

Caltrain Go Pass Donation Program

Work Program – Legislative – Planning
Committee

November 16, 2022



Presentation Overview

- Go Pass Donation Program Overview
- Results from Phase 1 and Phase 1.5
- Plans for Phase 2
- Next Steps

Go Pass Donation Program Overview



Go Pass Donation Program Overview

Approved by Caltrain Board (01/2021 and 05/2022), the Donation Program is part of a larger package of limited time offerings for Go Pass subscribers, including:

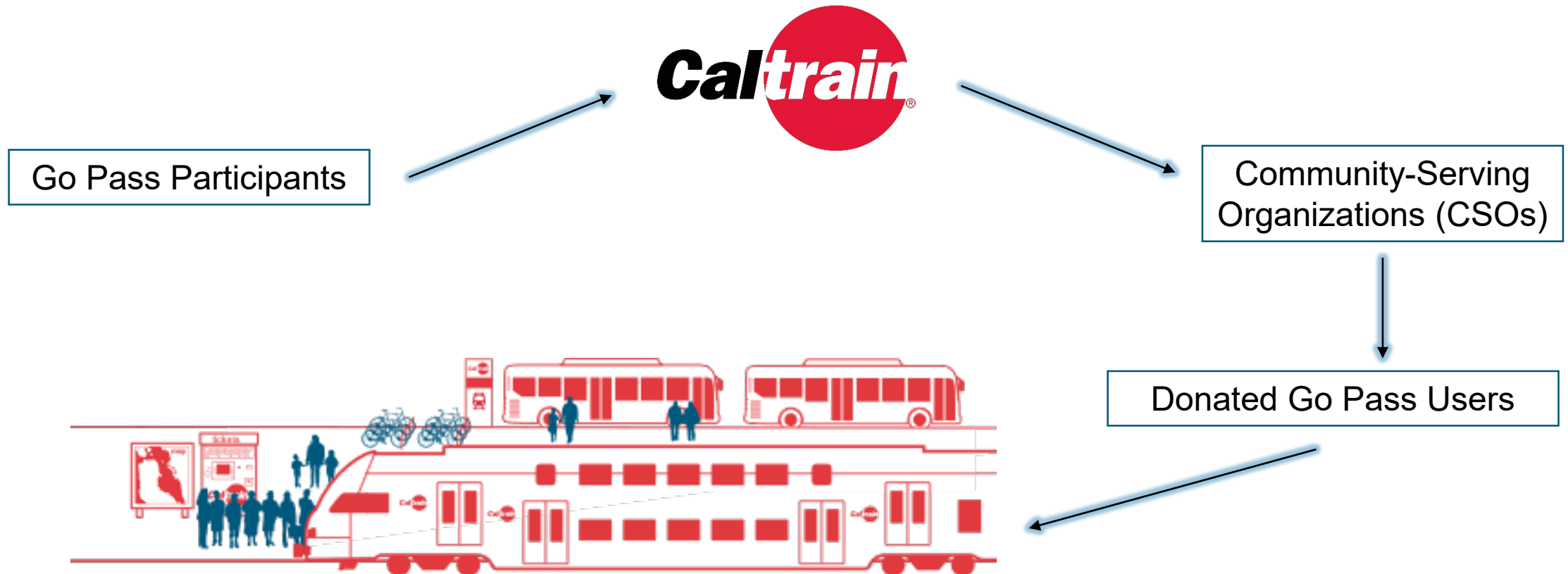
- Major cuts to the price of the Go Pass
- Benefit to 2021 subscribers of locking in an additional significant discount off 2022 rates
- Allowing participants to offer unused passes purchased for full-time employees to on-site part-time and contract workers
- Allowing companies to donate unused passes to a network of non-profit organizations (the Go Pass Donation Program). Companies may receive a tax write off for donated passes and positive publicity if desired.

Program Goals

Goals for Go Pass Donation Program:

- **Equity:** Expand and maximize access to the Caltrain system for low-income and disadvantaged riders. This may include communities of color, non-native English speakers, individuals with limited access to vehicles, and recent immigrants.
- **Ridership:** Increase Caltrain ridership, and promote regular use of Caltrain from new riders.
- **Community:** Retain current relationships and develop new relationships with corridor communities and community-serving organizations.
- **Support Go Pass Program:** Preserve as much Caltrain Go Pass participation as possible.
- **Administration:** Structure and administer program for long-term viability.

Donation Program Structure



Key Roles

Caltrain

- Manages the collection, organization, and distribution of donated passes. Clipper cards are used as proof-of-payment.
- Distributes donated passes to community serving organizations in bulk. The CSOs distribute passes to individual users.
- Measures program results and communicates positive impacts to donors, Caltrain Board, and the public.

Participants

- Donate unused passes at their discretion.
- Nominate one or more donation recipients to apply for the program, or let Caltrain choose on their behalf.

Community-Serving Organizations

- Fill out an application and identify users to receive the donated Go Pass.
- Administer the program, including card activation, distribution, and tracking.

Users

- Take the survey, activate Clipper Card, and ride the train.



Go Pass Participants

Caltrain thanks all Go Pass participants who have made a donation so far!

Benefits for Participating in Go Pass Donation Program:

- Tax write-off for donated passes
- Name recognition in press releases and Board meetings (if desired)
- Ability to nominate non-profit(s) of importance to the organization and enhance relationships with non-profit(s)
- Supporting the productive re-use of unused passes to those who may not have access to Caltrain otherwise

Details for Joining the Program:

- Caltrain invites all Go Pass participants to join the Go Pass Donation Program.
- Participants that are interested in joining the Go Pass Donation Program or would like more information may reach out to Caltrain staff at GPDP@caltrain.com.
- Any size donation of unused 2022 and 2023 Go Passes is welcome.



Community-Serving Organization Selection

Selection criteria

- 501 (c)(3) non-profit or similar entity servicing communities in the three counties
- Must designate admin to fulfill requirements of the program
- Demonstrate benefit/need of Go Pass to constituents, including users who are low-income, underrepresented, and transit-dependent

Application

- Helps eliminate bias in selection of organizations
- Asks for a description of service type, potential users and how they will benefit, estimated number of passes needed, etc.

Input from Participants

- Participating companies may nominate a community-serving organization to receive donated passes.

Program Launch Overview

Phase 1: Pilot launch (Fall 2021)

- Pilot launch utilized **700 Go Pass passes** donated by Intuit, using Clipper Cards donated by MTC.
- An initial group of **16 qualified community-serving organizations** across all three counties participated.

Phase 1.5 launch (2022)

- Due to staffing shortages, focus on continuing access to Caltrain for Phase 1 community-serving organizations.
- **388 Clipper Cards** distributed for 2022.
- **11 organizations** from the pilot signed agreements to continue participation in 2022.

Phase 2 launch (2023)

- Under development now
- Seeking to distribute at least **1,500 passes** in 2023 (expand as is feasible), drawing from current supply of ~6,000 passes
- Continue community-serving organizations from Phase 1.5 and accept applications from qualified new community-serving organizations
- Regular Go Pass participants **may donate additional unused passes (from both 2022 and 2023)** to maximize benefits and to continue supplying passes

Caltrain Staff Roles & Responsibilities

A dedicated staff team focused on operational efficiencies is responsible for the success of the program and its expansion in 2023.

Caltrain Planning: Program Management

- **Melissa Jones, Molly Sun***

Provide strategic direction, lead implementation efforts, provide updates to Caltrain Board, and oversee all coordination with Caltrain staff, community-serving organizations, etc.

Finance: Program Administration

- **Melissa Wicklow, Felila Finau, Bruce Thompson**

Lead day-to-day administration of the program, including coordination of donations, agreement finalization, Clipper portal efforts, etc.

Government & Community Affairs: CSO Engagement and Marketing Support

- **Navi Dhaliwal, Lori Low**

Lead community-serving organization engagement with application, enrollment, & implementation efforts; assist with program administration when needed; marketing materials support when needed (website, etc.)

Market Research: Program Support

- **Julian Jest, Elizabeth Wang**

Provide program support through enrollment process (Go Pass user survey), Qualtrics support, etc.

Civil Rights: Equity and CSO Engagement

- **Wendy Lau, Michelle Louie**

Provide program support from equity perspective and with community-serving organization engagement efforts



*Consultant support

Results from Phase 1 and Phase 1.5



Ridership and Trip Purpose

Metrics	Phase 1 (2021)	Phase 1.5 (2022)
Passes Distributed to Community-Serving Organizations	700	388
Total Number of Passes in Use	396 (56%)	238 (61%)
New to Caltrain	40% of GPDP Users	48% of GPDP users
Weekly Ridership	500 rides/week	650 rides/week
Trip Purpose	<ul style="list-style-type: none">▪ Commuting to work was the primary trip purpose, regardless of new or existing riders▪ 'Social/recreational' was the second most popular trip purpose	

Phase 1.5 (2022) – Impact by Community-Serving Organization

Phase 1.5 (2022) Enrolled Community-Serving Organizations	Organization Type	Passes Activated (2022)	Unique Pass Users (YTD)	Uptake Rate	Avg Weekday Daily Boardings*
Alta Housing	Housing	20	10	50%	5.6
Commute.org	TMA	75	55	73%	22.6
CORA	Support Services	8	7	88%	0.2
Five Keys School and Programs	Youth Services	28	4	14%	2.4
Manzanita Works	Workforce Development / TMA	42	26	62%	13.2
Palo Alto TMA	TMA	72	58	81%	27.7
Sacred Heart Community Service	Support Services	17	7	41%	0.1
Samaritan House	Support Services	61	29	48%	6.7
Sunnyvale Community Services	Support Services	34	19	56%	3.2
TMASF Connects	TMA	30	25	83%	22.4
Razing the Bar	Youth Services	1	0	0%	0.0
TOTAL		388	240	62%	9.5

- Transportation Management Agencies (TMAs) have been most effective in distributing passes to users who ride Caltrain

- TMAs are also contributing the most volume to weekday ridership

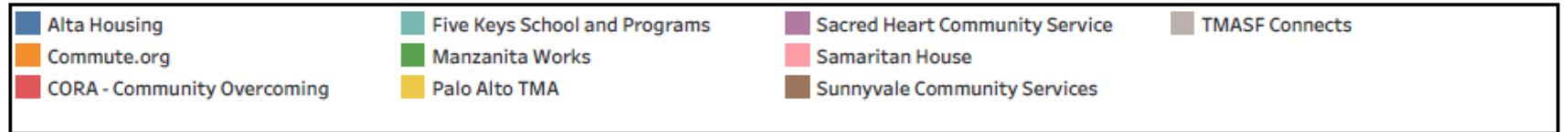
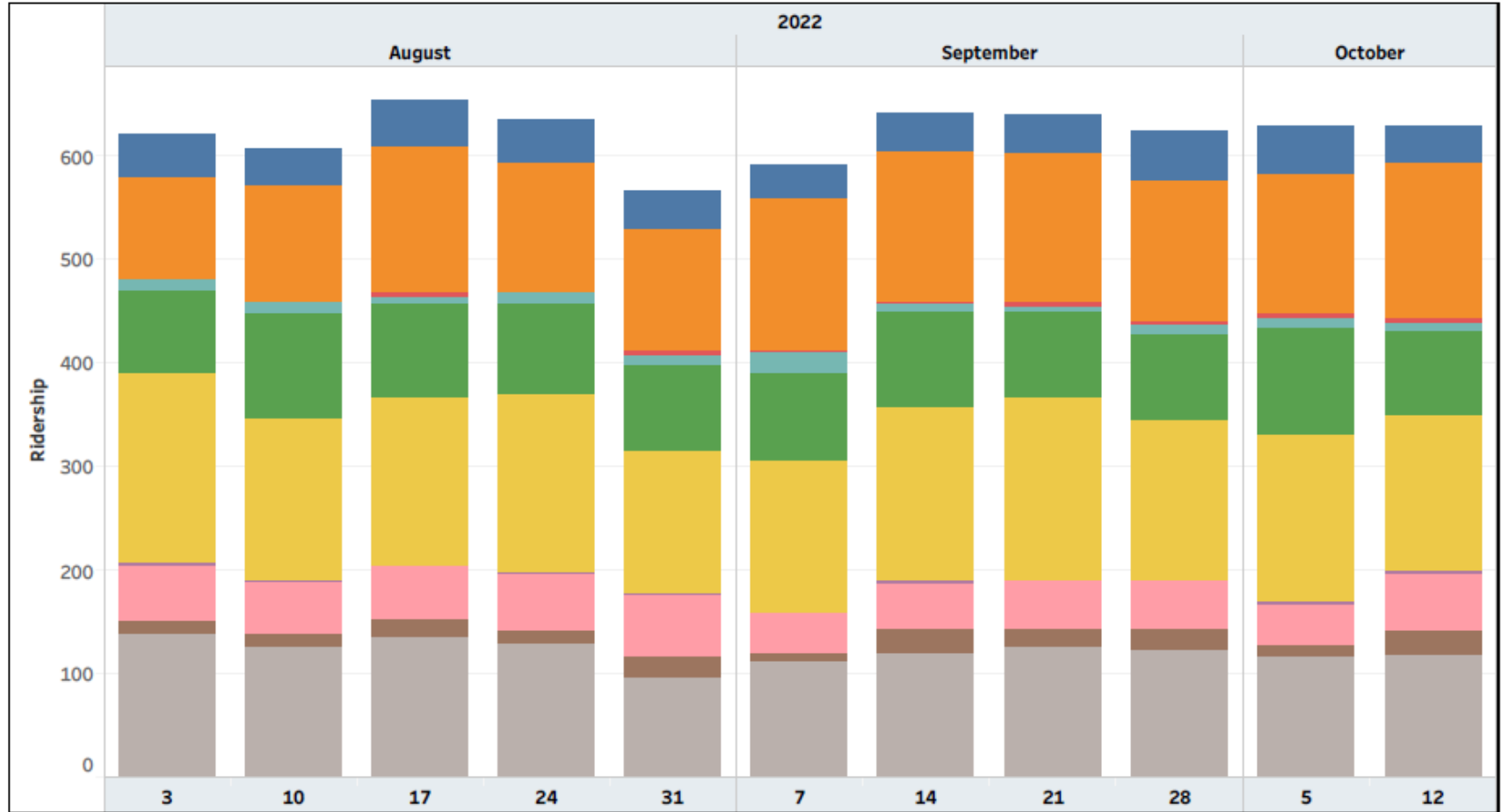
*Sample data for September 2022

Recent Weekly Ridership



GoPass Donation Program Weekly Ridership Trend

Reporting Period: 8/1/2022 to 10/31/2022
 All CBO



GPDP User Demographics

Race/Ethnicity

Go Pass Donation Program Race/Ethnicity Breakdown

There are more **Hispanic/Latino and Black/African American** riders participating in the **Go Pass Donation Program** compared to the overall 2019 Caltrain rider demographic. This number is consistent between GPDP enrollees in both 2021 and 2022.

Race/Ethnic Background	2019 Caltrain Triennial Customer Survey	2021 Regular Go Pass Program Survey	2021 Go Pass Donation Program Survey	2022 Go Pass Donation Program Survey
White/Caucasian	48%	43%	34%	22%
Hispanic/Latino	12%	8%	38%	38%
Black/African American	4%	3%	14%	15%
Asian	40%	49%	20%	16%
American Indian	1%	1%	1%	1%
Native Hawaiian or Pacific Islander	2%	1%	2%	0%
Other	1%	3%	3%	6%



GPDP User Demographics

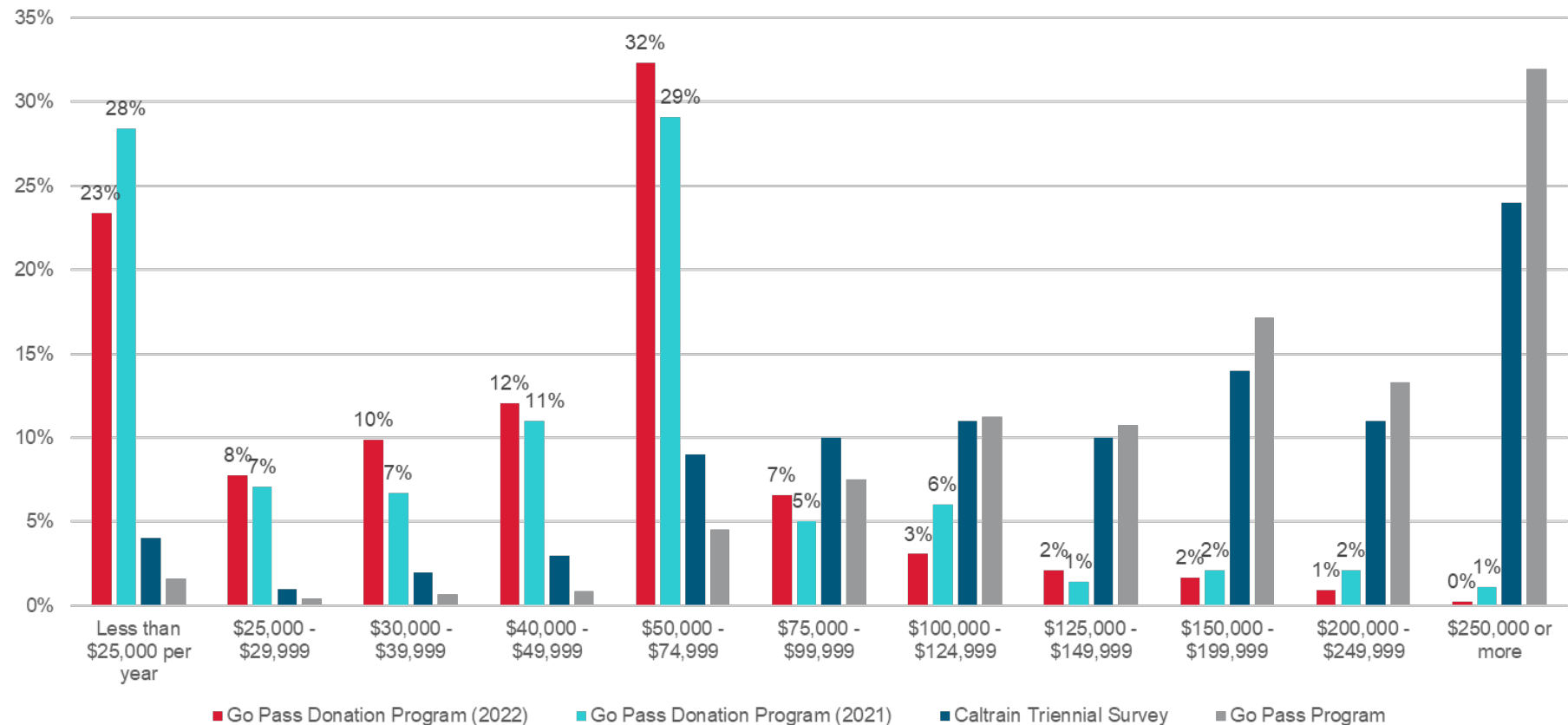
Language

- 2021 Go Pass Donation Program Survey respondents reported that they are highly fluent in English, with 93% speaking English well or very well
 - 33% speak Spanish at home, with 19% speaking *only* Spanish at home
- 2022 Go Pass Donation Program Survey respondents reported that they are highly fluent in English, with 90% speaking English well or very well
 - 35% speak Spanish at home, with 15% speaking *only* Spanish at home

GDP User Demographics

Annual Household Income

In Phase 1 (2021), 82% of enrollees, and in Phase 1.5 (2022), 85% of enrollees reported annual household income of less than \$75k, compared to 17% of general population of 2019 Caltrain riders



Deepening Relationships with Community-Serving Organizations

The Go Pass Donation Program enabled Caltrain to build relationships and consistently engage with 11 community-serving organizations along the Caltrain corridor, as well as provide transformative transportation services to the constituents of these organizations.

"I will say, it would be nice if this program is ever expanded... transportation continues to be one of the few needs that Samaritan House wishes we could provide to our clients on an ongoing basis."

- Samaritan House

"We have some grateful essential workers at small, local businesses who have said nice things about the Go Pass program!"

- Manzanita Works

"We've heard resounding gratitude from the employees. 'Taking the train is a game changer for me. It helps tremendously.' Others were excited to use it for recreational weekend trips to the City."

- Palo Alto TMA



Key Community- Serving Organization Trends

- Transportation Management Associations (TMAs), such as Palo Alto TMA and Commute.org, were the most successful in administering the passes, due to in-house expertise with transportation programs and their additional marketing efforts.
- Affordable housing and workforce development organizations, such as Alta Housing and Manzanita Works, also successfully distributed passes.
- Some organizations that focus on extremely low-income and/or homeless clients encountered difficulty distributing passes.
 - This is due to clients not consistently needing long-distance trips – local transportation options are a greater need for this population.
 - Samaritan House is major exception to this trend - they were able to distribute many passes.

Plans for Phase 2 (2023)



Plans for Phase 2

Phase 2 for 2023:

- Given strong interest in program and its track record of success, efforts are underway to expand program and distribute at least 1,500 passes by April 1, 2023.
- Support continued achievement of the goals for overall donation program.

Selected Example Strategies that Support Goal Achievement:

- Provide continuity of Caltrain access to riders enrolled in Phase 1.5.
- Continue to build effective partnerships with existing and new community-serving organizations.
- Enroll additional community-serving organizations that meet program criteria, prioritizing those that will maximize impact through high distribution rates.
- Support community-serving organizations by providing accessible, clear information about program enrollment, pass distribution, and use of Caltrain.
- Effectively utilize staff resources; revisit administration to identify and implement efficiencies.

Community-Serving Organization Strategy for Phase 2 (2023)

Selection Criteria for 2023 Community-Serving Organizations:

- 501 (c)(3) non-profit or public entity that serves communities in the three counties served by Caltrain.
- Must demonstrate benefit/need of Go Pass to their constituents. Recipients of CSOs' donated passes should be users who live or work along the Caltrain corridor and who are low-income or have been underrepresented in Caltrain ridership.
- Must take on administrative responsibility to fulfill requirements of the program.

Phase 2 Strategy:

- **Stage 1:** Re-enroll existing and contact nominated community-serving organizations (through Jan. 2023)
- **Stage 2:** Develop long-term marketing strategy targeted to new community-serving organizations (through January 2023), including:
 - Digital marketing campaign linked to the publicly-accessible Go Pass Application online;
 - Contracting with a partner community-serving organizations to conduct outreach to new organizations; and
 - Caltrain staff outreach to organization partners.
- **Stage 3:** Market to, enroll, and train new community-serving organizations (December – March 2023)

Next Steps



Next Steps

- Continue accepting donations of unused 2022 and 2023 passes from regular Go Pass participants.
- Re-enroll existing community-serving organizations in Phase 2 and distribute passes for use in January 2023.
- Launch marketing strategy to enroll new community-serving organizations in program in early 2023, including contracting with partner community-serving organization for outreach.
- Generate publicity for Caltrain and donors that donate Go Passes (if desired).
- Continue refining administration of program to maximize efficiency, efficacy for staff and community-serving organizations.

FOR MORE INFORMATION

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