



San Joaquin
Joint Powers Authority

PUBLIC REVIEW DRAFT

SAN JOAQUIN JOINT POWERS AUTHORITY

2026 BUSINESS PLAN UPDATE



**PREPARED FOR CALIFORNIA STATE TRANSPORTATION AGENCY
UPDATED FOR FY 26/27 AND FY 27/28**



EXECUTIVE SUMMARY

The San Joaquin Joint Powers Authority (SJJPA) Annual Business Plan (Business Plan) outlines the agency's priorities, strategies, and funding needs for State Fiscal Years (SFY) 2027 and 2028 as SJJPA continues to manage, operate, and advance the Gold Runner intercity passenger rail service. The Business Plan reflects a period of transition—one focused on stabilizing performance, transitioning maintenance responsibilities, improving reliability and passenger experience, delivering major capital investments, and positioning the service for long-term growth and integration with California's expanding statewide rail network.

Gold Runner's 365-mile rail route is the State's longest and most diverse intercity rail corridor, serving urban, suburban, rural, and disadvantaged communities. The Gold Runner service includes a thruway bus network that stretches throughout California and into Nevada, providing vital connections to communities and regions across the west.

This Business Plan seeks to optimize available funding and infrastructure while maintaining and growing high standards of safety, service quality, and reliability. The Business Plan also includes strategic initiatives to significantly expand and improve passenger experience, service levels, and regional connectivity through an ambitious capital infrastructure and investment program.

Below summarizes key elements of the San Joaquin Joint Powers Authority 2027/2028 Annual Business Plan:

Operating Plan and Strategies

The Business Plan includes providing seven daily round-trips, supported by a pulsed schedule designed to improve connectivity and manage freight rail conflicts. This level of service maintains pre-pandemic levels, representing the first full fiscal year the Gold Runner will operate equivalent to those prior to 2020. Improving on-time performance remains a top priority, and the agency will continue close coordination with Amtrak, host railroads, and state partners through structured performance reviews, capital coordination meetings, and schedule refinements.

The Gold Runner Thruway Bus Program remains a core component of the service, extending connectivity to major destinations, rural regions, and transit hubs throughout California. In FY 2026/27, SJJPA will continue to optimize the Thruway network through targeted route adjustments, expanded bus-only ticketing, partnership development, and performance-based evaluations, ensuring the program supports both ridership growth and cost effectiveness.

Passenger Experience and Marketing

Enhancing the passenger experience is another focus for the coming year. Planned initiatives include improved passenger information systems, upgraded Wi-Fi, expanded food and beverage options, and phase one introduction of Business Class. These

efforts are intended to improve customer satisfaction, attract new riders, and support incremental revenue growth while maintaining affordability.

Marketing, public relations, and community engagement continue to play an essential role in supporting ridership recovery, service awareness, and stakeholder trust. SJJPA will maintain a strong presence throughout the corridor, engage proactively with elected officials and community partners, and leverage data-driven marketing strategies to support both near-term ridership goals and long-term service expansion.

Capital Program

SJJPA and its managing agency, the San Joaquin Regional Rail Commission (SJRRRC), are delivering a robust program of capital projects to enhance and expand the Gold Runner Service. A central focus of FY 2026/27 is advancing service reliability and infrastructure delivery. Through a phased approach to the Valley Rail Program, SJJPA is prioritizing near-term projects that improve operational flexibility, expand service, and support future growth. Major capital efforts—including Oakley Station, Madera Station Relocation, CP Lake-to-CP West Escalon, San Joaquin Street Layover planning, and platform accessibility improvements—are designed to improve on-time performance, enhance safety, and create the foundation needed for additional service frequencies in future years.

Equipment and Maintenance

SJJPA has assumed an expanded role in statewide rail fleet management. The transition of Northern California intercity rolling stock maintenance responsibilities marks a significant shift for the agency, requiring a prioritization to return equipment to a state of good repair, expand fleet availability, and control costs through efficiencies. Through coordinated lifecycle preventive maintenance, legacy fleet overhaul planning, and Venture car deployment, SJJPA is working with Caltrans and partner Joint Powers Authorities to stabilize the fleet, improve reliability, and support future service expansion across all state-supported corridors.

Station Area Development and Connectivity

The Business Plan reflects SJJPA's continued efforts to focus on advancing targeted station area development planning, improving first- and last-mile connections, and coordination with local, regional, and state partners. This work includes alignment with the California High-Speed Rail Authority's Merced-Bakersfield Early Operating Segment. Ongoing coordination related to service planning, infrastructure, ticketing, and operations will position Gold Runner as a critical feeder network for high-speed rail and ensure a seamless transition to a more integrated statewide passenger rail system.

Uniform Performance Standards

SJJPA continues to work in partnership with Caltrans to apply the State's Uniform Performance Standards (UPS) framework in a manner that advances transparency and accountability. While the service continues to face structural challenges in meeting the UPS related to corridor length, freight rail congestion, and market diversity, SJJPA remains committed to delivering an affordable, accessible, and reliable service that balances equity, performance, and fiscal responsibility.

This Business Plan reflects an effort to balance by pairing realistic performance expectations with targeted strategies to improve outcomes over time. To better account for corridor characteristics, demographics, and service commitments the Business Plan metrics include Individual Performance Adjustments (IPA). These adjustments augment the UPS and allow for a more focused assessment of performance while still driving accountability and continuous improvement.

Annual Funding Requirement

SJJPA is committed to delivering the greatest possible level of intercity rail services within available funding levels, while maintaining high safety, service quality and reliability standards. The Annual Funding Request included within the Business Plan is designed to achieve those goals, while recognizing the structural funding constraints for intercity rail within the State Budget. As such, most expense categories have remained the same or consistent with SFY 2025/2026 levels.

The Business Plan includes an Operating Budget request of \$45,701,733 for Amtrak Operations, \$41,045,000 for direct operations

for maintenance of equipment used in intercity service, and \$14,292,899 for other direct activities outlined in the Annual Funding Requirement section. This represents a nominal increase of approximately \$2.7M (under 3% YoY) from the prior year request due primarily to maintenance cost associated with an increase in the size of the State-controlled fleet. The request for Administration, Marketing, Minor Capital, and Service and Program Initiatives total \$12,013,403. Administrative, Marketing, and Minor Capital Budgets are unchanged from the prior year's request.

The strategies and investments outlined in this Business Plan demonstrate SJJPA's commitment to responsible stewardship of public funds, measurable performance improvement, and the delivery of a passenger rail service that supports mobility, equity, economic vitality, and statewide connectivity.

SJJPA State Funding Request		
Expense Category	FY26/27 (Requested)	FY27/28 (Projected)
Operating		
Amtrak Contract	\$45,701,733	\$47,072,785
Operations State Controlled Equipment	\$41,045,000	\$41,045,000
Other Operations	\$14,292,899	\$14,473,257
Administrative	\$6,740,047	\$6,740,047
Marketing	\$1,750,000	\$1,750,000
Minor Capital Program	\$500,000	\$500,000
SJJPA Service and Program Initiatives	\$3,023,356	\$2,792,290
Total Request	\$113,053,035	\$114,373,379

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INTRODUCTION

The purpose of this 2026 Business Plan (“Business Plan”) is to identify the San Joaquin Joint Powers Authority’s (SJJPA) intentions for State Fiscal Year (SFY) 2027 and FY 2028 in its management of the Gold Runner Intercity Passenger Rail Service (Gold Runner), and to request the annual funds required by SJJPA for the Gold Runner. 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 CalSTA and used to develop an annual appropriation request for the State Legislature.

Management of the Gold Runner service by SJJPA was initiated through an Interagency Transfer Agreement (ITA) with the California Department of Transportation (Caltrans). The ITA is a living document that memorializes the roles, responsibilities, scope, and constraints between Caltrans and SJJPA. The ITA’s administrative authority is key to actively addressing emerging opportunities and implementing appropriate strategies. The agreement is critical to long-term success and requires both collaboration and continual maintenance to memorialize allowable costs and activities.

The Gold Runner service extends 365 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 Gold Runner route is 315 miles long and has 13 intermediate stops. The Gold Runner route is 49 miles between Sacramento and Stockton with one additional intermediate stop. Gold Runner service includes an extensive network of dedicated Thruway Buses connecting with the Gold Runner to and from destinations throughout California and into Nevada is critical to the performance of the overall service.



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 Gold Runner. To protect the existing service and to promote its improvement, local and regional agencies throughout most of the Gold Runner corridor sponsored and supported Assembly Bill 1779 (AB 1779). This bill enabled regional government agencies to form SJJPA to take over the administration and management of the Gold Runner 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. SJJPA became the managing agency of the Gold Runner on July 1, 2015.

The SJJPA Governing Board includes elected representatives of ten Member Agencies:



The State shares operating responsibility for the Gold Runner with SJJPA. Under the provisions of AB 1779, the State continues to provide the funding necessary for service operations, administration, and marketing. Furthermore, Caltrans is responsible for the development of the California State Rail Plan; coordination and integration between the three state-supported intercity passenger rail services; and the development of state budget requests. The State also remains the owner of the trainsets used for the Gold Runner 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 Gold Runner.

Public outreach of the draft 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. Gold Runner train and connecting Thruway Bus services are developed with input from riders and other public interests, private sector interests, and the various transportation agencies and communities that help deliver and are served by the Gold Runner.



OPERATING PLAN AND STRATEGIES

SJJPA is pursuing service optimization and expansion for the Gold Runner to meet growing demand and improve connectivity. This growth is designed to meet the needs of current passengers and to attract new riders to the system. The expansion also positions SJJPA and the Gold Runner service to integrate with future high-speed rail (HSR) in the San Joaquin Valley, playing a key role in connecting riders to the new service.

FY25/26 and FY26/27 Operating Plan

The Gold Runner operating plan for the upcoming fiscal year is centered on delivering seven daily round-trips supported by a reliable, repeatable schedule that aligns with statewide intercity rail best practices. Service will continue to operate on a pulsed schedule framework, with targeted adjustments to account for known freight conflicts and strategically distributed pad time to improve on-time performance (OTP) and strengthen timed connections with the Thruway bus network.

Under this service plan, Gold Runner will provide five daily round-trips between Bakersfield and Oakland and two daily round-trips between Bakersfield and Sacramento. This operating pattern maximizes market coverage while maintaining schedule consistency and operational efficiency, supporting both ridership growth and dependable statewide connectivity.

Rail Operating Strategies

During FY26/27, SJJPA will work closely with Amtrak, host railroads, Caltrans, and regional partners to improve service reliability, operational coordination, and cost effectiveness.

Key efforts will focus on refining the pulse schedule following the restoration of the seventh round-trip, coordinating with host railroads on dispatcher training and scheduled train meets, and identifying targeted capital and system improvements that can measurably improve reliability. SJJPA will also evaluate schedule adjustments to enhance ridership potential while maintaining fiscal discipline, and will continue participating in quarterly capital coordination meetings with BNSF and UPRR.

In parallel, SJJPA will advance service coordination with peer corridor agencies, including CCJPA and LOSSAN, to improve passenger connections.

On-Time Performance Improvement Initiatives

Improving OTP remains a priority focus for FY26/27, particularly following the December 2025 restoration of the seventh daily round-trip. SJJPA will lead a set of structured, recurring performance management actions with operating partners to stabilize and improve service reliability. These actions include quarterly joint operational reviews with BNSF and Amtrak to assess train meet performance under the current schedule and recommend targeted adjustments, as well as monthly performance meetings with Amtrak to analyze delay drivers, quantify impacts, prioritize corrective actions, and track progress through regular reporting to SJJPA leadership.

Additionally, SJJPA will continue working with Amtrak and TransitAmerica Services, Inc. (TASI) to address equipment reliability issues affecting the Northern California fleet. This effort will focus on diagnostics, remediation, and

accountability with the goal of achieving measurable reductions in equipment-related delays during FY26/27, supporting more consistent service delivery and improved passenger experience.

Thruway Bus Expansion and Optimization

Thruway Route Expansion

The Gold Runner Thruway Bus Program is a core component of Gold Runner operations, extending rail connectivity to major transit hubs, key destinations (e.g., Yosemite, Bay Area, Southern California), and rural communities. It offers coordinated schedules, integrated ticketing, reliable timed-transfers, and corridor-wide travel options to enhance systemwide connectivity and support ridership growth.

Since the enactment of SB 742, SJJPA has implemented bus-only ticketing on seven routes—Routes 1C, 3 (north of Sacramento), 7, 10, 18, 19, and 40, the newest route (Merced–Los Banos–Gilroy–San José). These corridors were prioritized for shared-use operations due to their rural/interregional mix and limited alternatives. Mixed passenger use has improved load factors, increased fare revenue, advanced environmental and equity goals, and complemented local/regional transit, aligning with SB 742's intent. In 2026, SJJPA intends to open Route 6 (Stockton to Santa Cruz) and the new Route 5 (Redding-Sacramento “Salmon Runner”) for bus-only ticketing. Additionally, SJJPA will coordinate with the Butte County Association of Governments (BCAG) to potentially implement adjustments to Route 3 between Chico and Sacramento. These changes could enable more round trips between Chico and Sacramento with bus-only ticketing while also providing cost-savings to SJJPA for the thruway network.

Thruway Optimization

SJJPA pursues strategic partnerships with regional agencies and stakeholders to enhance Thruway performance, expand intercity connectivity, and integrate services with local/regional networks and reduce Public Transportation Account (PTA) costs borne by SJJPA through new local, regional, and state funding contributions. Efforts emphasize leveraging partner investments, aligning patterns, improving travel times, reducing duplication, and preserving seamless access/integrated ticketing for Gold Runner passengers.

Interline agreements enable Gold Runner passengers to use partner intercity bus services with integrated ticketing, extending reach beyond the core network. SJJPA will evaluate these agreements for cost-effectiveness, customer benefit, and alignment with program goals through performance and financial analysis. Interline services will

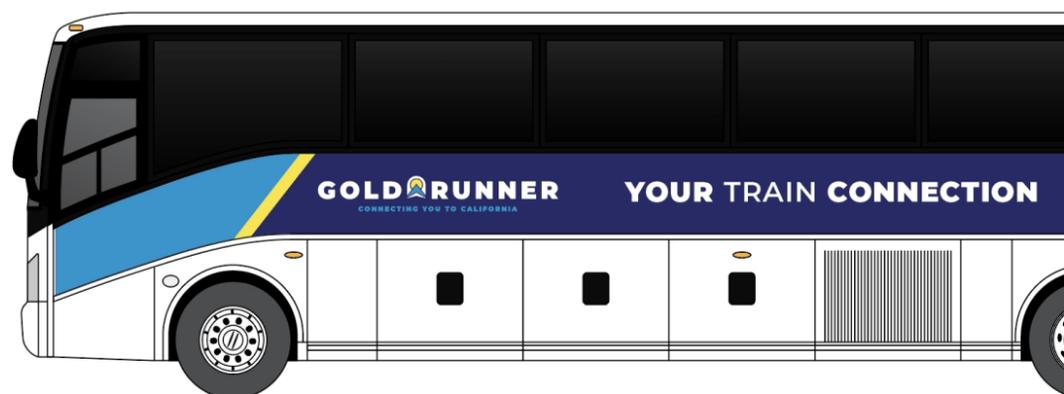
continue in FY26/27 to maintain continuity during this review, leading to a more transparent, performance-based program.

Service Quality Improvement

During FY26/27, SJJPA will focus on strengthening the Thruway Bus network as a core component of Gold Runner's statewide connectivity by advancing targeted planning, partnerships, and service refinements. SJJPA will focus planning for the near-term, mid-term, and longer-term timelines to identify targeted and achievable improvements that enhance coverage, reliability, ridership, cost-effectiveness, and integration with the intercity passenger rail system (including future high-speed rail operations in the San Joaquin Valley).

Key corridor initiatives will advance toward implementation or refinement. SJJPA will continue developing Route 5 North State partnerships to strengthen service along the I-5 corridor between Redding and Sacramento, with the goal of positioning the route for implementation beginning in 2026. Route 6 will be optimized through expanded bus-only ticketing, evaluation of integration opportunities with San Joaquin RTD Route 150 to Dublin BART, and coordinated adjustments with Routes 3, 40, and 56 to improve efficiency and connectivity.

Additional efforts will focus on improving network cohesion and long-distance connectivity. SJJPA will continue restructuring and coordinating Route 7 to streamline North Bay operations, leverage SMART rail expansion, and strengthen local and regional connections. For Route 40, SJJPA will support post-launch performance through ridership monitoring, interagency coordination, targeted promotion, and schedule alignment with connecting services to improve connectivity and grow demand. Finally, SJJPA will advance planning for a pilot connection for Route 1 between Bakersfield and Metrolink at Newhall Station, laying the groundwork for future bus connections to Pacific Surfliner service along the Antelope Valley Line in coordination with state and regional partners.



Service Expansion Planning and Future Growth

SJJPA continues to advance a phased service expansion strategy for Gold Runner that increases frequency, improves market balance, and positions the service to support future high-speed rail connectivity. The initial expansion of Gold Runner includes the introduction of an eighth and ninth daily round-trip, expanding Sacramento service from two to four daily round-trips while maintaining five daily round-trips to the Bay Area.

In the near term, FY26/27 will focus on advancing the planning and readiness required to support the eighth and ninth daily round-trips. SJJPA will refine a detailed service plan for eight and nine-round-trip operations, including schedule development, operating concepts, and additional analysis of infrastructure and capacity requirements. This work will be coordinated through the Corridor Development and Improvement Portfolio (Corridor ID) and will culminate in a proposal suitable for review and consideration by host railroads. Initial planning assumes the initial additional round-trip would originate and terminate at the San Joaquin Street Station in Stockton, with timed connections to existing services, allowing for scalable extension as future system conditions evolve.

As part of the broader expansion framework, SJJPA will continue planning for increased Sacramento-focused service using the UPRR Sacramento Subdivision. This concept supports future service to emerging station markets, including Natomas, Old North Sacramento, Midtown, City College, and Elk Grove, with the potential for integrated ground transportation connections as service levels warrant. Longer-term planning will prioritize increased frequencies between Sacramento and Central Valley destinations to strengthen feeder service to high-speed rail, while maintaining strong Bay Area connectivity and evaluating opportunities for expansion north of Sacramento as demand, funding, and infrastructure capacity allow. SJJPA will continue collaboration with the Tri-Valley–San Joaquin Valley Regional Rail Authority to support Valley Link planning and ensure future interoperability across service, infrastructure, and equipment.

Future Alignment and Integration with High-Speed Rail

SJJPA is actively positioning Gold Runner to integrate with the California High-Speed Rail Authority's (CHSRA) Early Operating Segment between the Central Valley and Bakersfield, anticipated to begin service in the early 2030's. This work is focused on advancing coordinated service planning, infrastructure readiness, and operational alignment to ensure Gold Runner is prepared to connect seamlessly with high-speed rail at launch.

Key initiatives include advancing station improvements and relocations, completing environmental clearance and design for future high-speed rail interfaces, and coordinating systemwide readiness efforts. These efforts span fare and ticketing integration, service planning, operational preparation, grant development, and market readiness. For example, the requested funding for ticketing will be used to continue to partner with the California Rail Alliance. In parallel, SJJPA continues to pursue and implement agreements with CHSRA and CalSTA that establish a clear framework for Gold Runner's role in supporting interim high-speed rail operations.

Together, these actions position Gold Runner as a critical feeder and connectivity service, strengthening statewide mobility through improved frequencies, reduced travel times, increased reliability, and expanded market reach. By aligning planning, operations, and passenger experience early, SJJPA is laying the groundwork for a fully integrated intercity rail network that maximizes the benefits of high-speed rail investment and supports long-term ridership growth and system sustainability.





PASSENGER EXPERIENCE AND MARKETING

Fares and Cost Efficiency

Efforts to realign Gold Runner fares began in 2018, following an SJJPA board action to establish distance-based fare setting methodology for both train and Thruway buses. Due to the pandemic, the SJJPA had refrained from adjusting fares as the focus was on rebuilding ridership. In October 2025, SJJPA implemented a 7.5% increase of fares across the service. To ensure that fares keep pace with market and operational demands, a bi-annual evaluation of a fare increase for both train and thruway services was implemented following a May 2025 board action. Additionally, to ensure that the Gold Runner service can attract and appeal to as many riders as possible, SJJPA will continue to leverage market research and data insights to diversify product offerings.

Marketing, Public Relations, and Outreach

SJJPA maintains a yearly budget of \$1,750,000 to facilitate an integrated marketing, public relations, and outreach plan that focuses on growing brand awareness, increasing ridership, developing partnerships, and elevating passenger experience.

Marketing and Advertising

For the Gold Runner service, SJJPA employs a strategy that combines digital and traditional media to reach current and prospective riders. Leveraging data insights, campaigns are developed and executed throughout the year with key messaging to promote offers, highlight destinations, and drive engagement through data-enriched targeting. Current advertising channels include display, paid search, digital audio, social media, and commercial

videos in addition to traditional radio, billboard, print and sponsorship marketing. Previous advertising efforts have included a successful campaign such as our Senior 50% off Midweek Travel pictured below, resulting in almost 5 million impression and over 43,000 clicks in July 2025.

TAKE THE SCENIC ROUTE!
50% OFF
SENIOR TRAVEL
TUESDAY-THURSDAY!*
THRU JULY 31, 2025
BOOK NOW

BUY 1 FARE, GET UP TO 5 MORE AT
50% OFF
USE CODE V302 AT CHECKOUT

To support ridership growth, reinforce the rebranded service, and maintain consistent market presence, SJJPA will implement a structured FY26/27 paid media campaign calendar balancing both evergreen campaigns and targeted promotional windows.

The evergreen campaigns will anchor paid media efforts, ensuring year-round visibility, aligning creative with seasonality, and appealing to a broad audience. The campaign will be built on a well-established companion offer of Buy One Ticket, Get 50% Off Up to 5 More Tickets, encouraging travel with small groups, family, and friends.

In addition to the evergreen efforts, the paid media plan will include more targeted promotional offers that are designed to address farebox recovery in high-value rider segments. An active senior focused campaign will be launched in the fall focusing on media placements and creative that is targeted to an audience 65 years and older. In addition to this, there will be a midweek focused fall sale to support low ridership days. This campaign will target an audience aged 18-54 with creative focus on highlighting short getaways, work travel, and school travel and emphasize the ease and affordability of the service.

During historically low ridership months at the beginning of the calendar year, SJJPA will launch a new seasonal campaign that appeals to budget-conscious travelers who plan post-holiday adventures. This will then lead to a spring offer that prioritizes traveling with one or more people whether traveling for work, school, or leisure. Together, this campaign framework will ensure a consistent and relevant paid media footprint while still allowing performance-based flexibility and optimization.

On November 3, 2025 Amtrak San Joaquins was rebranded as the Gold Runner service, creating a cohesive and recognizable identity across the passenger experience, positioning the service as a modern intercity rail option in California. The rebrand marketing effort will continue to include updated station signage, platform wayfinding, along with refreshed train exterior livery, interior branding, and crew materials to reinforce the Gold Runner identity. The rebrand will also extend to digital media, including service webpages, social media, and real-time passenger information systems. Complementary marketing, printed materials, and outreach efforts will introduce the updated brand and highlight the service's speed, reliability, and convenience, supporting stronger brand recognition and future ridership growth.



Public Relations

SJJPA is implementing a forward-looking plan to improve connectivity, expand service, and enhance passenger experience. With the transition to Gold Runner, this effort marks the beginning of a phased approach to improve and expand intercity rail service throughout Central Valley and beyond.

To meet the evolving needs of our passengers and our agency, SJJPA is continuing and expanding its outreach efforts. These efforts are essential to informing the general public about the availability and the benefits of intercity rail service in the region, strengthening community awareness, and building meaningful relationships with local partners. A consistent focus on positive public relations helps reinforce the value of passenger rail in some of California's most vital, and economically disadvantaged regions.

In addition, SJJPA is prioritizing stakeholder engagement and community presence as core elements of its public relations strategy. Participation in community events, local celebrations, and stakeholder convenings provides opportunities to build trust, strengthen visibility, and position the agency as an active and invested community partner. These engagements support the development of strong working relationships and generate goodwill that benefits the agency as service expands and evolves.

Public Relations is essential to SJJPA and serves as a critical link between external outreach and nearly every department within the agency, including Programs, Grants and Planning, Operations, and Capital. Given the scale of current and upcoming capital investments, particularly major initiatives such as the Valley Rail program, it is vital that messaging remains clear, consistent, and well-coordinated. As the agency continues to expand and deliver transformative projects, there will be an increased focus on proactively telling SJJPA's story. This includes highlighting Valley Rail milestones, key partnerships, program and grant initiatives, planning efforts, capital delivery, and operational achievements to build awareness, demonstrate impact, and support efforts to secure additional funding and long-term support.

In parallel, SJJPA is strengthening its engagement with federal partners as a core component of its communications and outreach strategy. Coordination with the Federal Railroad Administration, the U.S. Department of Transportation, and other federal agencies is essential to aligning SJJPA's programs with national transportation priorities and positioning the agency for competitive discretionary grant opportunities. Proactive federal outreach ensures that the needs of the Central Valley are clearly communicated at the national level and supports SJJPA's ability to secure and steward federal funding critical to delivering major capital projects, advancing service expansion, and sustaining long-term system growth.

Furthermore, amid multiple policy and funding shifts at both the local and state levels, the agency is focused on improving education and engagement with the many stakeholders across the corridor. Specifically, it is estimated that approximately 220 elected officials at the local, county, state, and federal levels have some degree of jurisdictional overlap with the Gold Runner service area. Proactive educational outreach to these elected leaders is critical to building long-term support and securing future funding opportunities.



Grassroots Outreach

As the Gold Runner service expands to encompass new stations like Oakley and new Thruway corridors such as routes 5 and 40, it is imperative that SJJPA continue to invest in on-the-ground efforts to educate communities across the region about new connections and destinations. Throughout the year, SJJPA will continue to participate in community, stakeholder, college and university, conferences, and business development events to reach prospective riders and to encourage additional travel for current riders.

Establishing strong, diverse partnerships has proven successful for the Gold Runner service, and SJJPA will continue to deepen existing relationships as well as connect with new partners to grow brand awareness. In the coming fiscal year, SJJPA will partner with and promote travel to Colonel Allensworth State Park, the California State Railroad Museum, Castle Air Museum, the Lodi Wine Trolley, and many more key partners throughout the state.



Market Research

To continuously improve the onboard passenger experience for Gold Runner trains and thruway bus service as well as to identify new riders, SJJPA conducts bi-annual passenger and market research.

For SFY 2026 and 2027, as with years past, this research will include both onboard data collection to capture current rider demographics, trip purpose, satisfaction and awareness in addition to off-board research methods to gather insights

from non-riders. Together, this data is compiled into a comprehensive report that informs marketing strategy, messaging, service planning, and passenger experience improvements.

Given the recent changes to the service including removing café car service, the addition of new routes, schedule changes, and a full service rebrand, it is critical to track how these changes have affected awareness, perception, and ridership behavior over time. This fiscal year will incur a cost of \$300,000 to facilitate these surveys.

Station and Onboard Amenities

There have been and will continue to be changes to various aspects of the Gold Runner service both onboard trains and buses as well as at stations. Over the next year, there will be a focus on continuing to evolve the food and beverage experience; the introduction of a Comfort Class travel option as the first product offering under the Business Class Study initiative; the initial rollout of updated passenger information technology; and signage updates.

Food and Beverage

SJJPA is continuing to expand and improve the food and beverage program for the Gold Runner, leveraging new and unconventional methods of delivering options to riders, despite not having Cafe Cars available. Complimentary service is anticipated to continue throughout the year as program initiatives continue to advance:

Vending Program: Critical milestones are near completion for the program with the fire safety analysis underway, and SJJPA is working with the equipment vendor to make modifications that would comply with the Federal Railroad Administration (FRA) guidelines. Once approved, a pilot testing of the equipment on board one of the Venture trainsets will begin. It is anticipated that the pilot will start in SFY 2027. Following a successful pilot, all Venture cars would be outfitted with vending machines offering snacks, ready-made meals, and hot and cold beverages.

Pre-Boarding Meals: The delays in being able to roll out the vending program have created a need for SJJPA to explore other alternatives for connecting passengers to food and beverage options at stations while waiting or transferring between services. In December 2025, SJJPA worked with the City of Bakersfield to introduce assigned spots for food trucks to park at the station. Being a high-traffic station with lots of connections, Bakersfield was chosen as the pilot station for this new program. SJJPA is looking to expand this model to other stations such as Fresno, Modesto, and Sacramento.

Cart Service: The Venture Cab cars coming into service add additional storage space and opportunities to evaluate another option for food service delivery. SJJPA is assessing the possibility of leveraging the storage space for food carts that would allow onboard attendants to introduce cart service. Should this be an effective channel, it will not only expand the options of inventory carried onboard the train, but it could also allow for a limited menu of sellable items on board directly to passengers at their seat.

SJJPA will continue to work with a third-party for provisioning, as this has already provided a reduction in operating costs, even while offering complimentary items. For the upcoming year, the food and beverage program will require \$3.9M to cover annual operating costs.



Comfort Class

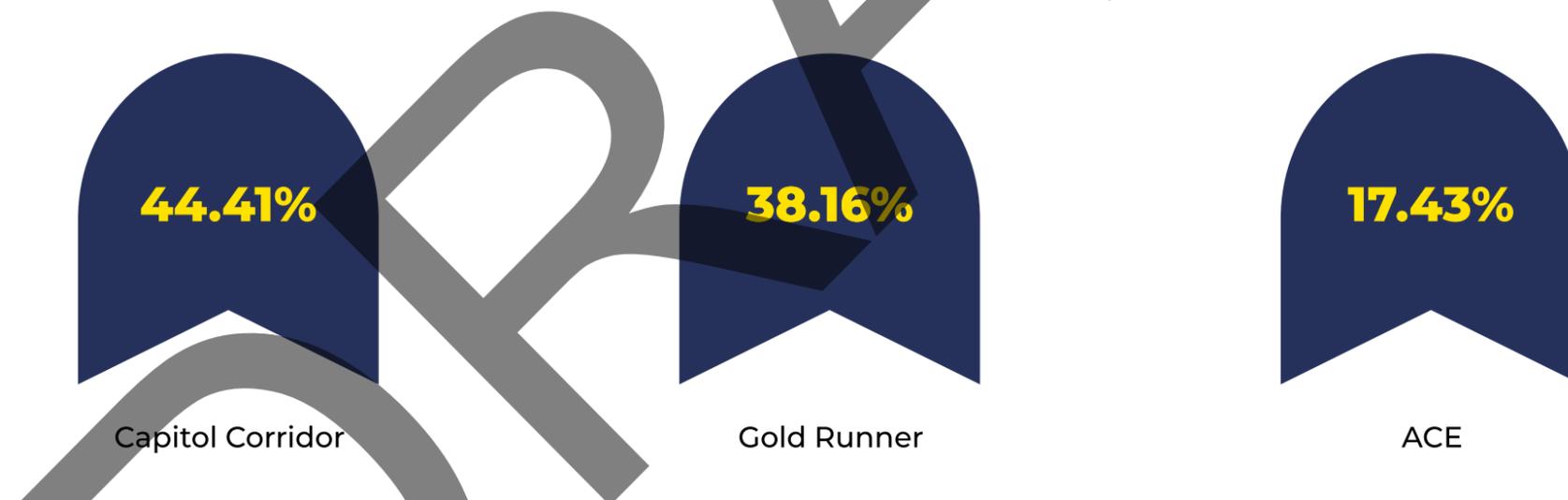
In the fall of 2025, SJJPA began a Business Class Study supported by the feedback gathered from passenger surveys and market intelligence. Preliminary research has indicated that this could be a revenue positive initiative with increased fares from current riders that want to upgrade in addition to a means to attract a new demographic of riders that want an elevated experience.

The study is also designed to provide a phased approach that encompass very minimal modifications to the current equipment such as lighting, more privacy, and additional amenities; a more involved approach that could involve structural changes to the car, such as new seating or seating configurations; and finally, the research will also help evaluate what could be achieved for a Business Class service with the procurement of new equipment as a longer term goal. These efforts lead to a seamless passenger experience between Gold Runner and future high-speed rail service that will also have a demand for a Business Class experience.

Gold Runner is the only intercity passenger rail service with a route over 250 miles that does not offer a business class option, again indicating that there is a market interest. The type of offerings vary greatly by route, allowing SJJPA to design an experience that is specific to the service and considers Thruway Bus travel as well. SJJPA is moving forward with phase one of the program, which allow for modest improvements that distinguish the experience and more in line with a comfort class, or a level above traditional coach travel. Conservative projections are that the comfort class model has the potential of realizing an additional \$1-3M in revenue each year for the service. The initial phase will include slight modifications to seven Venture cars, an augmented version for bi-level equipment, and a solution to carry over into the Thruway buses with an initial investment of \$1M to cover the project.

Passenger Information Displays (PIDS) and Signage

In November 2018, CCJPA, with the support of SJJPA and SJRRC, issued a Request for Statement of Qualifications (RFSOQ) to upgrade and replace the existing, legacy Passenger Information Display system (PIDS), with the modern version. As a result of the procurement, CCJPA awarded its contract in November 2019 to XenaTech Software Integration Services, LLC (XenaTech) for the design, testing, implementation, and maintenance of a solution called CalPIDS. By December 2020, CCJPA took over the operational and mechanical responsibilities of legacy PIDS from Amtrak, and shared costs among the three services:



Delays in project delivery for CalPIDS continue to extend past the initial 18–24-month design and implementation plan, which has required the ongoing reliance and legacy PIDS. The most recent timeline update is that Capitol Corridor stations would all be upgraded to the CalPIDS solution by the end of calendar year 2026. No new completion date has been established for Gold Runner stations. The San Joaquin Regional Rail Commission (SJRRC) is currently working towards identifying a new PIDS solution for ACE, which can work as a template for upgrading the PIDS at Gold Runner stations. SJRRC is approaching the project with a goal to have non-propriety equipment and technology that can easily integrate with other systems, particularly at shared stations. In the interim, Gold Runner will need CCJPA to continue management of the legacy PIDS systems for both ACE and Gold Runner.

In addition to this new technology planned for the station, SJJPA will be updating station signage and wayfinding for Gold Runner stations. With the service newly rebranded, current signage will need to be changed and updated at stations and along Thruway Bus routes. Additionally, in alignment with the Valley Rail Program, SJJPA completed the design manual for its signage and wayfinding which looks to create a unified look of these assets across ACE and Gold Runner stations.

Safety and Security

Ongoing capital improvements, communication, collaboration, and education are essential to the safety and security of Gold Runner passengers, the public, staff, and areas in and around equipment. SJJPA partners with local law enforcement and rail stakeholders to identify and address risks, with emphasis on (rail stakeholders listed in Appendix Table APP.4)

- Vehicular and pedestrian safety at highway-rail grade crossings, including rural private crossings;
- Pedestrian safety along the right-of-way;
- Security at stations and facilities;
- Passenger safety onboard trains and buses; and
- Emergency preparedness training and exercises coordinated with first responders.

Safety and Security Program for SFY 2026 and 2027

In the coming year, the program will be focused on two objectives: (1) implementation of targeted capital improvements and corrective actions to mitigate risks and eliminate unsafe conditions; and (2) providing education, training, and outreach to build safety awareness and best practices among partners and stakeholders.

Capital Improvements

SJJPA conducts systematic risk assessments of the right-of-way, stations (including parking lots and platforms), and trains to guide physical improvements. Bi-annual inspections use the Risk-Based Hazard Analysis and Assessment Program, with prompt follow-up on reported concerns and documented mitigation shared with partners.

Key initiatives include:

- Fencing upgrades along the corridor, with a focus on Phase 4 of the BNSF project (starting in the Bakersfield station area) to address encampments; and fencing at trespassing hot spots and locations with high near-miss incidents.
- Clearing encampments near the right-of-way, stations, and neighboring areas affecting operations.
- Improving safety and security signage, including suicide prevention and rail safety messaging.
- Minor safety-related repairs in targeted areas of need, including at Stations maintenance facilities.

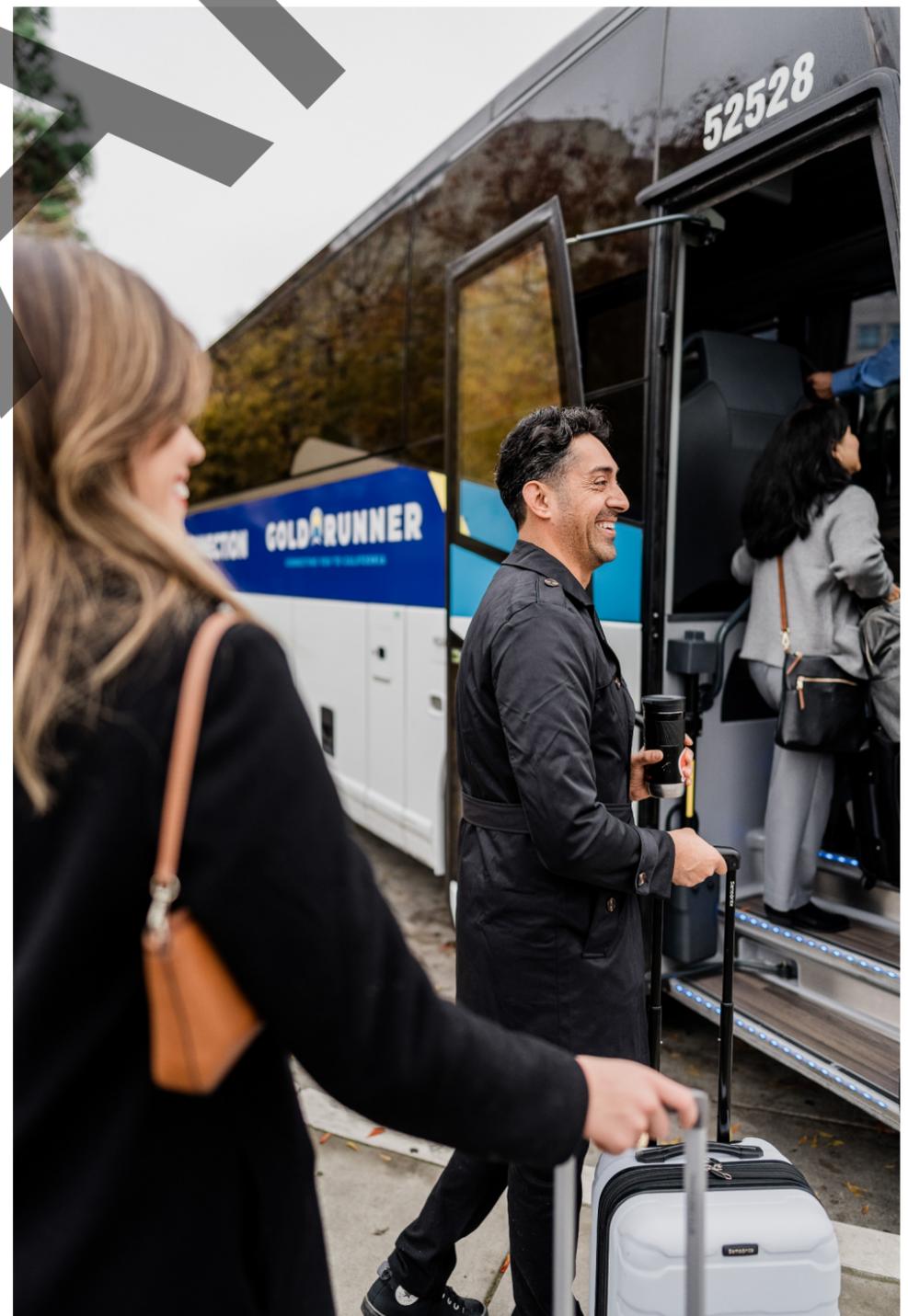
Educational Activities

SJJPA draws on training and resources from the Department of Homeland Security (DHS) and TSA to expand existing

programs, provide refresher training, and to launch new initiatives. Emergency preparedness exercises prepare first responders for critical incidents, incorporating realistic scenarios, drills, and coordinated responses to hazards such as flooding, high winds, and extreme temperatures through the lens of the rail.

Participants include Amtrak Police, local law enforcement, emergency responders, train crews, customer service managers, public information officers, and transit partners. Additionally, SJJPA promotes rail safety awareness along the corridor in partnership with Northern California Operation Lifesaver, reaching diverse audiences including employees, non-English speakers, agricultural workers, students, professional drivers, law enforcement, and emergency responders.

To support the safety and security program for FY26/27, SJJPA is requesting \$650,000, which will help with important safety maintenance, repairs, and training along the Gold Runner route.





CAPITAL PROGRAM OVERVIEW

The San Joaquin Joint Powers Authority (SJJPA) manages a diverse group of capital investment portfolios that support both the expansion of intercity passenger rail service and the continued improvement of the Gold Runner system. These capital investments are organized using a portfolio-program-project framework to ensure strategic alignment, effective oversight, and clear communication of priorities. SJJPA is working in partnership with San Joaquin Regional Rail Commission (SJRRRC) on the Valley Rail Program for expanding Gold Runner and ACE services.

SJJPA's capital efforts are guided by the need to improve service reliability, expand access to new markets, enhance the passenger experience, and position the agency to successfully compete for state and federal funding. Given escalating construction costs and increasing competition for limited funding sources, SJJPA continues to refine its approach to project prioritization, risk management, schedule control, and funding alignment to support timely and successful delivery of capital projects.

Capital Investment Portfolios

Corridor Development and Improvement Portfolio

Program	Program Focus	Representative Project Examples
Corridor Capacity and Operational Improvement Program	Phased expansion of intercity (Gold Runner) and commuter rail (ACE) services; corridor capacity and operational improvements	Valley Rail North and South projects; new stations; track and siding improvements; layover facilities; rail junction improvements
FRA Corridor Identification and Development Program	Long-term intercity corridor planning and development consistent with federal and state rail planning requirements	Gold Runner service extensions to Chico and Redding; service development planning; environmental review; preliminary design

Core Service and Asset Improvement Portfolio

Program	Program Focus	Representative Project Examples
Customer Experience and Station Access Program	Systemwide improvements to station access, accessibility, passenger information, and customer-facing infrastructure	Public Information Display Systems (PIDS); digital and static signage; Mini-High Platforms; platform extensions; station amenities and access improvements

Table CPO.1

Corridor Development and Improvement Portfolio

The Corridor Development and Improvement Portfolio (Corridor ID) focuses on large-scale, transformational investments that expand passenger rail service, increase corridor capacity, and advance long-term intercity rail development. Projects within this portfolio typically involve multi-agency coordination, significant external funding, and phased implementation over multiple years. This portfolio includes capital programs that are essential to advancing new service markets and supporting statewide and federal rail planning initiatives.

Two primary programs are included within this portfolio: the Valley Rail Program and the Federal Railroad Administration (FRA) Corridor Identification and Development Program.

Corridor Capacity and Operational Improvement Program

The Valley Rail Program is a phased capital program focused on expanding Gold Runner and ACE passenger rail service within the Sacramento–San Joaquin Valley corridor. The program advances infrastructure projects necessary to support Valley Rail North, connecting Sacramento to the San Joaquin Valley for both Gold Runner and ACE services, and Valley Rail South, extending ACE commuter rail service into Stanislaus County.

Implementation of Valley Rail North prioritizes early service expansion with projects currently advancing through environmental review and design. These improvements will enable additional intercity and commuter rail round-trips, benefiting both Gold Runner and ACE riders, expanding access to new stations, and serving emerging transportation markets. Concurrently, Valley Rail South efforts continue to advance project development activities and pursue additional grant funding opportunities to support future service expansion.

Projects within the Valley Rail Program include new stations, track and capacity improvements, layover facilities, and rail junction enhancements that collectively improve operational efficiency, reliability, and long-term service growth.

Federal Railroad Administration 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. Created by the Federal Railroad Administration (FRA) in 2023, the Corridor ID program is a requirement of the Bipartisan Infrastructure Law to establish a pipeline of priority, federally

funded projects intercity passenger rail corridors. Following a scoping stage to determine corridor readiness relative to program requirements, federal funding is allocated for service planning, environmental review, and preliminary design stages to corridors accepted by the FRA.

In early 2023, following the FRA request for corridor projects, Caltrans applied on behalf of SJJPA for expanded Gold Runner service between Sacramento/Oakland and Merced, including long-term extensions to Chico and Redding, which the FRA accepted into Corridor ID. All Corridor ID projects were accepted into the first program iteration at the initial scoping stage, requiring participating states and corridor partners to receive approval from FRA to advance into and complete subsequent service development planning, environmental review, and preliminary design stages.

FRA approved a scope of work, schedule, and budget developed by Caltrans and the SJJPA for the Gold Runner corridor service development plan in late 2025. The scope and service planning process for the plan is consistent with the California State Rail Plan. During 2026, SJJPA will coordinate with Caltrans to develop a service development plan for FRA and, if approved, is expected to be completed by 2029. Additionally, to advance the existing capital improvement program, SJJPA will work with Caltrans for both state and federal support through the Corridor ID Program.

Core Service and Asset Improvement Portfolio

The Core Service and Asset Improvement Portfolio focuses on ongoing, systemwide capital investments that enhance the functionality, accessibility, and passenger experience of the Gold Runner service. Unlike large-scale expansion programs, projects within this portfolio emphasize minor capital improvements to existing stations, passenger information systems, accessibility features, and customer-facing infrastructure.

This portfolio supports near- and mid-term capital priorities that improve safety, clarity, comfort, and operational efficiency while ensuring that the existing system continues to meet customer needs and regulatory requirements.



Customer Experience and Station Access Program

The Customer Experience and Station Access Program groups projects that improve how customers access, navigate, and experience the Gold Runner service across stations and facilities. Projects within this program focus on signage and wayfinding, passenger information systems, platform and station accessibility, and station environment improvements.

Key initiatives include the modernization of digital and static signage, implementation of Public Information Display Systems (PIDS), installation of Mini-High Platforms to support accessibility for high-floor rail cars, platform extensions, and station area improvements. Collectively, these projects enhance boarding efficiency, improve accessibility, reduce dwell times, and provide clearer, more consistent passenger information across the system.

Capital Improvement Program FY26/27 Highlights

In the upcoming fiscal year, SJJPA's short-term capital priorities will focus on major track improvements, enhanced safety and security features, improved passenger information systems, new and relocated stations, and accessibility enhancements. These investments support both near-term service reliability and long-term strategic goals, ensuring that the Gold Runner system remains competitive, accessible, and responsive to customer needs while advancing future service expansion opportunities.

Oakley Station

A new Oakley Station will be located at the intersection of Main Street and Norcross Lane in the city of Oakley. Features include a 700-foot platform, a 300-space parking lot, signage, landscaping, and improved access to public transit for the community. Support from local officials, including Contra Costa County Supervisor and SJJPA Board Vice Chair, Diane Burgis, emphasizes Oakley's investment and readiness to provide a modern, safe, and accessible transportation hub for the growing East (Contra Costa) County region. As a way to integrate the service into the community, the station will include passenger shelters designed to match the style of similar bus shelters in and around the city.

Once the Oakley Station is operational, the current Antioch Station will be decommissioned. SJJPA has worked closely with Antioch city officials and community members to address concerns surrounding safety and the station closure as well as initiatives that could be addressed during the transition, which has included additional lighting, new landscaping, and new signage.

Construction for the Oakley Station is set to begin in the winter of 2026 and open in quarter two of 2027. The projected annual ridership is 35,000 to 52,000.

Madera Station Relocation

The Madera Station Relocation project will move the existing station from Madera Acres to just north of Avenue 12. The new, intermodal station features a 600-foot platform, local bus connections, and a direct connection to the future California High-Speed Rail service. This project is supported by a partnership of local agencies including Madera County Transportation Commission, Madera County, City of Madera, California State Transportation Agency (CalSTA), and the CHSRA.

As the primary transit route for the county, Avenue 12 provides excellent access to State Route 99 and central Madera, improves access for the southern end of the county and accommodates future growth in southeast down to north Fresno, and supports transit-oriented development. The Madera Relocation project has three major construction categories, trackwork, station, and roadway modifications which are planned to begin in mid-2026, with the station projected to open in late 2028.

San Joaquin Street Layover

The San Joaquin Street Layover will facilitate a new short-run passenger rail service between Stockton and Sacramento and connect with the Gold Runner service. The project requires a minimum of 600 feet of track within 2 miles of the Stockton San Joaquin Station and accommodate current railcars and locomotives. Additional plans for the layover include paved siding, fencing, lighting, and security.

The layover site will provide the location and track to reliably terminate and originate service to and from the Stockton San Joaquin Station to facilitate additional round-trips between Stockton and Sacramento that will allow train-to-train transfers with service between Oakland, Stockton, and Sacramento (instead of a Thruway bus connection). Currently in the environmental phase for potential site evaluation, the project will undergo the California Environmental Quality Act (CEQA) process, as required for rail projects, which is anticipated to be completed in late 2026.

Stockton Wye

The Stockton Wye project provides a connection between the UPRR Fresno Subdivision and the BNSF Stockton Subdivision, located in the northwest corner of the existing at-grade crossing between the two freight railroads. This

Stockton Wye supports capacity increases of the Gold Runner as well as improving efficiency of the regional commuter (ACE) services and freight rail services.

Additionally, this initiative will help to improve rail traffic through the crossing and allow easier access to the Port of Stockton.

The Stockton Wye project includes approximately 594 feet of trackwork, modifications to two at-grade crossings (Stanislaus and Aurora Streets), removal of existing track segments, relocations of signals, switches, and sidewalk areas.

Construction is planned to be completed in June 2026. Signaling work has been completed, and the remaining trackwork requires connections to both the UPRR and BNSF main tracks.

Control Point (CP) Lake to CP West Escalon

The Control Point Lake to Control Point West Escalon Track Improvement Project creates a critical win-win for both the Gold Runner Service as well BNSF as it will connect two existing segments of double track on the BNSF Stockton Subdivision by adding a second main track and related improvements between Lake and West Escalon in Escalon, California. The 3.8 miles of new double track – when combined, the existing double track between West Stockton and Lake with an existing segment of double track through Escalon will create approximately twenty-three (23) miles of continuous double-track along this segment of the corridor.

The goal of this effort is to increase operational efficiency, allow for more reliable and predictable scheduling, improve on-time performance, increase top speed, and is critical to enabling the extension of the 8th round-trip for Gold Runner to Merced to connect with future high-speed rail. In addition to the new track, the work will include turnout removal; modification of 6 at-grade crossing; 9 culvert extensions; installation of signals to support bi-directional train operations; as well as grading, drainage, fencing, and landscaping (hydroseeding). This project was designed and is being constructed by BNSF, the latter of which began in 2024 and currently has embankment and grading activities in progress. Completion is anticipated in the second half of 2026.

Stockton Diamond

The Stockton Diamond project builds a new overpass to carry Union Pacific Railroad (UPRR) trains over Burlington Northern Santa Fe (BNSF) tracks, easing congestion and

improving freight and passenger rail efficiency through a critical junction.

Since the effort began in 2020, accomplishments have included securing CEQA/NEPA (State and Federal) environmental approvals, obtaining roughly \$400 million in federal, state, and local funding, completing all necessary property acquisitions and utility agreements, and reaching the 100% design phase. The Stockton Diamond is now positioned for the next phase, which involves a hand-off to a large agency that can deliver a project of this magnitude through construction. This important milestone reflects extensive coordination with UPRR, BNSF, Caltrans, and local partners, often going beyond our original responsibilities outlined in the California High Speed Rail Authority (CHSRA) Memorandum of Understanding (MOU).



Platform Accessibility for High-Floor Cars

The introduction of Siemens Venture Cars has created some passenger experience and operational challenges for the Gold Runner service, particularly with the high floors of the cars. Currently, boarding/deboarding cars require passengers to utilize steep stairs which not only limits accessibility but also slows boarding and, in turn, increases 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 Gold Runner stations. The Mini-High Platforms will be installed at stations along the BNSF corridor first with the UPRR stations following behind as SJJPA continues to work with the railroad through the installation designs.

San Joaquin Corridor Second Platforms at Modesto and Turlock/Denair Stations

This is a Caltrans-led project that is required for the Golder Runner service to achieve eight (8) round-trips to connect with high-speed rail. The project will extend the existing station platforms and construct a second platform at two locations. A single platform currently serves these stations and whenever there are opposing meets, one train must wait farther out at a siding while the other train serves the station. The construction of the second platform will allow two passenger trains to operate at the station simultaneously. The project is also needed to eliminate delays and improve on-time performance of intercity rail passenger services through the entire Gold Runner Corridor.





STATE RAIL FLEET INITIATIVES

In SFY 2025-2026, SJJPA, Caltrans, and CCJPA completed a major strategic initiative to transition maintenance of the Northern California fleet of equipment that supports the Capitol Corridor and Gold Runner services to SJJPA. Over the long term, this transition will enable a more efficient and reliable fleet maintenance program, increasing fleet availability and service stability while controlling costs. The transition of fleet maintenance significantly expanded SJJPA's roles and responsibilities in regard to the management of the State-owned and controlled intercity rail fleet. It requires close coordination with Caltrans to ensure the funding required to maintain the existing and new fleet and bring the fleet into a state of good repair, not only in this fiscal year but for future years to come. In addition to advancing projects and initiatives to enhance passenger experience and reliability for the Gold Runner, SJJPA serves in both lead and advisory capacities for several major State rail initiatives.

Intercity Rolling Stock Fleet

The Northern California rolling stock is comprised of 70 legacy vehicles (California 1 and 2 bi-level cars), 49 single-level Venture cars, and 23 locomotives. Currently, to operate and maintain the equipment, the annual program costs are approximately \$39.5M, and based on service utilization, \$17.1M can be assigned to Capitol Corridor and \$22.4M for the Gold Runner.

Northern California Intercity Rolling Stock				
Series	Vehicle Type	Qty.	Years in Service	Last Overhaul
Cal 1 Bi-level	Cab Car	14	14	2008
	Coach	38	38	2008
	Cafe/Diner	14	14	2008
Cal 2 (Surfliner) Bi-level	Cab Car	5	24	-
	Coach	2	24	-
	Food Service	2	24	-
Venture Car Single-level	Cab Car	7	>1	-
	Coach	28	1	-
	Vending	14	1	-
Comet car Single-level	Coach	4	56	2013
EMD F59PHI Tier II prime mover Tier IV HEP	Locomotive	13 <small>(2 decommissioned)</small>	22	2011
Siemens SC-44 Charger Tier IV	Locomotive	10	8	-

Table SRFI.1

Mechanical Transition

In 2025, working in partnership and coordination with Caltrans, CCJPA, and LOSSAN, SJJPA executed the Mechanical Transition Agreement and assumed the responsibility to maintain the Northern California Intercity Rolling Stock. Under the agreement, SJJPA is responsible for restoring the fleet to a state of good repair, reducing cost through efficiencies and increasing fleet availability. TransitAmerica Services, Inc. (TASI) is under contract with SJJPA to provide mechanical services and is responsible for the development and execution of scheduled maintenance, repairs, and maintenance planning.

State of Good Repair

Equipment maintenance and cleaning are completed at the Oakland Maintenance Facility (OMF) and the Stockton Rail Maintenance Facility (RMF); however, with the OMF being jointly owned by Amtrak and Caltrans, and with Union Pacific Rail Road (UPRR) owning the outdoor material storage, parking and access road (currently leased by Amtrak from UPRR), access to the required shop facilities has become limited and requiring augmented solutions to conduct certain maintenance requirements. SJJPA is exploring ways to resolve and improve options for equipment maintenance for the long term. As part of the transition process, SJJPA has been conducting inspections of each car and locomotive to ensure operability and has been working in coordination with CCJPA to complete critical work. Addressing fleet availability will require continued coordination with the State to ensure adequate funding for state-of-good-repair investments.

Cost Reductions

The intermediate goal of improved in-service readiness which would allow for extending consist size and the long-term goal of equipment optimization will require a steady reinvestment of funding to achieve progressive maintenance. The transition to Lifecycle Preventative Maintenance (LCPM) and adjusting the fleet maintenance approach to a “consist based maintenance,” performing maintenance and repair when equipment is laid over for more than 1 hour at a maintenance facility or layover point is expected to reduce cost and down time. Future costs are anticipated to right size mid-life overhaul costs and improve all of the California State-Supported services.

Fleet Availability Improvement

Given the limited equipment to support the full-service levels of train trips for each of the California state-supported services, it is critical that SJJPA be positioned to support the State’s goal to overhaul the legacy fleet of equipment, introduce and align the full number of Venture cars into service, and redistribute equipment among the three JPAs. These efforts are all a part of the Statewide Fleet Working Group led by Caltrans. The purpose of the working group is to bring together CCJPA, LOSSAN, and SJJPA to address critical fleet related initiatives. The most immediate projects benefitting all three JPAs include but are not limited to: major fleet modernization and zero emission transition.



Fleet Modernization and overhaul

Locomotives

Caltrans, CCJPA, and SJJPA collaborated to develop a midlife overhaul of the F-59 locomotives, overseen by SJJPA.

Additionally, with the SC-44 Charger locomotives entering their first year of major LCPM activities, work will begin to overhaul engines, trucks, and braking systems.

Legacy Fleet

SJJPA plays an advisory role for the Bi-level Legacy Fleet Modernization program led by Caltrans. The program aims to improve and modernize the aesthetics and functionality of the legacy fleet. SJJPA has developed a project plan for the modernization initiative designed to extend the service life of the legacy fleet by at least 15 years, ensuring continued operation through 2043. The initial scope encompasses 51 California bi-level cars, with workstreams addressing deferred maintenance, state of good repair restoration, and customer-focused refurbishment. For this work, SJJPA is recommending that the program be structured in three phases – initiation, pilot vehicle, and serial production – with a preliminary completion target of February 2030 at an estimated cost of \$1.4 million per coach car in today's dollars. The scope is still in development; however, some of the potential enhancements include the following:

- Floor heater and heater wiring repairs
- Seat cushion reupholstery and covering replacement
- Seat frame and slide mechanism refurbishment
- Passenger information systems
- Interior panel repairs and clean-up
- Restroom refurbishment including plumbing and appliances
- Fresh and waste water systems
- Floor / Carpet replacement
- Side entrance and car to car end doors
- Exterior livery, branding, and decals
- Sub-Flooring replacement (as needed)
- Window coverings (Shade or modern curtain material that is easy to clean)
- Stair covering and bull-noising replacement
- Lights to LED upgrade

Over the next year, \$6.4M would be required for SJJPA to begin the multi-year modernization program on the legacy fleet. The work includes engineering studies for planned modernization and procurement of components such as diaphragms and coupler systems. The coordination of these efforts will create greater efficiency, increase fleet availability, and reduce costs.

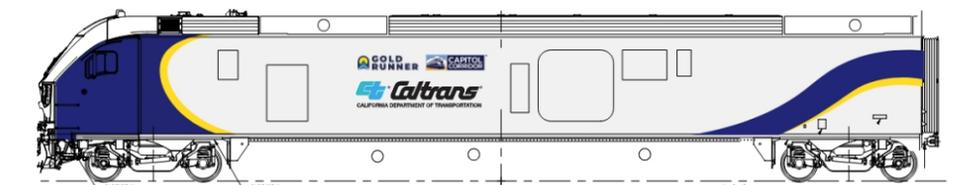
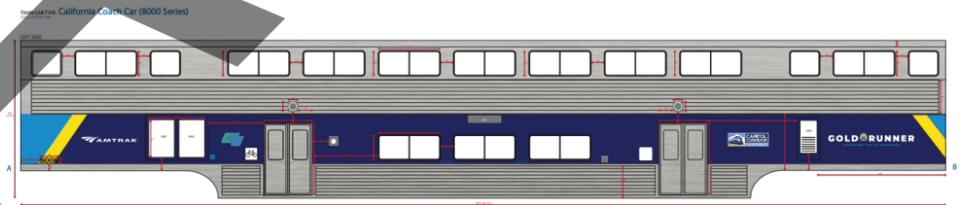
Zero Emission Intercity Rail Fleet Transition

Caltrans aims to transition its entire intercity passenger rail fleet to zero-emission (ZE) technology, utilizing hydrogen-hybrid and battery-electric trains. The strategy focuses on purchasing new ZE rolling stock and converting existing diesel locomotives to cleaner fuels. In partnership with Caltrans, SJJPA will continue to look for ZE locomotive solutions for the future Gold Runner service.

Gold Runner Service Enhancements

Caltrans is working with SJJPA on initiatives to improve performance and reliability of the fleet, such as truck overhaul, a vending service, and a modernization program in coordination CCJPA and LOSSAN to ensure consistency among all intercity services.

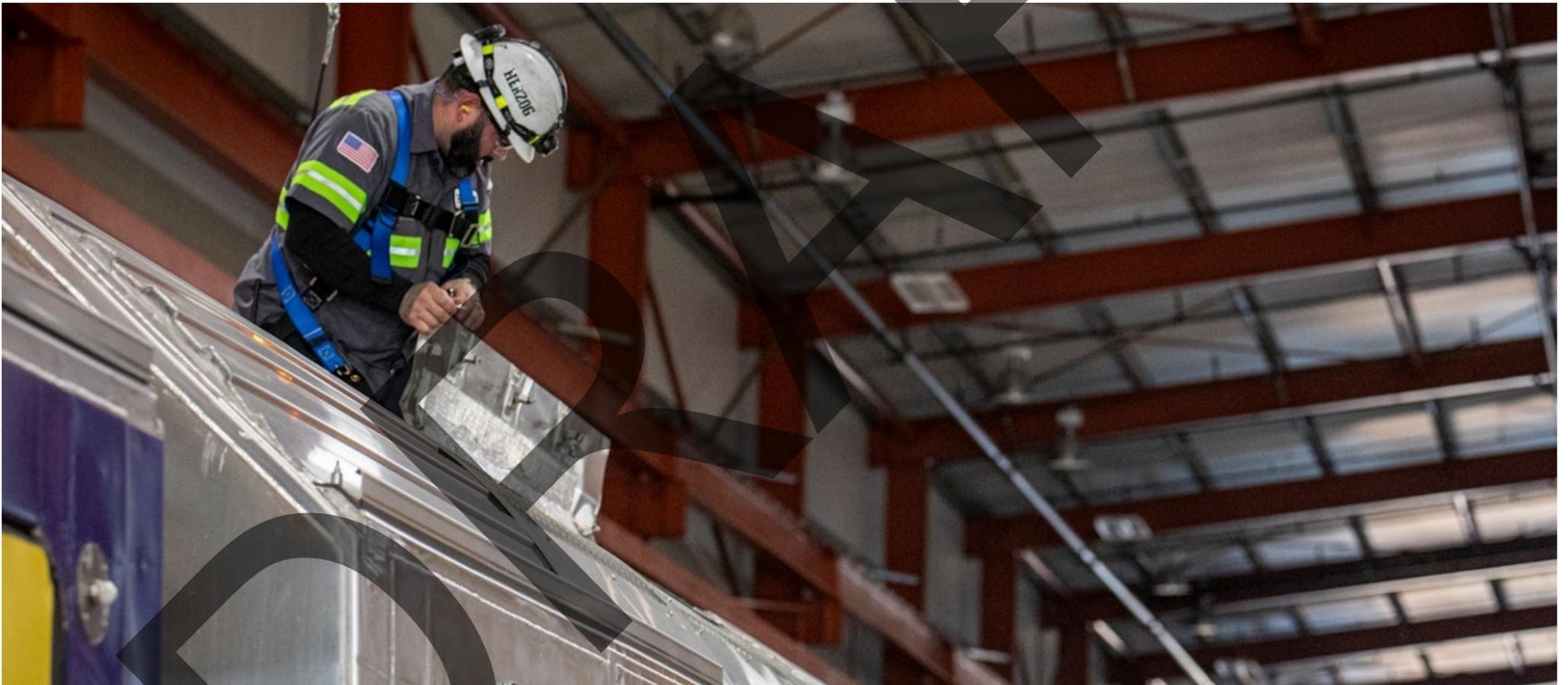
The State-procured Siemens Venture cars are near completion and in the final close-out phase of the project. It is anticipated that the last cars will be made available to SJJPA in March 2026. Once all 49 cars have been accepted, the Gold Runner will have seven trainsets with seven cars each including the cab car with limited seating and checked baggage storage.



With the recent delivery of the Venture cab cars, additional storage will be made available on the train pending a design change for the luggage racks that need to be re-evaluated for ergonomics as well as to install a permanent gun storage solution. An additional issue that is still impacting Gold Runner service, as well as overall equipment availability, is the loss of shunt issue identified during the Cab car 238.111 test. This is a critical safety feature that allows for communication between a train that is in service and signals at crossings. Until this issue is resolved, the Venture Cab cars are unable to operate in lead position, and the augmented solution is to use a bi-level cab car at one end of the train consist. SJJPA is working with its partners and operator, Amtrak, to find a solution that can effectively address the loss of shunt.

Maintenance and Material Storage

Bi-level cars parts and materials are stored primarily at the OMF, while the Venture cars' parts and materials are stored at the RMF. With the mechanical transition, to ensure ongoing access to materials at the OMF, a lease agreement between Caltrans and UPRR is required. Also, access to the Amtrak-controlled shop is restricted, and work is being conducted only in designated areas. SJJPA is exploring short and long-term solutions to be able to address the current and future material storage and workshop needs. SJJPA is investigating material storage locations in the West Oakland area to serve as a nearby alternative location, should the lease not be executed between Caltrans and UPRR. Annual costs for an alternative storage location are projected to be between \$1.8M and \$2.5M, which would include moves of material between the OMF and storage location. Should SJJPA lose the storage location at OMF, SJJPA would not be able to support service on either Gold Runner or Capitol Corridor for several months while an alternative location can be identified, secured, and mobilized with additional staff and required equipment, such as material handling trucks and storage systems.





STATION AREA DEVELOPMENT AND CONNECTIVITY

Station area development and multimodal connectivity are critical to maximizing the value of Gold Runner service and supporting long-term ridership growth. Concentrating housing, employment, and services near stations strengthens access to rail, reduces vehicle travel, and supports more efficient land use patterns. Well-connected stations also improve equity by expanding access to reliable transportation for communities that depend on transit for daily mobility.

While land use authority resides with local jurisdictions, SJJPA plays an active role in advancing station-area development and connectivity by aligning service planning, capital investments, and partnerships to support transit-oriented outcomes. In SFY 2026/2027, SJJPA's efforts will focus on advancing targeted station area planning, improving first- and last-mile connections, and coordinating with local, regional, and state partners to ensure Gold Runner stations function as effective multimodal hubs.

SFY 2026 and 2027 Station Area, Connectivity, and TOD Focus

During SFY 2026/2027, SJJPA will prioritize planning and coordination activities that support near-term service delivery and long-term growth. This includes working with local governments to advance station area plans, supporting grant-funded planning efforts that encourage transit-supportive land uses, and ensuring new or upgraded stations are designed to accommodate multimodal access. SJJPA will also continue integrating station planning with broader rail and bus network investments to improve usability, safety, and connectivity.

Sacramento Area Initiatives

In the Sacramento region, SJJPA will continue advancing station area planning tied to Valley Rail and Gold Runner expansion. This includes completing the Del Paso Multimodal Transportation Network and Land Use Compatibility Action Plan, which focuses on safety, connectivity, and transit-supportive development around the planned Old North Sacramento Station and adjacent light rail stations. Work on this effort will be completed during SFY 2026/2027 and will inform near-term improvements that support future rail service.

SJJPA will also continue participating in Sacramento Valley Station planning efforts led by the City of Sacramento to ensure Gold Runner and Valley Rail operational needs are reflected in station and surrounding area development. Coordination will remain focused on maintaining access to the station, improving passenger circulation, and preserving future rail connectivity opportunities that support expanded Sacramento service.

Stockton Area Initiatives

In Stockton, SJJPA will continue supporting station area development and connectivity improvements around both the Cabral

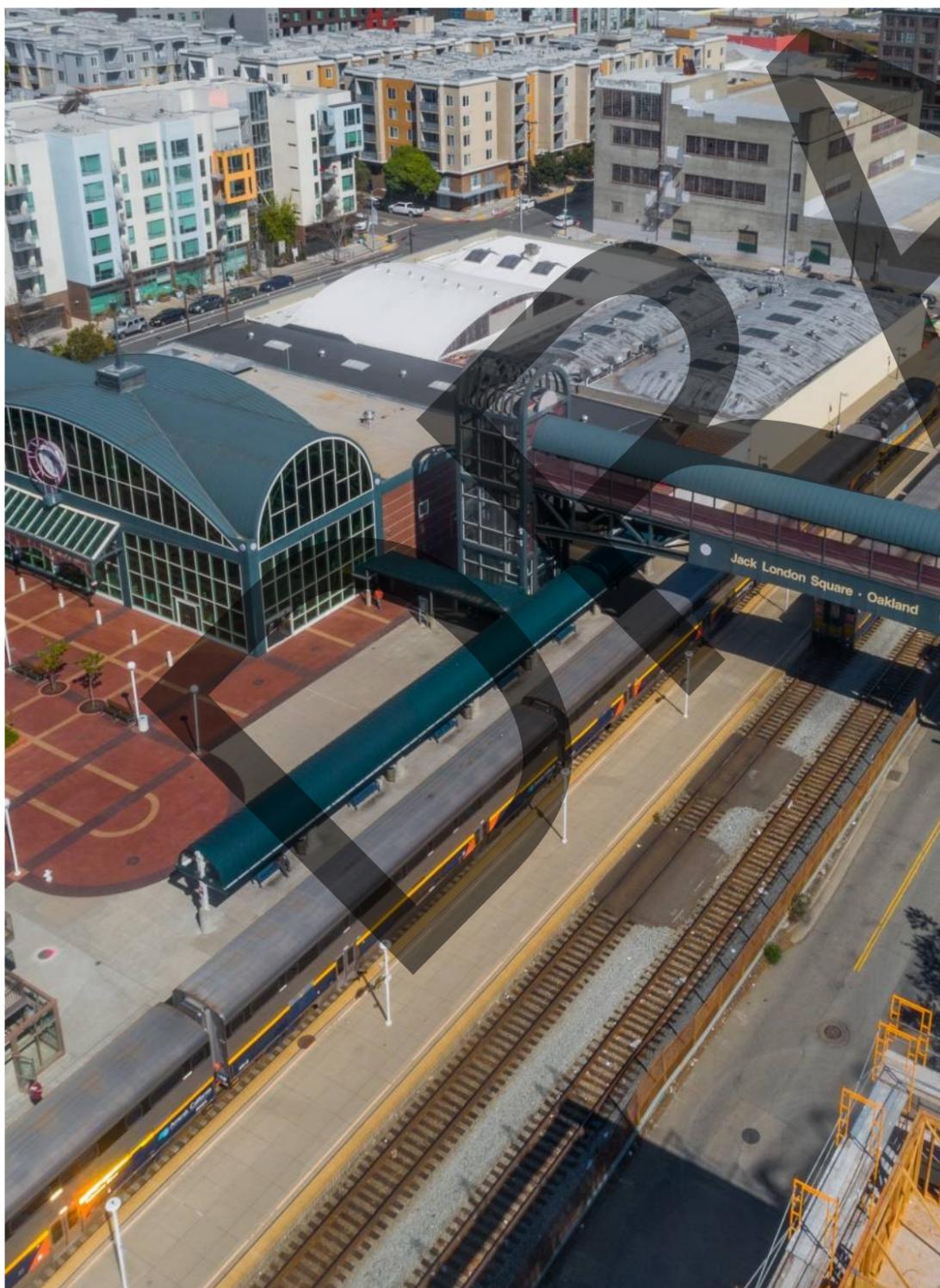
Station and San Joaquin Street Station. During SFY 2026/2027, SJJPA will participate in the MOVE Downtown planning effort led by the City of Stockton, which is advancing transit-oriented development, walkability, and multimodal access in downtown Stockton. This work is expected to strengthen station access, support ridership growth, and improve the integration of rail, bus, and active transportation networks.

San Joaquin Valley Network Integration and TOD Action Plan

SJJPA will continue leading development of the San Joaquin Valley Network Integration and TOD Action Plan, funded through a Caltrans Sustainable Transportation Planning Grant. During SFY 2026/2027, this effort will focus on coordinating with regional transportation planning agencies to identify priority transit connections, improve schedule and fare integration, and align land use planning with existing and future rail and bus services. The action plan will serve as both an implementation guide and a communication tool that highlights the State's investment in rail and transit while supporting climate, equity, and economic development goals. Completion of the action plan is anticipated by the end of SFY 2026/2027.

Regional Coordination and Corridor Integration

SJJPA will continue coordinating with regional partners to strengthen connecting transit services that support Gold Runner ridership. This includes participation in Cross Valley Corridor planning to support phased implementation of intercity bus service and future rail connectivity, continued coordination with local transit operators to improve timed connections and service reliability, and engagement in regional rail studies and long-term planning to ensure consistency with valley-wide network integration efforts. These activities will focus on near-term improvements that enhance access to Gold Runner while laying the groundwork for future expansion.





GOLD RUNNER UNIFORM PERFORMANCE STANDARDS

Performance for the Gold Runner service is captured in the tables that align with prior years reporting for consistency; however, to create better alignment between Caltrans and the three intercity passenger rail services—Capitol Corridor, Gold Runner, and Pacific Surfliner—SJJPA has provided an additional performance view that focuses on the state’s Uniform Performance Standards (UPS).

State Fiscal Year 2025 Annual Operating Performance

The following tables offer the high-level key performance indicators that SJJPA works to improve each year; individual route performance; as well as top performing city-pairs that are represented with and without Thruway Bus figures. Year-over-year Gold Runner performance for FY24/25 is relatively flat from the prior year, with a slight increase in revenue and ridership in addition to a slight reduction in expenses.

Ridership Performance	Ridership		Passenger-Miles per Train Mile	
		908,860		96.1
Financial Performance	Revenue	Expense	Subsidy	Farebox Ratio
	\$31,579,881	\$98,473,785	\$66,893,904	32.07%

Table UPS.1 Source: Amtrak, 2025 [Jul24-Jun25]



Gold Runner Thruway Bus Route Ridership - FY25

Thruway Bus Route		Ridership
Route 1*	Fresno - Bakersfield - Los Angeles - Santa Ana - San Diego	254,317
Route 1C	Bakersfield - Van Nuys - Santa Monica	32,899
Route 3	Stockton - Sacramento - Chico	153,403
Route 3R	Chico - Redding (RABA)	4,616
Route 6	Stockton - San Jose	27,043
Route 7	Martinez - Napa - Santa Rosa - Eureka - Cal Poly Humboldt/Arcata	46,809
Route 10	Las Vegas - Bakersfield - Oxnard - Santa Barbara	32,280
Route 15A/15B	Merced - Mariposa - Yosemite Valley / Fresno - Yosemite Valley (YARTS)	4,566
Route 18	Visalia - Hanford - San Luis Obispo - Santa Maria	10,623
Route 19	Bakersfield - Riverside-San Bernardino	41,705
Route 56	San Jose - Stockton	8,846
Route 99	Emeryville - San Francisco	42,758
Total Ridership		626,966

Table UPS.2 Source: Amtrak, 2025 [Jul24-Jun25]

The above figures are total on/off (boardings/alightings) for each bus route and include 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 (1A and 1B) which serve locations within the Los Angeles Basin and the Greater Southern California region. Route 1C ridership is included within Route 1 total.

Gold Runner Train Station Ridership Report - FY25* (With Thruway Bus Transfers)	
Station	On/Offs
Bakersfield	375,804
Fresno	302,826
Stockton (San Joaquin St.)	274,097
Merced	135,352
Hanford	121,466
Modesto	105,892
Emeryville	99,879
Martinez	92,206
Oakland	67,034
Richmond	43,705
Antioch	35,665
Sacramento	33,379
Turlock-Denair	31,948
Madera	25,460
Wasco	23,534
Corcoran	22,188
Stockton (Downtown)	4,974
Lodi	2,767

Table UPS.3
Source: Amtrak, 2025.

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

Gold Runner Train Station Ridership Report - FY24* (Without Thruway Bus Transfers)	
Station	On/Offs
Fresno	310,301
Merced	128,785
Bakersfield	128,070
Hanford	121,129
Stockton (San Joaquin St.)	114,591
Modesto	102,155
Oakland	64,984
Emeryville	54,074
Martinez	52,669
Richmond	43,516
Antioch	33,695
Sacramento	32,626
Turlock-Denair	30,758
Madera	26,533
Wasco	24,399
Corcoran	21,775
Stockton (Downtown)	4,917
Lodi	2,679

Table UPS.4

**Gold Runner City Pair Ridership – FY24
(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

Table UPS.5 Source: Amtrak, 2024.

**San Joaquins Ridership at Key Thruway
Bus Stops – FY25**

Bus Stop	On/Offs
Los Angeles (Union Station)	196,251
Sacramento	153,656
San Francisco	46,602
Chico	28,933
San Jose	27,986
Riverside	14,525
Santa Rosa	12,975
San Diego	9,841
San Bernadino	8,925
Burbank	7,309
UCLA/Westwood	7,233
Eureka	6,102
Pasadena	5,871
Arcata	5,412
Yosemite Valley*	3,846
Anaheim	1,926

Table UPS.6 Source: Amtrak, 2025

*Aggregate of all Yosemite Valley bus stops

The above figures are total ons (boardings) and offs (alightings) at each bus stop.

Federal Fiscal Year 2025 UPS Performance

Working in partnership with Caltrans (the Department), SJJPA has adopted a permanent, outcome-oriented UPS framework that retains key performance indicators to measure individual route performance year over year, in addition to establishing benchmarks that compare one route’s performance to another. Historically, the Gold Runner service has been challenged with meeting all the UPS standards due to structural challenges within the corridor. There are some areas, however, such as passenger miles and operating expense by passenger miles, where the Gold Runner has come close to or exceeded goals for Federal Fiscal Year (FFY) 2025. Farebox recovery and OTP standards continue to be a challenge, directly related to the vastness of its territory which serves many disadvantaged communities, as well as operating on two very busy railroad corridors that can experience extensive delays. Near- and long-term strategies are being advanced to improve each Uniformed Performance Standard beyond FFY2025 found in Table UPS.7.



FFY2025 Gold Runner Uniform Performance Standards

Gold Runner	UPS Goal	FFY25	IPA Modifier	FFY25 + IPA*
Usage	132,353,828	128,717,938	7%	137,728,193
Passenger Miles				
2024 Population Growth 0.83%				
Cost Efficiency				
Farebox Recovery	50.00%	31.87%	11.25%	43.12%
Operating Expense/Passenger Mile	\$0.51	\$0.84	\$(0.18)	\$0.66
Service Quality				
AVG End Point OTP2	83.00%	67.09%	-	67.09%
AVG Station OTP1	83.00%	72.02%	-	72.02%
Operator Delay Minutes/10,000 Train Miles	<325 minutes	354 minutes	-	-

Table UPS.7 *Individual Performance Adjustments

1 Average population growth for counties served along the rail corridor from 2024 US Census. UPS goal is prior year Passenger Miles factored by the population growth.

2 UPS sets the on-time performance goal at 90% for End Point and All-Stations OTP; however, SJJPA has established an adjusted goal that is targeted to be achievable in the near-term.

Adaptation of UPS for the Gold Runner

The characteristics of each intercity passenger rail service can vary significantly by route, making it challenging to achieve UPS standards uniformly. SJJPA is committed to maintaining a service that is affordable and accessible to the communities served by the Gold Runner; however, to achieve co-equal efficiency and effectiveness requires agencies to balance the optimization of operations alongside the goals for overall utilization of the service. This necessitates prioritizing the needs of the riders, operational partners, or capital project improvements alongside strategies that drive results for Gold Runner passengers and the quality of the service. In consideration of this, SJJPA has developed an approach that provides an additional way to measure its performance by incorporating Individual Performance Adjustments (IPA) to the UPS, thereby calibrating route performance with adaptive benchmarking to deliver parity and consistency. IPA factors act as modifiers to UPS scores by assessing how well SJJPA was able to deliver a service that responds to route characteristics such as population demographics, economic positioning of its communities, as well as regional commitments to expand service to disadvantaged communities. SJJPA's IPA composition is derived from sources that provide historical and current statistical reporting that can be used continuously to monitor performance.

How We Apply Individual Performance Adjustments (IPA)

To provide a more holistic assessment of the Gold Runner's performance, SJJPA has established an Individual Performance Adjustment (IPA) process. Each UPS category—Usage, Cost-Efficiency, and Service Quality—is broken down into key factors that best represent the conditions and priorities of its route. These factors are assigned percentage weights to reflect their relative importance, and each is evaluated on how effectively we performed using a simple scale:

- **Achieved (25%)** – goal fully met or exceeded
- **Mostly Achieved (12.5%)** – partial or near completion
- **Did Not Achieve (0%)** – goal not met this cycle

This allows for an account of unique service characteristics—such as the size of the corridor, market diversity, and community needs—while still maintaining consistency with the Department's overall performance within the Uniformed Performance Standard (UPS) framework.

Northern California Intercity Rolling Stock

Usage		Cost-Efficiency		Service Quality	
Load Factor	75%	Fares	50%	Congestion/ Interference	25%
Thruway Bus Routes	20%	Food & Beverage	10%	Environment (Route Length/Climate)	25%
Passenger Experience	5%	Markets Served	20%	Equipment Reliability/ Utilization	25%
		Rider Demographic	20%	Rail Safety/ Grade Crossings/ ROW Cleanup	25%

Table UPS.8

Example:

Under the Cost-Efficiency standard, the Department sets a goal of a 50% farebox recovery ratio. Before any IPA adjustments, the Gold Runner route achieved 31.87%, reflecting the challenges of serving a very large corridor with high concentrations of disadvantaged communities, seniors, and students. Because maintaining affordable fares and equitable access is a core priority, the IPA for Cost-Efficiency is weighted to reflect this balance:

- Fares – 50%
- Food & Beverage – 10%
- Markets Served – 20%
- Rider Demographics – 20%

For this reporting period, SJJPA mostly achieved in all areas except Food & Beverage, which we did not achieve. When these weighted factors are applied, they create an adjusted performance score that better represents both measurable results and the context behind them.

FFY2025 Gold Runner Uniform Performance Standards

Cost-Efficiency	IPA Factor Score	Calculation	Score Modifier
Fares – 50%	12.5% (Mostly Achieved)	50% * 12.5%	6.25%
Food & Beverage – 10%	0.0% (Did Not Achieve)	10% * 0%	0.00%
Markets Served – 20%	12.5% (Mostly Achieved)	20% * 12.5%	2.50%
Rider Demographics – 20%	12.5% (Mostly Achieved)	20% * 12.5%	2.50%
Total IPA Modifier			11.25%

Table UPS.9

The adjusted outcome recognizes that while farebox recovery remains below the state target, SJJPA is successfully advancing equity, access, and community value—key priorities that must be balanced alongside financial efficiency, arriving at a final farebox recovery score of 43.12%.

SJJPA has identified a number of projects and initiatives which are identified throughout this Annual Business Plan and are focused on addressing challenge areas for the service with a goal of demonstrating higher uniformed performance standards in future years.



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 FY24/25 State budget that continues this support.

The primary purpose of this Business Plan is to request the annual funds required by SJJPA to operate, administer, and market the Gold Runner for agreed-upon service levels. Also contained in the request are activities that directly support operating expenses for Capitol Corridor and were historically contained in the respective Amtrak Operating agreements. This chapter documents ridership and revenue projections; FY24/25 financial results (actuals); operating, marketing, and administrative funding requests of SJJPA for FY26/27 to FY27/28. The FY26/27 plan identifies the various ongoing multi-year service and program initiatives for FY26/27 and those anticipated for FY27/28. See Table UPS.4 for a summary of service and program initiatives.

SJJPA acknowledges the limited financial capacity of the State and remains committed to providing the highest return on investment possible for the resources provided, while positioning the Gold Runner service for long term growth and improvements in cost efficiency for the intercity program.

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.

Ridership and Revenue Actuals and Forecasts (FY25 - FY27)				
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%

Table AFR.1

FY 2024/25 Operating Fiscal Report (Actuals)

The net operating costs (expenses less revenue) for Amtrak to operate the San Joaquins for FY24/25 was \$58,745,226 for 6 round trip service levels, which was satisfied with the allocation for FY25. The other operating costs incurred outside of Amtrak contract for FY24 were \$17,475,985 for maintenance of State-owned equipment, station leases, insurance, and host right-of-way maintenance projects.

Other Operations Funding Request (FY 2026/27 and FY 2027/28)

The FY26/27 Other Direct Operations request represents a continuation of multi-year initiatives that have successfully advanced and now represent core components of the Gold Runner service, as well as the Capitol Corridor service. The full transition of the Northern California mechanical program has been completed, access agreements and insurance obligations have been fully assumed, supplemental equipment leases to improve service reliability are in final stages, and the rebranding effort is well underway. The comprehensive list of items included in Other Operations are below:

Other Direct Operations Budget (FY26/27 - FY27/28)		
Expense Category	FY 26/27 (Requested)	FY 27/28 (Projected)
Connecting Services	\$75,000	\$75,000
Contingent Railroad Liability Insurance	\$4,410,132	\$4,498,335
Equipment Repair Fund	\$500,000	\$500,000
Host Railroad Maintenance of Way	\$500,000	\$500,000
Maintenance of Equipment Program (State-Owned/Leased)	\$41,045,000	\$41,045,000
On Board Passenger Services Program	\$3,900,000	\$3,900,000
Other Direct Operations Costs	\$2,751,247	\$2,806,272
Station Lease and Facilities Expense	\$331,200	\$337,824
Service Rebranding and Signage	\$300,000	\$300,000
Yard Operations Expense	\$1,525,320	\$1,555,826
Total Other Operations	\$55,337,899	\$55,518,257

Table AFR.2

FY24/25 Administrative Fiscal Report (Actuals)

The net administrative costs for SJJPA to manage and administer the San Joaquins for FY24/25 was \$5,356,017.

Administrative Funding Request (FY25/26 and FY26/27)

Funds are required for the SJJPA to provide administrative functions for the San Joaquins. For FY25/26, SJJPA administrative costs are estimated at \$6,740,047, which is unchanged from FY24/25. While various initiatives and joint efforts between SJJPA and the State have evolved to account for the steady increase within key areas of administration, the resources at this time are considered to be appropriate for the future years. See Table AFR.5 for a summary of these administrative costs alongside operations, marketing, service and program initiative costs. See Table AFR.3 for a summary of budgeted administrative costs



Administrative Budget

Expense Category	FY26/27 (requested)	FY27/28 (projected)
Salaries/Benefits/Contract Help	\$4,268,517	\$4,268,517
Administration - Procurement & Contracts	\$31,410	\$31,410
Office Expenses/Postage/Memberships, etc.	\$53,724	\$53,724
Computer Systems	\$20,000	\$20,000
Communications	\$5,000	\$5,000
Motor Pool	\$19,250	\$19,250
Transportation/Travel/Engagement	\$75,000	\$75,000
Training	\$12,000	\$12,000
Audits/Regulatory Reporting	\$47,580	\$47,580
Professional Services - Legislative	\$480,508	\$480,508
Professional Services - Legal	\$167,280	\$167,280
Professional Services - General	\$440,650	\$440,650
Information Technology, Software Integration & License Fees	\$58,430	\$58,430
Professional Services - Operations	\$128,000	\$128,000
Professional Services - Grants & Programming	\$125,052	\$125,052
Professional Services - Planning	\$150,000	\$150,000
Communications - Operations	\$16,000	\$16,000
Publication/Legal Notices	\$12,500	\$12,500
Maintenance of Headquarters	\$221,424	\$221,424
Insurance - Administration	\$276,656	\$276,656
Insurance Management Fees	\$10,000	\$10,000
Security Services/Safety Programs	\$121,066	\$121,066
Total Administration	\$6,740,047	\$6,740,047

Table AFR.3

Marketing Funding Request (FY25/26 and 26/27)

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 amount is consistent with the FY24/25 request. See the Marketing, Public Relations, and Outreach summary for additional information.

Minor Capital Funding Request (FY25/26 and FY 26/27)

SJJPA is requesting \$500,000 per year provided for "Minor Capital" projects (projects valued at \$388,000 or less in total project cost) for FY26/27 and FY27/28. This amount is consistent with the FY24/25 request. See the Safety and Security Program summary for additional information.

Gold Runner Service and Program Initiatives

In addition to direct current service costs, SJJPA, in coordination with Caltrans and CalSTA, are requesting the following resources to continue the following multiyear service initiatives. See Table AFR.4 for Gold Runner Service and Program Initiatives.

Gold Runner Service and Program Initiatives Budget

Expense Category	FY26/27 (requested)	FY27/28 (projected)
Marketing Analysis	\$300,000	-
High Speed Rail/Early Train Operator Coordination Support:		
- Business Class Study	\$1,723,356	\$1,792,290
- Grants Support	\$150,000	\$150,000
- Operational Preparedness	\$250,000	\$250,000
- Service Plan Coordination	\$250,000	\$250,000
- Ticketing Integration	\$350,000	\$350,000
Total SJJPA Service and Program Initiatives	\$3,023,356	\$2,792,290

Table AFR.4

The SJJPA State Funding request for FY26/27 and FY27/28 for all categories is presented below.

SJJPA State Funding Request		
Expense Category	FY26/27 (requested)	FY27/28 (projected)
Operating		
- Amtrak Contract	\$47,452,929	\$48,876,517
- Operations Controlled Equipment Maintenance of Equipment Program (State-Owned/Leased)	\$41,045,000	\$41,865,900
- Other Operations	\$12,542,899	\$12,688,257
- Administrative	\$6,740,047	\$6,740,047
- Marketing	\$1,750,000	\$1,750,000
- Minor Capital Program	\$500,000	\$500,000
- SJJPA Service and Program Initiatives	\$3,023,356	\$2,792,290
Total Request	\$113,054,231	\$115,213,011

Table ES.1/AFR.5

Budget Authority and Supplementally Funded Initiatives (FY26/27 and FY27/28)

While the Annual Business Plan outlines the funding requirements from the Public Transportation Account (PTA), SJJPA also carries out initiatives and delivers projects that receive outside funding and are presented below to provide a fully transparent agency budget.

SJJPA State Funding Request		
Expense Category	FY26/27 (Requested)	FY27/28 (Projected)
State Owned Equipment Truck Overhaul - PEA Account	\$3,437,638	\$3,437,638
State Owned Equipment Pre-Revenue - PEA Account	\$989,224	\$989,224
Corridor Identification and Development Program	\$47,000	\$361,000
San Joaquin Valley Network Integration and Transit-Oriented Development Action Plan	\$225,000	\$325,000
Third Party Budget Authority	\$4,698,862	\$5,112,862

Table AFR.6



APPENDIX

Historical Performance of the Service and Route

Gold Runner Annual Operating Performance – Federal Fiscal Years								
Federal Fiscal Year	Ridership Data		Financial Data for Operations					
	Ridership	PM/TM	Revenue	Expense	Loss	State Calculated	Amtrak Service Costs	Farebox Ratio
		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%

Gold Runner Annual Operating Performance – Federal Fiscal Years Continued.

Federal Fiscal Year	Ridership Data		Financial Data for Operations					
	Ridership	PM/TM	Revenue	Expense	Loss	State Calculated	Amtrak Service Costs	Farebox Ratio
		F1		F2		F3	F4	F5
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	-	54.0%
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	-	50.5%
2016-17	1,120,037	100.1	\$38,880,344	\$78,884,172	\$40,003,828	\$40,003,828	-	49.0%
2017-18	1,078,750	97.4	\$36,073,870	\$83,875,637	\$47,801,767	\$47,801,767	-	43.0%
2018-19	1,071,190	96.4	\$35,217,711	\$85,837,162	\$50,619,451	\$50,619,451	-	41.0%
2019-20	606,728	67.1	\$21,203,566	\$73,666,185	\$52,462,619	\$52,462,619	-	29.0%
2020-21	434,240	64.0	\$15,282,605	\$62,416,204	\$47,133,599	\$47,133,599	-	24.0%
2021-22	710,965	77.3	\$25,478,259	\$83,869,485	\$58,391,226	\$58,391,226	-	30.0%
2022-23	846,892	91.8	\$32,447,878	\$87,817,758	\$55,369,880	\$55,369,880	-	37.0%
2023-24*	909,551	97.0	\$33,900,872	\$99,408,879	\$65,508,007	\$65,508,007	-	34.1%
2024-25*	906,907	97.7	\$34,340,602	\$107,750,748	\$73,410,146	\$73,410,146	-	31.9%

Table APP1

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. For years 2019-20 and beyond cost incurred outside of the Amtrak contract are reported for Direct Operations.

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

(*) Previously reported information has been restated to reflect Uniform Performance Standard

Restated Farebox Recovery Ratio FY23-25			
Expense Category	FFY23 SJJPA	FFY24 SJJPA	FFY25 SJJPA
Operating Revenue	\$29,820,676	\$31,156,026	\$31,560,153
Thruway Revenue Attributable to Service [1]	\$2,627,202	\$2,744,846	\$2,780,449
Restated Operating Revenue	\$32,447,878	\$33,900,872	\$34,340,602
-Amtrak Operating Cost	\$86,016,874	\$94,856,982	\$89,746,411
-Direct Operations Cost	\$1,484,228	\$70,098	\$4,268,623
-Mechanical and Related Insurance Costs	\$722,260	\$7,058,561	\$16,068,551
-Intercity Technology Operating Costs	\$2,998,347	\$2,998,347	\$2,998,347
-Less Non-Operating Costs [2]	-	-	\$(1,927,232)
-Less Non-Operating Deferred Maintenance [3]	\$(3,403,952)	\$(5,575,109)	\$(3,403,952)
-Add Assignment of Operating Cost to Intercity Service	-	-	-
Total Service Operating Costs [4]	\$87,817,758	\$99,408,879	\$107,750,74
Restated Farebox Recovery Ratio [5]	36.95%	34.10%	31.87%

Table APP.2

[1] Route 39 Thruway Revenue that is recognized in other State Supported Services, but who do not share in the expense.

[2] Route 37 Equipment Utilization and Route 39 Technology Costs

[3] Route 39 Deferred Maintenance Adjustment for State-Owned Equipment maintained by Amtrak

[4] Operating Costs for Service after Adjustments, Before API Modifiers

[5] Operating Revenues divided by Operating Costs

Gold Runner 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	7.0	4.2	2.8	UP	2	50	CTC
Oakland 10th St.	2.2	2.2	31.7	29.5	UP	2	79	CTC
Martinez	34.7	34.7	41.3	6.6	UP	1	79	CTC
Port Chicago	1163.5	1163.5	1120.7	42.8	BNSF	1-2	79	CTC
Sacramento	89.0	89.0	91.8	2.8	UP	2	35	CTC
Elvas	38.8	38.8	84.7	45.9	UP	1	60	CTC
Stockton	1120.7	1120.7	886.9	233.8	BNSF	1-2	79	CTC
TOTAL				364.2				

Table APP.3 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.

Capital Programs Project List

Project Name	Description	Project Justification and Service Goals	Lead Agency	Estimated Total Project Cost
BNSF CP Lake to CP Escalon	Addition of second main track to improve reliability and enable service expansion	To achieve 8 RTs	SJRRC/ SJJPA	\$21,358,000
Madera Station (Relocation) [Phase #1]	Relocation and construction of intermodal station with future HSR connection	To increase ridership at Madera station, increase opportunities for TOD, and enable station to become HSR Rail Station (Phase 2 and 3)	SJRRC/ SJJPA	\$73,021,856
Mini-High Platform Improvements Project	Accessibility improvements for high-floor passenger cars	To allow level boarding for all Gold Runner passengers	SJJPA	\$1,994,000
Oakley Station & Track Improvements	New station construction with platforms, parking, and access improvements	To increase ridership and further growth	SJRRC/	\$8,281,000
San Joaquin Street Layover and Station	Layover facility to support expanded Stockton-Sacramento service	To increase ridership and enable the connection between Stockton and Natomas to provide rail service which replace bus service	SJJPA SJJPA	\$7,000,000

Capital Programs Project List Continued

Project Name	Description	Project Justification and Service Goals	Lead Agency	Estimated Total Project Cost
Stockton Wye	Rail connection to improve operational efficiency and capacity	To increase ridership and enable the connection between Stockton and Natomas to provide rail service which replace bus service	SJJPA	\$18,712,685
Stockton Diamond Grade Separation	Grade-separated rail crossing to improve freight and passenger efficiency	To improve OTP and remove the cap and congestion through the Stockton Diamond	SJRRC	\$520,848,249
Public Information Display System (PIDS)	Upgrade and modernization of passenger information systems	To enhance passenger experience and to increase ridership	SJRRC/ SJJPA	\$1,300,000
Station Area Improvements	Amenity, access, and station environment enhancements	To enhance passenger experience and to increase ridership	SJJPA	TBD
Station Signage and Wayfinding	Digital and static signage improvements	To enhance passenger experience and to increase ridership	SJJPA	TBD
Gold Runner Extension – Chico	Intercity corridor service development planning	Longer term service goal	SJJPA	TBD
Gold Runner Extension – Redding	Intercity corridor service development planning	Longer term service goal	SJJPA	TBD
Modesto, Turlock/Denair 2nd Platform		To achieve 8 RTs	Caltrans	TBD

Table APP.4

Safety and Security Stakeholders

Amtrak	Northern California Emergency Preparedness Task Force
Bay Area Urban Areas Security Initiative	Northern California Rail Safety Team
Burlington North Sante Fe	Regional Transit Strategies Working Group
California Public Utilities Commission	San Joaquin Multi-Agency Homeless Strike Force Team
Federal Railroad Administration	Transportation Security Administration
Metropolitan Transportation Commission	Union Pacific Railroad
National Transportation Safety Board	

Table APP.5