



**Massachusetts Bay
Transportation Authority**

Fare Transformation

Fiscal and Management Control Board

February 8, 2021

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Field Demonstration



Field Demonstration of Cubic Readers

On buses

New readers will be available on most buses used on routes 28 and 39. The readers will be mounted on stanchions next to the fare box and near the priority seating area. Some buses will have additional readers located near the rear doors.



At stations


New readers will be mounted on top of some gates at Forest Hills Station and Ruggles Station.



Field Demonstration: What It Looks Like on Buses

Front door




New Charlie Cards tap the reader mounted on the stanchion


Old CharlieCards and CharlieTickets continue to use the farebox

Rear doors (both sides)



New fare card readers coming soon.

 New readers have been installed on this vehicle for MBTA testing purposes. At this time, they are not for public use. They are a step in the Fare Transformation journey.

You can learn how to participate in future public pilots and more about this exciting project at [MBTA.com/projects/fare-transformation](https://www.mbta.com/projects/fare-transformation)

 Massachusetts Bay Transportation Authority



Field Demonstration: What it Looks Like in Stations

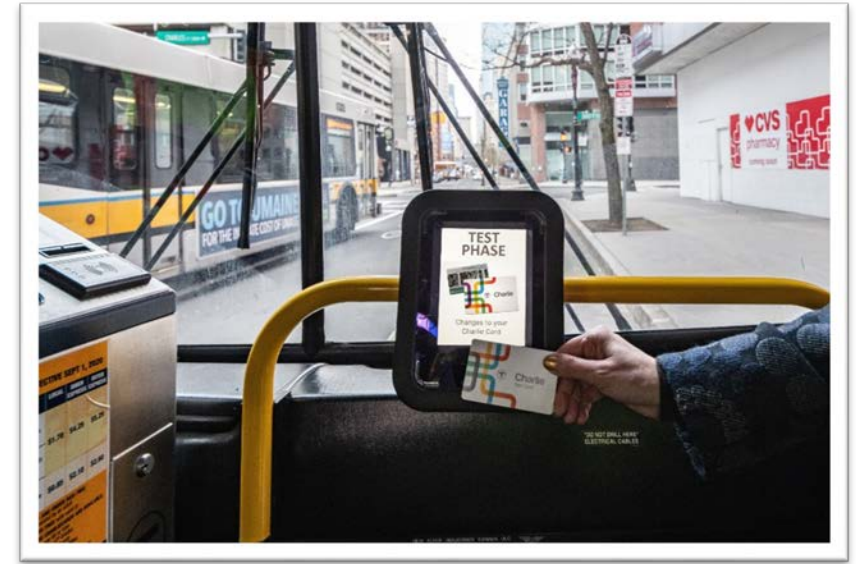


What We're Testing

Data will be gathered from these devices over the next 2 months to **prove out our installation approaches and confirm system readiness** for future pilots.

We will be evaluating factors such as:

- installation methods
- power consumption
- cellular data communications
- installation and equipment durability
- physical arrangement in actual revenue service conditions
- back-office communication and data processing
- software stability

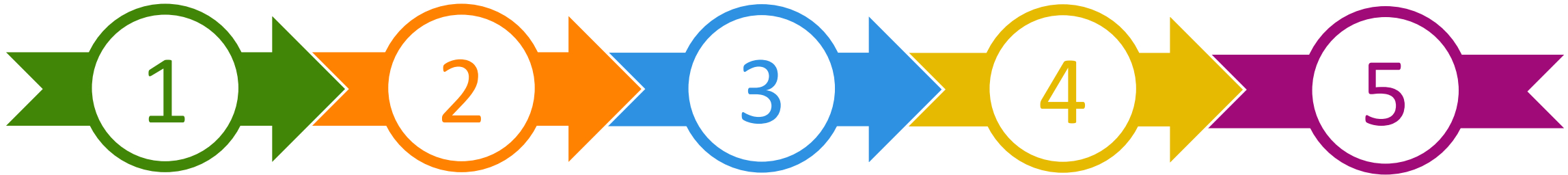


Project Progress








Fare Transformation Customer Journey

Customers will see improvements rolled out in five stages






Key frustrations addressed

2020

-  Tap on to Fairmount Line using my Charlie Card
-  Get a new Charlie Card from a location in my community
-  Pay the same fare regardless of whether I use a Charlie Card, Charlie Ticket or pay with cash
-  See fewer subway gates out of service or in need of repairs
-  Take advantage of the new fare options being piloted





Easier to get a Charlie Card

2021

-  Get a new Charlie Card from a vending machine at any subway station
-  Apply for or renew a reduced fare CharlieCard more easily (for seniors, youth and persons with disabilities)
-  See fares being collected consistently on Commuter Rail using gates at terminal stations






New ways to pay

2022

-  Tap using my contactless credit card, Apple Pay or Google pay on the Orange Line, Green Line, and select bus routes
-  Participate in a pilot and be the first to have the new Charlie Card and mobile app
-  Board on the rear door on at the busiest stops on select bus routes
-  Get a Charlie Card and reload at a growing number of retailers





Faster buses and Green Line trains

2023

-  Tap using my mobile device, contactless credit card, or new Charlie Card on all bus and subway routes
-  Board at any door on buses and Green Line trains
-  Use the Charlie website to manage my account online
-  Download the Charlie mobile app to view my balance and reload on the go
-  Get a Charlie Card and reload at many bus stops and even more retail locations

Seamless payments on all modes

2024

-  Use the same card to tap no matter where I travel
-  Tap on and transfer between all MBTA modes (including Commuter Rail, ferry, subway and bus)
-  My employer has new tools to manage the pass I get through work and I have self-service options to manage my own account
-  See improvements to MBTA services overall, stemming from use of better ridership and revenue data

Phase
1

2020

Tap on to Fairmount Line



Tap on to Fairmount Line using my Charlie Card



Get a new Charlie Card from a location in my community



See fewer subway gates out of service or in need of repairs



Pay the same fare regardless of whether I use a CharlieCard, CharlieTicket or pay with cash



Take advantage of the new fare options being piloted

What we heard from customers

“I should be able to use my CharlieCard to transfer to/from the Fairmount Line.”

What we did

- Installed readers on platforms at all Zone 1A Stations on the Fairmount Line
- All CharlieCards can be used at these stations, including those loaded with stored value, monthly and daily passes, and reduced fare passes

South Station



Newmarket

Uphams Corner

Four Corners/Geneva

Talbot Avenue

Morton Street

Blue Hill Avenue

Fairmount



T COMMUTER RAIL

Getting downtown is about to get easier

8 weekday trips added starting this May on the Fairmount Commuter Rail Line

Plus, ride with your CharlieCard!

mbta.com/fairmount

KEOLIS | Massachusetts Transportation Authority | City of Boston Transportation



2020



Tap on to Fairmount Line using my Charlie Card



Get a new Charlie Card from a location in my community



See fewer subway gates out of service or in need of repairs



Pay the same fare regardless of whether I use a CharlieCard, CharlieTicket or pay with cash



Take advantage of the new fare options being piloted

CharlieCards Available at Community Locations

What we heard from customers

“It’s too hard to get a CharlieCard.”

What we did

- CharlieCards are now available at 50+ community locations, including:
 - Municipalities
 - Community organizations
 - Library branches
 - Boys & Girls Clubs
- In the first two years of this program, more than 24,000 Charlie Cards were distributed through community partners.



Phase
1

2020

Better Working Subway Gates



Tap on to Fairmount Line using my Charlie Card



Get a new Charlie Card from a location in my community



See fewer subway gates out of service or in need of repairs



Pay the same fare regardless of whether I use a CharlieCard, CharlieTicket or pay with cash



Take advantage of the new fare options being piloted

What we heard from customers

“Fare gates are frequently broken and are being held together by duct tape.”

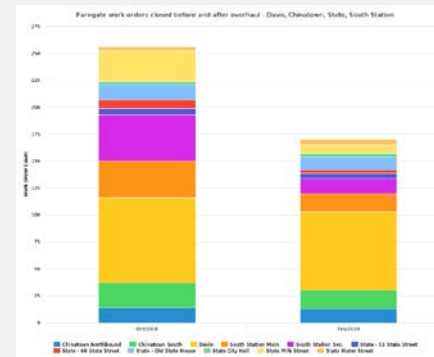
“It’s not fair that I pay for a monthly pass when other people are just walking through the open gate!”

What we did

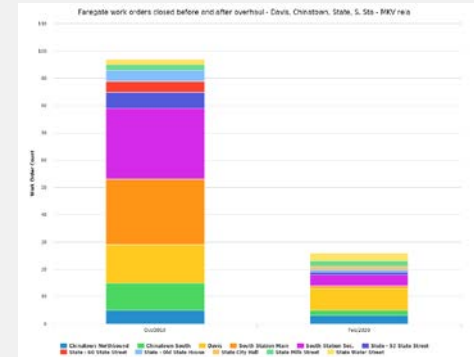
- Legacy fare gates were overhauled as part of last year’s station improvements
 - Mechanical overhaul: replaced mechanical parts of fare gates (e.g. motors, doors)
 - Technology upgrade: replaced gate computers and card readers
- Results include:
 - Improved the reliability of faregates
 - Decreased revenue loss due to open gates
 - Overall appearance of gates improved
 - Fewer jams from magnetic stripe CharlieTickets
- Issues with CharlieTicket slots, which are one of the most common problems on the gates will be eliminated entirely when tappable CharlieTickets are introduced in Phase 2.



All reports of fare gate issues



Issues with CharlieTicket slot





Equal Fares for Riders without CharlieCards

2020



Tap on to Fairmount Line using my Charlie Card



Get a new Charlie Card from a location in my community



See fewer subway gates out of service or in need of repairs



Pay the same fare regardless of whether I use aCharlieCard, CharlieTicket or pay with cash



Take advantage of the new fare options being piloted

What we heard from customers

“It’s not fair to pay more for CharlieTickets”

What we did

- In May 2020, the FMCB approved lowering the CharlieTicket and cash fares to CharlieCard levels.
- As of September 2020, all fare payments are now the same, regardless of whether a customer is using a CharlieCard, a CharlieTicket, or cash.



Subway One-Way

\$2.40

with CharlieCard, CharlieTicket, or Cash



Local Bus One-Way

\$1.70

with CharlieCard, CharlieTicket, or Cash



Phase
1

New Fare Pilots Introduced

2020



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Get a new Charlie Card from a location in my community



See fewer subway gates out of service or in need of repairs



Pay the same fare regardless of whether I use a CharlieCard, CharlieTicket or pay with cash



Take advantage of the new fare options being piloted

What we heard from customers

“Why is Youth Pass the only reduced fare without a Commuter Rail discount?”

What we did

Half-Price Zone 1A Commuter Rail Fares for the Youth Pass

- Previously Youth Pass reduced fare was limited to bus and subway
- Now Youth Pass holders can access Zone 1A stations for a reduced price

Other fare pilots

Zone 1A Fares Between Lynn and North Station

- Take the Commuter Rail between North Station and Lynn or River Works for just \$2.40, the same price as a Zone 1A or subway fare

Brockton Commuter Rail Fare Initiative

- Reduced Commuter Rail fares for eligible Brockton residents
- Program aims to reduce crowding on Brockton Area Transit (BAT) bus service to Boston and allow for social distancing during the COVID-19 pandemic



Phase
2

2021

Fare Vending Machines Will Dispense Cards



Get a new Charlie Card from a vending machine at any subway station



Apply for or renew a reduced fare CharlieCard more easily (for seniors, youth and persons with disabilities)



See fares being collected consistently on Commuter Rail using gates at terminal stations

What we heard from customers

“It’s too difficult to get and reload a CharlieCard”

What we’re doing

- Installing new fare vending machines, which will dispense both CharlieCards and tappable CharlieTickets.
- Updating to latest payment industry standards to securely process credit and debit card payments.



Phase 2

2021



Get a new Charlie Card from a vending machine at any subway station



Apply for or renew a reduced fare CharlieCard more easily (for seniors, youth and persons with disabilities)



See fares being collected consistently on Commuter Rail using gates at terminal stations

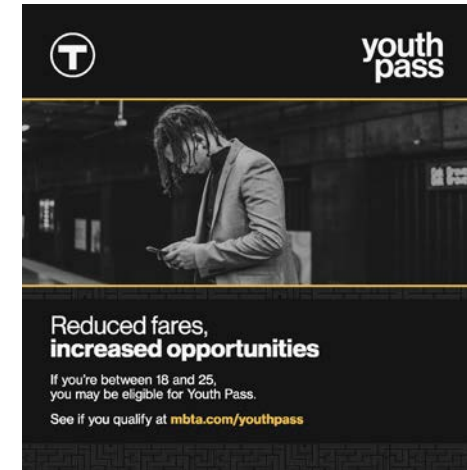
Easier to Apply for Reduced Fares

What we heard from customers

“It’s a hassle to get a reduced fare card”

What we’re doing

- Reviewing application, renewal and eligibility management processes for all of the MBTA’s reduced fare programs:
 - Senior CharlieCard
 - Transportation Access Pass (TAP) CharlieCard
 - Blind Access CharlieCard
 - Youth Pass CharlieCard
 - Student CharlieCard (M7 and S-Card)
- Developing a secure online, universal reduced fare application process
 - Online application is being tested
 - Proof of concept completed for Brockton Commuter Rail Fare Initiative (to allow for social distancing during COVID-19)
 - RFP released for application management system
- Upgrading our internal systems to improve customer service, reporting, and business processes



Phase
2

Improved Fare Collection on Commuter Rail

2021



Get a new Charlie Card from a vending machine at any subway station



Apply for or renew a reduced fare CharlieCard more easily (for seniors, youth and persons with disabilities)



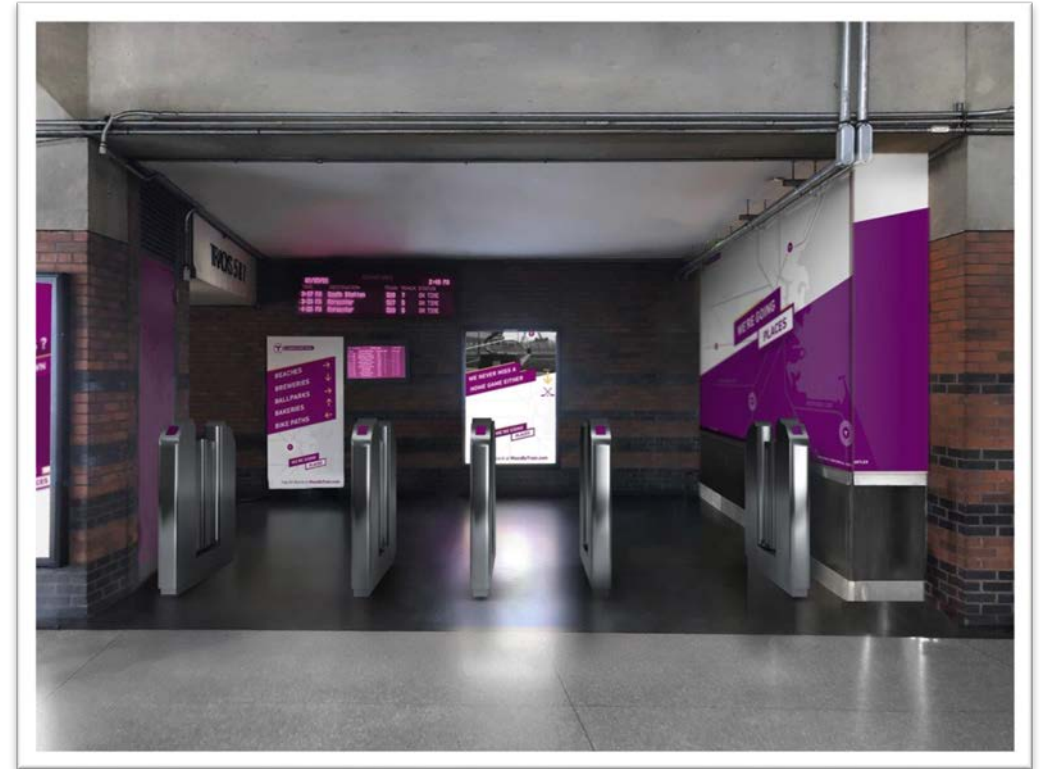
See fares being collected consistently on Commuter Rail using gates at terminal stations

What we heard from customers

“Fares are collected inconsistently on the Commuter Rail”

What we're doing

- Installing fare gates at North Station, South Station and Back Bay
- Goals:
 - Reduce uncollected fares on Commuter Rail using gates at terminal stations
 - Ensure that all passengers have a valid form of payment at the busiest stations

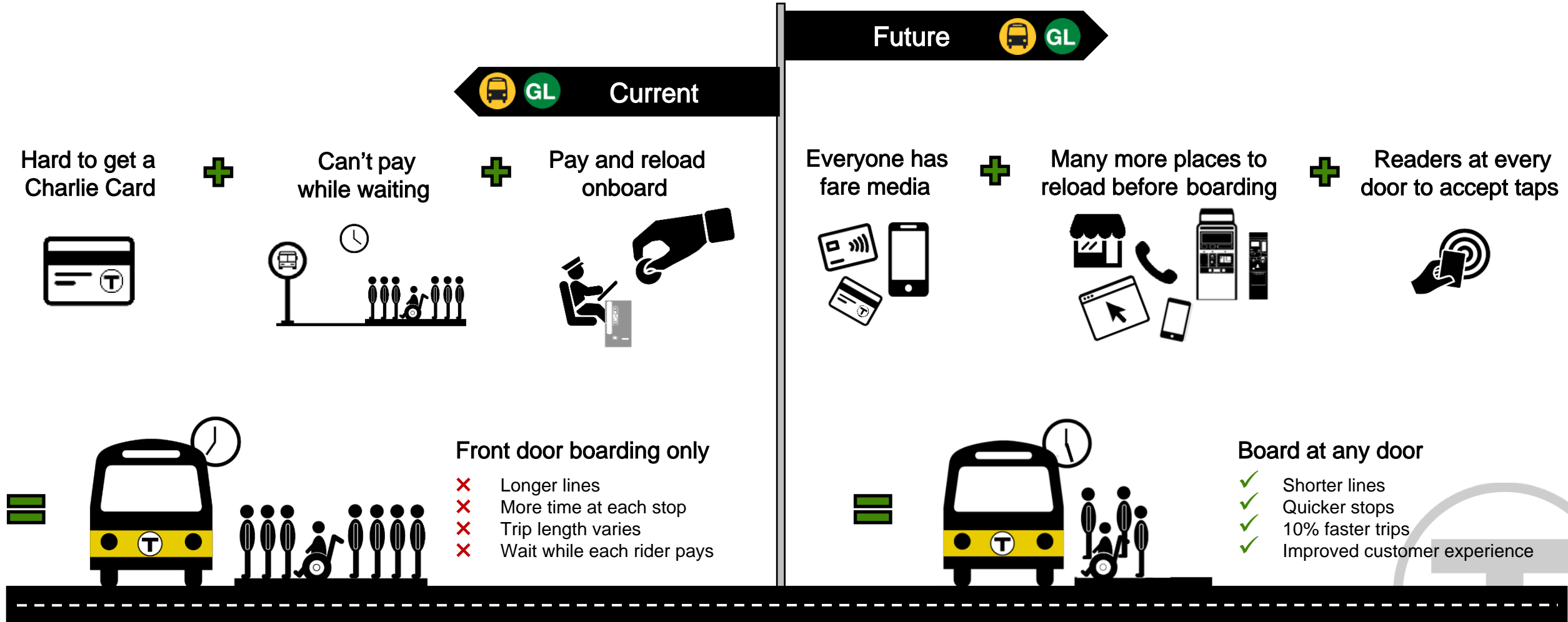


All-Door Boarding



All-Door Boarding for Faster and More Reliable Service

By allowing customers to board at any door, we will reduce dwell times and improve speeds of bus and Green Line



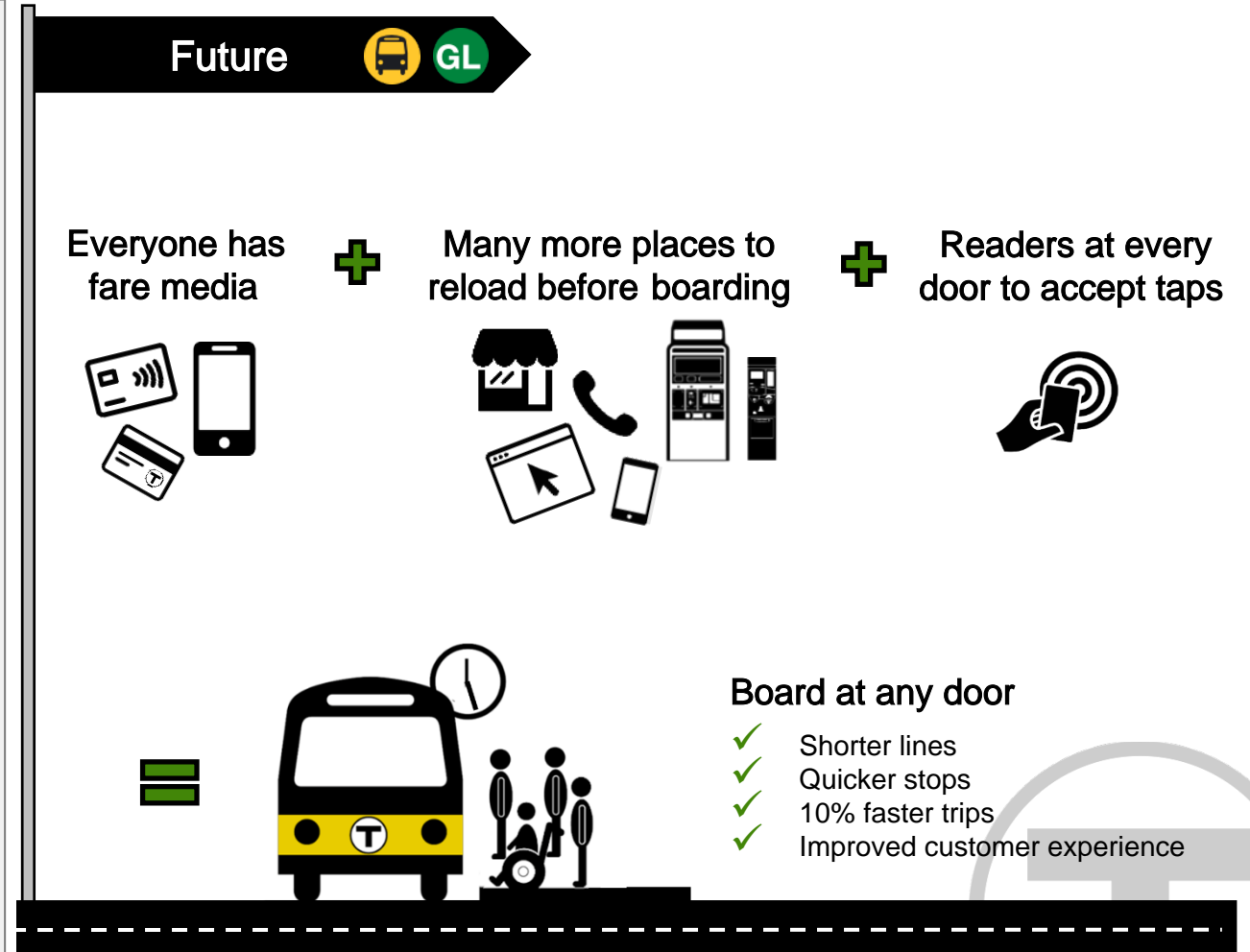
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Workstreams to support all-door boarding

To get to this future state, the MBTA will:

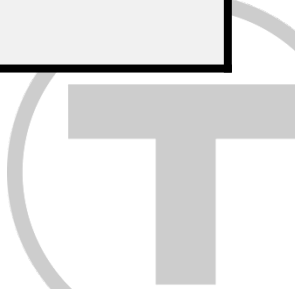
- Install **readers at all doors** on buses and Green Line
- Develop **fare rules** around fare media to allow for **expanded access** across the transit network
- Implement **proof of payment** program to encourage and ensure fare compliance
- Make it **more convenient for riders to reload their CharlieCards** before boarding
 - Gather public input on the design of an **extensive cash sales network**
 - Support **additional sales channels** for customers with credit or debit cards, including online, by phone, via mobile app, and autoload



More Flexibility for How We Address Fare Evasion

The following are legislative changes related to fare evasion in the **Transportation Bond Bill** adopted in January 2021.

Change in Bond Bill	What does this mean for the MBTA and riders?
Decriminalizing fare evasion	Riders can no longer be arrested solely for evading paying their MBTA fare.
The ability for the MBTA to designate who can issue fare citations	The MBTA can now specify employee classes to issue fare citations, allowing the Authority to hire a civilian fare verification team which will be needed to implement Proof of Payment.
Provided MBTA with regulatory authority to set fine levels and appeals process	The MBTA can now issue regulations to lower fines to a level more appropriate to the type of fare non-compliance.
Established an annual report on warning and citation data published by OPMI.	The MBTA will now issue an Annual Report on fare citations and fare evasion.



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Fare Evasion Regulatory Process

Once draft regulations are reviewed by MBTA, FMCB, and Administration & Finance:

- Regulations promulgated under 950 CMR 20.00 and M.G.L. c. 30A
- Requires a public hearing and standard regulatory process
- Make draft of regulations available to the public
- Public hearing held to gain feedback
- After hearing, the MBTA will need to submit final regulations
- Once published in the Register, regulations take effect (approximately 2 weeks)



✓ TAP

\$20
\$10
\$5
\$1

Upcoming Policy Conversations

Preview for March FMCB Meeting

AUDIO



Massachusetts Bay
Transportation Authority

Public Outreach on Future Fare System

This Spring MBTA will launch a public outreach process. On March 8th we will be back before the FMCB with more detail.

MBTA will be seeking public input on the following topics:



Regulations for **short-term** changes based on Transportation Bond Bill



Changes to **fare cards and fare rules**, starting in 2023



Improvements to where and how riders **can access fare media**

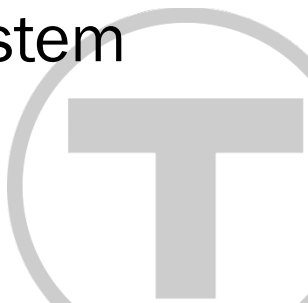


Changes for riders to implement **Proof of Payment**



Fare Rules in our Next Generation Fare System

- It will be important for **every rider to have a Charlie Card** to speed up bus and trolley service, enable new convenient payment options, and integrate Commuter Rail into our fare collection system.
- To make this possible, there will be several changes to MBTA fare cards starting in 2023, including:
 - A one-time cost to obtain a fare card;
 - Programs for reduced fare and other riders to obtain a card at no cost;
 - Moving to “one rider = one card” (i.e., eliminating passback or card sharing);
 - Allowing “one more trip” with a low balance; and,
 - Several new fare media options.
- Public outreach will cover the impacts of these media changes and solicit input on the ways MBTA is trying to smooth the transition to the new system



New Possibilities in Our Next Generation Fare System

Other fare rule changes being considered for system roll-out:

- The MBTA is considering potential adjustments to transfer rules as part of system roll-out
- Once in place, the new system will also provide additional **flexibility for future changes to MBTA fares**
- Public outreach will solicit input on potential transfer rule changes and record any ideas from the public for other future fare changes



New readers testing at Ruggles Station



To Develop Our Proposed Sales Network, We Asked...

How do you use the system now?

1. How do you normally pay for MBTA services (e.g., cash onboard, weekly, monthly passes)?
2. If you use a CharlieCard or CharlieTicket, how often do you add value to it? How much value do you add (e.g., one trip, multiple trips)?
3. How do you decide how much value to add to your card or ticket?












Where would you use the new system?

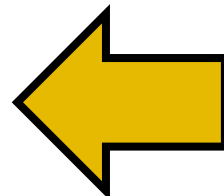
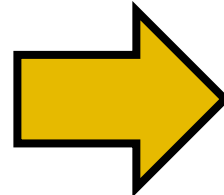
1. Would you still use cash to pay for the bus if you could not add that cash onboard?
2. Where would you like to see new fare vending locations (e.g., grocery stores, corner stores, libraries/churches, etc.)?
3. Would you prefer to load value at a location inside of a building or an outside location?
4. Which is more important: a convenient location, or being able to add value at any time?



We Also Thought About Who Our Riders Are and How All Parts of the New System Could Work for Them

Fare Media Products

- Station Fare Vending Machine  
- Streetscape FVM  
- Retail Locations  
- Agency Partners  
- Call Centers 
- Smartphone 
- Online 




Critical Populations of Riders

- Seniors
- Persons with Disabilities
- Cash Users
- Low-income people
- Limited English speakers
- Youth

Based on feedback from riders, we are creating a sales network to work for our community.

We know what's critical for riders, is a diversity of options.

 Cash accepted

 Credit/debit accepted

We Came Up with Principles to Prioritize Rider Needs

- 1. Prioritize communities that use cash today**
- 2. Prioritize high total ridership locations**
- 3. Ensure that riders have a diversity of options**
- 4. Prioritize seniors and riders with disabilities**
- 5. Prioritize locations with high number of low-income and/or Black or Latinx riders**
- 6. Incorporate geographic distribution to cover need across the network**



Implementing Proof of Payment (POP) at the MBTA

At the MBTA, each mode of transit would need a slightly different approach to proof of payment

Commuter Rail & Ferry

Fare Verified by
Fare Gates and/or
Conductors/Crew

Bus & Light Rail

Fare Verified by
Fare Verification
Team

Rapid Transit

Fare Verified by
Station Fare Gates

To do any of this, the MBTA needs feedback on:

- Types of non-compliance
- How fare checks are conducted
- Training
- Reporting



To Guide Our Process for Implementing POP, We Have Drafted a Set of Guiding Principles

Respectful:

- The MBTA seeks to develop a Customer-oriented enforcement approach to fare payment compliance. De-criminalizing fare evasion was a first step in this process.

Responsible:

- Fare is Fair. All riders need to tap their card and pay the correct fare.

Equitable:

- MBTA will seek to check all riders on a vehicle. Meaning every individual on a vehicle will be asked to provide Proof of Payment. The MBTA will strive to route staff fairly and equitably across our services with all-door boarding.

Customer-Focused:

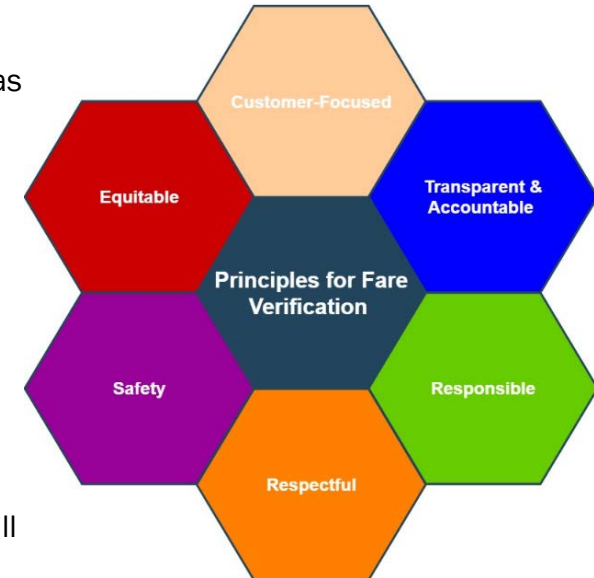
- Fare verification personnel will be recruited from the community to reflect the diversity of our ridership. MBTA fare verification staff will be trained before starting in a variety of important topics, including, customer service, anti-discrimination, diversity, implicit bias, and effective communication and will have ongoing learning that promotes a customer focused approach.

Transparent & Accountable:

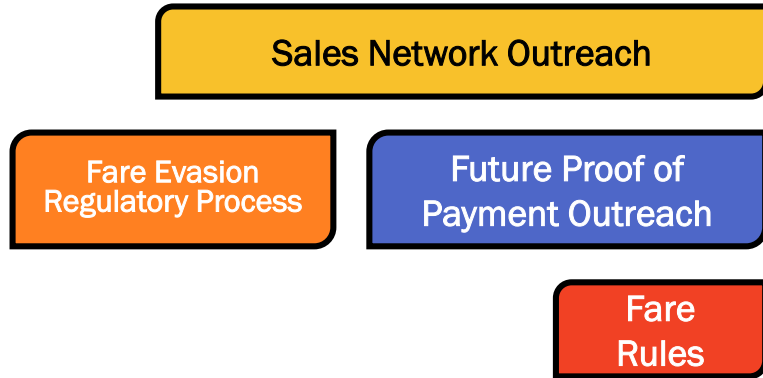
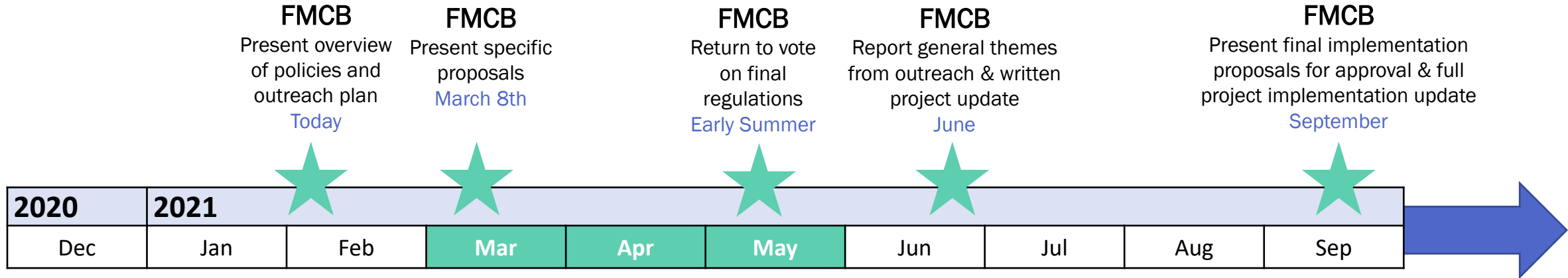
- The MBTA will ensure the rules and consequences for fare evasion are transparent and clearly communicated.
- The MBTA is committed to robust, transparent and innovative means to reach our customer base for input, feedback and operational suggestions for improvement.

Safety:

- The MBTA will develop fare verification policy and procedures that put the safety of our riders and staff first.



Policy Outreach Plan & FMCB Look-Ahead



We need the help of riders to ensure we get this right. Our team will be back to the Board in March to discuss our proposals and kickoff this outreach process.

