



SOUTHERN CALIFORNIA REGIONAL RAIL AUTHORITY

TRANSMITTAL DATE: July 18, 2008

MEETING DATE: July 25, 2008 **ITEM**

TO: Board of Directors

FROM: Chief Executive Officer

SUBJECT: Update on the SCRRA Strategic Assessment

Issue

On January 26, 2007 the Board adopted the SCRRA Strategic Assessment. This report provides an update on the assessment and documents changes and advances since adoption.

Recommendation

There is no staff recommendation. The Board of Directors may receive and file this report.

Committee Review

The Planning and Development Committee reviewed this item at their meeting on July 11, 2008 and received and filed the report.

Background

In January 2004, the Board awarded non-competitive Contract No. SP195-04 to Wilbur Smith Associates (WSA) to conduct a strategic assessment of commuter rail improvements to the Metrolink system. Over the next 2½ years, SCRRA staff, the member agencies' Technical Advisory Committee members and WSA worked together to develop the SCRRA Strategic Assessment, which was adopted by the Board on January 27, 2007. The full report is available on the Metrolink website at <http://www.metrolinktrains.com/about/?id=12>

The report provides long-term growth options for Metrolink that balance the demand for growth with the required infrastructure, operational and fiscal context in which that growth will occur. The Strategic Assessment is a conceptual plan for the development of the Metrolink commuter rail system through 2030. No funding commitment is implied for any agency. Projects or service levels will be advanced or delayed depending upon funding availability. The Assessment is a reference document for more detailed

physical and fiscal planning needed to implement the long-term direction selected by the member agencies and the SCRRA Board. During the 1½ years since the SCRRA Strategic Assessment was adopted, there have been significant changes in operating assumptions and many capital projects have been added or funded.

Operating Assumptions

Exhibit 1 shows the weekday operating plan in 2005 (the base scenario for the report) and compares the current operating plan with the projections for 2010, 2015, 2020 and 2030 from the assessment and revised projections for 2010. As shown in the table, since 2005, we have added five weekday trips. These include two Ventura County Line trains to Chatsworth and four IEOC trains. One Burbank train was eliminated as it was replaced by one of the Chatsworth trains. In the 2008-09 Budget one additional round trip is proposed for the San Bernardino Line and those trips are added to the 2010 scenario. The revised projections for 2010 are highlighted and reflect: the 2008 service levels; additions for 2008-09; the elimination of the Perris Valley Line (now projected to open after 2010); and changes in the Orange County expanded service between Laguna Niguel and Fullerton to 16 trains for 2010 and then 26 for 2015 and 2020.

Exhibit 2 shows the weekend operating plan in 2005 and compares the current operating plan with the projections for 2010, 2015, 2020 and 2030. Since 2005, we have seen significant growth in weekend service with growth from 24 to 46 trains on Saturdays and from 8 to 32 on Sundays. For all lines, this equals or exceeds the projections for 2010 with the exception of Sunday service on the IEOC which has grown from 6 summer-only trains to 4 year-round trains compared with a projection of 6 trains for 2010. The 2010 changes are highlighted in the exhibit. In addition the current plan for new weekend service on the Orange County Line is added to 2015, 2020 and 2030.

Ridership Projections

Exhibit 3 shows the ridership projections compared with 05-06 and 07-08. The projections for 2010 have been revised to reflect the lower growth experienced over the last two years on the Antelope Valley Line, higher growth on the Riverside Line (07-08 ridership already exceeds the original 2010 projection), and lower growth on the 91-Perris Valley Line due to delay in start-up of the Perris Valley Line. The ridership has not been updated for the impact of the gas crisis as we do not have sufficient data to evaluate the trends. The next Strategic Assessment update should be able to gauge the longevity of the impact.

Capital Projects

Exhibit 4 shows the 2010 Capital Projects. The costs have been updated and projects funded since the adoption of the assessment have been added. Nineteen projects have been added since the Strategic Assessment was adopted for a total of \$231.1 million in new funding of which \$53.1 million is state or other non-member funding. These new projects reflect changes in SCRRA priorities since the SCRRA Strategic Assessment was developed and include:

- 4 Sealed Corridor/safety/security projects
- 8 capacity or service expansion projects

- 1 goods movement project
- 6 station access projects

In addition, \$286.3 million in new funding has been received for 11 prior projects, of which \$205.9 million is state or other non-member funding.

Budget Impact

This report has no budget impact. As new funding is received, it is amended into the appropriate budget.

Prepared by: Joanna Capelle, Grants and Strategic Development Manager

DAVID SOLOW
Chief Executive Officer

Weekday Service Levels

Lines	2005	2008	2010	2010 revised	2015	2020	2030
Ventura County	18	20	18	20	28	34	42
Antelope Valley	24	24	24	24	32	42	46
San Bernardino	34	34	34	36	48	56	88
Riverside	12	12	12	12	22	40	46
91 Line: LA-Riverside	9	9	0	9	4	0	0
91 Line: LA-Perris			10	0	16	24	40
LAUS-Oceanside	10	10	10	10	10	10	14
LAUS-Laguna Niguel/SJCap/Irvine	9	9	16	16	16	18	44
Fullerton-Laguna Niguel	0	0	20	16	26	26	0
IEOC	12	16	20	20	24	26	40
Burbank Turn	12	11	12	11	12	8	8
TOTAL	140	145	176	174	232	278	362
Increase over 2005			26%	24%	66%	92%	159%
Increase over prior period					83%	20%	15%
Ridership	41,000	44,800	51,345		77,136	96,788	156,502
Increase over October 2005		9%	25%		88%	136%	282%
Increase over April 2008			15%		72%	116%	249%

Notes:

2010 represents current service levels except on IEOC and OC shuttles and Perris Valley

Perris Valley Line trains are extensions of the 91 Line

2010 scenarios assume Fullerton-Laguna Niguel service, and 2020 scenarios assume LA-Fullerton service.

Trains on all lines run from end to end with no turnbacks mid-route.

San Bernardino and IEOC trains start at Rialto and E Street

Fullerton-Laguna Niguel and Los Angeles-Laguna Niguel services are lines for this train count.

IEOC Line trains operate between San Bernardino and Laguna Niguel and Rialto and Oceanside on weekends

No Amtrak trains are included in the table.

Weekend Service Levels

Lines		2005	2008	2010	2010 Revised	2015 Revised	2020 Revised	2030 Revised
Antelope Valley	Sat	8	12	8	12	12	16	36
	Sun	0	6	0	6	8	12	20
San Bernardino	Sat	16	20	16	20	36	36	36
	Sun	8	14	8	14	20	20	20
LAUS-Oceanside	Sat	0	4	0	4	4	4	4
	Sun	0	4	0	4	4	4	4
LAUS-Laguna Niguel/SJCap/Irvine	Sat	0	4	0	4	4	4	52
	Sun	0	4	0	4	4	4	52
Fullerton-Laguna Niguel	Sat	0		52	0	48	48	0
	Sun	0		52	0	48	48	0
IEOC	Sat	6 summer	6	6	6	6	12	12
	Sun	6 summer	4	6	6	6	12	12
TOTAL SATURDAY		24+6 Summer	46	82	46	110	120	140
TOTAL SUNDAY		8+6 Summer	32	66	34	90	100	108
Increase over 2005 (excludes summer) Saturday			92%	242%	92%	358%	400%	483%
Increase over 2005 (excludes summer) Sunday			300%	725%	325%	1025%	1150%	1250%
Increase over Prior Period Saturday						34%	9%	17%
Increase over Prior Period Sunday						36%	11%	8%

Total Weekday Passenger Trips by Line

	2005-06	07-08	2010	2010 Revised (2)	2015	2020	2030
Ventura County Line (1)	4,144	4,408	4,642	4,642	5,760	7,274	11,485
Antelope Valley Line (1)	7,116	7,358	9,603	7,805	16,730	23,008	32,789
San Bernardino Line	11,614	12,648	13,775	13,775	20,349	25,058	41,546
Riverside Line	4,270	5,059	4,921	5,366	10,394	14,866	21,836
Orange County Line	6,184	7,072	9,583	9,583	13,066	12,803	25,356
Inland-Orange Line	4,061	4,769	5,356	5,356	5,914	5,953	11,776
91-Perris Valley Line	2,062	2,176	3,465	2,309	4,922	7,827	11,714
System Total	39,451	43,489	51,345	48,836	77,136	96,788	156,502

Capital Improvements Needed for 2010

	Costs in 2005\$	2005 Costs in 2008\$	Funding in 2008	Non-member Funds
OCTA Service Expansion				
Turnback Facility at Fullerton Station	\$ 3,629,800	\$ 4,083,031	\$ 25,000,000	
Additional Track La Palma to Fullerton	\$ 27,144,050	\$ 30,533,365	\$ -	
Relief Sidings between Anaheim Stn and La Palma	\$ 3,075,860	\$ 3,459,924	\$ 7,800,000	
Pedestrian Grade Separation at Orange	\$ 4,833,400	\$ 5,436,918	\$ 8,752,000	
Relief Sidings between Tustin and Santa Ana Stns	\$ 2,154,160	\$ 2,423,137	\$ -	
New Control Points at CP Lincoln and CP College			\$ 14,200,000	
New and respaced Signals			\$ 5,000,000	
Communications Upgrades			\$ 15,500,000	
Turnback Facility at Lag Niguel/Mission Viejo Stn	\$ 9,335,900	\$ 10,501,618	\$ 27,000,000	
Anaheim Layover Facility			\$ 16,000,000	
Orange County Grade Crossing Safety Enhancements			\$ 69,850,000	
Fullerton Parking Expansion	\$ 10,400,000	\$ 11,698,586	\$ 32,469,000	\$ 2,750,000
Station Expansions	\$ 60,000,000	\$ 67,491,840	\$ 67,491,840	
Orange Parking Expansion	\$ 26,506,200	\$ 29,815,870	\$ 29,815,870	
Tustin Parking Expansion	\$ 7,006,150	\$ 7,880,966	\$ 17,600,000	\$ 1,100,000
Laguna Niguel/Mission Viejo Parking Expansion	\$ 59,428,000	\$ 66,848,418	\$ 66,848,418	
Irvine Parking Expansion	\$ 18,875,000	\$ 21,231,808	\$ 26,879,039	
Rolling Stock (see below)	\$ -	\$ -		
Subtotal OCTA Service Expansion	\$ 232,388,520	\$ 261,405,480	\$ 430,206,167	\$ 3,850,000
Projects needed for 2010				
BNSF mainline LA-Fullerton	\$ 30,000,000	\$ 33,745,920	\$ 33,745,920	\$ 33,745,920
MOW Facility	\$ 9,000,000	\$ 10,123,776	\$ 10,000,000	
Fiber/Communications	\$ 55,200,000	\$ 62,092,493	\$ 13,414,292	\$ 9,090,436
Olive Subdivision Siding	\$ 11,624,338	\$ 13,075,799	\$ -	
White (30.3) to San Dimas (27.8) on SB Line	\$ 27,000,000	\$ 30,371,328		
Sealed Corridor	\$ 50,000,000	\$ 56,243,200	\$ 26,894,379	\$ 26,258,644
Parking Requirement	\$ 51,128,000	\$ 57,512,047		
TOTAL needed projects	\$ 466,340,858	\$ 524,570,043	\$ 514,260,758	\$ 72,945,000
Needed Improvements Already Funded				
Cars	\$ 108,176,000	\$ 108,176,000	\$ 113,676,000	\$ 36,587,000
Locomotives	\$ 13,276,873	\$ 13,276,873	\$ 13,276,873	\$ 11,653,000
Forward Facing Cameras on Locomotives			\$ 380,000	\$ 380,000
OCTA Rolling Stock for expanded service	\$ 150,100,000	\$ 145,261,083	\$ 145,261,083	
Rolling Stock Spare Parts			\$ 2,500,000	\$ 2,500,000
5th Lead	\$ 7,466,047	\$ 7,466,047	\$ 7,466,047	\$ 7,466,047
Keller Street	\$ 5,000,000	\$ 5,000,000	\$ 11,957,650	\$ 5,659,996
Platform and Track 13 at LAUS + canopies and ramps	\$ 3,000,000	\$ 3,000,000	\$ 38,335,000	\$ 35,100,000
EAMF Phase I	\$ 19,969,265	\$ 19,969,265	\$ 49,458,265	
Triple Track LA-Full + Grade seps (est shortfall at \$30 m)	\$ 87,000,000	\$ 87,000,000	\$ 244,047,080	\$ 244,047,080
EPIS + signage	\$ 2,964,000	\$ 2,964,000	\$ 5,320,014	\$ 3,049,680
Tunnel 25 Lighting and Intrusion Detection			\$ 3,000,000	\$ 3,000,000
Sealed Corridor in SB County			\$ 2,788,000	
Santa Ana Second Main Track			\$ 27,186,503	\$ 17,468,885
Santa Ana Pedestrian Bridge			\$ 8,708,127	\$ 5,500,000
Orange Depot Pedestrian Crossing			\$ 8,752,000	\$ 8,000,000
Rancho Cucamonga Pedestrian Underpass			\$ 7,232,362	
East Ontario Platform Expansion			\$ 1,794,457	
Montclair Pedestrian Underpass			\$ 4,922,811	
Pomona Station (scope to be defined)			\$ 5,215,476	\$ 2,281,931
Santa Paula Branch Rehabilitation - Montalvo-Saticoy			\$ 6,750,000	\$ 6,750,000
Antelope Valley Freight Siding			\$ 14,700,000	\$ 7,200,000
New Placentia Metrolink Station (2012-13)			\$ 16,600,000	
TOTAL FUNDED PROJECTS	\$ 396,952,185	\$ 392,113,268	\$ 739,327,748	\$ 396,643,619
TOTAL ALL PROJECTS	\$ 863,293,043	\$ 916,683,310	\$ 1,253,588,506	\$ 469,588,619
TOTAL NEW PROJECTS	\$ -	\$ -	\$ 231,079,736	\$ 53,080,816
TOTAL NEW FUNDING ON PRIOR PROJECTS			\$ 286,338,469	\$ 205,940,554