

# Automated Fare Collection 2.0

## Next Generation MBTA Fare System

*Policy Development Working Group*

*November 2, 2018*



# Overview

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THE MBTA SEEKS BROAD PUBLIC INPUT ON THE UPCOMING UPDATE OF ITS FARE COLLECTION SYSTEM. INPUT WILL INFORM KEY FARE POLICY DECISIONS.

- 1. Introductions**
- 2. Updates on requests from the last meeting**
- 3. Role of the Policy Development Working Group**
  - a. How does this group fit into the broader outreach strategy for this project?
  - b. Proposed schedule of upcoming meetings and topics
- 4. Introduction of today's focus area: Access to Fare Sales Locations**
- 5. Overview of fare sales locations outreach strategy**
  - a. Demonstration of public input tool for AFC 2.0 sales locations
- 6. Overview of proposed data analysis approach for determining sales locations**
- 7. Brainstorm criteria for evaluating the sales network after implementation**
- 8. Wrap-up**

# AFC 2.0 Policy Updates

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PUBLIC OUTREACH FOR AFC2.0 WILL PRIMARILY FOCUS ON THESE FOUR POLICY AREAS.

- **Data Privacy**

- Policy team working with internal stakeholders on policy principles and draft policy, developing data retention schedule
- **Next Steps:** Outreach and public comment period in early 2019

- **Access to Fare Cards and Sales Locations**

- Policy team working with AFC 2.0 team and SI to evaluate potential point of sale locations, outreach on programs for cards distributed for free
- **Next Steps:** Current focus area for public outreach (incl. focus groups, street teams, community events)

- **Fare Inspections/Proof of Payment**

- Policy team working with AFC 2.0 team and SI on requirements for inspection devices and business requirements for citation management engine, identifying policy decisions to be discussed
- **Next Steps:** Outreach on inspection starts Spring 2019

- **Fare Structure and Products**

- Policy team working with AFC 2.0 team and SI on translating existing fare policy into business requirements for initial AFC 2.0 tariff, working on revenue and ridership model
- **Next Steps:** Outreach on draft initial tariff in early 2019

# Role of the PDWG

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THE MBTA IS USING FOUR PRONGED APPROACH TO OUTREACH FOR AFC 2.0

## Multiple Levels of Engagement

### 1. Meeting people where they are

- Street teams with CharlieVan to distribute CharlieCards and get input

### 2. Going to community meetings and events

### 3. Public meetings rotating around the region

- **Public Advisory Meeting #2,**  
December 11, 2018, Chelsea Senior Center, 6:30 – 8 pm

### 4. Working group to delve into policy details

- **Policy Development Working Group Meeting**

# Schedule of upcoming PDWG Meetings

TENTATIVE SCHEDULE OF UPCOMING MEETINGS FOR THE POLICY DEVELOPMENT WORKING GROUP

Month	Focus Area	Location
November	<ul style="list-style-type: none"><li>• Access to Fare Cards &amp; Sales Locations</li></ul>	Grove Hall
January	<ul style="list-style-type: none"><li>• Business, Fare, and Transfer Rules for Initial Project Implementation (Day-1 Tariff)</li><li>• Principles for the MBTA Privacy Policy</li></ul>	Chelsea
March	<ul style="list-style-type: none"><li>• Fare Inspections/Proof of Payment</li></ul>	TBD
May	<ul style="list-style-type: none"><li>• TBD</li></ul>	TBD



# **ACCESS TO FARE SALE LOCATIONS**

# How we're locating Points of Sale

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WE'RE CONDUCTING A THREE-PRONGED APPROACH TO DETERMINING THE LOCATIONS OF POINTS OF SALE IN AFC 2.0

- **Quantity Standards:** Where are most people going/coming from?
  - Input: Ridership data from Origin-Destination model
- **Community Input:** Where do people want to buy cards and add money?
  - Input: Feedback from communities most impacted
- **Data Analysis:** Where are the people who need points of sale the most?
  - Input: Data on senior/TAP usage, cash usage, low-income households

# Overview of AFC2 Quantity Standards

THE QUANTITY STANDARDS ARE MEANT TO ENSURE SUFFICIENT POINTS OF SALE FOR THE GENERAL MBTA RIDERSHIP

## Required Points of Sale

- Enough bus stops to serve at least 25% of total bus ridership (FVM)
- All SL1, SL3, SL4, & SL5 stops (FVM)
- All SL2 stops (POS)
- Highest ridership stop per route (POS)
- Enough bus stops to serve at least 50% of total bus ridership (POS)
- Light rail & bus transfer point (POS)
- Gated stations (FVM)
- Enough GL stops to serve at least 65% of total GL ridership (FVM)
- All GL D branch stops (POS)
- Higher ridership stop per GL branch (POS)
- GL terminals (FVM)
- ML terminals (FVM)
- Enough ML stops to serve at least 65% of total ML ridership (FVM)
- Highest ridership ML stop (POS)
- High-density transfer point between CR and bus (POS)
- Transfer point between CR and bus serving  $\geq 250$  inbound passengers/day (POS)
- CR Zone 1A stations (FVM)
- Enough CR stops outside Zone 1A to serve at least 50% of inbound boardings (POS)
- Remaining CR stations (POS)
- Ferry terminals (POS)
- Remaining Bus, GL, and ML stops such that 95% of ridership has a Point of Sale within 1000 feet of either the start or end of their journey (POS)
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# Requirements for AFC 2.0 Retailers

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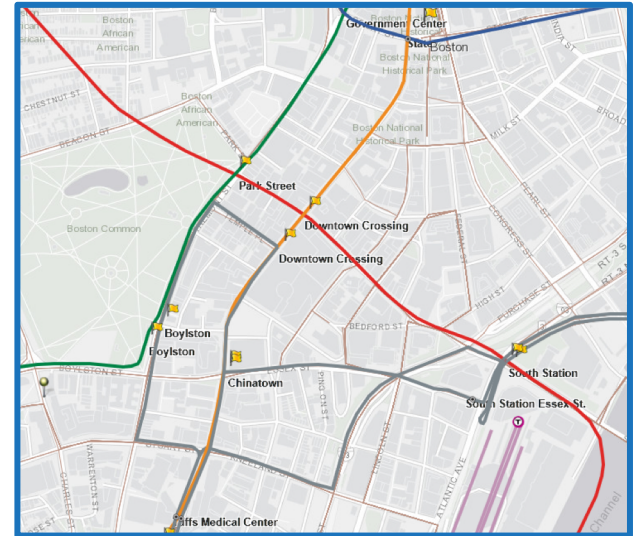
REQUIREMENTS FOR AFC 2.0 ARE MEANT TO ENSURE THAT CUSTOMERS CAN EFFECTIVELY USE RETAIL LOCATIONS TO ACCESS THE MBTA

- Retail locations must support the purchasing of Charlie Cards and stored value products
- Locations are required to meet Accessibility standards
- Retailers may not require users to make additional purchases in order to purchase fare cards or products
- Retailers that only accept cash may be permitted to continue to do so for fare products, but credit/debit must be available at all other locations
- Locations must be open  $\geq 75\%$  of the time MBTA operates.
  - For Commuter Rail, locations must be open between 6 AM - 12 PM at stations operating inbound service.
- Stock determined by individual retailer sales and replenished accordingly
- Community centers and non-profits with payment capabilities will be authorized to sell fare media. There will be designated "Agency Partners" that will be considered Administrative Point of Sale (APOS) locations.

# Public Input for POS Locations

WE'RE ENGAGING THE PUBLIC TO MAKE SURE WE GET THE LOCATIONS OF POINTS OF SALE RIGHT IN AFC 2.0.

- Focus groups with community organizations and riders
- Online Tool for Public Input on AFC 2.0 Points of Sale
  - [www.mbta.com/afc2-locations](http://www.mbta.com/afc2-locations)
- Meetings with municipal officials and elected representatives
- Street teams with the CharlieVan



**Tool for Public Input on  
AFC 2.0 POS**

# Ensuring Access for Everyone

AFC 2.0 IS INTRODUCING NEW WAYS TO ADD MONEY TO INCREASE FLEXIBILITY AND ACCESS WHILE CREATING OPERATIONAL BENEFITS TO IMPROVE SERVICE FOR CUSTOMERS.

Based on feedback from riders we are filling in this matrix of what types of sales locations work for which communities to find the holes

	Station FVM	Street FVM	Retail	Agency Partners	Call Center	Smartphone	Online
	\$ C	\$ C	\$ C	\$ C	C	C	C
Seniors							
People with Disabilities							
Cash users							
Low-income							
People of color							
Youth							



Cash accepted



Credit/debit accepted



# Data Analysis for POS Locations

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THE MBTA IS CONDUCTING DATA ANALYSIS TO ENSURE THAT VULNERABLE POPULATIONS ARE ABLE TO ACCESS FARE CARDS AND SALES LOCATIONS.

## Data Analysis Strategy

1. Map where **low income** and **minority** populations are (Data: U.S. Census)
2. Determine where customers are currently using **cash and CharlieTickets**
3. Determine where are customers boarding who may have mobility impairments (Data: **Senior/TAP Card** Usage)
4. Overlay this information to identify which locations must be served by points of sales in AFC 2.0
5. Compare this list to POS proposed locations to identify gaps

## Questions

1. Do we assign different weights to the data above?

# Evaluating the network after implementation

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THE POINT OF SALE NETWORK WILL BE EVALUATED YEARLY TO ENSURE THAT IT CONTINUES TO MEET THE NEEDS OF CUSTOMERS.

## Questions

1. How should we engage the public to make sure that the POS network meets their needs?
2. Should we establish a tool for people to request FVMs?
3. How can we work with the public to identify retailers and community organizations to partner with the MBTA?
4. What criteria should we use to prioritize additional POS locations?

# Wrap-Up/Debrief

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- Date for next meeting?
- Location for next meeting?



# Questions?

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Visit our website for more information about AFC 2.0 and ongoing project updates:

[www.MBTa.com/AFC2](http://www.MBTa.com/AFC2)

## Contact

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