



Local Policy Maker Group (LPMG) Meeting

Meetings of the LPMG are conducted via teleconference only (no physical location).

Directors, staff and the public may participate remotely via Zoom at

<https://us06web.zoom.us/j/85925215034?pwd=L3pxeEVITTFrVjVIYW5s3OW5wekw2dz09>

for audio/visual capability or by calling 1-669-219-2599, Webinar ID: # 859 2521 5034 Passcode: 973354 for audio only.

Public Comments: The Chair shall have the discretion to manage the Public Comment process in a manner that achieves the purpose of public communication and assures the orderly conduct of the meeting. Members of the public are encouraged to provide public comments in the following ways:

- **Email:** Comments may be submitted by emailing publiccomment@caltrain.com before each agenda item is presented. Please indicate in your email the agenda item to which your comment applies.
- **Auditory:** Oral comments will also be accepted during the meeting. Web users may use the 'Raise Hand' feature to request to speak. Callers may dial *9 to request to speak. Each commenter will be notified when they are unmuted to speak.

Thursday, September 28, 2023

5:30 p.m. – 7:30 p.m.

Agenda

1. Call to Order
2. Roll Call
3. Caltrain Staff Report (Oral Update and Memo)
4. Caltrain Customer Acquisition Strategy
5. Proposed Electrified Service Plan for Fall 2024
5. Public Comments on items not on the agenda
6. LPMG Member Comments/Requests
7. Next Meeting
 - a. Thursday, October 26, 2023 at 5:30 p.m.
8. Adjourn

All items on this agenda are subject to action

**CalMod Local Policy Maker Group (LPMG)
Summary Meeting Notes August 24, 2023**

Summary Notes

The purpose of these notes is to capture key discussion items and actions identified for subsequent meetings.

1. Call to Order

Chair Pat Burt called the virtual meeting to order at 5:30 p.m.

2. Roll Call

City / County	Representative or Alternate	Present	Representative or Alternate	Present
Atherton	D. Hawkins-Manuelian	X	S. Holland	
Belmont	T. McCune	X	D. Hurt	
Brisbane	T. O'Connell		C. Lentz	
Burlingame	E. Beach	X	A. Keighran	
Gilroy	M. Blankley	X	Z. Hilton	
Menlo Park	J. Wolosin	X	B. Nash	
Millbrae	G. Papan	X	M. Goodman	
Mountain View	M. Abe-Koga		A. Hicks	
Morgan Hill	M. Turner	X	M. Beltran	
Palo Alto	E. Lauing	X	V. Veenker	
Redwood City	E. Martinez Saballos	X	D. Howard	
San Bruno	M. Salazar	X	R. Medina	
San Carlos	R. Collins		P. Venkatesh	X
San Francisco	A. Sweet			
San Jose	S. Jimenez		D. Davis	
San Mateo	A. Lee		R. Hedges	
Santa Clara	A. Becker	X	R. Chahal	
South San Francisco	E. Flores		J. Coleman	
Sunnyvale	A. Cisneros		R. Mehlinger	X
San Francisco BOS	TBD		TBD	
San Mateo BOS	TBD		TBD	
Santa Clara BOS	TBD		TBD	
Chair	Pat Burt	X	Jeff Gee	
Vice Chair	Jen Wolosin	X		

VACANT SEATS: Santa Clara BOS, San Francisco BOS, San Mateo BOS

CALTRAIN staff: Casey Fromson, Devon Ryan, Bella Conferti, Dora Seamans

Kimley-Horn staff: Jill Gibson, Sam Zimbabwe, Edgar Torres, Darren Adiran, Gabe Keehn, Taylor Filaroski

Redwood City staff: Linday Chan, Principal Planner

3. Caltrain Staff Report (Oral Update and Memos)

Devon Ryan, Government and Community Affairs Officer provided the updates, which included the following:

- The California Transportation Commission (CalSTA) approved awards allocations to Caltrain, including \$367 million dollars for the electrification project and \$80 million dollars for a battery equipped electric multiple unit (BEMU) train (for use as a demonstration test train)
- The test train will be able to charge on the electrified system coming down from San Francisco and then run off wire once it hits San Jose to Gilroy, and then charge on the line when it goes back from San Jose to San Francisco
- Expressed thanks and appreciation to all LPMG members, especially South Bay Members for their engagement and support for future zero emission service to the southern portion of the corridor
- Exercised some options on the Stadler contract with the four EMUs that will mostly be paid for with federal FTA (Federal Transit Administration) formula funds distributed from MTC (Metropolitan Transportation Commission)
- Beginning September 1st, introduction of four new temporary fare products to provide more options to riders and save money while using Caltrain:
 - \$1 youth pass for ages 18 and under
 - 3-day unlimited rides pass immediately upon purchase
 - Family day pass for two adults and up to four youths to ride together for the cost of two adults and one youth
 - Group day pass that allows a group of 4 to 6 people to travel together for 15 percent off the cost of four tickets
- Starting September 1st, reduced Caltrain parking fees by 50 percent at all stations
- Staff will provide a marketing presentation next month and will also send out promotional/marketing information to LPMG members to share/post
- It is Transit month and Rail Safety month
- Adding a fourth train for round trip service for southern Santa Clara County

Brent Tietjen, External Affairs Manager, provided an update on the electrification project which included the following:

- Construction to be completed by the end of the year with a handful of poles, 101,000 feet of wire, and ten traction power facilities that must be installed along the corridor
- Energization from San Francisco to Menlo Park expected to occur in October with a lot of safety outreach around that piece; the section south of Menlo Park was energized
- Safety outreach and signal work was done for the 31 Grade crossings along the corridor with the temporary weekday service changes to facilitate that work

- Four electric trains on property; 4,200 people attended the July 29 tour at Diridon Station in San Jose; the next tour will be on September 23 in San Francisco from 10 am to 2 pm and invites were sent electronically; train tour in San Mateo County pending
- Dynamic testing started and movement of the trains will continue through summer of next year; Train testing needed for each segment

4. Caltrain Corridor Crossing Strategy (Presentation)

Caltrain, Kimley Horn and City of Redwood City staff took turns providing a joint presentation that included the following:

- Two program approaches for project delivery opportunities and program strategy development and the delivery guide to be completed by the end of the year
- Advancing through different technical strategies, vision, and concept design
- Key design constraints included crossing spacing, adjacent land use, OCS (Overhead Contact System), and drainage and underground utilities
- Crossing spacing between grade crossings is important because the closer the crossings are to each other, the easier to grade separate with multi-crossing solutions, such as a viaduct
- Adjacent land density environment around crossings plays a major role in the choice of design solutions, including distinctions made between rural and urban environmental needs
- Design solution must ensure the maintenance of the OCS system during construction and into the future
- Any large drain system creates challenges for underpasses and trenches
- Caltrain owns the corridor section from San Francisco to Gilroy and south of that is owned by Union Pacific Railroad (UPR) – each agency dictates the design standards of a grade separation within their right-of-way
- Depending on the width along the corridor, narrower areas of about 50 feet requires right-of-way acquisition
- Reviewed different types of designs solutions which included viaduct, embankment, underpass, hybrid, trench, overpass, full closure, or vehicular only closure versus rerouting traffic
- Redwood City's processes to separate the railroad tracks from cross streets included the following:
 - Two fundamental goals: feasibility analysis on alternatives for each grade crossing and decide on a long-term strategy for how to address or add grade crossings
 - City has eight corridor crossings with two already separated; reviewed existing constraints that included both lowered and elevated crossings, three creeks, and assumption of combined grade separation project with a new four-track station in downtown Redwood City
 - The new station is the key element to facilitate Caltrain's 2040 service vision, which requires a mid-peninsula station for local and express trains to meet and allow passengers to walk across the platform to transfer trains
 - Tracks crossing Broadway and Brewster must be separated and staff was directed to only consider options for tracks at or above grade and to consider impacts to the surrounding neighborhoods and streets

- Reviewed multiple options using public input and technical feasibility criteria and to minimize potential right-of-way impacts and increasing connectivity and safety

LPMG members' and alternate members' key comments and clarifications with staff included the following:

- In response to how much the Redwood City feasibility study cost, *staff responded that they would follow-up.*
- A Member noted not seeing some crossings reflected in the presentation, *staff clarified that the presented map was to identify the existing grade crossings and that any existing over or under crossings in the corridor would provide barriers to any multi-crossing solution (such as viaducts or embankments) and to provide various scenarios and potential solutions to use as a starting point to evaluate grade separations.*
- A Member opined that the crossings should be approached as a whole, be more reflective, and provide more price/cost information. *Staff will take that into account and try to weave cost information into future presentations.*
- A Member asked that with the decision to elevate the tracks, how the installed power lines, poles, and any project modifications would work with the existing utilities, *staff said they will all be evaluated during the design phase to determine if they meet or exceed the needed clearances, and if any do not, they would need to be modified.*
- *Staff clarified that all current rail operations would need to be maintained which may need transferring to a shoofly track (or a temporary track) approach during any modifications.*
- It took two to three years for Redwood City processes from start to the current situation with the summation to be presented to its City Council in October with alternatives and next steps; another study would be needed to understand how it can be leased.
- A Member asked about viaduct safety and regulatory concerns, *staff clarified that there are specific regulatory requirements that they must design around.*
- A Member asked about leasing, *staff clarified that leasing depends on the context of the surrounding environment and cited London as an example of an active urban environment.*
- A Member asked how Redwood City did its phasing/prioritization, *staff provided a brief summary and noted that the preferred alternative was to do them all in one phase due to the benefits of the economy of scale and impacts to the community.* This Member noted these are important questions for the LPMG, the Caltrain Board, and the community to figure out if we will take a more regional approach to funding and identifying the biggest priorities.
- A Member asked about the impacts of the High-Speed Rail (HSR) tracks, *staff noted technical work being done that will be rolled out in the coming months for more clarity on Caltrain's position as it relates to HSR on the corridor.*
- *Staff clarified that the viaduct is Redwood City's preferred alternative with some dipping of the roadway needed – essentially a hybrid viaduct.*
- Chair Burt noted that in Palo Alto, they are doing a follow-up noise study because they want to understand the impacts for homes and businesses. He noted that electric trains are quieter than diesel trains.

- A Member noted that trenching has different implications for sound and elevation and the need to look at all the differences; she also asked staff to look further into value, best practices, and bringing down costs down for a smaller funding gap.
- A Member noted the importance of having illustrations and definitions to ensure everyone is speaking the same language for understanding.

Public Comment

Adrian Brandt asked about sound levels, suggested visiting San Bruno as an example of an elevated multi-street grade separation, Bay Area Rapid Transit District (BART) has examples of fully activated spaces below its tracks, and commented on other local examples of what could be expected for viaducts, noise, and vibrations.

5. Public Comments on items not on the agenda

There were no public comments.

6. LPMG Member Comments/Requests

In response to a Member's inquiry on the proposed schedule for a fourth train to Gilroy, *staff clarified that an email invitation was sent to meet and discuss the upcoming schedule.*

Chair Burt noted marketing plans to promote ridership and keep service sustainable would be discussed at future meeting.

7. Next Meeting

Thursday, September 28, at 5:30 pm.

9. Adjournment

The meeting was adjourned at 6:59 p.m.



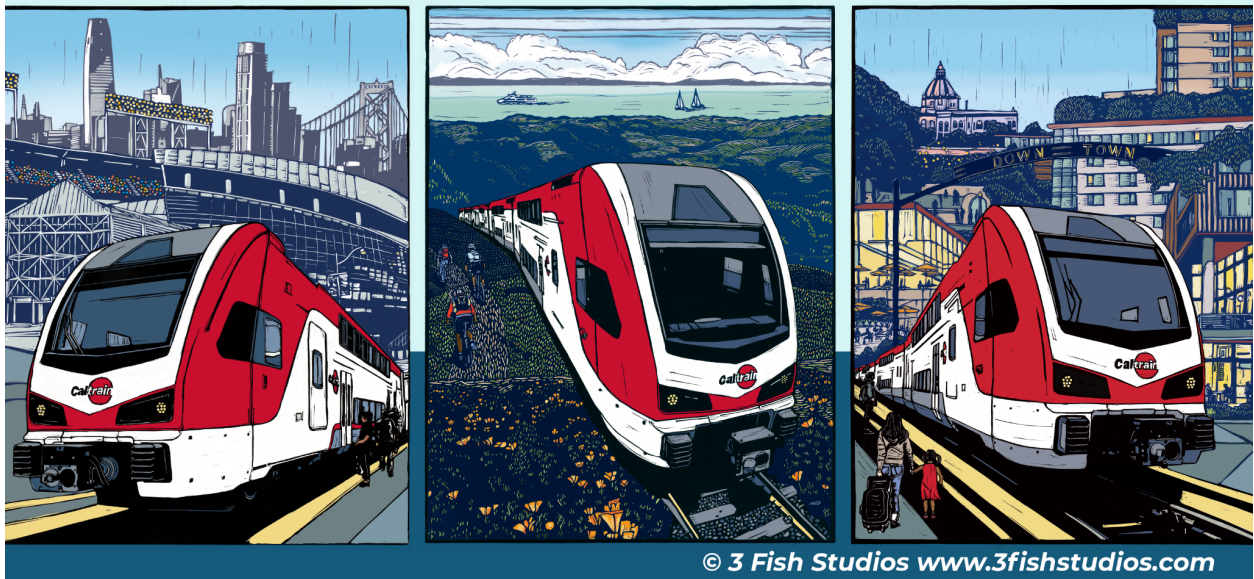
Memorandum

Date: September 25, 2023

To: Caltrain Local Policy Maker Group (LPMG)

From: Devon Ryan, Government and Community Affairs Officer

Re: Caltrain E-Updates



Caltrain to Host Public Electric Train Tour in San Francisco

The Caltrain Electrification team will host the second of three planned electric train tours. This event will be hosted on **Saturday, September 23 from 10am-2pm at 4th and King Station in San Francisco**. This will be a family friendly event that will be open to the general public and will feature food trucks, games and music in addition to the train tour.

You can learn more here: caltrain.com/electric-train-tour.

Ennergization of Second Traction Power Substation

For the first time, the Caltrain Traction Power Substation in South San Francisco, constructed by Balfour

Beatty and its industry partners, was energized with power from Pacific Gas and Electric Company. This milestone achievement in the Caltrain Electrification Project signifies major progress in expanding Caltrain's ability to test and run electric trains along the corridor.

Caltrain's substation in South San Francisco is one of two main traction power substations along the Caltrain corridor, in addition to the San Jose location which was energized last August. Together, with eight other smaller facilities along the corridor, power substations provide, distribute, and regulate electricity to the overhead wires which will power Caltrain's new high-performance electric trains.

[Learn more.](#)

Rail Safety Month

To highlight the importance of safety around train tracks and the high rate of intentional deaths on the rails, Caltrain participates in Rail Safety & Suicide Prevention Month. In honor of Rail Safety & Suicide Prevention Month, Caltrain will be promoting rail safety tips and suicide prevention resources on its various social media platforms. Caltrain is also planning two rail safety events in September to engage community members:

- On September 19, Caltrain and the Transit Police unit will host a Rail Safety Blitz event to educate drivers and pedestrians at specified grade crossings with rail safety educational brochures.
- Caltrain will be hosting a rail safety booth at the agency's next public Electric Train Tour event Saturday, September 23.

To be a part of the conversation during Rail Safety & Suicide Prevention Month, passengers and local residents can pick a favorite safety tip and share it on social media with #CaltrainSafe and #RailSafety.

Learn more about [Rail Safety Month](#).



Transit Month and Fare Promotions

Caltrain introduced four new temporary fare products designed to give riders more options for how they travel, making it easier to save money by using Caltrain.

- Family Day Pass: This pass allows two adults and up to four youth (18 and under) to ride together for the cost of two adults and one youth. All Family Day Pass riders must travel together in same train car.
- Group Day Pass: The Group Day Pass allows a group of four to six people to travel together for

15% off the cost of four tickets. All Group Day Pass travelers must travel together in the same train car and must be in the same fare class (Adult, Youth, Eligible Discount).

- \$1 Youth Rides: The \$1 Youth Pass provides one-way rides for merely a dollar for everyone 18 and under.
- 3-Day Pass: The 3-Day Pass allows the pass holder to take unlimited trips for three consecutive days from the date the pass is purchased, perfect for the hybrid commuter.

In addition, parking is now 50% off at all stations. [Learn more.](#)

Celebrating More Weekday Service for Gilroy and Morgan Hill



On Monday, September 25, a fourth Gilroy train departed, marking expansion of service into Southern Santa Clara County, including Gilroy and Morgan Hill. Members of the Gilroy City Council and Caltrain's board came to celebrate this milestone. This development has been met with enthusiastic support from local officials and community leaders, recognizing its significance in addressing the region's transit needs.

More information is available [here.](#)

Fare Structure

The Caltrain Board of Directors has adopted a new fare structure, delaying previously approved fare increases until July 1, 2025 and lowering the price of Go Pass, Caltrain's discounted fare product for businesses and students.

This new approach will result in more gradual, incremental fare increases than what was previously

approved in September 2019, with each step only being 25 cents. This will provide Caltrain's ridership with more time to continue to grow, as weekday ridership has surpassed 20,000 per day, 21% higher than it was this time last year, even despite service reductions due to the Electrification project in recent months.

[Learn more.](#)

PUBLIC MEETINGS:

JPB Finance Committee – Sept. 27, 2023 at 2:30 p.m.

JPB Technology, Operations, Planning, and Safety (TOPS) Meeting – Sept. 27, 2023 at 1:30 p.m.

JPB Advocacy and Major Projects (AMP) Meeting – Sept. 27, 2023 at 3:30 p.m.

Caltrain Board Meeting – Oct. 5, 2023 at 9:00 a.m.

For more details, and a full list of upcoming meetings, please visit [Caltrain.com/Meetings](https://caltrain.com/Meetings).

PROGRESS REPORT:

The presentation on Caltrain Electrification progress presented at Caltrain's September 7, 2023 Board Meeting is [available here](#).

November Program Strategy Work Sessions

Goals:

- Present Program Strategy progress
- Collaboratively develop Centralized Program Approach

Topics:

- Program Strategy Vision

Activities

- Presentations with engagement activities built in
- Small group discussion

Audience

- LPMG members
- CSCG and SAT will host separate workshop



November Program Strategy Work Sessions

Logistics:

- LPMG In-Person Meeting
 - 11/30
 - 4 PM – 6 PM

Location:

- Mountain View City Council Chambers

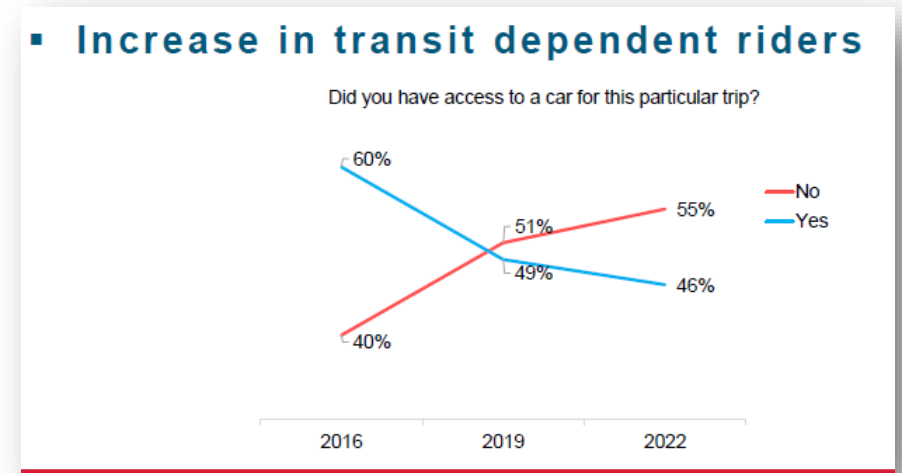


Caltrain Customer Acquisition Strategy

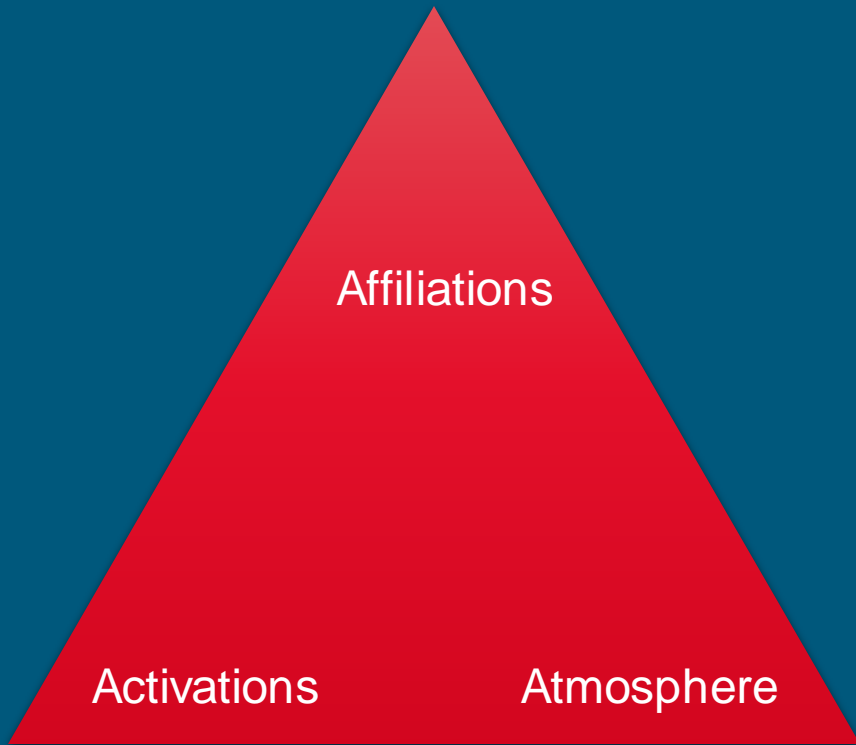


Intro to Customer Acquisition Strategy

- Formal customer acquisition strategy **first of its kind** at Caltrain.
- Remote work has significantly changed the way people move across the Bay Area, necessitating a **strong response**: changes to operations, fare products, and how we approach marketing.
- This roadmap was built in **collaboration** with the Ridership Growth Taskforce: staff Ops Planning, Marketing, Creative Services, Research, Policy Development and Finance.
- Acquisition strategy is primarily **focused on a non-rider (i.e., either future or lapsed)** audience.
- **Equity, Connectivity, Recovery & Growth** framework key reference document



Caltrain Customer Acquisition Strategy



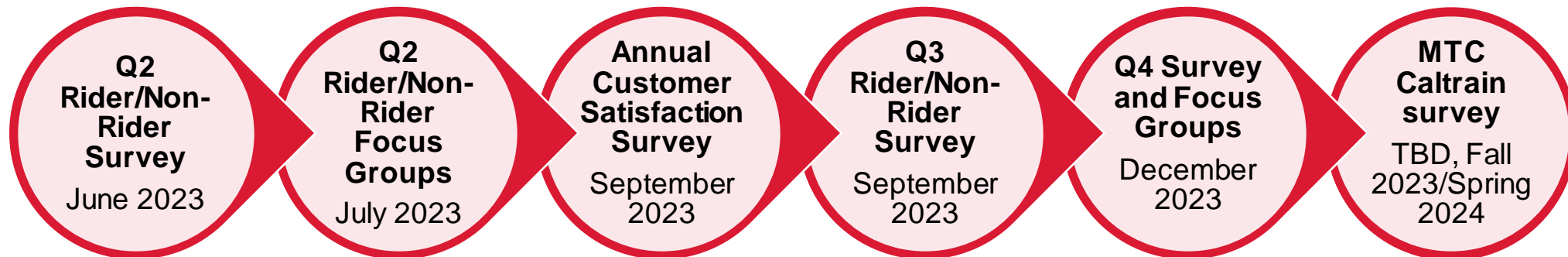
- **Affiliations:** Ridership growth through promotion of specific fare products to affiliates, i.e., partnerships with organizations that align with target consumer segments. Go Pass is the Core product in Caltrain's business-to-business (B2B) marketing strategy.
- **Atmosphere:** Ridership growth through brand campaigns that situate Caltrain competitively and generate atmosphere; this is where Caltrain promotes new service and its bona fides.
- **Activations:** Ridership growth through creative activations of existing assets, delivering earned media and engagement with new communities.
- **All informed by internal and regional data.**

Data: Current and Future Sources

Current Sources

- Triennial Customer Survey (Fall 2022): Detailed survey polled existing riders
- Ridership Growth Survey (Q1 2023): General market segmentation data of adult residents of communities served by Caltrain from San Francisco to Gilroy
- Bay Area Council (Bi-monthly): Survey of employers' return to workplace plans

Future Sources

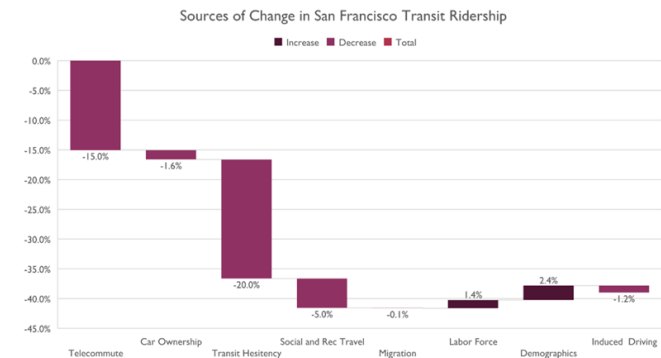


Data: The Big Picture

- **The commuter** remains Caltrain's core customer (61% work trip purpose in 2022), thus low office occupancy is severely affecting ridership.
- Customers have **chosen alternatives** to Caltrain due to a variety of factors:
 - Routes/Destinations
 - Caltrain not necessary for riders to get to destinations
 - Proximity to stations

Yet people like Caltrain. Favorability of Caltrain among all surveyed cohorts (70% satisfaction among current riders; 59% favorable among general pop; 15% unfavorable among target general pop) presenting high potential for growth opportunity.

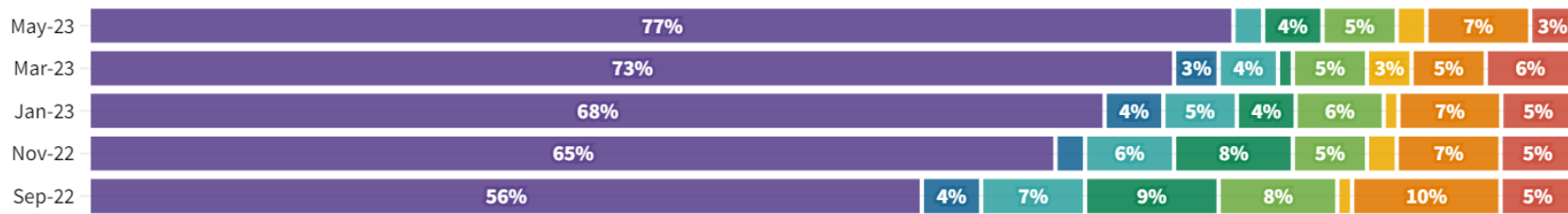
TrendLab analysis of the causes of San Francisco transit decline



Data: The Big Picture

From today, when do you think your new long-term “normal” will be fully implemented in your organization? (i.e., all employees who you would like to return to the workplace have returned with consistency)

■ Not applicable/we are already operating under our new normal ■ Within one month ■ 1-2 months ■ 3-4 months ■ 5-6 months ■ 7-11 months ■ At least one year
■ We do not plan on bringing employees back to the workplace



- The "new normal" for commute patterns has arrived and is stable.
- According to regional employers (BAC), approximately 22% of the workforce will be fully remote.

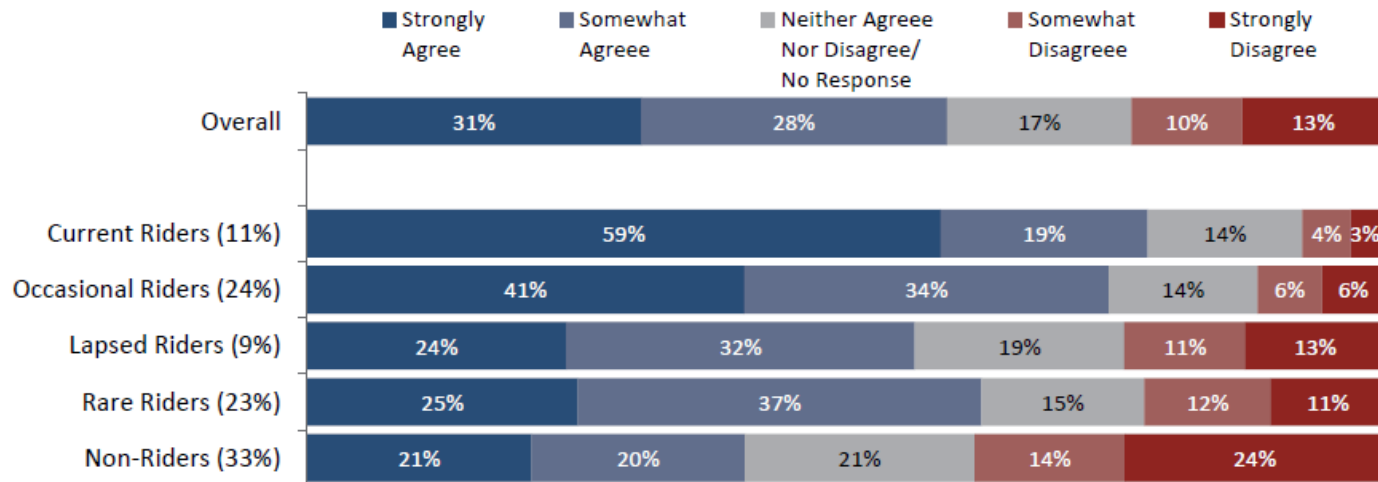
Data Analysis: Positives

Caltrain Positive Attitudes



Despite the challenges expressed, residents are attitudinally in favor of using Caltrain over driving. A majority would prefer taking Caltrain over driving if it is a feasible option to reach their destination. These sentiments are largely shared between those who ride Caltrain in any capacity, as well as a large share of non-riders.

"If I can take Caltrain to get to my destination, I would rather do that than drive"



People want to take Caltrain more than they want to drive.

- **Create the right conditions** for people to ride.
- **Provide solutions** to people's transportation's problems.
- **Market what we offer** in a way that positions us competitively.

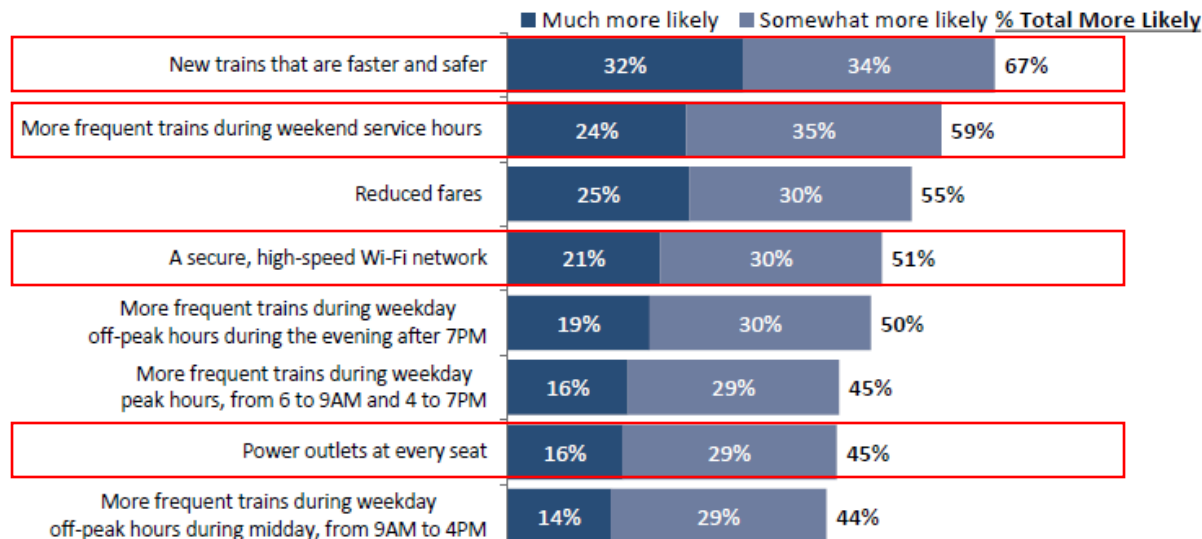


Data Analysis: Incentives

Ridership Incentives - Overall



Two-thirds of the respondents are more likely to ride Caltrain if they have access to new trains that are faster and safer. Additionally, over half of the respondents indicated that more frequent weekend train services, reduced fares, and a secure high-speed Wi-Fi network would make them more likely to ride Caltrain.



- **Caltrain Electrification** is the greatest opportunity to meet customer needs and desires.
- **New Fare Products** that provide hybrid workers with a ticket that makes sense for their commute, plus products for families, groups, and youth.

Q62-69. Next, you will read about some changes Caltrain made recently or is currently making. For each one, please indicate whether that change makes you much more likely, somewhat more likely, or not more likely to ride Caltrain more often.



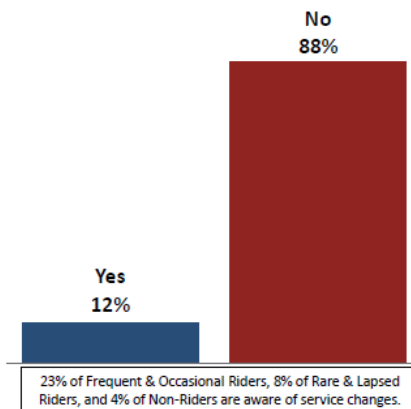
Data Analysis: Awareness

Caltrain Service Changes Awareness



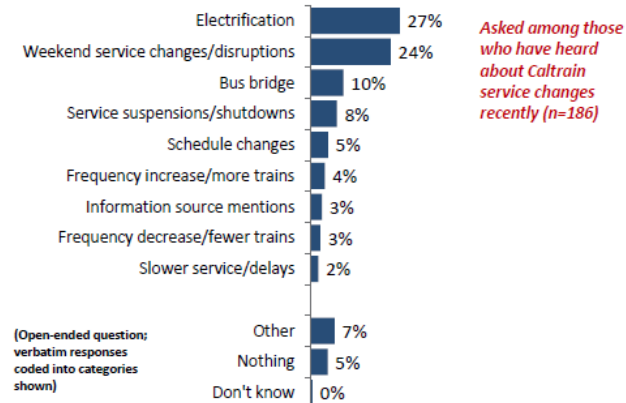
Most of the respondents were found to be unaware of any service changes on Caltrain. However, among those who have heard about any changes, electrification and weekend disruptions are the most frequently mentioned items.

Have you heard anything about Caltrain service changes recently?



060 63

What have you heard about Caltrain service changes recently?



Asked among those who have heard about Caltrain service changes recently (n=186)

73 8816 Caltrain Q1 2023 Results DRAFT 1.17

- 88% of participants in the general survey were **not aware** of current or upcoming changes to service.
- This **must change** for transit to modernize and grow – so here is the plan.



Atmospheric Campaigns

Brand campaigns that position Caltrain competitively through launching new and better service while promoting bona fides.



New Fare Products – Focused on Developing New Rider Markets

Pilot Sept 2023-Jan 2024

Offered on Caltrain's Mobile App and at Ticket Vending Machines at Stations:

- **Family Day Pass:** Via one ticket, allows 2 adults and up to 4 youth to ride together for the cost of 2 adults and 1 youth ticket. Family must travel together in same train car.
- **Group Day Pass:** Via one ticket, groups of 4-6 people can travel together, for 15% off the cost of 4 tickets. Group must be in the same fare class, must travel together in the same train car.
- **3-Day Pass:** Via one ticket, allows one individual to take unlimited trips for three consecutive days, from the date the ticket is purchased.

Offered on the Clipper* Youth Cards:

- **\$1 Youth Pass:** Price for youth rides will be set to \$1 for those who have Clipper Youth Cards.



*Clipper limitations: While the Clipper vendor, Cubic, is focused on development of Clipper Next Generation for deployment in 2024, all transit agencies may only make price changes to existing products and may not introduce new products on Clipper.



Caltrain Electrification

Will be largest marketing effort ever undertaken by Caltrain.
Will occur in three (working title) segments:

- Trains are Coming (2023)
- Trains are Arriving (Early 2024)
- Trains are Here (September 2024)



Additional Campaigns Fall 2023/Winter 2024

- **South Santa Clara County Service Increase:** New campaign promoting increase from 3 to 4 AM/PM train trips per day. Marketing collaboration with Gilroy, Morgan Hill, San Jose
- **Bike/Scooter Users:** New campaign based on data that reflects highest percentage of bikes/scooters on Caltrain ever
- **Mid-Day Service:** New campaign based on promotion of existing increased mid-day frequency
- **Clipper START:** Promote underutilized low-income fare program
- **Destination Caltrain:** Destination-based campaign promoting the places you can visit using Caltrain (including new Central Subway connection etc.)

Affiliation Marketing

Efforts to partner with employers and organizations along the Caltrain Corridor, a.k.a. B2B marketing.



Go Pass Growth Strategies

- Reduction in pricing; proposed student Go Pass; aggressive marketing efforts to promote Go Pass to new partners and employers along the corridor.
- Currently 1/3 of Caltrain's fare revenue; critical assets to monitor.

City Partnerships:

- Create asset that can be shared with cities, describing options/tools that could benefit city GHG goals and promote ridership, example transit pass requirements with development (TDM Requirements)
- Deepen relationships and collaborate with cities for community events including in San Francisco, San Mateo, and San Jose.

Partnerships: Cities and Employers



Go Pass Donation Program

- Through this program, Caltrain partners with qualified community-service organizations, which distribute donated Go Passes to their constituents, who may not otherwise have access to Caltrain.
- Equity focus: Expand and maximize access to the Caltrain system for low-income and equity focused riders.
 - 60% of 2023 Program participants have an annual household income under \$50,000.
 - 85% of 2023 Program participants are people of color.
 - 50% of 2023 Program participants are new to the Caltrain system.
- **Expand partnerships with other community-serving organizations**
- **Encourage more use of Go Passes for more rides on Caltrain**
- **Rebrand/Continue to Promote:** Name to better reflect program



“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



Activations/Events Marketing

Innovative ways to use Caltrain property, assets, and events to engage with new and current communities.



Summer of Caltrain

- Customer Appreciation at three stations (June 1)
- Innocenti Strings Soloist at station (June 5)
- San Mateo County Fair (June 3-11)
- Pride / Chalk Muralist (June 25)
- Coaster Campaign (July)
- EMU Public Event (July 29)
- Onboard Trivia (TBD)
- Music Event (TBD)
- More info at caltrain.com/summer



Staying On Track

- We will consistently survey our riders and communities to understand their needs and change course as needed.

Customer Experience Improvements

- Customer **retention** through improvements to their **experience**
- New **Director of Customer Experience** to join August 2023
- New **fare products** will help meet consumer demand
- Concluded series of **three focus groups** (June 2023) that interviewed current, infrequent, and lapsed riders:
 - Improve "sterility" of stations to surprise and delight customers
 - Early analysis indicates a variety of problems solved by electrification
 - Frequency of Service
 - Cleanliness
 - Wi-fi
- Staff will present a **customer experience and retention strategy** late summer/early fall following new key CX staff onboarding.



Questions

FOR MORE INFORMATION

WWW.CALTRAIN.COM



Caltrain Electrification

PROPOSED SERVICE
PLAN FOR FALL 2024

Local Policy Makers Group
(LPMG)

September 28, 2023



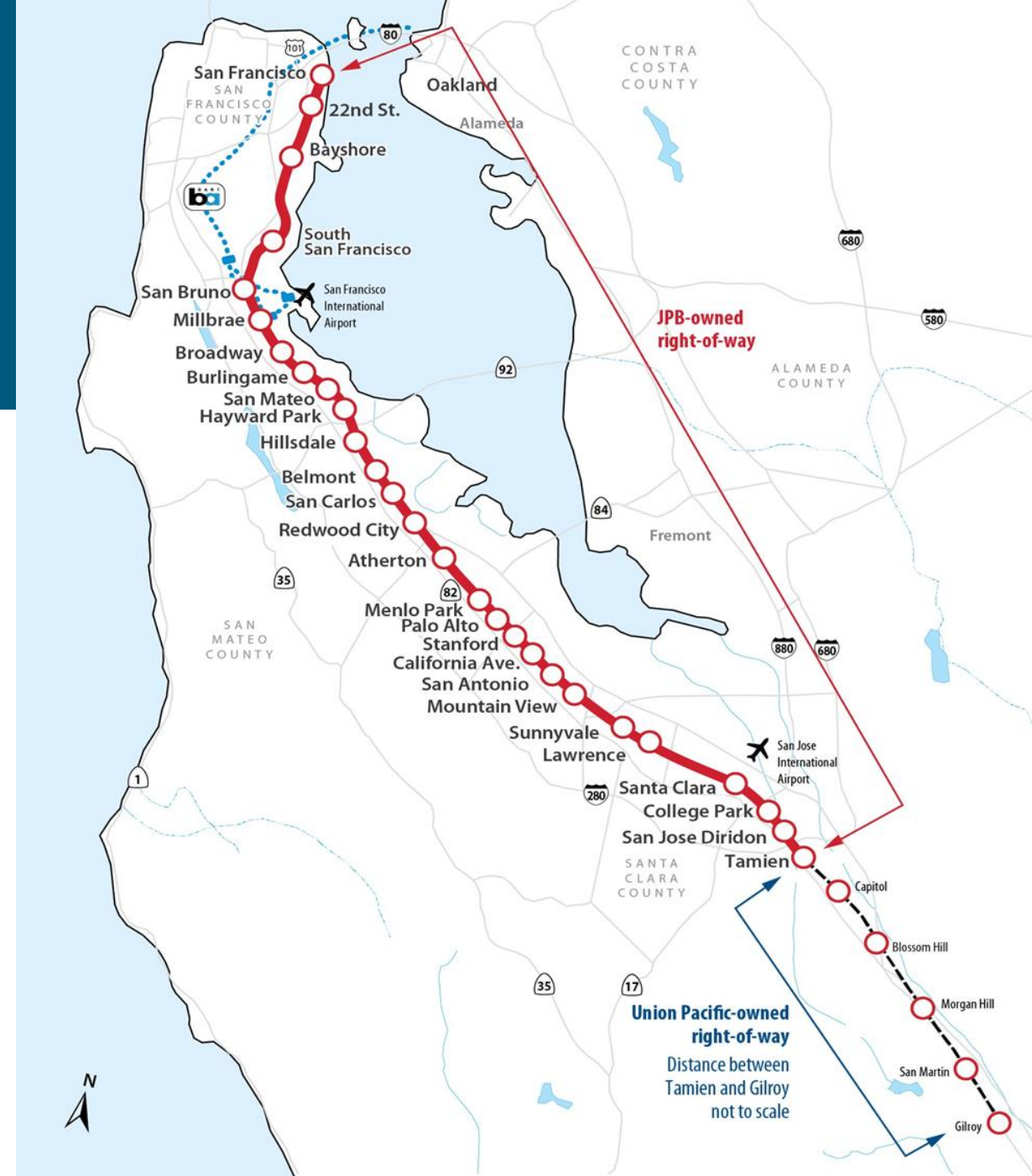
Agenda

Today's Meeting

1. Electrification Update
2. Service Planning Process
3. Market Analysis Summary
4. Proposed Electrified Service Plan
5. Next Steps

About Electrification

- Caltrain has been working diligently with its partners and the local communities to complete the Electrification Project.
 - 51 miles from San Francisco to San Jose (Tamien Station) along JPB-owned right-of-way
 - Electrification has three components:
 - Overhead contact system
 - Traction power facilities
 - Electric trains (19 trainsets by end of 2024; 23 trainsets by 2027)
- First new electric trains have arrived & testing is underway through the next year
- **Caltrain's new electrified service will launch in September 2024 with a completely new schedule!**



Compared to Diesel Service, How Will Electrification Improve Rail Service?



Faster Trains

Electric trains can accelerate/decelerate much faster than diesel trains

Passenger boarding will take less time with more doors available on each train



Improved Frequency

Stations can receive more frequent service throughout the day and express trains during peaks while maintaining competitive travel times



Enhanced Comfort

Smoother, quieter, modern, new electric trains

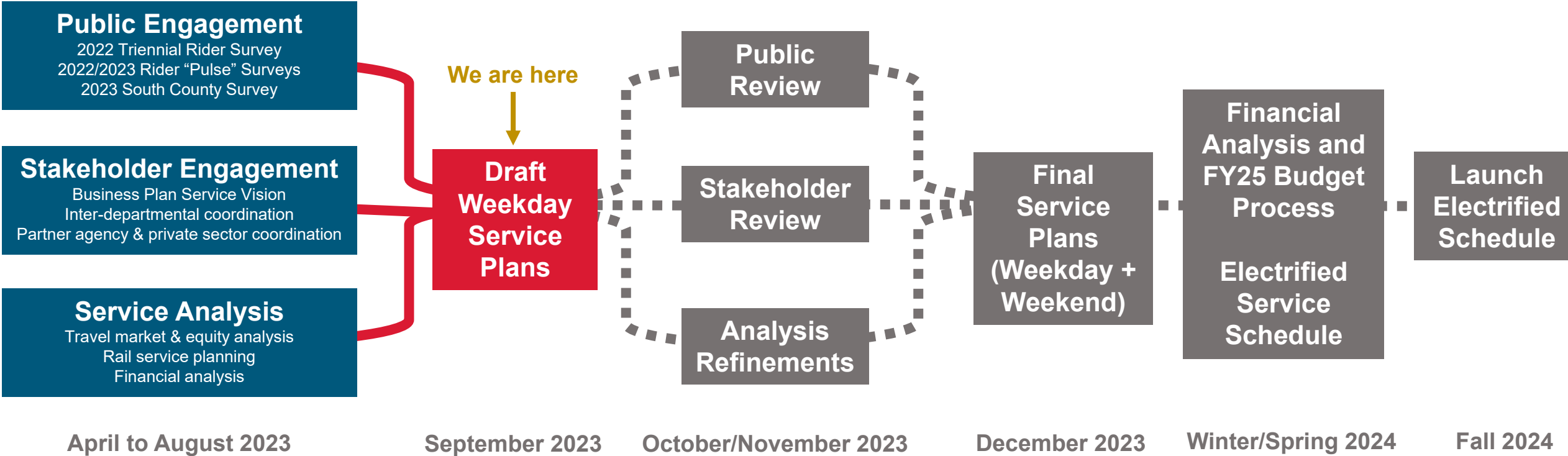


Sustainability

Reduced greenhouse gas emissions and improved air quality

Electrified Service Planning Process

Caltrain launched its electrified service planning process earlier this year, building upon recent and ongoing engagement, policy, and planning efforts.



Electrified Service: Goals & Outcomes

Vision

**Long-Range
Service Vision**
(Caltrain Business Plan)

Goals

Equity

Connectivity

**Recovery &
Growth**

Outcomes

**More Frequent
Service**

Tailor station frequency to market demand and equity goals

**Competitive
Travel Times**

Offer competitive travel times for major markets compared to autos

**Enhanced Off-
Peak Service**

Build ridership markets outside of typical commute trips

**Coordinated
Transfers**

Coordinate connections with BART and other transit operators

**Simplicity &
Legibility**

Provide a schedule that is easy to understand

What Constraints Remain?



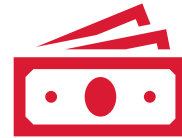
Infrastructure

Caltrain serves a mostly two track corridor with constrained terminal operations, which limits how it can provide service.



Fleet

Caltrain's mixed fleet of diesel and electric trains constrains what kinds of train service can be offered



Operating Budget

Caltrain's constrained operating budget and lower ridership/farebox revenue currently limit service expansion opportunities



Service Coordination

Reduced BART frequency (starting fall 2023) at Millbrae presents challenges for timing transfers

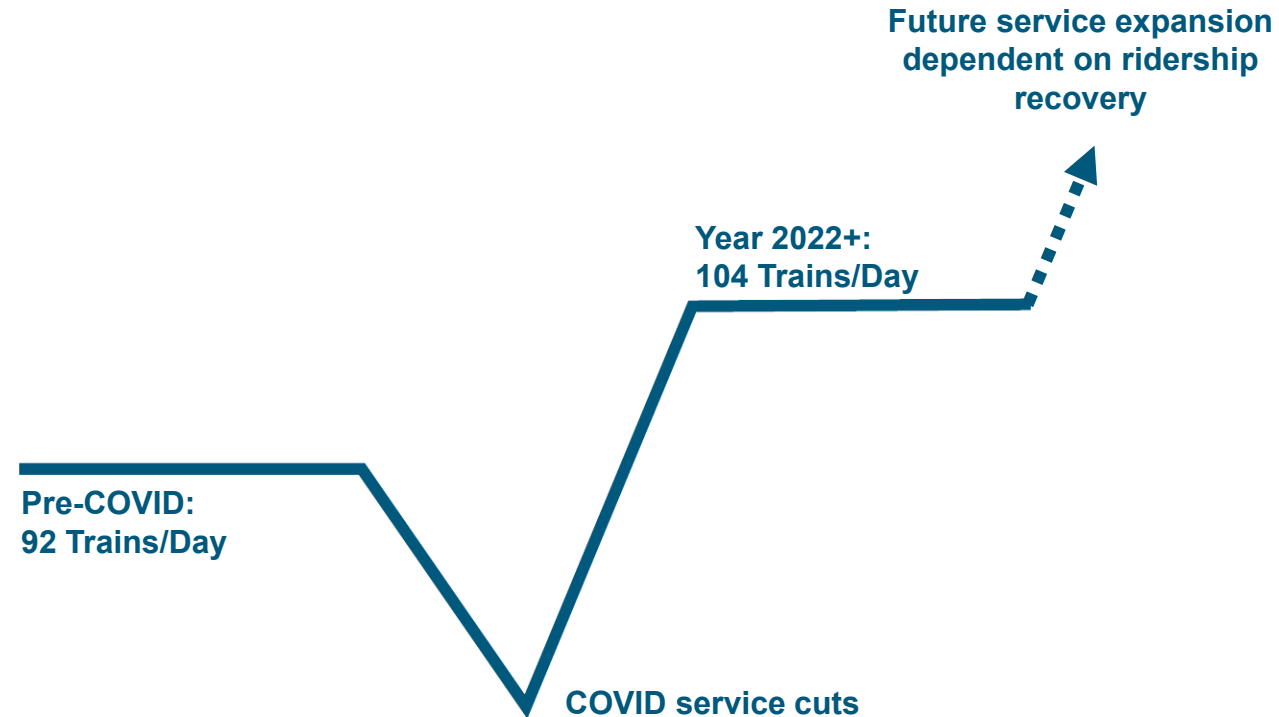
Weekday Electrification Service Levels

Caltrain's budget for FY24-25 (July 2023 – June 2025) is for 104 trains per weekday.

Consistent with the budget, in September 2024, Caltrain's new electrified service will provide 104 trains per weekday (4 trains per peak hour per direction) – with a completely new stopping pattern.

With ridership still recovering from the effects of the pandemic, Caltrain is requesting a waiver from the Federal Transit Administration (FTA) to delay further service expansion until ridership returns. Discussions with FTA have been positive and Caltrain expects to receive the waiver in fall 2023.

Change in Weekday Service Levels over Time



Market Analysis Approach

Results from the market analysis can help inform decision-making about additional station stops – beyond the base level of service – during the peak periods.



Ridership Analysis

Considers current and pre-COVID ridership patterns



Land Use Analysis

Total population and jobs near stations, including recently-completed or under construction projects*



Equity Analysis

Connections to low income and/or minority communities



Transit Connections

Presence of high frequency rail, bus, and shuttle connections

*Based on a review of projects listed on City planning websites in Spring 2023

Candidate Stations for Service Expansion

Based on market analysis, the following stations demonstrate the strongest need for additional service frequency during the peak periods:

- South San Francisco
- San Mateo
- Hillsdale
- Menlo Park
- Sunnyvale
- Lawrence
- Santa Clara

The results of this analysis were incorporated into the service planning process alongside operational considerations.

Stations already at maximum peak service level (4 TPHPD)

Stations demonstrating the strongest need for increased peak service frequency

Station	2023 Caltrain Ridership	Land Use Near Stations	Equity Need	Transit Connections
San Francisco	Light Blue	Light Blue	Light Blue	Light Blue
22nd Street	Light Blue	Light Blue	Light Blue	Light Blue
Bayshore	Light Blue	Light Blue	Light Blue	Light Blue
South San Francisco	Light Blue	Light Blue	Light Blue	Light Blue
San Bruno	Light Blue	Light Blue	Light Blue	Light Blue
Millbrae	Light Blue	Light Blue	Light Blue	Light Blue
Burlingame	Light Blue	Light Blue	Light Blue	Light Blue
San Mateo	Light Blue	Light Blue	Light Blue	Light Blue
Hayward Park	Light Blue	Light Blue	Light Blue	Light Blue
Hillsdale	Light Blue	Light Blue	Light Blue	Light Blue
Belmont	Light Blue	Light Blue	Light Blue	Light Blue
San Carlos	Light Blue	Light Blue	Light Blue	Light Blue
Redwood City	Light Blue	Light Blue	Light Blue	Light Blue
Menlo Park	Light Blue	Light Blue	Light Blue	Light Blue
Palo Alto	Light Blue	Light Blue	Light Blue	Light Blue
California Ave	Light Blue	Light Blue	Light Blue	Light Blue
San Antonio	Light Blue	Light Blue	Light Blue	Light Blue
Mountain View	Light Blue	Light Blue	Light Blue	Light Blue
Sunnyvale	Light Blue	Light Blue	Light Blue	Light Blue
Lawrence	Light Blue	Light Blue	Light Blue	Light Blue
Santa Clara	Light Blue	Light Blue	Light Blue	Light Blue
San Jose	Light Blue	Light Blue	Light Blue	Light Blue
Tamien	Light Blue	Light Blue	Light Blue	Light Blue
Capitol	Light Blue	Light Blue	Light Blue	Light Blue
Blossom Hill	Light Blue	Light Blue	Light Blue	Light Blue
Morgan Hill	Light Blue	Light Blue	Light Blue	Light Blue
San Martin	Light Blue	Light Blue	Light Blue	Light Blue
Gilroy	Light Blue	Light Blue	Light Blue	Light Blue



Proposed Weekday Peak Period Service Concept

(San Francisco to San Jose)

Faster service *and* more stops with all-electric trains

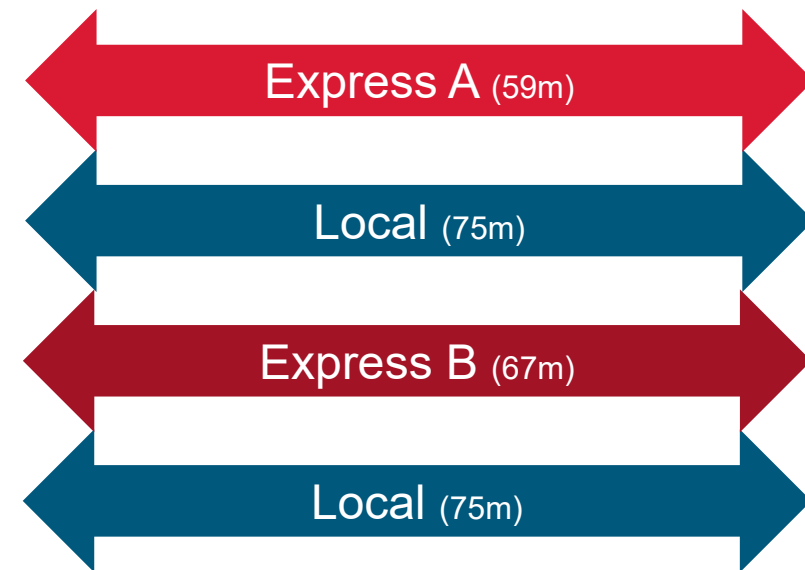
- 4 trains per hour per direction
- Alternating express and local trains
- SF-SJ travel times of 59 to 75 minutes*
- 20% increase in stops at stations

Weekday Peak Hour

Approximately
6:30am-9:30am and 3pm-7pm

San Francisco
4th & King

San Jose
Diridon



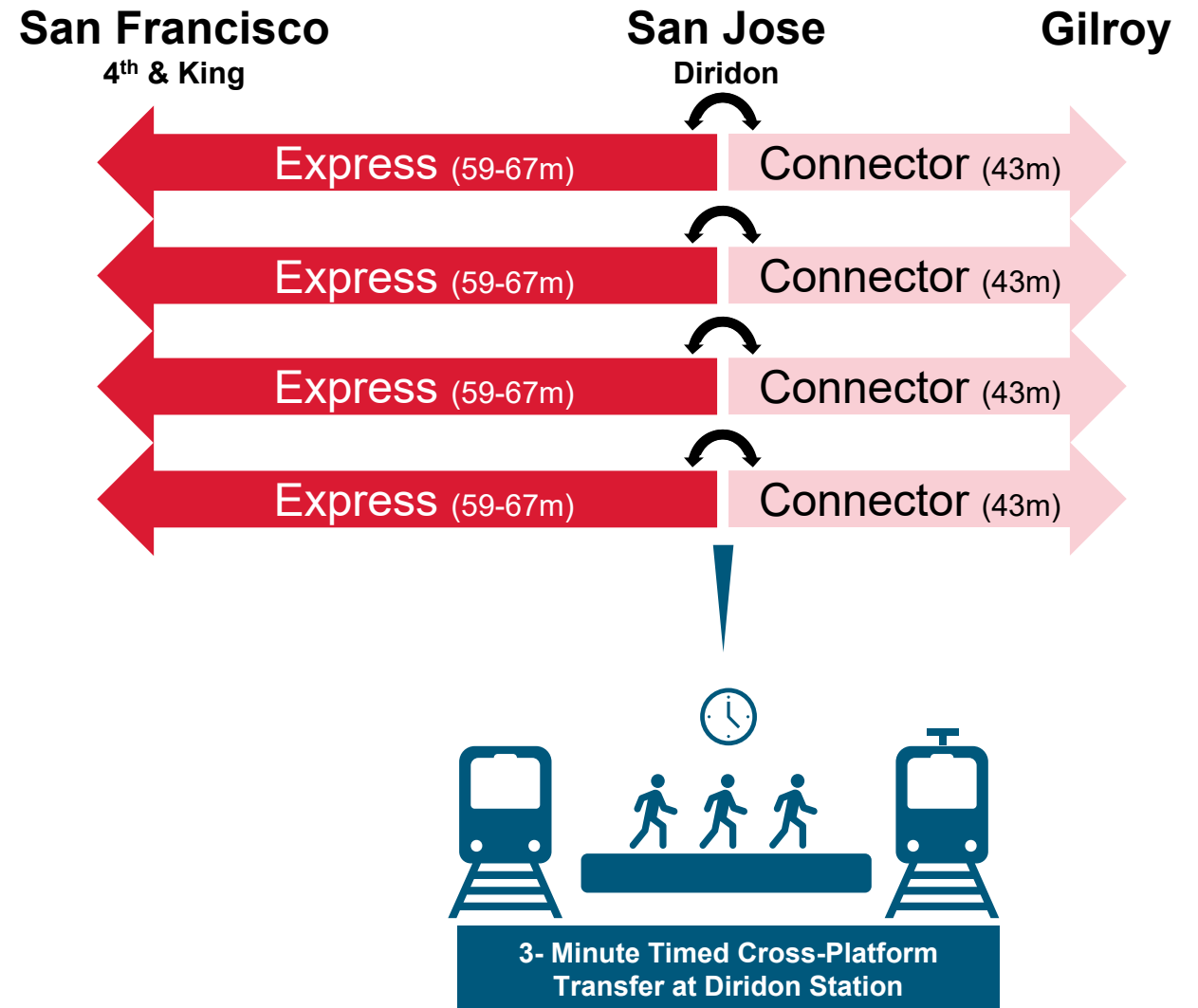
*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.

Proposed Weekday Peak Period Concept for South County Connector (San Jose to Gilroy)

Service Tailored to Community Needs

- 4 daily roundtrips (schedules tailored to survey feedback from South County residents in June 2023)
- Timed cross-platform transfer to Express Trains (3-minute connection) at Diridon Station
- SF-Gilroy travel times of 102-110 minutes, a reduction of up to 28 minutes compared to existing service
- Maximizes flexibility within constraints imposed by agreement with Union Pacific

4 Daily Roundtrips with Timed Cross-Platform Connection



*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.

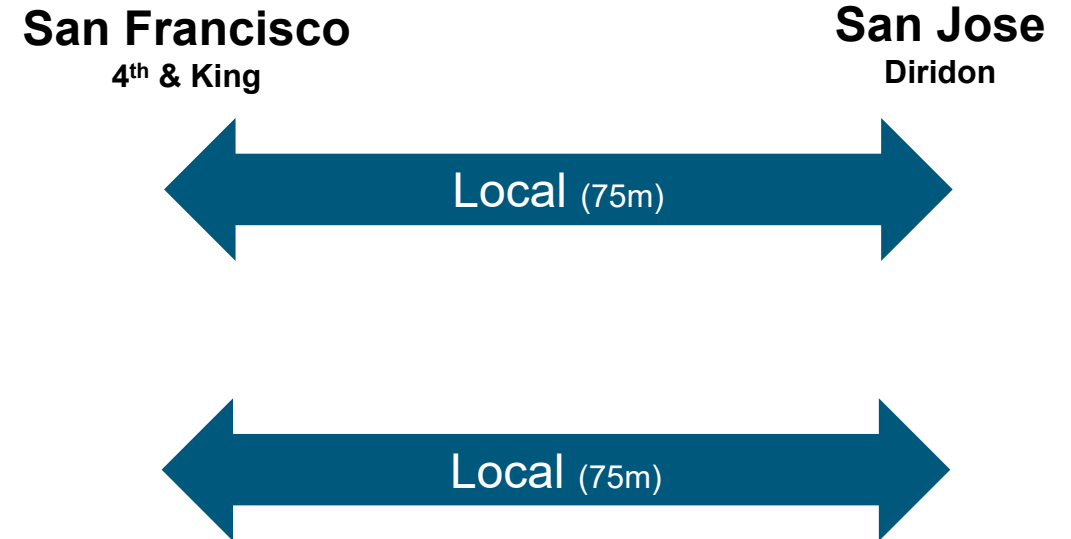
Proposed Weekday Off-Peak Service Concept

(San Francisco to San Jose)

Half-Hourly Off-Peak Service at All Stations

- All stations receive half-hourly local service throughout the day
- SF-SJ travel times of 75 minutes
- Fully electrified service – all electric trains

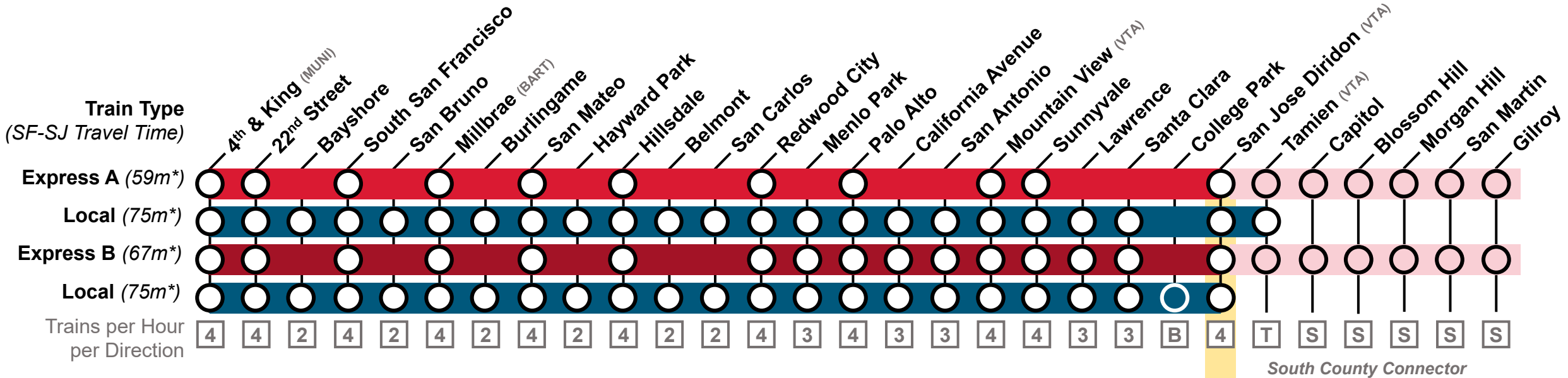
Weekday Off-Peak Hour
Approximately 5-6:30am,
9:30am-3pm, and
7pm-1am



*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.

Proposed Weekday Peak Hour Station Service Levels

Peak periods vary by station, generally covering 6:30am-9:30am and 3-7pm on weekdays



LEGEND

- Stop (one per hour per direction)
- # Stops per hour per direction
- T Tamien Service
2 to 3 stops per hour in peak direction, 1 stop per hour in reverse-peak direction
- B Bellarmine Service
2 stops per day per direction
- S South County Connector Service
4 stops per day per direction with 1-2 trains per hour in the peak direction

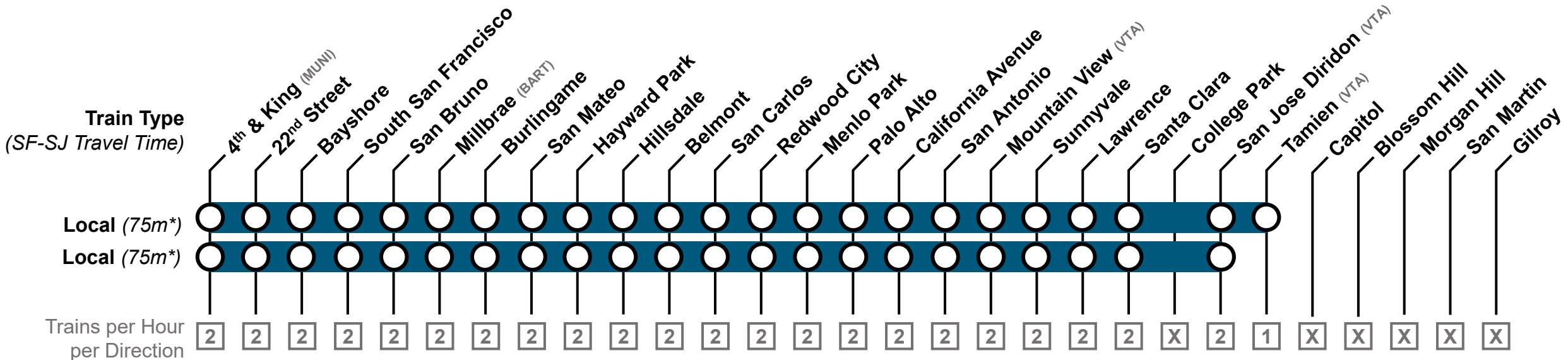
Timed Cross-Platform Connection
Between South County Connector trains and Express trains in both directions

*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.



Proposed Weekday Off-Peak Hour Station Service Levels

Off-peak periods generally 5am-6:30am, 9:30am-3pm, and 7pm-1am



LEGEND

- Stop (one per hour per direction)
- # Stops per hour per direction
- X No Service
Peak Period service only

*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.



Faster Service



Note: Top speed remains 79 MPH but enhanced acceleration / deceleration capabilities improve overall speed

Express Service

- San Francisco to San Jose <60 mins (rush hour drive time ~90 mins)
- Increase from 7 to 11 Express stations

Local Service

- Save 25 mins from San Francisco to San Jose

Gilroy/Morgan Hill Service

- Save up to 28 mins to San Francisco

*Travel times subject to change pending further testing as new electric trains arrive and are prepared for revenue service.

More Train Stops



Note: These high-performance electric trains accelerate/decelerate faster than diesel trains, which enables Caltrain to provide more stops without additional trains.

- Show up and go, don't need a schedule all day/evening
- 20 percent more stops at individual stations
- 11 stations: 4 trains per peak hour
- 5 stations: 3 trains per peak hour
- All stations: train at least every 30 mins
- Equity benefits:
 - 27% more stops at equity priority stations
 - 23% more stops at stations serving minority riders
 - 16% more stops at stations serving low-income riders

Clean, Green, & Serene



*Zero emission corridor planned for the future
Gilroy/Morgan Hill service with Battery EMUs

- Reduces Caltrain's greenhouse gas emissions by 250K MTCO₂ per year
- Improved air quality
- Quieter trains

1st Class Experience For Everyone

- Technology: Free Wi-Fi, outlets at every seat, digital displays
- Quality: Well-designed environment, smoother ride, secure, pleasant lighting, better storage, and spacious bathroom (with a baby changing table)
- Convenient: Simplified schedule, faster, and reliable



Next Steps

2023

September

- Proposed Service Plan shared with stakeholder groups and at community events.

October

- Proposed Service Plan shared with Caltrain Board.
- More community tabling events to share Proposed Service Plan.
- Feedback used to revise service ideas for Final Service Plan.

November – December

- Final Service Plan shared with the public and Caltrain Board.

2024

Spring

- Corridor fully electrified, electric train testing, FY25 budget process, finalizing electrified service schedule.

Summer

- Service plan testing, more electric trains arrive.

Fall

- Electrified service open for riders, using new Final Service Plan!

FOR MORE INFORMATION

WWW.CALTRAIN.COM



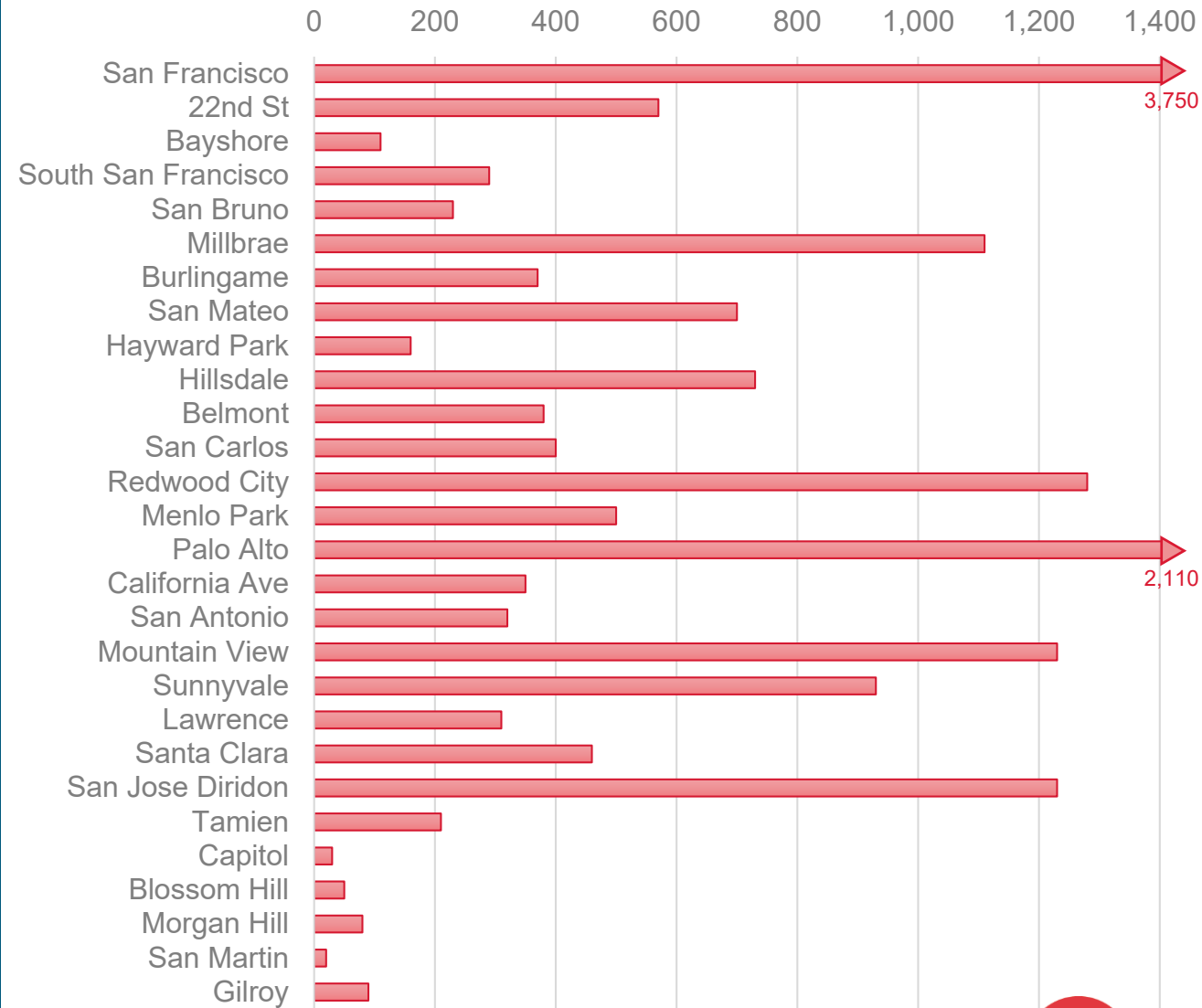
Appendix

Ridership Analysis

Caltrain's current ridership remains focused around key stations:

- San Francisco
- Millbrae
- Redwood City
- Palo Alto
- Mountain View
- Sunnyvale
- San Jose Diridon

Average Weekday Ridership by Station (2023)



Ridership estimates based on Clipper data and limited conductor counts Jan-Mar 2023

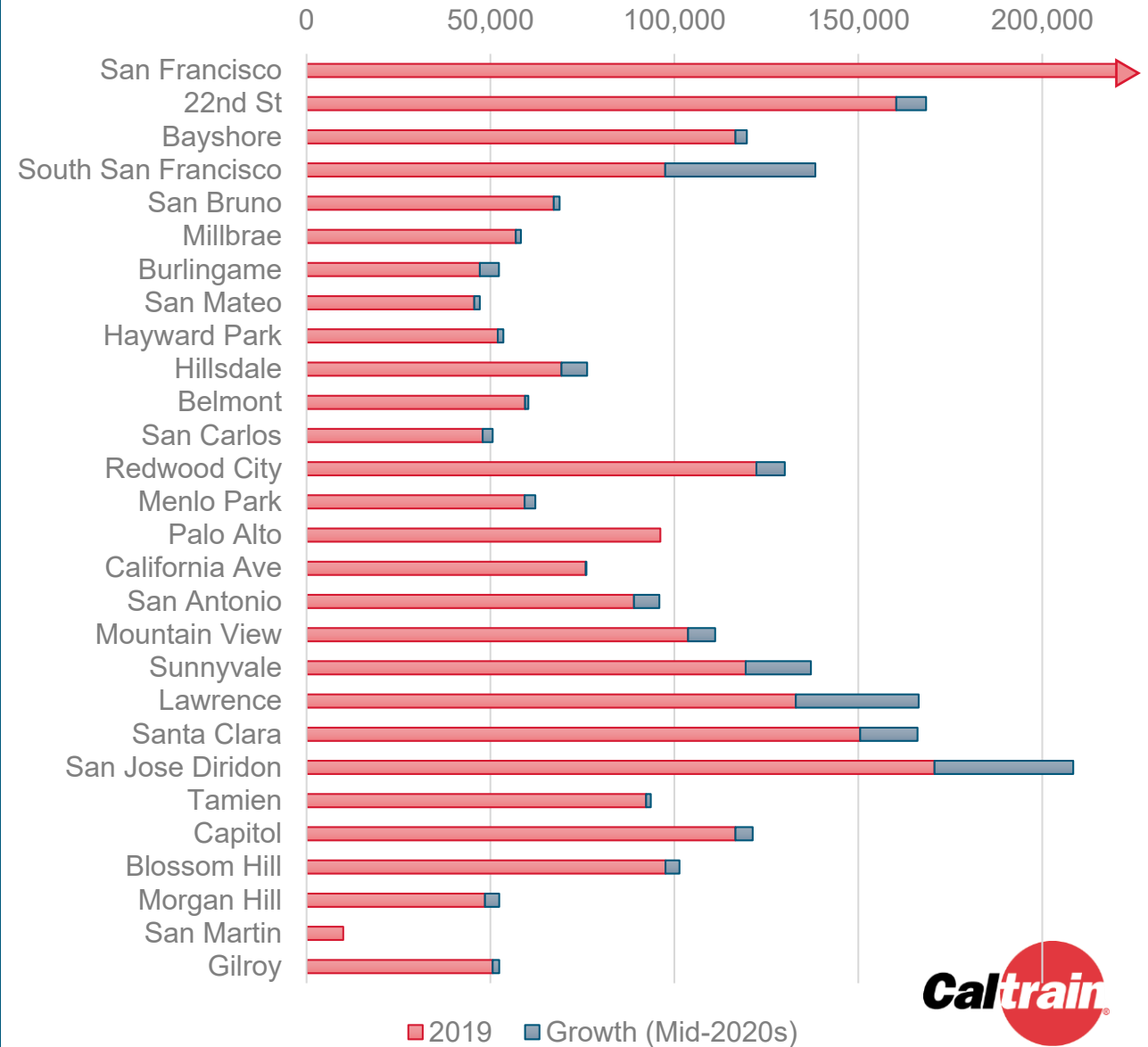
Land Use Analysis

Proximity to population and jobs is an indicator of potential latent demand for Caltrain.

Some Caltrain station areas are experiencing substantial growth, particularly:

- South San Francisco
- Sunnyvale
- Lawrence
- Santa Clara
- San Jose Diridon

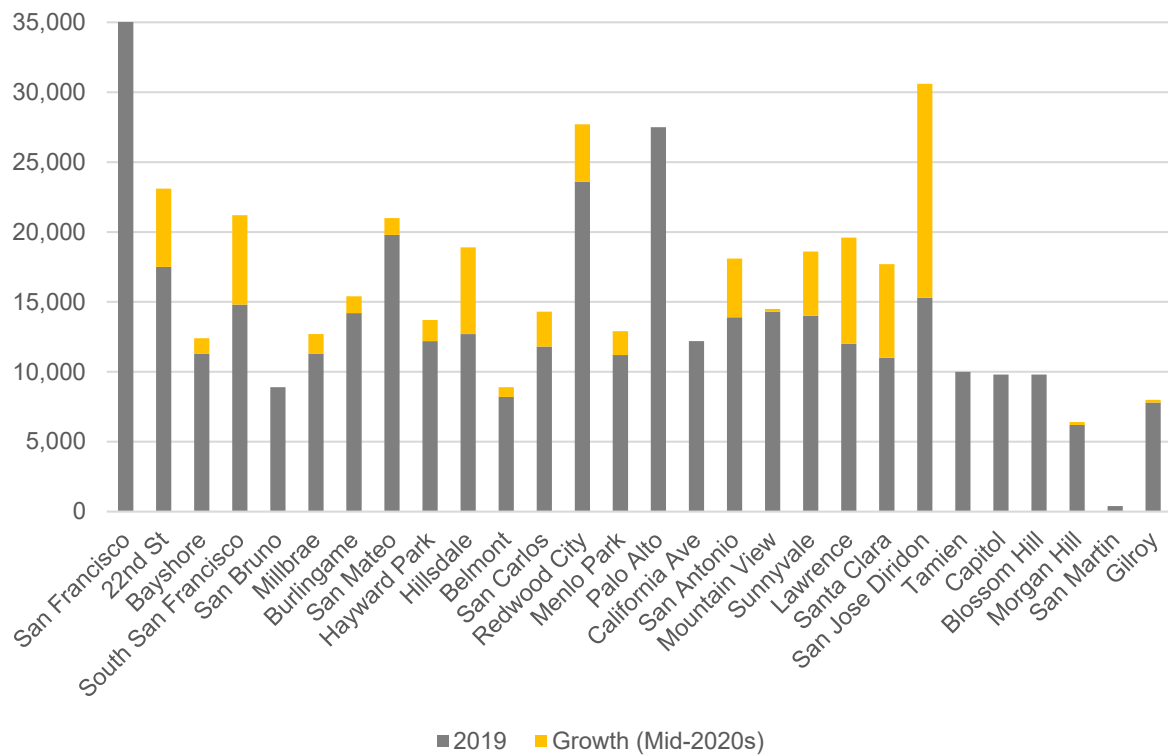
Population and Jobs within 2 Miles of Caltrain Stations: Mid-2020s Estimate



Growth based on inventory of projects under construction or completed since 2019

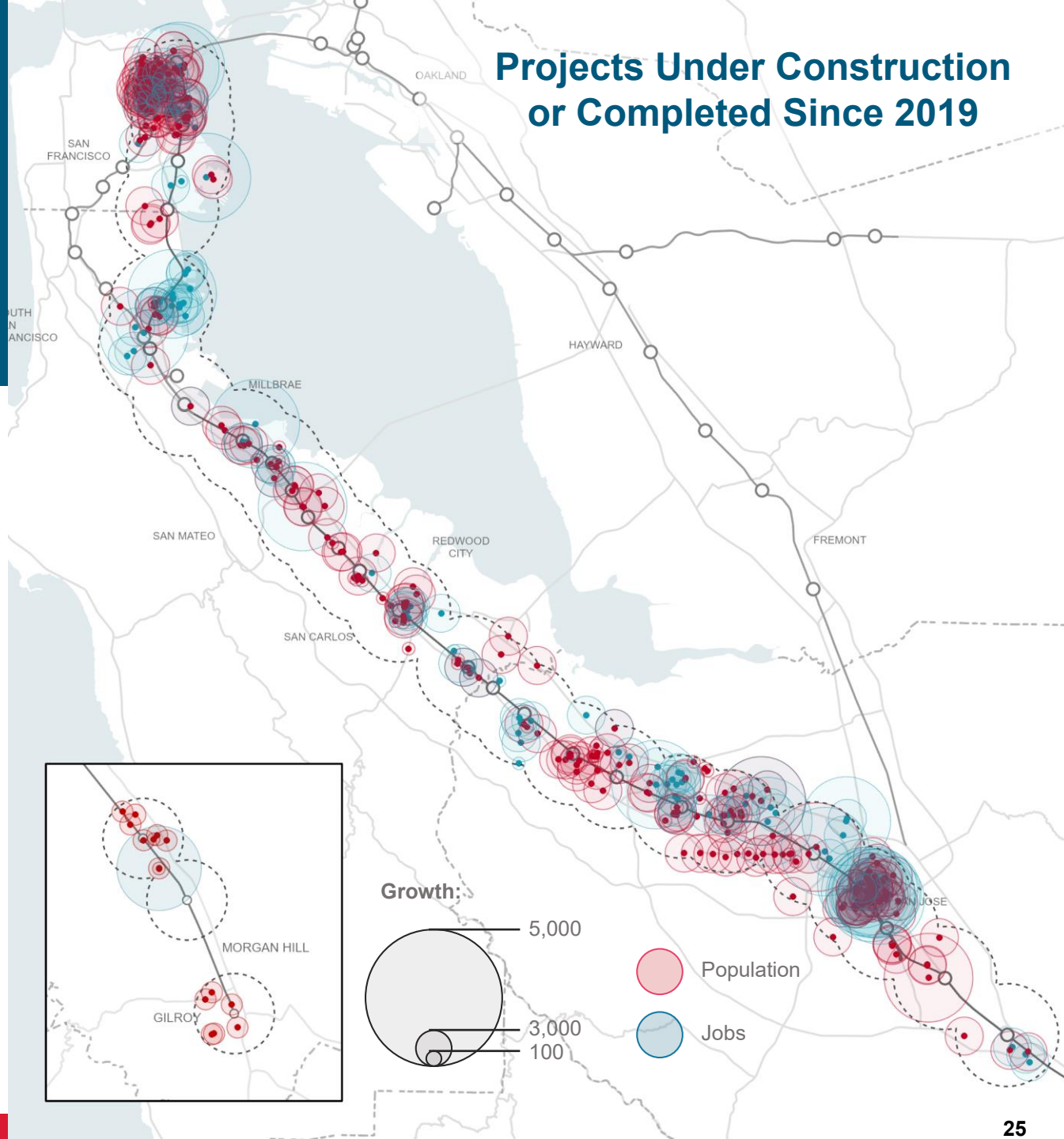
Corridor Development Inventory

Population and Jobs within 1/2 Mile of Caltrain Stations:
Mid-2020s Estimate



Growth based on inventory of projects under construction or completed since 2019

Projects Under Construction or Completed Since 2019

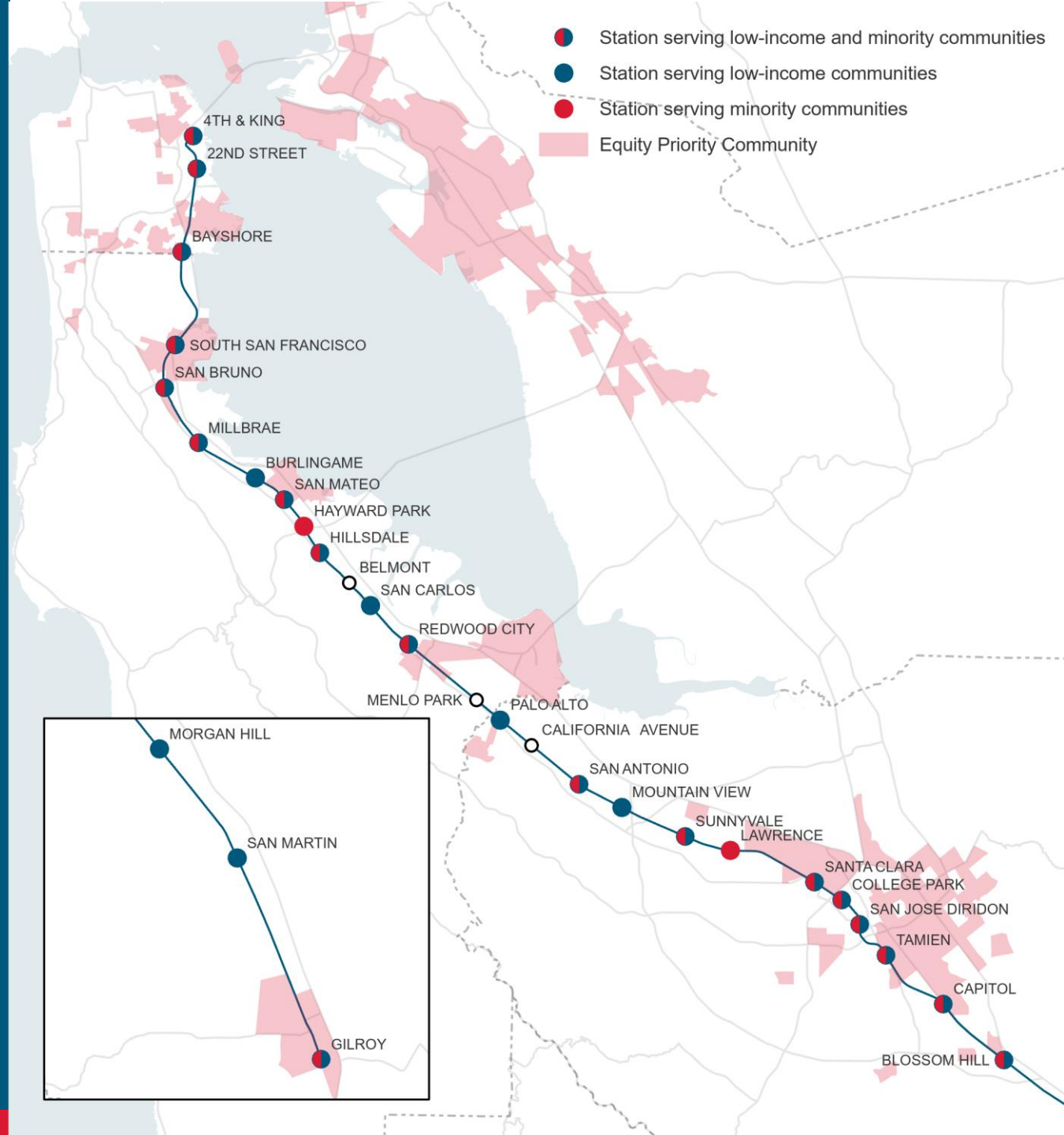


Equity Need

The Metropolitan Transportation Commission designates Equity Priority Communities across the region. Caltrain also identifies specific stations that serve minority or low-income riders for Title VI purposes.

Caltrain has historically underserved the following stations that serve equity priority populations:

- Bayshore
- South San Francisco
- San Bruno
- San Mateo
- Menlo Park
- Sunnyvale
- Lawrence
- Santa Clara
- Tamien
- Capitol
- Blossom Hill
- Gilroy



Transit Connections

Most Caltrain stations include connections to other transit operators that serve communities along the Caltrain corridor, including but not limited to:

- ACE
- BART
- Capitol Corridor
- Commute.org
- SamTrans
- SFMTA
- VTA

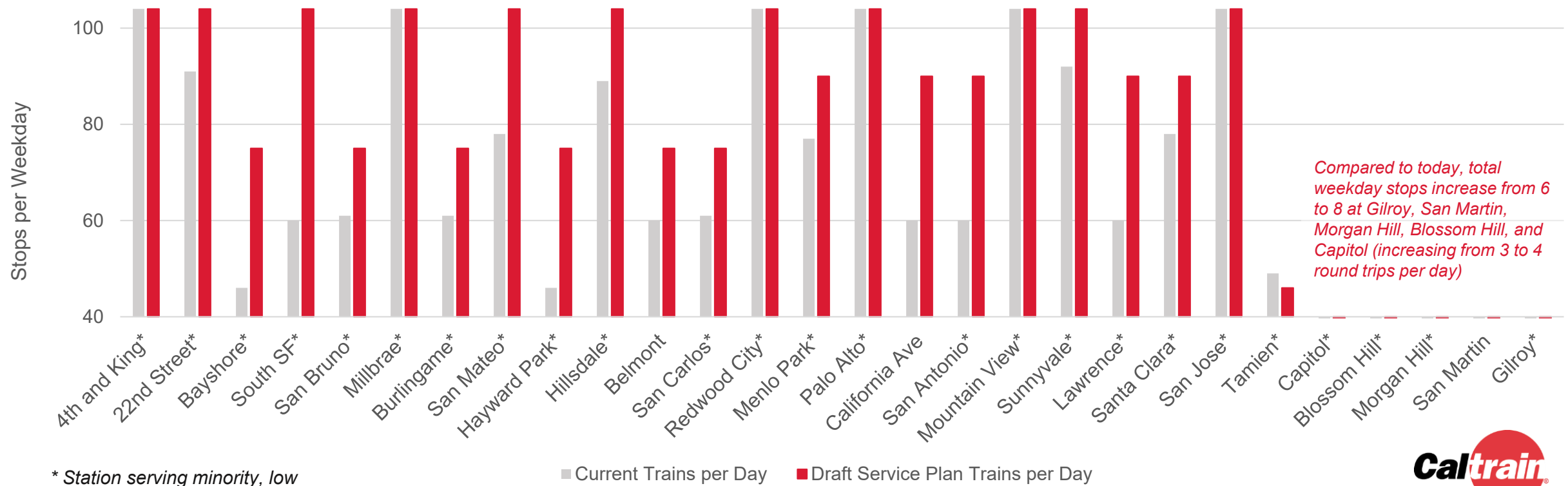
Caltrain Station	Connecting Transit Operator(s)	Other Transit Operators' Peak Hour Trips per Direction
San Francisco	SFMTA	28
22nd Street	SFMTA	7
Bayshore	Commute.org	3
South San Francisco	SamTrans, Commute.org, City Shuttle	17
San Bruno	SamTrans	2
Millbrae	BART, SamTrans, Commute.org	17
Burlingame	SamTrans	2
San Mateo	SamTrans	4
Hayward Park	Commute.org	1
Hillsdale	SamTrans, Commute.org	13
Belmont	SamTrans	6
San Carlos	SamTrans	6
Redwood City	SamTrans, Commute.org	22
Menlo Park	SamTrans, City Shuttle	10
Palo Alto	VTA, SamTrans, Stanford, Dumbarton	68
California Ave	VTA	1
San Antonio	VTA	2
Mountain View	VTA , MVGO Shuttle	36
Sunnyvale	VTA	13
Lawrence	-	-
Santa Clara	VTA, ACE, Capitol Corridor	24
San Jose Diridon	VTA , ACE, Capitol Corridor, Highway 17 Express	27
Tamien	VTA	9
Capitol	VTA	7
Blossom Hill	VTA	2
Morgan Hill	VTA	7
San Martin	VTA	6
Gilroy	VTA, County Express	11

Gray = Caltrain stations with greater than 10 peak hour trips from connecting transit operators

Weekday Stop Frequency by Station

Total weekday stops increase by 20% corridor-wide

Weekday Stops per Station (Draft Service Plan vs. Existing Service Today)



* Station serving minority, low income, or Equity Priority Community

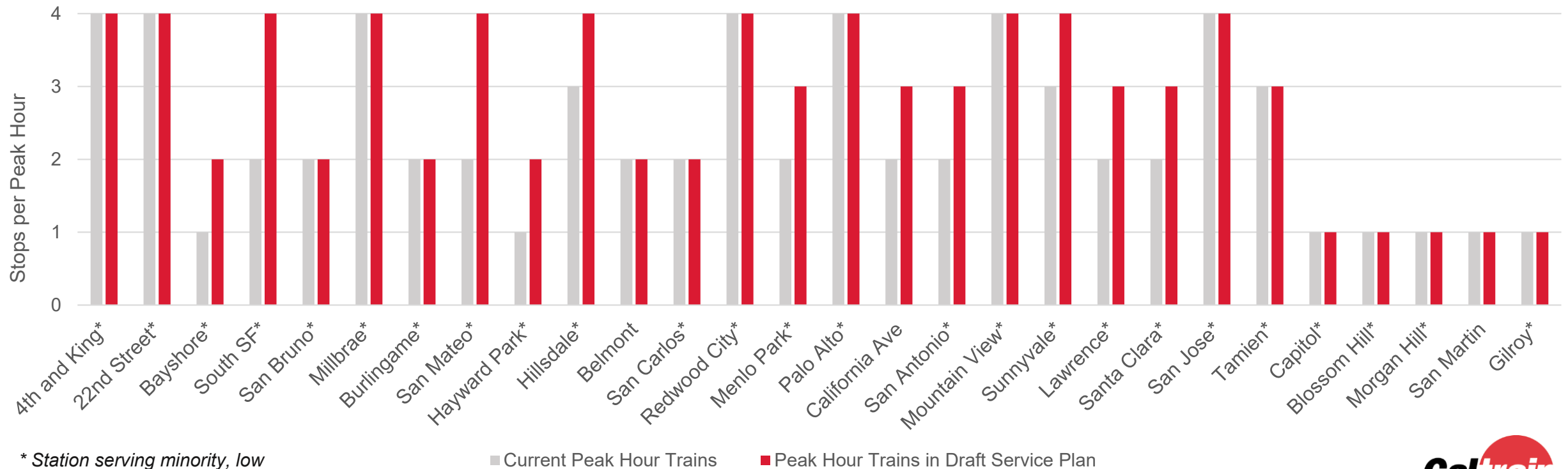
■ Current Trains per Day ■ Draft Service Plan Trains per Day



Weekday Peak Hour Stop Frequency

Total peak hour stops increase by 20% corridor-wide

Weekday Peak Hour Stops per Station (Draft Service Plan vs. Existing Service Today)



* Station serving minority, low income, or Equity Priority Community

■ Current Peak Hour Trains ■ Peak Hour Trains in Draft Service Plan

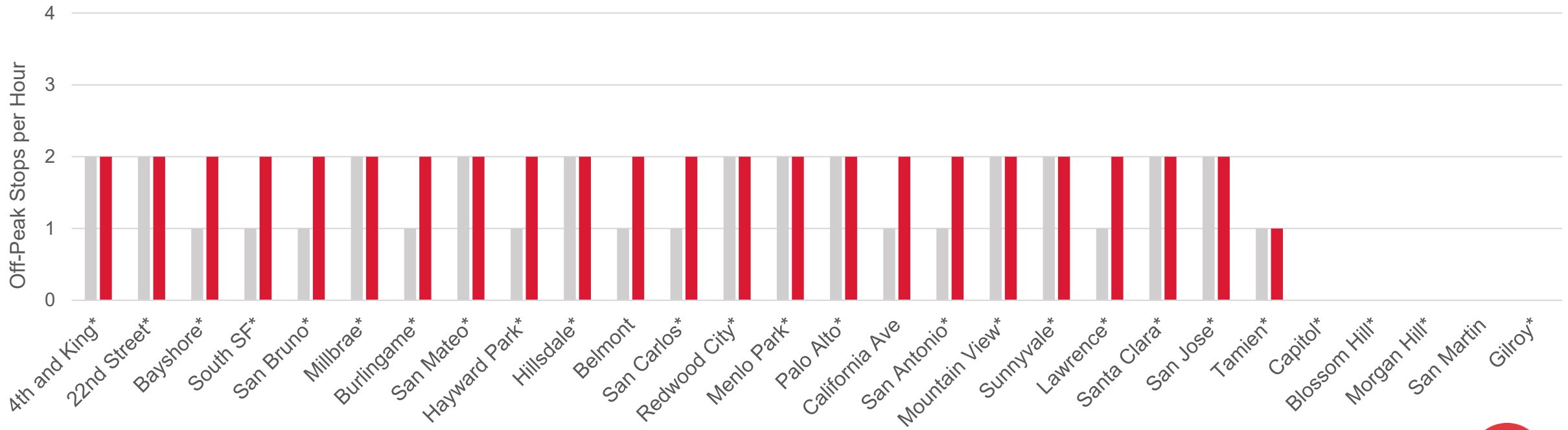


*22nd St: 4 TPH peak direction, 2 TPH reverse-peak direction. Tamien: 2-3 TPH peak direction, 1 TPH reverse-peak direction.

Off-Peak Stop Frequency

Total off-peak stops per hour increase by 30% corridor-wide

Draft Service Plan Off Peak Trains per Hour



* Station serving minority, low income, or Equity Priority Community

■ Current Off-Peak Trains per Hour

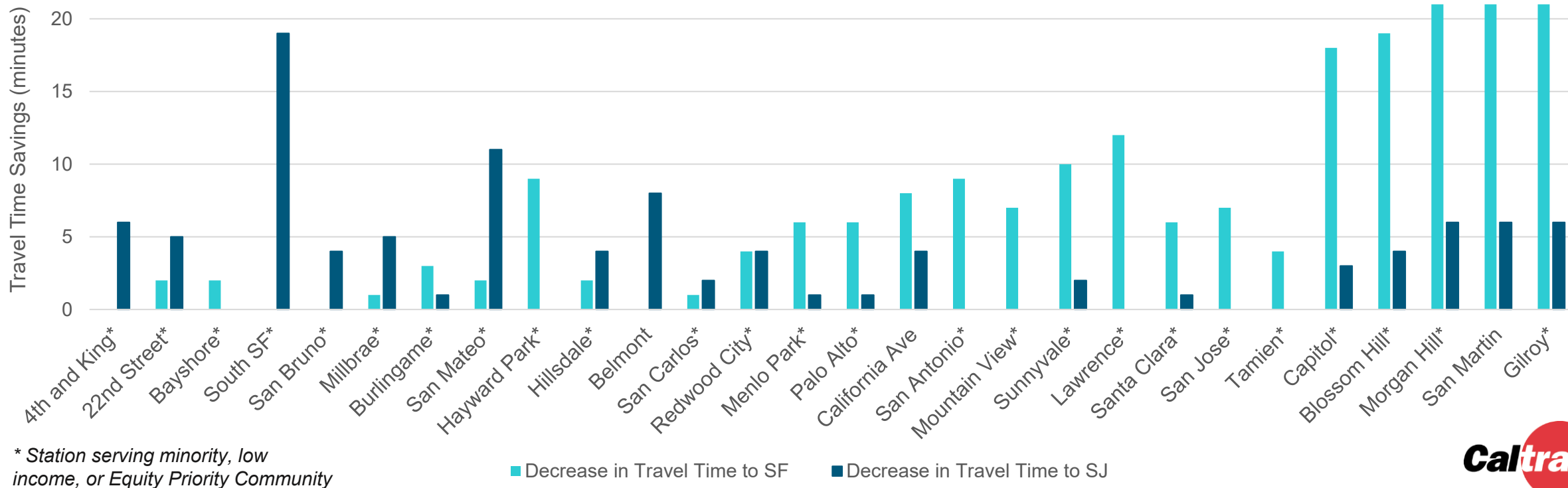
■ Off-Peak Trains per Hour in Draft Service Plan



Travel Time Savings to SF & SJ

Most stations will see 3 to 5 minutes of savings to San Francisco or San Jose (comparing the fastest trains)

Reduction in Travel Time for Fastest Trip (Draft Service Plan)



* Station serving minority, low income, or Equity Priority Community



Southern Santa Clara County Corridor Survey: **Priorities**

- Online survey for South County was conducted in June 2023 and targeted residents in those communities; 1,552 responses received
- Respondents ranked frequency, later morning service, and shorter travel time as top priorities
- 85% of passengers traveled within Santa Clara County or southern San Mateo County (<10% traveled to San Francisco)*

Service Improvement Preferences in Ranking Order

	Frequency	Earlier AM service	Later AM service	Earlier PM service	Later PM service	Shorter trip time	One seat ride
Capitol	1	4	3	6	7	2	5
Blossom Hill	1	5	2	4	7	3	6
Morgan Hill	1	5	2	6	4	3	7
San Martin	1	5	2	4	6	3	7
Gilroy	1	4	2	5	6	3	7

Ranking Order: 1=most requested improvement; 7=least requested improvement



*Data from 2022 Triennial Survey



CALIFORNIA High-Speed Rail Authority

Memorandum

Date: September 28, 2023
To: Local Policy Maker Group (LPMG)
From: Boris Lipkin, Northern California Regional Director
Re: California High-Speed Rail Program Update

STATEWIDE UPDATE

Authority Moves Closer to Buying First Trainsets

In August, the Authority's Board of Directors took a major step toward bringing high-speed rail service to California by approving the release of a Request for Qualifications (RFQ) to industry for the nation's first 220 mph electrified high-speed trainsets, initiating a two-step procurement process. The Authority anticipates getting Statements of Qualifications (SOQs) from prospective trainset manufacturers in November 2023. Once received, the Authority will evaluate the SOQs and create a shortlist of qualified teams capable of delivering high-speed trainsets and release a Request for Proposal in the first quarter of 2024 to qualified teams. The graphic below summarizes the trainset procurement process, from this first step of releasing the RFQ to revenue operations.

Procurement



- Request for Qualifications (RFQ) for 6 high-speed trainsets to industry.
- Request for Proposal (RFP) in Q1 2024.

Delivery



- Receive two prototypes in 2028.
- Supports testing up to 242 mph, operating at 220 mph.

Revenue Service



- Additional four trainsets by the end of 2030.
- Supports revenue operations on 171-mile Merced to Bakersfield section.

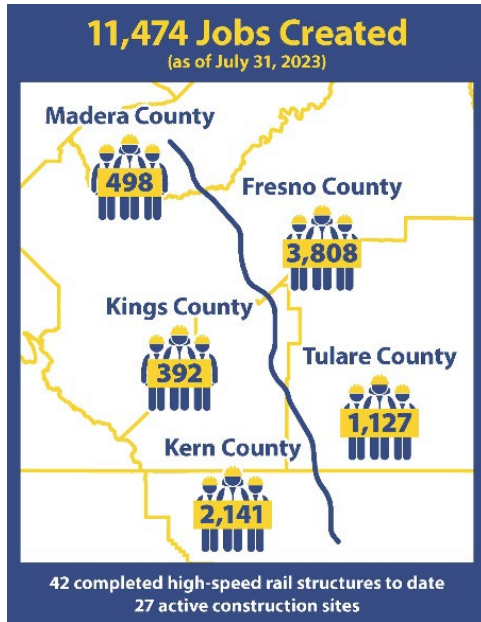


Northern California Update to the Authority Board

Northern California Regional Director Boris Lipkin provided an update to the Authority Board during their August Board Meeting. The presentation focused on updates that have occurred since 2022 when the Authority achieved a major milestone in Northern California by completing environmental clearance for the region's approximately 135 miles of future high-speed rail. Since then, the Authority has applied for federal funding to advance the design and complete geotechnical investigations on the San Jose to Merced segment, with an award decision anticipated late this year. The presentation also included updates on strong ongoing regional partnerships that continue in the meantime, as well as highlights from public outreach and stakeholder engagement from the past year. The Board Meeting can be viewed online [here](#) and a copy of the presentation is available [here](#).

Authority Celebrates 10 Year Partnership with the Construction Trades

Over Labor Day, the Authority recognized 10 years of collaborative partnership with the members of skilled craft unions who are diligently working to bring the first electrified high-speed rail system to the United States. This partnership is possible thanks in part to the establishment of the Authority's Community Benefits Agreement, signed and executed in 2013, that promotes employment and business opportunities during construction while advancing training opportunities to targeted and disadvantaged workers. The Authority's Community Benefits Agreement has helped create thousands of good-paying union jobs to date, with more than 1,300 skilled workers dispatched to a high-speed rail construction site each day. Nearly 75% of the jobs created on the project go directly to individuals from disadvantaged communities. The agreement applies to current and future construction segments of the 500-mile Los Angeles to San Francisco project, and as of July 31, 2023, there have been 11,474 high-speed rail construction and labor jobs created.



RECENT & UPCOMING OUTREACH ACTIVITIES IN NORTHERN CALIFORNIA

- Creekside Socials – September 11, 11:00am-3:00pm
- Viva CalleSJ – September 10, 10:00am – 3:00pm
- Caltrain Electric Train Tour – September 23, 10:00am-2:00pm
- TJPA's Transit Month Event – September 27, 11:30am-2:00pm
- Oakland Día de los Muertos – October 29, 10:00am-5:00pm