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
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+16694449171,,89140000203# US

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Webinar ID: 891 4000 0203

International numbers available: https://bayareametro.zoom.us/u/kMMmQopsJ
Detailed instructions on participating via Zoom are available at:
https://bayareametro.zoom.us/u/kdR1hznEgA
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.

Clerk: Wally Charles
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

Action: Approval

Presenter: Ky-Nam Miller, MTC

Attachments: 4a_Annual_Work_Plan_Development

5. Information

5a. 24-0303 Clipper START Pilot Program Update

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.

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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.
Subject:
Minutes of the January 26, 2024 Meeting

Recommended Action:
Board Approval

Attachments:
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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+12532158782,,83731503443# US (Tacoma)

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Webinar ID: 837 3150 3443

International numbers available: https://bayareametro.zoom.us/u/kdhj8jENFV
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Roster


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:
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.
Subject: Annual Work Plan Development


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 START\(^1\))
- Regional Mapping & Wayfinding
- Transit Priority
- Transit 2050+\(^2\)
- Access & Mobility Work Plan\(^1\)
- 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

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\(^1\) May also be presented to the Equity and Access Subcommittee.

\(^2\) May also be presented to the full Policy Advisory Council.
Staff will provide an update on the Clipper START Pilot Program to grow and evolve the Program.

### 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:
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:

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

Timeline:
- Feasibility Study 2017
- Program Approved 2018
- Pilot Launch 2019
- Expansion 2020
- Extension 2021
- Second Expansion 2022
- Post-Pilot 2023
- ENHANCEMENT TODAY 2024
Applying the Pillars of MTC’s Equity Platform

1. Define and Measure
   - Establish Goals and Metrics

2. Listen and Learn
   - Co-create

3. Focus and Deliver
   - Partner and Execute

4. Train and Grow
   - Use results to improve future policy and programs

---

Evolving and Growing the Program

Applying Stakeholder Feedback to “Phase 3”

Program Implementation

Phase 3 Assessment

We Are Here
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

<table>
<thead>
<tr>
<th>NEW</th>
<th>Clipper-wide transit agency participation &amp; 50% discount</th>
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<tbody>
<tr>
<td></td>
<td>Continuing Marketing and Outreach Efforts:</td>
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<tr>
<td></td>
<td>• Equity Priority Community geographic targeting</td>
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<td>• Multilingual marketing materials</td>
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### Other Factors

- Post-COVID reopening
- Increased transit ridership
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
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
Preliminary Assumptions: Strategy Concepts in Development

<table>
<thead>
<tr>
<th>Strategy Concepts</th>
<th>What It is</th>
<th>Impacts</th>
<th>Equity and Access</th>
<th>Implementation Considerations</th>
<th>MTC / Agency Financial Implications</th>
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<tbody>
<tr>
<td><strong>Auto Verification</strong></td>
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<td>A1 - County Partnerships (example used: CalFresh / EBT)</td>
<td>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.</td>
<td>Uptake can be expected to increase. If Clipper START is added to the CalFresh package upon application, there will likely be achieved through including messaging about Clipper START to CalFresh outreach and communications.</td>
<td>There is significant overlap between the demographics who would be eligible for CalFresh and EBT, and those who are most dependent on public transit. Cost savings would likely be limited as the pool of auto-enrolled applicants would be limited as the pool of auto-enrolled applicants</td>
<td>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 enrolled through Clipper START. Examples of additional MTC functions and costs may include inter-program coordination and fraud-monitoring. Overall the cost impact would likely be neutral.</td>
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<td>There were no existing examples of direct auto-enrollment for means based programs based on initial review of peer programs.</td>
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<td>A2 - Transit Agency Partnerships (example used: Peer Agency Programs)</td>
<td>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.</td>
<td>Uptake can be expected to marginally increase in the localized peer program area (i.e. San Francisco for LifeLine), but systematic uptake improvements would not manifest unless MTC establishes auto-enrollment with all local agency programs across the nine counties.</td>
<td>There is likely a sizable overlap (likely so with LifeLine) between populations eligible for a local means based transit benefit and Clipper START.</td>
<td>Cost impacts may be limited, with inter-program coordination and fraud-monitoring being drivers of additional costs. Cost savings would likely 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.</td>
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<td>A3 - State Partnerships (example used: Medi-Cal)</td>
<td>Upon successful application and receipt of Medi-Cal, a Clipper START card will also be provided as part of the benefit package without need for additional application to MTC.</td>
<td>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.</td>
<td>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 larger awareness and popularity of Medi-Cal auto-enrolling Clipper START can improve both uptake and uptake rates within the existing pool of eligible applicants.</td>
<td>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.</td>
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<td><strong>Self-Verification</strong></td>
<td>Use of financial services technologies to verify an applicant's eligibility, such as income. This alleviates the need for manual verification 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.</td>
<td>Digital verification services, by definition, would require access to an electronic device whether by phone, MTC in operating the program, and defend against fraud.</td>
<td>CBCs typically have a deep understanding of their local communities, and have relationships and trust with community members that government agencies may not typically have. CBCs 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 available and effective services. CBCS should be a true partnership with CBCs rather than using them as a vehicle for engagement; they should be involved in policy with CBCs to create accessibility improvements and provide feedback on the program.</td>
<td>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 CBCS may prove more cost effective and aligned with Clipper START's goals.</td>
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<tr>
<td>S1 - Automatic Digital Verification</td>
<td>An applicant's eligibility would be verified and &quot;patched for&quot; by identified third party, community based organizations (CBCS), reducing the burden on MTC to conduct verification.</td>
<td>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.</td>
<td>Coordination between MTC and CBCS 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 CBCS 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.</td>
<td>CBCS were part of Clipper START program promotion and application assistance in the pilot phase, so some level of CBC network exists. However, could be leveraged more extensively.</td>
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<td>There were no existing examples of direct auto-enrollment for means based programs based on initial review of peer programs.</td>
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<td>S2 - CBD Peer Verification</td>
<td>Users likely to increase especially where CBCS can service local community interests to raise awareness and help applicants complete applications. The San Mateo 101 Express Lane program leveraged the County's Center for Service Delivery Networks of local nonprofits and community organizations to reach individuals in need. In Q4 of FY2021, 2,426 benefits were issued where BNs (1,964) were Clipper cards containing $90.</td>
<td>Over time, self-verification has the potential to marginally 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.</td>
<td>There is no way to accurately predict the proportion of increase in applications and funding required to adequately operate a self-verification system that has been established and gained traction over time. The cost may also be impractical 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.</td>
<td>Coordination between MTC and CBCS 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 CBCS 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.</td>
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<td>S3 - Open Self-Verification (Honor System)</td>
<td>The eligibility threshold to participate in Clipper START would be universe increased to 400% of the Federal Poverty Level.</td>
<td>Uptake can be expected to increase substantially; however the rate of uptake may vary by the strategy. An increase in the number of eligible recipients as a source of increasing uptake, the uptake rate may not increase without commensurate marketing and outreach efforts.</td>
<td>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 commensurate marketing and outreach efforts. They should be involved in policy with CBCS to create accessibility improvements and provide feedback on the program.</td>
<td>Beyond the cost of subsidizing more passes, administrative costs in manually verifying a larger number of applications was not found to be a driver of additional cost impacts.</td>
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<td></td>
<td>The eligibility threshold to participate in Clipper START would be universe increased to 400% of the Federal Poverty Level.</td>
<td>Uptake can be expected to increase if Clipper START is added to the Medi-Cal package upon application. It is also likely to be achieved through including messaging about Clipper START to Medi-Cal outreach and communications.</td>
<td>There is significant overlap between the demographics who would be eligible for CalFresh and EBT, and those who are most dependent on public transit. Cost savings would likely be limited as the pool of auto-enrolled applicants would be limited as the pool of auto-enrolled applicants</td>
<td>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 enrolled 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.</td>
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<td><strong>Change Income Eligibility</strong></td>
<td>The eligibility threshold to participate in Clipper START would be universe increased to 400% of the Federal Poverty Level.</td>
<td>Uptake can be expected 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.</td>
<td>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 commensurate marketing and outreach efforts. They should be involved in policy with CBCS to create accessibility improvements and provide feedback on the program.</td>
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<td>C1 - Universally at 400% of FPL</td>
<td>The eligibility threshold to participate in Clipper START would be universe increased to 400% of the Federal Poverty Level.</td>
<td>Uptake can be expected to increase if Clipper START is added to the Medi-Cal package upon application. It is also likely to be achieved through including messaging about Clipper START to Medi-Cal outreach and communications.</td>
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<td>The eligibility threshold to participate in Clipper START would be universe increased to 400% of the Federal Poverty Level (FPL) to be below the median individual income threshold for the applicant's county.</td>
<td>Uptake can be expected to increase if Clipper START is added to the Medi-Cal package upon application. It is also likely to be achieved through including messaging about Clipper START to Medi-Cal outreach and communications.</td>
<td>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 commensurate marketing and outreach efforts. They should be involved in policy with CBCS to create accessibility improvements and provide feedback on the program.</td>
<td>Beyond the cost of subsidizing more passes, administrative costs in manually verifying a larger number of applications was not found to be a driver of additional cost impacts.</td>
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## 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.

<table>
<thead>
<tr>
<th>Program</th>
<th>Agency</th>
<th>General Information / Eligibility</th>
<th>Relevance to MTC Clipper START</th>
<th>Links</th>
<th>Strategy Concept</th>
</tr>
</thead>
</table>
| **LIVE** | RTD (Denver, CO) | 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 | x. Regional Program  
x. X. Adopts the Federal income poverty levels  
x. x. wide range of residents  
| | | | 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://www.rtd. denver.com/LIVE qualify | A1 - County Partnerships, A3 - State Partnerships |
| **RTC (Regional Transit Connection) - 511 Bay Area** | MTC | Applicants to the RTC program can choose to apply using either Basic or Medical eligibility.  
x. Basic Eligibility:  
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  
x. Medical Eligibility - To apply under “Medical Eligibility” there must be a licensed professional certify their disability | x. Regional Program  
x. x. Adopts the Federal income poverty levels  
| | | | 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/transport/rtc-card/eligibility | A1 - County Partnerships, C1 - Universally at 400% of FPL |
| **Lifeline** | Monterey-Salinas Transit | x. older adults (65 and up) to tap to pay a discounted bus fare at participating transit agencies. | x. State wide effort  
x. Cost effective  
x. x. Digitally administered  
x. x. State ID verification  
x. x. Medi-cal or SNAP/EBT as a verification method  
x. x. Requires residential verification  
x. x. City and County wide | x.x | S1 - Automatic Digital Verification |
| **Life (Low Income Fare is Easy)** | SFMTA | 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. | x. Regional Program  
x. x. Adopts the Federal income poverty levels  
x. x. x. wide range of residents  
| | | | Fosters a large number of agencies  
x. x. Self-verification option  
x. Extensive list of income verification options from CalFresh to Medi-cal or SNAP/EBT as a verification method  
x. (Digits administered)  
x. Minimizes Admin efforts  
x. State wide effort  
x. Cost effective  
x. x. Digitally administered  
| | | | x. x. State ID verification  
x. x. Medi-cal or SNAP/EBT as a verification method  
x. x. Requires residential verification  
x. x. City and County wide | x. Works with Human Services Agency for eligibility process  
x. Includes a number of transit agencies  
x. x. Self-verification option  
x. Extensive list of income verification options from CalFresh to Medi-cal or SNAP/EBT as a verification method (Digits administered)  
x. Minimizes Admin efforts  
x. State wide effort  
x. Cost effective  
x. x. Digitally administered  
x. x. State ID verification  
x. x. Medi-cal or SNAP/EBT as a verification method  
x. x. Requires residential verification  
x. x. City and County wide | A1 - County Partnerships |
| **ORCA LIFT** | King County | 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  
x. x. Self-verification  
x. x. great CBO example  
x. x. Low administrative burden | x. Works with Human Services Agency for eligibility process  
x. Includes a number of transit agencies  
x. x. Self-verification option  
x. Extensive list of income verification options from CalFresh to Medi-cal or SNAP/EBT as a verification method (Digits administered)  
x. Minimizes Admin efforts  
x. State wide effort  
x. Cost effective  
x. x. Digitally administered  
x. x. State ID verification  
x. x. Medi-cal or SNAP/EBT as a verification method  
x. x. Requires residential verification  
x. x. City and County wide | A1 - County Partnerships |
| **101 Express Lanes - Community Transportation Benefits Program** | San Mateo County | 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. | x. Self-verification  
x. x. great CBO example  
x. x. Low administrative burden | x. Works with Human Services Agency for eligibility process  
x. Includes a number of transit agencies  
x. x. Self-verification option  
x. Extensive list of income verification options from CalFresh to Medi-cal or SNAP/EBT as a verification method (Digits administered)  
x. Minimizes Admin efforts  
x. State wide effort  
x. Cost effective  
x. x. Digitally administered  
x. x. State ID verification  
x. x. Medi-cal or SNAP/EBT as a verification method  
x. x. Requires residential verification  
x. x. City and County wide | S2 - CBO Peer Verification, S3 - Open Self-Verification |
| **Hong Kong Citizen Concessionary Transport Scheme** | Hong Kong Government Transport Department | x. Age 60 and above  
x. Permanent resident of Hong Kong. | x. example of an honor system that transitioned to a verification based system  
x. x. Urban example with a plethora of rail and bus options | x. example of an honor system that transitioned to a verification based system  
x. x. Urban example with a plethora of rail and bus options | S3 - Open Self-Verification |
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:
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 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

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

**Vision Statement**
- Endorsement of policy direction informed by FCIS recommendations

**Pilot Implementation**
- Deployed pilot of the Bay Area’s first regional institutional pass product
## Where We Are

### PHASE 1
**Educational Institutions and Affordable Housing Properties**
- Launched in Summer 2022 for nearly 50,000 students and residents.
- Executed MOUs with partners, identified $4.5M in funding, secured operator approval, and worked with partners to conduct randomized control trial.

### PHASE 2
**Employers, Transportation Mgmt Associations, etc.**
- Launched in January 2024 for nearly 8,000 people.
- Goal of providing BayPass to a total of 20,000 people.
- Executed participation agreement with operators and executed contracts with partners.
## What does success look like for BayPass

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>DEFINITION</th>
<th>STATUS</th>
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<tbody>
<tr>
<td>Ridership</td>
<td>• Increased transit ridership for existing agency passes and Clipper BayPass &amp; new transit riders</td>
<td>40% increase in ridership observed through randomized control trial with Phase 1 students</td>
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</table>
| Attitudes and Perceptions | • 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         | • Transportation needs for low-income and transit-dependent populations are better served | Title VI Analyses to be conducted in 2024 |
| Sustainability | • 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        | • Ridership changes allow for at minimum a revenue neutral pricing strategy | In progress |
| Administration | • Institutions can administer BayPass effectively | In progress |
| Stakeholder Support | • 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

- **Fall 2022**
  - Circulated policy proposal including discount level and fare rules for comments
  - Refine policy proposal based on stakeholder feedback

- **Spring 2023**
  - Finalized transfer discount amounts for inclusion in Clipper 2 system
  - MTC Commission approved funding allocation from Blue Ribbon implementation funds

- **Fall 2023/Winter 2023-24**
  - Collect stakeholder feedback and finalize inter-agency MOU
  - Launch Title VI

- **Summer/Fall 2024+**
  - Clipper 2 account-based system launch with no-cost and reduced cost inter-agency transfer policy
  - Begin evaluation work on new transfer policy

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**Winter 2022**
- Task Force endorsed policy proposal

**Summer/Fall 2023**
- Drafted inter-agency MOU

**Spring/Summer 2024**
- Transit agency boards and MTC approve Title VI and transfer policy MOU
- Customer education/information campaign about new transfer policy and Clipper 2
Discussion and Questions