be identified to understand the full extent of the improvements needed. SJJPA will work with Caltrans, CCJPA, BNSF, and UPRR to determine the needs that remain beyond the current projects identified and will be continuing to work with CCJPA and UPRR on the Caltrans led study effort for determining what improvements would be needed in order to be able to make Martinez a future transfer station (so some additional round-trips might terminate at Martinez in the future). SJJPA is planning for one additional San Joaquins round-trip between Stockton and Oakland by the time the HSR EOS is operational (2030-33).

Merced Intermodal Track Connection (MITC) Project and Merced Layover

As described in Chapter 4, the MITC Project includes a new track connection from the BNSF corridor to the proposed integrated HSR station in downtown Merced between R and O Streets. The connection with the HSR EOS at Merced will also require the expansion of the approved ACE Merced Layover and Maintenance Facility to include new and upgraded tracks for San Joaquins trains and joint use of the initial facility for both ACE and San Joaquins trains.

Figure 5.3: Estimated 10-Year Capital Improvement Program Service Goals



Longer-Term Projects Beyond 10-Year Program (Under Development)

Beyond the ten-year planning horizon, SJJPA will consider pursuing an extension of the San Joaquins to Butte County (Chico). SJJPA partnered with the Butte County Association of Governments (BCAG), Caltrans, and SACOG on initial planning work that could lead to service north of Sacramento. The 2024 State Rail Plan identifies a San Joaquins Extension to Chico as a potential “long-term” expansion of the San Joaquins, and SJJPA is working with Caltrans, and local and regional partners to continue to further examine this possibility through the state’s Corridor ID planning effort. The Corridor ID effort will include investigating the infrastructure needed to allow for future service to directly link between Valley Rail service (and extended service to Chico) along the Sacramento Subdivision with Sacramento Valley Station (SVS).

As an expansion of the Valley Rail Program, SJJPA will continue to work with SJRRC, Caltrans and local and regional partners to plan for having some intercity service utilize the Altamont Corridor to bring additional connectivity for the HSR EOS to Northern San Joaquin Valley and Bay Area markets (Southern Alameda County the Silicon Valley). Having intercity service along the Altamont Corridor has been a service expansion goal of the SJJPA for many years. SJRRC partnered with MTC and Caltrans on planning for the connection to Union City/BART, which is included in the 2024 State Rail Plan as a long-term project. In addition, SJJPA is coordinating with SJRRC, Caltrans District 10, San Joaquin COG, and the Tri-Valley – San Joaquin Valley Regional Rail Authority (Valley Link) on the potential for a new shared-use passenger infrastructure in the Altamont Corridor. SJJPA and SJRRC will also seek opportunities for private sector funding in the development of a substantially improved Altamont Corridor alignment.

In the future, SJJPA may consider an extension from the current terminus at Oakland Station to the Oakland Coliseum/BART Station (currently served by Capitol Corridor trains). Extending the service just five additional miles to this station would provide another direct link between the San Joaquins and BART, as well as new connections to the Coliseum complex and the Oakland Airport via the BART to OAK Automated Guideway Transit service (formerly called the Oakland Airport Connector).

Another project that could be considered beyond the ten-year planning horizon is to consolidate Stockton's two rail stations at Cabral Station, which would enable Stockton to be served by a single station, providing a safer environment for passengers, more secure parking, a direct connection to Sacramento –San Joaquin Valley trains, ACE commuter trains, and promote transit-oriented development. An alternative that could be investigated for Stockton is relocating the "San Joaquins Street" station to a location in the vicinity/east of the Stockton Diamond Grade Separation Project. This alternative would enable this relocated station to provide direct service to both the Bay Area and to Sacramento.

6. PERFORMANCE STANDARDS AND ACTION PLAN

Pursuant to AB 1779, the Secretary of CalSTA submitted a set of uniform performance standards on June 30, 2014, for all state-supported intercity passenger rail corridors. These standards require the administrators and operators of these intercity services to control costs and improve efficiency. SJJPA adopted the CalSTA performance standards on September 27, 2014.

CalSTA identified three uniform performance standards measures to be used for the State supported intercity passenger rail services: usage, cost efficiency, and service quality.

Usage – measured by passenger miles and ridership.

Cost Efficiency – measured by farebox recovery and total operating cost per passenger mile.

Service Quality – measured by endpoint on-time performance, all-station on-time performance, and operator responsible delays per 10,000 train miles.

In support of the State's performance standards, SJJPA has developed measures to continuously monitor the financial, operational, and ridership performance, as well as outreach effectiveness of the San Joaquins. Additionally, SJJPA already has and will continue to develop strategies to maintain successful performance of the San Joaquins. Due to the COVID-19 pandemic, public transit across the United States has experienced a precipitous decline in ridership and revenue. In response to the COVID-19 ridership and revenue environment, SJJPA, along with CalSTA, Caltrans, CCJPA and LOSSAN JPA, have focused on monitoring performance of the intercity passenger rail system, developing strategies for cost control (including service ramp-up from suspensions), and continually moving the system toward ridership and revenue recovery. In addition to the CalSTA performance standards, SJJPA has focused on the environmental impact of the San Joaquins and its role in helping to create a more sustainable California. Increases in San Joaquins ridership benefit the environment by reducing air pollution and greenhouse gas emissions and help to encourage sustainable, transit-oriented development. It is estimated that in FY 2019, San Joaquins passengers (including those on Thruway Buses) traveled over 240 million passenger miles, resulting in a significant net reduction in CO2 emissions. Starting in 2022, all new RFPs for the thruway bus program will require renewable diesel and all routes currently use either renewable diesel or renewable diesel 99. Additionally, SJJPA has now fully transitioned to renewable diesel fuel in all locomotives, which further reduces emissions, while also looking ahead to the planned 8th and 9th Daily Round-Trips and other proposed service increases.

FY 2024/25 and 2025/26 Action Plan

For FY 2024/25 and FY 2025/26, SJJPA will continuously develop action plans with service criteria and objectives to increase ridership, control costs, improve quality, increase the benefits of the San Joaquins Corridor, and better integrate all corridor-serving public transit systems with the San Joaquins (including dedicated Thruway Bus services). Each action will be part of SJJPA's overall management of the San Joaquins as a transportation product in a highly competitive travel market. The following is a list of areas to be covered :

- Negotiate additional revisions to the Amtrak operating agreement to improve performance reporting and decrease operating costs. Plan to reinvest these savings to improve service.
- Work with CalSTA, Caltrans, Amtrak, BNSF and UPRR to restore San Joaquins service to pre-COVID-19 levels.
- Continue to work jointly with the CHSRA, Caltrans, and CalSTA to develop viable strategies and solutions to support phased implementation of high-speed rail and to meet the needs of the San Joaquins and the stakeholder communities of the San Joaquins Corridor. This includes continuing Network Integration planning, EOS operations planning and detailed agreements, and coordination to support the success of the Merced-Bakersfield HSR EOS.

- Complete the environmental and detailed design work for the MITC Project.
- Coordination with Caltrans as an essential stakeholder in the Federal Railroad Administration's (FRA) Corridor ID Program for the intercity service envisioned in the SJJPA's 10-year capital improvement program, Valley Rail, and North Valley Rail.
- Support the California Integrated Travel Program (CalITP) efforts and the early deployment of a pilot program that would include California's intercity and commuter rail services.
- Implement Valley Rail improvements needed for the planned 8th and 9th Daily Round-Trips in conjunction with UPRR, BNSF, Amtrak, and the State, and seek funding for improvements to enable further expansion of the San Joaquins between Merced and Sacramento to increase connectivity to HSR EOS.
- Contribute to the ongoing fleet analysis being conducted by Caltrans, which is examining ways to maximize deployment and scheduling efficiencies along the San Joaquins and Capitol Corridors, allowing for increased capacity for rail service and more efficient utilization of equipment.
- Support state efforts to transition to a zero-emission fleet for rail services as the first corridor to run hydrogen-powered trains for intercity passenger rail service in the United States.
- Participate in the Statewide Working Group Fleet Management focus group that will address issues such as the retirement of the Comet Cars from regular service and the deployment of the new Siemens rolling stock (including any additional infrastructure associated with the new equipment).
- Continue SJJPA's Marketing and Outreach efforts.
- Develop the SJJPA Business Plan Update for FY 2026/27.
- Work with Caltrans and CCJPA to develop a funding plan and timeline for implementation for enabling trains to be turned at Martinez. Continue to coordinate with UPRR, BNSF, and Amtrak on schedule and train performance .
- Conduct market research to solicit feedback from passengers and potential riders to understand existing ridership markets and to identify emerging markets.
- Monitor and report on the status of Business Plan commitments.
- Continue to refine SJJPA's Capital Improvement Program.
- Work to improve coordination of fares and service schedules with connecting transit systems.
- Continue to evaluate measures to improve train and Thruway Bus performance, including modifications to existing service routes and opening more routes and city-pairs for bus-only ticketing.
- Coordinate with state and regional partner agencies to advance planning and implementation of express intercity bus service along the Interstate 5 Corridor between Redding and Sacramento to replace intercity bus connections operated by RABA between Chico and Redding
- Implement a pilot program for an additional Thruway Bus route to serve passengers from Southern San Joaquin Valley and Southern California via Merced to Silicon Valley terminating in San Jose with stops at Los Banos and Gilroy.
- Continue to explore new partnerships with public or private bus operators and implement the provisions of SB 742 with the goal of allowing non-Amtrak passengers to utilize excess seating capacity on buses that connect with San Joaquins trains to save on operations costs.
- Monitor and expand the programs with transit agencies to improve and promote connectivity between the trains and local transit services, and encourage cities, regional governments, and transit agencies to pursue additional Caltrans Sustainable Planning grant(s) to study increased connectivity at San Joaquins stations focusing on improving service to underserved disadvantaged/priority populations.

- Partner with SJRRC, SACOG, Sacramento Regional Transit (Sac RT) and the City of Sacramento on a grant-funded planning effort near the planned Old North Sacramento station of the Valley Rail Program to enhance connectivity and land use compatibility around this critical station area.
- Explore implementing a business class section and/or “Quiet Car” on trains.
- Work with Amtrak to increase performance tracking through detailed monthly reports on ticketing (including e-Ticketing), delays, and food service.
- Work with UPRR, BNSF, Amtrak, and State to grow ridership and revenue by improving reliability, adjusting the service plan, and/or implementing projects that add capacity and reduce travel times.
- Work with Amtrak to secure additional cost efficiencies to be reinvested in service enhancements.
- Continue planning and environmental work related to additional service to Sacramento in coordination with BNSF, UPRR, CHSRA, CalSTA, and the Central Valley Rail Working Group.
- Continue the deployment and marketing of new Venture Car trainsets.
- Coordinate with Caltrans and Amtrak to identify and implement equipment modifications to increase reliability, improve passenger amenities, and improve service.
- Coordinate with Caltrans and the Statewide Intercity Passenger Rail Working Group to identify rolling stock needed for increased service levels.
- Develop and work to establish a program to provide subsidies for residents of disadvantaged communities within the San Joaquins Corridor who cannot afford the regular fares.
- Continue to work with CHSRA, Amtrak, the City and County of Madera, and CalSTA to relocate the Amtrak Madera station at Avenue 12 (Madera HSR Station Phase 1) that would provide a seamless connection between the San Joaquins and future high-speed rail service, as well as improved access over the existing Madera Amtrak Station.
- Complete CEQA/NEPA clearance for the full-build Madera HSR Station (Phase 3). Continue to support Madera County and City of Madera efforts to carry out their successful Caltrans Sustainable Transportation grant award to develop a specific plan for the station area and much of southern Madera County.

7. ESTABLISHMENT OF FARES

SJJPA will work with Caltrans and Amtrak to develop fares ensuring the service is attractive and competitive with other modes of transportation along the corridor. Available ticket types on the San Joaquins are: one-way, round-trip, 10-ride tickets, and monthly passes. The multi-ride tickets, and tickets purchased by seniors, students, veterans, military personnel, the disabled, and children under the age of 15 are sold at a discounted rate. In February 2023, Amtrak removed the restriction of one discounted child per fare-paying adult. Now, children 15 and under are 50% off up-to-7 children for a fare-paying adult. Additionally, Amtrak provides reduced fares for groups of more than 15 people. A “Friends and Family” discount program has been established for the San Joaquins, enabling small groups of 2 to 6 passengers to travel for less every day of the week with the exception of a few black-out dates during peak travel periods. Passengers that buy one full-fare ticket save 50% on up to five companion fares with the Friends and Family discount.

In 2018, with an initiative aimed at upholding long-established discounts for riders, the three California JPAs (CCJPA, LOSSAN, and SJJPA) collaborated to create California Everyday Discounts. Seniors, students, military (veterans and active duty), and passengers with disability are able to receive a 15% discount for any trip across the three services. This came after a decision from Amtrak to reduce the discount under their national tariff fares for these passenger types to 10%, which all three JPA's were against. Since that time, the California Everyday Discount program remains well-supported by each agency and sees regular usage from passengers, despite the fact that they required to use a discount code.

The current fare policy for the San Joaquins is reserved ticketing with no revenue management. The reserved ticketing policy requires a passenger(s) to purchase a ticket(s) for a specific train/thruway bus for a specific date of travel. Reserved ticketing helps operations better control the inventory of available seats to prevent standing conditions, especially during high traffic periods. The San Joaquins have a single, “one-bucket” fare grid with a peak fare plan for high traffic periods. The fare grid utilizes a distance-based methodology with a descending per mile rate as the length of the trip increases. A 5% overbooking policy is in place to ensure no undue sold-out situations occur on short segments of the corridor. Reserved ticketing alerts ticket purchasers of “at-capacity” trains to help encourage them to purchase tickets for a less impacted train or another date.

SJJPA will investigate other opportunities to increase fare revenue, including but not limited to:

- Diversify product offerings by adding a Business Class;
- Institute regular fare increases
- Promote and educate the community on use of bus-only trips in the corridors unlocked due to SB 742;
- Explore State or JPA controlled ticketing technology provided it can be incorporated into the Amtrak reservation and capacity technology;
- Continue and expand the transit connectivity programs such as the Transit Transfer Program, joint ticketing, and transfer of motorcoach bus routes to parallel local transit services;
- Increase public awareness of the Service to increase ridership and revenue;
- Encourage new riders by promoting discounts for group travel and families; and
- Partner with established events to promote untapped ridership (i.e. Battle of the Bay, Allensworth State Historic Park, Hanford Winter Wonderland, Farm to Fork, etc.)
- Explore establishing a program to subsidize tickets for residents within disadvantaged communities along the San Joaquins Corridor who cannot afford to pay regular San Joaquins fares.

8. SERVICE AMENITIES AND FOOD SERVICE

The San Joaquins boasts many great amenities that are integral to the attraction, satisfaction, and retention of riders as they are key marketable features of the service that add value to the customer experience program. To ensure that amenities align with rider expectations and with what is available in the market, SJJPA conducts ongoing research, surveys, and performance measurements to assess the overall health of the customer experience program as well as to identify opportunities to elevate the existing offerings. SJJPA collaborates closely with Caltrans, Amtrak, and the other JPAs to advance program initiatives that can be expanded throughout the state. The customer experience program includes service amenities such as:

- Complimentary Wi-Fi on Trains and Thruway Buses
- Onboard Entertainment Package
- Bicycle Storage
- Comfortable and Versatile Seating
- Food and Beverage Service

Onboard Wi-Fi and Entertainment

All coaches in the Northern California Fleet offer complimentary Wi-Fi to riders, allowing them the opportunity to remain productive during their trip, or explore the diverse entertainment media available via the Wi-Fi portal. The FY 20/21 Wi-Fi system upgrade allowed for the introduction of the portal which boasts content such as blockbuster films, television shows, digital books and magazines, as well as a marketplace to feature San Joaquins and partner promotions. Usage of the portal has seen a steady growth of about 15% for FY 24/25 compared to FY23/24 . Management of the Wi-Fi service is performed in coordination with SJJPA, CCJPA, Caltrans, and contracted services. SJJPA is working with CCJPA and contractors to expand the entertainment package to Thruway Bus services as part of a pilot program.

Bicycle Storage

With many popular bikeable destinations located along the San Joaquins route, bicycle storage is promoted as an important amenity. Bi-level coaches have bicycle storage units that hold three bicycles on the lower level of the car. In addition, 14 first generation California Cab Cars (8300-series) have undergone a retrofit to hold 13 bicycles as opposed to 7 bicycles. The five Surfliner Cab Cars (6000-series) have storage space for up to 13 bicycles in the lower baggage area. The Siemens Venture cars hold 3 bicycles per train car in a convertible luggage storage rack.

Comfortable and Versatile Seating

The bi-level and Venture coaches feature comfortable seating that help distinguish train travel from other forms of transportation, offering passengers a travel experience without a middle seat, ample leg room, and plenty of overhead storage. Additionally, the San Joaquins provide free checked bag service at select stations for up to two bags, and passengers permitted two carry-on and one personal item. With power plugs available at each seat, passengers can keep their devices connected and fully charged throughout their entire journey. Seating versatility is another option for the San Joaquins service, as coach cars provide two options for individual and group seating. Individual seats have drop-down, lap trays for items such as food and laptops as well as footrests. Group seating can accommodate up to four passengers with a shared table for food, work, games, and more. The Venture car equipment not only matches but expands upon the seating comfort and versatility from that of the bi-level coaches. Power outlets have been moved between seats, so passengers sitting in the aisle have equitable access, shared tables include a personalized retractable section that creates better ergonomics for the use of laptops, and moveable armrests allow for maximum relaxation

Food and Beverage Service

The positive evolution of the food and beverage program remains a top priority for SJJPA, while at the same time being able to address initiatives related to escalating program costs, new equipment, and overall passenger experience. Recent programs modifications that have been introduced or will soon be rolled out are:

- Providing complimentary snack boxes for two daily trains without Cafe Car (2021)
- Creating Snack Stations for four daily trains with Venture Car equipment (2024)
- Onboarding a third-party provisioner for food and beverages (2025)
- Transitioning all San Joaquins over to complimentary snack service (2025)

With the delay in the implementation of the vending solution onboard Venture Cars, SJJPA leveraged an existing model of providing passengers with a complimentary snack box. Having monitored the strategy and considered passenger feedback, though the complimentary snack box was appreciated, many of the items within the box were left uneaten, causing unnecessary waste. To evolve the complimentary service, SJJPA introduced the 'Snack Station', a single item grab 'n' go service onboard the Venture Cars. This new version provided passengers with several options to choose from while maintaining similar and at times lower costs than the snack boxes.

Transitioning to full complimentary service not only creates cost savings over trying to retain full Cafe Car service on some trains, but it also supports having equitable experience for all passengers regardless of which train or equipment they board. To achieve this, as part of a pilot program, SJJPA is working directly with a third party provisioner that can supply the items used for complimentary service in Bakersfield. This new program will also help SJJPA establish a business case in the market for provisioners to work directly with transportation agencies on similar projects, including vending machines, which has been a challenge in prior procurement attempts.

The next phase of the program will be for SJJPA to introduce vending machine equipment onto the Venture Car trains. In addition to satisfying compliance standards, there will be vending car modifications that include creating a storage area and kiosks, all of which will allow for the return of onboard, attended sales on all trains. Additional interim solutions will continue to be explored that align with improving rider satisfaction, including other projects such as introducing Business Class to the service. SJJPA is requesting \$2,340,000.00 for program costs.

9. MARKETING AND OUTREACH

The San Joaquins integrated train and Thruway Bus service spans nearly the entirety of the State of California and into Nevada, and is comprised of 18 stations, 9 bus routes, has a marketing footprint of 10 designated marketing areas (DMAs), and connects riders to over 100 destinations along the route. To support the ridership growth and retention for seven daily trains—five operating between Bakersfield and Oakland and two between Bakersfield and Sacramento—along with more than half of riders of the Thruway Bus service, the SJJPA passenger experience and marketing department employs a mix of marketing program strategies that include:

- Brand Management and Advertising
- Communications and Public Relations
- Community and Stakeholder Outreach
- Destination and Organizational Partnerships
- Passenger Appreciation and Engagement
- Market Research and Data Analysis
- Marketing Program Funding

Marketing Program Funding

SJJPA is requesting a yearly allocation of \$1,750,000, equivalent to what was requested last year, to facilitate marketing and advertising to the entirety of the San Joaquins corridor. This allocation will enable SJJPA's marketing and outreach program activities to keep pace with the rising inflationary costs that impact direct expenses such as paid media and digital advertising. Additionally, as initiatives related to critical programs such as Valley Rail and zero emission locomotive conversions advance, there will need to be an expanded requirements for public relations and public outreach, which is accounted for in this funding request.

Marketing Program Activities

Brand Management

As the managing agency for the San Joaquins, in addition to ensuring the successful operation of the service, SJJPA is responsible for developing a program and budget necessary to manage the brand and grow ridership. Under the operating agreement with Amtrak, SJJPA can use the Amtrak San Joaquins service name and marks in its promotion of the service; however, all rights are owned by Amtrak, unlike CCJPA which owns the trademark for the Capitol Corridor. In recent years, SJJPA has been taking on more direct responsibility for the operations of the San Joaquins and that, coupled with the advancement of the Valley Rail program and California High Speed Rail, the need to proceed with rebranding the Amtrak San Joaquins service has become critical.

Rebranding Project

SJJPA has laid the groundwork necessary for the huge undertaking of rebranding the service, which has included: qualitative and quantitative market research; working with focus groups; auditing our website, social media, and advertising performing; and rider testimonials. Beyond creating a new name for the service, a brand architecture was developed to ensure that SJJPA would be effectively positioned to manage a service that lives up to its Mission, delivers with the right Tone in its messaging, and accurately reflects its Vision. During this process, SJJPA aimed to address current challenges and with new, more accurate desires.

Table 9.1

Current Brand Challenges	New Brand Desires
Difficult to spell	Represent California – San Joaquins serves almost the entire state.
Limits assumed scope of services	Encompass both Train and Bus
Investment does not match ownership	Keep flexible for future integrations and plans

Finally, as with any strong brand, it must accurately reflect riders' key reasons to believe, which can be summed up in SJJPA's promise to keep affordability, connectivity, passenger-centric focused solutions, and enjoyment of the service top of mind. With the support of the SJJPA Board of Directors, Amtrak, and Caltrans, SJJPA will be adopting a new name for the service in FFY25 and bringing it to market in early FFY26. The successful launch of the rebranding will require and encompass updating a large swath of assets, including digital (website, social media), physical (train equipment, bus livery, station signage, bus stop signage), and communication (advertising, marketing collateral, outreach) elements as well as effective coordination with Amtrak. As this effort is above and beyond the traditional scope of the marketing program, which will be running concurrently, to manage all aspects of this project an additional rebranding allocation is being requested in the amount of \$1,500,000.00. Those funds would be used as follows:

Table 9.2

Rebranding Budget Request	FY25/26	FY26/27	FY28/29
Equipment Repainting <i>Venture Car Decals</i> <i>Bi-Level Restriping</i> <i>Thruway Buses</i>	\$700,000.00	\$700,000.00	\$700,000.00
Signage and Passenger Information <i>Stations, Onboard, & Bus Stops</i> <i>Accessible Boarding Technologies</i>	\$350,000.00	\$300,000.00	\$250,000.00
Marketing and Advertising <i>Website Design</i> <i>Graphic Design</i> <i>Paid Advertising</i> <i>Public Service Communications</i>	\$275,000.00		
Outreach and Engagement <i>Outreach Materials</i> <i>Community and Stakeholder Activations</i> <i>Media Events</i>	\$175,000.00		
Total	\$1,500,000.00	\$1,000,000.00	\$950,000.00

Advertising, Communication, and Public Relations

SJJPA engages in targeted advertising campaigns through both digital and traditional advertising channels. The advertising program utilizes a multi-touch methodology wherein multiple mediums are employed to reach a broad base of current and prospective riders with key messaging about the service, destinations, and offers. Digital advertising tactics include display ads, paid search, digital radio, social media, and pre-roll video advertising. SJJPA has been able to refine targeting efforts to reach audiences with the most conversion potential by leverage data collected through market research, rider engagement, and owned channels such as the website and email lists. Traditional advertising channels such as television, radio, print, billboards, and sponsorships remain a viable means for increasing brand awareness more broadly.

In addition to being a source for centralized service-related communications, SJJPA's owned channels allow for the establishment and deepening of relationships with current and prospective riders. Current communication

channels include email, social media accounts, and the website. These channels are essential for being able to engage with riders, as SJJPA does not own customer information, as that lives with Amtrak; however, with the plans to introduce a new ticketing system, SJJPA will not only be able to maintain data, but leverage that information improve rider experience by creating direct feedback loop, encourage frequency of ridership with personalized offers, establish a loyalty program, and develop more relevant content to improve channel performance.

SJJPA's social media portfolio includes Facebook, Instagram, Twitter, YouTube, TikTok, and most recently Pinterest. Strategic development of a variety of paid and organic content for these platforms is essential to reach a broad audience based on demographics such as age, gender, location, and income. In addition to using content creation as a means to reach new audiences, SJJPA has also begun working with macro- and micro-influencers, college student ambassadors, and destination partners.

Over the next several years, SJJPA will be heavily engaged with service expansion, new station launches, project kickoffs, and network integration. To support these initiatives and various program milestones, staff have been working strategically to ensure that proper funding sources are in place. These combined efforts, which are accelerating, requires SJJPA to take an even more proactive role in its storytelling and building a larger strategy around, while at the same time ensuring that community engagement and representation remains intact and is elevated. SJJPA intends to expand its suite technological resources to allow for better insights into earned media and tracking for public engagement.

Outreach, Stakeholder Engagement, and Partnerships

SJJPA contracts with qualified Outreach Teams to develop creative strategies for stakeholder engagement, community partnerships, tabling at events, university and college outreach, media relations, and partner development. Each Outreach Team is geographically located throughout the state to be an on the ground presence for the San Joaquins and as content experts for engaging with communities in their markets.

- Stakeholders are vital to promoting the service, improving local presence, and activating communities to ride the train. Stakeholder education meetings and presentations have been a successful way to create champions from organizations like; chambers of commerce, bicycle coalitions, university Alumni Associations, League of California Cities, and California State Association of Counties. SJJPA also coordinates and hosts regular meetings of the San Joaquin Valley Rail Committee (SJVRC), a technical advisory committee composed of a diverse group of rail advocates from various backgrounds and affiliations. Committee members represent all the counties through which the San Joaquins operate, as well as Thruway Bus regions including Los Angeles, San Francisco, and Northern California. SJVRC members provide critical feedback to SJJPA on how to improve the San Joaquins from the perspective of ordinary citizens.
- Service education and awareness is an important grassroots marketing principle. To educate corridor communities and stakeholders, Outreach Teams frequently give presentations to community groups, organizations, school groups, businesses, and others to grow awareness of the service and cultivate community ambassadors and to identify opportunities for group travel along the route. With Hispanics comprising 37% of California's population, recent data supports that 46% of San Joaquin riders are Hispanic. SJJPA and Outreach Teams will continue tailoring outreach strategies, providing promotional materials in Spanish, and utilizing new informational outlets that reach the high-density Hispanic Community locations throughout the San Joaquins corridor, such as the Mercado program.
- There are many colleges and universities accessible by the San Joaquins service. SJJPA has invested in making travel more affordable for students by offering a variety of discounts that are ideal for their anticipated travel needs. Outreach Teams are responsible for developing and managing relationships with key educational partners to promote the service, provide marketing collateral, educate them on the service area, and look for opportunities for them to market to students on our behalf. Explore

opportunities to develop and nurture relationships with student ambassadors as additional resources to help promote the service to different audiences. For deeper penetration of brand awareness on campuses, the Student Ambassador program provides an opportunity for current students to help promote the service via their own social media channels and at on campus events. The success of the program continues to build year-after-year with over 80 applicants submitted for the 24-25 academic year, of which 10 were selected to be ambassadors.

- To meet current and prospective riders in their communities, SJJPA and Outreach Teams table at local community events in the corridor to hand out service information, promote key destinations and discounts, provide train safety information, and listen to the community's feedback on the service. Event tabling is an important strategy for reaching Hispanic and disadvantaged communities, allowing Outreach Teams to meet these communities in their contexts with materials adapted to their language. Additionally, Outreach Teams employ or contract bi-lingual service ambassadors for SJJPA.
- Outreach Teams assist with media relations, utilizing their established relationships with local and regional media contacts to help schedule interviews, facilitate press conferences, and ensure that SJJPA press releases and media advisories are successfully delivered.
- Marketing partnerships are an important strategy to amplify brand reach, enhance market presence, and reach shared partner goals. SJJPA and the Outreach Teams engage target destination, travel, sports, and event partners to establish mutually beneficial relationships that promote the San Joaquins through partner advertising channels such as email, website, digital and printed ads, etc. To offset costs, a partnership toolkit with asset valuation has been developed to leverage SJJPA owned advertising channels for trade partnership marketing.

Rider Appreciation and Engagement

Rider retention is critical to the ongoing success of the San Joaquins. In a traditional marketing environment where there would be access to passenger information and data, unique offers and rewards could be leveraged with passengers to increase frequency of ridership or to recommend alternative destinations. With this information being owned by Amtrak, SJJPA has been able to develop an augmented approach at showing appreciation to riders and engaging with them. Throughout the year, station events and activities are planned to surprise and delight passengers with holiday or partner themed informational items and activities. SJJPA also collaborates with destination partners with incentives that highlight partner offerings and the accessibility from the service.

Market Research

To learn more about the onboard passenger experience for San Joaquins trains and Thruway Buses, as well as to gain insight in the key markets along the route, SJJPA conducts bi-annual passenger and market surveys. As this research is conducted every other year, there will be no onboard nor market surveys for FY 25/26.

10. ANNUAL FUNDING REQUIREMENT

The annual State budget includes a line item for the operating costs of the three State-supported intercity rail services. For each service, the State budget provides funding for intercity train operations, a marketing budget, minor capital projects, and the administrative staff budgets. The California Legislature approved the FY 2023/24 State budget that continues this support.

A primary purpose of this Business Plan is to request the annual funds required by SJJPA to operate, administer, and market the San Joaquins for agreed-upon service levels. This chapter documents ridership and revenue projections; FY 2023/24 financial numbers (actuals); operating, marketing, and administrative funding requests of SJJPA for FY 2025/26 to FY 2026/27. Also documented are operating cost analysis and cost savings due to management decisions and proposed uses for these funds per the Interagency Transfer Agreement (ITA) or otherwise as coordinated with the State. The FY 2025/26 plan identifies the various ongoing multi-year service and program initiatives for FY 2025/26 and those anticipated for FY 2026/27. See Table 10.4 for a summary of service and program initiatives.

The FY 2024/25 year has generated unprecedented momentum between SJJPA and the State to achieve a long-term financially sustainable service. Significant efforts have been made to right size the States investment for intercity passenger rail and thruway service through focused and achievable actions with full implementation in key areas for the FY 2025/26.

SJJPA acknowledges the limited financial capacity of the State and looks forward to working to ensure that any necessary budget constraints are applied to lower priority projects to adjust. In the event that projects cannot be fully funded at this time, SJJPA requests approval of the overall scope of work within the annual business plan, and the ability to adjust accordingly within projects. SJJPA looks forward to working with the State throughout the fiscal year as financial resources become available, or opportunities arise for funding to be adjusted between Other Operations Projects based on service needs. See Table 10.5 for the summary funding requests by major category.

State Ridership and Revenue Projections

San Joaquins has continued its growth pattern over the recent fiscal years. San Joaquins is forecasted to continue to grow through marketing activities, destination partnership expansion, and the reintroduction of the 7th round-trip.

Table 10.1

Ridership and Revenue Actuals and Forecasts (FY 2024 - FY 2026)				
Federal Fiscal Year (OCT – SEP)	Ridership	YoY % Change	Revenue	YoY % Change
FY 2024 (Actuals)	909,555	7%	\$31,160,828	4%
FY 2025 (Forecasted)	927,675	2%	\$31,718,229	1.8%
FY 2026 (Forecasted)	949,989	2%	\$32,219,864	1.6%
* SJJPA revenue forecast is lower due to the expected loss of Food & Beverage revenue. With the Venture Cars growing their percentage of fleet, the lack of Café Cars will lower the opportunity for Food and Beverage revenue. This will have a correlative decrease in on-board labor and associated costs within the Amtrak contract.				

FFY 2023/24 Operating Fiscal Report (Actuals)

The net operating costs (expenses less revenue) for Amtrak to operate the San Joaquins for FFY 2023/2024 was \$59,059,086 for 6 round trip service levels, which was satisfied with the allocation for the FFY 24. The other operating costs incurred outside of Amtrak contract for FY 24 were \$4,240,237 for maintenance of State-owned equipment, station leases, insurance, and host right of way maintenance projects.

FY 2023/24 Administrative Fiscal Report (Actuals)

The net administrative costs for SJJPA to manage and administer the San Joaquins for FY 2023/24 was \$4,125,568.

Operating Cost Analysis and Management Actions Resulting in Operating Cost Reductions/Revenue Enhancements

Per the ITA, SJJPA is currently planning to program any potential cost savings realized as a result of ongoing management actions to service improvements. Cost savings at this time have been from investment income, realignment of thruway service, revenue over annual budget, and other accumulated funds are being held for future operations payments or otherwise as coordinated with the State. A list of potential items that could utilize these cost savings is outlined below.

Potential Cost Savings Utilization

- California Passenger Information Display System (Cal PIDS) Upgrade – SJJPA portion of the project;
- New Station and Parking Improvements - Land acquisition and construction costs;
- Accessibility improvements to various San Joaquins stations;
- Contribute to the SJJPA's Operating Surplus account according to the Interagency Transfer Agreement;
- Costs associated with San Joaquins rebranding effort;
- Increase required Self-Insured requirements as required by Insurance Policy.

Operating Funding Request (FY 2025/26 and FY 2026/27)

The financial performance of the San Joaquins is dependent on several institutional arrangements. The most important arrangement is the contract with Amtrak to operate the service and maintain any assigned equipment and facilities.

San Joaquins operating expenses that fall under the Amtrak contract include:

- Full return to 7 round trip service, subject to equipment availability;
- Onboard labor;
- Railroad performance incentives;
- Train fuel and power;
- Property insurance for state-owned rolling stock operated (maintained by Amtrak);
- Liability insurance and indemnification;
- Lease of Amtrak equipment;
- Commissary and station costs;
- Terminal yard costs;
- Police presence;
- Support of Amtrak's regional and national supervision;
- Connecting bus service and other operating expenses.

The CTC allocated SJJPA \$49,984,806 in operating funding for FY 2024/25. This balance was utilized for the Amtrak contract. SJJPA was awarded \$4,515,000 for truck overhauls, direct passenger provisioning, insurance, stations lease obligations and other direct expenses. SJJPA was also awarded \$27,795,125 for maintenance of State-Owned Equipment that is accepted and in current revenue service. The funding request for FY 2025/26 is \$54,964,851 for 7 round trip service for the Amtrak contract, \$35,900,000 for State Owned Equipment in State supported revenue service, and \$7,461,200 for the non-Amtrak operational items (see Table 10.2). Any amounts above operational uses will be applied to approved projects prior to requesting reimbursement. For FY 2026/27 the San Joaquins projected funding request is \$56,613,797 for the Amtrak contract, \$37,695,000 for State-Owned Equipment deployed in revenue service and \$7,079,460 for non-Amtrak operational items.

Difference between the Amtrak State Payment Forecast and the Operations Budget

The Amtrak State Payment Forecast will not exceed the Approved Operations Budget.

Other Operations Funding Request (FY 2025/26 and FY 2026/27)

FY2025/26 affirms that increased day-to-day operational oversight improves the service in a way that directly speaks to passenger concerns. These relevant and strategic initiatives are meant to improve service performance, lower overall costs, and maximize current and future economies of scale. Priority focus areas that require other operations include evolving the food and beverage program to be an equitable experience across all equipment; transitioning maintenance of State-Owned equipment to a third-party with an unprecedented level of commitment to revenue service equipment that safeguards the passengers and employees. Efforts are underway to improving on time performance by working in close collaboration with host railroads and the train operator to address dispatching, turnaround, interference and overall train slot scheduling. Each of these operational components has taken time to move from a conceptual framework to full implementation and the funding provided by the State has facilitated impressive momentum. The comprehensive list of items included in Other Operations are below:

- **Station Leases and Facility Expenses** – As SJJPA takes a more active role in the oversight of the San Joaquins stations and facilities funds are required for station leases and other facility maintenance costs.
- **Contingent Railroad Liability Insurance Premiums** – SJJPA is responsible for Contingent Railroad Liability Insurance Premiums outside of the Amtrak contract and for State Owned Equipment (Ventures and Legacy) and these funds are required annually.
- **Passenger Services and Amenities Operations** – In an effort to introduce a program that creates an equitable experience on new and existing equipment; identify a pathway to reduce escalating program costs associated with the Café Car; and to improve overall passenger experience, SJJPA is taking a proactive and innovative lead in the evolution of its Food and Beverage program. These initiatives are being advanced by working directly with a local, third-party provisioner to contain operating costs; piloting out the vending solution on Venture Cars, which opens the possibility of expanding this model to legacy equipment benefitting all State-Owned equipment; and modifying the Venture vending cars to accommodate needed storage and kiosks to introduce on board sales. For more information on the Vending Solution and program overview see Chapter 8.
- **San Joaquins Rebranding** – Service rebranding for the Amtrak San Joaquins is a necessary next step in ensuring that the service can properly align with the vision of the State Rail Plan for a seamlessly integrated network. Additionally, this would remove restrictive barriers of having an Amtrak owned brand, and position SJJPA to have autonomous oversight of a service that is representative of the vast geographic region being serviced by its train and bus routes. For more information on the Service Rebranding see Chapter 9.
- **Host Railroad Right of Way Maintenance** – SJJPA continues to work directly with the Host Railroads to assess cleanup efforts along the corridor and safety and security activities aimed at reducing at-grade passenger interference. For more information on Safety and Security projects see Chapter 12.

- **State Owned Equipment Maintenance** – In 2024 SJJPA entered into an agreement with the State for the commissioning and annual maintenance of State-Owned Venture Cars based on its progressive placement into service. Beginning in March of 2025 SJJPA further transitioned mechanical oversight for the entire Northern California State Owned Equipment pool. This should result in long-term cost efficiencies and an improved condition of equipment under the Other Direct Operations allocation. Through this transition SJJPA and the States ultimate goal to improve equipment utilization will be realized as State Owned assets are maintained with the highest commitment to safety, federal regulations and industry best practice. For more information see Chapter 3.
- **Equipment Wreck Repair** – SJJPA is requesting other operations allocation for the Equipment Repair Fund for State-Owned revenue service equipment to continue to meet the future costs associated with a growing equipment pool and phased acceptance of multiple types of rolling stock.
- **State-Owned Rolling Stock Technology and VSS** – State-Owned Venture cars have a required cost for Video Surveillance System technology that historically flowed through the Operating Agreement with Amtrak for handling the video data for standard and/or emergency service calls to Stockton and/or Oakland for the video downloads/offloads from the Venture cars.
- **Zero Emission Multiple Units** – SJJPA is requesting \$5,000,000 over 4 years for additional resources necessary for mobilization activities related to the Caltrans ZEMU procurement. Since the ZEMUs will be utilized throughout California, SJJPA will submit a funding request via separate letter to Caltrans outside of SJJPA Annual Business Plan approval process.

Table 10.2

Other Operations - Detail (FY 2024/25 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
Station Leases and Facility Expenses	\$100,000	\$79,200	\$79,200
Contingent Railroad Liability Insurance Premiums	\$900,000	\$2,500,000	\$2,500,000
Service Rebranding	-	\$1,500,000	\$1,000,000
Passenger Services and Amenities Operations	\$100,000	\$2,340,000	\$2,457,000
Host Railroad Right of Way Maintenance	\$1,000,000	\$500,000	\$500,000
State Owned Equipment Maintenance	\$25,095,125	\$35,900,000	\$39,490,000
Equipment Wreck Repair	\$500,000	\$500,000	\$500,000
State Owned Rolling Stock Technology and VSS	\$100,000	\$42,000	\$43,260
Total Other Operations	\$27,795,125	\$43,361,200	\$44,774,460

Administrative Funding Request (FY 2024/25 and FY 2025/26)

Funds are required for the SJJPA to provide administrative functions for the San Joaquins. For FY 2025/26, SJJPA administrative costs are estimated at \$6,740,047. In 2024/25 SJJPA continued to deliver measurable progress in concentrating on organizational needs to meet the ever increasing responsibilities assumed under the ITA. Various initiatives and joint efforts between SJJPA and the State have evolved to account for the steady increase of within key areas of administration. SJJPA welcomes the increased role and responsibilities of administration and recognizes that financial resources must continue to yield tangible betterment for the service

and stabilize in future years. Key areas that continue to experience increased activity include contracts and procurement, grants, programming, legal and rail specific professional services, operational and passenger facing services. See Table 10.5 for a summary of these administrative costs alongside operations, marketing, service and program initiative costs. See Table 10.3 for a summary of budgeted administrative costs.

Table 10.3

Administrative Budget for the San Joaquins - Detail (FY 2023/24 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
Salaries/Benefits/Contract Help	\$4,335,610	\$4,620,670	\$4,759,290
Office Expenses/Postage/Memberships, etc.	\$49,335	\$54,810	\$55,906
Computer Systems	\$5,250	\$5,460	\$5,569
Communications	\$33,376	\$4,200	\$4,284
Motor Pool	\$34,300	\$18,753	\$19,128
Transportation/Travel	\$15,750	\$45,000	\$45,900
Training	\$5,402	\$9,917	\$10,115
Audits/Regulatory Reporting	\$45,750	\$47,580	\$48,531
Professional Services - Legislative	\$260,000	\$270,400	\$275,808
Professional Services - Legal	\$132,000	\$167,280	\$170,625
Professional Services - General	\$199,231	\$440,650	\$449,463
Software Integration & License Fees	\$33,000	\$5,000	\$5,100
Professional Services - Operations	\$121,939	\$125,000	\$127,500
Professional Services - Grants & Programming	\$145,000	\$254,800	\$259,896
Professional Services - Planning	\$330,000	\$120,000	\$122,400
Communications - Operations	\$15,105	\$15,105	\$15,407
Publication/Legal Notices	\$12,500	\$12,500	\$12,750
Maintenance of Headquarters	\$195,047	\$221,424	\$225,852
Insurance - Administration	\$87,725	\$91,983	\$93,822
Insurance - Railroad	\$66,275	\$78,449	\$80,017
Insurance Management Fees	\$8,250	\$10,000	\$10,200
Security Services/Safety Programs	\$94,697	\$121,066	\$123,487
Total Administration	\$6,225,542	\$6,740,047	\$6,874,843

Marketing Funding Request (FY 2024/25 and 2025/26)

SJJPA is requesting a yearly allocation of \$1,750,000, equivalent to what was requested last year, to facilitate marketing and advertising to the entirety of the San Joaquins corridor. This allocation will enable SJJPA's marketing and outreach program activities to keep pace with the rising inflationary costs that impact direct expenses such as paid media and digital advertising. This funding will also support the state-wide marketing strategies and tactics developed in collaboration with the State and the California Joint Powers Authorities to continue to grow ridership; enhance the passenger experience; advocate for local, state, and federal funding and rail policies; and to improve rail safety along our corridors. Additionally, as initiatives related to critical programs such as Valley Rail and zero emission locomotive conversions advance, there will need to be an expanded requirements for public relations and public outreach, which is accounted for in this funding request.

Minor Capital Funding Request (FY 2024/25 and FY 2025/26)

SJJPA is requesting \$500,000 per year provided for "Minor Capital" projects (projects valued at \$388,000 or less in total project cost) for FY 2025/26 and FY 2026/27. This amount is consistent with the approved amount in the FY 2024/25 annual business plan. In SJJPA's management of these funds, the "Minor Capital" program has been successful in keeping the San Joaquins Corridor in a state of good repair, as well as making small service improvements. In recent years, due to increases in construction and material costs, and inflation, funding has been insufficient to complete the generated project list, however a modest project list is still advancing.

SJJPA Service and Program Initiatives

In addition to direct current service costs, SJJPA, in coordination with Caltrans and CalSTA, are leading and coordinating on various efforts to improve the service in the near and long term. The FY 2025/26 funding request has been modestly reduced from the FY 2024/25 projected amount to achieve a financially sustainable and achievable program. Below are a list of current projects and funding requests:

- **Marketing Analysis** - To learn more about the onboard passenger experience for San Joaquins trains and Thruway Buses, as well as to gain insight into the key markets along the route, SJJPA conducts bi-annual passenger and market surveys. For more information see Chapter 9.
- **High-Speed Rail/Early Train Operator (ETO) Coordination Support** – SJJPA has several ongoing efforts with CHSRA and the ETO to accomplish its role and responsibilities as a party to the joint MOU and as a partner to the project. For more information see Chapter 4.
- **Program and Project Management Services for Capital Projects** - SJJPA has several ongoing capital projects that require specific assistance for track construction and related requirements between hosts, the FRA, and the various jurisdictions. Technical support will ensure timely project advancement. For more information on the various track projects see Chapters 4, and 5.
- **Madera Station High-Speed Rail CEQA/NEPA** – SJJPA is leading the Madera Station effort on behalf of the State and in coordination with CAHSR. For more information on project status see Chapters 4, and 5.
- **State Owned Rolling Stock Overhaul Work** – SJJPA and the State have entered into an agreement to address a backlog of truck overhauls and café car overhaul/upgrades at the Stockton Rail Maintenance Facility. For more information see Chapter 3.
- **Visalia to Hanford Connector (Kings/Tulare)** – SJJPA is providing leadership and support for the Cross Valley Corridor. This effort is in conjunction with the ETO's requirement to coordinate with connecting transit for High-Speed Rail. For more information see Chapters 4 and 13.
- **Zero Emission Multiple Unit Study for Central Valley Service (CVS)** – SJJPA is leading the feasibility study to use ZEMUs for the CVS.

Table 10.4

SJJP Service and Program Initiatives - Detail (FY 2024/25 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
Marketing Analysis	\$300,000	-	\$300,000
High Speed Rail/Early Train Operator Coordination Support	1,900,000	\$750,000	\$2,950,000
Project Management Support	\$500,000	\$500,000	500,000
Madera Station High Speed Rail CEQA/NEPA	1,000,000	\$500,000	500,000
State Owned Equipment Truck Overhaul	\$1,000,000	-	-
Visalia to Hanford Connector (Kings/Tulare)	\$115,000	\$75,000	\$75,000
Total SJJP Service and Program Initiatives	\$5,815,000	\$1,825,000	\$4,325,000

Table ES.1/10.5

SJJP State Funding Request for the San Joaquins (FY 2024/25 - FY 2026/27)			
Expense Category	FY 2024/25 (Approved)	FY 2025/26 (Requested)	FY 2026/27 (Projected)
Operating			
-Amtrak Contract	\$48,399,538	\$54,964,851	\$56,613,797
-Direct Operations and Mechanical	\$27,795,125	\$43,361,200	\$44,774,460
Administrative	\$6,225,542	\$6,740,047	\$6,874,843
Marketing	\$1,750,000	\$1,750,000	\$1,750,000
Minor Capital Program	\$500,000	\$500,000	\$500,000
SJJP Service and Program Initiatives	\$5,815,000	\$1,825,000	\$4,325,000
Total Request	\$90,485,205	\$109,141,098	\$114,838,100

11. SEPARATION OF FUNDING

As identified in the Joint Exercise of Powers Agreement (JEPA) for the SJJPA, the Controller of the Managing Agency of the SJJPA shall perform the functions of Auditor and Controller of the SJJPA, and the Treasurer of the Managing Agency of the SJJPA shall perform the functions of Treasurer of the SJJPA. SJJPA has selected SJRRC as the Managing Agency for the SJJPA during the term of the ITA. SJRRC utilizes the Auditor-Controller and the Treasurer of the County of San Joaquin. SJRRC has established the appropriate accounting and financial procedures to ensure that the funds appropriated and otherwise secured during FY 2025/26 and FY 2026/27 for SJJPA to support the San Joaquins are solely expended to operate, administer, and market the San Joaquins.

The ITA includes language confirming that the State shall perform audits and reviews of financial statements of the SJJPA with respect to the San Joaquins. In addition, per the Managing Agency Services Agreement between the SJJPA and the SJRRC, SJJPA will require an annual

independent audit of the accounts of SJJPA is performed (pursuant to Section 6506 of the Government Code) within six (6) months of the close of the applicable fiscal years.

The County of San Joaquin Auditor Controller and Treasurer are the official Auditor Controller and Treasurer of SJJPA. The County of San Joaquin maintains separate funds for all financial activities of SJJPA and provide monthly reports to SJJPA. Day-to-day accounting transactions are performed by the SJRRC Fiscal Department under the direction of the Controller and Director of Fiscal Services. The SJRRC/SJJPA Controller will provide for an annual independent audit of the accounts of SJJPA (pursuant to Section 6506 of the Government Code) within six (6) months of the close of the applicable fiscal years.

12. SAFETY AND SECURITY

SJJPA Safety and security are primary concerns that affect all activities associated with every phase of the service, including planning, design, construction and expansion, testing, operations, and maintenance of the rail system. All management and employees are responsible for ensuring the safety of passengers, themselves, property, and the public that encounter the system.

As the managing agency and administrator, SJJPA oversees the San Joaquins passenger rail service operating on the Union Pacific Railroad (UPRR) and the Burlington Northern Santa Fe Railroad (BNSF) owned territory. SJJPA contracts with Amtrak to provide onboard staffing (train and engine crews, cafe services), customer service, ticket agents, and the required management personnel to operate the San Joaquins. SJJPA, through its managing agency (SJJRC), will maintain the State-owned Venture car fleet as the vehicles are placed into revenue service. Amtrak's CFR 270 System Safety Plan (SSP) encompasses all elements mandated by the Federal Railroad Administration (FRA). It outlines explicitly that Element 6, the Maintenance, Repair, and Inspection Program, is designated under the ACE CFR 270 SSP. Amtrak, as the designated operator under contract with the San Joaquin Joint Powers Authority (SJJPA), carries out all operational responsibilities.

SJJPA collaborates with Amtrak, host railroads, and regulatory partners to identify and fully address safety concerns. As part of this collaboration, the focus is on:

- Vehicular and pedestrian safety at highway/rail grade crossings, including private crossings in rural areas of the San Joaquin Valley;
- Pedestrian safety along the railroad right-of-way;
- Security inside and around stations and at Thruway Bus stops;
- Passenger safety onboard trains and on Thruway Buses; and
- Emergency preparedness training and exercises with first responders in coordination with Amtrak, host railroads, state and federal regulatory agencies.

Components of the Program include:

- Requiring a robust communications protocol, including cooperation among all SJRRC managers, departments, employees and contractors relative to matters of safety and security;
- Continuous coordination with Amtrak, BNSF and UPRR;
- Pursuing an aggressive safety and security program of capital improvements; and
- Identifying relationships and responsibilities with local, state, and federal agencies that are responsible for and have governance over the San Joaquins Service, including the Federal Railroad Administration (FRA), National Transportation Safety Board (NTSB), California Public Utilities Commission (CPUC), and Transportation Security Administration (TSA).

SJJPA collaborates with Amtrak, host railroads, and regulatory partners to identify and fully address safety concerns. As part of this collaboration, SJJPA participates in:

- Corridor Improvement Team (CIT) meetings;
- Northern California Rail Safety Team activities;
- Partnership Performance Action Teams (PPAT);
- Regional Transit Strategies Working Group (RTSWG);
- Northern California Emergency Preparedness Task Force meetings; and
- Joint Terrorism Task Force meetings.
- Cybersecurity Task Force meetings
- Bay Area Urban Areas Security Initiative (UASI)
- San Joaquin Multi-Agency Homeless Strike Force Team

SJJPA will continue to work with Amtrak, BNSF and UPRR to identify safety and security issues, develop remediation strategies, and to secure grant funding to expand and enhance safety and security programs onboard all trains and Thruway buses, and along the railroad right-of-way.

Safety and Security Program for 2025/2026 and 2026/2027

The primary goals of the SJJPA's Safety and Security Program for the fiscal years 2025/26 and 2026/27 are twofold. First, the program aims to maintain a robust and comprehensive suite of educational initiatives designed to raise awareness and promote best practices in safety and security among all stakeholders. Second, it seeks to aggressively pursue capital improvement projects that will effectively address and eliminate unsafe conditions within the system. SJJPA is committed to creating a safer environment for passengers and staff through these efforts.

Safety and Security Educational Activities

SJJPA's educational efforts focus on increasing public awareness of rail safety and security along the San Joaquins Corridor. To increase awareness of the public, a wide range of populations and stakeholders will be targeted, including the existing base of employees, non-English speakers, agriculture and seasonal workers, school groups, community audiences, professional drivers, law enforcement officers, and emergency responders. To this end, SJJPA will continue to leverage a network of rail safety education resources through California Operation Lifesaver (CAOL) to inform communities about safe behavioral practices around the San Joaquins Rail Corridor.

Educating railroad personnel is as critical as raising public awareness. SJJPA will continue to take advantage of Department of Homeland Security (DHS) training resources and safety and security grant programs to build upon related activities already underway and to develop and implement new programs. Specific training efforts include but are not limited to the following:

- Emergency Preparedness Training for rail corridor first responders;
- Rail security awareness training for train crews, maintenance staff, bus operators, and station staff;
- Disaster simulations to ensure employee and first responder readiness; and
- Emergency Preparedness Training for passenger operations that connect to the San Joaquins.

Safety and Security Capital Improvements

An important aspect of safety and security are implementing physical improvements that will improve the safety and security of the Corridor and of train operations. In an effort to identify needed physical improvements, SJJPA will continue to conduct a systematic risk assessments of the conditions along the railroad right-of-way and in and around San Joaquins stations (including parking lots and platforms), as well as onboard trains. Important capital projects that SJJPA is currently implementing or currently pursuing include:

- As part of the comprehensive fencing upgrade initiative, the annual allocation request for 2025/26 will be specifically for phases 3 and 4 of the Fresno project and enhancements related to the Stockton Intermodal project.
- Inspections will be conducted bi-yearly at the beginning of the fiscal year using the Risk-Based Hazard Analysis and assessment Program.
- Risk assessments will be promptly conducted for any reported hazards or safety concerns. We will document mitigation efforts and share them with our partners for transparency and accountability.
- Fencing projects at locations identified based on incident hot spots and high numbers of near misses;
- Opportunities to improve pedestrian grade crossings and construction of pedestrian grade separations;
- On January 28, 2022, the SJJPA Board of Directors approved a-not-to-exceed \$1,000,000 agreement with BNSF to install fencing to deter trespassers from accessing the railroad right-of-way. BNSF has installed nearly one mile of fencing, with an additional mile slated for installation over the next year;

- Increased lighting at stations, and parking lots; and
- Improved safety and security-related signage, including messaging around suicide prevention and railroad safety.

A critical capital improvement being implemented is Positive Train Control (PTC), which is an advanced railroad communication system, consisting of signaling and other equipment along tracks as well as on-board trains. PTC increases the operational safety of passenger trains (and freight trains) by preventing the following:

- Train-to-train collisions;
- Over-speed derailments;
- Incursions into established work zone limits; and
- Movement of a train through a main line switch in the improper position.

Other activities SJJPA will employ to improve safety and security include:

- Attending listening sessions with station personnel to help identify safety/security concerns and suggestions for improvements/solutions;
- Embracing the Transportation Security Administration's (TSA) offer to conduct threat / vulnerability assessments and station security profiles;
- Work with host railroads to ensure the corridor is kept clear of homeless encampments, and other unauthorized activities.
- Conduct thorough risk assessments along the right of way, at stations, and within facilities to identify and address safety and security issues. Partner with local teams to effectively mitigate encampment trespassing.
- Continue to engage in detailed discussions and collaborative efforts with the Amtrak Western Commander and Inspector to enhance safety protocols and implement adequate security measures.

13. STATION AREA DEVELOPMENT AND CONNECTIVITY

Numerous benefits can be realized when encouraging increased development densities near San Joaquins stations and improving connectivity with other modes of transportation. In addition to potential benefits from minimizing land consumption associated with new growth/greenfield development, increased densities and residential development near San Joaquins stations concentrates activity to be conveniently located near these transportation amenities. This promotes increased use of the San Joaquins, generating additional ridership and revenue to benefit the State. It also accommodates new growth on a smaller footprint, benefiting the local jurisdiction from a business tax, mobility & access improvement, and essential service perspective. A dense development pattern can also better support a comprehensive and extensive local transit and shuttle system, bicycle and pedestrian paths, and related amenities that can serve these communities. Local governments will determine which mechanisms best suit each community and which specific efforts could be implemented to improve connectivity and promote station area development.

Applying transit-oriented development (TOD) measures around rail stations is a strategy that not only works for large, dense urban areas, but also downtowns of smaller cities and suburban areas. Local governments play a significant role in implementing station area development by adopting plans, policies, zoning provisions, and incentives for higher densities, and by approving a mix of urban land uses. TOD measures are typically applied to areas within about one-half mile of stations.

Connectivity with modes other than the automobile is particularly important for first and last-mile trips and to promote equitable transportation to serve disadvantaged/priority communities throughout California. In addition to helping increase ridership, improved transit and micro-transit connections support a more sustainable California by reducing automobile VMT, energy consumption, and greenhouse gas emissions.

Implementation Strategies for TOD at San Joaquins Stations

While the responsibility and authority needed to focus growth and station area development near San Joaquins stations reside primarily with local government, SJJPA can help ensure that the San Joaquins become an instrument for encouraging implementation of station area development principles the in following ways:

- Encourage local governments to prepare/update and adopt station area plans, amend city and county general plans, and promote TOD in the vicinity of San Joaquins stations.
- Assist local governments and developers in securing grants/funding for planning and implementing TOD around San Joaquins stations.
- Work with communities and organizations to support TOD and with developers to implement TOD.
- Require new San Joaquins stations be developed as a multi-modal transportation hubs.
- Encourage the location of potential new San Joaquins stations in traditional city centers and/or areas with high potential for TOD.
- Encourage planning consistent with SB 375 (Sustainable Communities Strategy), transit priority areas, infill development, and TOD.
- Prepare station areas for potential changes in first- and last-mile access including the growth of micro-mobility, and shared, connected, electric, and automated vehicles.
- Encourage transit agencies and cities to align with policies that enhance connectivity to transit, consistent with many regional plans found in the San Joaquins service area.

Transit Oriented Development Around San Joaquins Stations

The San Joaquins serves 18 rail stations, most of which are multi-modal transportation hubs located in traditional city centers. Table 13.1 presents the existing amenities and services at San Joaquin stations, as well as a preliminary assessment of their potential for new TOD. TOD opportunities are considered low at San Joaquins

stations that are located in outlying areas away from the city centers/downtowns. The highest potential for new TOD at San Joaquins stations is likely to be in the larger cities along the corridor. To encourage TOD, SJJPA is working to improve the usability of stations and Thruway Bus stops. Comprehensive assessments have begun with the objective to update and improve signage at and near stations and stops to enhance the experience of riders, with new signage and bus stop locations being recently upgraded and implemented respectively.

There are several large TODs that have developed or are being developed in the vicinity of San Joaquins stations or planned new stations. There are also opportunities to encourage TOD at several other stations. In addition to encouraging TOD, SJJPA is working with local and regional governments to improve transit connectivity at the stations described below, along with other stations.

Sacramento TOD

SJJPA's plans for four new stations in Sacramento provide a great opportunity to not only leverage TOD that is already underway (especially around the planned Midtown Station), but to encourage TOD near new San Joaquins/ACE rail station locations. In addition to Midtown, Old North Sacramento, and City College hold promise for TOD in the immediate vicinity of the planned station sites. Near the Midtown Station, the San Joaquin Regional Rail Commission (SJRRRC) in 2021, partnered with the Capitol Area Development Authority and EAH Housing on two affordable housing development projects in competing for funding from the Affordable Housing and Sustainable Communities (AHSC) Program. EAH Housing's On Broadway 140-unit affordable housing project was awarded a \$29 million AHSC grant on January 26, 2022. The On Broadway project will be located on Broadway, less than a mile from Midtown Station. The AHSC grant has \$10 million for transportation improvements that includes street improvements, \$6.1 million for two new ACE railcars, and \$1.9 million for improvements to Midtown Station. SJJPA worked with a developer on a successful 2023 AHSC grant for a 124-unit affordable housing project in the vicinity of the future Old North Sacramento Station (440 Arden Way) which included \$6 million to convert an ACE locomotive to have zero-emissions. In 2024, SJJPA worked with developers on another successful AHSC grant for an affordable housing project named Sakura. This project, located near the Midtown Station (2000 16th Street), will provide \$5 million in funding for a ZEMU car and \$2 million for Midtown Station. SJRRRC and SJJPA will continue to seek other future affordable housing developments to partner on providing TOD near future Valley Rail stations.

In 2023, SACOG was awarded a Caltrans Sustainable Transportation Planning Grant, with SJRRRC and SJJPA as sub-recipients, and in partnership with the City of Sacramento and Sac RT. This grant will fund an action planning effort in the area that includes the Old North Sacramento Station and two Sacramento light rail stations along Del Paso Boulevard. This work will begin in earnest in mid-2025 with initial outreach to the immediate community around the station area and various stakeholders near the Old North Sacramento Station site. This action plan will focus on immediate steps to enhance safety and security near the station, address multi-modal infrastructure needs to increase connectivity of the neighborhood and to the nearby Globe Light Rail Station, and encourage new TOD.

Immediately north of the existing Sacramento Valley Station, which San Joaquins trains currently share with Capitol Corridor trains, the 244-acre mixed-use TOD called The Railyards is currently being developed as an entirely new urban district of Sacramento. Plans call for a mix of housing types, a large retail component of over one million square feet, a significant level of office space at 2.3 million square feet, along with other uses such as a hotel, recreational, and cultural land uses. SJJPA supports The Railyards development as a way to activate the environment surrounding the station and believes it will engender additional rail and transit ridership.

Stockton ACE Station (Cabral Station) TOD

The Robert J. Cabral Station (Cabral Station), serves as the Downtown Stockton Station for the San Joaquins. This station serves all San Joaquins trains to/from Sacramento. The City of Stockton has expressed interest in highlighting the rail connections available at the station. SJJPA is very supportive of the City's efforts to encourage development in downtown Stockton as it will not only improve connectivity and walkability to the station, but will greatly improve the surrounding neighborhood, likely leading to ridership increases on the San

Joaquins. In support of furthering development around the station, SJRRC received a grant in the amount of \$2 million for a streetscape improvement project along East Channel Street, which directly connects the Cabral Station to new developments and greater downtown, as well as San Joaquin Regional Transit District's Downtown Transit Center, and is expected to begin construction in 2024. In early 2023, the City of Stockton partnered with the SJRRC, SJJPA, San Joaquin COG, and SJ RTD on a Strategic Partnership – Transit planning grant from Caltrans for TOD in downtown Stockton which will include Cabral Station and the Stockton Transit Center. San Joaquin COG submitted the application, which will be led by the City of Stockton if successful. In late 2024, Caltrans awarded this grant and also requested the planning area to include the San Joaquin Street Station that the San Joaquins also serves for the Oakland-Bakersfield service.

In 2019, SJRRC partnered with Visionary Home Builders and the City of Stockton on their Grand View Village affordable housing development, located 0.50 miles west of Cabral Station. The development was awarded \$17.9 million of funding from the AHSC program, including \$4 million to purchase an additional ACE rail car and \$202,000 for improvements to East Channel Street. The Grand View Village project opened for residents in spring 2024.

In 2021, SJRRC partnered with Service First of California on a successful AHSC application for the Hunter House Project (awarded January 26, 2022). The Hunter House project will be located on the 600 block of North Hunter Street about 0.8 miles from Cabral Station and about 1 mile from San Joaquin Street Station. This 120-unit affordable multifamily housing project for special needs populations will be four stories with a mix of one - and two - bedroom apartments and an underground garage. The \$27 million AHSC grant award has \$9.4 million for transportation improvements that includes street improvements, \$2.5 million for a new ACE railcar, and \$1.35 million for improvements to Cabral and San Joaquin Street stations.

Richmond TOD

The Richmond Station is located in the heart of the city and is a shared facility with BART. On the west side of the BART/Amtrak Station complex, a previously developed TOD spans nearly three city blocks and includes many hundreds of residential units and small retail shops that greet people entering/exiting the station complex. Additionally, other TODs are proposed at the east entrance/exit of the station complex. Additionally, there is a large bus depot at the station, providing excellent connectivity. Richmond is a good case study in TOD for the San Joaquins as it is one of the most developed in the system.

Madera TOD

SJJPA worked with the Madera County Transportation Commission and the City of Madera and County of Madera to find an improved location for a relocated Madera Station. The existing station near the Madera Acres community has limited use, no transit connections, poor access to SR-99, and its location is expected to see only marginal growth in employment and transportation demand.

A relocated Madera station is being implemented by SJJPA at a location just north of the new Avenue 12 High-Speed Rail grade separation as the first phase of the Madera HSR Station to be implemented by SJJPA. Avenue 12 is a primary transit corridor for Madera County and has a direct connection to SR-99. The relocated station north of Avenue 12 will be consistent with the growth of Madera west of the BNSF line; provides the opportunity for TOD in the station vicinity; and will be closer to Madera Community College.

To support this relocated San Joaquins Station and future High-Speed Rail service, SJJPA assisted and supported Madera County and the City of Madera on a successful 2021 Caltrans Sustainable Transportation application. This grant is funding an update to an existing specific planning area to modernize and better orient proposed land uses towards transit-oriented development. This work is crucial as the rail station and services were not contemplated when the plan was originally adopted in the early 1990s in addition to the Madera Community College campus being built. This planning work began in 2023 and SJJPA expects to be a key stakeholder in the updated specific plan's development, adoption, and implementation.

Fresno TOD

While most TOD planning is focused on the immediate vicinity of the future HSR station in Fresno, which lies just under a mile to the west of the San Joaquins Station, SJJPA sees a great opportunity to encourage further development of downtown Fresno between the two stations. Many new developments have already been built or are in the planning phase, with several multi-family housing developments recently being completed or underway within walking distance of the station. SJJPA will continue to support further TOD development in downtown Fresno to support both the San Joaquins and future High-Speed Rail services, in addition to rail planning efforts just getting underway to study both regional rail and light rail services in the County and City respectively.

Oakley TOD

SJJPA has been coordinating with the City of Oakley to implement a San Joaquins station for several years. The SJJPA/SJRRC 2018 TIRCP award included the construction of the station platform and track, requiring SJJPA to coordinate with the City of Oakley, Amtrak, and BNSF Railways. The platform design phase began in 2021, and construction is slated to begin for the Oakley Station Platform Project in late 2024. The City of Oakley has completed the new park and ride lot adjacent to the station. With high-levels of growth taking place in eastern Contra Costa County, it is anticipated the new San Joaquins station will encourage TOD in the vicinity.

Bakersfield TOD

The Bakersfield Amtrak station is very accessible and is adjacent to the heart of downtown. The station is within walking distance to hotels, the convention center and arena, many government office buildings, the county library, the city's ice and aquatic centers, a movie theater, Mill Creek Linear and Central Parks, and numerous affordable and market-rate housing options. This location offers continued opportunities for the station to catalyze transit-oriented development and land uses supportive of the San Joaquins. These uses and the further development of downtown will also encourage similar development near the future High-Speed Rail Station on the north side of downtown.



13.1

Station	Station Ownership	Existing Amenities/Transit Connectivity	Within City Center	New TOD Potential
Sacramento	City of Sacramento	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, ATM, 165 overnight parking spaces, Amtrak Thruway Bus, Local/Regional Bus Services and Light Rail	Yes	High
Lodi	City of Lodi	Enclosed waiting room, ticket machine, phone, 380 parking spaces, Amtrak Thruway Bus, Local/Regional Bus Services	Yes	Medium
Stockton-ACE (Cabral)	SJRRRC	Enclosed waiting room, ticket machine, phone, 185 parking spaces, Amtrak Thruway Bus, ACE Commuter Rail & Local/Regional Bus Service	Yes	High
Oakland-Jack London Square	Port of Oakland	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, ATM, 500 short-term and 500 long-term parking spaces, Amtrak Thruway Bus, Local/Regional Bus Services, Ferry	Yes	High
Emeryville	City of Emeryville	Enclosed waiting room, ticket office and machine, restrooms, ATM, 125 shared parking spaces, Amtrak Thruway Bus, Local/Regional Buses	Yes	High
Richmond	Union Pacific	Platform with shelter, ticket machine, phone, 400 shared parking spaces, Local/Regional Bus Services, BART	Yes	High
Martinez	City of Martinez	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 370 parking spaces, Amtrak Thruway Bus, Local/Regional Bus Services	Yes	Medium
Stockton-Amtrak (San Joaquin St.)	BNSF	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 24 parking spaces	No	Low
Modesto	City of Modesto	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 187 parking spaces, Local/Regional Bus Service	No	Low
Turlock/Denair	BNSF/Amtrak	Platform with shelter, ticket machine, 45 parking spaces, Local On-Demand Pilot	No	Low
Merced	State of California	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 46 parking spaces, Amtrak Thruway Bus, Local/Regional Bus Service	Yes	Medium
Madera	Madera County	Platform only, ticket machine, restrooms, 19 parking spaces, Dial-a-Ride	No	Low
Fresno	City of Fresno	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 169 parking spaces, Bus Service	Yes	High
Hanford	City of Hanford/BNSF	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, 47 parking spaces, Amtrak Thruway Bus, Local/Regional Bus Service	Yes	Medium
Corcoran	City of Corcoran	Enclosed waiting room, ticket machine, restrooms, phone, 90 parking spaces, Local/Regional Bus Services	Yes	Medium
Wasco	City of Wasco	Platform with shelter, ticket machine, 35 parking spaces, Bus Services	Yes	Medium
Bakersfield	City of Bakersfield	Enclosed waiting room, ticket office, ticket machine, restrooms, phone, ATM, 347 parking spaces, Amtrak Thruway Bus Services, Bus Services	Yes	High

Connectivity to San Joaquins Stations

The responsibility for providing connectivity to San Joaquins stations resides primarily with local and regional transit agencies. SJJPA coordinates with existing transit services and encourages local and regional transit agencies to improve and expand transit services that connect to San Joaquins stations. SJJPA is also requesting that transit agencies promote their connection to the San Joaquins onboard their transit services, at their stops/stations, and through their respective websites. SJJPA is working to improve the coordination of fares and service schedules with connecting transit services and will seek funding opportunities to Implement transit-transfer programs for San Joaquins passengers. In partnership with local and regional agencies, SJJPA is pursuing Caltrans Sustainable Planning grants in 2025 and 2026 to study increased connectivity at San Joaquins stations focusing on improving service to underserved disadvantaged/priority populations. This planning would include studying new technologies and creative ways to improve service connectivity to disadvantage/priority populations throughout the San Joaquins corridor.

Hanford, Corcoran and Wasco Connectivity

In 2021, SJJPA completed and published the “South of Merced Integration Study”. This work focused investigation on how best to provide continued connectivity to downtown Hanford, Corcoran, and Wasco once the High-Speed Rail Early Operating Segment begins operation (and Merced becomes the San Joaquins southern terminus). SJJPA coordinated closely with local and regional partner agencies on this study. As a result of this effort, SJJPA has entered into an MOU with Kings CAG, Kings County Area Public Transit Agency (KCAPTA), Tulare CAG, Tulare County Region Transit Agency, and Visalia Transit to partner in the development of the Cross-Valley Corridor Phase 1 Bus Service and the planning and implementation of the Cross-Valley Rail Project. SJJPA and other Kings-Tulare local/regional agencies partnered with Tulare County Regional Transit Agency (TCRTA) on their successful \$33.8 million 2022 TIRCP application for electric buses and shuttles for the Cross-Valley Corridor that will initially enhance connections with the San Joaquins (until HSR operations begin). SJJPA is also committed to working with KCAPTA and Visalia Transit to seek state funds to provide increased local/regional transit connectivity for the San Joaquins between Hanford and Visalia to augment and support the Phase 1 bus service. This additional service is expected to show the viability of enhanced transit operations along the Cross Valley Corridor in anticipation of planning and implementation of future rail service that will connect from Hanford to Porterville via the Kings/Tulare High Speed Rail station. In the summer of 2024 through a local transit partnership, the Kings Area Regional Transit Agency (KART) implemented a connecting transit service between Hanford and Visalia, with support from SJJPA and approved through the Annual Business Plan. SJJPA intends to continue this support with \$75,000 request to continue this timed connection to the San Joaquins. This service is anticipated to be supplemented in the future with environmental mitigation funds specified in the EIR completed by Caltrans District 6 for State Route 99 improvements.

In 2023, SJJPA also partnered with the City of Hanford, Kings CAG, Tulare CAG, Fresno CAG, Kings County Area Public Transit Authority (KCAPTA), TCRTA, and CHSRA on a Caltrans Sustainable Communities Planning grant for Kings/Tulare HSR station area TOD and connectivity planning and Cross Valley Rail (Porterville – Hanford) planning. The City of Hanford is the lead agency for this grant application and project manager for the planning effort where SJJPA will play a key stakeholder role to lead the rail service planning effort for the Cross Valley Corridor. Tulare CAG was also awarded \$59.1 million to initiate the first phase of Cross Valley Corridor bus service that will run from Lemoore in Kings County to Lindsay in Tulare County. Lastly, SJJPA also approved an MOU with Kern Transit to work in partnership to provide increased Kern Transit connectivity between Wasco and the future Bakersfield HSR Station once HSR Interim Service begins operations.

Network Integration Connectivity Study

In 2021, SJJPA undertook a connectivity study focused on the San Joaquin Valley stations and service to disadvantaged communities. This effort included the development of a GIS tool which shows transit routes which provide connectivity to each San Joaquins station, population density, and disadvantaged communities as defined by CalEnviroScreen. Findings of this effort were presented to the SJJPA at the July 22, 2022, Board Meeting and

the report was released July 2022. This work is helping the SJJPA focus on strategies and partnerships with local and regional providers to improve connectivity to San Joaquins stations.

In 2024, SJJPA was awarded a Caltrans Sustainable Transportation Planning Grant for rail and transit network integration work in the San Joaquin Valley and help develop an action plan to support passenger rail, transit, and TOD. This effort will be led by SJJPA in coordination with a working group made up of staff from the 8 San Joaquin Valley Regional Transportation Planning Agencies (RTPAs), and representing the San Joaquin Valley Regional Policy Council. In addition to network integration, this effort will create a valley-wide narrative of the State's investment in rail and transit, highlighting the numerous local and regional services, their important connections to the San Joaquins and future High-Speed Rail, and how current and future transit-supportive land uses help further the State's climate goals while building economically resilient communities that are less car-dependent. The action plan is envisioned to be both a messaging tool and provide guidance to implement positive change in the built environment for stakeholders at all levels.