



JPB Finance Committee
Meeting of July 22, 2024

Supplemental Reading File

Subject

1. Accept On-Call Alternate Project Delivery Negotiation Support Services Update
2. Accept On-Call Communication and Signal Services Update
3. Accept On-Call Construction Management Services Update
4. Accept On-Call General Engineering Consultant Design Services Update
5. Accept On-Call Management of Soil, Hazardous Waste and Other Environmental Compliance Services Update
6. Accept On-Call Program Management Oversight Services Update
7. Accept On-Call Transportation Planning and Consultant Support Services Update
8. Contracts and Procurement Quarterly Reports
9. Title VI Fare Equity Analysis for 2024 Proposed Fare Changes - \$1 Youth Fares

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Connie Tung, Contract Administrator, Rail Contracts & Budget
Mehdi Tavakolizadeh, Manager, Project Estimates, Capital Program Management
Subject: **Accept On-Call Alternative Project Delivery Negotiation Support Services Update**

Finance Committee Recommendation Technology, Operations, Planning, and Safety Committee Recommendation Advocacy and Major Projects Committee Recommendation

Purpose and Recommended Action

This report is for information only. No Board action is required.

Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from January 4th, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to the vendor. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2023-75, the Board of Directors (Board) awarded contracts to Kelly McNutt Consulting LLC, consisting of a five-year base term for an aggregate not-to-exceed amount of \$2,500,000 with up to two (2), one (1)-year option terms for a total not-to exceed additional amount of \$1 million.

Prepared By:	Connie Tung	Contract Administrator, Rail Contracts & Budget	650-508-6371
	Mehdi Tavakolizadeh	Manager, Project Estimates, Capital Program Management	650-508-6273

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	\$3,500,000
Exercised:	5.0	\$2,500,000
Work Directives Issued:		\$1,257,527
Remaining Exercised Capacity:		\$1,242,473

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1823	154	8%	50%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	1/4/2024	12/31/2028	5.0	\$2,500,000	2023-75
Option #1	1/1/2029	12/31/2029	1.0	\$500,000	2023-75
Option #2	1/1/2030	12/31/2030	1.0	\$500,000	2023-75
Amendment					
Total:			7.0	\$3,500,000	

Table 4

Vendor	Kelly McNutt Consulting LLC	TOTAL
Contract #	24-J-P-016	
Total WDs Issued	\$1,257,527	\$1,257,527
Previous Reporting Period	\$0	\$0
Current Reporting Period	\$1,257,527	\$1,257,527

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
11472	Broadway Burlingame Grade Separation Negotiation Support	Alternative Project Delivery Support Consultant to provide cost estimating, constructability review, scheduling, risk analysis and negotiation support.	Kelly McNutt Consulting, LLC	6/5/24	4/2/24	12/31/28	\$1,257,527
TOTAL AMOUNT THIS PERIOD							\$1,257,527

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Lawrence Leung, Manager, Rail Contracts & Budget
Bin Zhang, Director, Caltrain Engineering
Subject: **Accept On-Call Communication and Signal Services Update**

Finance Committee Recommendation Technology, Operations, Planning, and Safety Committee Recommendation Advocacy and Major Projects Committee Recommendation

Purpose and Recommended Action

This report is for information only. No Board action is required.

Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from March 16th, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2022-37, the Board of Directors (Board) awarded contracts to RSE Corporation, STV Incorporated, WSP USA, Inc., and Xorail, Inc., consisting of a five-year base term for an aggregate not-to-exceed amount of \$18,000,000.

Prepared By: Lawrence Leung Manager, Rail Contracts & Budget 650-508-6328
Bin Zhang Director, Caltrain Engineering 650-508-7999

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.0	\$18,000,000
Work Directives Issued:		\$9,518,737
Remaining Exercised Capacity:		\$8,481,263

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	671	37%	53%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	8/4/2022	8/3/2027	5.0	\$18,000,000	2022-37
Amendment			0.0		
Total:			5.0	\$18,000,000	

Table 4

Vendor	RSE	STV	WSP	Xorail	TOTAL
Contract #	22-J-P-024A	22-J-P-024B	22-J-P-024C	22-J-P-024D	
Total WDs Issued	\$8,818,243	\$700,495	\$0	\$0	\$9,518,737
Previous Reporting Period	\$8,615,947	\$700,495	\$0	\$0	\$9,316,441
Current Reporting Period	\$202,296	\$0	\$0	\$0	\$202,296

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
10859	Crossing Optimization	Support to acquire dedicated signal system engineering support services for Caltrain’s Crossing Optimization Project and PCEP Signal, 2 speed check implementation. A2 added \$405k for additional support. A3 added \$88k for additional support. A4 added \$36k for additional support.	RSE	6/27/2024	10/1/2022	6/30/2024	\$35,656
10925	Record of Survey Jerrold Ave Quint St	Support to prepare and file a Record of Survey per the California Professional Land Surveyors Act, Section 8762 for the west line of the PCJPB (Caltrain) right-of-way between Jerrold Avenue and Quint Street in the City and County of San Francisco.	RSE	4/26/2024	4/26/2024	7/31/2024	\$42,688
10926	CAD Drawings for VHF	Support to provide CAD drawings for the following projects: 1. New VHF sites to co-locate with the PTC sites. 2. Passenger Announcement (PA) backhaul replacement. 3. Replacement of ATCS 900 MHz band.	RSE	3/28/2024	3/28/2024	12/31/2024	\$123,952
TOTAL AMOUNT THIS PERIOD							\$202,296

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Connie Tung, Contract Administrator, Rail Contracts & Budget
Alfred Darmousseh, Deputy Director, Construction Services
Subject: **Accept On-Call Construction Management Services Update**

Finance Committee
Recommendation

Technology, Operations, Planning,
and Safety Committee
Recommendation

Advocacy and Major Projects
Committee Recommendation

Purpose and Recommended Action

This report is for information only. No Board action is required.

Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from January 17th, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2024-05, the Board of Directors (Board) awarded contracts to Ghirardelli Associates, Inc., Gannett Fleming, and WSP USA, Inc., consisting of a seven-year base term for an aggregate not-to-exceed amount of \$40,000,000 with no options.

Prepared By:	Connie Tung	Contract Administrator, Rail Contracts & Budget	650-508-6371
	Alfred Darmousseh	Deputy Director, Construction Services	650-551-6120

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	\$40,000,000
Exercised:	7.0	\$40,000,000
Work Directives Issued:		\$1,137,929
Remaining Exercised Capacity:		\$38,862,071

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2556	141	6%	3%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	1/17/2024	1/16/2031	7.0	\$40,000,000	2024-05
Option #1					
Option #2					
Amendment					
Total:			7.0	\$40,000,000	

Table 4

Vendor	Ghirardelli Associates, Inc.	Gannett Fleming, Inc.	WSP USA, Inc.	TOTAL
Contract #	24-J-P-003A	24-J-P-003B	24-J-P-003C	
Total WDs Issued	\$0	\$483,398	\$654,531	\$1,137,929
Previous Reporting Period	\$0	\$483,398	\$605,066	\$1,088,464
Current Reporting Period	\$0		\$49,465	\$49,465

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
11394	Mini-High Platforms Project	Construction management services for the administration of a construction contract for the PCJPB Mini-High Platform Project.	Gannett Fleming	3/4/24	4/4/24	7/1/25	\$483,398
11395	San Mateo Parking Track Project	Construction management services for the administration of a construction contract for the PCJPB San Mateo Replacement Parking Track Project.	WSP USA, Inc.	3/4/24	2/26/24	7/1/25	\$605,066
11491	Central Control Facility HVAC	Construction management services for Central Control Facility (CCF) Heating, Ventilation, and Air Conditioning (HVAC) Installation project.	WSP USA, Inc.	6/5/24	5/17/24	7/1/24	\$49,465
TOTAL AMOUNT THIS PERIOD							\$1,137,929

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Connie Tung, Contract Administrator, Rail Contracts & Budget
Bin Zhang, Acting Director, Caltrain Engineering
Subject: **Accept On-Call General Engineering Consultant Design Services Update**



Finance Committee
Recommendation



Technology, Operations, Planning,
and Safety Committee
Recommendation



Advocacy and Major Projects
Committee Recommendation

Purpose and Recommended Action

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Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from February, 15th, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2024-06, the Board of Directors (Board) awarded contracts to AECOM Technical Services, Inc., HDR Engineering, Inc., and T.Y. Lin International, consisting of a five-year base term for an aggregate not-to-exceed amount of \$50,000,000 with two additional, one-year option terms.

Prepared By:	Connie Tung	Contract Administrator, Rail Contracts & Budget	650-508-6371
	Bin Zhang	Acting Director, Caltrain Engineering	650-508-7999

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	\$50,000,000
Exercised:	5.0	\$50,000,000
Work Directives Issued:		\$451,768
Remaining Exercised Capacity:		\$49,548,232

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1826	111	6%	1%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	2/15/2024	2/14/2029	5.0	\$50,000,000	2024-06
Option #1	2/15/2029	2/14/2030	1.0	\$0	2024-06
Option #2	2/15/2030	2/14/2031	1.0	\$0	2024-06
Amendment					
Total:			7.0	\$50,000,000	

Table 4

Vendor	AECOM Technical Services, Inc.	HDR Engineering, Inc.	T.Y. Lin International	TOTAL
Contract #	24-J-P-010A	24-J-P-010B	24-J-P-010C	
Total WDs Issued	\$451,768	\$0	\$0	\$451,768
Previous Reporting Period	\$0	\$0	\$0	\$0
Current Reporting Period	\$451,768	\$0	\$0	\$451,768

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
11414	Systems Engineering and Integration Technical Support Services	Technical Lead is responsible for supporting Caltrain Systems Engineering (SE) department as an extension of technical team seconded staff, primarily serving as the PADS lead engineer.	AECOM Technical Services, Inc.	6/5/24	4/16/24	3/31/25	\$451,768
TOTAL AMOUNT THIS PERIOD							\$451,768

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Connie Tung, Contract Administrator, Rail Contracts & Budget
Bonny O'Connor, Manager, Capital Projects and Environmental Planning
Subject: **Accept On-Call Management of Soil, Hazardous Waste, and Other
Environmental Compliance Services Update**

Finance Committee
Recommendation

Technology, Operations, Planning,
and Safety Committee
Recommendation

Advocacy and Major Projects
Committee Recommendation

Purpose and Recommended Action

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Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from May 1st, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2024-28, the Board of Directors (Board) awarded contracts to Millennium Consulting Associates, consisting of a five-year base term for an aggregate not-to-exceed amount of \$4,800,000 with up to two, one (1)-year option terms.

Prepared By:	Connie Tung	Contract Administrator, Rail Contracts & Budget	650-508-6371
	Bonny O'Connor	Manager, Capital Projects and Environmental Planning	650-508-7944

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	\$5,600,000
Exercised:	5.0	\$4,800,000
Work Directives Issued:		\$0
Remaining Exercised Capacity:		\$4,800,000

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	36	2%	0%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	5/1/2024	4/30/2029	5.0	\$4,800,000	2024-28
Option #1	5/1/2029	4/30/2030	1.0	\$400,000	2024-28
Option #2	5/1/2030	4/30/2031	1.0	\$400,000	2024-28
Amendment					
Total:			7.0	\$5,600,000	

Table 4

Vendor	Millennium Consulting Associates	TOTAL
Contract #	24-J-P-030	
Total WDs Issued	\$0	\$0
Previous Reporting Period	\$0	\$0
Current Reporting Period	\$0	\$0

Table 5

No WDs issued this reporting period.

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Connie Tung, Contract Administrator, Rail Contracts & Budget
Robert Tam, Manager, Tech Research & Dev. Technology
Subject: **Accept On-Call Program Management Oversight Services Update**

Finance Committee
Recommendation

Technology, Operations, Planning,
and Safety Committee
Recommendation

Advocacy and Major Projects
Committee Recommendation

Purpose and Recommended Action

This report is for information only. No Board action is required.

Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from March 1st, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2024-07, the Board of Directors (Board) awarded contracts to Ghirardelli Associates, Inc., Jacobs Project Management Company & Consor PMCM, Inc., consisting of a seven-year base term for an aggregate not-to-exceed amount of \$55,000,000 with no options.

Prepared By:	Connie Tung	Contract Administrator, Rail Contracts & Budget	650-508-6371
	Robert Tam	Manager, Tech Research & Dev. Technology	650-508-7969

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	\$55,000,000
Work Directives Issued:		\$11,054,237
Remaining Capacity:		\$43,945,763

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2555	97	4%	20%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	3/1/2024	2/28/2031	7.0	\$55,000,000	2024-07
Amendment					
Total:			7.0	\$55,000,000	

Table 4

Vendor	Ghirardelli Associates, Inc.	Jacobs Project Management Company	Conсор PMCM, Inc.	TOTAL
Contract #	24-J-P-002A	24-J-P-002B	24-J-P-002C	
Total WDs Issued	\$0	\$8,831,553	\$2,222,684	\$11,054,237
Previous Reporting Period	\$0	\$0	\$0	\$0
Current Reporting Period	\$0	\$8,831,553	\$2,222,684	\$11,054,237

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
11420	Project Controls Analyst	Consultant services to provide project controls expertise to support the administration of the capital projects.	Jacobs	6/5/24	4/1/24	2/28/25	\$195,329
11422	Sr. Scheduler	Consultant services to provide scheduling expertise to support the administration of the capital project schedules.	Conzor	6/5/24	4/1/24	2/28/25	\$402,766
11423	Sr. PM for South Linden Ave and Scott St. Grade Separation Project	Sr. project management services for the preconstruction phase of the South Linden Avenue and Scott Street Grade Separation Project and other Rail Development projects as required and bring the projects to construction phase as option to second phase.	Jacobs	6/5/24	5/20/24	5/20/25	\$592,330
11424	Sr. PM for Pre-Construction Phase of the Mountain View Transit Center	Sr. project management services for the reconstruction phase of the Mountain View Transit Center Project and Rengstorff Ave Grade separation Project, other Rail Development projects as required.	Jacobs	6/5/24	5/20/24	5/20/25	\$609,732
11438	Sr. PM for Various Capital Systems Projects	Sr. project management services for developing, managing, and administering Capital Systems Projects and other Rail Development projects as required.	Conzor	6/5/24	4/1/24	4/1/25	\$585,004
11439	Sr. PM for Communications and Signal Projects	Sr. project management services for managing and administering several on-going system projects. These projects included State of Good Repair projects and system replacement projects.	Jacobs	6/5/24	4/1/24	6/30/25	\$602,921
11440	Contract Administrator Services	Contract administration services for Caltrain operational systems.	Conzor	6/5/24	4/1/24	4/1/25	\$409,932
11441	Mini-high Platform and Verizon Sink Hole Repair Project Management	Project management services for the implementation of Verizon Sink Hole Repair and managing construction phase of the Mini-high Platform Project.	Jacobs	6/5/24	4/1/24	8/31/25	\$291,513
11442	Sr. Project Manager for the Guadalupe Bridge Replacement Project	Sr. project management services for managing the construction phase of the Guadalupe Bridge Replacement Project, San Francisquito Bridge Embankment and other Rail Development projects as required.	Jacobs	6/5/24	4/1/24	4/1/25	\$654,980
11443	Record Management Support Services	Sr. document control specialist to provide document control expertise to support the on-going management and retention of Agency engineering, capital project design and construction records.	Jacobs	6/5/24	4/1/24	6/30/26	\$674,605
11444	Estimating Services	Consultant services to provide preparation of project cost estimate at various stages of the project and various classes of estimate.	Jacobs	6/5/24	4/1/24	3/31/29	\$2,117,548
11445	Project Manager Support	Project management consultant support for the 4 th and King Yard Preparation work, which is part of the enabling work for the San Francisco Downtown Rail Extension.	Jacobs	6/5/24	4/1/24	9/30/24	\$539,371

11446	Caltrain Design & Construction Manual Updating	Consultant services to provide support to the Design & Construction - Program Management group to ensure that all current practices and standards are represented in the manuals and that all are trained on the manuals.	Jacobs	6/5/24	4/1/24	12/31/24	\$321,614
11458	Caltrain Policy, Strategy, and Communications Support	Consultant support to Caltrain in the areas of policy and strategy on governance and project management work related to the Diridon Station Program.	Conzor	6/5/24	5/1/24	6/30/25	\$453,572
11460	Project Controls Services	Consultant services to provide project controls expertise to support the administration of the capital projects.	Conzor	6/5/24	5/28/24	5/27/25	\$371,410
11461	Onsite Estimator	Consultant services to support project controls group (Manager of Project Estimates) in development of cost estimates and support for construction management team in contract change orders.	Jacobs	6/5/24	6/3/24	4/30/29	\$2,069,970
24114 47000	CalMod PCEP Document Control Sr. Analyst	Document Controls Sr. Analyst – Ann Morris to provide consultant services for CalMod / Peninsula Corridor Electrification Project (PCEP).	Jacobs	6/5/24	4/1/24	4/30/24	\$22,203
24114 52000	CalMod/PCEP Scheduler	Consultant Scheduler to support Peninsula Corridor Electrification Project (PCEP) for the remaining project work through completion.	Jacobs	6/5/24	4/18/24	12/31/24	\$139,437
TOTAL AMOUNT THIS PERIOD							\$11,054,237

**Peninsula Corridor Joint Powers Board
Staff Report**

To: JPB Finance Committee
Through: Michelle Bouchard, Executive Director
From: Lawrence Leung, Manager, Rail Contracts & Budget
Melissa Reggiardo, Manager, Caltrain Planning
Subject: **Accept On-Call Transportation Planning and Consultant Support Services Update**

Finance Committee
Recommendation

Technology, Operations, Planning,
and Safety Committee
Recommendation

Advocacy and Major Projects
Committee Recommendation

Purpose and Recommended Action

This report is for information only. No Board action is required.

Discussion

This informational item is presented quarterly to the Board and reports on the following:

- Total amount of work directives (WDs) issued to each firm since contract inception
- List of WDs and amendments issued since the last reporting period with the WD number, title, description, JPB project manager, vendor, issuance date, start date, end date, and value

The tables below provide an update of contract activities from March 7th, 2024 thru June 5th, 2024. Table 1 summarizes the contract capacity status. Table 2 updates the percentage of capacity used against the percent time elapsed. Table 3 shows the Board approved dates and amounts. Table 4 aggregates the WD amounts issued to each of the vendors. Table 5 describes each of the WDs and/or amendments issued since the last reporting period.

Budget Impact

There is no impact on the budget.

Background

Pursuant to Resolution No. 2020-18, the Board of Directors (Board) awarded contracts to Fehr & Peers, HNTB Corporation, Kimley-Horn & Associates, Inc., Arup North America Ltd., Mott MacDonald Group Inc., and WSP USA, Inc., consisting of a five-year base term for an aggregate not-to-exceed amount of \$25,000,000 with two additional, one-year option terms in an aggregate not-to-exceed amount of \$5,000,000 for each option year.

Pursuant to Resolution No. 2023-26, the Board authorized amendments to the contracts with the Consultants to increase the contract amount by \$10,000,000, from \$25,000,000 to \$35,000,000, to be shared in the aggregate amongst the six firms.

Pursuant to Resolution 2024-24, the Board authorized amendments to 1) exercise both options early (on July 1, 2024, rather than July 1, 2025, and July 1, 2026), to access the additional \$10 million in capacity remaining on the options before the current option period; 2) Extend the contract duration through December 31, 2025; and 3) increase the not-to-exceed contract capacity amount by \$7,500,000, from \$35,000,000 to \$42,500,000 (for a total of \$52,500,000 with the options), and to be shared as a pool for authorized tasks amongst the consultant firms.

Prepared By:	Lawrence Leung	Manager, Rail Contracts & Budget	650-508-6328
	Melissa Reggiardo	Manager, Caltrain Planning	650-868-9925

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.5	\$52,500,000
Exercised:	5.5	\$42,500,000
Work Directives Issued:		\$35,210,489
Remaining Exercised Capacity:		\$7,289,511

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	1435	79%	67%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	7/1/2020	6/30/2025	5.0	\$25,000,000	2020-18
Option #1	7/1/2024	12/31/2025		\$5,000,000	
Option #2	7/1/2024	12/31/2025		\$5,000,000	
Amendment #1				\$10,000,000	2023-26
Amendment #2	7/1/2025	12/31/2025	0.5	\$7,500,000	2024-24
Total:			5.5	\$52,500,000	

Table 4

Vendor	Fehr & Peers	HNTB	Kimley-Horn	ARUP	Mott	WSP	TOTAL
Contract #	20-J-P-006A	20-J-P-006B	20-J-P-006C	20-J-P-006D	20-J-P-006E	20-J-P-006F	
Total WDs Issued	\$4,765,399	\$7,070,859	\$11,708,857	\$2,138,365	\$7,925,088	\$1,563,719	\$35,172,288
Previous Reporting Period	\$4,721,643	\$6,959,574	\$11,392,579	\$2,138,365	\$7,950,924	\$1,570,461	\$34,733,546
Current Reporting Period	\$43,756	\$111,285	\$316,278	\$0	\$(25,836)	\$(6,742)	\$438,742

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
23085 32000	Communications and Outreach Program Support for PCEP FY23	Communication and outreach program support including a comprehensive marketing and communications program for PCEP in FY23. A1 added \$43k for additional support. Closed with a \$21k balance.	HNTB	6/4/2024	7/1/2022	6/30/2023	\$(21,391.49)
11115	Capital Planning Support	Support for potential capital planning initiatives, including potential capital projects that are currently being managed by the Planning Department and potential planning activities related to the lifecycle of rail capital projects including the implementation of processes to track and monitor stages of development of capital planning initiatives. Such projects require ongoing yet intermittent planning management and tracking, coordination with internal and external partners and stakeholders, development of agreements, technical reviews, etc. A1 added \$216k for additional support. A2 added \$123k for additional support. A3 added \$8k for additional support.	Kimley-Horn	5/31/2024	7/1/2023	6/30/2024	\$8,000.00
11510	Caltrain Planning Support	Seconded staff providing (up to 20 hours a week) support to the Rail Planning Division while the Deputy Director of Policy Development is out on leave.	Fehr & Peers	5/22/2024	6/3/2024	9/23/2024	\$50,717.20
10299	Business Plan - Business Modeling Support	Business modeling support including the evaluation of potential service and operating scenarios and the development of business modeling tools. A1 added \$27k for additional support and extended from 6/30/21 to 12/31/21. A2 added \$22k for additional support and extended from 12/31/21 to 6/30/22. A3 extended from 6/30/22 to 9/30/22. A4 extended from 9/30/22 to 12/31/22. Closed with a \$21k balance.	Fehr & Peers	5/21/2024	8/1/2020	12/31/2022	\$(20,573.93)
10300	¹ Business Plan - Project Management Support	Project management to support the continuation and completion of the Caltrain Business Plan technical work. A1 added \$155k for additional support. A2 added \$15k for additional support. A3 added \$135k for additional support. A4 extended to 12/31/21. A5 added \$30k for additional support and extended from 6/30/21 to 12/31/21. A6 extended from 12/31/21 to 9/30/22. Closed with a \$5k balance.	Fehr & Peers	5/21/2024	7/1/2020	10/28/2022	\$(5,465.28)
10301	Business Plan - Outreach Support	Stakeholder outreach to support the continuation and completion of the Caltrain Business Plan technical work. A1 added \$60k for additional support. A2 from 6/30/21 to 12/31/21. A3 extended from 12/31/21 to 3/31/22. A4 extended from 3/31/22 to 9/30/22. A5 extended from 9/30/22 to 12/31/22. Closed with a \$16k balance.	Fehr & Peers	5/21/2024	7/1/2020	12/31/2022	\$(15,723.95)
10305	DISC Plan – Technical Support & Analysis	Technical management and support and organizational, governance and funding analysis and strategy for the remainder of Phase I of the Diridon Station Concept Plan. A1 added \$59k for additional support. A2 added \$208k and extended from 6/30/21 to 10/31/21. A3 revised scope. A4 extended from 10/31/21 to 2/28/22. A5 extended from 2/28/22 to 6/30/22. A6 extended from 6/30/22 to 9/30/22. A7 extended from 9/30/22 to 2/28/23. Closed with a \$30 balance.	Kimley-Horn	5/21/2024	9/3/2020	2/28/2023	\$(30.27)
10431	Ridership Recovery Task Force Support	Support to provide highly experienced and creative project management and subject matter experts that will assist Caltrain and its Ridership Recovery Task Force in developing a strategic and actionable plan to increase ridership levels. Closed with a \$2k balance.	Fehr & Peers	5/21/2024	10/14/2022	12/31/2023	\$(2,065.47)
10670	Short Range Transit Plan (SRTP) Reimagined	Support to draft the Caltrain Short Range Transit Plan (SRTP) Reimagined. Such consultant help and support is sought by Fehr & Peers based on prior work on Caltrain’s Business Plan, recent COVID-19 Recovery & Scenario Planning efforts, and planning support for Caltrain’s March 2022 Special Finance meeting. It is anticipated that prior work by Fehr & Peers can be used as background and backup documentation for this effort. Closed with a \$5k balance.	Fehr & Peers	5/21/2024	8/5/2022	12/31/2022	\$(5,287.83)

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
10671	Schedule & Service Plan Alternatives Analysis	Support to: analyze our current 104 train per weekday/32 trains per weekend day schedule to determine the optimal crew and equipment (trainset) requirements, develop a new schedule to reduce the overall equipment requirements and/or to provide more maintenance time for the existing rolling stock, and look at alternative service plans to increase track time for construction activities. A1 extended from 10/1/22 to 12/30/22. A2 extended from 12/30/22 to 6/30/23. Closed with a \$28k balance.	Fehr & Peers	5/21/2024	8/15/2022	6/30/2023	\$(27,800.12)
10672	Caltrain Construction Timetable Production	Support to: produce a temporary construction timetable for weekday Caltrain service to accommodate single-tracking required for the Electrification Project, produce two options for a weekend train schedule that would accommodate a midline bus bridge, and develop supporting documents including string line charts and a power point presentation describing the service plan for JPB. A1 extended from 8/31/22 to 12/31/22. A2 added \$80k for additional support and extended from 12/31/22 to 5/31/23. A3 added \$12k for additional support and extended from 5/31/23 to 12/31/23. Closed with a \$7k balance.	Fehr & Peers	5/21/2024	8/31/2022	12/31/2023	\$(7,136.09)
10879	Ridership Reporting Methodology Update	Consultant services to provide analytical support of Caltrain's ridership reporting methodology and make detailed recommendations for how the railroad collects, analyzes, and reports ridership data. Closed with a \$5k balance.	Fehr & Peers	5/21/2024	4/11/2023	6/30/2023	\$(5,307.56)
10336	San Francisquito Creek Bridge Replacement - Planning and Outreach	Planning and outreach to accompany baseline engineering assessments and earliest concept designs for the San Francisquito Creek Bridge replacement. A1 extended from 6/30/21 to 6/30/22. A2 extended from 6/30/22 to 3/31/23 and added \$73k for additional support. A3 extended from 3/31/23 to 6/30/23. Closed with a \$9k balance.	HNTB	5/21/2024	12/16/2020	6/30/2023	\$(9,202.28)
10337	Clipper 2.0 Implementation Project Management	Project management and consulting services for the Clipper 2.0 program (project) administered by the MTC. The project is currently underway with final design review expected to be provided in July 2021. The consultant will provide project management and ongoing consultant services for both Caltrain and SamTrans (the District). The expectation is that 50% of the CONSULTANT'S time will be dedicated to each of the two agencies. A1 extended from 6/30/22 to 6/30/23. Closed with a \$112k balance.	HNTB	5/21/2024	8/16/2021	6/30/2023	\$(111,677)
10448	SF Railyards PBC - Strategic Advisory Services	Obtain Technical Analysis and Business Case Development services for the completion of the San Francisco Railyards Redevelopment Preliminary Business Case. Closed with a \$26 balance.	Mott	5/21/2024	8/20/2021	6/30/2023	\$(26.24)
10701	Strategic Advising Services	Support to provide strategic advising services for Caltrain. Closed with a \$16k balance.	HNTB	5/21/2024	8/16/2023	12/31/2023	\$(16,068.98)
10881	Targeted Business Plan Update	Consultant Services for targeted update to the Caltrain Business Plan.	Fehr & Peers	5/21/2024	5/21/2024	12/31/2024	\$37,571.56
10907	Broadband Grants	Support to assist Caltrain with finding grant opportunities and applying for the grants pertaining to the broadband wireless communications system for the new electric trains. Closed with a \$7k balance.	WSP	5/21/2024	11/28/2022	12/31/2023	\$(6,741.49)
10450	Major Stations Planning Support	Support for major station projects managed within the Planning Department, primarily the San Francisco Railyards, Downtown Extension (DTX) and Diridon station. A1 extended from 3/31/23 to 5/5/23. A2 added \$70k for additional support and extended from 5/5/23 to 6/30/23. A3 added \$216k for additional support and extended from 6/30/23 to 12/31/23. Closed with a \$26k balance.	Mott	5/20/2024	9/1/2022	12/31/2023	\$(25,809.19)

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
10472	Diridon Business Case Strategic Advisory Services	Support for project management and strategic advisory services to facilitate the planning process for the Diridon Station Business Case. More specifically, Caltrain is looking for support in managing the Business Case technical work as well as associated strategic communications and outreach with Business Case Partner Agencies (including the City of San Jose, Santa Clara Valley Transportation Authority, California High Speed Rail Authority and Metropolitan Transportation Commission) and electeds. A1 extended from 6/30/23 to 8/31/23. A2 extended from 8/31/23 to 10/31/23. A3 added \$298k for additional support and extended from 10/31/23 to 12/31/23. A4 added \$54k for additional support and extended from 12/31/23 to 4/30/24. A5 added \$132k for additional support.	Kimley-Horn	5/15/2024	3/1/2023	4/30/2024	\$185,874.00
11114	Capital Planning Support	Support for capital planning initiatives being managed or supported by the Planning Department, including but not limited to the San Francisquito Creek Bridge Conceptual Design & Community Engagement and Connecting Palo Alto projects located in Palo Alto. A1 reduced \$33k for closure of tasks and extended to 12/31/24.	HNTB	5/3/2024	7/1/2023	6/30/2025	\$(33,398.05)
10703	TASI Readiness to Perform EMU Maintenance	Support to assess TASI's readiness to perform EMU maintenance.	HNTB	4/24/2024	4/16/2024	4/1/2025	\$284,104.65
10471	SF DTX, Railyards Dev, & Diridon Ops Analyses	Obtain Operations Analysis services for Caltrain in support of multiple long term planning projects: <ul style="list-style-type: none"> • Development of the San Francisco Railyards site. • The San Francisco Downtown Extension (DTX) project, including the proposed 4th and King Railyards Site Enabling Works. • San Jose Diridon Integrated Station Concept (DISC), including potential relocation of Caltrain's Centralized Equipment and Maintenance Operations Facility (CEMOF). Since each project is at a different stage of planning and/or design, it is critical that a long term operations and fleet storage plan for the entire railroad be developed that incorporates all projects in a single integrated plan. A1 extended from 2/29/24 to 12/31/24. A2 added \$122k for additional support.	Kimley-Horn	4/22/2024	3/13/2023	12/31/2024	\$122,435.00
10702	San Francisco DTX Agreement Development Services	The work directive includes continued support for the Downtown Rail Extension (DTX) project, specifically to support the development of the 4th and King Yard (4KY) Preparation Agreement, the Master Cooperative Agreement (MCA), and to review major DTX project deliverables. This work is defined in the Interim Agreement (dated September 1, 2023) between the Transbay Joint Powers Authority (TJPA) and Caltrain and is reimbursed by TJPA. As outlined in the Interim Agreement, the work includes the development of a 4KY Agreement to define the delivery of work needed at the 4th and King site to construct the DTX tunnel and its connection to the Caltrain mainline tracks. It also includes the development of the MCA. The key elements of the MCA include project definition, asset disposition, rail activation planning, operations and maintenance responsibilities and funding, and revenue allocation. The consultant team will also review TJPA-prepared deliverables, including those for the FTA, as needed. A1 added \$19k for additional support.	HNTB	4/22/2024	9/1/2023	9/30/2024	\$18,917.60

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
10469	SF Railyards PBC - PM & Ops	Obtain Project Management services for the completion of the San Francisco Railyards Redevelopment Preliminary Business Case, and; obtain services for the completion of rail service, storage, maintenance, and operations analysis associated with this potential redevelopment, including systemwide impacts and changes across the Caltrain corridor. A1 added \$39k for additional support. A2 added \$225k for additional support. A3 extended from 6/30/23 to 10/31/23. A4 added \$801k for additional support from A2 proposal. A5 added \$84k to fully fund A2 proposal and extended from 10/31/23 to 6/30/24. A6 extended from 6/30/24 to 12/31/24.	Kimley-Horn	3/28/2024	8/23/2021	12/31/2024	
10669	Caltrain Policy, Strategy and Communications Support	Support in the areas of policy and strategy on a number of key issues including the Caltrain governance. A1 extended from 12/31/22 to 12/31/23 and added \$366k for additional support. A2 extended from 12/31/23 to 2/29/24 and added \$60k for additional support. A3 extended from 2/29/24 to 3/15/24. A4 extended from 3/15/24 to 4/30/24 and added \$45k for additional support.	Fehr & Peers	3/28/2024	7/1/2022	4/30/2024	\$44,827.21
10880	PCEP Traffic Mitigation Implementation Strategy	Consultant services to identify an implementation strategy for the PCEP EIR's traffic and transportation mitigations. A1 extended from 3/31/24 to 6/30/25.	Fehr & Peers	3/15/2024	10/30/2023	6/30/2025	
TOTAL AMOUNT THIS PERIOD							\$438,742



DATE: JULY 11, 2024

TO: JPB FINANCE COMMITTEE

FROM: KATE JORDAN STEINER
CHIEF FINANCIAL OFFICER

SUBJECT: CONTRACTS AND PROCUREMENT QUARTERLY REPORTS

Contracts and Procurement submits the following report to the Board of Directors (Board) on a quarterly basis:

- Pursuant to Resolution 2023-41: Contracts and Amendments for Information Technology Licenses, Maintenance Services and Technology- related Products and Services through Cooperative Purchasing Programs greater than \$250,000.

The report for the last quarter (April 2024 to June 2024) is attached.

FY24 JPB POs for Cooperatives, Sole Source & Recurring IT Procurements >\$250K

JPB

The purchases listed below are for Information Technology Licenses, License Renewals, Maintenance Service, and Professional Services

Board Approved Authority	
Resolution #2023-41	\$3,000,000
	\$3,000,000

July 1 - September 30, 2023

1st Quarter

PO Date	PO# or Contract#	Vendor	PO Description	PO Amount	Remaining Authority
				\$ -	
				\$ -	\$ 3,000,000.00

October 1 - December 31, 2023

2nd Quarter

PO Date	PO# or Contract#	Vendor	PO Description	PO Amount	Remaining Authority
				\$ -	\$ 3,000,000.00

January 1 - March 31, 2024

3rd Quarter

PO Date	PO# or Contract#	Vendor	PO Description	PO Amount	Remaining Authority
Not Applicable	Non-PO Payment for Utilities	AT&T Wireless	Broadband 10G Internet & Public IP Address for five-years at \$111,818 per year.	\$ 599,090.00	
				\$ 599,090.00	\$ 2,400,910.00

April 1 - June 30, 2024

4th Quarter

PO Date	PO# or Contract#	Vendor	PO Description	PO Amount	Remaining Authority
TBD	04-SAMTR-L-021	Giro	Amenment 11 to Contract 04-SAMTR-L-021: Add 100 peak vehicles, Module Geo, Crew with CrewOpt for JPB	\$ 468,950.00	
			TOTAL PO AMT TO DATE	\$ 1,068,040.00	\$ 1,931,960.00

PENINSULA CORRIDOR JOINT POWERS BOARD



Title VI Fare Equity Analysis
\$1 Youth Fares
September 2024

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ATTACHMENTS

ATTACHMENT 1 – CALTRAIN SYSTEM MAP

ATTACHMENT 2 – SERVICE AREA DEMOGRAPHICS: LOW-INCOME AND MINORITY

ATTACHMENT 3 – BOARD APPROVAL OF DISPARATE IMPACT AND DISPROPORTIONATE BURDEN POLICIES

ATTACHMENT 4 – EXISTING FARE CHART

ATTACHMENT 5 – NOTICES OF PUBLIC HEARING

ATTACHMENT 6 – PRINT ADVERTISEMENTS OF NOTICES OF PUBLIC HEARING

ATTACHMENT 7 – PUBLIC HEARING NOTICE TAKE ONES

ATTACHMENT 8 – SOCIAL MEDIA POSTS

ATTACHMENT 9 – PRESS RELEASES

ATTACHMENT 10 – PUBLIC HEARING PRESENTATION

ATTACHMENT 11 – PUBLIC COMMENTS

ATTACHMENT 12 – BOARD APPROVAL OF ADOPTION OF YOUTH FARE STRUCTURE AND TITLE VI EQUITY ANALYSIS

Caltrain Title VI Fare Equity Analysis

2024 Proposed Fare Changes - \$1 Youth Fares

EXECUTIVE SUMMARY

Title VI of the Civil Rights Act of 1964 ensures that “no person in the United States shall, on the basis of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.” The Peninsula Corridor Joint Powers Board (“JPB” or “Caltrain”) has committed to the Federal Transit Administration (“FTA”) Title VI objectives set for in Circular 4702.1B ensuring that FTA-assisted benefits and related services are made available and are equitably distributed without regard to race, color, or national origin.

Caltrain operates commuter rail services for San Francisco, San Mateo, and Santa Clara counties. As a federal grant recipient, Caltrain is required to maintain and provide to the FTA information on Caltrain’s compliance with Title VI regulations. At a minimum, Caltrain conducts compliance assessments in the form of a Title VI Program update every three years, or a Title VI equity analysis when it undertakes a change in its fares or a major change in service.

This Title VI Fare Equity Analysis, prepared in conformity with Chapter IV of the FTA’s Circular 4702.1B, evaluates Caltrain’s proposed changes to Youth fares in the Pre-Clipper Next Generation Fare Structure, to be permanently implemented on September 1, 2024, and a Post-Clipper Next Generation Fare Structure to be effective upon Clipper Next Generation Execution. The initial Pre-Clipper Generation Fare Structure would implement \$1 All Zone One-way Youth Fare available on all fare platforms and introduce a new \$2 All Zone Youth Day Pass available on Ticket Vending Machines (“TVMs”) and the Caltrain mobile app. The later Post-Clipper Next Generation Fare Structure would implement a \$24 All Zone Monthly Pass available on Youth Clipper Card.

The following analysis provides a detailed review of the proposed fare adjustments and an assessment of any potential impacts on minority and low-income users. It also summarizes all public outreach conducted, including materials provided for Limited-English Proficient (LEP) populations and public comments received.

Applying Caltrain’s Title VI policies, this analysis demonstrates that the proposed fare changes to Youth fares in the Pre-Clipper Next Generation Fare Structure and Post-Clipper Next Generation Fare Structure **will not have a disparate impact on minority riders, nor impose a disproportionate burden on, or fail to proportionately benefit, low-income riders.**

BACKGROUND

CALTRAIN OVERVIEW

Caltrain provides commuter rail service between Santa Clara, San Mateo, and San Francisco counties. The service spans 77.4 miles from San Francisco to Gilroy and includes 31 stations – 29 are used for weekly service, 24 are used for weekend service (including one weekend-only station), and one is a special event service station which serves Stanford Stadium. The service area across the three counties is geographically and ethnically diverse, containing both dense urban cores and suburban landscape with residents from an array of different backgrounds. These factors make the Caltrain service area unique.

Beginning in September 2023 and until the new train electrification schedule goes into effect in September 2024, Caltrain operates 104 weekday trains and 32 weekend trains. In Fiscal Year 2024, Caltrain carried approximately 6.2 million passengers. **Attachment 1** displays the Caltrain Service Map. **Attachment 2** presents a map of service area demographics where the minority and low-income populations are broken out by tract group using the U.S. Census Bureau’s 2020 American Community Survey (“ACS”) Data. Minority Census tracts are defined as those in which the minority population exceeds the systemwide minority average of 65%. Low-income tract groups are defined under Caltrain’s Title VI Program as those in which more than 13% of households have incomes under \$25,000.

CALTRAIN TITLE VI POLICIES

In October 2012, the Federal Transit Administration (“FTA”) updated its guidance on Title VI of the Civil Rights Act of 1964 through FTA Circular 4702.1B. In accordance with the Circular, to guard against disparate impacts in decision-making and to establish thresholds for use in equity analyses of service and fare changes, FTA requires each federally assisted public transportation provider’s governing board to adopt three policies:

- Major Service Change Policy
- Disparate Impact Policy
- Disproportionate Burden Policy

Caltrain adopted its policies based on several factors, including existing policies in use, consultation with other transit agencies, and analysis of impacts of past service and fare change decisions. Caltrain made its policies available for public review in February 2013 and conducted significant public outreach to solicit input. Following public engagement, Caltrain revised the policy proposals, and the Board of Directors adopted the revised policies at the April 4, 2013, board meeting. The adopted policies follow, and a copy is available in **Attachment 3**.

MAJOR SERVICE CHANGE POLICY

All major increases or decreases in transit service are subject to a Title VI Equity Analysis prior to Board approval of the service change. A Title VI Equity Analysis completed for a major service change must be presented to the JPB Board of Directors for its consideration and included in the triennial Caltrain Title VI Program with a record of action taken by the Board.

Caltrain’s policy defines a major service change as any service change meeting one or both of the following criteria:

- A reduction or increase of 25 percent or more in total revenue train miles per day for the service day of the week (weekday, Saturday, or Sunday) for which the change is made.
- A greater than 50 percent reduction or increase in the number of stops at a station per day for the service day of the week (weekday, Saturday, or Sunday) for which the change is made. (Note: Any temporary or interim change due to construction or maintenance project is exempt from the definition and is not considered a “major service change.” The FTA applies a 12-month limit to the “temporary” service change exemption in Major Service Change policies.)

DISPARATE IMPACT POLICY

The Disparate Impact Policy establishes a threshold for determining whether a given action has a disparate impact on minority populations versus non-minority populations. Per FTA Circular 4702.1B:

Disparate impact refers to a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the recipient's policy or practice lacks a substantial legitimate justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin...

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by minority populations. The disparate impact threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by minority populations compared to impacts borne by non-minority populations. The disparate impact threshold must be applied uniformly...and cannot be altered until the next Title VI Program submission.

In the course of performing a Title VI Equity Analysis, Caltrain must analyze how the proposed action (a major service change or fare change) would impact minority populations as compared to non-minority populations.

Caltrain established its Disparate Impact threshold at 10 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by minority populations compared to the same impacts borne by non-minority populations.

In the event that the proposed action has a negative impact that affects minorities more than non-minorities with a disparity that exceeds the adopted 10 percent threshold, or that benefits non-minorities more than minorities with a disparity that exceeds the adopted threshold, Caltrain must (a) consider modifying the proposal to eliminate the disparate impact, (b) analyze whether the modification eliminated the disparate impact, and (c) demonstrate (1) a substantial legitimate justification for the proposed change and (2) that the proposed change is the least discriminatory alternative.

DISPROPORTIONATE BURDEN POLICY

The Disproportionate Burden Policy establishes a threshold for determining whether a given action has a disproportionate burden on low-income populations versus non-low-income populations. Per FTA Circular 4702.1B:

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by low-income populations. The disproportionate burden threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by low-income populations as compared to impacts borne by non-low-income populations.... The disproportionate burden threshold must be applied uniformly...and cannot be altered until the next [Title VI] program submission.

At the conclusion of the analysis, if the transit provider finds that low-income populations will bear a disproportionate burden of the proposed [fare/]service change, the transit provider should take steps to avoid, minimize or mitigate impacts where practicable. The provider should describe alternatives available to low-income populations affected by the [fare/]service changes.

In the course of performing a Title VI Equity Analysis, Caltrain must analyze how the proposed action (a major service change or fare change) would impact low-income as compared to non-low-income populations.

Caltrain established its Disproportionate Burden threshold at 10 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by low-income populations compared to the same impacts borne by non-low-income populations.

In the event the proposed action has a negative impact that affects low-income populations more than non-low income populations with a disparity that exceeds the adopted threshold, or that benefits non-low-income passengers more than low income passengers with a disparity that exceeds the adopted threshold, the JPB must take steps to avoid, mitigate, or minimize negative impacts where practicable.

PUBLIC ENGAGEMENT OF POLICY DEVELOPMENT

FTA Circular C 4702.1B requires transit agencies to seek public input before Board adoption of Disparate Impact and Disproportionate Burden policies. Staff developed draft policies and requested public input through four community meetings throughout the Caltrain Service

area, spanning San Francisco, San Mateo, and Santa Clara Counties. Caltrain requested comments be made through mail, telephone, and a dedicated e-mail address (TitleVI@caltrain.com).

The Title VI Policy community meetings were held at the following times and locations:

Tuesday, Feb. 12, 2013 - 6:30 p.m. to 8:00 p.m.

Gilroy Senior Center Meeting Room
7371 Hanna St, Gilroy

Thursday, Feb. 21, 2013 - 10:45 a.m. to 11:30 a.m.

Second Floor Auditorium
Caltrain Administrative Offices
1250 San Carlos Ave, San Carlos

Tuesday, Feb. 26, 2013 - 5:00 p.m. to 6:30 p.m.

Bay Area Opera House
4705 Third St, San Francisco

Wednesday, Feb. 27, 2013 - 6:30 p.m. to 8:00 p.m.

Mountain View City Hall Plaza Conference Room
500 Castro St, Mountain View

Caltrain also reached out to the following community groups and leaders:

San Francisco County

- Asian Pacific American Community Center
- Bayview Hill Neighborhood Association
- Bayview Merchants Association
- Better Bayview
- Brite/4800 Third St Neighbors
- Dogpatch Neighborhood Association
- Hunters Point Shipyard CAC
- India Basin Neighborhood Association
- Potrero Boosters
- Potrero Hill/Dogpatch Merchants Association
- Visitacion Valley Planning Alliance

San Mateo County

- All City Managers
- All Mayors

Santa Clara County

- All City Managers
- All Mayors
- Postings to City Council member Newsletters:
 - Ken Yeager
 - Ash Kalra
- Public Advocates
- Transform
- Urban Habitat

Although there were several outreach methods used, including Caltrain website postings, take-one notices printed in English and Spanish, Visual Message Signs at all stations, community meetings, news releases, advertisements in several newspapers, and social media postings (in accordance with the Caltrain Title VI Outreach Plan), there was very limited feedback from meeting attendees or other community members. Staff revised the proposal for its standards and policies and submitted them for Board approval. They were approved April 4, 2013. (**Attachment 3**)

More information regarding Caltrain's Title VI policies and standards can be found here: <http://www.caltrain.com/riderinfo/TitleVI.html>.

FARE PROPOSAL

CURRENT FARES

Caltrain fares are based on the number of zones that are partially or wholly traveled through by the passenger. A matrix of Caltrain’s existing fare chart is shown in **Attachment 4**.

Caltrain has a proof-of-payment fare enforcement system. Passengers must have a valid ticket before boarding the train or be subject to a citation. Passengers are required to show a ticket or Clipper Card to the conductor or fare inspector upon request and may also be required to show proof of age or other proof of eligibility for a discounted fare product. Full fares apply to all customers 19 years of age or older except those who qualify for an Eligible Discount ticket, which is approximately 50 percent of the full-fare price. A description of all the current Fare Categories and Fare Types is listed below.

FARE CATEGORIES

Full Fare	Full Fares apply to all customers, except those who qualify for an Eligible Discount or Clipper START, the regional means-based fare program
Eligible Discount	Discounted fare products priced at 50% or less of full fares are available to: Seniors: customers 65 years of age or older. Youth: customers 18 years old or younger. When one or more children four years old or younger are accompanied by one paying adult, only one child will be transported free of charge. All other children must travel on Youth tickets. Disabled: customers holding any of the following valid identification: Regional Transit Connection (RTC) Discount Card; registration for a permanent Disabled Person Placard Identification Card or California license plate issued by the Department of Motor Vehicles. Medicare Cardholder: customers who have a Medicare card.
Clipper START	The Clipper START program is the regional means-based fare program administered by the Metropolitan Transportation Commission (MTC). Clipper START offers at least a 50% discount compared to Clipper full fares for adult low-income riders (i.e., those with an annual household income at or below 200 percent of the Federal Poverty Level).
Clipper Bay Pass: Regional All Agency Pass	Available to passengers who are selected to participate in the Clipper Bay Pass Pilot Program, part of the Regional Fare Coordination and Integration Study administered by the Bay Area Integration Task Force. Clipper Bay Pass is managed by MTC and Bay Area Rapid Transit (BART) in close coordination with regional transit operators and Caltrain.
Group Travel	Groups traveling together with 25 or more passengers (e.g., for school field

Discount	trips) can purchase tickets at a 10 % discount over regular cash fares
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FARE TYPES

One-Way Ticket	Valid for use within four hours of the date and time sold, One-Way Tickets are honored for one-way passage away from the point of origin, including stopovers/transfers, within the zone(s) indicated.
Day Pass	Valid for use on a single day, through the last train on the service day on which the pass is sold. It is honored for unlimited travel within the zone(s) indicated.
Monthly Pass	Available only on the Clipper Card, the Monthly Pass is valid for use for the calendar month for which the pass is issued. Monthly Passes are honored for unlimited weekday trips between the zone(s) indicated on the pass. On Saturdays, Sundays, and holidays, the pass is honored for unlimited trips between all zones.
Zone Upgrade Ticket	<p>Valid for use within four hours of the date and time sold. Zone Upgrade Tickets are valid only when accompanying another valid ticket (One-way, Day Pass, or Monthly Pass) and cannot be used alone. The Zone Upgrade Ticket will be honored for one-way passage for additional zones purchased beyond the original ticket’s zone limits. The Zone Upgrade ticket’s validity period does not supersede the original ticket’s validity period.</p> <p>Caltrain service operates across six zones. The current increase in fare between zones is \$2.25 for Adult fares, and \$1.00 for Eligible Discount fares.</p>
Go Pass	<p>Valid for use within the calendar year for which it is issued, the Go Pass is an annual transit pass sold to employers, schools, and residential complexes that offers unlimited rides on Caltrain through all zones, seven days a week for one low, annual cost. Go Passes must be purchased by the sponsor for all employees, students, or residents, whether the individuals use Caltrain or not.</p> <p>The Go Pass fare is based on the cost of a monthly pass for three zones, which is the average distance traveled by a Go Pass customer. Entities participating in the Go Pass program are required to purchase passes for all employees/students/residents at the specified location.</p>

Exhibits 1 and 2 show the current fare chart in the Adult and Eligible Discount categories based on the number of zones that a passenger travels through.

Exhibit 1. Caltrain Adult Fare Chart

Adult Fares	How to Buy	Travel Within					
		1 Zone	2 Zones	3 Zones	4 Zones	5 Zones	6 Zones
One Way	TVM	\$3.75	\$6.00	\$8.25	\$10.50	\$12.75	\$15.00
	Clipper	\$3.20	\$5.45	\$7.70	\$9.95	\$12.20	\$14.45
Day Pass	TVM	\$7.50	\$12.00	\$16.50	\$21.00	\$25.50	\$30.00
Zone Upgrade	TVM	\$2.25 per zone					
Monthly Pass	Clipper	\$76.80	\$130.80	\$184.80	\$238.80	\$292.80	\$346.80

Exhibit 2. Caltrain Eligible Discount Fare Chart

Eligible Discount Fares	How to Buy	Travel Within					
		1 Zone	2 Zones	3 Zones	4 Zones	5 Zones	6 Zones
One Way	TVM	\$1.75	\$2.75	\$3.75	\$4.75	\$5.75	\$6.75
	Clipper	\$1.60	\$2.60	\$3.60	\$4.60	\$5.60	\$6.60
Day Pass	TVM	\$3.50	\$5.50	\$7.50	\$9.50	\$11.50	\$13.50
Zone Upgrade	TVM	\$1.00 per zone					
Monthly Pass	Clipper	\$38.40	\$62.40	\$86.40	\$110.40	\$134.40	\$158.40

PROMOTIONAL FARES – SEPTEMBER 2023

FTA Circular 4702.1B grants the Caltrain Executive Director the authority to implement special and promotional fare discounts lasting up to six months. While Caltrain’s ridership is increasing steadily, it continues to remain low amidst change in travel behavior from the pandemic. On September 1, 2023, Caltrain introduced four promotional products to provide enhanced value to customers and incentivize additional ridership.

These products included the 3-Day Pass, Family Day Pass, Group Day Pass, and \$1 All Zone One-Way Youth Fare. All products except the \$1 All Zone One-Way Youth Fare are available on the Caltrain Mobile App and Ticket Vending Machines (“TVM”). The \$1 Youth Fare is available only on Youth Clipper Cards.

The 3-Day Pass allows the pass holder to take unlimited trips for three consecutive days from the date the pass is purchased.

The Family Day Pass allows two adults and up to four youths (aged 18 and under) to ride together for the cost of two adults and one youth. All Family Day Pass riders must travel

together in the same train car.

The Group Day Pass allows passengers to pay for three Day Passes and receive the fourth Day Pass free of charge. All Group Day Pass travelers must travel together in the same train car and must be in the same fare class (Adult or Eligible Discount).

The \$1 Youth Fare offered the price for Youth (aged 18 and under) one-way rides to be \$1 for Clipper Youth Card holders. This promotional fare is eligible for travel through all 6 Caltrain zones.

FTA approved Caltrain's request for a six-month extension to further evaluate the four promotional products. The promotion will remain in effect until August 31, 2024.

PROPOSED FARE CHANGES – SEPTEMBER 2024

During the promotional phase, the \$1 All Zone One-Way Youth Fare resulted in a 43% year-over-year increase in Youth Clipper utilization compared to overall ticket sales growth of 18%. The 3-Day Pass, Family Day Pass, and Group Day Pass were modestly adopted at less than 1% of overall ticket sales and will not be permanently adopted.

To build on this success and promote further ridership increases, Caltrain staff proposes providing an expanded permanent discounted fare program for Youth riders. The discounted fare program will provide Youth riders the opportunity to purchase: \$1 One-Way Fares through Caltrain TVMs, Caltrain Mobile App, and Youth Clipper Cards; \$2 Youth Day Passes at TVMs and Caltrain Mobile App; and \$24 Monthly Passes on Youth Clipper Cards upon Clipper Next Generation execution.

This fare policy aligns with Caltrain's Fare Policy goals to ensure financial sustainability, increase equity by participating in programs that promote affordable transit, improve customer service that is easier to understand and purchase, and promote current and future ridership growth.

Staff recommends that the Board of Directors adopt two updated Fare Structures:

1. A Pre-Clipper Next Generation Fare Structure, effective September 1, 2024, upon Board approval in August 2024
2. A Post-Clipper Next Generation Fare Structure, effective upon Clipper Next Generation execution

In the first Pre-Clipper Next Generation Fare Structure, the changes for Youth riders include implementing a \$1 All Zone One-Way fare available on all platforms and introducing a new \$2 All Zone Day Pass available on TVMs and Caltrain Mobile App.

The second Post-Clipper Next Generation Fare Structure will implement a \$24 Youth All Zone Monthly Pass available on Youth Clipper Card.

The current promotional \$1 Youth Fare will remain in effect until August 31, 2024. After the promotional fare period, the expanded permanent discounted Youth fare program on the Pre-Clipper Next Generation Fare Structure will begin on September 1, 2024. The Post-Clipper Next Generation Fare Structure will be effective upon Clipper Next Generation execution.

When a permanent fare change is implemented, a fare equity analysis must be performed. The FTA considers fare reductions longer than six months permanent and a fare equity analysis must be conducted. The proposed permanent fare program affects the fare types of One-Way Ticket, Day Pass, Zone Upgrade, and Monthly Pass, across the Youth fare categories. Once approved, all fare changes will be reflected in the Caltrain Fare Structure, a legal document that establishes the specific fare categories and types for the train system. **Exhibit 3** below outlines the specific changes in the Youth categories during each phase of the new fare structure.

Exhibit 3. Caltrain Proposed Youth Discount Fare Chart, Effective September 1, 2024

Youth Discount Fares	How to Buy	Travel Within					
		1 Zone	2 Zones	3 Zones	4 Zones	5 Zones	6 Zones
One Way	TVM, Mobile App	\$1.75 \$1.00	\$2.75 \$1.00	\$3.75 \$1.00	\$4.75 \$1.00	\$5.75 \$1.00	\$6.75 \$1.00
	Youth Clipper Card	\$1.60 \$1.00	\$2.60 \$1.00	\$3.60 \$1.00	\$4.60 \$1.00	\$5.60 \$1.00	\$6.60 \$1.00
Day Pass	TVM, Mobile App	\$3.50 \$2.00	\$5.50 \$2.00	\$7.50 \$2.00	\$9.50 \$2.00	\$11.50 \$2.00	\$13.50 \$2.00
Zone Upgrade	TVM	\$1.00 per zone \$0.00 per zone					
Monthly Pass	Youth Clipper Card	\$38.40	\$62.40	\$86.40	\$110.40	\$134.40	\$158.40
	Youth Clipper Card*	\$38.40 \$24.00	\$62.40 \$24.00	\$86.40 \$24.00	\$110.40 \$24.00	\$134.40 \$24.00	\$158.40 \$24.00

**After Clipper 2.0 (Next Generation Fare Structure), effective upon Clipper Next Generation execution*

EQUITY EVALUATION OF PROPOSED CHANGES

In accordance with 49 CFR Section 21.5 (b) (2), 49 CFR Section 21.5 (b) (7) and Appendix C to 49 CFR part 21, grantees must evaluate all non-exempt fare changes to determine whether those changes have a discriminatory impact on minority or low-income populations.

Applying Caltrain's Title VI policies, this analysis confirms the expanded permanent discounted fare program permitting Youth to purchase \$1 One-Way Fares and \$2 Day Passes, effective September 1, 2024, and \$24 Monthly Passes upon Clipper Next Generation execution, **will not have a disparate impact on minority riders nor impose a disproportionate burden on low-income riders.**

FARE EQUITY METHODOLOGY OVERVIEW

Based on FTA Circular 4702.1B, for proposed changes that decrease fares by payment type or fare media, Caltrain should analyze any available information generated from ridership surveys that indicates whether minority and low-income Youth passengers are more or less likely to use the payment types subject to the proposed change and the associated fare changes resulting from the change.

Applying Caltrain's Title VI policies, if the percentage change difference in benefits experienced between non-minority riders and minority riders is greater than 10%, the fare change would result in Disparate Impacts on minority populations. Similarly, if the percentage difference in benefits experienced between non-low-income riders and low-income riders is greater than 10%, the fare change would result in a Disproportionate Burden to low-income populations.

The methodology developed to analyze the impact of the fare proposals on minority compared to non-minority populations and low-income compared to non-low-income populations included the following steps:

1. Determining data sources.
2. Defining the term low-income as those with an annual household income at or below 200 percent of the U.S. Department of Health and Human Services (HHS) poverty guidelines for 2024. Using the HHS poverty guidelines of \$15,060 for a household of one in 2024, those with an annual household income less than \$30,120 a year were defined as low-income.
3. Defining the term "Minority" to mean those who self-identified as any ethnicity

other than “White / Caucasian” alone in the 2022 Caltrain Triennial Customer Survey.

4. Using 2022 Caltrain Triennial Customer Survey data, current and proposed fare changes, and Fiscal Year 2024 systemwide ridership to determine if the proposed fare changes will have a disparate impact or disproportionate burden on minority or low-income populations, respectively, based on the agency’s associated policies.

POTENTIAL ADVERSE EFFECTS

There are no potential adverse effects to minority or low-income riders associated with the proposed permanent expanded discount program for Youth fares. These changes will result in a benefit to all Youth riders, including both minority and non-minority, and low-income users and non-low-income users.

While the implementation of this expanded discount program may reduce fare revenue by up to \$700,000, it is likely that the price reductions could incentivize incremental ridership by both Youth and families and the frequency of ridership, which may potentially increase fare revenue in the long term.

DATA USE AND ANALYSIS

For purposes of examining the fare payment behavior, the following data was used:

- 2022 Caltrain Triennial Customer Survey, which contains data on customers' riding behavior including fare usage, zones traveled, ethnicity, income, and other relevant information.
- Fiscal Year 2024 Caltrain ridership.
- Current and proposed fare structure based on most updated fare categories and fare prices (as of January 2024).

The fieldwork for the 2022 Caltrain Triennial Customer Survey was conducted from October to December 2022. A total of 2,838 surveys were completed by Caltrain riders. Given the size and scope of the 2022 Caltrain systemwide onboard customer survey (2,838 total respondents with a margin of error of +/- 1.73% at a confidence level of 95%), the data generally can be used to develop cross-tabulations to conduct in-depth analysis regarding the potential impact of the proposal on minority and low-income populations.

Data Assumptions:

- Although the Customer Survey data is a robust set, some passengers preferred not to reveal either their ethnicity, income, zones traveled, fare type, or fare category. Based on the unavailable data, the usable data set includes only those who responded to all questions. For travel zones 5 and 6, there were no Youth responses; as a result, these two travel zones were not included in this analysis. While it would have been ideal to have Youth riders' responses in all zones, the data that is unavailable for travel zones 5 and 6 is not a significant detriment to a comprehensive evaluation.
- This analysis compared income and ethnicity status across all Youth fare types for the Youth fare category for the number of zones traveled. Usable data for this question includes the fare product, fare category (Youth), the station boarded and alighted to determine number of zones traveled, ethnicity, annual household income, and people in household to determine income status.
- Given this data, percentages of minority riders were compared to non-minority riders, and low-income riders were compared to non-low-income riders, by fare type and systemwide. Out of the 2,838 total survey respondents, including 192 Youth respondents, for the 2022 Caltrain Triennial Customer Survey, 90 Youth responded to all questions required for this Title VI Fare Equity Analysis. (3% of total respondents, 47% of Youth respondents)

ANALYSIS METHODOLOGY

This equity analysis uses an Average Fare Analysis to assess the impacts of the fare discounts on minority and low-income communities. The proposed changes would affect all Youth fare types of One-Way ticket, Day Pass, and Monthly Pass for the Youth fare category. This analysis assesses: 1) how the proposed fare discounts would be distributed amongst minority, non-minority, low-income and non-low-income users; and 2) whether the proposed fare discounts would lead to a finding of Disparate Impact or Disproportionate Burden if the benefits to non-minority and non-low-income populations exceed Caltrain's 10% threshold compared to minority and low-income populations.

The Average Fare Analysis is the comparative tool to determine the impact to minority and low-income riders, by analyzing specific ridership and fare changes along with the impacts associated with changes in each fare type and fare category. The model compares "unit fares" among all the fare types. This analysis uses the Average Fare Analysis to evaluate all fare products affected by the proposed discounts in the Youth fare category.

The analysis provides a disaggregation of ethnicity and income among Youth riders using each fare product, payment option, and zones traveled. This includes a comparison of the current fare with the proposed discounted fare. The Average Fare Analysis also provides the percentage change between the existing and proposed fare structures by fare type for minority and income status of riders to assess whether the benefits of the proposed fare discounts will fall within the thresholds established by Caltrain for a Disparate Impact or Disproportionate Burden.

To determine the comparative percentage change for each fare type and rider group (i.e., Minority Youth, Non-Minority Youth, Low-Income Youth, and Non-Low-Income Youth), the actual number of riders in each fare type and rider group must first be calculated using 2022 ridership and approximate ratios of survey respondents in each fare type and rider group.

This number is then multiplied by both the existing fare as well as the proposed fare to obtain a cumulative annual current fare and annual proposed fare for each fare type.

The average current annual fare and average proposed annual fares are calculated next for each rider group and the difference between the two is calculated to obtain an average fare change for each rider group.

Next, the average fare change for each rider group is divided by the average current annual fares to translate into a percent change in impact for each rider group.

These percent changes are finally compared between each passenger group (i.e. Minority vs. Non-Minority and Low-Income vs. Non-Low-Income) to determine whether the benefits of the fare discount falls within the established 10 percent threshold, or rather, whether a

Disparate Impact and/or Disproportionate Burden exists.

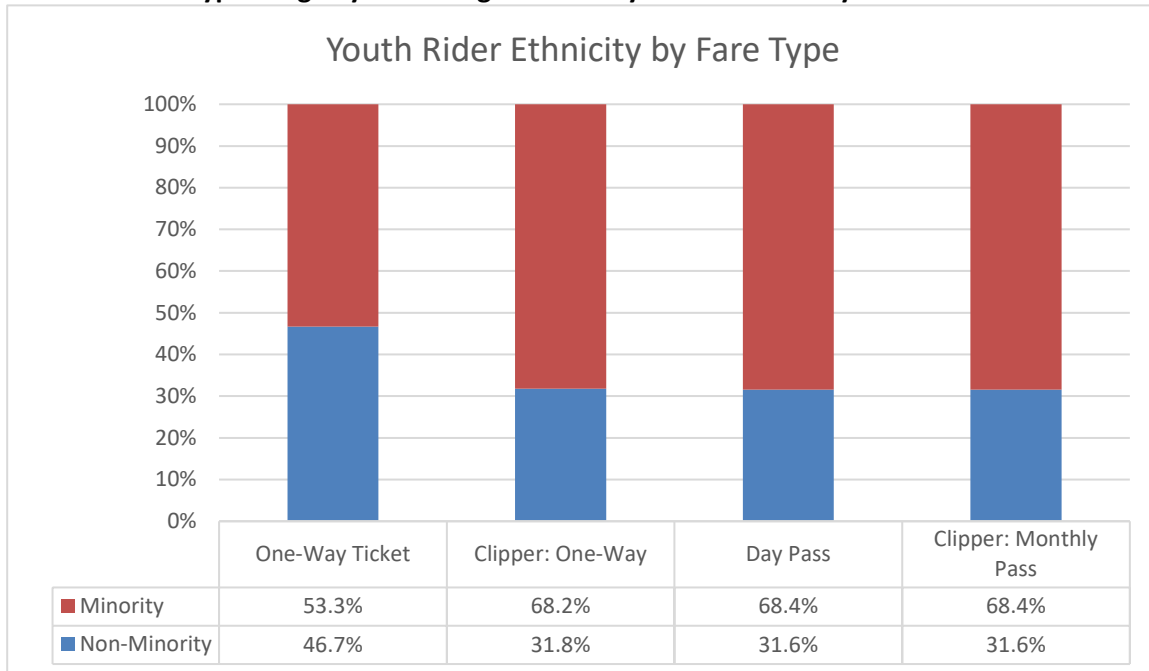
RIDERSHIP DEMOGRAPHICS OVERVIEW

Overall, Youth Caltrain riders in the survey self-identified as 63.3% minority and 36.7% non-minority. **Exhibits 4 and 5** below display a detailed breakdown of fare product usage by minority vs. non-minority riders.

Exhibit 4. Fare Type Usage Survey Data - Minority vs. Non-Minority Riders

Minority Status	One-Way Ticket	Clipper: One-Way	Day Pass	Clipper: Monthly Pass	Total
Minority	16	15	13	13	57
Non-Minority	14	7	6	6	33
Total	30	22	19	19	90

Exhibit 5. Fare Type Usage by Percentage – Minority vs. Non-Minority

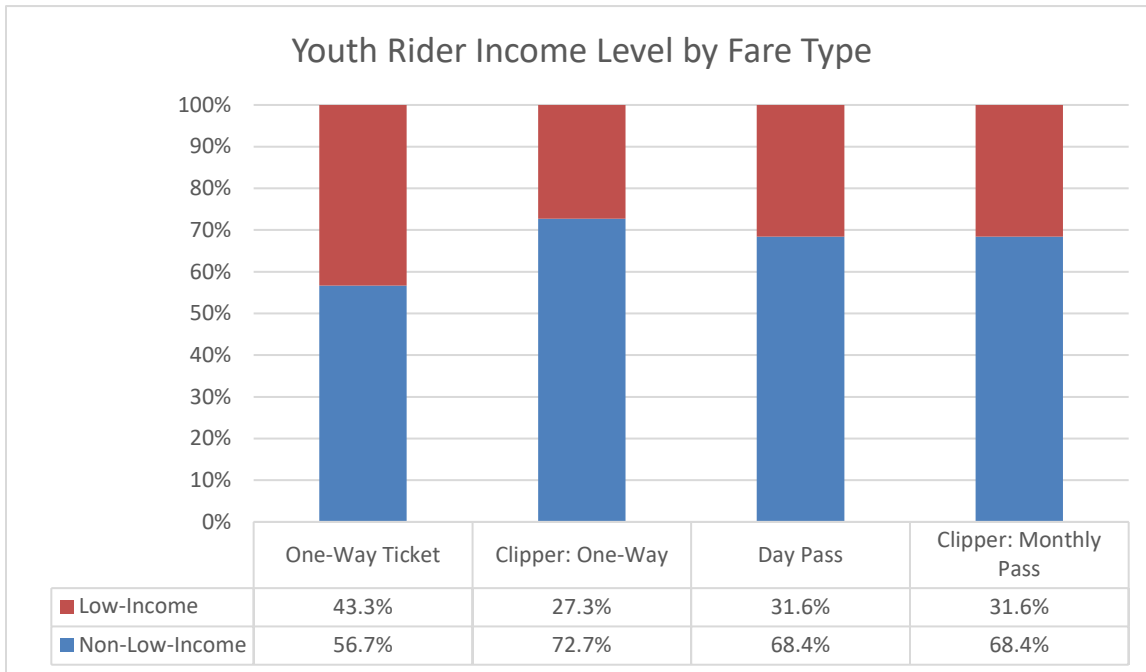


Of the 90 Youth survey respondents (47% of all Youth surveyed) who provided complete responses to the 2022 Caltrain Triennial Customer Survey, 34.4% were low-income, and 65.6% were non-low-income. See **Exhibits 6 and 7** below for details of fare product usage by low-income vs. non-low-income riders.

Exhibit 6. Fare Type Usage Survey Data - Low-Income vs. Non-Low-Income Riders

Income Status	One-Way Ticket	Clipper: One-Way	Day Pass	Clipper: Monthly Pass	Total
Low-Income	13	6	6	6	31
Non-Low-Income	17	16	13	13	59
Total	30	22	19	19	90

Exhibit 7. Fare Type Usage by Percentage – Low-income vs. Non-Low-income



ZONE DEMOGRAPHICS OVERVIEW

A review of the rider characteristics by zones traveled was further conducted to determine whether zone usage would influence disparate impacts or disproportionate burdens.

Exhibits 8 and 9 below present the breakdown of rider characteristics by zones traveled. Most Youth passengers travel within 2 to 3 zones.

With no data responses for Zones 5 and 6, this is likely a survey data gap resulting from a combination of proportionately fewer riders traveling among the two zones, incomplete responses from riders traveling in these zones, and the need to use complete survey responses for this equity analysis, rather than a true reflection of ridership and fare usage patterns.

Exhibit 8. Minority vs. Non-Minority Riders by Zones Traveled

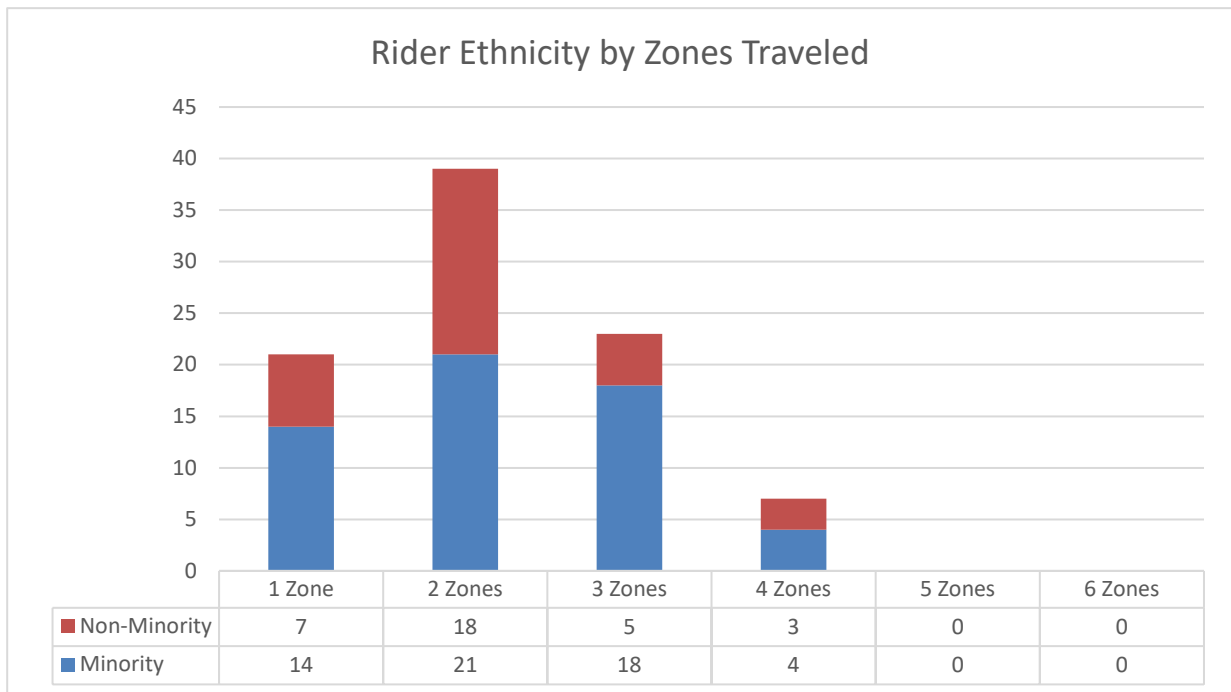
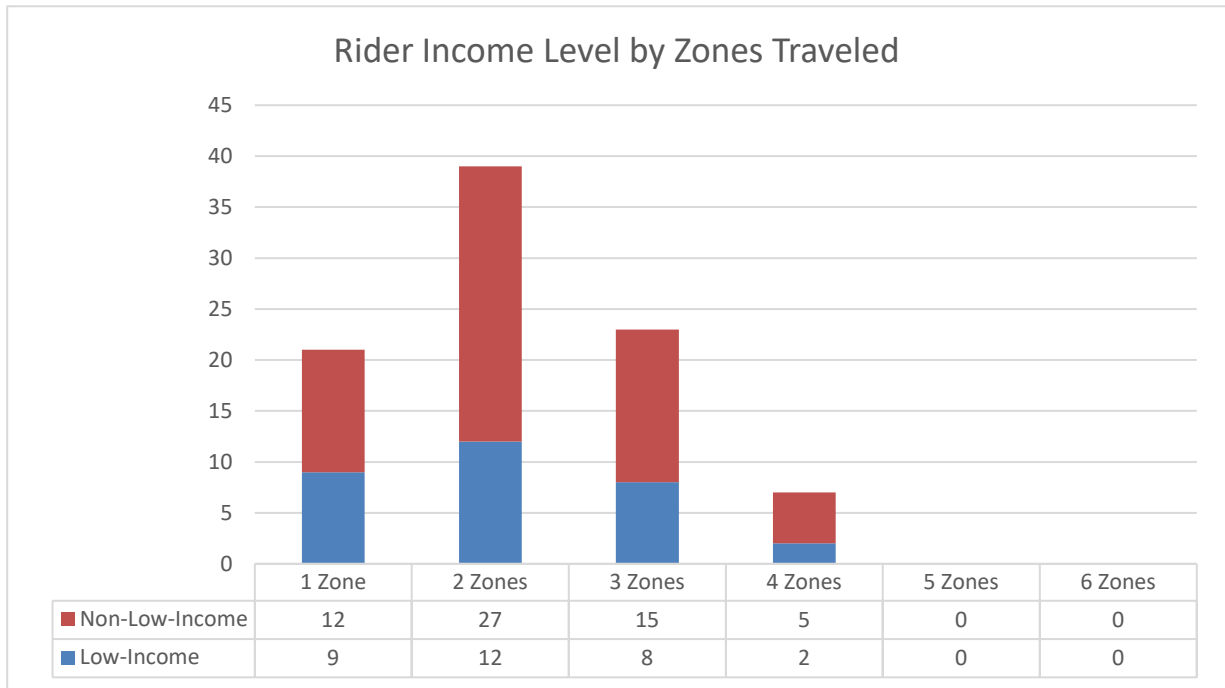


Exhibit 9. Low-Income vs. Non-Low-Income Riders by Zones Traveled



Based on the figures above, most Caltrain Youth passengers travel within 2 to 3 zones. The number of zones traveled does not influence disparate impact or disproportionate burden across systemwide ridership.

FARE EQUITY ANALYSIS FINDINGS

Based on the analysis, and using the Caltrain Title VI policies, the proposed Youth fare discounts starting September 1, 2024, in the revised Fare Structure **do not result in either a Disparate Impact on minority populations, or a Disproportionate Burden on low-income populations. Exhibits 10 to 14** below present a full analysis of the proposed fare discounts for all zones traveled and is broken down individually by number of zones traveled (1 to 4).

Exhibit 10. Average Fare Calculation of Proposed Youth Fare Discounts (All Zones)

				FY24 Current		FY24 (Eff. 9/1/2024)																																	
				Cost				FY24 Change				Survey Usage by Group (Approximate)				Usage by Group - 2023 Annual Ridership								Average Fare Change				Cumulative Annual Current Fare				Cumulative Annual Proposed Fare							
Zones Traveled	Fare Category	Fare Type	Payment Option	Existing	Unit Existing	FY24 Proposed	Unit Proposed	Absolute	Percent	Minority	Non-Minority	Low-Income	Non-Low-Income	Overall	Minority %	Minority Number	Non-Minority %	Non-Minority Number	Low-Income %	Low-Income Number	Non-Low-Income %	Non-Low-Income Number	Overall %	Total FY24 Ridership	Minority	Non-Minority	Low-Income	Non-Low-Income	Total	Minority	Non-Minority	Low-Income	Non-Low-Income	Minority	Non-Minority	Low-Income	Non-Low-Income		
1	Youth	One-Way	TVM, Mobile	1.75	1.75	1.00	1.00	-0.75	-43%	5	4	6	3	9	8.77%	25,350	12.12%	20,280	19.35%	30,420	5.08%	15,210	10.00%	45,630	-19,012.55	-15,210.04	-22,815.07	-11,407.53	-34,222.60	44,362.63	35,490.10	53,235.15	26,617.58	25,350.07	20,280.06	30,420.09	15,210.04		
			Clipper	1.60	1.60	1.00	1.00	-0.60	-38%	5	1	1	5	6	8.77%	25,350	3.03%	5,070	3.23%	5,070	8.47%	25,350	6.67%	30,420	-15,210.04	-3,042.01	-3,042.01	-15,210.04	-18,252.05	40,560.12	8,112.02	40,560.12	25,350.07	5,070.01	5,070.01	25,350.07			
		Monthly Pass	TVM, Mobile	3.50	1.75	2.00	1.00	-0.75	-43%	2	0	0	2	2	3.51%	10,140	0.00%	0	0.00%	0	3.39%	10,140	2.22%	10,140	-7,605.02	0.00	0.00	-7,605.02	-7,605.02	17,745.05	0.00	0.00	17,745.05	10,140.03	0.00	0.00	10,140.03		
			Clipper	38.40	1.28	24.00	0.80	-0.48	-38%	2	2	2	2	4	3.51%	10,140	6.06%	10,140	6.45%	10,140	3.39%	10,140	4.44%	20,280	-4,867.21	-4,867.21	-4,867.21	-4,867.21	-9,734.43	12,979.24	12,979.24	12,979.24	8,112.02	8,112.02	8,112.02				
2	Youth	One-Way	TVM, Mobile	2.75	2.75	1.00	1.00	-1.75	-64%	5	7	5	7	12	8.77%	25,350	21.21%	35,490	16.13%	25,350	11.86%	35,490	13.33%	60,840	-44,362.63	-62,107.68	-44,362.63	-62,107.68	-106,470.30	69,712.70	97,597.78	69,712.70	97,597.78	25,350.07	35,490.10	25,350.07	35,490.10		
			Clipper	2.60	2.60	1.00	1.00	-1.60	-62%	6	3	1	8	9	10.53%	30,420	9.09%	15,210	3.23%	5,070	13.56%	40,560	10.00%	45,630	-48,672.14	-24,336.07	-8,112.02	-64,896.19	-73,008.21	79,092.23	39,546.11	13,182.04	105,456.30	30,420.09	15,210.04	5,070.01	40,560.12		
		Monthly Pass	TVM, Mobile	5.50	2.75	2.00	1.00	-1.75	-64%	5	4	3	6	9	8.77%	25,350	12.12%	20,280	9.68%	15,210	10.17%	30,420	10.00%	45,630	-44,362.63	-35,490.10	-26,617.58	-53,235.15	-79,852.73	69,712.70	55,770.16	41,827.62	83,655.24	25,350.07	20,280.06	15,210.04	30,420.09		
			Clipper	62.40	2.08	24.00	0.80	-1.28	-62%	5	4	3	6	9	8.77%	25,350	12.12%	20,280	9.68%	15,210	10.17%	30,420	10.00%	45,630	-32,448.09	-25,958.47	-19,468.86	-38,937.71	-58,406.57	52,728.15	42,182.52	31,636.89	63,273.78	20,280.06	16,224.05	12,168.03	24,336.07		
3	Youth	One-Way	TVM, Mobile	3.75	3.75	1.00	1.00	-2.75	-73%	3	2	1	4	5	5.26%	15,210	6.06%	10,140	3.23%	5,070	6.78%	20,280	5.56%	25,350	-41,827.62	-27,885.08	-13,942.54	-55,770.16	-69,712.70	57,037.66	38,025.11	19,012.55	76,050.22	15,210.04	10,140.03	5,070.01	20,280.06		
			Clipper	3.60	3.60	1.00	1.00	-2.60	-72%	4	2	3	3	6	7.02%	20,280	6.06%	10,140	9.68%	15,210	5.08%	15,210	6.67%	30,420	-52,728.15	-26,364.08	-39,546.11	-39,546.11	-79,092.23	73,008.21	36,504.10	54,756.16	20,280.06	10,140.03	5,070.01	15,210.04			
		Monthly Pass	TVM, Mobile	7.50	3.75	2.00	1.00	-2.75	-73%	6	1	3	4	7	10.53%	30,420	3.03%	5,070	9.68%	15,210	6.78%	20,280	7.78%	35,490	-83,655.24	-13,942.54	-41,827.62	-55,770.16	-97,597.78	114,075.33	19,012.55	57,037.66	76,050.22	30,420.09	5,070.01	15,210.04	20,280.06		
			Clipper	86.40	2.88	24.00	0.80	-2.08	-72%	5	0	1	4	5	8.77%	25,350	0.00%	0	3.23%	5,070	6.78%	20,280	5.56%	25,350	-52,728.15	0.00	-10,545.63	-42,182.52	-52,728.15	73,008.21	0.00	14,601.64	58,406.57	20,280.06	0.00	4,056.01	16,224.05		
4	Youth	One-Way	TVM, Mobile	4.75	4.75	1.00	1.00	-3.75	-79%	3	1	1	3	4	5.26%	15,210	3.03%	5,070	3.23%	5,070	5.08%	15,210	4.44%	20,280	-57,037.66	-19,012.55	-19,012.55	-57,037.66	-76,050.22	72,247.71	24,082.57	24,082.57	15,210.04	5,070.01	5,070.01	15,210.04			
			Clipper	4.60	4.60	1.00	1.00	-3.60	-78%	0	1	1	0	1	0.00%	0	3.03%	5,070	3.23%	5,070	0.00%	0	1.11%	5,070	0.00	-18,252.05	-18,252.05	0.00	23,322.07	23,322.07	0.00	0.00	5,070.01	5,070.01	0.00	0.00			
		Monthly Pass	TVM, Mobile	9.50	4.75	2.00	1.00	-3.75	-79%	0	1	0	1	1	0.00%	0	3.03%	5,070	0.00%	0	1.69%	5,070	1.11%	5,070	0.00	16,912.55	16,912.55	0.00	-19,012.55	-19,012.55	0.00	24,082.57	24,082.57	0.00	24,082.57	0.00	5,070.01	0.00	5,070.01
			Clipper	110.40	3.68	24.00	0.80	-2.88	-78%	1	0	0	1	1	1.75%	5,070	0.00%	0	0.00%	0	1.69%	5,070	1.11%	5,070	-0.05	0.00	0.00	-14,601.64	-14,601.64	18,657.65	0.00	0.00	18,657.65	4,056.01	0.00	0.00	4,056.01		
5	Youth	One-Way	TVM, Mobile	5.75	5.75	1.00	1.00	-4.75	-83%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
			Clipper	5.60	5.60	1.00	1.00	-4.60	-82%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
		Monthly Pass	TVM, Mobile	11.50	5.75	2.00	1.00	-4.75	-83%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
			Clipper	134.40	4.48	24.00	0.80	-3.68	-82%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
6	Youth	One-Way	TVM, Mobile	6.75	6.75	1.00	1.00	-5.75	-85%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
			Clipper	6.60	6.60	1.00	1.00	-5.60	-85%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
		Monthly Pass	TVM, Mobile	13.50	6.75	2.00	1.00	-5.75	-85%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
			Clipper	158.40	5.28	24.00	0.80	-4.48	-85%						0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Total																																							

Exhibit 13. Average Fare Calculation of Proposed Youth Fare Discounts (3 Zones Traveled)

				FY24		FY24 (Eff. 9/1/2024)																																					
				Current		\$1 Youth Fares, \$2 Youth Day Pass																																					
				<i>(After Clipper 2.0)</i>				Cost		FY24 Change		Survey Usage by Group (Approximate)					Usage by Group - 2023 Annual Ridership							Average Fare Change					Cumulative Annual Current Fare				Cumulative Annual Proposed Fare										
Zones Traveled	Fare Category	Fare Type	Payment Option	Existing	Unit Existing	FY24 Proposed	Unit Proposed	Absolute	Percent	Minority	Non-Minority	Low-Income	Non-Low-Income	Overall	Minority %	Minority Number	Non-Minority %	Non-Minority Number	Low-Income %	Low-Income Number	Non-Low-Income %	Non-Low-Income Number	Overall %	Total FY24 Ridership	Minority	Non-Minority	Low-Income	Non-Low-Income	Total	Minority	Non-Minority	Low-Income	Non-Low-Income	Minority	Non-Minority	Low-Income	Non-Low-Income						
3	Youth	One-Way	TVM, Mobile	3.75	3.75	1.00	1.00	-2.75	-73%	3	2	1	4	5	16.67%	59,518	40.00%	39,678	12.50%	19,839	26.67%	79,357	21.74%	99,196	-163,673.29	-109,115.53	-54,557.76	-218,231.06	-272,788.82	223,190.85	148,793.90	74,396.95	297,587.81	59,517.56	39,678.37	19,839.19	79,356.75						
			Clipper	3.60	3.60	1.00	1.00	-2.60	-72%	4	2	3	3	6	22.22%	79,357	40.00%	39,678	37.50%	59,518	20.00%	59,518	26.09%	119,035	-206,327.55	-103,163.77	-154,745.66	-154,745.66	-309,491.32	285,684.29	142,842.15	214,263.22	214,263.22	79,356.75	39,678.37	59,517.56	59,517.56						
		Monthly Pass	TVM, Mobile	7.50	3.75	2.00	1.00	-2.75	-73%	6	1	3	4	7	33.33%	119,035	20.00%	19,839	37.50%	59,518	26.67%	79,357	30.43%	138,874	-327,346.59	-54,557.76	-163,673.29	-218,231.06	-381,904.35	446,381.71	74,396.95	223,190.85	297,587.81	119,035.12	19,839.19	59,517.56	79,356.75						
			Clipper	86.40	2.88	24.00	0.80	-2.08	-72%	5	0	1	4	5	27.78%	99,196	0.00%	0	12.50%	19,839	26.67%	79,357	21.74%	99,196	-206,327.55	0.00	-41,265.51	-165,062.04	-206,327.55	285,684.29	0.00	57,136.86	228,547.44	79,356.75	0.00	15,871.35	63,485.40						
Total										18	5	8	15	23	100.00%	357,105	100.00%	99,196	100.00%	158,713	100.00%	297,588	100.00%	456,301	-903,674.97	-266,837.07	-414,242.23	-756,269.81	-1,170,512.04	1,240,941.15	366,033.00	568,987.89	1,037,986.27	337,266.18	99,195.94	154,745.66	281,716.46						
										78.26%	21.74%	34.78%	65.22%																														
										357,105	99,196	158,713	297,588	456,301	< est total youth ridership (7.35%)																												
										< total FY24 ridership																																	

Disparate Impact and Disproportionate Burden Findings

For all average fare analyses, the differences for both categories based on ethnicity and income are well below the 10% threshold, at less than 2%. **Exhibits 15 through 19** show the cumulative Disparate Impact and Disproportionate Burden average fare analysis for all zones traveled, and for travel through 1 to 4 zones. **The proposed fare discounts will not disparately impact minority passengers nor disproportionately burden low-income populations.**

Exhibit 15. Cumulative DI/DB Average Fare Analysis – All Zones Traveled

Minority Existing Avg. Fare	Minority Proposed Avg. Fare	Non-Minority Existing Avg. Fare	Non-Minority Proposed Avg. Fare	Low-Income Existing Avg. Fare	Low-Income Proposed Avg. Fare	Non-Low-Income Existing Avg. Fare	Non-Low-Income Proposed Avg. Fare
\$2.75	\$0.95	\$2.73	\$0.96	\$2.69	\$0.96	\$2.77	\$0.96
Avg. % Change	-65.30%		-64.70%	Avg. % Change	-64.32%		-65.47%
		Difference	(0.61%)			Difference	1.15%
		Disparate Impact	No			Disproportionate Burden	No

Exhibit 16. Cumulative DI/DB Average Fare Analysis – 1 Zone Traveled

Minority Existing Avg. Fare	Minority Proposed Avg. Fare	Non-Minority Existing Avg. Fare	Non-Minority Proposed Avg. Fare	Low-Income Existing Avg. Fare	Low-Income Proposed Avg. Fare	Non-Low-Income Existing Avg. Fare	Non-Low-Income Proposed Avg. Fare
\$1.63	\$0.97	\$1.59	\$0.94	\$1.63	\$0.96	\$1.61	\$0.97
Avg. % Change	-40.38%		-40.86%	Avg. % Change	-41.34%		-39.93%
		Difference	0.48%			Difference	(1.41%)
		Disparate Impact	No			Disproportionate Burden	No

Exhibit 17. Cumulative DI/DB Average Fare Analysis – 2 Zones Traveled

Minority Existing Avg. Fare	Minority Proposed Avg. Fare	Non-Minority Existing Avg. Fare	Non-Minority Proposed Avg. Fare	Low-Income Existing Avg. Fare	Low-Income Proposed Avg. Fare	Non-Low-Income Existing Avg. Fare	Non-Low-Income Proposed Avg. Fare
\$2.55	\$0.95	\$2.58	\$0.96	\$2.57	\$0.95	\$2.56	\$0.96
Avg. % Change	-62.62%		-62.91%	Avg. % Change	-63.04%		-62.62%
		Difference	0.29%			Difference	(0.41%)
		Disparate Impact	No			Disproportionate Burden	No

Exhibit 18. Cumulative DI/DB Average Fare Analysis – 3 Zones Traveled

Minority Existing Avg. Fare	Minority Proposed Avg. Fare	Non-Minority Existing Avg. Fare	Non-Minority Proposed Avg. Fare	Low-Income Existing Avg. Fare	Low-Income Proposed Avg. Fare	Non-Low-Income Existing Avg. Fare	Non-Low-Income Proposed Avg. Fare
\$3.48	\$0.94	\$3.69	\$1.00	\$3.59	\$0.98	\$3.49	\$0.95
Avg. % Change	-72.82%		-72.90%	Avg. % Change	-72.80%		-72.86%
		Difference	0.08%			Difference	0.06%
		Disparate Impact	No			Disproportionate Burden	No

Exhibit 19. Cumulative DI/DB Average Fare Analysis – 4 Zones Traveled

Minority Existing Avg. Fare	Minority Proposed Avg. Fare	Non-Minority Existing Avg. Fare	Non-Minority Proposed Avg. Fare	Low-Income Existing Avg. Fare	Low-Income Proposed Avg. Fare	Non-Low-Income Existing Avg. Fare	Non-Low-Income Proposed Avg. Fare
\$4.48	\$0.95	\$4.70	\$1.00	\$4.68	\$1.00	\$4.54	\$0.96
Avg. % Change	-78.81%		-78.72%	Avg. % Change	-78.61%		-78.84%
		Difference	(0.08%)			Difference	0.23%
		Disparate Impact	No			Disproportionate Burden	No

PUBLIC OUTREACH AND ENGAGEMENT ACTIVITIES

DISSEMINATION OF INFORMATION, INCLUDING TO LIMITED ENGLISH PROFICIENT (LEP) PERSONS

FTA Circular 4702.1B requires transit agencies to seek public input before Board approval for Major Service Changes or Fare Changes. Caltrain’s public participation process offers early and continuous opportunities for the public (including minorities and people with low incomes) to be involved in the identification of potential impacts of proposed transportation decisions. Efforts to involve minority and low-income populations include both comprehensive measures and measures targeted at overcoming language and other barriers that prevent such populations from effective participation in decision-making.

Caltrain’s public information campaign about the fares began during the promotional period in September 2023 through various marketing campaigns via social media and on the website. For this fare adoption, Caltrain staff began with a presentation to Caltrain’s Citizens Advisory Committee on June 19, 2024, to elicit public input. Caltrain will also conduct a Public Hearing on July 22, 2024, during the Caltrain Finance Committee meeting. All public comments are available in **Attachment 11**.

Caltrain’s public participation process included measures to disseminate information on the proposed fare changes to Limited English Proficient (“LEP”) persons, as well as at public hearings and meetings. The public notices state in Caltrain’s 22 Safe Harbor Languages that translations are available by contacting the Caltrain Customer Service Center phone number. The Caltrain Customer Service Center offers foreign language translation service via in-house translators or the Language Line.

Comprehensive measures employed by Caltrain included placing public notices (**Attachment 5**) for the Public Hearing on the Caltrain website and in print advertisements of regional newspapers. (**Attachment 6**) Take Ones about the public hearing were also placed on trains beginning July 8, 2024, and were available in English, Spanish, and Traditional Chinese. (**Attachment 7**)

Caltrain staff maintains a mailing list that announces promotional fares, events, and service changes. Announcements of the fare proposal were also sent to 2 Commuter Benefit companies, 42 companies taking part in Caltrain’s GoPass program, and 35 schools and school districts in San Mateo County that take part in SamTrans’ Youth Unlimited program, including the San Mateo County Office of Education. The following is a list of Community Based Organizations that receive these announcements.

Caltrain reached out to the following Community groups and leaders:

San Francisco County

- Arab Resource & Organizing Center
- Asian Pacific American Community Center
- Bayview Footprints (by Quesada Gardens Initiative)
- Bayview Hill Neighborhood Association
- Bayview Merchants Association
- Bernal Heights Housing Corporation
- BRITE (Bayview Residents Improving Their Environment)
- Castro/Upper Market Community Benefit District
- Catholic Charities
- Causa Justa Just Cause
- Central City Hospitality House
- Chinese Progressive Association
- Community Housing Partnership
- Compass Family Services
- Dogpatch Neighborhood Association
- Dolores Street Community Services
- Excelsior District Improvement Association
- Florence Fang Community Garden
- Green Benefit District (Dogpatch & Northwest Potrero Hill)
- GreenAction
- Greenbelt Alliance
- Hunters Point Family
- India Basin Neighborhood Association
- Mission Asset Fund
- Mujeres Unidas y Activas, San Francisco
- New Door Ventures
- Pomeroy Recreation and Rehabilitation Center
- Potrero Boosters
- Potrero Hill/Dogpatch Merchants Association
- Public Advocates
- Russian American Community Services
- San Francisco Bicycle Coalition
- San Francisco Rising
- San Francisco Transit Riders
- Senior and Disability Action, San Francisco
- SF Coalition on Homelessness
- SF Mission Bay Neighborhood Association
- SPUR
- Steppingstone, San Francisco
- Urban Land Institute (San Francisco)
- Visitacion Valley Planning Alliance (VVPA)
- Walk San Francisco

San Mateo County

- Anamatangi Polynesian Voices (APV)
- Bay Area Forward
- Belle Haven Action
- Catholic Charities Resettlement Program
- Chicana Latina Foundation
- Child Care Coord. Council
- Clean Coalition
- Coastside Hope
- College of San Mateo
- College Track
- College Track East Palo Alto
- Commission on Aging
- Daly City Community Service Center
- Daly City Partnership
- East Palo Alto Senior Center
- Ecumenical Hunger Program
- Fair Oaks Community Center
- Faith in Action
- Family Health Services
- Friends of Caltrain
- Housing Leadership Council
- Japanese American Community Center
- Japanese American Community Center
- Japanese Chamber of Commerce
- Language Pacifica
- Lesley Senior Communities, San Mateo
- LifeMoves,
- Menlo SPARK
- Mid-Peninsula Boys and Girls Club
- Midcoast Community Council
- Mid-Peninsula Housing
- Moon Ridge Apartments
- NAACP San Mateo County Chapter
- Next Step Veterans Resource Center
- Non-Profit Housing Association of Northern California
- Northern Peninsula Food Pantry and Dining Center
- Northern Peninsula Mandarin School
- Nuestra Casa
- One East Palo Alto,
- Our Lady of the Pillar Catholic Church
- Our Second Home
- Pacifica Resource Center
- PARS Equality Center
- Peninsula Family Service
- Peninsula Interfaith Action
- Pillar Ridge Manufactured Housing Community
- Project WeHope
- Redwood City 2020
- Renaissance Center Mid-Peninsula
- Safe Harbor Shelter
- Safe Routes to School Program at County Office of Education
- Samaritan House
- Sierra Club, Loma Prieta Chapter
- Sikh Gurdware of San Francisco
- Sitike Counseling Center
- Skyline College
- StarVista
- Yaseen Foundation
- Youth Leadership Institute
- Youth United for Community Action (YUCA)
- Zawayya

Santa Clara County

- **Asian Pacific Islander American Public Affairs Association, Peninsula Chapter**
- **BayRail Alliance**
- **City Team**
- **Committee for Green Foothills**
- **Day Worker Center of Mountain View**
- **Destination Home**
- **Ethiopian Community Services**
- **Family Giving Tree**
- **Family Supportive Housing, Inc.**
- **First Community Housing**
- **Grail Family Services**
- **Heart of the Valley**
- **Home First**
- **India Community Center**
- **Joint Venture Silicon Valley**
- **Live Oak Adult Day Services**
- **Mayfair Neighborhood Advisory Coalition, San Jose**
- **Mountain View Coalition for Sustainable Planning**
- **Palo Alto Housing**
- **Project Hired**
- **Public Allies - San Francisco, Silicon Valley**
- **Rahima Foundation**
- **Sacred Heart Community Service**
- **Salvation Army Family Services - San Jose**
- **Santa Clara & San Benito Counties Building & Construction Trades Council**
- **Santa Clara County Central Labor Council (South Bay AFL-CIO Labor Council)**
- **Silicon Valley Community Foundation**
- **Stevenson House**
- **Sustainable Silicon Valley**
- **The Five Wounds/Brookwood Terrace Neighborhood Action Coalition**
- **Transportation Justice Alliance**
- **Upward Scholars**
- **Vietnamese American Community Center, San Jose**
- **Vista Center for the Blind and Visually Impaired**
- **Working Partnerships**

Measures taken to overcome linguistic, institutional, and cultural barriers that may prevent minority and low-income populations from participating in decision-making included publishing the public hearing notice and public meeting notices in newspapers of general circulation and two community newspapers in different languages. (**Attachment 6**)

Notifications for the public hearing and public meetings appeared in the newspapers listed in **Exhibit 15**. El Observador is published in Spanish, and Sing Tao is published in Chinese.

Exhibit 15. Print Advertisement of Public Notices

	Newspaper	Run Date(s)
1	San Francisco Chronicle	7/7/2024, 7/12/2024
2	San Mateo Daily Journal	7/7/2024, 7/12/2024
3	San Jose Mercury News	7/7/2024, 7/12/2024
4	El Observador	7/12/2024
5	Sing Tao	7/12/2024

Staff also established multiple ways for customers and the public to provide their input: at public meetings and interacting with the Caltrain website and social media. For those without access to the internet or smartphones, through the postal service (by mail), by telephone call to the Customer Service Center’s general number or one for those with hearing impairments, through the unique e-mail address, **changes@caltrain.com**, and via an online comment form on the dedicated webpage, <https://www.caltrain.com/fares/farechart>.

PUBLIC OUTREACH

Caltrain held one public meeting during the Caltrain Citizens Advisory Committee meeting on June 19, 2024. Translation and interpretation services were available upon request. No requests for translation or interpretation were received. The meeting minutes captured one public comment regarding the fare discounts.

Caltrain has communicated the launch of these fare promotions to the public through their social media channels, including Twitter (now X), Facebook, and Instagram. A compiled list of these social media posts is provided in **Attachment 8**.

In addition to social media outreach, marketing efforts for the new fare promotions began on August 24, 2023, with press releases on Caltrain’s website. These include an announcement post regarding the promotion’s extension in March 2024 and a notice about the Public Hearing on July 22, 2024. (**Attachment 9**)

Leading up to the public hearing about the permanent adoption of the proposed fare discounts, Caltrain launched a press release on July 17, 2024, with translation and interpretation services available upon request.

A strategic marketing campaign utilizing both social media and in-person outreach will be in place after Board Approval as the new fare structure will be in effect beginning September 1, 2024.

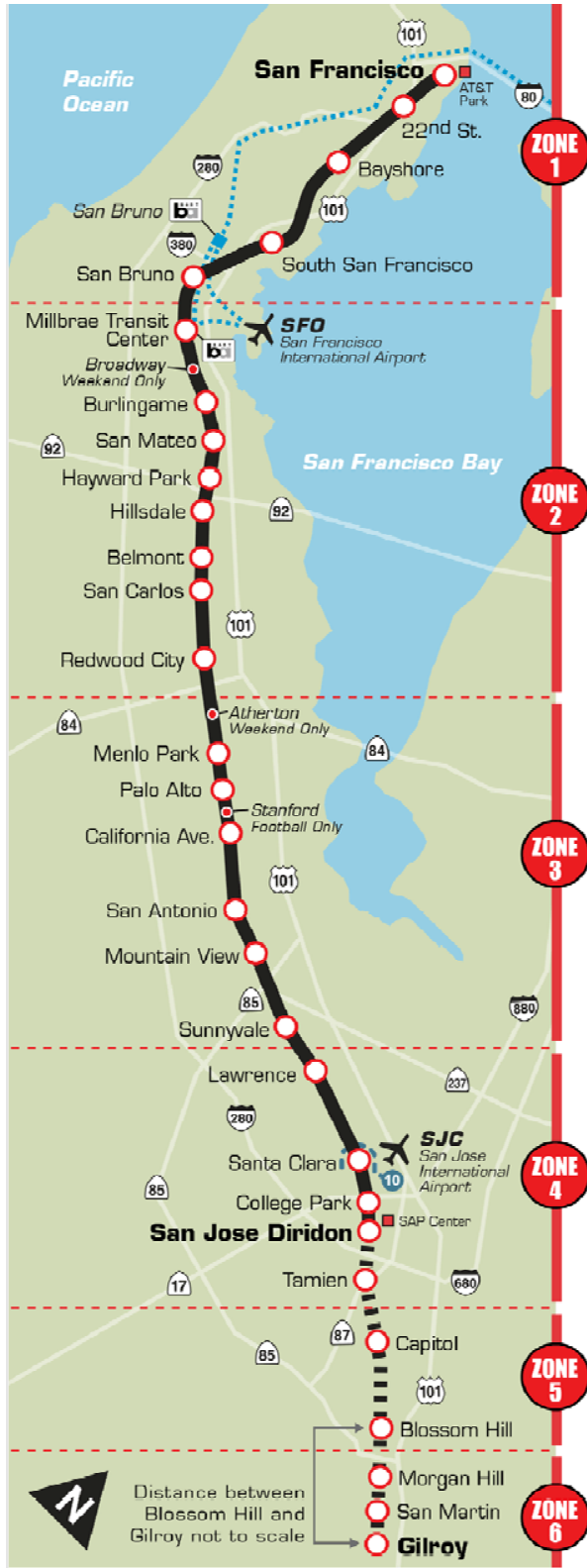
PUBLIC COMMENTS

Summary of Comments

As of July 18, 2024, Caltrain has received limited public comments. In the approved minutes from the June 19, 2024, Citizens Advisory Committee, there was one public comment. No additional comments were received via email at this time. On Caltrain's official Twitter (now X) account there was one public reply to the Fare Promotions post from April 3, 2024.

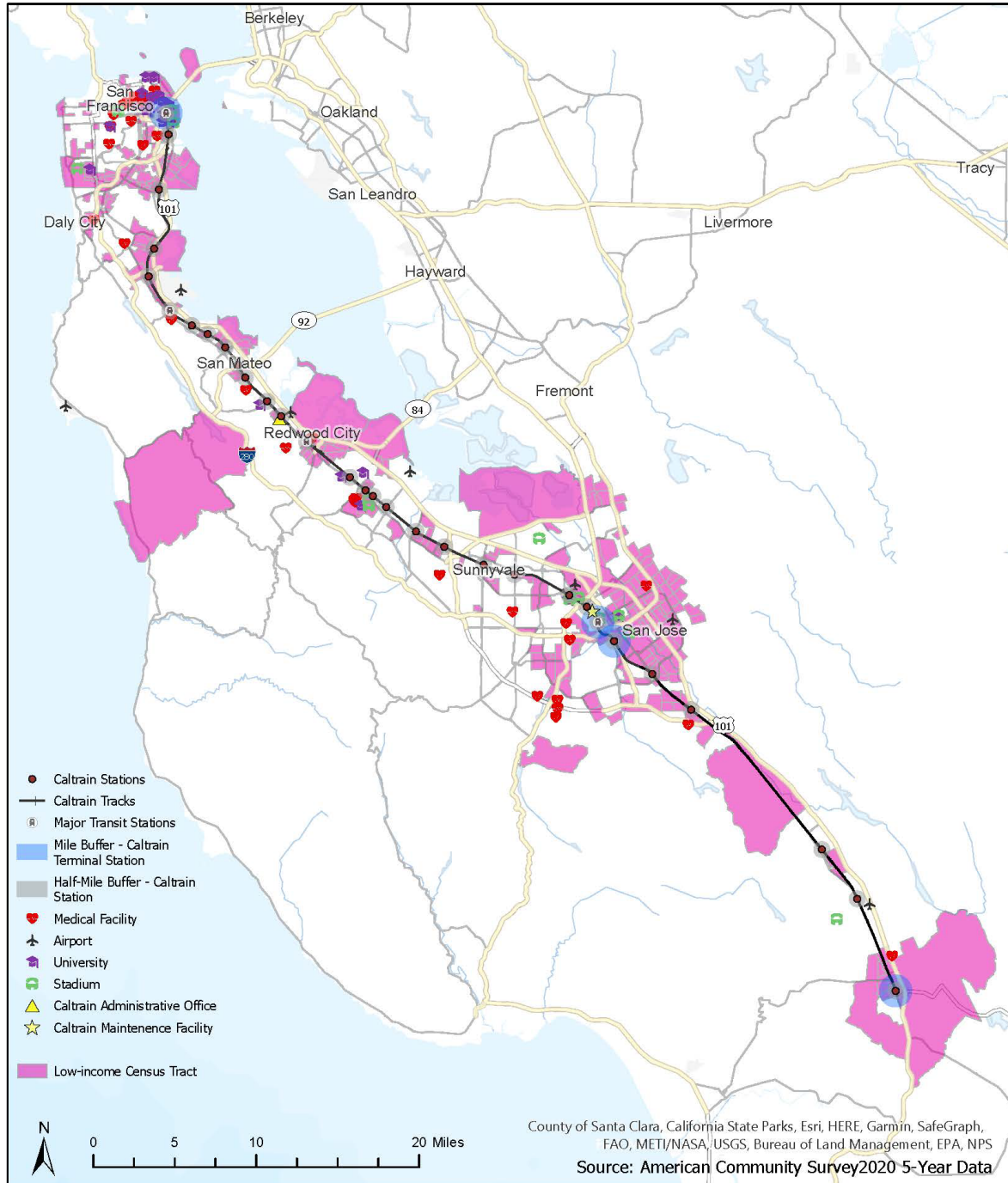
Caltrain staff will update this section with any public comments received during the Public Hearing on July 22, 2024, and will be compiled in **Attachment 11**.

**ATTACHMENT 1 –
CALTRAIN SYSTEM MAP**

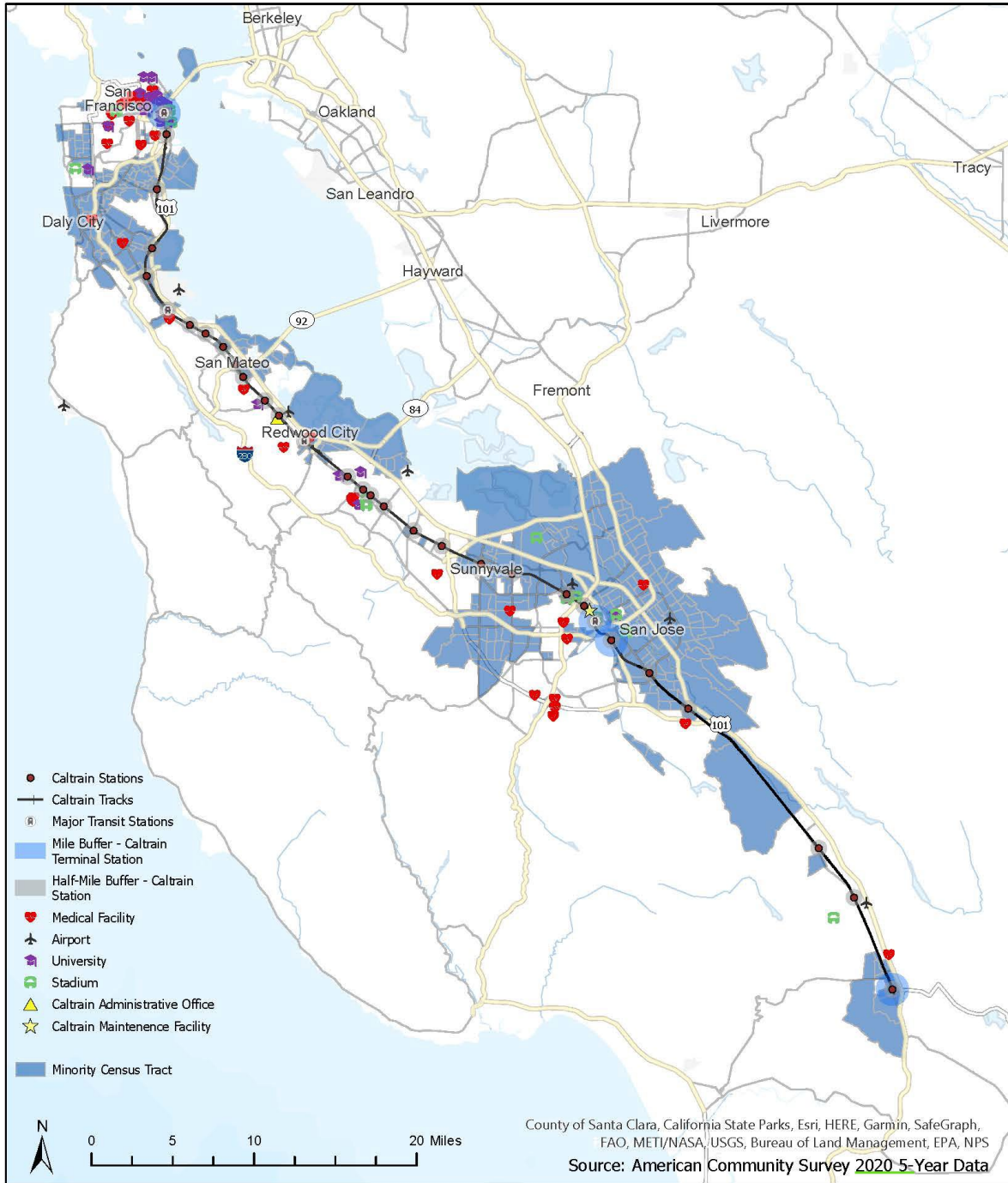


**ATTACHMENT 2 – SERVICE AREA DEMOGRAPHICS:
LOW-INCOME AND MINORITY**

Low Income Census Tracts



Minority Census Tracts



**ATTACHMENT 3 –
BOARD APPROVAL OF MAJOR SERVICE CHANGE, DISPARATE
IMPACT POLICY, AND DISPRORTIONATE BURDEN POLICY**

RESOLUTION NO. 2013 – 21

BOARD OF DIRECTORS, PENINSULA CORRIDOR JOINT POWERS BOARD
STATE OF CALIFORNIA

* * *

ADOPTION OF SYSTEM-WIDE SERVICE STANDARDS AND POLICIES, DEFINITION OF "MAJOR SERVICE CHANGE," AND DISPARATE IMPACT AND DISPROPORTIONATE BURDEN POLICIES REQUIRED FOR COMPLIANCE WITH TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

WHEREAS, Title VI of the Civil Rights Act of 1964 requires recipients of Federal grants and other assistance to operate their programs and services without regard to, or discrimination based on, race, color or national origin; and

WHEREAS, the Federal Transit Administration (FTA) issued Circular FTA C 4702.1B, effective October 1, 2012, setting forth requirements and guidelines for Title VI compliance; and

WHEREAS, as set forth in the above-referenced Circular, the Board of Directors is required to adopt System-Wide Service Standards and Policies to guide the equitable distribution of Caltrain programs and services; and

WHEREAS, the JPB is also required to adopt policies to define when a service change is sufficiently broad or large to necessitate a review of its potential impacts on minority and low-income populations, and to define when a fare change or major service change will have a disparate impact on minority populations or impose a disproportionate burden on low-income populations, all of which policies and definitions are required to be subject to public input; and

WHEREAS, over the past two months, JPB staff has presented draft policies to this Board and the public in Board meetings and other public meetings, undertaken extensive public outreach and accepted public comment on the policies; and

WHEREAS, the Staff Coordinating Council recommends the Board approve the attached System-Wide Service Standards and Policies, definition of "Major Service Change," and Disparate Impact and Disproportionate Burden Policies, which comply with FTA requirements and which will guide future decisions regarding and monitoring of Caltrain programs and services to ensure that they are provided equitably, without discrimination based on race, color or national origin.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of the Peninsula Corridor Joint Powers Board hereby approves the attached System-Wide Service Standards and Policies, definition of "Major Service Change," and Disparate Impact and Disproportionate Burden Policies.

Regularly passed and adopted this 4th day of April, 2013 by the following vote:

AYES: CISNEROS, COHEN, DEAL, KALRA, LLOYD, NOLAN,
 TISSIER, YEAGER

NOES: NONE

ABSENT: WOODWARD



Chair, Peninsula Corridor Joint Powers Board

ATTEST:



JPB Secretary

MAJOR SERVICE CHANGE POLICY

SERVICE CHANGES

All major increases or decreases in transit service are subject to a Title VI Equity Analysis prior to Board approval of the service change. A Title VI Equity Analysis completed for a major service change must be presented to the Caltrain Board for its consideration and included in the Caltrain Title VI Program with a record of the action taken by the Board.

Caltrain defines a major service change as any service change meeting at least one or both of the following criteria:

- A. An adjustment of service that equates to a reduction of or addition of 25 percent or more in total revenue train miles per day for the service day of the week (weekday, Saturday or Sunday) for which the change is made.
- B. A greater than 50 percent reduction or increase in the number of stops at a station per day for the service day of the week (weekday, Saturday or Sunday) for which the change is made.

Note: Any change that is a temporary or interim change due to construction or maintenance projects is exempted from the definition and is not considered a “major service change.”

DISPARATE IMPACT POLICY

This policy establishes a threshold for determining whether a given action has a disparate impact on minority populations versus non-minority populations. Per FTA Circular 4702.1B:

Disparate impact refers to a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the recipient's policy or practice lacks a substantial legitimate justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin....

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by minority populations. The disparate impact threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by minority populations compared to impacts borne by non-minority populations. The disparate impact threshold must be applied uniformly...and cannot be altered until the next Title VI Program submission.

In the course of performing a Title VI Equity Analysis, Caltrain must analyze how the proposed action would impact minority as compared to non-minority populations. In the event the proposed action has a negative impact that affects minorities more than non-minorities with a disparity that exceeds the adopted Disparate Impact Threshold or that benefits non-minorities more than minorities with a disparity that exceeds the adopted Disparate Impact Threshold, Caltrain must evaluate whether there is an alternative that has a more equitable impact. Otherwise, Caltrain must take measures to mitigate the impact of the proposed action on the affected minority population and demonstrate that a legitimate business purpose cannot otherwise be accomplished and that the proposed change is the least discriminatory alternative.

The Caltrain Disparate Impact Threshold to determine if the adverse impacts of a major service change (as defined in the first part of this document) or a fare adjustment is established at 10 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by minority populations compared to the same impacts borne by non-minority populations.

DISPROPORTIONATE BURDEN POLICY

This policy establishes a threshold for determining whether a given action has a disproportionate burden on low-income populations versus non-low-income populations. The Disproportionate Burden Policy applies only to low-income populations that are not also minority populations. Per FTA Circular 4702.1B:

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by low-income populations. The disproportionate burden threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by low-income populations as compared to impacts borne by non-low-income populations.... The disproportionate burden threshold must be applied uniformly...and cannot be altered until the next [Title VI] program submission.

At the conclusion of the analysis, if the transit provider finds that low-income populations will bear a disproportionate burden of the proposed [fare/]service change, the transit provider should take steps to avoid, minimize or mitigate impacts where practicable. The provider should describe alternatives available to low-income populations affected by the [fare/]service changes.

The Caltrain Disproportionate Burden Threshold to determine if the adverse impacts of a major service change (as defined in the first part of this document) or a fare adjustment is established at 10 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by low-income populations compared to the same impacts borne by non-low-income populations.

Board Meeting Minutes (April 4, 2013)

Joint Powers Board Meeting
Minutes April 4, 2013

and Castro Street in Mountain View. Selection of these sites was coordinated with the California Public Utilities Commission and JPB staff.

Public Comment

Adina Levin, Friends of Caltrain, said the changes in the signal contract involve increasing gate down time at five intersections and re-signalizing the traffic lights. She hopes there is outreach to the affected communities.

Jeff Carter, Millbrae, said there will be some increased gate down time and when a train is at a station he hopes the gate will time out and release so traffic is not stopped the entire time the train is at the station.

A motion (Tissier/Nolan) to award a contract to Shimmick Construction for the Signal Preemption Improvement Project was approved unanimously.

AUTHORIZE THE SECOND AMENDMENT OF THE USE, OPERATING AND MAINTENANCE (UOM) AGREEMENT FOR THE MILLBRAE INTERMODAL STATION

Deputy CEO Chuck Harvey said when the Millbrae Intermodal Station was completed, the JPB entered into a cost-sharing agreement with BART to maintain the station. The costs were allocated through a cost model. This amendment codifies the agreement through FY2018 and the costs are being controlled by an agreement so they won't increase beyond the Consumer Price Index inflation.

A motion (Lloyd/Nolan) to authorize the second amendment of the UOM agreement for the Millbrae Intermodal Station was approved unanimously.

ADOPTION OF CALTRAIN TITLE VI STANDARDS AND POLICIES

Director, Rail Michelle Bouchard reported:

- The Federal Transit Administration requires approval and submission of five standards and policies.
 - The Major Service Change Policy is the criteria for determining when service change is significant enough to require a thorough analysis of potential effects on protected populations. Staff is recommending a change of 25 percent or more total train revenue miles and greater than 50 percent change in the number of trains stopping at a station per day.
 - Disparate Impact and Disproportionate Burden Policies determine the threshold when adverse effects of a fare or service changes are borne disproportionately by minority or low-income populations. Staff is recommending a 10 percent threshold.
 - Services Standards and Policies are established to monitor performance in quantifiable and qualitative measures/metrics. Service standards include vehicle load, vehicle headway, on-time performance and service availability. Service policies are vehicle assignment and transit amenities.
- Four community meetings were held and comments were accepted through March 29. Meetings were sparsely attended and only one comment was received.

Board Meeting Minutes (April 4, 2013 - Continued)

Joint Powers Board Meeting
Minutes April 4, 2013

Public Comment

Roland LeBrun, San Jose, said staff has to ensure cash customers are not targeted because most cash customers are minorities.

A motion (Lloyd/Tissier) to adopt the Caltrain Title VI Standards and Policies was approved unanimously.

LEGISLATIVE UPDATE

State Update

Executive Officer, Public Affairs Mark Simon said Acting Business Transportation and Housing Secretary Brian Kelly has formed a California Transportation Finance Working Group to explore options for meeting the State's long-term transportation funding needs and priorities. Public transit agencies will be represented on the working group through the California Transit Association. The first meeting is April 9 and one of the first things the group will be discussing is a recent report issued by the American Society of Civil Engineers which gave the State an overall grade of "C" for its infrastructure and cites "a lack of sufficient investment for the operations and maintenance of existing facilities and dedicated funding sources for new improvements to the system. There is a need for \$10 billion per year more to be spent for ongoing maintenance of existing facilities and an investment of \$36.5 billion to raise transportation to a "B" grade."

Federal Update

Mr. Simon said Congress is working to pass a continuing resolution and start work on the FY2014 appropriations process. Last year the Federal investment in the California High Speed Rail Project was a key topic during the appropriations process. Republican Congressmembers Jeff Denham and Kevin McCarthy requested the Government Accountability Office (GAO) review the project's cost, ridership and revenue projections. The GAO report released last week gave the project an overwhelmingly positive review.

Mr. Simon said there was a home value study done by the American Public Transportation Association and the Association of Realtors that showed property within a half-mile of transit sustained its value more effectively during the recession and rebounded more rapidly.

CORRESPONDENCE

No discussion.

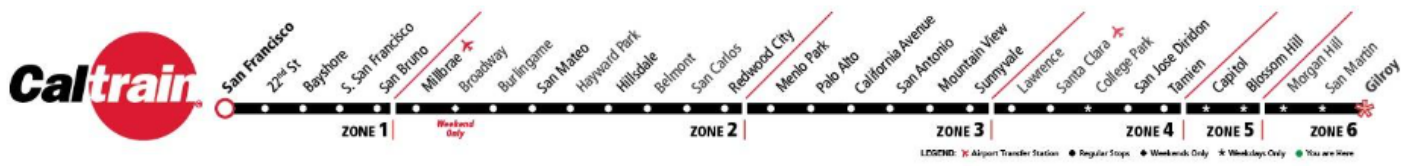
BOARD MEMBER REQUESTS

None

GENERAL COUNSEL REPORT

Mr. Miller said staff has contacted the general counsel for the CHSRA to see if their chair indicated Caltrain would respond to Mr. Brown's request. It is clear Proposition 1A is going to be complied with in the final analysis and the agreement that has been entered into codifies the blended system as the plan around which HSR will be designed and constructed and contains a funding plan template. Over time the funding plan will evolve as estimates are prepared and the public can be assured

**ATTACHMENT 4 –
EXISTING FARE CHART**



Adult Full Fare (19-64 years old)

Ticket Type*	How to Buy	Travel within					
		1 Zone	2 Zones	3 Zones	4 Zones	5 Zones	6 Zones
One Way <i>One way, valid for use within four hours of the date and time sold.</i>	Ticket Machine Caltrain Mobile	\$3.75	\$6.00	\$8.25	\$10.50	\$12.75	\$15.00
	Clipper Card	\$3.20	\$5.45	\$7.70	\$9.95	\$12.20	\$14.45
Day Pass+ <i>Unlimited travel within zone limits.</i>	Ticket Machine Caltrain Mobile	\$7.50	\$12.00	\$16.50	\$21.00	\$25.50	\$30.00
Zone Upgrade <i>Upgrade your ticket; Valid only when accompanying another valid ticket and cannot be used alone. Valid for use within four hours of the date and time sold.</i>	Ticket Machine Caltrain Mobile	\$2.25 per zone					
Monthly Pass+ <i>Valid for use for the calendar month for which issued unlimited trips between zones on pass. Weekends & holidays, unlimited trips between all zones.</i>	Clipper Card	\$76.80	\$130.80	\$184.80	\$238.80	\$292.80	\$346.80

*VTA-Caltrain Day Pass - Available on the Caltrain Mobile app the Caltrain portion is valid to Zone 3 and costs an additional \$7.50 compared to a Caltrain Day Pass. The joint pass is valid on Caltrain through the last train of the night, and on VTA buses and light rail until 3 a.m.

** Customers with a two-zone or greater Caltrain Monthly Pass get free local rides or free local ride credits on SamTrans. Visit the Visit the [SamTrans Inter-Agency Transfers](#) page for details. VTA (Santa Clara Valley Transportation Authority) offers Caltrain customers with a two-zone or greater Caltrain Monthly Pass free transfers to VTA local, limited stop bus, bus rapid transit and light rail. For more information visit the [VTA Caltrain Fares](#) page.

Eligible Discount Fare Chart (Senior / Disabled / Youth / Medicare Cardholder)

Senior / Disabled / Youth / Medicare Cardholder Definitions

Ticket Type*	How to Buy	Travel within					
		1 Zone	2 Zones	3 Zones	4 Zones	5 Zones	6 Zones
One Way <i>One way, valid for use within four hours of the date and time sold.</i>	Ticket Machine Caltrain Mobile	\$1.75	\$2.75	\$3.75	\$4.75	\$5.75	\$6.75
	Clipper Card	\$1.60	\$2.60	\$3.60	\$4.60	\$5.60	\$6.60
Day Pass* <i>Unlimited travel within zone limits</i>	Ticket Machine Caltrain Mobile	\$3.50	\$5.50	\$7.50	\$9.50	\$11.50	\$13.50
Zone Upgrade <i>Upgrade your ticket; Valid only when accompanying another valid ticket and cannot be used alone. Valid for use within four hours of the date and time sold.</i>	Ticket Machine Caltrain Mobile	\$1.00 per zone					
Monthly Pass+ <i>Valid for use for the calendar month for which issued unlimited trips between zones on pass. Weekends & holidays, unlimited trips between all zones.</i>	Clipper Card	\$38.40	\$62.40	\$86.40	\$110.40	\$134.40	\$158.40

Eligible Discount Fare **+

*TA-Caltrain Day Pass - The Caltrain portion is valid to Zone 3 and costs an additional \$7.50 compared to a Caltrain Day Pass. The joint pass is valid on Caltrain through the last train of the night, and on VTA buses and light rail until 3 a.m.

**ATTACHMENT 5 –
NOTICES OF PUBLIC HEARING**

**Peninsula Corridor Joint Powers Board (PCJPB)
PUBLIC HEARING & MEETING NOTICE
Proposed Fare and Fare Structure Changes**

Peninsula Corridor Joint Powers Board (PCJPB), which operates Caltrain, will hold a public hearing at the PCJPB Finance Committee meeting on Monday, July 22, 2024, to receive public comment to the proposed changes (listed below) to the Caltrain Fare Structure.

PCJPB will hold a public hearing to receive public comment on the following Fare Structure Changes:

- \$1 Youth One-way Fares (available through all distribution channels effective 9/1/24)
- \$2 Youth Day Passes (available through Caltrain station ticket machine and Mobile App effective 9/1/24)
- \$24 Youth Monthly Pass (effective upon Clipper Next Generation execution)

Public Hearing

The Peninsula Corridor Joint Powers Board (PCJPB) invites public comment on the potential changes at the hearing. The public may participate via a Zoom web link and/or by phone.

**Monday, July 22, 2024, at 2:30 pm
(or as soon thereafter as the matter may be heard)**

Zoom Info:

<https://us02web.zoom.us/j/81843266625?pwd=aDEtTGltUUJSOUc5TkNnbU1QMTRHUT09>

Webinar ID: 818 4326 6625

Access via Telephone: 1.669.4449171; Meeting ID: 81843266625

Prior to the hearing, comments may be sent by mail, e-mail, or phone:

Board Secretary

Peninsula Corridor Joint Powers Board

P.O. Box 3006, San Carlos, CA 94070-1306

changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)

For translation or interpretation assistance, call Caltrain at 1.800.660.4287 at least three days before the meeting.

Para traducción llama al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

**Junta de Poderes Conjuntos del Corredor de la Península (PCJPB)
AVISO DE AUDIENCIA Y REUNIÓN PÚBLICAS
Cambios Propuestos a las Tarifas de Transporte y su Estructura**

El lunes 22 de julio de 2024, la Junta de Poderes Conjuntos del Corredor de la Península (PCJPB), la entidad que opera Caltrain, celebrará una audiencia pública en la reunión del Comité de Finanzas con el fin de recibir comentarios del público sobre los cambios propuestos a la estructura de las tarifas de transporte de Caltrain (los cuales se indican a continuación).

La PCJPB celebrará una audiencia pública para recibir los comentarios del público sobre los siguientes cambios en la estructura de las tarifas de transporte:

- Tarifas de \$1 para jóvenes en viajes sencillos (disponibles a través de todos los canales de distribución a partir del 1 de septiembre de 2024)
- Pases de un día para jóvenes con una tarifa de \$2 (disponible a través de las máquinas expendedoras de boletos de las estaciones y de la aplicación móvil de Caltrain a partir del 1 de septiembre de 2024)
- Pase mensual para jóvenes con una tarifa de \$24 (a partir de la ejecución de Clipper Next Generation)

Audiencia pública

La Junta de Poderes Conjuntos del Corredor de la Península (PCJPB) invita al público a dar sus comentarios sobre estos posibles cambios durante la audiencia. La gente puede participar a través de un enlace web Zoom y/o por teléfono.

**Lunes, 22 de julio de 2024 a las 2:30 p.m.
(o tan pronto como el asunto pueda ser considerado)**

Información para comunicarse por Zoom:

<https://us02web.zoom.us/j/81843266625?pwd=aDExTGltUUJSOUc5TkNnbU1QMTRHUT09>

Identificación del seminario web: 818 4326 6625

Acceso por teléfono: 1.669.4449171; Identificación de la reunión: 81843266625

Antes de la audiencia, los comentarios pueden enviarse por correo postal, por correo electrónico o por teléfono:

**Board Secretary
Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA 94070-1306
changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)**

Para solicitar servicio de traducción o interpretación, llame a Caltrain al 1.800.660.4287 al menos tres días antes de la reunión.

Para traducción llama al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

Peninsula Corridor Joint Powers Board PUBLIC HEARING & MEETING NOTICE – CHINESE

**半島走廊聯合監管董事會 (Peninsula Corridor Joint Powers Board, PCJPB)
公聽會及會議通知
車費及車費結構變更提案**

加州鐵路 (Caltrain) 營運機構半島走廊聯合監管董事會 (PCJPB) 將於 2024 年 7 月 22 日 (星期一) 在 PCJPB 財務委員會會議期間舉行公聽會，聽取大眾對 Caltrain 車費結構變更 (見下文) 提案的意見。

PCJPB 將舉行公聽會，聽取大眾對以下車費結構變更的意見：

- 青少年單程票價 \$1 (2024 年 9 月 1 日開始可透過所有銷售渠道購買)
- 青少年日票票價 \$2 (2024 年 9 月 1 日開始可透過 Caltrain 車站售票機和流動應用程式購買)
- 青少年月票票價 \$24 (Clipper Next Generation 執行時生效)

公聽會

半島走廊聯合監管董事會 (PCJPB) 邀請大眾參與公聽會並就可能的變更提供意見。大眾可以透過 Zoom 網站連結和/或電話參加會議。

**2024 年 7 月 22 日 (星期一) 下午 2:30
(或在本事項聽證後立即舉行)**

Zoom 資訊：

<https://us02web.zoom.us/j/8184326625?pwd=aDExTGltUUJSOUc5TkNnbU1QMTRHUT09>

網絡研討會 ID：818 4326 6625

透過電話參加：1.669.4449171；會議 ID：8184326625

在聽證會舉行前，大眾可透過郵遞、電郵或電話提出意見：

**Board Secretary
Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA 94070-1306
changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)**

如需翻譯或口譯協助，請在會議前至少三天撥打 1.800.660.4287 與 Caltrain 聯絡。

Para traducción llama al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

**ATTACHMENT 6 –
PRINT ADVERTISEMENTS OF NOTICES OF PUBLIC
HEARING AND MEETING**

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Notice Type: HRG NOTICE OF HEARING
Ad Description: Proposed Fare and Fare Structure Changes

To the right is a copy of the notice you sent to us for publication in the SAN FRANCISCO CHRONICLE. Please read this notice carefully and call us with any corrections. The Proof of Publication will be filed with the County Clerk, if required, and mailed to you after the last date below. Publication date(s) for this notice is (are):

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ORANGE COUNTY REPORTER, SANTA ANA (714) 543-2027
SAN FRANCISCO DAILY JOURNAL, SAN FRANCISCO (800) 640-4829
SAN JOSE POST-RECORD, SAN JOSE (408) 287-4866
THE DAILY RECORDER, SACRAMENTO (916) 444-2355
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THE INTER-CITY EXPRESS, OAKLAND (510) 272-4747

CNS 3826717

Peninsula Corridor Joint Powers Board (PCJPB) PUBLIC HEARING & MEETING NOTICE Proposed Fare and Fare Structure Changes

Peninsula Corridor Joint Powers Board (PCJPB), which operates Caltrain, will hold a public hearing at the PCJPB Finance Committee meeting on Monday, July 22, 2024, to receive public comment to the proposed changes (listed below) to the Caltrain Fare Structure.

PCJPB will hold a public hearing to receive public comment on the following Fare Structure Changes:

- \$1 Youth One-way Fares (available through all distribution channels effective September 1, 2024)
- \$2 Youth Day Passes (available through Caltrain station ticket machine and Mobile App effective September 1, 2024)
- \$24 Youth Monthly Pass (effective upon Clipper Next Generation execution)

Public Hearing

The Peninsula Corridor Joint Powers Board (PCJPB) invites public comment on the potential changes at the hearing. The public may participate via a Zoom web link and/or by phone.

Monday, July 22, 2024, at 2:30 pm (or as soon thereafter as the matter may be heard)

Zoom Info:

https://un02web.zoom.us/j/81843166625?pwd=aERlTGhUUFpOUzU5TGhNbnU1QkMlRkhuT09

Webinar ID: 818 4326 6625

Access via Telephone: 1.669.444.9171;

Meeting ID: 81843166625

Prior to the hearing, comments may be sent by mail, e-mail, or phone:

Board Secretary

Peninsula Corridor Joint Powers Board P.O. Box 3006, San Carlos, CA 94070 - 1306

changes@caltrain.com 1.800.660.4287

(TTY 650.508.6448)

For translation or interpretation assistance, call Caltrain at 1.800.660.4287 at least three days before the meeting.

Para traducción llaman al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

7/7, 7/12/24

CNS-3826717#



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SAN MATEO CO TRANSIT DIST/DIRECTOR
MARKETING
PO BOX 3006
SAN CARLOS, CA 94070-1306

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Ad Description: Proposed Fare and Fare Structure Changes

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CNS 3826722

Peninsula Corridor Joint Powers Board (PCJPB) PUBLIC HEARING & MEETING NOTICE

Proposed Fare and Fare Structure Changes
Peninsula Corridor Joint Powers Board (PCJPB), which operates Caltrain, will hold a public hearing at the PCJPB Finance Committee meeting on Monday, July 22, 2024, to receive public comment to the proposed changes (listed below) to the Caltrain Fare Structure. PCJPB will hold a public hearing to receive public comment on the following Fare Structure Changes:
- \$1 Youth One-way Fares (available through all distribution channels effective September 1, 2024)
- \$2 Youth Day Passes (available through Caltrain station ticket machine and Mobile App effective September 1, 2024)
- \$24 Youth Monthly Pass (effective upon Clipper Next Generation execution)

Public Hearing
The Peninsula Corridor Joint Powers Board (PCJPB) invites public comment on the potential changes at the hearing. The public may participate via a Zoom web link and/or by phone.

Monday, July 22, 2024, at 2:30 pm
(or as soon thereafter as the matter may be heard)

Zoom Info:
https://us02web.zoom.us/j/61843286825?pwd=ExtGTRUJ8OUo5TkNlbU1GMTRHUT08
Webinar ID: 618 4328 6825

Access via Telephone:
1.888.448.1711 Meeting ID: 61843286825

Prior to the hearing, comments may be sent by mail, e-mail, or phone:

Board Secretary
Peninsula Corridor Joint Powers Board
P.O. Box 3008, San Carlos, CA 94070 - 1308
ohanges@caltrain.com
1.800.660.4287 (TTY 860.608.8448)

For translation or interpretation assistance, call Caltrain at 1.800.660.4287 at least three days before the meeting.

Para traducción llama al 1.800.660.4287.
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MARKETING
PO BOX 3006
SAN CARLOS, CA 94070-1306

CNS 3828724

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Notice Type: HRG NOTICE OF HEARING
Ad Description: Proposed Fare and Fare Structure Changes

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Table with 2 columns: Newspaper Name and Phone Number. Includes entries for Riverside, Los Angeles, Santa Ana, San Francisco, San Jose, Sacramento, San Diego, and Oakland.

Junta de Poderes Conjuntos del Corredor de la Península (PCJPB)
AVISO DE AUDIENCIA Y REUNIÓN PÚBLICAS
Cambios Propuestos a las Tarifas de Transporte y su Estructura
El lunes 22 de julio de 2024, la Junta de Poderes Conjuntos del Corredor de la Península (PCJPB), la entidad que opera Caltrain, celebrará una audiencia pública en la reunión del Comité de Finanzas con el fin de recibir comentarios del público sobre los cambios propuestos a la estructura de las tarifas de transporte de Caltrain (los cuales se indican a continuación).
La PCJPB celebrará una audiencia pública para recibir los comentarios del público sobre los siguientes cambios en la estructura de las tarifas de transporte:
- Tarifas de \$1 para jóvenes en viajes sencillos (disponibles a través de todos los canales de distribución a partir del 1 de septiembre de 2024)
- Pases de un día para jóvenes con una tarifa de \$2 (disponible a través de las máquinas expendedoras de boletos de las estaciones y de la aplicación móvil de Caltrain a partir del 1 de septiembre de 2024)
- Pase mensual para jóvenes con una tarifa de \$24 (a partir de la ejecución de Clipper Next Generation)
Audiencia pública
La Junta de Poderes Conjuntos del Corredor de la Península (PCJPB) invita al público a dar sus comentarios sobre estos posibles cambios durante la audiencia. La gente puede participar a través de un enlace web Zoom y/o por teléfono.

Lunes, 22 de julio de 2024 a las 2:30 p.m.
(o tan pronto como el asunto pueda ser considerado)

Información para comunicarse por Zoom:
https://us02web.zoom.us/j/8184326625?pwd=aDExTGltUjJSOUc0c0RkbU1QMTRHUT09
Identificación del seminario web: 818 4326 625
Acceso por teléfono: 1.659.4449171; Identificación de la reunión: 8184326625
Antes de la audiencia, los comentarios pueden enviarse por correo postal, por correo electrónico o por teléfono:

Board Secretary
Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA 94070 - 1306
changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)

Para solicitar servicio de traducción o interpretación, llame a Caltrain al 1.800.660.4287 al menos tres días antes de la reunión.
Para traducción llame al 1.800.660.4287;
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7/12/24
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SAN CARLOS, CA 94070-1306

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Notice Type: HRG NOTICE OF HEARING
Ad Description: Proposed Fare and Fare Structure Changes

To the right is a copy of the notice you sent to us for publication in the SING TAO (S.F.). Please read this notice carefully and call us with any corrections. The Proof of Publication will be filed with the County Clerk, if required, and mailed to you after the last date below. Publication date(s) for this notice is (are):

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CNS 3826726

半島走廊聯合監管董事會 (Peninsula Corridor Joint Powers Board, PCJPB) 公聽會及會議通知
車費及車費結構變更提案
加州鐵路 (Caltrain) 營運機構半島走廊聯合監管董事會 (PCJPB) 將於 2024 年 7 月 22 日 (星期一) 在 PCJPB 財務委員會會議期間舉行公聽會。聽取大眾對 Caltrain 車費結構變更 (見下文) 提案的意見。
PCJPB 將舉行公聽會，聽取大眾對以下車費結構變更的意見：
- 青少年單程票價 \$1 (2024 年 9 月 1 日開始可透過所有銷售渠道購買)
- 青少年月票票價 \$2 (2024 年 9 月 1 日開始可透過 Caltrain 車站售票機和流動應用程式購買)
- 青少年月票票價 \$24 (Clipper Next Generation 執行時生效)

公聽會
半島走廊聯合監管董事會 (PCJPB) 邀請大眾參與公聽會並就可能的變更提供意見。大眾可以透過 Zoom 網站連結和或電話參加會議。

2024 年 7 月 22 日 (星期一) 下午 2:30
(或在本事項聽證後立即舉行)

Zoom 資訊:
https://us02web.zoom.us/j/81843266625?pwd=AEtGItUJUSOUcStkNbnU1Qm1RbU09
網絡研討會 ID : 818 4326 6625
透過電話參加 : 1.665.444.1171 ; 會議 ID : 81843266625

在聽證會舉行前，大眾可透過郵遞、電郵或電話提出意見：

Board Secretary
Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA 94070 - 1306
changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)

如需翻譯或口譯協助，請在會議前至少三天撥打 1.800.660.4287 與 Caltrain 聯絡。
Para traducción lláma al 1.800.660.4287;
如需翻譯，請電 1.800.660.4287。
7/12/24

CNS-3826726#
SING TAO (S.F.)

**ATTACHMENT 7 –
PUBLIC HEARING NOTICE TAKE ONES**

Para solicitar servicio de traducción o interpretación, llame a Caltrain al 1.800.660.4287 al menos tres días antes de la reunión.

**半島走廊聯合監管董事會
PENINSULA CORRIDOR JOINT
POWERS BOARD
公開聽證會公告
車費及車費結構變更提案**

車費及車費結構變更提案

加州鐵路 Caltrain 營運機構半島走廊聯合監管董事會 (PCJPB) 將於 2024 年 7 月 22 日 (星期一) 在 PCJPB 財務委員會會議期間舉行公聽會，聽取大眾對 Caltrain 車費結構變更 (見下文) 提案的意見。

- 青少年單程票價 \$1 (2024 年 9 月 1 日開始可透過所有銷售渠道購買)
- 青少年日票票價 \$2 (2024 年 9 月 1 日開始可透過 Caltrain 車站售票機和流動應用程式購買)
- 青少年月票票價 \$24 (Clipper Next Generation 執行時生效)

公聽會

半島走廊聯合監管董事會 邀請大眾參與公聽會並就可能的變更提供意見。大眾可以透過 Zoom 網站連結和/或電話參加會議。

2024 年 7 月 22 日 (星期一) 下午 2:30 (或在本案項聽證後立即舉行)

Zoom 資訊 : <https://us02web.zoom.us/j/81843266625?pwd=aDExTGltUUJSOUc5TkNnbU1QMTRHUT09>

網路研討會 ID : 818 4326 6625
透過電話參加 : 1.669.444.9171
會議 ID : 818 4326 6625

在聽證會舉行前，大眾可透過郵遞、電郵或電話提出意見：

Board Secretary

**Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA
94070-1306
changes@caltrain.com 1.800.660.4287
(TTY 650.508.6448)**

如需翻譯或口譯協助，請在會議前至少三天撥打 1.800.660.4287 與 Caltrain 聯絡。

Para traducción llame al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.



**PENINSULA CORRIDOR JOINT
POWERS BOARD
PUBLIC HEARING & MEETING
NOTICE**

**PROPOSED FARE AND
FARE STRUCTURE
CHANGES**

Peninsula Corridor Joint Powers Board (PCJPB), which operates Caltrain, will hold a public hearing at the PCJPB Finance Committee meeting on **Monday, July 22, 2024**, to receive public comment to the proposed changes (listed below) to the Caltrain Fare Structure.

- \$1 Youth One-way Fares (available through all distribution channels effective 9/1/24)
- \$2 Youth Day Passes (available through Caltrain station ticket machine and Mobile App effective 9/1/24)



Cần dịch thuật, xin gọi 1.800.660.4287.
Para sa pagsasaling-wika, mangyaring tumawag sa 1.800.660.4287.
번역을 원하시면, 1.800.660.4287번으로 전화하십시오.

- \$24 Youth Monthly Pass (effective upon Clipper Next Generation execution)

Public Hearing

The Peninsula Corridor Joint Powers Board invites public comment on the potential changes at the hearing. The public may participate via a Zoom web link and/or by phone.

Monday, July 22, 2024, at 2:30pm
(or as soon thereafter as the matter may be heard)

Zoom Info: <https://us02web.zoom.us/j/81843266625?pwd=aDExTGltUUJSOUc5TkNnbU1QMTRHUT09>

Webinar ID: 818 4326 6625

Access via Telephone: 1.669.444.9171

Meeting ID: 818 4326 6625

Prior to the hearing, comments may be sent by mail, e-mail, or phone:

Board Secretary

Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA
94070-1306

changes@caltrain.com 1.800.660.4287
(TTY 650.508.6448)

For translation or interpretation assistance, call Caltrain at 1.800.660.4287 at least three days before the meeting.

JUNTA DE PODERES CONJUNTOS DEL CORREDOR DE LA PENÍNSULA AVISO DE AUDIENCIA Y REUNIÓN PÚBLICAS

Cambios Propuestos a las Tarifas de Transporte y su Estructura

El lunes 22 de julio de 2024, la Junta de Poderes Conjuntos del Corredor de la Península (PCJPB), la entidad que opera Caltrain, celebrará una audiencia pública en la reunión del Comité de Finanzas con el fin de recibir comentarios del público sobre los cambios propuestos a la estructura de las tarifas de transporte de Caltrain (los cuales se indican a continuación).

- Tarifas de \$1 para jóvenes en viajes sencillos (disponibles a través de todos los canales de distribución a partir del 1 de septiembre de 2024)
- Pases de un día para jóvenes con una tarifa de \$2 (disponible a través de las máquinas expendedoras de boletos de las estaciones y de la aplicación móvil de Caltrain a partir del 1 de septiembre de 2024)

- Pase mensual para jóvenes con una tarifa de \$24 (a partir de la ejecución de Clipper Next Generation)

Audiencia pública

La Junta de Poderes Conjuntos del Corredor de la Península invita al público a dar sus comentarios sobre estos posibles cambios durante la audiencia. La gente puede participar a través de un enlace web Zoom y/o por teléfono.

Lunes, 22 de julio de 2024 a las 2:30 p.m.
(o tan pronto como el asunto pueda ser considerado)

Información para comunicarse por Zoom: <https://us02web.zoom.us/j/81843266625?pwd=aDExTGltUUJSOUc5TkNnbU1QMTRHUT09>

Identificación del seminario web:
818 4326 6625

Antes de la audiencia, los comentarios pueden enviarse por correo postal, por correo electrónico o por teléfono:

Board Secretary

Peninsula Corridor Joint Powers Board
P.O. Box 3006, San Carlos, CA
94070-1306

changes@caltrain.com 1.800.660.4287
(TTY 650.508.6448)

**ATTACHMENT 8 –
SOCIAL MEDIA POSTS**

Twitter (now X) @Caltrain- Initial Fare Promotions Post (8/25/2023) and Fare Extension Post (3/15/2024)



Coming Friday, September 1st. Caltrain will introduce four new temporary fare products designed to give riders more options to ride while making it easier to save money! Find out more: caltrain.com/fares/promos



2:49 PM · Aug 25, 2023 · 5,121 Views



Discounted fares were extended, take advantage of the Family Day Pass, \$1 Youth Rides, Group Day Pass & 3-Day Pass.

#SFGiants #BayFC



From caltrain.com

8:29 AM · Mar 15, 2024 · 2,398 Views



Facebook @Caltrain- Initial Fare Promotions Post (8/24/2023) and Extension Post (3/4/2024)



Caltrain

Aug 24, 2023 · 🌐

📌 On Friday, September 1, Caltrain will introduce four new temporary fare products designed to give riders more options to ride while making it easier to save money! Read more here: <https://www.caltrain.com/news/caltrain-introduces-new-fare-product-promotions>



👍❤️👎 29

1 comment 7 shares



Caltrain

Mar 4 · 🌐

Did you hear the news?! Our fare promos have been extended! Take advantage and find a promo that works for you <https://www.caltrain.com/fares/promos>.



caltrain.com

New Fares Promotion! | Caltrain

👍❤️ 6

1 share

Instagram @gocaltrain- Fare Promotion Post (9/6/2023)



gocaltrain

Follow



247 likes

gocaltrain The month of September is on its way and we'd like to remind you of our new fall fare promos! This includes a Family Day Pass, Group Day Pass, \$1 Youth Rides, 3 Day Pass, and reduced Parking Rates! More information can be found in the [@gocaltrain](#) link in bio.

September 6, 2023

Twitter (now X) @CaltrainAlerts- Notice of Public hearing on Youth Fare Changes (7/1/2024)

 **Caltrain Alerts** @CaltrainAlerts ⋮

Caltrain to hold Public Hearing on Youth Fare Changes. Info at Caltrain.com/fares More Details, Español, 简体中文) , Tiếng Việt: app.simplifytransit.com/alerts/CaltrainAlerts

5:57 PM · Jul 1, 2024 · 667 Views

**ATTACHMENT 9 –
PRESS RELEASES**

Press Release of New Promotional Products (8/24/2023)



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Rider Information

Projects

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Schedules

Live Map

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Trip Planner

Caltrain Introduces New Fare Product Promotions

08/24/2023

On Friday, September 1, Caltrain will introduce four new temporary **fare products** designed to give riders more options as to how they travel, making it easier to save money by using Caltrain.

The \$1 Youth Pass provides one-way rides for merely a dollar for everyone 18 and under. The Three Day Pass offers passholders unlimited rides for three days immediately upon purchase (including the day of purchase) – a great option for the hybrid commuter working three days during the week.

The Family Day Pass allows two adults and up to four youths (18 and under) to ride together for the cost of two adults and one youth. All Family Day Pass travelers must travel together in the same train car.

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).

The Three Day Pass, Family Day Pass and Group Day Pass can be purchased via the **Caltrain Mobile app** or at a Ticket Vending Machine at a Caltrain station. The \$1 Youth Pass is only available via a **Clipper Youth Card**.

In addition to these fare promotions, Caltrain also is reducing the price of parking at stations by 50%, costing \$2.75 per day starting September 1 or \$41.25 for a monthly parking permit.

Caltrain's ridership continues to increase, with the Average Weekday Ridership currently at approximately 20,000 per weekday. The latest **survey data** show opportunity for even greater growth by modifying prices. By providing a wider range of fare products, Caltrain can better appeal to the needs of potential riders and their changing travel patterns.

Fares were expected to increase this year, but Caltrain implemented a promotional fare discount that will keep fares at their current levels until December 31, 2023.

Caltrain's historic electrification project is the first undertaking in North America in a generation in which diesel trains and their infrastructure components are transitioned to an electrified system. The project will improve the customer experience by increasing the number of trains, modernizing service and adding new safety elements. The new trains, which were **debuted to the public** for the first time in July, will feature on board displays with digital trip information, increased storage capacities, baby-changing tables, Wi-Fi and power outlets at every seat. Electrification will also help meet ambitious regional and state climate action goals by lowering greenhouse gas emissions, improving air quality and relieving traffic congestion. Additionally, electrified service will advance equity along the corridor by reducing noise and air pollution while increasing access for priority equity communities. It will also set the framework for California's future High Speed Rail network that will run on the Caltrain corridor.

###

About Caltrain: Owned and operated by the Peninsula Corridor Joint Powers Board, Caltrain provides rail service from San Francisco to San Jose, with commute service to Gilroy. Serving the region since 1863, Caltrain is the oldest continually operating rail system west of the Mississippi. Looking to the future, Caltrain is set to electrify the corridor by 2024, which will reduce diesel emissions and add more service to more stations while advancing the agency's equity goals.

Follow Caltrain on [Facebook](#) and [X](#).

Free translation assistance is available. Para traducción llama al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

Media Contact: Dan Lieberman, 650.622.2492

Press Release of Public Hearing for Reduced Cost Youth Fares (7/18/2024)



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About Caltrain

Schedules

Live Map

Service Alerts

Trip Planner

Caltrain To Hold Public Hearing on Reduced Cost Youth Fares on July 22

07/18/2024

Discounted youth fares, including \$1 for one-way trips, proven effective at increasing ridership

Caltrain will hold a **public hearing** on the **proposed reduced fare** for youth riders on Monday, July 22. A staff presentation and final action will follow at the Board of Director's meeting on Thursday, August 1.

Caltrain launched four fare promotions in September 2023, with the \$1 one-way youth fare being the most successful at driving ridership increase. During the promotion, the fare only applied to Clipper users, and Clipper youth ticket sales was up 43% year over year, compared to 18% overall ticket sales increase during that period. People who begin riding public transit in their youth are far more likely to continue to use it as adults, making increasing youth ridership vital for Caltrain in the long term.

If adopted, as of Sunday, September 1, a \$1 All Zone One-way Youth fare will be available on all fare payment methods, a \$2 All Zone Day Pass will be available on Caltrain Mobile (while available) and at Caltrain ticket vending machines, and upon the Clipper Next Generation launch, expected in 2025, a \$24 All Zone Monthly pass will be available on to anyone with a Youth Clipper Card.

Caltrain Finance Committee Public Meeting

Monday, July 22, 2024, 2:30 p.m.

Zoom Info: <https://us02web.zoom.us/j/81843266625?pwd=aDExTGhtUUJSOUc5TkNnbU1QMTRHUT09>

Caltrain Board of Directors Public Meeting

Thursday, August 1, 2024, 2 p.m.

<https://us02web.zoom.us/j/87581188408?pwd=OFNUYTVFdExIOXRkR2tQOENXQUhhUT09>

Prior to the hearing, comments may be sent by mail, e-mail or phone:

Board Secretary

Peninsula Corridor Joint Powers Board

P.O. Box 3006, San Carlos, CA 94070-1306

Changes@caltrain.com 1.800.660.4287 (TTY 650.508.6448)

For translation or interpretation assistance, call Caltrain at 1.800.660.4287 at least three days before the meeting.

###

About Caltrain: Owned and operated by the Peninsula Corridor Joint Powers Board, Caltrain provides rail service from San Francisco to San Jose, with commute service to Gilroy. Serving the region since 1863, Caltrain is the oldest continually operating rail system west of the Mississippi. Looking to the future, Caltrain is set to electrify the corridor by 2024, which will reduce diesel emissions and add more service to more stations while advancing the agency's equity goals.

Like us on Facebook at www.caltrain.com and follow on X @Caltrain.

Free translation assistance is available.

Para traducción llame al 1.800.660.4287; 如需翻譯,請電 1.800.660.4287.

**ATTACHMENT 10 –
PUBLIC HEARING PRESENTATION**

2024 Fare Change Recommendations - Youth Fare Discounts

Public Hearing at the Finance Committee Presentation

July 22, 2024



Agenda



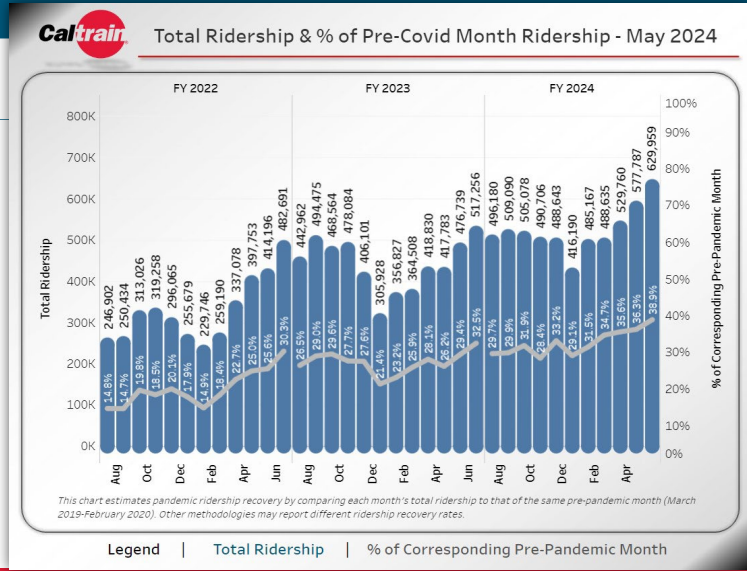
- Context
- Youth Fare Structure Change Recommendations
- Financial Investment Analysis
- Fare Policy Impacts
- Title VI Analysis
- Next Steps
- Questions / Feedback



2

Context

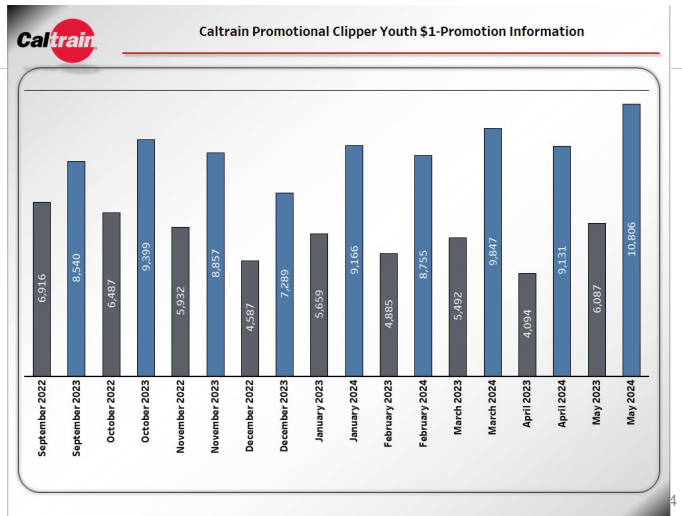
- While Caltrain’s ridership is increasing steadily, it remains lower amidst changed travel behavior stemming from the pandemic.
- May 2023 vs May 2024: 32% increase
- Pre-pandemic comparison: May ridership 39% of Pre-Pandemic Ridership



Promotional Fares

Sept 2023, four promotional products were introduced to help increase ridership

- \$1 youth fares (Most successful)
- 3-day pass
- Family day pass
- Group day pass



Youth Fare Results

Youth clipper ticket sales increased 43% year over year

Overall ticket sales increased 18% during the same period



5

Fare Structure Change Recommendations

Provide expanded permanent youth discounted fare

- \$1 All Zone One-way Youth fares available on all platforms (9/1/24)
- \$2 All Zone Day Pass available on TVM's (9/1/24) and Mobile App (while available) for Youth riders
- \$24 All Zone Monthly Pass available on Youth Clipper Card (upon Clipper Next Generation Execution)

Benefits

- Focused strategy to build a pipeline for future Caltrain ridership
- Opportunities for increased youth and family ticket sales
- Easier for customers to understand
- Purchase options with no barrier to entry

6

Financial Investment Analysis

Short -Term Annual Investment Amount

- Estimated reduction in fare revenue based on 2024 historical data assuming all prior riders paid the new youth fares
- Expected incremental revenue range is driven by:
 - New youth riders and increases in existing youth rider frequency (assumed 15%-25% increase in youth sales)
 - Companion adults riding with youth (assumed ride with youth every 1 to 2 trips)

Short Term Annual Investment Estimate	
Estimated Reduction in Fare Revenue	\$750K
Expected Incremental Revenue Range	\$220-\$650k
Short Term Investment Range	\$100k-\$530k



7

Caltrain Fare Policy Goals

Financial Sustainability - ensure financial health

- Annual investment of \$100K-\$530, potential near and long-term offsets/benefits

Equity - participate programs that promote affordable transit

- Makes youth ridership much more affordable

Customer Experience – ease of use and predictable fare changes

- Easy to understand and no barriers to purchase

Ridership - maximize use of agency's assets

- Promotes current and future ridership growth and frequency

8

Title VI Equity Analysis

Disparate Impact (DI) & Disproportionate Burden (DB) Policies

- A threshold for determining when adverse effects of fare changes are borne disproportionately by **minority vs. non-minority** populations (DI) or **low-income vs. non-low-income** populations (DB)

Caltrain's DI & DB thresholds are set at 10%

- There is a Disparate Impact (DI) finding if the difference in impacts borne by minority populations compared to those borne by non-minority populations are greater than 10%

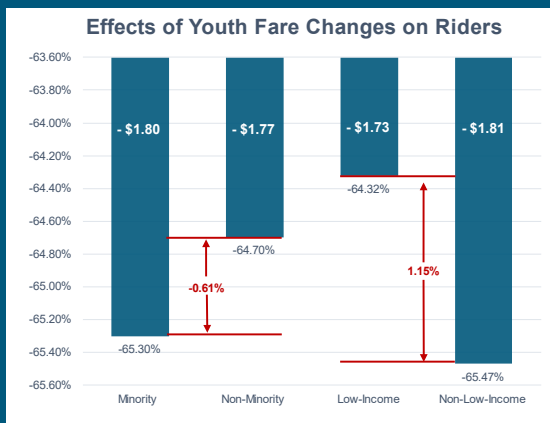
OR

- There is a Disproportionate Burden (DB) finding if the difference in impacts borne by low-income populations compared to those borne by non-low-income populations are greater than 10%



9

No Disparate Impact or Disproportionate Burden



Data Used

- 2023 Systemwide Ridership
- 2022 Caltrain Triennial Customer Survey
- Current and Proposed Youth Fare Structure

Findings

- Minority vs. Non-Minority % Difference:
 - **-0.61% (No Disparate Impact, within 10%)**
 - Both Minority and Non-Minority populations benefit from the proposed youth fares
- Low-Income vs. Non-Low-Income % Difference:
 - **1.15% (No Disproportionate Burden, within 10%)**
 - Both Low-Income and Non-Low-Income populations benefit from the proposed youth fares



10

Feedback and Next Steps

CAC Presentation (June) and multiple avenues for public feedback

- Positive public response

Today

- Conduct public hearing
- Recommendation from Finance Committee

Upcoming

- Full Board Approval (August)

11

Action

Staff recommends that the JPB adopt two updated Fare Structures

Pre-Clipper Next Generation Fare Structure - Effective 9/1/2024:

- Implement a \$1 All Zone One-way fare available on all platforms.
- Introduce a \$2 All Zone Day Pass available on Ticket Vending Machines (TVMs) and Mobile App (while available).

Post-Clipper Next Generation Fare Structure - Effective upon Clipper Next Generation Execution:

- Implement a \$24 All Zone Monthly Pass available on Youth Clipper Card.



1
2

**ATTACHMENT 11 –
PUBLIC COMMENTS**

Public Reply to a Caltrain post about the Fare promotions from user @TransbayC on Twitter (now X)



Caltrain
@Caltrain



Headed to see #SFGiants 🏈 this weekend? Don't forget our discounted fares:

Friends & Family Passes and \$1 Youth Rides!



From caltrain.com

12:44 PM · Apr 3, 2024 · 2,044 Views



Reply



Transbay Coalition @TransbayC · Apr 3



That's a great deal



Public Comment Matrix

#	Comment	Speaker	Public Meeting/ Hearing	Date
1	Jeff Carter made comments regarding fare changes during this portion of the meeting	Jeff Carter	Public Meeting – Citizens Advisory Committee	6/19/2024

**ATTACHMENT 12 – CALTRAIN BOARD APPROVAL OF
ADOPTION OF YOUTH FARE STRUCTURE AND TITLE VI
EQUITY ANALYSIS**

Resolution No. 2024-

**Board of Directors, Peninsula Corridor Joint Powers Board
State of California**

* * *

Adopt Proposed Fare Structure Changes

Whereas, Caltrain introduced four promotional products in September 2023 to provide enhanced value and promote additional ridership: the 3-Day Pass, Family Day Pass, Group Day Pass, and the \$1 All Zone One-way Youth fare; and

Whereas, while the 3-Day Pass, Family Day Pass, Group Day Pass saw modest adoption, \$1 All Zone One-way Youth fare resulted in a 43% year-over-year increase in Youth Clipper utilization compared to overall ticket sales growth of 18%; and

Whereas, to build on this success and promote further ridership increases, staff recommends providing an expanded permanent discounted fare program for Youth, and has presented two Fare Structures to the Board for adoption, one to take effect on September 1, 2024 (Pre-Clipper Next Generation Fare Structure, Attachment 1), and the other to take effect upon execution of Clipper Next Generation (Post-Clipper Next Generation Fare Structure, Attachment 2); and

Whereas, this program will provide Youth the opportunity to purchase upon Board adoption \$1 one-way fares through Caltrain TVMs, Caltrain Mobile, and Youth Clipper cards, and \$2 day passes at TVMs and Caltrain mobile. Moreover, \$24 monthly passes on Youth Clipper cards will become available to Youth upon Clipper Next Generation execution; and

Whereas, this expanded program has multiple purchase options in an effort to make youth ridership much more affordable, easy to understand, and more accessible, and to promote current and future ridership growth and frequency; and

Whereas, staff presented the recommended Youth fare changes to the Caltrain Citizens Advisory Committee (CAC) on June 19, 2024, and a public hearing was held on July 22, 2024, as required by law; and

Whereas, under Title VI of the Civil Rights Act of 1964, Caltrain is required to perform a Title VI Equity Analysis in conjunction with fare changes to assess whether they will result in disparate impacts or disproportionate burdens on minority and low-income populations; and

Whereas, there is no finding of disparate impact or disproportionate burden on minority and low-income youth populations, given the benefits of the proposed fare program; and

Whereas, analysis of 2024 historical data shows the implementation of this Youth fares program could reduce fare revenue by up to \$750,000. However, it is likely that the price reductions could incentivize incremental ridership by both youth and families and frequency of ridership, which can potentially increase fare revenue.

Now, Therefore, Be It Resolved that the Board of Directors of the Peninsula Corridor Joint Powers Board hereby adopts the two recommended Fare Structures (Attachments 1 &2) to be effective on the following dates and making the following changes:

1. Pre-Clipper Next Generation Fare Structure - Effective 9/1/2024:
 - Implementing a \$1 All Zone One-way Youth fare available on all platforms; and
 - Introducing a \$2 All Zone Youth Day Pass available on Ticket Vending Machines (TVMs) and Mobile App (while available).
2. Post-Clipper Next Generation Fare Structure - Effective upon Clipper Next Generation Execution:
 - Implementing a \$24 All Zone Youth Monthly Pass available on Youth Clipper Card.

Regularly passed and adopted this 1st day of August 2024 by the following vote:

Ayes:

Noes:

Absent:

Chair, Peninsula Corridor Joint Powers Board

Attest:

JPB Secretary