

AC TRANSIT

TRANSLINK TRANSITION PLAN

The timing for AC Transit to transition away from its current magnetic strip and paper fare media to TransLink is being planned in phases that are based on external milestones and internal assessment. Phase 1 of this process began a few months ago with the decision to eliminate the Transbay fare media as the District prepares to move to the temporary Transbay terminal.

The chart below highlights the different paper fare media that exists today, as well as the markets that are served with the instrument, and the likely phase for elimination of the paper version of the product. The chart also provides an estimate of the percentage of rides taken with passes by pass type.

Further discussion will follow as to what conditions need to be present and what obstacles need to be overcome for the completion of the phase.

Existing Fare Media	Fare Category	Primary Market	Secondary Market	Phase	Percent Rides
10 Ride Transbay Pass	Adult	Retail	None	Phase 1	3.3%
31 Day Transbay Pass	Adult	Retail	None	Phase 1	2.4%
Monthly RTC Sticker	Senior / Disabled	Retail	Social Service	Phase 2A	18.0%
10 Ride Local Pass Y/S/D	Youth / Senior/Disabled	Retail	Social Service	Phase 2A / B	3.7%
31 Day Youth Local Pass	Youth	Retail	Social Service	Phase 2B	48.7%
10 Ride Local Pass	Adult	Retail	Social Service	Phase 2C	3.7%
31 Day Local Pass	Adult	Retail	Social Service	Phase 2C	16.4%
1 Ride Adult Local	Adult	Social Service	Marketing	Phase 3	1.9%
1 Ride Adult Transbay	Adult	Social Service	Marketing	Phase 3	0.1%
25 cent Transfer	Adult	Social Service	Retail	Phase 3	1.7%
1 Ride Local	Youth / Senior/Disabled	Social Service	Marketing	Phase 3	0.2%
3 Day Pass	All	Marketing	Customer Service	Phase 4	0.1%

Phase 1

This phase is currently in process. Transbay fare media will be eliminated as of July 1, 2009. The current active tickets and passes will be turned off in our farebox / TRiM unit by October 1, 2009.

Phase 2

Phase 2 will drive the largest share of current pass users to TransLink. About 90% of the District's pass rides will be transitioned to TransLink in this phase (excludes Berkeley Class Pass, which is not on TransLink, and EasyPass programs, which are on TransLink).

This phase will have three sub-phases. While Phase 2 needs to happen along the same basic timeline to coincide with the current vendor network being dissolved, the populations and outreach effort are separate for each sub-phase. Staff believes that the Senior / Disabled and Youth transitions will take a significant marketing and outreach effort to do well.

Key concerns / critical requirements for this phase include:

- BART needs to be generally available due to patron transfers (BART to Bus).
- The TransLink third-party network needs to be able to fill gaps identified at transition.
- The Youth Card Exception Report must be in place and the youth card process working well.
- The District must have the ability to complete card exchanges in the AC Transit Oakland ticket office to serve youth and other customers.
- TransLink Customer Service must function at a higher level; TransLink Customer Service is improving, but is not yet where it needs to be.
- Trends in customer migration and satisfaction need to be assessed as favorable.
- Sufficient staff and budget resources must be allocated.

Transition Completion: BART general availability plus 9 months, or December 31, 2010, whichever is later.

Rationale: Many AC Transit patrons transfer to BART for rides. The BART to Bus transfer will not work until BART is generally available.

Phase 2A

Elimination of the RTC Monthly Sticker with transition to RTC / TransLink Monthly pass and elimination of 10 Ride Y/S/D pass.

The outreach effort for the Senior / Disabled will be significant. Based on current knowledge, AC Transit staff expects that staff-intensive (or grassroots) outreach will need to be made to hundreds of senior centers, special needs schools, and service agencies to explain how TransLink will work for them. Messaging will need to be produced in multiple languages to address the needs of the District's diverse population. Procedures for tagging the TransLink cards of patrons entering the rear door will need to be established, as well as procedures for front-

door patrons who currently use the RTC card/sticker as a flash pass and may have difficulties tagging a TransLink card.

This conversion has been started. A letter has been sent to all AC Transit RTC patrons and information has been posted on our buses regarding using RTC / TransLink functionality. A brochure has been developed and supplied to all senior centers. To date, customer transition has been slow. A focused outreach and education process is required to complete this transition.

Phase 2B

Elimination of the 31 Day Youth pass and the Y/S/D 10 ride ticket is included in Phase 2B.

Outreach and effort to produce youth TransLink cards will be significant. The transition for youth requires that each student applies for and qualifies for the card and that the card be individually registered. In addition, AC Transit will take the step to personalize the card for point-of-use verification of the card owner.

AC Transit currently services over 100 Middle and High Schools in Alameda and Contra Costa counties with both basic transit routes plus over 250 supplemental school trips. The District estimates that more than 40,000 AC Transit boardings per day are made by youth; more than 10,000 individual youth will be included in the transition to TransLink.

The start of this transition can begin once the exception report is completed and the ability to do on-site card exchanges is complete.

Phase 2C

Elimination of the current 10 Ride and 31 Day passes occurs in this phase.

Efforts to reach customers will be primarily accomplished through messaging on the web site, via email and on board the bus. Messaging will need to be produced in multiple languages to address the needs of the District's diverse population. Outreach events will be held at key transit centers.

The transition for these fare instruments was started over 2 years ago. Acceptance among patrons has been slow. A forced transition where paper fare media is eliminated can begin after BART is generally available for patrons and gaps in the retail vendor network are filled. The transition is expected to take 9 months from when BART general availability is communicated to patrons.

Phase 3

Phase 3 is the transitioning away from the fare products that serve social service agencies of all sizes. Many AC Transit passes and tickets are distributed to consumers by social service agencies. The agency sells directly to more than 200 agencies and many more that buy from the District's ticket offices and retail vendors. These passes are used to serve many of the most transit-dependent riders. Without well thought out, comprehensive plans, this phase will not succeed.

Key concerns / critical requirements for this phase include:

- Solution determined and implemented for issuing TransLink cards and value for institutional needs
 - 10 ride tickets
 - 31 Day and Monthly passes
- Determine feasibility for single ride / single ride plus transfer fare instrument (may not be TransLink)

Transition Completion: Unknown

Phase 4

Both Marketing and Customer Service needs are addressed in this phase. Today, the District has paper fare media in the form of 1 ride and 3 day passes that can be used for customer satisfaction issues or marketing and outreach. These passes are not for sale to any outside entity, but are used for internal purposes.

There is currently no TransLink solution to take the place of these passes.

Transition Completion: Unknown

Board Action Required:

The elimination of the Transbay 10-Ride and 31-Day fare media required the Board to adopt a Resolution. Before the Board acted, a public meeting for comment was held. The AC Transit Board may require public hearings before the elimination of any additional fare media.

Attachment A: RTC Outreach Outline

Passes Sold Per Month:

- RTC Monthly Pass 10,000
- 10 Ride Y/S/D 6,500

Estimated Population:

- 30,000 AC Transit RTC Cardholders
- 10,000 Additional Senior Disabled

Targeted Outreach Locations (150 locations):

- Senior Homes
- Social Service Agencies
- Senior Centers
- Targeted Schools

Estimated Outreach Costs

- Labor: (20 hours per location @ \$40 per hour) \$120,000
- Material (\$4 per person) - \$160,000
- Other Expenses (mailing, mileage, etc.) - \$40,000

Attachment B: Youth Outreach and Registration Outline

Passes Sold Per Month:

- 31 Day Youth Pass 19,000
- 10 Ride Y/S/D 2,000

Estimated Population: 15,000 to 18,000 youth

Targeted Outreach Locations: 120 middle and high schools

Estimated Outreach Costs

- Labor (outreach and card registration) - \$300,000
- Materials - \$50,000
- Other Expenses - \$70,000
- Extended Ticket Office Hours - \$20,000

Attachment C: Issue Mitigation

Issue	Milestone	Timing After Milestone
BART needs to be generally available due to patron transfers (BART to Bus).	The BART launch needs to be at a phase where customer communication and outreach have occurred regarding BART to Bus transfers and customers can use TransLink to transfer from BART to AC Transit using the Transfer.	Eliminate 10 ride and 31 day passes within 9 months
Second door reader installation on all buses	Second door readers need to be installed and working on all AC Transit buses that have second door mobility device access. AC Transit serves a large number of wheelchair patrons as well as people that use strollers and carts that enter via the second door of our newer buses.	Eliminate RTC Monthly pass within 9 months of completion of installation
The TransLink third party network needs to be able to fill gaps identified at transition.	The TransLink vendor network needs to mirror the current AC Transit vendor network where AC Transit vendors that sell more than \$5,000 in value per month have a TransLink vendor within 1/8 th of a mile where TransLink value can be added.	Eliminate 10 ride and 31 day passes within 9 months.
The Youth Card Exception Report must be in place and a facility to do on-site card replacement for Oakland Ticket Office.	Youth Card Exception Report format agreed upon and commitment to provide weekly report.	Eliminate 31 day youth pass; 12 month transition from start of production report availability.
On-site Card replacement (TOT Functionality) to support youth program and other defective card replacement.	A card replacement process that enables AC Transit to complete youth card re-issuance (lost / damaged cards) needs to be established. AC Transit would also like to have the ability to exchange a defective card for customers.	Eliminate 31 day youth pass; 12 month transition from when ability to do card exchanges is available.
TransLink Customer Service is improving, but not yet where it needs to be.	<p>Specific customer service measures need to be established and implemented. AC Transit would like to see an ongoing customer survey that outlines basic customer satisfaction (overall satisfaction, did you answer my questions). Survey should be focused on the contact, not TransLink. It should help to identify problems with answers available and policy.</p> <p>Survey could be automated voice response. Survey results should be independent of TSB. Perhaps managed by the consortium.</p>	