

Meeting Agenda

Fare Integration Task Force

Michael Hursh, Chair

Denis Mulligan, Vice Chair

Monday, October 23, 2023

12:45 PM

Board Room – 1st Floor

The Fare Integration Task Force is scheduled to meet at 12:45 pm.

Meeting attendees may opt to attend in person for public comment and observation at 375 Beale Street, Board Room (1st Floor). In-person attendees must adhere to posted public health protocols while in the building. The meeting webcast will be available at <https://mtc.ca.gov/whats-happening/meetings/live-webcasts>. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number.

Members of the public participating by Zoom wishing to speak should use the “raise hand” feature or dial *9. When called upon, unmute yourself or dial *6. In order to get the full Zoom experience, please make sure your application is up to date.

Attendee Link: [<https://bayareametro.zoom.us/j/89359573334>]
iPhone One-Tap: US: +13462487799,,89359573334# US (Houston)
+16699006833,,89359573334# US (San Jose)

Join by Telephone (for higher quality, dial a number based on your current location) US:
888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)
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International numbers available: <https://bayareametro.zoom.us/j/89359573334>

Detailed instructions on participating via Zoom are available at:

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<https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom>

Members of the public may participate by phone or Zoom or may submit comments by email at info@bayareametro.gov by 5:00 p.m. the day before the scheduled meeting date. Please include the committee or board meeting name and agenda item number in the subject line. Due to the current circumstances, there may be limited opportunity to address comments during the meeting. All comments received will be submitted into the record.

Roster**Michael Hursh, Chair and Denis Mulligan, Vice-Chair****Members: Michelle Bouchard, Bill Churchill, Carolyn M. Gonot, Daryl Halls, Eddy Cumins, April Chan, Andrew Fremier, Kate Miller, Robert Powers, Christy Wegener, Jeffrey Tumlin.****1. Call Meeting to Order / Roll Call / Confirm Quorum.**

Quorum: A quorum of this committee shall be a majority of its regular voting members (7).

2. Chair Introduction / Remarks-Hursh**3. Consent Calendar**

- 3a. [23-1182](#) Approval of the Minutes from the August 28, 2023 Meeting

Action: Approval

Attachments: [3a FITF Minutes from the August 28, 2023 Meeting](#)

4. Information

- 4a. [23-1308](#) Update on No-Cost/Reduced-Cost Interagency Transfer Pilot

Project staff will present an update on the development of a memorandum of understanding to facilitate the launch of the No-Cost/Reduced-Cost Interagency Transfer Pilot in 2024, concurrent with the Next Generation Clipper system.

Action: Information

Presenter: William Bacon, MTC and Michael Eiseman, BART

Attachments: [4a Summary Sheet No-Cost Transfer Pilot Update](#)
[4ai No-Cost Transfer Pilot Update Presentation](#)

- 4b. [23-1183](#) Clipper BayPass Project Update

Project staff will present an update on work underway to allow for Clipper BayPass Phase 1 pilot educational and affordable housing participant institutions to remain in the program beyond June 30, 2024 under similar terms to the Clipper BayPass Phase 2 pilot participation agreement.

Action: Information

Presenter: Terence Lee, MTC, Ryan Reeves, BART and Jimmy Mahady, BART

Attachments: [4b 23-1183 Summary Sheet Clipper BayPass](#)
[4bi 23-1183 Clipper BayPass Presentation](#)
[4bii Joint Comment letter Clipper BayPass Pilot Phase 2](#)

5. Public Comment / Other Business

*Members of the public participating by Zoom wishing to speak should use the “raise hand” feature or dial *9. When called upon, unmute yourself or dial *6.*

6. Adjournment / Next Meeting

The next meeting of the Fare Integration Task Force will be held at a time and location to be duly noticed.

Public Comment: The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

Meeting Conduct: If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Committee may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

Record of Meeting: Committee meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site (mtc.ca.gov) for public review for at least one year.

Accessibility and Title VI: MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.

可及性和法令第六章: MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

Acceso y el Titulo VI: La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Attachments are sent to Committee members, key staff and others as appropriate. Copies will be available at the meeting.

All items on the agenda are subject to action and/or change by the Committee. Actions recommended by staff are subject to change by the Committee.

Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 23-1182 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 9/1/2023 **In control:** Fare Integration Task Force
On agenda: 10/23/2023 **Final action:**
Title: Approval of the Minutes from the August 28, 2023 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [3a FITF Minutes from the August 28, 2023 Meeting](#)

Date	Ver.	Action By	Action	Result
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Subject:
Approval of the Minutes from the August 28, 2023 Meeting

Recommended Action:
Approval

Attachments:

Meeting Minutes - Draft

Fare Integration Task Force

Michael Hursh, Chair

Denis Mulligan, Vice Chair

Monday, August 28, 2023

12:30 PM

BART Board Room
2150 Webster Street, 1st Floor
Oakland, CA 94612

Meeting attendees may opt to attend in person for public comment and observation in the BART Board Room at 2150 Webster Street, 1st Floor, Oakland, CA 94612.

Members of the public participating by Zoom wishing to speak should use the “raise hand” feature or dial *9. When called upon, unmute yourself or dial *6. In order to get the full Zoom experience, please make sure your application is up to date. In-person attendees must adhere to posted public health protocols while in the building. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number.

Attendee Link: <https://us06web.zoom.us/j/87023829681>

iPhone One-Tap: +16699006833,,87023829681# US (San Jose)

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1. Call Meeting to Order / Roll Call / Confirm Quorum.

- Present:** 11 - Chair Hursh, Vice Chair Mulligan, Task Force Member Powers, Task Force Member Tumlin, Task Force Member Gonot, Task Force Member Bouchard, Task Force Member Churchill, Task Force Member Wegener, Task Force Member Chan, Task Force Member Fremier, and Task Force Member Cumins
- Absent:** 2 - Task Force Member Halls, and Task Force Member Miller

Ron Grassi acted as a delegate and voting member of the Board in place of Darryl Halls. Actions noted below as "Halls" were taken by Grassi.

2. Chair Introduction / Remarks-Hursh

3. Consent Calendar

Upon the motion by Task Force Member Powers and second by Vice Chair Mulligan, the Consent Calendar was unanimously approved. The motion carried by the following vote:

- Aye:** 12 - Chair Hursh, Task Force Member Halls, Vice Chair Mulligan, Task Force Member Powers, Task Force Member Tumlin, Task Force Member Gonot, Task Force Member Bouchard, Task Force Member Churchill, Task Force Member Wegener, Task Force Member Chan, Task Force Member Fremier and Task Force Member Cumins
- Absent:** 1 - Task Force Member Miller

- 3a. [23-1041](#) Approval of the Minutes from the June 26, 2023 Meeting

Action: Approval

Attachments: [3a 23-1041 06-26-2023 Fare Integration Task Force Meeting Minutes.pdf](#)

4. Information

- 4a. [23-1043](#) Clipper® START Extended Pilot - Regional Fund Reimbursement

Proposal for a "one-time" payment to Bay Area transit operators participating in the extended Clipper START means-based discount fare pilot program.

Action: Information

Presenter: William Bacon (MTC)

Attachments: [4ai 23-1043 Summary Sheet Clipper START Extended Pilot Regional Fund Reimbursement.pdf](#)
[4aii PowerPoint Clipper START Extended Pilot Regional Fund Reimbursement.pdf](#)
[4aiii Attachment B Clipper START Extended Pilot Regional Fund Reimbursement.pdf](#)

5. Action

5a. [23-1042](#) Clipper® BayPass Pilot Phase 2 Next Steps

Proposed terms and principles for a Clipper® BayPass Pilot Participation Agreement and update on the next steps to launch Phase 2 of the Clipper BayPass Pilot.

Action: Task Force Endorsement

Presenter: Ryan Reeves (BART), William Bacon (MTC), and Terence Lee (MTC)

Attachments: [5ai 23-1042 Summary Sheet and Attachment A Clipper BayPass.pdf](#)
[5aii PowerPoint Clipper BayPass.pdf](#)

The following individuals spoke on this item: Adina Levin, Seamless Bay Area; Veda Florez, Policy Advisory Council; Wendi Kallins, Policy Advisory Council; Anne Olivia Eldred, Policy Advisory Council; Ian Griffiths, Seamless Bay Area; and Howard Wong, Policy Advisory Council.

Upon the motion by Task Force Member Fremier and second by Vice Chair Mulligan, the Clipper® BayPass Pilot Phase 2 Next Steps was approved for endorsement. The motion carried unanimously by the following vote:

Aye: 12 - Chair Hursh, Task Force Member Halls, Vice Chair Mulligan, Task Force Member Powers, Task Force Member Tumlin, Task Force Member Gonot, Task Force Member Bouchard, Task Force Member Churchill, Task Force Member Wegener, Task Force Member Chan, Task Force Member Fremier and Task Force Member Cumins

Absent: 1 - Task Force Member Miller

6. Public Comment / Other Business

Aleta Dupree was called to speak.

Adina Levin, Policy Advisory Council, was called to speak.

7. Adjournment / Next Meeting

The next meeting of the Fare Integration Task Force will be held at a time and location to be duly noticed.

Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 23-1308 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 10/5/2023 **In control:** Fare Integration Task Force
On agenda: 10/23/2023 **Final action:**
Title: Update on No-Cost/Reduced-Cost Interagency Transfer Pilot

Project staff will present an update on the development of a memorandum of understanding to facilitate the launch of the No-Cost/Reduced-Cost Interagency Transfer Pilot in 2024, concurrent with the Next Generation Clipper system.

Sponsors:

Indexes:

Code sections:

Attachments: [4a Summary Sheet No-Cost Transfer Pilot Update](#)
[4ai No-Cost Transfer Pilot Update Presentation](#)

Date	Ver.	Action By	Action	Result
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Subject:

Update on No-Cost/Reduced-Cost Interagency Transfer Pilot

Project staff will present an update on the development of a memorandum of understanding to facilitate the launch of the No-Cost/Reduced-Cost Interagency Transfer Pilot in 2024, concurrent with the Next Generation Clipper system.

Presenter:

William Bacon, MTC and Michael Eiseman, BART

Recommended Action:

Information

Attachments:

Clipper® Executive Board Fare Integration Task Force

October 23, 2023

Agenda Item 4a

Update on No-Cost/Reduced-Cost Interagency Transfer Pilot

Subject:

Project staff will present an update on the development of a memorandum of understanding to facilitate the launch of the No-Cost/Reduced-Cost Interagency Transfer Pilot in 2024, concurrent with the Next Generation Clipper® system.

Background:

In March 2023 the Fare Integration Task Force adopted a policy framework to support the deployment of a No-Cost and Reduced-Cost Interagency Transfer Pilot as a part of the Next Generation Clipper® system launch in 2024. This policy was identified as the second recommended action in the Transit Fare Policy Vision Statement, which the Task Force adopted in November 2021 at the conclusion of the Transit Fare Coordination/Integration Study + Business Case. According to the Study, this Pilot is expected to increase daily ridership across the Bay Area by approximately 27,000 trips per day.

No-Cost and Reduced-Cost Interagency Transfer Pilot is funded with \$22 million set aside through the Transit Transformation Action Plan by MTC and transit operators. As a part of the Pilot, transit operators will be reimbursed for the additional cost of the customer transit discount for eligible trips as defined in the Task Force-adopted policy framework. Due to the limited amount of funding available for the Pilot, it is currently expected that the Pilot will last for between 18-24 months starting at the launch of the Next Generation Clipper® system.

Continuing this user benefit will be a key topic of discussion in 2024 – the team expects to evaluate the potential for new fare revenue from expected ridership growth and identify other funding options to support this integrated fare policy change longer-term.

The project team staff from MTC and BART are currently working in coordination with the Fare Programs Staff Working Group to develop a memorandum of understanding (MOU) for the Pilot, which will formalize the policy framework adopted by the Task Force. The project team

expects to return to the Task Force in the winter of 2023/24 to seek approval of the MOU and to subsequently submit the MOU to transit agencies for signature by May 2024.

Issues:

None identified.

Recommendations:

Information Item Only.

Attachments:

- Attachment A: PowerPoint



Michael Eiseman, Co-Project Manager, BART



William Bacon, Co-Project Manager, MTC



MTC - Nichol Bergner

MTC - William Bacon

Update on No-Cost/Reduced-Cost Interagency Transfer Pilot

Fare Integration Task Force

October 23, 2023 Agenda Item 4a



No-Cost & Reduced Cost Interagency Transfer Policy Pilot



“When you make a trip that requires transferring between transit agencies, pay the full fare on just the first agency you use.

Any transfer to another agency within two hours of the first boarding is discounted up to a limit of \$2.50* per transfer”.

*When making an inter-agency transfer, customers using Clipper receive a discount equivalent to the single-ride Clipper fare for amounts up to the region’s highest local transit fare (currently \$2.50). This amount may change based on anticipated local agency fare adjustments.

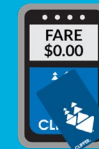


- Launching in 2024 with Next Generation Clipper
- Significant opportunity to promote ridership growth (+27,000 riders per day)
- Major benefits to low-income riders, who make the majority of trips involving interagency transfers

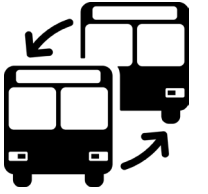
Path to Launch for Customers



- 18-24 month pilot + policy framework endorsed by Fare Integration Task Force in March 2023
- Cost of increased transfer discount to be reimbursed by MTC with \$22 million in Transit Transformation Action Plan funds, per the adopted policy framework
- Project team is working on a MOU, for operator and MTC approval, to formalize the policy framework
 - Questions about impacts to paratransit fares
 - Fare Programs Staff Working Group is reviewing MOU
- Expect Task Force to consider the MOU this winter
- Transit agency approval of MOU in the Spring of 2024
- Summer 2024: Launch for customers as a part of Next Generation Clipper®



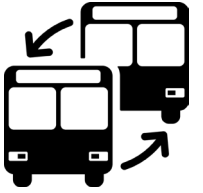
Major Opportunities in 2024



- Next Generation Clipper® + fare integration are transformative improvements for transit riders
- Project team and Clipper® staff see an opportunity to spotlight the major policy change the *No-Cost & Reduced Cost Interagency Transfer Policy Pilot* will offer riders in marketing and customer information
- “Now ride AC Transit for FREE when you transfer to or from BART or the SF Bay Ferry”
- “Need to take SamTrans *and* VTA to get where you’re going? Now you’ll only pay one fare to ride for two hours on both agencies”



Next Steps



- Project team will return to the Task Force with an update and possible request for endorsement on the MOU for the *No-Cost & Reduced Cost Interagency Transfer Policy Pilot* this winter
- Pilot is only funded for 18-24 months, so evaluating ridership growth potential and identifying necessary funding to support this user benefit will likely be a key topic of discussion in 2024



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 23-1183 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 9/1/2023 **In control:** Fare Integration Task Force
On agenda: 10/23/2023 **Final action:**
Title: Clipper BayPass Project Update

Project staff will present an update on work underway to allow for Clipper BayPass Phase 1 pilot educational and affordable housing participant institutions to remain in the program beyond June 30, 2024 under similar terms to the Clipper BayPass Phase 2 pilot participation agreement.

Sponsors:

Indexes:

Code sections:

Attachments: [4b 23-1183 Summary Sheet Clipper BayPass](#)
[4bi 23-1183 Clipper BayPass Presentation](#)
[4bii Joint Comment letter Clipper BayPass Pilot Phase 2](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper BayPass Project Update

Project staff will present an update on work underway to allow for Clipper BayPass Phase 1 pilot educational and affordable housing participant institutions to remain in the program beyond June 30, 2024 under similar terms to the Clipper BayPass Phase 2 pilot participation agreement.

Presenter:

Terence Lee, MTC, Ryan Reeves, BART and Jimmy Mahady, BART

Recommended Action:

Information

Attachments:

Clipper® Executive Board Fare Integration Task Force

October 23, 2023

Agenda Item 4b

Clipper® BayPass Pilot Update

Subject:

Project staff will present an update on the Clipper BayPass Pilot including initial findings from the first year of the Pilot as well as on work underway to allow for Clipper BayPass Phase 1 Pilot educational and affordable housing participant institutions to remain in the program beyond June 30, 2024 under similar terms to the Clipper BayPass Phase 2 pilot participation agreement.

Background:

In November 2021, the Fare Integration Task Force adopted the Fare Policy Vision Statement directing staff to pilot a regional institutional pass product. In August 2022, the first phase of the Clipper® BayPass pilot was launched to pilot an unlimited-use product at four higher education institutions – the University of California, Berkeley (UC Berkeley), San Francisco State University (SFSU), San Jose State University (SJSU), and Santa Rosa Junior College (SRJC) – and at 12 MidPen affordable housing properties. At UC Berkeley, SFSU and SJSU, the BayPass was made available to approximately 25% of eligible students. At SRJC and MidPen, all students (up to 5,000) and residents were eligible to receive the Clipper BayPass. Each of these institutions had a preexisting arrangement to provide transit passes to their students or residents, and the BayPass was provided at no additional cost.

Phase 1 of the pilot is scheduled to end on June 30, 2024. Preliminary evaluation of travel data and participant surveys has been positive, and participating institutions have expressed a desire to continue in the program. Accordingly, the project team has developed a preliminary proposal to offer Phase 1 institutions the ability to purchase Clipper BayPass for all their students and/or residents. The price, still under development, will be set with the goal of cost neutrality relative to transit trips taken with the BayPass and similar to the Participation Agreement for Clipper BayPass Phase 2, which the Task Force endorsed in August 2023. The project team continues to be engaged with staff from transit operators and Phase 1 institutions on this preliminary proposal

and will return to the Fare Integration Task Force with updates and recommendations as they become available.

Issues:

None identified.

Recommendations:

Information Item Only.

Attachments:

- Attachment A: PowerPoint



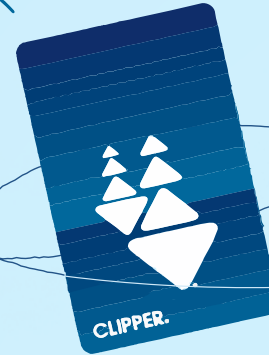
Michael Eiseman, Co-Project Manager, BART



William Bacon, Co-Project Manager, MTC



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BayPass



Clipper BayPass Project Update
Fare Integration Task Force
October 23, 2023 Agenda Item 4b

Agenda

1. Phase 1 Evaluation
2. Phase 1 Continuation
3. Phase 2 Updates





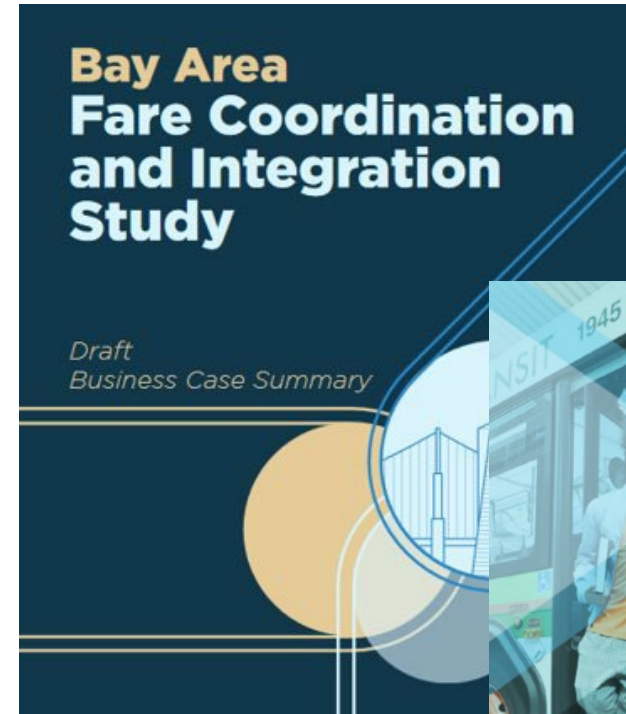
Phase 1 Interim Evaluation



Clipper BayPass Objectives



- Understand how an all-agency transit pass may better meet the needs of transit riders and institutions/employers
- Understand how an all-agency transit pass may increase transit ridership and support regional climate change and sustainability goals
- Evaluate pilot impacts to inform a permanent program



Clipper BayPass Phase 1 Overview

Pilot with University Students & Affordable Housing Residents

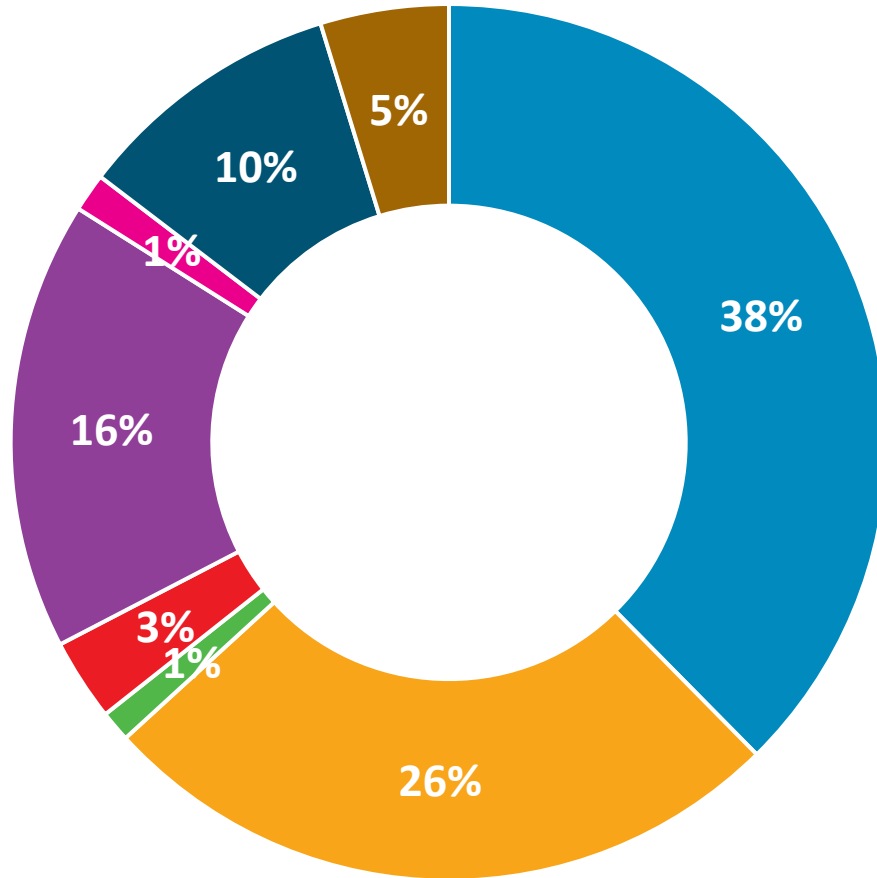
- 50,000 eligible residents at 4 universities/colleges and 12 affordable housing properties
- BayPass randomly assigned to some students at SFSU, SJSU, and UCB
- All individuals offered BayPass at SRJC and MidPen



More than 2 Million Trips Taken



BayPass Trips by Operator



“I can go from school to work to my home without having to worry about refilling my Clipper and counting how much money I’ve spent on it.”

“I really like how convenient it is to have all the public transportation options in one card.”

“I love the Clipper BayPass. It makes commuting so much easier and more convenient than using a regular Clipper card.”

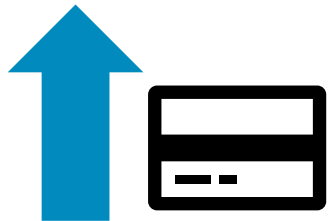
■ AC Transit ■ BART ■ Caltrain ■ SamTrans ■ SF Muni ■ SMART ■ VTA ■ Other

Clipper BayPass Pilot Tips – Preliminary Data 8/15/2022 to 8/17/23

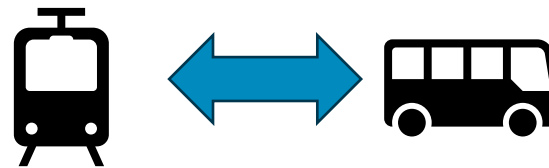
Interim Evaluation Takeaways After Year 1 (Universities)

Travel activity data shows that BayPass increases:

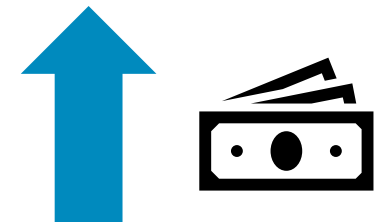
Public Transportation
Usage



Transfers between
Operators



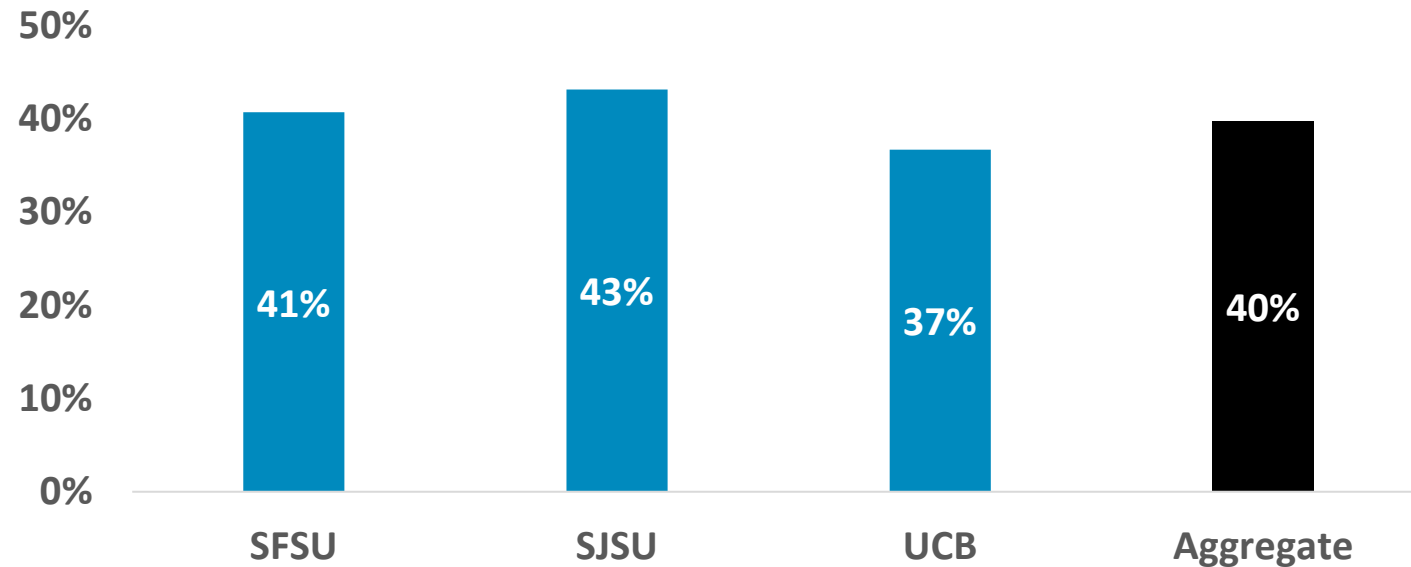
Average Fare





BayPass Increases Public Transportation Usage

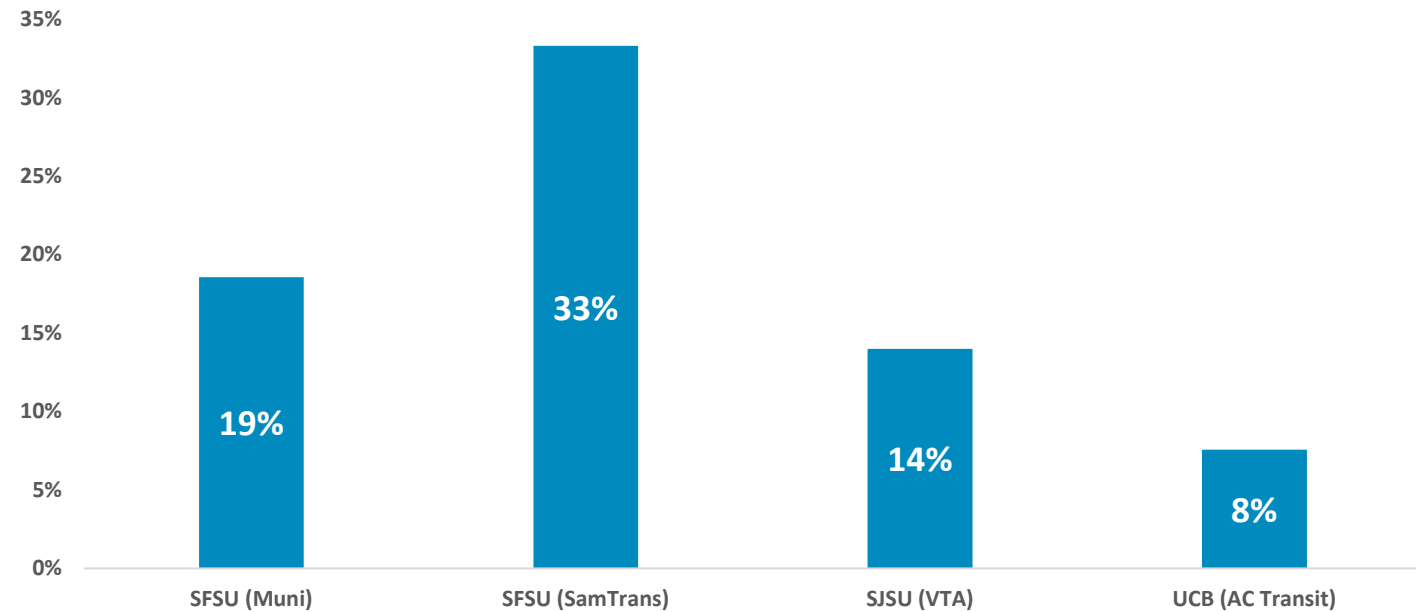
Increase in Average Total Number of Public Transportation Trips per Card due to BayPass





BayPass Increases Public Transportation Usage

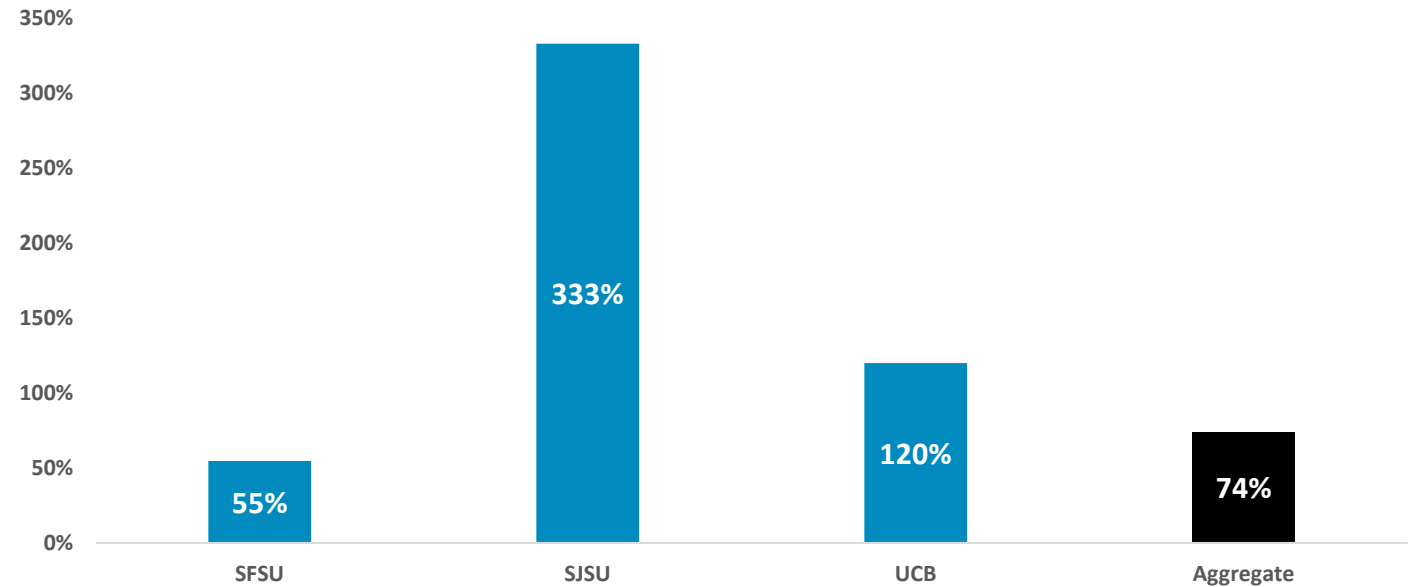
Increase in Average Total Number of Public Transportation Trips per Card (for Existing Institutional Pass Operator) due to BayPass





BayPass Increases Transfers Between Operators

Increase in Average Number of Transfers between Operators per Trip due to BayPass

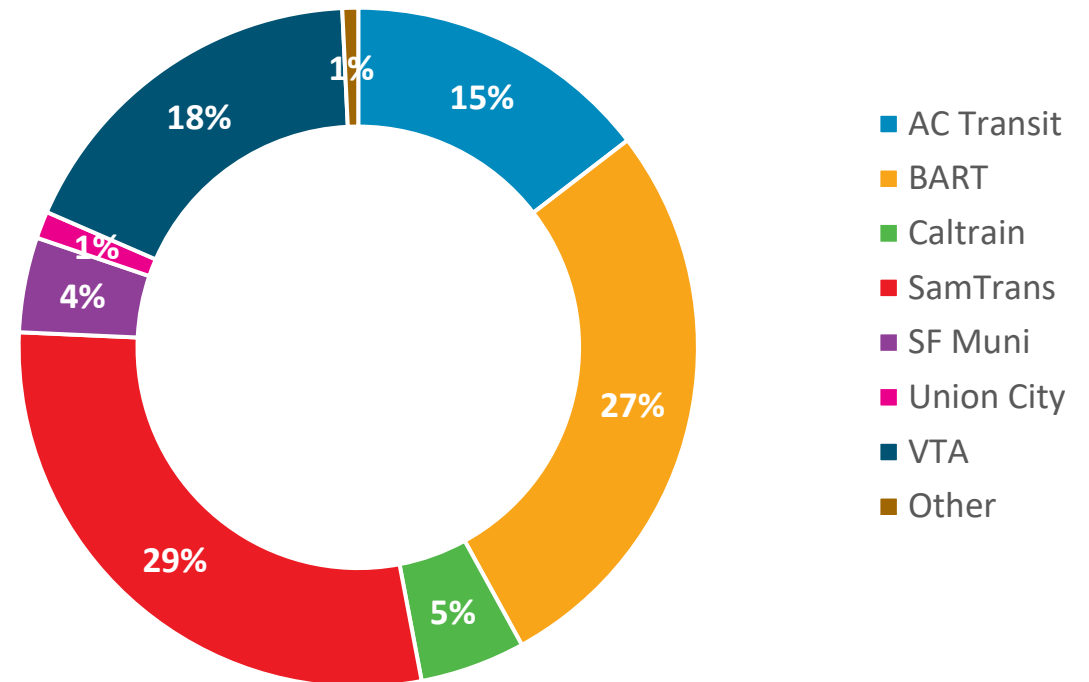


MidPen Housing: Highlights



- More than 2,200 residents are eligible for BayPass in Alameda, Santa Clara and San Mateo Counties
- ~900 residents have picked up BayPass (40% of eligible)
- More than 60,000 trips taken across 12 properties
- MidPen BayPass card users make ~17 transfers between operators per year
- 70% of residents surveyed strongly agreed that since receiving BayPass they are more likely to take public transit

MidPen Trips Taken by Operator

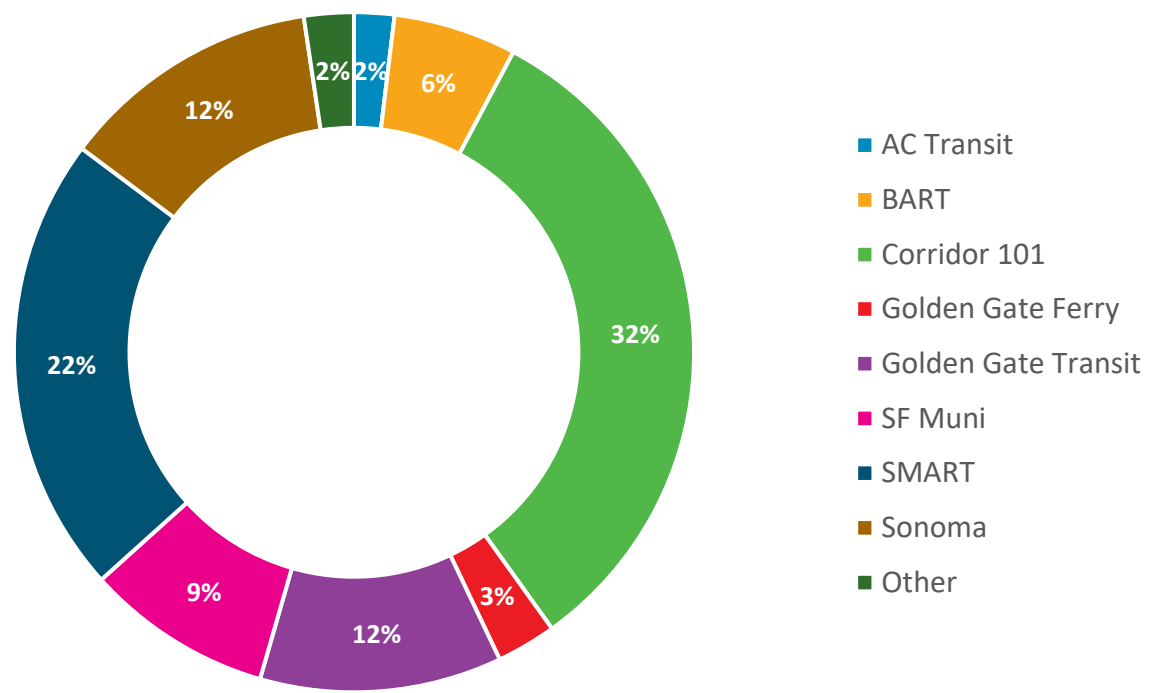


Trips by operator on BayPass at MidPen Housing November 1, 2022 through August 17, 2023

Santa Rosa Junior College: Highlights

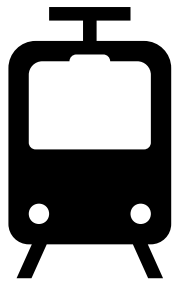
- 5,000 students eligible for BayPass
- More than 2,500 students are using BayPass
- More than 140,000 trips taken in first year
- On average, 60 trips per active card in first year

SRJC Trips Taken by Operator



Trips by operator on BayPass August 2022 through August 17, 2023

BayPass makes traveling simpler, easier and more affordable



“I love the Clipper BayPass. I would not be able to afford commuting to school without it. It makes commuting so much easier and more convenient.”
– *SFSU Student*

What's Next for the BayPass Evaluation?

A full Phase 1 evaluation report will be available in Fall 2024, including results from:

- Conducting two additional surveys (Fall 2023 and Spring 2024)
- Analyzing attitudes and perceptions from surveys
- Evaluating BayPass impacts by:
 - demographic groups
 - impacts on mode share and parking and associated sustainability impacts
- Focus groups on administration



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BayPass

Phase 1 Continuation



BayPass Phase 1 - Continuation



Overall Approach

Phase 1 continuation aims to offer existing institutions to purchase BayPass for all eligible students and residents to extend the pilot for an additional 1-2 years until a full post-pilot program can be developed



BayPass Phase 1 - Continuation



Summary of project team preliminary recommendations

Scale

- Offer BayPass for purchase to existing institutions for all eligible students/residents at existing institutions
- Does not require limiting the BayPass to a random sample

Pricing

- Offer pricing to institutions to purchase BayPass with a goal of revenue-neutrality

Approvals

- PM develop an amendment to Participation Agreement
- Operators seek Board or GM approvals for addendum (which will follow the terms of existing Participation Agreement); aim for approvals in early 2024

BayPass Phase 1 - Continuation



Summary of project team preliminary recommendations

Contracts

- Institutions maintain existing single agency agreements
- MTC to hold contract for BayPass as an add-on to existing institutional agreements

Administration

- Continue to be managed by a combination of PM team, institution staff, and operator staff

Evaluation

- Continue to monitor and evaluate impacts of expanding pilot participation

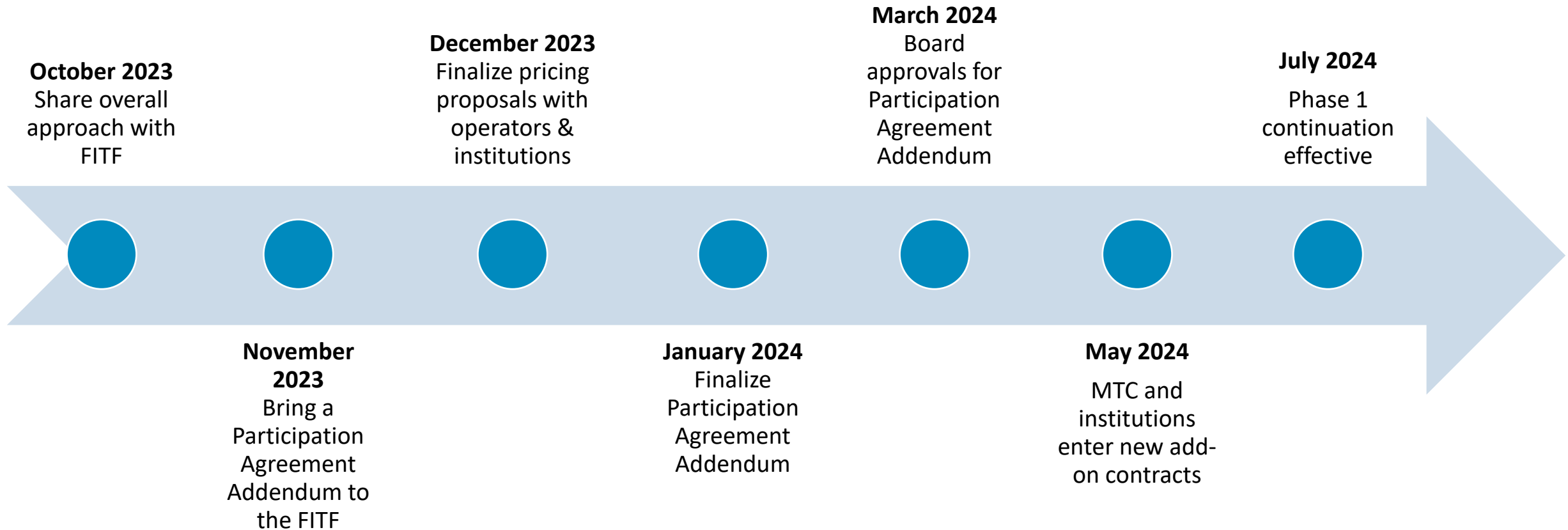
Acknowledging Challenges



Key Policy Questions to Consider for Future

- Existing single agency institutional pricing may not fully recover the cost of transit in all cases
- Institutional pricing varies by location
- What does “revenue-neutral” mean for students and affordable housing residents? (i.e., Clipper Adult fare only, Adult fare with justifiable discount rate, Clipper Start fare, incorporate BayPass effect factor, etc.)

BayPass Phase 1 - Continuation



Post-Pilot Expansion



Background

- Universities that did not participate in pilot continue to reach out for purchasing BayPass

Proposal

Complete Year 1 Interim Evaluation of Pilot Phase (Fall 2023)

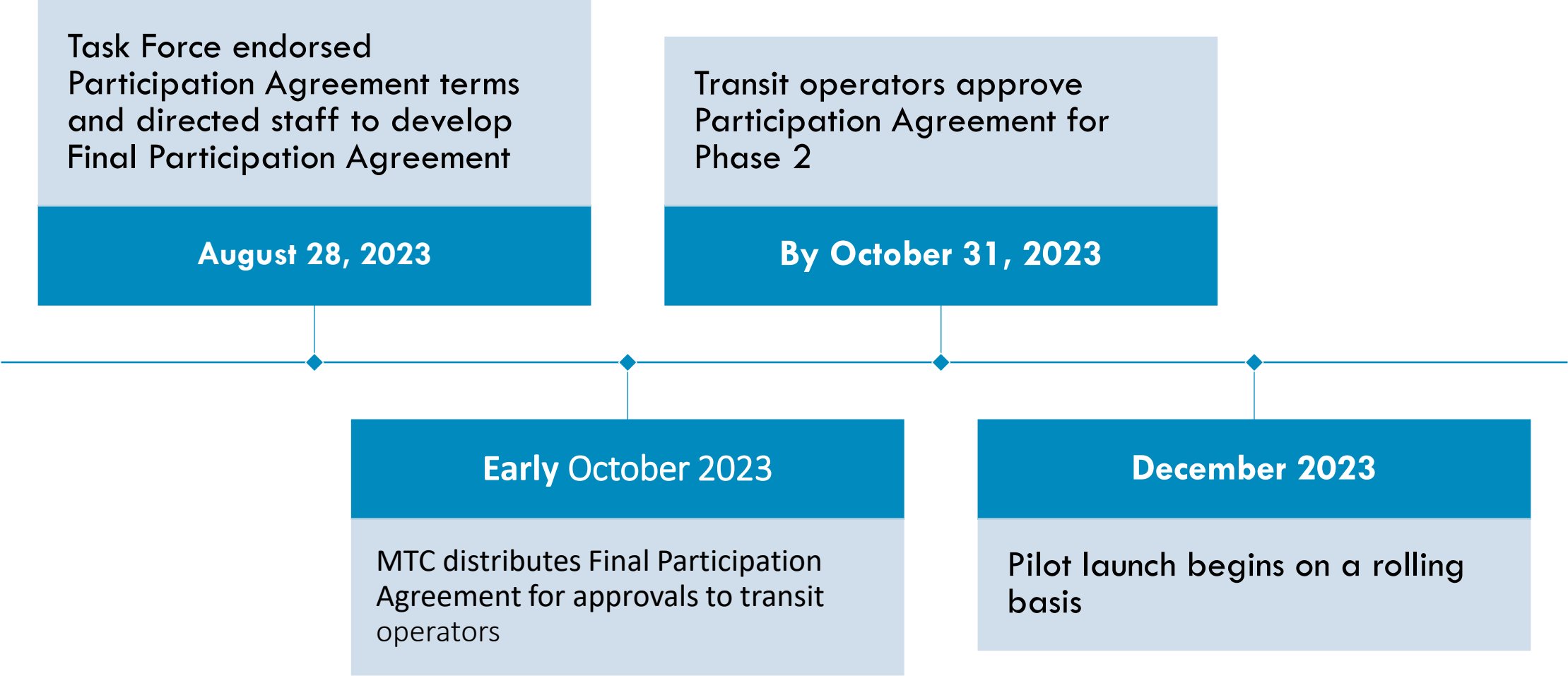
- Develop proposals for a post-pilot expansion through direction from the FITF (Spring 2024)
- Open process for interested institutions to apply to participate in and purchase passes through a post-pilot program (Fall 2024)
- Launch a post-pilot program (Fall 2025)



Phase 2 Reminders



Milestones for Launching Employer Pass Pilot in 2023



Phase 2 – Operator Next Steps



By October 31, 2023

- Please share your agency's approval of the Final Participation Agreement (via DocuSign to be distributed by MTC)
- Agency approval requirements should be determined by operator staff, and may range from General Manager approval to Board Action
- For questions, please contact tplee@bayareametro.gov and ryan.reeves@bart.gov

Thank you!

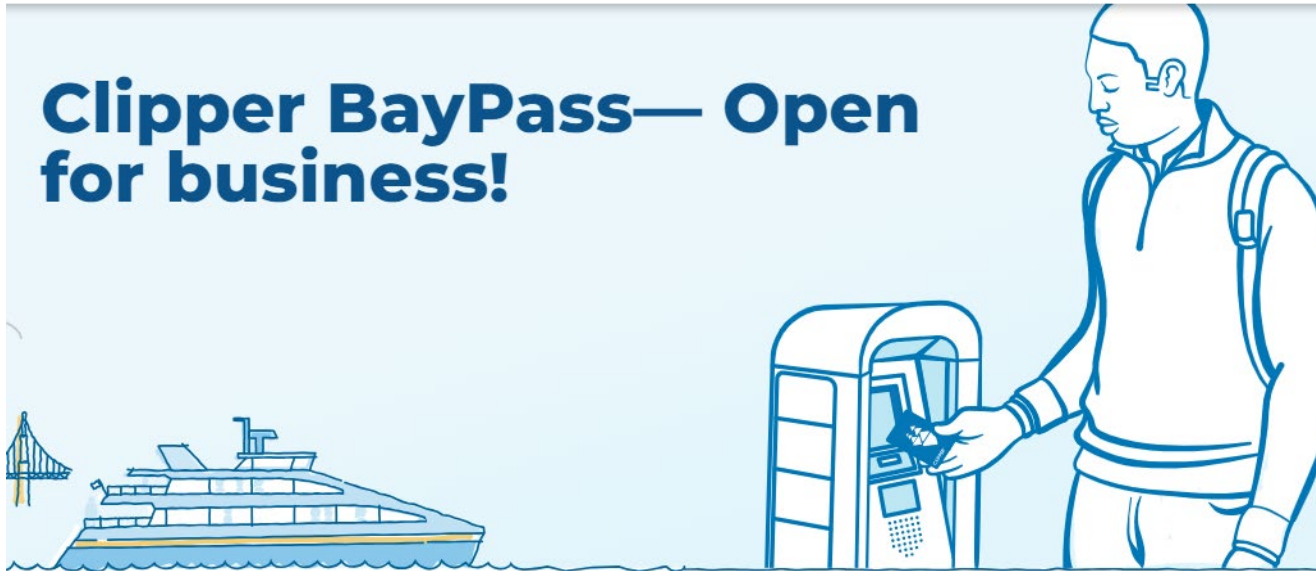


For Employers

For Employees

Interest Form

Clipper BayPass— Open for business!



Unlimited transit across the Bay Area!

Clipper BayPass gives your employees unlimited travel on all Bay Area transit services — bus, rail and ferry.

For more information
please visit:

<http://clipperbaypass.com>



October 20, 2023

Dear Fare Integration Task Force members, Transit Agency Board Members, and MTC Commissioners,

Thank you very much for advancing the Clipper BayPass all-agency transit pass pilot, expanding from the initial participant base of public higher education and affordable communities to include up to 10 employers and transportation management associations with up to 20,000 participants.

We are very pleased to see the dramatic success of the first phase of the BayPass pilot showing a 35% increase in transit ridership among people whose access was expanded from a single agency to all agencies, improving mobility for people, helping the transit system regrow ridership, and advancing our region's goals on climate, equity and congestion relief.

Our organizations strongly believe that an all-agency institutional pass is one of the fastest and most meaningful options available to the region to regrow transit ridership and expand access to the transit system. While we are glad that this next phase of the pilot is advancing we urge MTC and transit operators to maintain their focus on this effort and to work expediently toward a full scale launch and region-wide formalization of the BayPass program as soon as possible. We understand that this will require formalizing a pricing and revenue distribution structure for the program as well as addressing long term implications for existing institutional pass programs.

We are confident that MTC and operators can come together to creatively overcome these implementation hurdles without further delay or compromise to the overall program. The need to rebuild ridership and strengthen public trust in the region's transit system is an imperative and mutual responsibility that all operators share. Transit is not on a sustainable course and the need for public investment in the system has never been greater- showing that we have the capacity to work together and change is essential.

Thank you for your consideration,

John Ristow
**San Jose Department of
Transportation**

Amy Buckmaster
Chamber San Mateo County

Alyssa Sherman
Salesforce

Ian Griffiths
Seamless Bay Area

Amy Thomson
TransForm

Laura Tolkoff
SPUR

Tiffany Rodriguez
**San Jose State Associated
Students**

Dave Sorrell
**Association of Commuter
Transportation**

Adina Levin
Friends of Caltrain

Ewan Barker Plummer
**San Francisco Youth
Commission**

**Sonoma County Climate
Activist Network**

Russell Hancock,
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Bay Area Council