

Caltrain Prepaid Fare Media Plan for Transition to TransLink

Purpose

The purpose of this document is to outline the process for transitioning Caltrain customers from paper prepaid fare media to the TransLink card.

Pre-Paid Fare Media Eligible for Transition to TransLink

Ticket or Pass Type	Value	Eligibility Requirements	Transfer Rules (<i>Caltrain does not accept other fare media</i>)
Full Fare Monthly Pass*	\$66.25 to \$298.25 based on zones traveled	No eligibility requirement; good for month and until noon the first weekday next month.	Two-zone full-fare pass valid for local fare on SamTrans, VTA and Dumbarton Express. Discount provided for Highway 17 Express Day Pass.
Eligible Discount Monthly Pass*	\$33 to \$149 based on zones traveled	Seniors (65+), passengers with disabilities with ID/proof; Medicare cardholders; youth 5-17.	Same as above except for VTA, the cost of this pass must exceed the cost of a VTA Senior/Disabled or Youth Monthly Pass. If less, a three-zone Caltrain pass will be required.
8-ride Ticket*	\$17 - \$76.50 based on zones traveled	No eligibility requirement, valid for 60 days from issue.	No transfer privilege.
8-ride Eligible* Discount Ticket	\$8.50 - \$38.25 based on zones traveled	Seniors (65+), passengers with disabilities with ID/proof; Medicare cardholders; youth 17-5.	No transfer privilege.
Go Pass*	\$140 per pass for all employees; with 70-pass minimum	Annual institutional pass sold to employers; only full-time regular employees are eligible.	No transfer privileges.

* Monthly Parking Permit can be purchased with Monthly Pass, Go Pass or two 8-rides.

Schedule for Transition by Each Type of Fare Media

Once the constraints to implementation of the transition are resolved, Caltrain will begin the process of moving Monthly Pass and 8-ride Ticket customers to TransLink cards within a year's time. Marketing efforts would be aimed at transitioning both of these ticket types to TransLink, with incentives to encourage early adopters to make the switch.

The message would be communicated to riders that TransLink is the wave of the future, a universal card that can be used on the majority of Bay Area transit systems. They will be told that within a given time frame, TransLink will be the only way to purchase Monthly and 8-ride tickets. The advantages will be emphasized of having a card that is more secure than a paper ticket (because it can be registered) and that, with autoload, one need never worry about not having a ticket or enough cash. Once a customer is enrolled, the ticket can arrive (electronically) automatically. Caltrain will offer incentives, including free TransLink cards and a limited amount of e-cash, to encourage customers to switch from Monthly and 8-ride tickets during an initial, introductory phase.

Currently, prepaid tickets are available through Caltrain ticket vending machines, the Ticket-by-Mail program; at staffed stations and Caltrain headquarters, and through vendors, including Wage Works, Wired Commute, Transit Center and the Regional Transit Connection. It is important to note that many customers use commute benefit vouchers such as Commuter Checks, TranBen to purchase paper tickets, and a successful transition depends on being able to use these benefit programs easily to purchase Caltrain tickets on TransLink.

The strategy for transitioning to TransLink entails the gradual curtailment of places where customers can purchase paper tickets, beginning with the RTC. TransLink DirectBenefits will be recommended as an option for employers, as well as existing transit benefit providers. Caltrain will not enter into vendor relationships with employers. Because the hours of operation of Caltrain's two staffed stations and the San Carlos office are limited, customers with Commuter Checks and other vouchers may find TransLink a more convenient option.

The Ticket-by-Mail and Ticket-by-Internet programs would cease accepting new members once the outlined constraints are resolved and over the course of the year, the programs would gradually be phased out.

The Go Pass is an institutional pass which presents unique challenges to transitioning to TransLink since contracts with employers, which are for a calendar year, are executed toward the end of the prior year. This means, for example, that contracts for the 2011 Go Pass year will be prepared and executed by the end of 2010. Enrollment of thousands of employees at the end of the year with Go Passes is a staff-intensive process and ample lead time needs and resources need to be provided before migration of the Go Pass program to TransLink.

In addition to these issues affecting a timetable for a transition to TransLink, the Go Pass funding formula will be the subject of Caltrain analysis in coming months. If the formula were no longer based on usage, Caltrain may choose not to include the Go Pass in the TransLink program since the data obtained from tagging would no longer be relevant to pricing.

Board Actions Required to Effect the Transition

- The elimination of any paper fare media would require Board action.
- Paper 8-ride tickets are valid for multiple use, but the TransLink version can only be used by the card owner. Tariff language also would need to be changed to reflect the fact that the ticket must be validated with the stand-alone validators at stations. It also may be necessary to state that the 60-day expiration date can be extended if another 8-ride is purchased before the first one expires or all rides are used up.
- If the Go Pass is offered as a TransLink product, the tariff would require amendment as to the form of the pass (currently a sticker), as well as whether tagging is necessary for the pass to be accepted as proof of payment.
- Tariff language allows that in certain circumstances in which trains are delayed, the validity period of a ticket may be extended by the conductor or fare inspector. Provision for this to be handled by the TransLink Service Bureau, or for TransLink rides to be refunded, may be needed.
- There is no equivalent to a "passback" in the Caltrain tariff. If this provision is retained for Caltrain's launch, patrons will not be charged if they tag on and tag off within 15 minutes at the same station.

Known Constraints Limiting Transition

In order to transition prepaid paper fare media to Translink, a number of constraints need to be resolved to allow products to be offered and for passengers to accept TransLink. Following is a list of the known constraints which may delay the transition.

1. **TransLink Purchasing Fully Integrated into Ticket Vending Machines:** TransLink purchasing needs to be fully integrated into Caltrain ticket vending machines. Without the ability to add value or products through the TVMs, customers will have few choices other than opting for autoload or seeking out a vendor in a currently limited TransLink network. An add-value capacity is essential to a transition from prepaid tickets, and Cubic needs to accelerate its progress in achieving this task.
2. **8-Ride Ticket Availability:** The 8-ride Ticket is currently not available as a TransLink product, and it needs to be made available in order to transition from paper tickets.
3. **Inter-agency Transfers:** Several interagency transfers would not be available until other agencies have inaugurated TransLink. A two-zone Caltrain pass is valid as a local fare credit on SamTrans and VTA, for

example. The movement of these customers to the TransLink card will be delayed until the transit agencies are part of the TransLink program.

4. **Monthly Parking Permits:** A means of selling and fulfilling Monthly Parking permits needs to be developed. This can be accomplished when TransLink is integrated into Caltrain TVMs. Alternatively, the TransLink Service Bureau could assume the task of mailing parking permits to customers, since the TSB will have up-to-date information about who has purchased a Monthly Pass, two 8-ride tickets or has a Go Pass.
5. **Pre-tax Benefit Programs:** Easy-to-use and understand programs must be in place so riders who use Commuter Checks and other pre-tax commuter benefit programs can purchase their tickets through TransLink.
6. **Eligible Discount Tickets:** If a photo ID is required, adequate staff and budget resources must be assembled.

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