

Caltrain Business Plan

COVID RECOVERY PLANNING

Bicycle and Active Transportation
Advisory Committee
September 13, 2021



Ongoing Recovery Planning Efforts

Caltrain has pivoted its Business Plan effort to focus on COVID-19 Recovery planning. This work is spread across multiple streams as shown on the right

Caltrain staff will engage regularly with the Board, stakeholders and the public as recovery planning proceeds



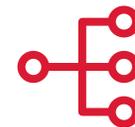
Equity, Connectivity, Recovery, & Growth Framework



Near Term Service Planning



Financial Analysis



Scenario Planning

Caltrain Service - Multiple Phases of Crisis & Response

Initial Triage

March 2020 – May 2020

Surviving the Pandemic

May 2020 – Summer 2021

Preparing for the Next Reality

Fall 2021 and Beyond



- Service cut to 42 trains per day during initial shelter-in-place order.

- Service restored to 68 trains per day.
- After board adoption of Equity, Connectivity, Recovery, and Growth Policy, service increased to 70 trains per day with a focus on off-peak service and BART connections.

- Opportunity to rebuild service to capture post-pandemic markets and build upon ECRG policy.

Equity, Connectivity, Recovery, and Growth Policy

Adopted Fall 2020 (full policy at www.caltrain.com)



Equity

Undertake service changes in a manner that enhances equity and access for historically disadvantaged and underserved groups and communities.



Connectivity

Plan for a standardized schedule with consistent station arrivals so that transit providers can coordinate with Caltrain's service.

Prioritize coordination of major intermodal transfers within service planning, focusing on the connection to BART at Millbrae



Recovery & Growth

Strive to deliver specific elements and benefits of the Long Range Service Vision as soon as practical and supported by market demand and financial circumstances of the railroad.

Service Planning

Ongoing Recovery Planning Efforts

Caltrain has pivoted its Business Plan effort to focus on COVID-19 Recovery planning. This work is spread across multiple streams as shown on the right

Caltrain staff will engage regularly with the Board, stakeholders and the public as recovery planning proceeds over the next several months



Equity, Connectivity, Recovery, & Growth Framework



Near Term Service Planning



Financial Analysis



Scenario Planning

Pre-Pandemic Caltrain Service



Caltrain's pre-pandemic service amplified its most successful markets, but restricted greater diversity of riders and travel behavior.



Highly tailored to pre-COVID office schedules



20 different stopping patterns



Inconsistent BART connections



Infrequent midday and evening service

Northbound - WEEKDAY SERVICE to SAN FRANCISCO

100 Local 200 Limited 300 Baby Bullet

Train No.	101	103	305	207	309	211	313	215	217	319	221	323	225	227	329	231	233	135	237	139	143	NORTHBOUND	147	151	155	
Gilroy									6:06		6:28											AM				
San Martin									6:15		6:37															
Morgan Hill									6:21		6:43															
Blossom Hill									6:36		6:58															
Capitol									6:42		7:04															
Tamien	4:55		5:51	5:56					6:50	6:56	7:15			7:53	7:59		8:28									
San Jose Diridon	4:28	5:03	5:45	5:59	6:04	6:23	6:49	6:54	6:59	7:04	7:23	7:49	7:54	7:59	8:04	8:23	8:39	9:13	9:50	10:13	10:13					
College Park																										
Santa Clara	4:33	5:08		6:06		6:28			7:06		7:28			8:08		8:28	8:44	9:18	9:55	10:18	10:18					
Lawrence	4:39	5:13		6:12					7:12		7:34			8:15			8:50	9:24	10:00	10:24	10:24					
Sunnyvale	4:43	5:18		6:20	6:15	6:36		7:07	7:20	7:15	7:40		8:07	8:22	8:15	8:36	8:55	9:29	10:05	10:28	10:28					
Mountain View	4:48	5:23		6:01	6:25	6:42	7:05	7:12	7:25	7:20	7:46	8:05	8:12	8:28		8:42	9:00	9:34	10:10	10:33	10:33					
San Antonio	4:52	5:27		6:29					7:29					8:32			9:04	9:38	10:14	10:37	10:37					
California Avenue	4:57	5:31		6:34		6:48		7:18	7:34		7:51		8:18	8:36			9:09	9:42	10:18	10:42	10:42					
Palo Alto	5:01	5:36		6:09	6:38	6:27		7:13	7:22	7:38	7:28		8:13	8:22	8:41	8:28		9:14	9:47	10:23	10:47	10:47				
Menlo Park	5:04	5:39		6:41		6:54		7:41		7:56			8:44		8:51	9:17	9:50	10:26	10:50	11:49	11:49					
Redwood City	5:10	5:44		6:47	6:33	6:59		7:47	7:35	8:02			8:51	8:35	8:57	9:24	9:57	10:32	10:55	11:55	11:55					
San Carlos	5:15	5:49				7:04		7:30		8:07			8:30			9:02	9:28	10:01	10:37	10:59	11:59					
Belmont	5:18	5:52				7:07				8:10						9:05	9:32	10:05	10:40	11:03	12:03					
Hillsdale	5:22	5:56	6:19	6:54		7:11	7:24	7:35	7:54		8:14	8:25	8:35	8:59		9:09	9:35	10:08	10:44	11:06	12:06					
Hayward Park	5:25	5:59				7:14				8:17						9:12		10:11		11:09	12:09					
San Mateo	5:28	6:03			6:44	7:18		7:39		7:45	8:21		8:39		8:45	9:15	9:40	10:15	10:49	11:12	12:12					
Burlingame	5:32	6:06				7:21		7:44		8:24			8:44			9:19	9:43	10:18	10:52	11:15	12:15					
Millbrae	5:36	6:11	6:28	7:03	6:52	7:26	7:32		8:03	7:53	8:29	8:34		9:08	8:53	9:24	9:48	10:23	10:57	11:20	12:20					
San Bruno	5:41	6:16				7:30		7:51		8:33			8:51			9:28	9:53	10:28	11:02	11:25	12:25					
So. San Francisco	5:45	6:20		7:09		7:34			8:09		8:37			9:14		9:32		10:32		11:29	12:29					
Bayshore	5:51	6:26				7:41+				8:45+						9:39		10:38		11:35	12:35					
22nd Street	5:57	6:32				7:50+				8:53+						9:45		10:44		11:41	12:41					
San Francisco	6:03	6:38	6:47	7:24	7:09	7:57	7:52	8:08	8:24	8:13	9:00	8:54	9:08	9:29	9:13	9:52	10:09	10:52	11:19	11:48	12:48					



Post-Pandemic Uncertainty

There is substantial uncertainty around post-pandemic travel behavior, especially when and how regular commuting patterns will return. Caltrain travel patterns could look substantially different than before the pandemic, given that many tech companies may shift to regular remote or flexible work schedules. A post-pandemic Caltrain service will need to be diverse and adapt to changing corridor needs while also capturing new markets.

Tracking Data & Trends to Inform Service Planning

- Pre-Pandemic Ridership Patterns & Surveys
- Pandemic Ridership & Feedback
- Vaccinations & Variants
- Go Pass Participation
- University Reopening Plans (Stanford, Santa Clara, San Jose State, UCSF, etc.)
- Gas Prices
- Travel Behavior Trends (Office Reopenings & Remote/Flexible Work Schedules)
- Economic Trends (Office Vacancies, Unemployment Rates, & Development Activity)
- Freeway Congestion
- Restoring Special Events (Giants, Warriors, Sharks, etc.)

Background Analysis: Market Research

Results of the 2021 Bay Area Council Poll (April 13):

- 34% of respondents currently employed don't plan to travel to a workplace as often as they did before the pandemic hit.
- Just 38% said they will resume commuting to their workplace five days a week.
- 53% of those in a variety of professional services and technology jobs said they plan to work in the office less frequently after the pandemic than they did before.

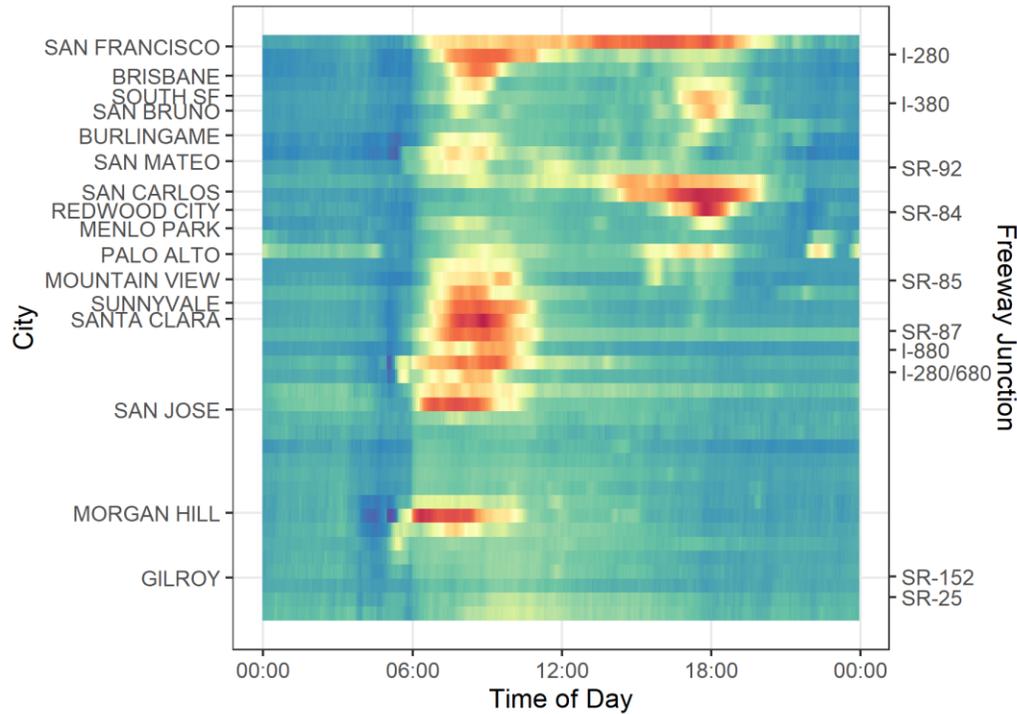
City and County of SF Office of the Controller Report:

“Status of the Re-Opening of the SF Economy: June 2021”

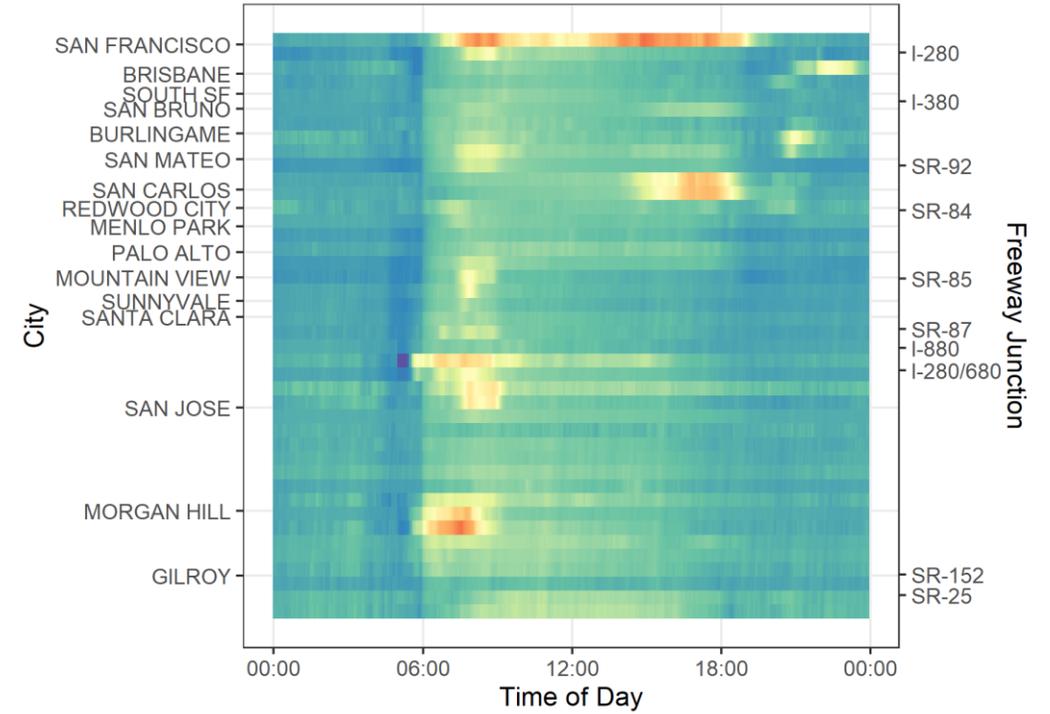
- The five-county San Francisco metro area continues to lag comparable metro areas in office attendance
 - Still below 20%, which is lower than New York, L.A., and Austin
- Despite improvements in the public health situation, the rate of small business closures remained steady from March to early June.
 - More than 45% of small businesses in the city remain closed.
- Employment in the San Francisco Metro Division is recovering slowly.
 - Total employment is still down 10% from pre-pandemic level and has not yet recovered to the level reached before the second wave of COVID-19 infections at the end of last year.

Background Analysis: Freeway Speed Comparison (Pre- vs. Post-Pandemic)

US-101 Mid-Week NB Traffic Speeds, Jun 2019

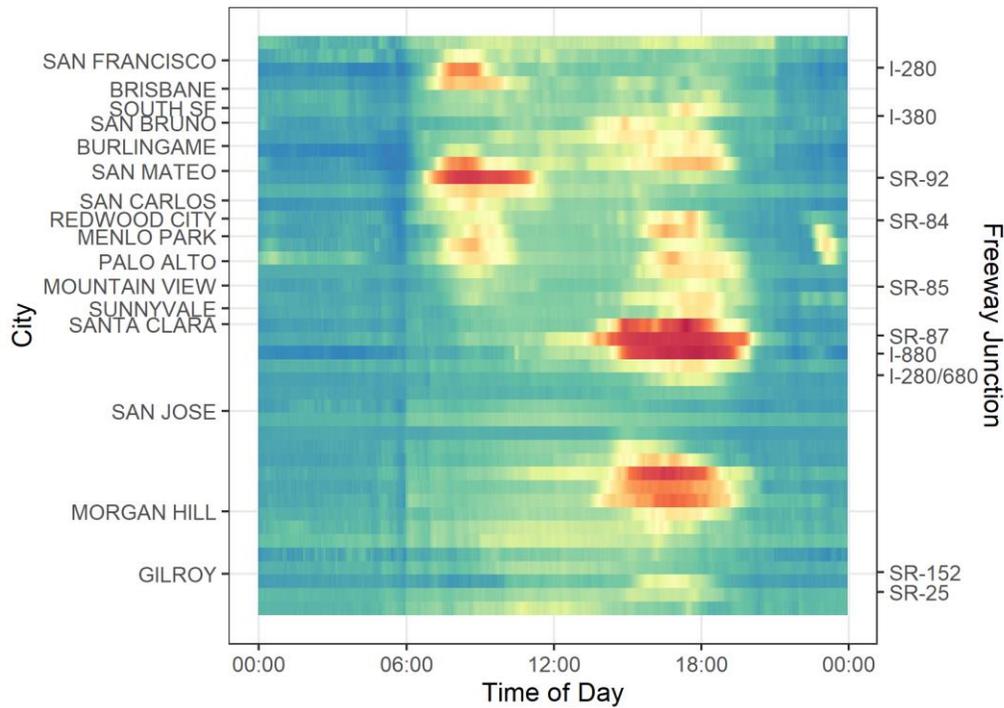


US-101 Mid-Week NB Traffic Speeds, Jun 2021

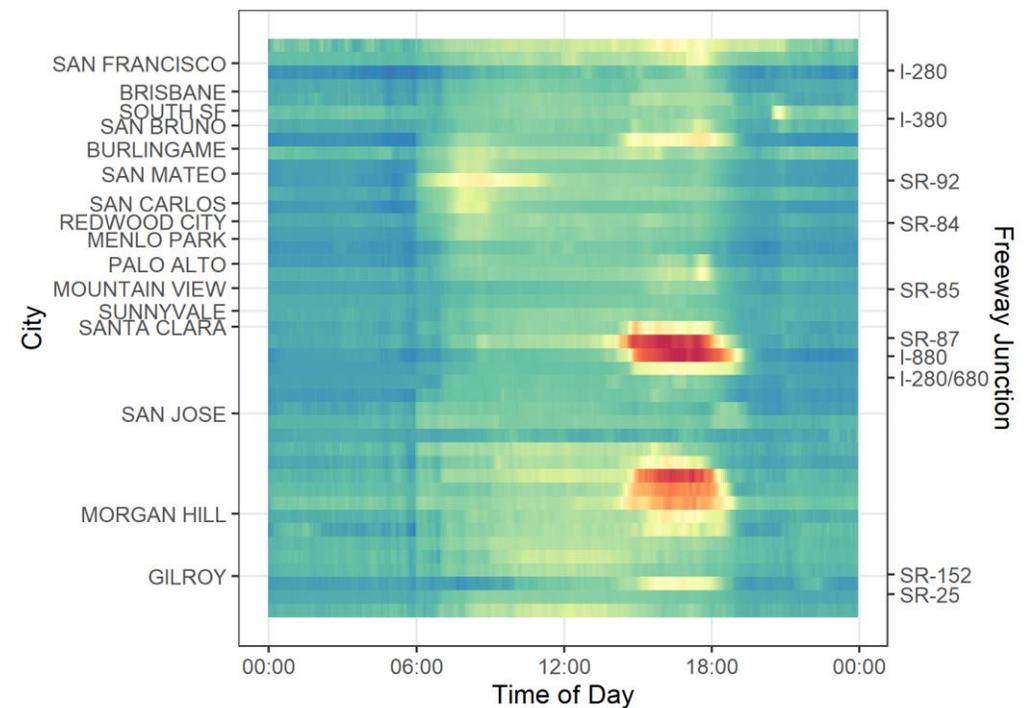


Background Analysis: Freeway Speed Comparison (Pre- vs. Post-Pandemic)

US-101 Mid-Week SB Traffic Speeds, Jun 2019



US-101 Mid-Week SB Traffic Speeds, Jun 2021



Background Analysis: What are other railroads doing?

- **Metra (Chicago):**

New pilot schedules will start July 12 on the UP North, BNSF and Metra Electric lines and July 19 on the Rock Island Line. In response to riders' evolving needs and global best practices, the pilot schedules step away from pre-pandemic schedules that prioritized peak rush-hour service in favor of a more balanced approach that spreads out the service to offer better off-peak options. The schedules also have been reimagined with more memorable timetables and service patterns.

- **MBTA (Boston):**

Over the last year, though Commuter Rail ridership has remained low overall, midday trains retained a higher percentage of their ridership than the traditional AM and PM peak trains with ridership more evenly distributed throughout the day. Recognizing that commuting needs have changed and will continue to evolve, the MBTA and Keolis have developed a Regional Rail style of service that offers more options to returning pre-pandemic commuters as well as new riders who may not have considered the service previously.

Service Planning Strategy



**Match Flexibility of Future
Workplace & Recapture
Commuter Market**



**Address Systemic
Inequities of Caltrain
Service**



**Build New
Ridership Markets**

1. Match Flexibility of Future Workplace & Recapture Commuter Market

Key Findings

Uncertainty

Most office-based employers do not have a clear picture of the post-pandemic “new normal” – employer policies and employee preferences continue to evolve

Evolution Over Time

It may take months or years for clear trends to emerge and a new normal to be established. Caltrain will need to monitor and adapt to new travel behavior.

Greater Flexibility

Increased work from home and flexible work hours are expected, but will vary widely by employer:

- Universities, life sciences, logistics, and hospitality/services more likely to be in person all or most of the time
- Offices (especially tech) more likely to have a remote work option, but adoption will be different between employers



2. Address Systemic Inequities of Caltrain Service

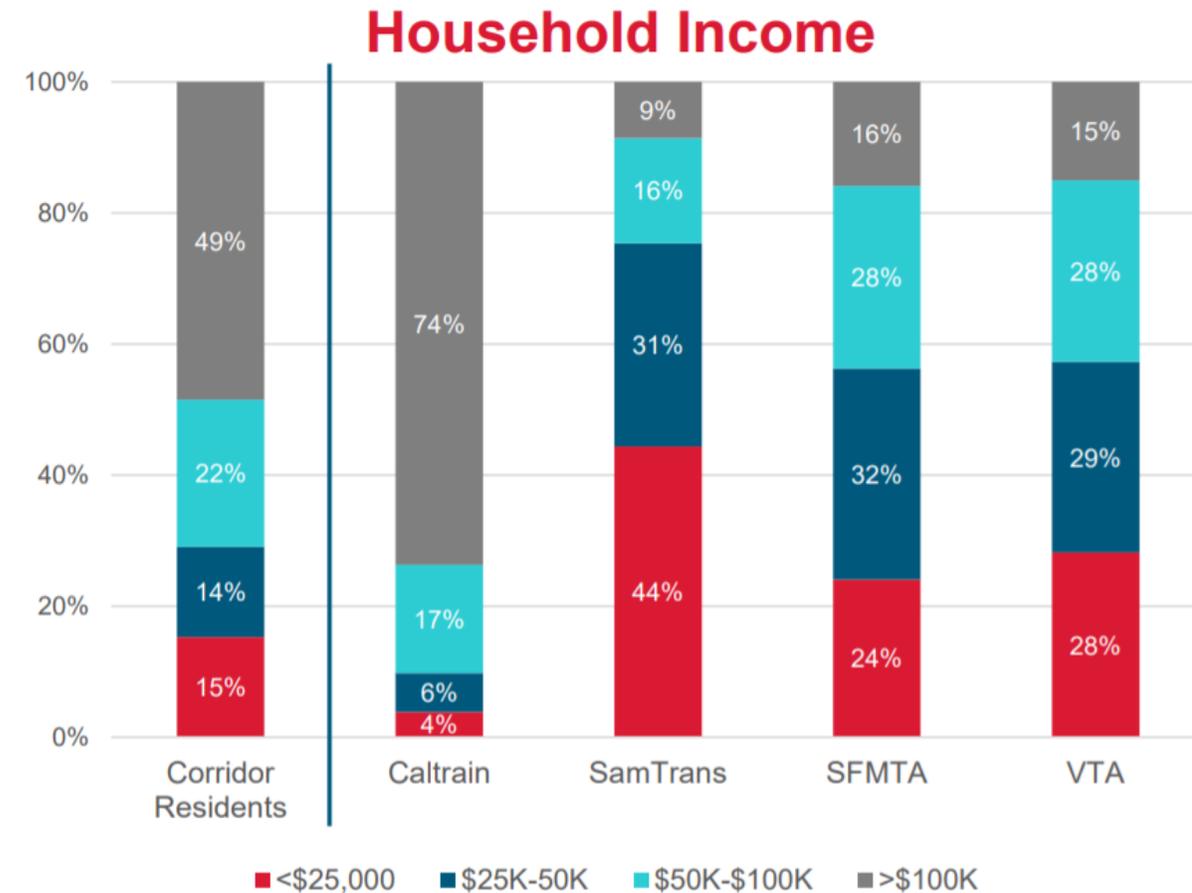
Key Findings

Schedule-Imposed Barriers

Prior to the pandemic, Caltrain's highly-customized schedule posed barriers for off-peak/ weekend trips, intermodal transfers, and "novice" riders.

Disproportionate Outcomes

Schedule-imposed barriers particularly affected people who are transit-reliant or work nontraditional schedules – populations that are disproportionately lower income and people of color



3. Build New Ridership Markets

Key Findings

Latent Demand & Development Activity

Prior to the pandemic, Caltrain experienced significant latent demand due to low frequencies and limited connectivity for many stations. Construction activity along the corridor remains strong, and recently-completed developments provide potential for new ridership growth.

Special Events & Non-Commute Trips

Recent ridership data show that the traditional Giants game market is rebounding quickly, and Caltrain has an opportunity to better serve Warriors and Sharks games, concerts and special events, airport travel, medical appointments, and other non-commute trips – especially during evenings and weekends.



Service Planning Strategy

Strategies

Match Flexibility of Future Workplace & Recapture Commuter Market

Address Systemic Inequities of Caltrain Service

Build New Ridership Markets

Approach

Competitive Service

Restore Baby Bullet and zone express service to recapture riders adjusting to new travel behavior

Simple Service

Simplify structure while expanding train options and frequency at as many stations as possible

All-Day Service

Maintain expanded midday, evening, and weekend service to broaden Caltrain's reach

Coordinated Service

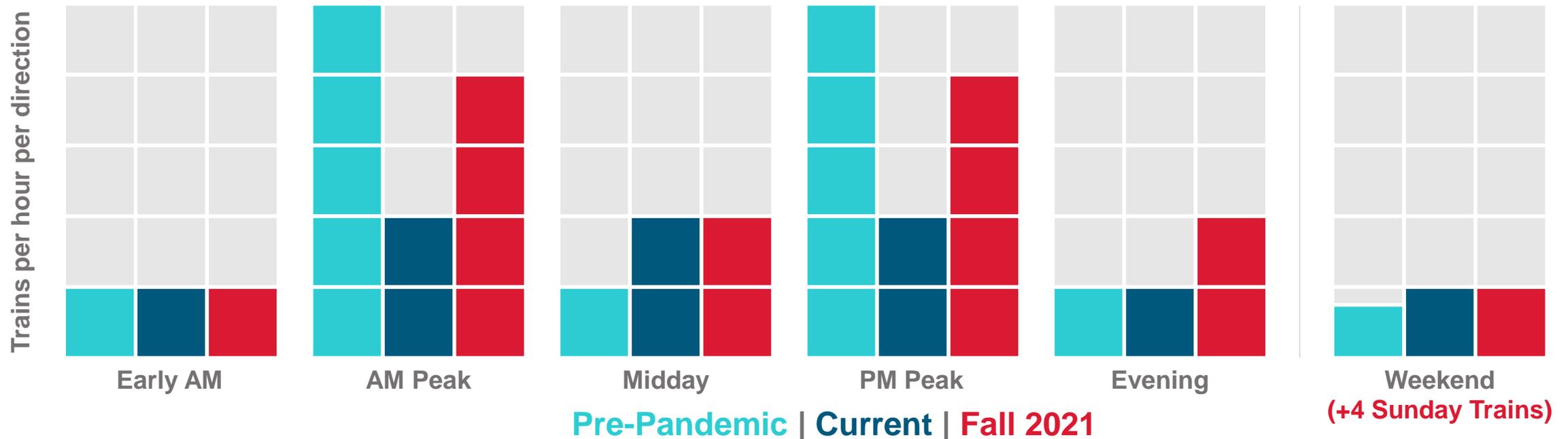
Coordinate connections with BART and other operators

Optimized Service

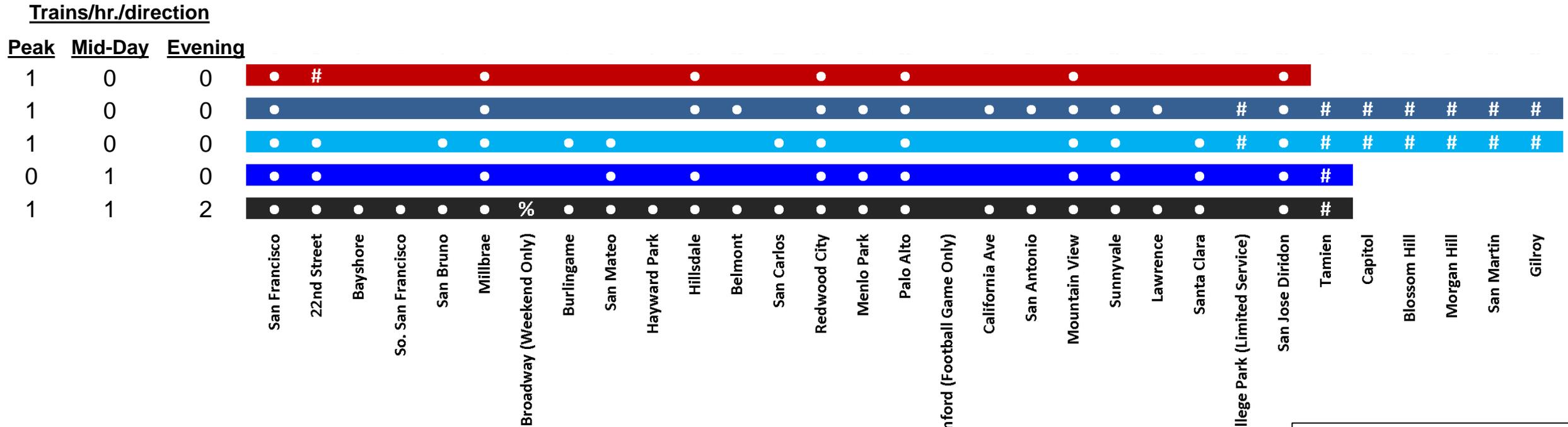
Adjust stopping patterns to serve latent demand and growing station areas

August 2021 Service Expansion

The August 2021 service plan focuses on expanding peak period and evening frequency as well as adjusting stopping patterns. Overall weekday span of service will not change. Sunday service will be expanded to match Saturday Service.



August 2021 Service Plan (Weekdays)



Legend:
 ● - Regular Stops
 % - Weekend Only Stops
 # - Limited Service (Some trains stop at the station)

Key Peak Hour Metrics: AM Peak Trains per Hour by Station Pair

From Origin Station to Destination Station	San Francisco	22nd Street	Bayshore	South San Francisco	San Bruno	Millbrae	Burlingame	San Mateo	Hayward Park	Hillsdale	Belmont	San Carlos	Redwood City	Menlo Park	Palo Alto	California Avenue	San Antonio	Mountain View	Sunnyvale	Lawrence	Santa Clara	San Jose Diridon	Tamien
San Francisco		3	1	1	2	4	2	2	1	3	2	2	4	2	4	2	2	4	3	2	2	4	1
22nd Street	2		1	1	2	3	2	2	1	2	1	2	3	1	3	1	1	3	2	1	2	3	1
Bayshore	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
South San Francisco	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
San Bruno	2	2	1	1		2	2	2	1	1	1	2	2	1	2	1	1	2	2	1	2	2	1
Millbrae	4	2	1	1	2		2	2	1	3	2	2	4	2	4	2	2	4	3	2	2	4	1
Burlingame	2	2	1	1	2	2		2	1	1	1	2	2	1	2	1	1	2	2	1	2	2	1
San Mateo	2	2	1	1	2	2	2		1	1	1	2	2	1	2	1	1	2	2	1	2	2	1
Hayward Park	1	1	1	1	1	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1
Hillsdale	3	1	1	1	1	3	1	1	1		2	1	3	2	3	2	2	3	2	2	1	3	1
Belmont	2	1	1	1	1	2	1	1	1	2		1	2	2	2	2	2	2	2	2	1	2	1
San Carlos	2	2	1	1	2	2	2	2	1	1	1		2	1	2	1	1	2	2	1	2	2	1
Redwood City	4	2	1	1	2	4	2	2	1	3	2	2		2	4	2	2	4	3	2	2	4	1
Menlo Park	2	1	1	1	1	2	1	1	1	2	2	1	2		2	2	2	2	2	2	1	2	1
Palo Alto	4	2	1	1	2	4	2	2	1	3	2	2	4	2		2	2	4	3	2	2	4	1
California Avenue	2	1	1	1	1	2	1	1	2	2	2	1	2	2	2		2	2	2	2	1	2	1
San Antonio	2	1	1	1	1	2	1	1	2	2	2	1	2	2	2	2		2	2	2	1	2	1
Mountain View	4	2	1	1	2	4	2	2	1	3	2	2	4	2	4	2	2		3	2	2	4	1
Sunnyvale	3	2	1	1	2	3	2	2	1	2	2	3	2	3	2	3	2	3		2	2	3	1
Lawrence	2	1	1	1	1	2	1	1	1	2	2	1	2	2	2	2	2	2	2		1	2	1
Santa Clara	2	2	1	1	2	2	2	2	1	1	1	2	2	1	2	1	1	2	2	1		2	1
San Jose Diridon	4	2	1	1	2	4	2	2	1	3	2	2	4	2	4	2	2	4	3	2	2		1
Tamien	2	1	1	1	1	2	1	1	1	2	2	1	2	2	2	2	2	2	2	2	1	2	

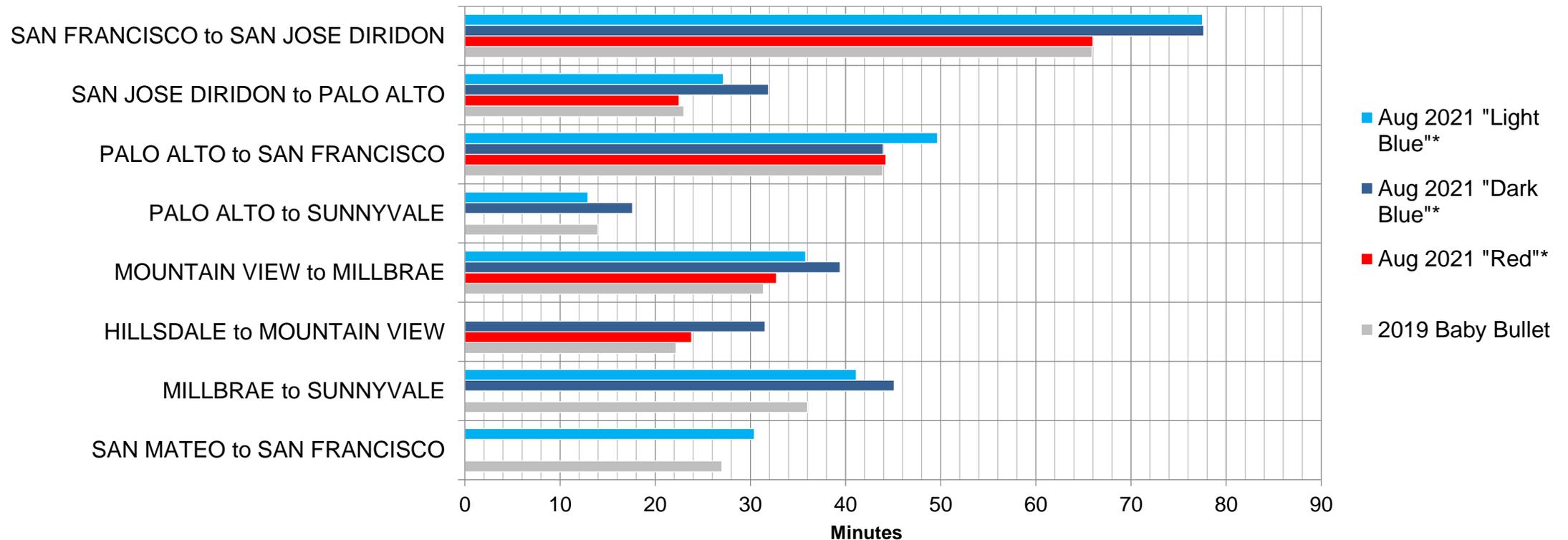
August 30, 2021

From Origin Station to Destination Station	San Francisco	22nd Street	Bayshore	South San Francisco	San Bruno	Millbrae	Burlingame	San Mateo	Hayward Park	Hillsdale	Belmont	San Carlos	Redwood City	Menlo Park	Palo Alto	California Avenue	San Antonio	Mountain View	Sunnyvale	Lawrence	Santa Clara	San Jose Diridon	Tamien
San Francisco		5	1	1	1	5	2	3	1	3	1	3	5	3	5	2	1	4	1	2	5	1	
22nd Street	1		1	1	1	5	2	3	1	3	1	3	5	3	5	2	1	4	1	2	5	1	
Bayshore	1	1		1	1	1	1	1	1	1	1	1	1	0	1	0	0	0	0	0	1	1	0
South San Francisco	2	1	1		1	1	1	1	1	1	1	1	1	0	1	0	0	0	0	0	1	1	0
San Bruno	2	1	1	1		1	1	1	1	1	1	1	1	0	1	0	0	0	0	0	1	1	0
Millbrae	4	1	1	2	1		2	3	1	3	1	3	5	3	5	2	1	4	1	2	2	5	1
Burlingame	2	1	1	1	2	1		2	1	2	1	2	2	1	2	1	1	2	2	1	2	0	
San Mateo	3	1	1	1	2	2	2		1	2	1	3	3	2	3	1	0	0	0	0	1	1	0
Hayward Park	1	1	1	1	1	1	1	1		1	1	1	1	0	1	0	0	0	0	0	1	1	0
Hillsdale	4	1	1	2	2	3	2	2	1		1	2	3	1	3	1	0	2	0	1	1	3	0
Belmont	1	1	1	1	1	1	1	1	1	1		1	1	0	1	0	0	0	0	0	1	1	0
San Carlos	2	1	1	1	2	1	2	2	1	2	1		3	2	3	2	1	2	1	2	2	3	0
Redwood City	3	1	1	2	1	3	1	2	1	2	1	1		3	5	2	1	4	1	2	2	5	1
Menlo Park	2	1	1	2	1	2	1	1	1	2	1	1	2		3	2	1	3	1	2	1	3	1
Palo Alto	4	0	0	1	1	3	1	2	0	3	0	1	2	1		2	1	4	1	2	2	5	1
California Avenue	3	1	1	2	2	3	2	1	3	1	2	2	2	2	2		1	2	1	2	1	2	0
San Antonio	1	0	0	1	0	1	0	0	1	0	0	0	1	1	1	1		1	1	1	1	1	0
Mountain View	4	1	1	2	2	3	2	2	1	4	1	2	2	2	3	3	1		1	2	1	4	1
Sunnyvale	4	1	1	2	2	3	2	3	1	3	1	3	1	2	3	3	1	3		1	1	1	0
Lawrence	1	0	0	1	0	1	0	0	0	1	0	0	1	1	1	1	1	1	1		1	2	0
Santa Clara	2	1	1	2	1	2	1	1	1	2	1	1	2	2	1	2	1	2	2	1		2	0
San Jose Diridon	5	1	1	2	2	4	2	3	1	4	1	2	3	2	4	3	1	4	3	1	2		1
Tamien	2	0	0	1	0	2	0	1	0	1	0	0	2	1	2	1	1	1	2	1	1	2	

October 7, 2019

Key Travel Time Metrics (Peak Period)

Trip Time Comparison 2019 vs. August 2021 Proposed (Average by Type)



Note: August 2021 train type names are just placeholders and refer to the color of lines in the diagram on Page 20. Actual names and colors are still under development.

Ongoing Constraints

Caltrain's primary goal of the fall schedule change is to increase service. Still, the railroad must continue to operate within significant schedule constraints, including:



Financial Constraints

- Farebox revenue remains low and will take time to recover
- Service levels must be aligned with financial capacity



Major Construction Projects

- South San Francisco and Electrification projects require track access to complete
- Train schedules must be tailored to accommodate ongoing single-tracking operations



Staffing

- Service reductions during the pandemic were achieved through attrition (retirements)
- Replenishing through hiring and training will take months.

Overall Benefits

The new Caltrain schedule will attract both former and prospective customers by providing:

- One-seat ride between all station pairs, all day long
- Competitive peak-period trip time in more station pairs
- Faster service during midday periods
- More frequent evening service for special events
 - *New Sunday evening trains will provide service from Chase and SAP Centers*

Scalable to adjust to emerging ridership patterns

Provides adequate connections with BART at Millbrae

Accommodates construction activities during off peak hours



Future Considerations

- **Collaborate with BART to improve Evening and Sunday Millbrae Connections**
- **Schedule is designed to allow for the addition of a 5th train per hour (second Baby Bullet) during peak periods when demand increases**
- **Increasing work windows to accelerate upcoming construction work for PCEP**

Scenario Planning

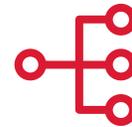
Ongoing Recovery Planning Efforts



Equity, Connectivity, Recovery,
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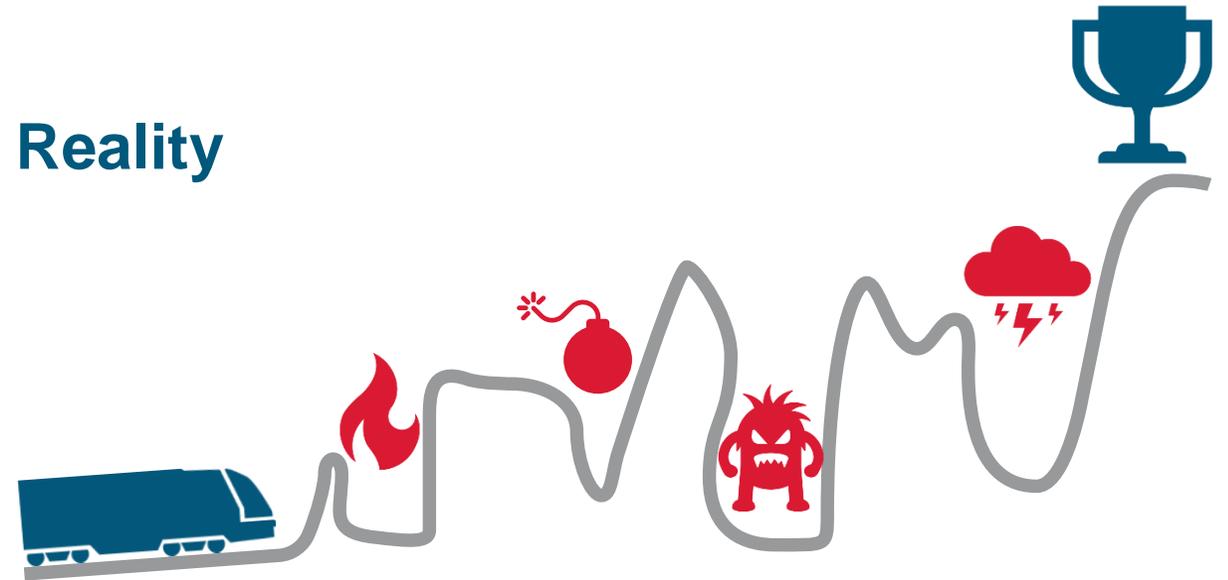
Why did Caltrain Undertake Scenario Planning?

The events surrounding the COVID-19 Pandemic have massively changed Caltrain's business and have also provoked larger, long term shifts in the railroad's surrounding business environment. The "next reality" Caltrain faces looks increasingly volatile, uncertain, complex and ambiguous. Previous trends and assumptions are not necessarily a reliable guide to what may happen next

The Plan



Reality



Caltrain's Focal Question:

What's the impact of the pandemic on Caltrain's future business?

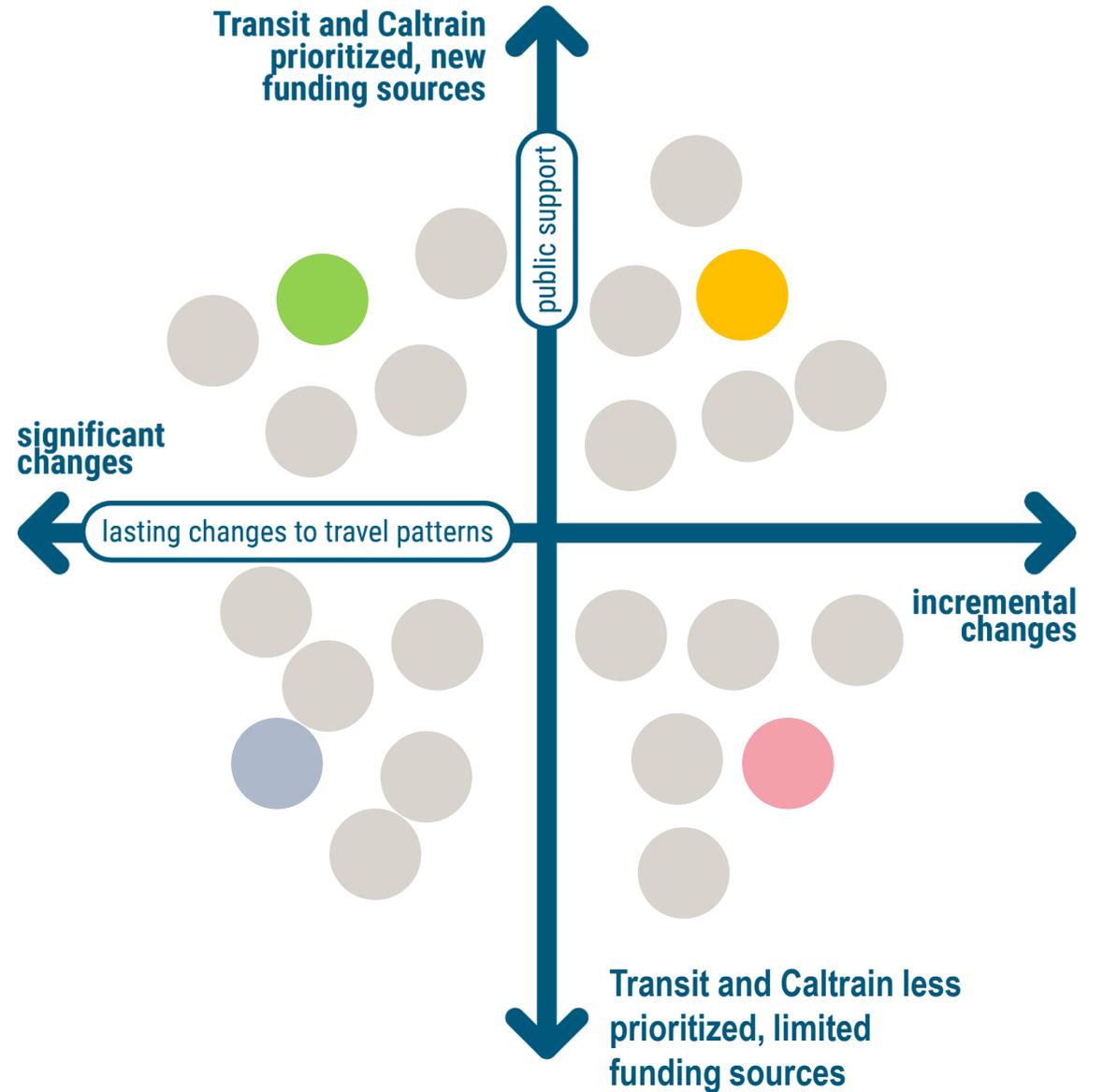
Surviving the Pandemic
(next 6 months to 3 years)

What will the **regional market and funding environment** look like during the transition period?

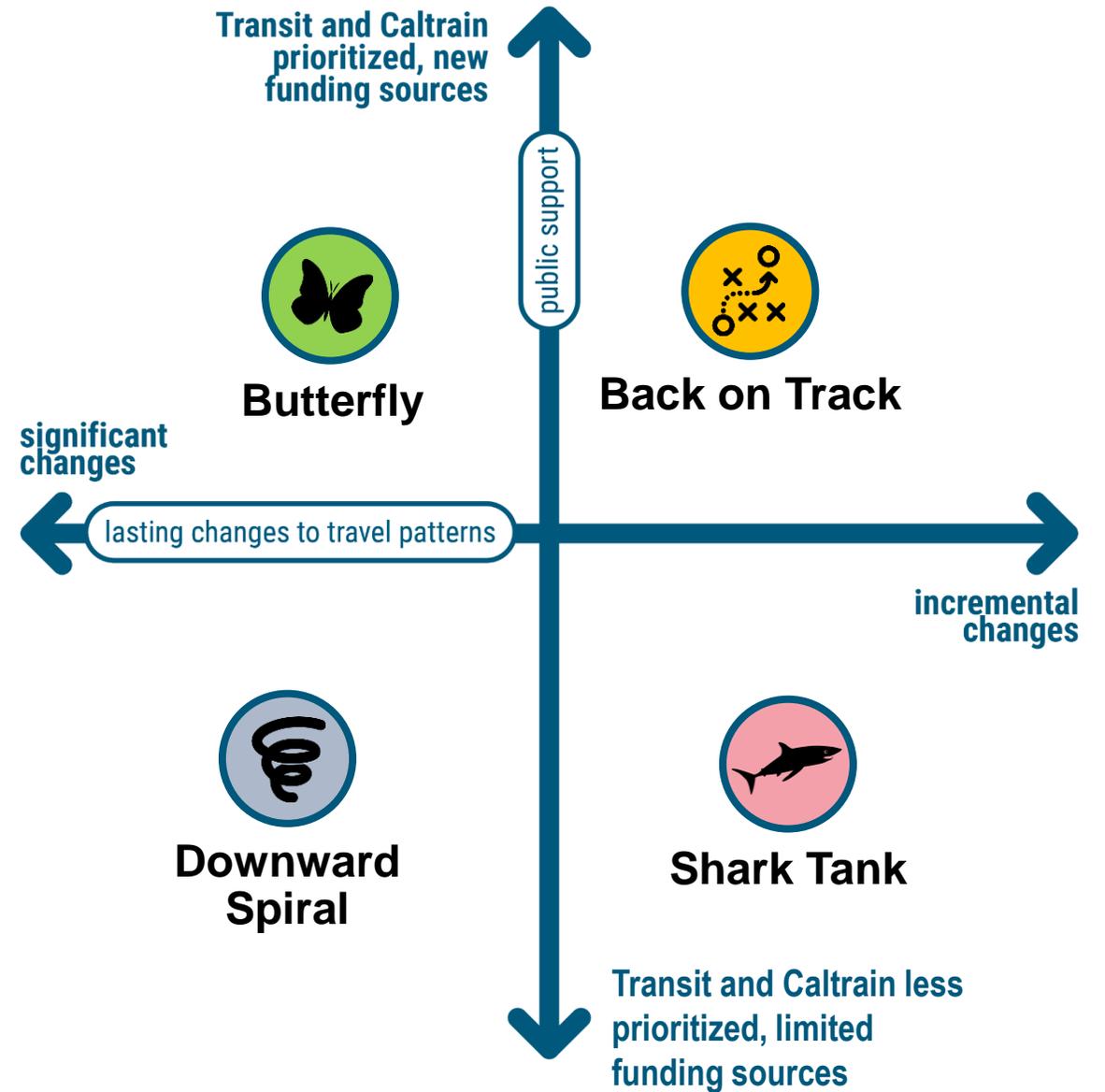
New Reality
(3-10 years)

What are the **lasting impacts in the region as a place to work, live and visit?**

Developing Stories About the Future



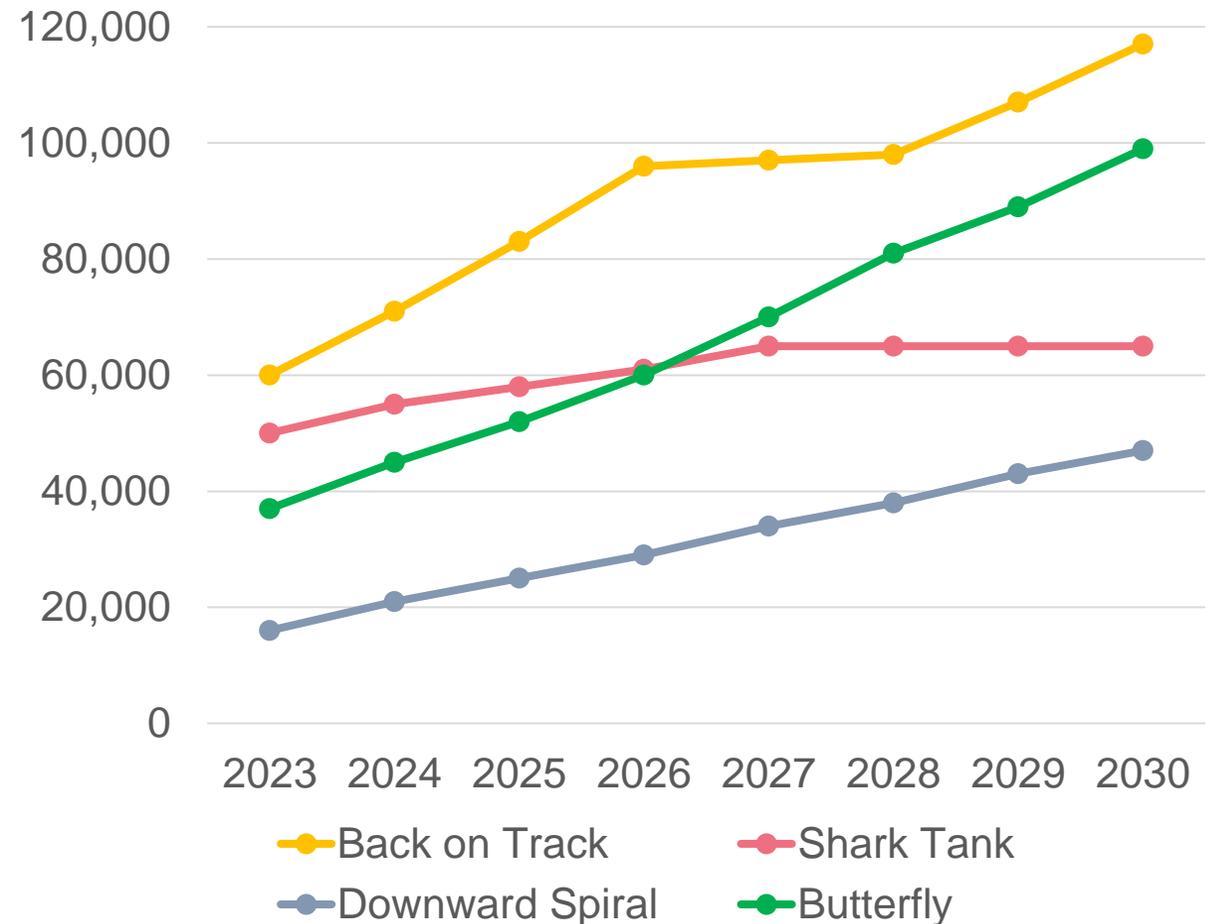
Four Caltrain Scenarios



Illustrative Ridership Projections by Scenario FY23-FY30

- **Back on Track:** Ridership returns quickly. Electrification and economic growth fuels demand for Caltrain service across both old markets and new ones.
- **Shark Tank:** Commute oriented ridership returns relatively quickly as the economy rebounds, but difficult financial conditions lead Caltrain to limit service expansion.
- **Downward Spiral:** Ridership never fully recovers due to economic stagnation and greatly expanded remote work. Caltrain service is not expanded and lack of frequent service and investment undermines long term market recovery.
- **Butterfly:** Despite significant changes to work habits, ridership steadily recovers as Caltrain is able to reinvent itself with expanded all-day service paired alongside outside funding and a transit supportive policy environment.

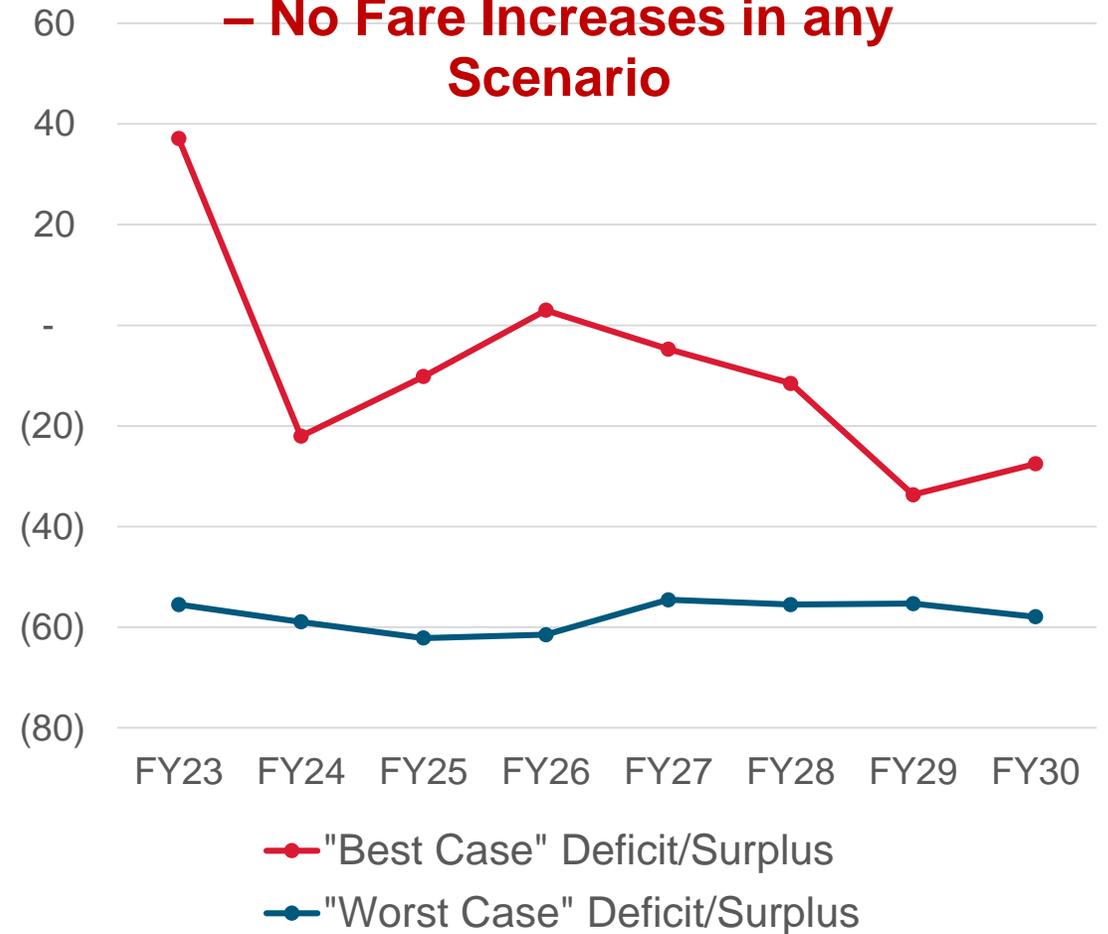
Projected Ridership by Scenario



Across all scenarios each year, what are the best and worst cases for the size of our deficit/surplus?

The graph on the right shows a spread of projected operating surpluses and deficits across all scenarios following the application of all Measure RR revenues but with no fare increases assumed in any scenario

Across all Scenarios: Projected Highest/Lowest Annual Deficit (\$M)
– No Fare Increases in any Scenario



Initial Conclusions from Financial Analysis of Scenario Work

Caltrain's scenarios are intended to highlight four plausible and divergent futures for the railroad. They are not plans - Caltrain is not "choosing" one of the scenarios

Similarly, the financialization of these scenarios is intended to show a range of plausible outcomes for the FY23-FY30 period based on different packages of assumptions and illustrative policy choices

Taken in aggregate, this work allows Caltrain to draw a number of important assumptions about the railroad's financial future

- **Restoring and building ridership is critical to Caltrain's ongoing financial sustainability.** The impact of COVID has had to ridership means that some kind of prolonged recovery is inevitable- this has severe financial implications for the railroad with deficits projected in a majority of circumstances.
- Caltrain is a high fixed-cost operation with a major system expansion (PCEP) already underway that will raise fixed costs further– **"cutting to prosperity" is not a viable strategy from either a service or financial perspective**
- **Inflationary pressures will be a constant challenge.** Caltrain is subject to the same inflationary pressures that have historically challenged the rest of the transit industry- with key cost drivers increasing faster than funding and revenue sources

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- **Robust fare revenue will always be an essential component of Caltrain's revenues.** While Caltrain must address equity issues and attract new riders, there is no viable source of funding – including Measure RR- that can substitute for a robust level of overall fare revenue
- Absent ongoing member funding or other new sources, **Measure RR revenues will be substantially needed to support Caltrain's operations across all scenarios.**
- **Funding and revenue sources outside of Measure RR are needed.** Significant additional sources of funding and revenue – such as JPB Member funds - will be critical to overcoming anticipated operating deficits and will be needed to support capital needs including SOGR and future system expansion

Planning for a less certain future

Transactional Space

- Transit must continue to address public health as well as equity and anti-racism in service, fares and participation.
- Some transit agencies and local governments will undergo significant, transformative crises – albeit insulated by relief funding
- Leadership and organizational changes will occur
- Sustained favoring of personal mobility
- There will be more focus on multi-purpose projects which address multiple public goals.
- There will be significant advances in automated transportation as well as other mobility-interfacing technologies
- The way government delivers services will change to address participation, equity, resiliency and operational efficiency, with more creativity.

Next 18 months

2030 onward

Business Environment

- Vaccines and treatments for COVID-19 will continue rolling out over months or years.
- Some degree of hybrid ways of working (office and home) are here to stay, home deliveries are here to stay, and some auto congestion is also here to stay.
- The economic fallout from COVID and SIP will continue to manifest for months with closures and lower incomes.
- Repurposing and adaptation of land uses will deepen as the nature of work, retail and school in the region change.
- The region's demographics will shift as companies adapt their business strategy and lower wage and hybrid workers move to lower-cost regions
- Sustainability and reducing carbon emissions will become more essential. Climate change events, sea level rise resiliency and recovery will become increasingly important.

Initial thoughts on Robust Options and Actions

"no-regrets" and "must dos"

- **Diversification** of revenue/funding sources and markets with **equity-focus** as a key strategy
- Significantly evaluating, reshaping, **rethinking fares and service** to meet evolving opportunities and needs (during and beyond the pandemic)
- **Asset monetization** and **entrepreneurial approaches** are essential, or at least helpful, in all scenarios as is a **focus on efficiency** and careful **management of financial capacity**
- New **partnerships** with both public and private actors are necessary or helpful in all scenarios
- The need to **address governance and organizational change** is present in all scenarios

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