



Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Agenda

Regional Network Management Customer Advisory Group

Adina Levin, Chair
Warren Cushman, Vice Chair

Friday, February 23, 2024

1:00 PM

Board Room - 1st Floor

The Regional Network Management Customer Advisory Group is scheduled to meet on Friday February 23, 2024 at 1:00 p.m.

This meeting shall consist of a simultaneous teleconference call at the following location(s):
500 metros, Este del Canopy, Calle, Montezuma-Delicias Rd, Provincia de Puntarenas, Montezuma, 60111, Costa Rica

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/89140000203>

iPhone One-Tap: US: +13462487799,,89140000203# US (Houston)
+16694449171,,89140000203# US

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)

Webinar ID: 891 4000 0203

International numbers available: <https://bayareametro.zoom.us/j/89140000203>

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<https://bayareametro.zoom.us/j/89140000203>

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

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Clerk: Wally Charles

Roster

Adina Levin, Chair; Warren Cushman, Vice Chair

Bob Allen, Hillary Brown, Zack Deutsch-Gross, Anne Olivia Eldred, Dylan Fabris, Gerry Glaser,
Ian Griffiths, Dwayne Hankerson, Wendi Kallins, Corina Lieu, Emily Loper, Emily Martinez,
Sebastian Petty, Phillip Pierce, Terry Scott, Brian Stanke, and Amy Thomson

1. Call to Order / Roll Call / Confirm Quorum

A quorum of the Commission shall be a majority of its voting members (10).

2. Compensation Announcement (Clerk)

3. Consent Calendar

- 3a. [24-0221](#) Minutes of the January 26, 2024 Meeting
- Action:** Board Approval
- Attachments:** [3a_01_26_2024_RNM_Customer_Advisory_Group_Draft_Minutes](#)

4. Approval

- 4a. [24-0223](#) Annual Work Plan Development
- Proposed 2024 work plan for the Regional Network Management (RNM) Customer Advisory Group.
- Action:** Approval
- Presenter:** Ky-Nam Miller, MTC
- Attachments:** [4a_Annual_Work_Plan_Development](#)

5. Information

- 5a. [24-0303](#) Clipper START Pilot Program Update
- Staff will provide an update on the Clipper START Pilot Program to grow and evolve the Program.
- Action:** Information
- Presenter:** Judis Santos, MTC
- Attachments:** [5a_Clipper_START_Summary_Sheet](#)
[5ai_Clipper_START_Update_Attachment_A](#)
[5aii_Attachment_B](#)

5b. [24-0224](#) Fare Integration Updates

Progress update on the Clipper BayPass pilot and Reduce/No-Cost Transfer Policy.

Action: Information

Presenter: Terrence Lee, MTC and Michael Eiseman, BART

Attachments: [5b Fare Integration Update Memo](#)

[5bi Fare Integration Update Presentation Attachment A](#)

6. Public Comment / Other Business

*Customer Advisory Group members and 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.*

7. Adjournment / Next Meetings

The next meeting of the Regional Network Management Committee Customer Advisory Group will be held on Friday, April 26, 2024 at 1:00 p.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA. Any changes to the schedule will be duly noticed to the public.

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 Título 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 #: 24-0221 **Version:** 1 **Name:**

Type: Minutes **Status:** Consent

File created: 1/25/2024 **In control:** Regional Network Management Customer Advisory Group

On agenda: 2/23/2024 **Final action:**

Title: Minutes of the January 26, 2024 Meeting

Sponsors:

Indexes:

Code sections:

Attachments: [3a 01 26 2024 RNM Customer Advisory Group Draft Minutes](#)

Date	Ver.	Action By	Action	Result
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Subject:
Minutes of the January 26, 2024 Meeting

Recommended Action:
Board Approval

Attachments:



Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Minutes - Draft

Regional Network Management Customer Advisory Group

Adina Levin, Chair
Warren Cushman, Vice Chair

Friday, January 26, 2024

1:00 PM

Board Room - 1st Floor

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Attendee Link: <https://bayareametro.zoom.us/j/83731503443>

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+12532158782,,83731503443# US (Tacoma)

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888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)

Webinar ID: 837 3150 3443

International numbers available: <https://bayareametro.zoom.us/j/kdhj8jENFV>

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<https://bayareametro.zoom.us/j/kdR1hznEgA>

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

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Roster

Bob Allen, Hillary Brown, Warren Cushman, Zack Deutsch-Gross, Anne Olivia Eldred, Dylan Fabris, Gerry Glaser, Ian Griffiths, Dwayne Hankerson, Wendi Kallins, Adina Levin, Corina Lieu, Emily Loper, Emily Martinez, Sebastian Petty, Phillip Pierce, Terry Scott, Brian Stanke, and Amy Thomson.

1. Call to Order / Roll Call / Confirm Quorum

- Present:** 13 - Member Allen, Member Brown, Vice Chair Cushman, Member Deutsch-Gross, Member Fabris, Member Glaser, Member Griffiths, Member Hankerson, Member Kallins, Chair Levin, Member Petty, Member Scott, and Member Stanke
- Absent:** 6 - Member Eldred, Member Lieu, Member Loper, Member Martinez, Member Pierce, and Member Thomson

2. Compensation Announcement (Clerk)

3. Consent Calendar

Upon the motion by Member Glaser and seconded by Member Brown, the Consent Calendar was unanimously approved. The motion carried by the following vote:

Aye: 13 - Member Allen, Member Brown, Vice Chair Cushman, Member Deutsch-Gross, Member Fabris, Member Glaser, Member Griffiths, Member Hankerson, Member Kallins, Chair Levin, Member Petty, Member Scott and Member Stanke

Absent: 6 - Member Eldred, Member Lieu, Member Loper, Member Martinez, Member Pierce and Member Thomson

3a. [23-1454](#) Minutes of the October 27, 2023 Meeting

Action: Approval

Attachments: [3a 10 27 2023 RNM Customer Advisory Group Draft Minutes](#)

4. Approval

4a. [23-1458](#) Election of RNM Customer Advisory Group Chair and Vice Chair

Nomination and election of the Chair and Vice Chair of the RNM Customer Advisory Group.

Action: Approval

Presenter: Ky-Nam Miller

Attachments: [4a 23-1458 Summary Sheet RNM CustAG Chair ViceChair Elections](#)

Upon the motion by Member Scott and seconded by Member Stanke, the Nomination for Chair, Adina Levin and Gerry Glaser, and Vice Chair, Warren Cushman, was closed. The motion carried by the following vote:

Aye: 13 - Member Allen, Member Brown, Vice Chair Cushman, Member Deutsch-Gross, Member Fabris, Member Glaser, Member Griffiths, Member Hankerson, Member Kallins, Chair Levin, Member Petty, Member Scott and Member Stanke

Absent: 6 - Member Eldred, Member Lieu, Member Loper, Member Martinez, Member Pierce and Member Thomson

The Customer Advisory Group voted to elect Member Adina Levin as Chair of the Regional Network Management Customer Advisory Group, with the following vote:

Member Adina Levin-11: Member Allen, Member Brown, Member Cushman, Member Deutsch-Gross, Member Fabris, Member Griffiths, Member Hankerson, Member Kallins, Member Levin, Member Petty and Member Stanke.

Member Gerry Glaser -2: Member Glaser and Member Scott

Absent-6: Member Eldred, Member Lieu, Member Loper, Member Martinez, Member Pierce and Member Thomson

The Customer Advisory Group voted to elect Member Warren Cushman as Vice-Chair of the Regional Network Management Customer Advisory Group, by the following vote:

Aye-13: Member Allen, Member Brown, Member Cushman, Member Deutsch-Gross, Member Fabris, Member Glaser, Member Griffiths, Member Hankerson, Member Kallins, Member Levin, Member Petty, Member Scott and Member Stanke.

Absent-6: Member Eldred, Member Lieu, Member Loper, Member Martinez, Member Pierce and Member Thomson

5. Information

5a. [23-1453](#) Regional Mapping and Wayfinding Project Update

Update on the development of prototype signage for the Regional Mapping & Wayfinding Project (RWMP).

Action: Information

Presenter: Gordon Hansen, MTC and Jumana Nabti, BART

Attachments: [5a_23-1453_Draft RNM CustAdvGrp RMWP Project Update](#)
[5ai_23-1453_Attachment A.pdf](#)

The following individuals spoke on this item: Aleta Dupree

5b. [23-1457](#) Transit Transformation Action Plan Two-Year Status Update

Update on the overall implementation status of near-term actions identified in the Transit Transformation Action Plan (TAP).

Action: Information

Presenter: Allison Quach

Attachments: [5b_23-1457_Transit_Transformation_Action_Plan_Two-Year_Status_Update](#)
[5bi_23-1457_Attachment_A](#)
[5bii_23-1457_Attachment_B](#)

The following individuals spoke on this item: Aleta Dupree

6. Public Comment / Other Business

The following individuals spoke on this item: Aleta Dupree

7. Adjournment / Next Meetings

The next meeting of the Regional Network Management Customer Advisory Group will be held on Friday, February 23, 2024 at 1:00 p.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA. Any changes to the schedule will be duly noticed to the public.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0223 **Version:** 1 **Name:**

Type: Action Item **Status:** Committee Approval

File created: 1/25/2024 **In control:** Regional Network Management Business Case Progress Update

On agenda: 2/23/2024 **Final action:**

Title: Annual Work Plan Development

Proposed 2024 work plan for the Regional Network Management (RNM) Customer Advisory Group.

Sponsors:

Indexes:

Code sections:

Attachments: [4a Annual Work Plan Development](#)

Date	Ver.	Action By	Action	Result
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Subject:

Annual Work Plan Development

Proposed 2024 work plan for the Regional Network Management (RNM) Customer Advisory Group.

Presenter:

Ky-Nam Miller, MTC

Recommended Action:

Approval

Attachments:

Regional Network Management Customer Advisory Group

February 23, 2024

Agenda Item 4a

Annual Work Plan Development

Subject:

Proposed 2024 Work Plan for the Customer Advisory Group

Background:

In February of 2023, the Metropolitan Transportation Commission (Commission) approved the Regional Network Management (RNM) framework, which included a structure for carrying out the objectives of the regional network management program (MTC Resolution No. 4564). As described in the Customer Advisory Group's charter (MTC Resolution No. 4610), the purpose of the Customer Advisory Group is to provide diverse customer perspectives to the RNM Committee to help shape regional transit policy and implementation planning, focused on topics identified in its Work Plan. The following goals were proposed at the Customer Advisory Group's inaugural meeting in October 2023 to anchor its Work Plan:

- 1) Contribute to inclusionary and balanced outcomes leveraging the diverse community perspectives represented on the Customer Advisory Group;
- 2) Applying the principles laid out in MTC's Equity Platform as well as the Equity Principles adopted by the Blue Ribbon Task Force;
- 3) Continually provide input throughout all stages of RNM projects and programs; and
- 4) Discuss and engage in a comprehensive and constructive manner that allows the full Policy Advisory Council to deliver on its large portfolio of work and engage in the RNM at a broader level.

The RNM Committee will identify priority areas in which it desires feedback and/or deeper inquiry from the Customer Advisory Group. Customer Advisory Group leadership is also given the opportunity to recommend priority areas to the RNM Committee for inclusion in the work plan. Depending on the nature of discussions, some items may also be presented to the full Policy Advisory Council or the Equity and Access Subcommittee. MTC staff will coordinate with Policy Advisory Council and subcommittee chairs to determine the appropriate committee to which specific discussion and updates should be brought.

In advance of this Annual Work Plan discussion, RNM Committee Chair Rabbitt, Vice Chair Noack, Customer Advisory Group Chair Adina Levin, and Vice Chair Warren Cushman will meet on February 20 to discuss and identify focus areas in the coming year that align with the RNM Committee's priorities. The main topics proposed for that discussion include:

- Fare Integration & Coordination (including Clipper START¹)
- Regional Mapping & Wayfinding
- Transit Priority
- Transit 2050+²
- Access & Mobility Work Plan¹
- Transit Transformation Action Plan Update
- RNM Performance Measures

This meeting will provide an opportunity to discuss these proposed Work Plan topics with the goal of establishing a 2024 Work Plan that allows the Customer Advisory Group to be most effective in its advisory role to the RNM Committee.

Issues:

None identified.

Recommendations:

Staff recommends that the Customer Advisory Group vote to adopt the proposed Work Plan.

Attachments: none

¹ May also be presented to the Equity and Access Subcommittee.

² May also be presented to the full Policy Advisory Council.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0303 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 2/13/2024 **In control:** Regional Network Management Customer Advisory Group

On agenda: 2/23/2024 **Final action:**

Title: Clipper START Pilot Program Update

Staff will provide an update on the Clipper START Pilot Program to grow and evolve the Program.

Sponsors:

Indexes:

Code sections:

Attachments: [5a Clipper START Summary Sheet](#)
[5ai Clipper START Update Attachment A](#)
[5aii Attachment B](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper START Pilot Program Update

Staff will provide an update on the Clipper START Pilot Program to grow and evolve the Program.

Presenter:

Judis Santos, MTC

Recommended Action:

Information

Attachments:

Regional Network Management Customer Advisory Group

February 23, 2024

Agenda Item 5a

Clipper START Pilot Program Update

Subject:

Status of Clipper START Pilot Program to grow and evolve the Program

Background:

Clipper START is a Bay Area regional transit fare-discount program, providing eligible adults aged 19 – 64, earning a low-income at or below 200% Federal Poverty Level, a 20% or 50% single-ride fare discount on participating Bay Area transit agencies. MTC together with transit operators and community partners are working to remove fare-related barriers to using public transit experienced by people earning lower incomes. The Clipper START Program began as a Pilot with four participating transit operators in July 2020 (Phase 1); and an additional 17 transit operators joining the program in August 2020 (Phase 2).

In June 2023, MTC extended the Pilot to June 30, 2025 and updated the subsidy approach, providing operating assistance payments as a one-time lump sum payment rather than an ongoing reimbursement (MTC Resolution No. 4320, Revised). In addition, the twenty-one participating operators supported providing a 50% discount (an increase from seven operators offering a 50% discount) and Santa Clara Valley Transportation Authority (SCVTA) agreed to join the program (Phase 3). Starting in January 2024, all twenty-two Clipper-system operators are offering a 50% fare discount. This growth in transit operator voluntary participation demonstrates the collective goal to improve customer experience, increase ridership, and provide a greater and more consistent discount to program participants.

Today's item provides an update on the performance of Clipper START and highlights Phase 3 actions to further evolve and grow the program.

Phase Three: Evolving and Growing the Program

Applying MTC's Equity Platform (MTC Resolution No. 4955), the Clipper START Pilot completed a two-year, third-party evaluation to "define and measure" and "listen and learn." Results identified a range of potential strategies to be implemented to increase participation

(uptake) in the program, improve customer experience, and decrease program costs. These strategies fall into three broad categories:

- Design and implement a customer-focused marketing campaign grounded in engagement, education, and equity partnerships;
- Improve the product for better customer experience; and
- Simplify and broaden access to the Clipper START benefit.

The strategies and range of options advancing for preliminary assessment, evidence-based, and **potentially** implementable program elements are listed in Attachment B and include:

1) Ways to simplify and make it easier for customers to participate:	Auto-enrollment (with customer consent); Self-verification
2) Broadening access by adjusting the income level of measurement:	Eligibility Threshold
3) Improving the product for better customer experience:	Fare-capping

Strategies Being Implemented

The Pilot experienced slow growth in the first two years, but growth increased in the third year. Year three statistics (in comparison to Year two) were:

- 29,500 applications submitted, a 97% increase over the first two years
- 25,900 applications approved, a 99% increase
- 17,900 active users, an 83% increase
- 1.8 million trips taken, an increase of 155%
- 582,000 transfers, an increase of 133%

Staff are continuing to implement strategies to increase uptake such as all-agency participation and the unified 50% discount. In addition, marketing will continue to focus on Equity Priority Communities and provide multilingual advertising and materials. The spring 2023 campaign will be continued but will be boosted by additional efforts with transit operators, contracting directly with community-based organizations (who serve as hubs for outreach and assistance), and the development of new resources such as instructional videos.

Strategies being Assessed through a Coordinated Approach

Strategies identified above are potential responses to cross-cutting barriers to access being experienced on other MTC means-based, equity-oriented policies and programs. Staff's proposed internal agency approach is to address these barriers holistically, through a customer-centered, collective approach, instead of in isolation via project-by-project. This is to ensure internal means-based initiatives are coordinated, provide a common agenda for change, share measurements for data and results, provide mutually benefitting actions, and foster continuous communications. A six-to-eight-month technical analysis for means-based enrollment and eligibility threshold models is being launched in January 2024. This task is intended to focus on Clipper START, Express Lane START, and State Route 37, with an emphasis on how and where the policies for the projects align related to eligibility threshold(s) and enrollment models, potential partnership options with existing income-based program providers; and, adjusting the eligibility threshold in MTC's equity programs.

Next Steps

Next steps include continuous program monitoring and marketing improvements. Staff will provide an update on the draft findings of the technical analysis in summer 2024.

Issues: None identified.

Recommendations: Information.

Attachments:

- Attachment A: Presentation
- Attachment B: Preliminary Assumptions: Strategy Concepts in Development and Working Program Examples: Preliminary List



Growing the Clipper® START Pilot



Regional Network Management Customer Advisory Group

February 23, 2024

Agenda Item 5a Attachment A

Evolving and Growing the Pilot Program

Concept to Reality

(Phase 1: Done)

- Establish policy framework
- Transit agency support and partnership
- Subsidy program by MTC and operators

Foundational Program Structure and Initial Rollout

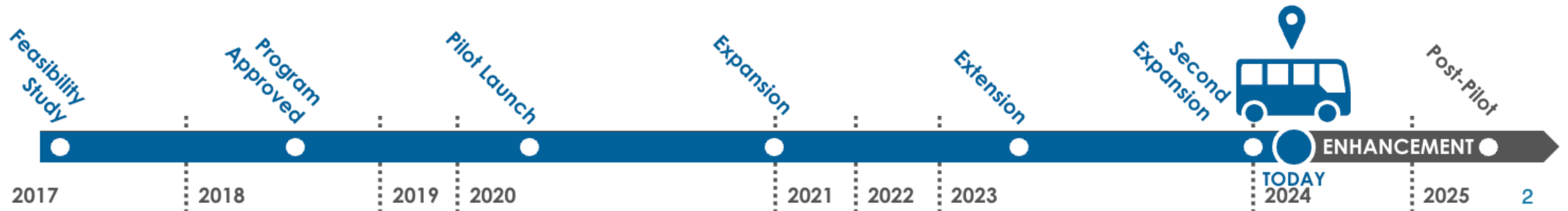
(Phase 2: Done)

- Set up system infrastructure, administrative processes
- Customer roll out
- Pilot evaluation

Grow the Program: Increase participation and reach

(Phase 3: Continuing and New)

- Consistent discount and agency participation
- Targeted marketing and outreach
- Remove barriers to sign up
- Continual process improvements



Applying the Pillars of MTC's Equity Platform



Define and Measure

Establish Goals and Metrics



Listen and Learn

Co-create



Focus and Deliver

Partner and Execute



Train and Grow

Use results to improve future policy and programs

We Are Here

Evolving and Growing the Program

Applying Stakeholder Feedback to "Phase 3"

Program Implementation

Phase 3 Assessment

Clipper START Pilot Program Framework

Goal:

Make transit more affordable for people with low incomes

Develop implementation options that are financially viable and administratively feasible

Move towards a more regional consistent standard for fare discounts



Pilot program
July 2020 - June 2025



Starting January 2024
50% Discount



Discount Subsidized jointly
by MTC and Transit Agencies



Centrally Administered on Clipper



Participant Eligibility:
Adult (19-64) riders at/below
200% Federal Poverty Level



Discount applied to single-ride adult fare

Clipper START Customer Statistics

Through November 2023

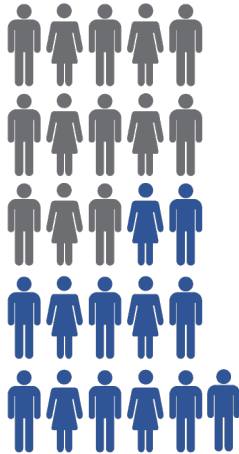
Applications Submitted
29K Total



Years 1 & 2

Year 3
+97%

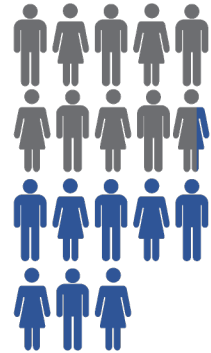
Program Enrollees
25K Total



Years 1 & 2

Year 3
+99%

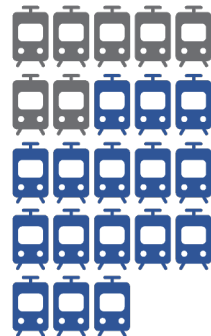
Active Program users
17.9K Total



Years 1 & 2

Year 3
+83%

Number of trips
2.8M Total



Years 1 & 2

Year 3
+155%

Number of transfers
582K Total



Year 3
+133%

Key

= 1,000 = 1,000 ea.

= 100,000 = 100,000



Factors Contributing to Driving Uptake

Strategies Being Advanced		Other Factors
<p>NEW</p> <p>Clipper-wide transit agency participation & 50% discount</p>	<p>Continuing Marketing and Outreach Efforts:</p> <ul style="list-style-type: none">• Equity Priority Community geographic targeting• Multilingual marketing materials	

Marketing and Outreach

- Continue effective campaign with input from marketing assessment
- Improved coordination with transit operators
- Contract with community-based organizations
- Develop new resources such as videos



Exploring Customer-Focused Strategies

Cross-Cutting Challenges in Means-Based Policies/Programs

- **Reaching Eligible Residents**
 - Auto-Enrollment (with customer consent)
 - Self-Verification
 - Marketing
- **Eligibility Threshold**
- **Product Improvement: Fare Policy**
- **Engagement**

Internal Means-Based Agency Coordination

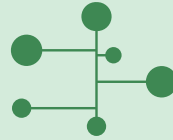
- **Regional Survey Results — Spring 2024**
 - Transit Passenger Snapshot Survey: Passenger habits, riders' demographics, frequency of trip-making, trip purposes
 - Travel Diary Study
- **Unified Benefits Portal – On-going**
 - One-stop-shop customer application for MTC's transportation benefit enrollment
- **Technical Analysis — January 2024 to summer 2024**

Technical Analysis

Range of Options for Each Strategy: Preliminary Assessment

How will this strategy impact:

- Ease for customer use and participation rate?
- Subsidy Needs?
- Regulatory challenges/authority?
- Timelines and cost?



Auto-enrollment

Enrollees in partner programs are enrolled into Clipper START (with customer consent)

- County level (e.g. CalFresh)
- State level (e.g. Medi-Cal)
- Transit Peer Agency Programs (e.g. SFMTA Lifeline)
- Automated cross-enrollment among MTC programs



Self-verification

Simplified eligibility verification process

- Expanded Automated Verification
- Community Based Organization (CBO) Peer Verification
- Open Self-Verification (Honor System)



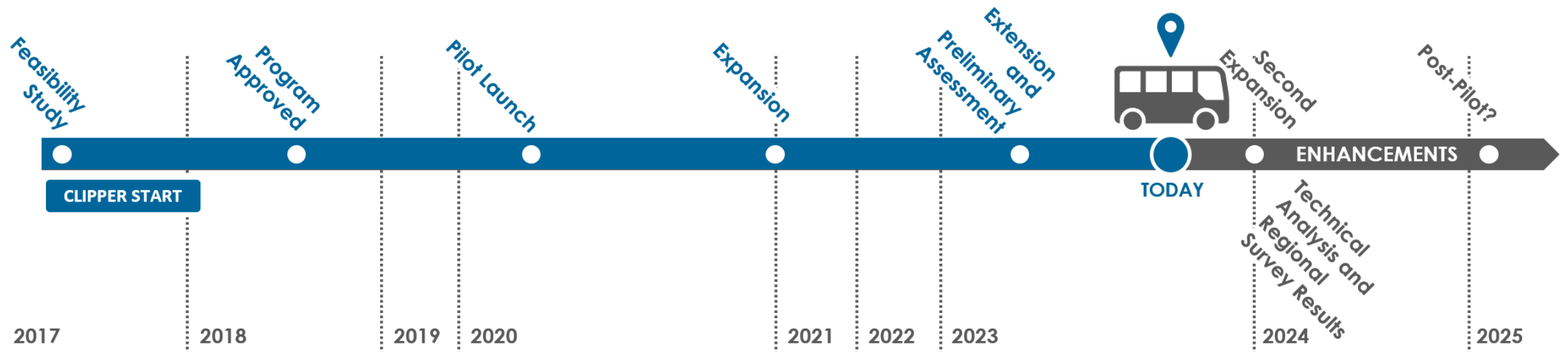
Eligibility Threshold (ET)

ET income level adjustment; ET definition

- Income level amount
- Federal Poverty Level vs. Area Median Income (County)

Next Steps

- Program monitoring
- Continuous improvement in marketing and outreach efforts
- Spring/summer findings from survey and technical analysis – to inform Program Enhancements



Agenda Item 5a Attachment B

Preliminary Assumptions: Strategy Concepts in Development

Strategy Concepts	What it is	Uptake	Impacts	Equity and Access	Implementation Considerations MTC / Agency Financial Implications
Auto-Enrollment					
A1 - County Partnerships (example used: CalFresh / EBT)	Upon successful application for CalFresh or electronic benefits transfer card, a Clipper START card will also be provided as part of the benefit package without need for additional application to MTC.	Uptake can expect to increase if Clipper START is added to the CalFresh package upon application. This will likely be achieved through including messaging about Clipper START to CalFresh outreach and communications.	There is significant overlap between the demographics who would be eligible for CalFresh and EBTs, and those who are most dependent on public transit. Given the wider awareness and popularity of CalFresh, auto-enrolling recipients with Clipper START can improve both uptake and uptake rates within the existing pool of eligible applicants.	Adding Clipper START to CalFresh may only impose limited cost burdens on MTC beyond initial set up costs. Some administrative costs associated with eligibility verification would be reduced, but the magnitude depends on what proportion of new applicants would be applying through CalFresh. Examples of additional MTC functions and costs may include inter-program coordination and fraud monitoring. Overall the cost impact would likely be neutral .	
	There were no existing examples of direct auto-enrollment for means based programs based on initial review of peer programs.				
	Upon successful application and receipt of a transit benefit at an identified peer transit agency in the Bay Area, recipients will also automatically receive a Clipper START card without need for additional application to MTC.	Uptake can be expected to marginally increase in the localized peer program area (i.e. San Francisco for LifeLine), but systemwide uptake improvements would not manifest unless MTC establishes auto-enrollment with all local agency programs across the nine counties.	Pairing Clipper START to a local transit agency program can be beneficial in simplifying the various Clipper programs and products available across the Bay Area. There is likely a sizeable overlap (clearly so with LifeLine) between populations eligible for a local means based transit benefit and Clipper START.	Cost impacts may be limited, with inter-program coordination and fraud monitoring being drivers of additional cost. Cost savings would likely also be limited as the pool of auto-enrolled applicants would be small relative to the overall eligible population. Overall the cost impact would likely be neutral .	
A2 - Transit Agency Partnerships (example used: Peer Agency Programs)	Upon successful application and receipt of Medi-Cal, a Clipper START card will also be provided as part of a benefit package without need for additional application to MTC.	Uptake can expect to increase if Clipper START is added to the Medi-Cal package upon application. This will likely be achieved through including messaging about Clipper START to Medi-Cal outreach and communications.	There is significant overlap between the demographics who would be eligible for Medi-Cal, and those who are most dependent on public transit. Given the wider awareness and popularity of Medi-Cal, auto-enrolling Clipper START can improve both uptake and uptake rates within the existing pool of eligible applicants.	Adding Clipper START to Medi-Cal may only impose limited cost burdens on MTC beyond initial set up costs. Some administrative costs associated with eligibility verification would be reduced, but the magnitude depends on what proportion of new applicants would be applying through Medi-Cal. Examples of additional MTC functions and costs may include inter-program coordination and fraud monitoring. Overall the cost impact would likely be neutral .	
	There were no existing examples of direct auto-enrollment for means based programs based on initial review of peer programs.				
A3 - State Partnerships (example used: Medi-Cal)					
Self-Verification					
S1 - Automatic Digital Verification	Use of financial services technologies to verify an applicant's eligibility, such as income. This alleviates the need for manual verification of documents, instead relying on automated processes to connect to external databases such as payroll providers, banking institutions, or tax files. Applicants would be required to have a digital financial presence, such as a bank account or electronic payroll.	This strategy can make application processes easier and less time consuming for those who can use the digital process; however on its own it does not widen the eligibility pool or significantly improve outreach. Coordinated marketing with the Cal-ITP project may help uptake, but overall the expected impact is more aligned to neutral .	Digital verification services, by definition, would require access to an electronic device whether by phone, tablet, personal or public computer. For income verification, electronic banking records, statements, or other documents would be necessary, which can be a barrier to unbanked individuals. These individuals will have to rely on existing manual verification processes.	Reducing the amount of manual verifications can significantly reduce administrative costs for MTC in operating the program, and defend against fraud.	
	An applicant's eligibility would be verified and "vouched for" by identified third party community based organizations (CBO), reducing the burden on MTC to conduct verification.	Uptake is likely to increase especially where CBOs can serve as local community liaisons to raise awareness and help applicants complete applications. The San Mateo 101 Express Lanes program leveraged the County's Core Service Agencies Network of local nonprofits and community organizations to reach individuals in need. In Q4 of FY2023, 2,426 benefits were issued where 81% (1,964) were Clipper cards containing \$100.	Automated digital verification can also improve accessibility if tied to platforms that have other benefit programs, reducing the need for multiple applications and helping centralize benefits in one place. CBOs typically have a deep understanding of their local communities, and have relationships and trust with community members that government agencies may not typically have. CBOs are important stakeholders in reaching those that may not be adequately engaged by agency outreach efforts, have language barriers, disabilities, or may simply be hesitant to engage with government. For equitable and effective implementation, this effort should be a true partnership with CBOs rather than using them as a vehicle for engagement; they should be involved in policy and planning conversations to co-create accessibility improvements and provide feedback on the program.	Digital verification services can be costly depending on the approach taken. Private companies that provide for banking institutions are likely to charge a premium for their background check services, but partnering with Cal-ITP may prove more cost effective and aligned with Clipper START's goals. Coordination between MTC and CBOs would be extensive; the precedent set by San Mateo 101 Express Lanes demonstrates that. Over 20 workshops and working sessions with a range of regional partners and CBOs were conducted, to build capacity and develop program administration protocols. These measures would likely be the main drivers of agency cost increases , with some savings from reduced eligibility verification responsibilities on MTC's part. CBOs were part of Clipper START program promotion and application assistance in the pilot phase, so some level of CBO network exists. However, could be leveraged more extensively.	
S2 - CBO Peer Verification					
S3 - Open Self-Verification (Honor System)	Applicants would self-declare on the application that their income falls below the eligibility threshold without any external review and verification.	Over time, self-verification has the potential to drastically increase uptake , depending on how marketing and outreach is conducted. This strategy could be the most high risk but also potentially highest reward approach in increasing uptake.	Self-verification removes many application barriers for those who need the benefit, particularly those who do not have access to income eligibility documents.	There is no way to accurately predict the magnitude of increases in both uptake and funding required to adequately operate a self-verification system that has been established and gained traction over time. The cost may also be unpalatable for some transit agencies and operators where passenger fare revenues comprise a larger proportion of their overall operating revenues. While overall administrative costs from eligibility verification would be significantly reduced , some application processing and verification would still be needed for proof of residence and other information besides income.	
Change Income Eligibility					
C1 - Universally at 400% of FPL	The eligibility threshold to participate in Clipper START would be universally increased to 400% of the Federal Poverty Level.	Uptake can be expected to increase substantially , however the <i>rate</i> of uptake may stay the same. Because this strategy widens the pool of eligible recipients as a source of increasing uptake, the <i>uptake rate</i> may not increase without commensurate marketing and outreach efforts.	More people would have access to Clipper START, but the eligibility verification processes would not change and many existing barriers to uptake would remain. From an equity standpoint, the implications are not too different from existing conditions. 400% of FPL is a common threshold for subsidised health insurance and federal tax credits, and there may be opportunities to collaborate on benefits outside of transportation.	Beyond the cost of subsidising more passes, administrative costs in manually verifying a larger number of applications would increase . Especially if the newly eligible applicants would not be eligible to apply through CalFresh or other benefits, the administrative burden of manual income verification would fall on MTC staff and budget.	
	The eligibility threshold to participate in Clipper START would be changed from a percentage of the Federal Poverty Level (FPL) to being below the median individual income for the applicant's county.	Uptake would likely increase as the AMI in the Bay Area is likely to be higher than the nationally determined FPL, but this would depend on what percentage of AMI is set to be the threshold.	The cost of living across the nine counties in the Bay Area differ, and adopting a county-specific income threshold would demonstrate sensitivity to the varied contexts and definitions of poverty. Especially in counties where the cost of living is much higher than the national average, this approach can be more equitable than a blanket federal poverty threshold.	Beyond the cost of subsidising more passes, administrative costs in manually verifying a larger number of applications would increase . Especially if the newly eligible applicants would not be eligible to apply through CalFresh or other benefits, the administrative burden of manual income verification would fall on MTC staff and budget.	
C2 - Area Median Individual Income Threshold (County-Specific)					

Working Program Examples: Preliminary List

Below is a running list of program examples from preliminary research, some general information about the program, the relevance to Clipper START, and links to relevant websites. Staff anticipates additions to this list.

Program	Agency	General Information / Eligibility	Relevance to MTC Clipper START	Links	Strategy Concept
LIVE	RTD (Denver, CO)	<ul style="list-style-type: none"> x. Be between the ages of 20 and 64 x. Be at or below 185% Federal Poverty Level x. Provide a valid address for your eligibility card x. Live in the RTD service area x. Supply gross household income verification x. Provide a recent photo 	<ul style="list-style-type: none"> x. Regional Program x. Adopts the Federal income poverty levels x. wide range of residents 	https://www.rtd-denver.com/LIVE#quality	A1 - County Partnerships, A3 - State Partnerships
RTC (Regional Transit Connection) - 511 Bay Area	MTC	<p>Applicants to the RTC program can choose to apply using either Basic or Medical eligibility.</p> <p>xx. Basic Eligibility:</p> <ul style="list-style-type: none"> x. Applicants under 65 years of age must have a Medicare card (the federally-issued red, white, and blue card). Note: Medi-Cal is not accepted. x. Possession of a California DMV Placard Registration parking placard receipt. x. Possession of another transit agency card within the U.S. that is equivalent to the RTC card or ADA Paratransit certification outside of a Bay Area transit agency. x. Proof of Veterans Disability-- A copy of your Service Connected Disability ID card and your VA Certification letter demonstrating a disability rating for aid and attendance, or for a service-connected disability with a rating level of 50% or higher. x. For ADA Paratransit, please provide the name of the Bay Area transit agency ADA-paratransit eligibility was established. <p>xx. Medical Eligibility: To apply under "Medical Eligibility" there must be a licensed professional certify their disability</p>	<ul style="list-style-type: none"> x. Participation of multiple agencies x. Auto-verification if "Other Transit Agency card equivalent to RTC or ADA Paratransit certification outside of a Bay Area transit agency." 	https://511.org/transit/rtc-card/eligibility	A1 - County Partnerships, C1 - Universally at 400% of FPL
Cal-ITP (California-Integrated Travel Project)	Monterey-Salinas Transit	<ul style="list-style-type: none"> x. older adults (65 and up) to tap to pay a discounted bus fare at participating transit agencies. 	<ul style="list-style-type: none"> x. State wide effort x. Cost effective x. Minimizes Admin efforts x. Digitally administered x. State ID verification 	https://www.calitp.org/press/cal-itp-benefits-launch	S1 - Automatic Digital Verification
Lifeline	SFMTA	<p>The Lifeline Pass is a Muni-only monthly pass for qualified San Francisco residents on a limited income. The pass is offered at a 50% discount off the standard adult monthly pass price.</p>	<ul style="list-style-type: none"> x. Medi-cal or SNAP/EBT as a verification method x. Requires residential verification x. City and County wide 	www.sfmta.com/sites/default/files/reports-and-documents/2019/09/lifeline-app-with-benefit-cards_hsa_09192019.pdf	
LIFE (Low Income Fare is Easy)	LA Metro	<ul style="list-style-type: none"> x. Income needs to fall under the \$44,150 or less for a single-family household x. Applicants must be 18 years or older. X. there is an option to self certify income if an applicant does not have access to proof of income documents. 	<ul style="list-style-type: none"> x. Regional Program x. Fosters a large number of agencies x. Self- verification option x. Extensive list of income verification options from CalFresh to bank state 	https://www.metro.net/riding/fares/life/#frequently-asked-questions	S3 - Open Self-Verification
ORCA LIFT	King County	<ul style="list-style-type: none"> x. Gross household income (before taxes are taken out) must be no more than 200 percent of the Federal Poverty Level x. Those receiving Apple Health Medicaid, WIC, and Basic Food are also eligible for the program 	<ul style="list-style-type: none"> x. Works with Human Services Agency for eligibility process x. Includes a number of transit agencies 	https://kingcounty.gov/en/development/metro/fares-and-payment/discounted-fares/orca-lift#~:text=Apply%20for%20a%20card&text=Apply%20over%20the%20phone%20by%20our%20region%20at%20no%20cost	A1 - County Partnerships
101 Express Lanes - Community Transportation Benefits Program	San Mateo County	<ul style="list-style-type: none"> x. A resident of San Mateo County x. Age 18 or older x. Earning an Individual Income at or below \$78,300 for 2022 (60% of area median income). x. Automatically eligible if qualified for at least one benefit provided through San mateo County Core Service Agencies Network. 	<ul style="list-style-type: none"> x. Self- verification x. great CBO example x. Low administrative burden 	https://101expresslanes.org/faqs	S2 - CBO Peer Verification, S3 - Open Self-Verification
Hong Kong Senior Citizen Concessionary Transport Scheme	Hong Kong Government Transport Department	<ul style="list-style-type: none"> x. Age 60 and above. X. Permanent resident of Hong Kong. 	<ul style="list-style-type: none"> x. example of an honor system that transitioned to a verification based system x. urban example with a plethora of rail and bus options 	https://www.td.gov.hk/en/go-v-public-transport-fare-concession/index.html	S3 - Open Self-Verification



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0224 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 1/25/2024 **In control:** Regional Network Management Customer Advisory Group

On agenda: 2/23/2024 **Final action:**

Title: Fare Integration Updates

Progress update on the Clipper BayPass pilot and Reduce/No-Cost Transfer Policy.

Sponsors:

Indexes:

Code sections:

Attachments: [5b Fare Integration Update Memo](#)
[5bi Fare Integration Update Presentation Attachment A](#)

Date	Ver.	Action By	Action	Result
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Subject:

Fare Integration Updates

Progress update on the Clipper BayPass pilot and Reduce/No-Cost Transfer Policy.

Presenter:

Terrence Lee, MTC and Michael Eiseman, BART

Recommended Action:

Information

Attachments:

Regional Network Management – Customer Advisory Group

February 23, 2024

Agenda Item 5b

Fare Integration Update

Subject:

Project staff will present a progress update on the first two elements of the Fare Policy Vision Statement – the Clipper BayPass Pilot and the Reduced/No-Cost Transfer Policy.

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.

Phase 1 of the pilot is scheduled to end on June 30, 2024. Discussions are ongoing with partner institutions and transit operator staff to determine an appropriate approach for engaging with Phase 1 partners beyond June 30, 2024. The project team anticipates on providing an update to the Fare Integration Task Force in March 2024.

Phase 2 of the pilot has formally launched with the first three institutions – the University of California – San Francisco, the City of Menlo Park, and Alameda Transportation Management Association. These partnerships will provide nearly 8,000 people with access to unlimited regional travel on Bay Area transit services. As with Phase 1, the project team will closely monitor impacts to transit use, travel patterns, and attitudes and perceptions of transit. The project team also continues to recruit for additional partners for Phase 2, which will include up to a total of 10 institutions, with a combined total 20,000 individuals per a Participation Agreement between MTC and transit operators.

The Reduced/No-Cost Transfer Policy is slated to launch with the Next Generation Clipper System in Summer 2024. Under this policy, riders transferring between two agencies on Clipper receive a discount of up to \$2.50 within two hours of their first tag. To fund the pilot, transit agencies fund the first 50¢ of the discount, and MTC will reimburse the remainder of foregone

revenue for 18-24 months, with the duration dependent on available funding. Staff circulated a draft memorandum of understanding (MOU) for agency feedback and plan to seek endorsement of the final version at the Fare Integration Task Force meeting in Spring 2024, after which agency staff will seek Board approvals to authorize participation in the Reduced/No-Cost Transfer Policy.

A team of staff from MTC and BART is also working to support completion of the Title VI fare equity analysis required for these pilot fare programs. Consulting firm WSP is providing support for the Clipper BayPass Phase 1 Title VI fare equity analysis for MTC with expected completion in February. Staff has procured consultant support for Title VI analyses of the remaining fare integration pilots and is working to convene a staff working group from participating agencies to gather input and establish a work plan ensuring compliance with all applicable laws under Title VI.

Issues:

None identified.

Recommendations:

Information Item Only.

Attachments:

- Attachment A: Presentation



Fare Integration Update

Regional Network Management – Customer Advisory Group - Agenda Item 5b

February 23, 2024



Agenda – Fare Integration Overview

Where we've been

- Fare Coordination and Integration Study
- Fare Policy Vision Statement

Where we are

- Clipper BayPass Launch
- Transfer Policy Development

Where we're going

- Clipper BayPass Eval and Next Steps
- Transfer Policy Launch

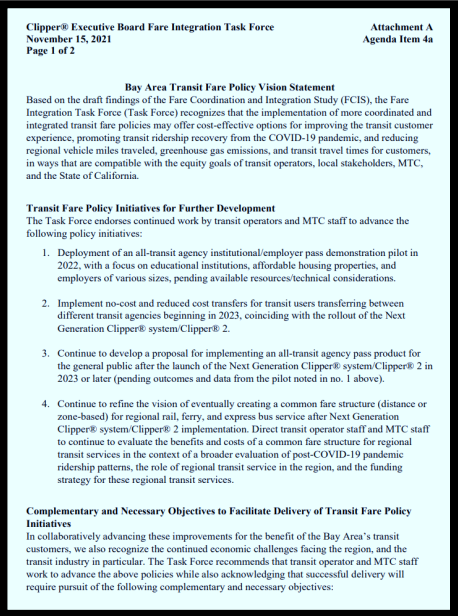
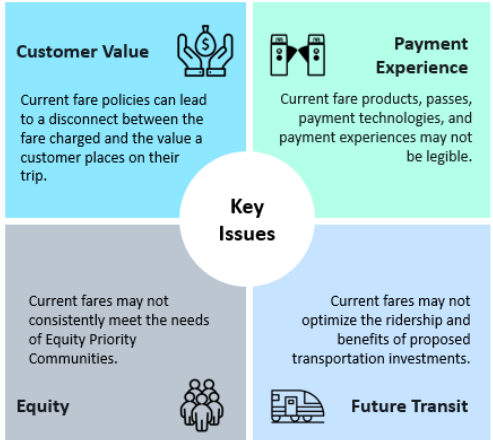
Where We've Been



- Two-year study of fare coordination challenges and opportunities in the Bay Area
- Business case analysis with recommendations

- Endorsement of policy direction informed by FCIS recommendations

- Deployed pilot of the Bay Area's first regional institutional pass product



Where We Are



<h2>PHASE 1</h2> <p>Educational Institutions and Affordable Housing Properties</p>	<h2>PHASE 2</h2> <p>Employers, Transportation Mgmt Associations, etc.</p>
<ul style="list-style-type: none"> Launched in Summer 2022 for nearly 50,000 students and residents. 	<ul style="list-style-type: none"> Launched in January 2024 for nearly 8,000 people Goal of providing BayPass to a total of 20,000 people
<ul style="list-style-type: none"> Executed MOUs with partners, identified \$4.5M in funding, secured operator approval, and worked with partners to conduct randomized control trial 	<ul style="list-style-type: none"> Executed participation agreement with operators and executed contracts with partners

What does success look like for BayPass



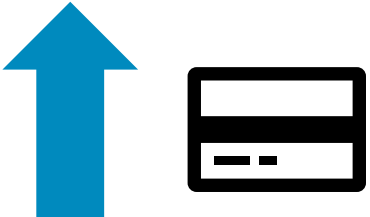
CATEGORY	DEFINITION	STATUS
Ridership	<ul style="list-style-type: none"> Increased transit ridership for existing agency passes and Clipper BayPass & new transit riders 	40% increase in ridership observed through randomized control trial with Phase 1 students
Attitudes and Perceptions	<ul style="list-style-type: none"> Improved attitudes/perceptions of transit; Improved sense of value Reduced perceptions of barriers for multi-agency trips 	74% increase in inter-operator transfers 90%+ student support for making BayPass available to all
Equity	<ul style="list-style-type: none"> Transportation needs for low-income and transit-dependent populations are better served 	Title VI Analyses to be conducted in 2024
Sustainability	<ul style="list-style-type: none"> VMT and GHG reductions in support of region's climate change commitments Decreased demand for parking 	Correlated with ridership; further analysis to be developed
Revenue	<ul style="list-style-type: none"> Ridership changes allow for at minimum a revenue neutral pricing strategy 	In progress
Administration	<ul style="list-style-type: none"> Institutions can administer BayPass effectively 	In progress
Stakeholder Support	<ul style="list-style-type: none"> Employers and Operators see value of the pass program Broad support for moving forward with a permanent program 	In progress

Interim Evaluation Takeaways After Year 1 (Universities)

Over 2 million trips in Year 1

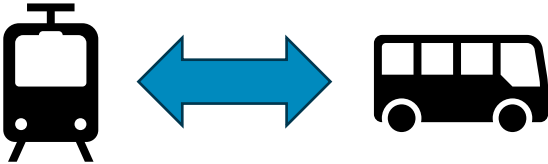
Randomized control trial evaluation show that compared to peers with single-agency passes, Clipper BayPass increases:

Public Transportation Usage



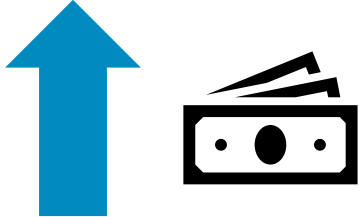
40% Increase in trips per card

Transfers between Operators



74% Increase

Average Fares



9% Increase in average fare of BayPass trips



Where We're Going

Phase 1

- Ends 6/30/2024
- Ongoing:
 - Determine how to proceed with existing Phase 1 partners
 - Determine how to work with other interested academic institutions
- Summer: Complete Phase 1 Program Evaluation

Phase 2

- Continue recruiting for 7 remaining Phase 2 employers
- Conduct preliminary evaluation and deploy surveys with initial employers

Where We're Going – Free/Reduced-Cost Transfers

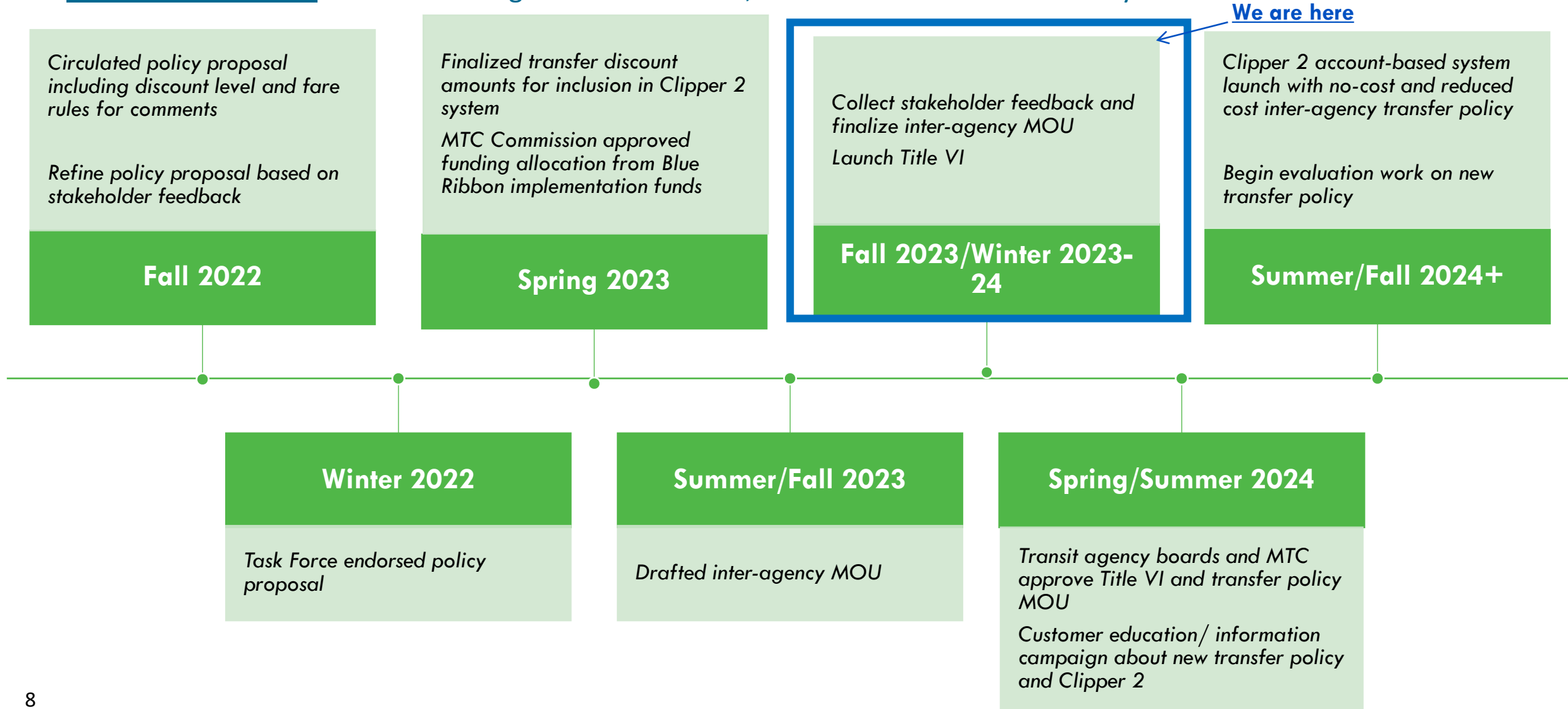
- Goals:**
- 1) Strengthen, standardize, and clarify transfer discounts between agencies on Clipper;
 - 2) Generate new transit trips;
 - 3) Improve customer experience on inter-agency travel

- Policy:** Riders get up to \$2.50 off when transferring to another agency within two hours of their first tag; cannot result in a negative fare
- The pilot would implement transfer discounts for a subset of cross-jurisdictional paratransit trips

- Funding:** Transit agencies fund the first 50¢ of the discount, and MTC will reimburse the remainder of foregone revenue for 18-24 months (duration based on available funding).
- Reimbursement adjusted for increases in transfer activity exceeding non-transfer trip ridership trends

Path to Free/Reduced-Cost Transfers Launch

Current key actions: MOU circulating for staff feedback; Title VI launch work underway



Discussion and Questions