

# Caltrain Go Pass Donation Program

Citizens Advisory Committee

April 19, 2023

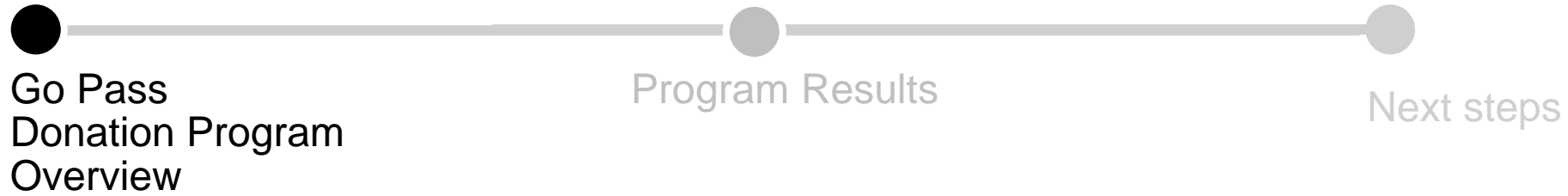
Agenda Item 7



# Presentation Overview

- Go Pass Donation Program Overview
- Program Results
- 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.

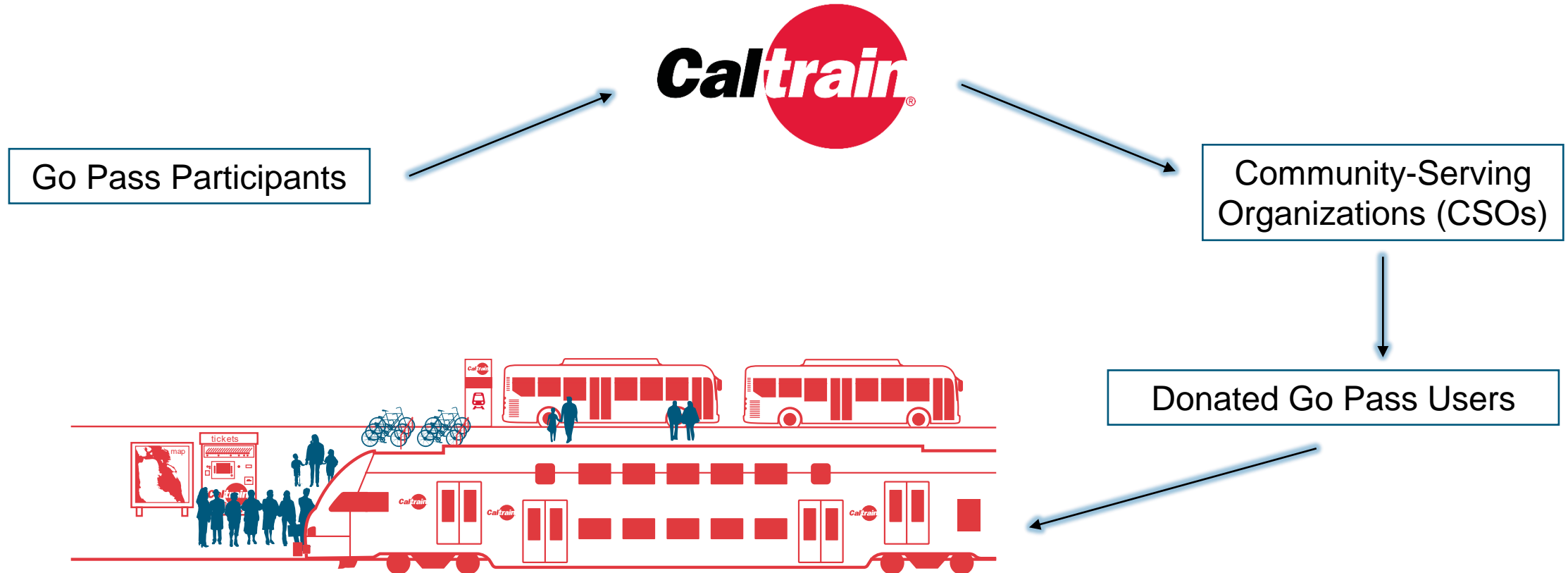
# Program Goals

## 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.
- Reviews applications from community serving organizations against equity framework
- 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 identifies 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](mailto:GPDP@caltrain.com).
- Any size donation of unused 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.
- Reviewed against a quantitative and qualitative equity framework that considers income, race, English language proficiency of constituents, among other factors

## Input from Participants

- Participating companies may nominate a community-serving organization to receive donated 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, Akarshak Jaiswal**

*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

# 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)

- Seeking to distribute at least **1,500 passes** in 2023 (expand as is feasible), drawing from current supply of over 10,000 passes
- Two enrollment stages:
  - **Stage 1:** Continue community-serving organizations from Phase 1.5 **[Complete]**
  - **Stage 2:** Accept applications from qualified **new** community-serving organizations on a rolling basis **[In Progress]**
- Regular Go Pass participants **may donate additional unused passes** to maximize benefits and to continue supplying passes



# Phase 2 Enrollment Update

## Outreach Strategies

- Direct staff outreach
- Leveraging relationships with existing partner CSOs
- Leveraging staff relationships with other agencies
- News release and website
- Outreach through Caltrain's advisory committees including CAC and BATAC

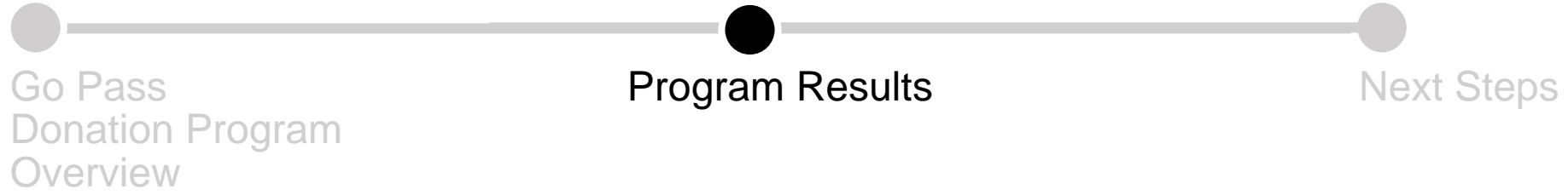
## Operations

- Moved application online to [caltrain.com/go-pass-donation-program](https://caltrain.com/go-pass-donation-program)
- **Continuing to accept applications on a rolling basis** – please encourage qualified organizations to apply!

## Enrollment

- **8** organizations **reenrolled** in the program from 2022
- **5 new** organizations have applied to the program. Caltrain staff working to bring these organizations under contract

# Program Results

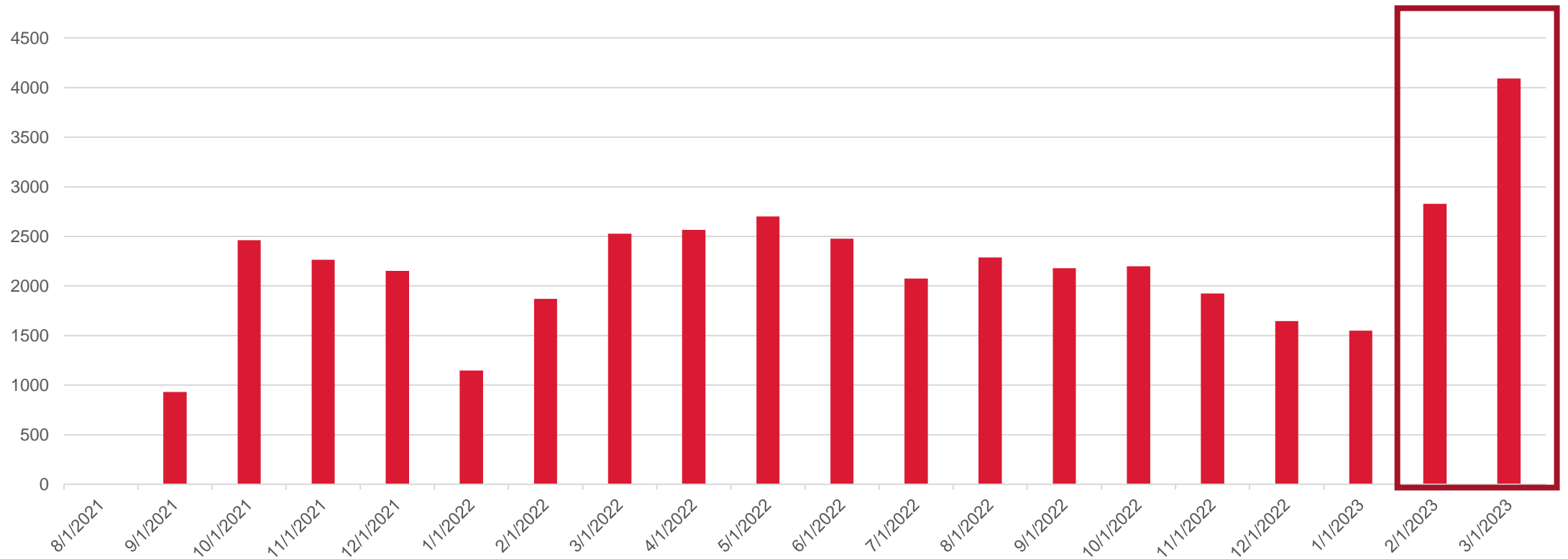


# Ridership and Trip Purpose

Metrics	Phase 1 (2021)	Phase 1.5 (2022)	Phase 2 (2023)
Passes Distributed to Community-Serving Organizations	700	388	1,016
Total Number of Passes in Use	396 (56%)	233 (61%)	257 (25%)
New to Caltrain	40% of GPDP Users	48% of GPDP users	29% of GPDP Users
Weekly Ridership	500 rides/week	650 rides/week	650 rides/week
Trip Purpose	<ul style="list-style-type: none"><li>Commuting to work was the primary trip purpose, regardless of new or existing riders</li><li>'Social/recreational' was the second most popular trip purpose</li></ul>		

# Ridership Trends

Strong ridership in February (+51% YoY) and March 2023 (+62% YoY)



Source: Clipper Product Reports



# 2023 Impact by Community-Serving Organization

Phase 2 (2023) Enrolled Community-Serving Organizations	Organization Type	Loaded Passes	Users (March 2023)	Share of Loaded Passes used (March 2023)	Rides per User (March 2023)
Alta Housing	Housing	57	21	37%	4
Commute.org	TMA	248	70	28%	5
CORA	Support Services	30	0	0%	0
Manzanita Works	Workforce Development / TMA	14	9	64%	14
Palo Alto TMA	TMA	176	83	47%	9
Sacred Heart Community Service	Support Services	43	5	12%	1
Samaritan House	Support Services	120	38	32%	5
Sunnyvale Community Services	Support Services	36	3	8%	1
<b>TOTAL</b>		<b>724</b>	<b>229</b>	<b>31%</b>	<b>5*</b>

\*Program Average



# GPDP User Demographics

## Race/Ethnicity

### Go Pass Donation Program Race/Ethnicity Breakdown

2023 Go Pass Donation Program Riders are **4x more likely to be Hispanic / Latino** and **2x more likely to be Black / African American** as compared to Caltrain Ridership as a whole

Race/Ethnic Background	2022 Caltrain Triennial Customer Survey	2021 Regular Go Pass Donation Program	2022 Go Pass Donation Program	2023 Go Pass Donation Program
White/Caucasian	39%	34%	22%	16%
Hispanic/Latino	13%	38%	38%	54%
Black/African American	4%	14%	15%	8%
Asian	34%	20%	16%	12%
American Indian	<1%	1%	1%	<1%
Native Hawaiian or Pacific Islander	1%	2%	0%	2%
Other	9%	3%	6%	7%

Source: Go Pass Donation Program User Survey (2021, 2022, 2023), Go Pass Program User Survey, 2022 Triennial Survey



# GPDP User Demographics

## Language

While many program users speak English well or very well, almost **20%** of 2023 users have limited English Language Proficiency

**2/3** of 2023 users speak either only Spanish or a combination of English and Spanish at home

How well do you speak English?	2021 Regular Go Pass Donation Program	2022 Go Pass Donation Program	2023 Go Pass Donation Program
Very Well	79%	70%	63%
Well	14%	20%	19%
Not Well	5%	7%	11%
Not at All	2%	4%	7%

Source: Go Pass Donation Program User Survey (2021, 2022, 2023)

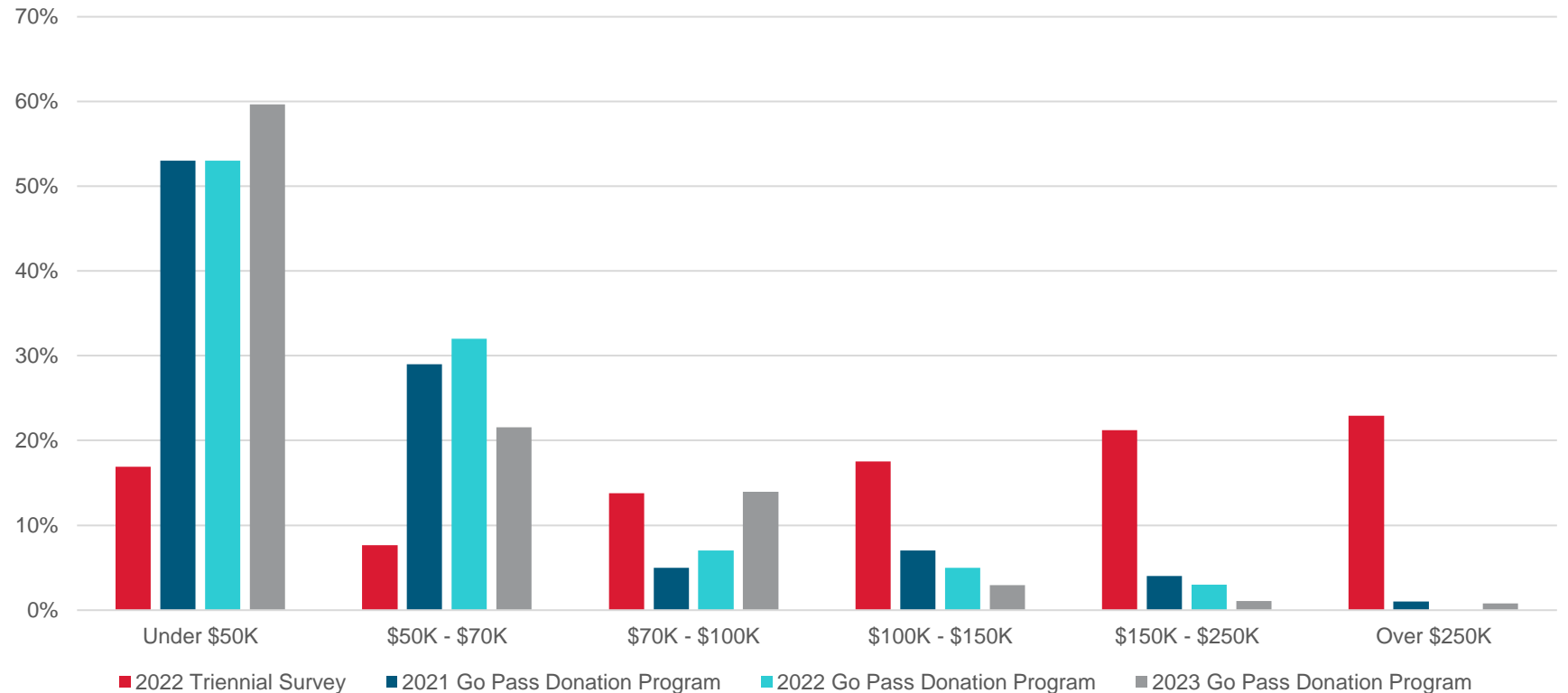


# GPDP User Demographics

## Annual Household Income

**60%** of 2023 Go Pass Donation Program participants have an annual household income under \$50,000. This is higher than any previous year

**82%** of program participants have an annual household income under \$75,000



Source: Go Pass Donation Program User Survey (2021, 2022, 2023), 2022 Triennial Survey



# 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**



# Testimonials from Users



"I ride from Redwood City to Cal Ave daily. I love the ease, and calmness of the train. It's fast and economical. No worries about traffic or gas prices or wear and tear on my car. I've convinced my coworker to use the program as well. Let's keep helping the environment and enjoying the ride!"

Kimberly Koch, Dion Health



"The benefits of having a transit pass are that I can avoid traffic and it's fast. Taking transit saves me money so I have more to take care of my family."

Geraldo Valencia, Whole Foods



"The train from San Jose is faster than driving. Not being in bumper-to-bumper traffic reduces the stress of my commute."

Alan Kayser, Palo Alto Bicycles

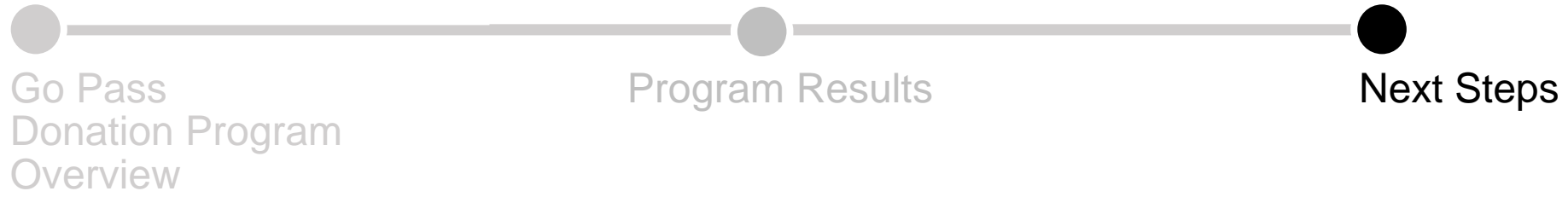


"When I have to drive to work from Belmont I wish I was on the train. The Belmont Caltrain station is conveniently down the hill and then when I go home I get exercise biking up the hill. Plus it's fun taking the train home on Friday afternoon because people are happy it's the weekend."

Rene Rivera Rosales, Sheraton



# Next Steps



# Next Steps

- Continue accepting donations of unused passes from regular Go Pass companies.
- Continue outreach to enroll up to 15 additional CSOs in the 2023 program.
- Continue to build partnerships with enrolled CSOs.
- Generate publicity for Caltrain and donors that donate Go Passes (if desired).
- Leverage ridership and utilization data to partner with CSOs and continue to grow ridership.

**FOR MORE INFORMATION**

**WWW.CALTRAIN.COM**

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