



375 Beale Street, Suite  
800  
San Francisco, CA 94105

## Meeting Agenda

### Blue Ribbon Transit Recovery Task Force

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Monday, July 26, 2021

1:05 PM

Board Room 1st Floor (REMOTE)

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The Blue Ribbon Transit Recovery Task Force will meet on Monday July 26, 2021 at 1:05 p.m., in the Bay Area Metro Center (Remotely). In light of Governor Newsom's State of Emergency declaration regarding the COVID-19 outbreak and in accordance with Executive Order N-29-20 issued by Governor Newsom on March 17, 2020 and the Guidance for Gatherings issued by the California Department of Public Health, the meeting will be conducted via webcast, teleconference, and Zoom for Task Force members who will participate in the meeting from individual remote locations.

A Zoom panelist link for meeting participants will be sent separately to Task Force members.

The meeting webcast will be available at <http://mtc.ca.gov/whats-happening/meetings>. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number. Task Force 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. In order to get the full Zoom experience, please make sure your application is up to date.

Attendee Link: <https://bayareametro.zoom.us/j/85214855796>

Join by Telephone: 888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)

Webinar ID: 852 1485 5796

International numbers available: <https://bayareametro.zoom.us/u/kdnYc6YwIS>

Detailed instructions on participating via Zoom are available at:  
<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](mailto: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.

## 1. Roll Call / Confirm Quorum

*A quorum of this Task Force shall be a majority of its voting members (17)*

## 2. Chair Comments

*Commissioner Jim Spering*

## 3. Consent Calendar

- 3a. [21-0970](#) Minutes of the June 28, 2021 Meeting

**Action:** Approval

**Attachments:** [Minutes of the June 28, 2021 Meeting](#)

- 3b. [21-0971](#) BTRTF #14 Meeting Summary (June 28, 2021)

**Action:** Approval

**Attachments:** [BTRTF #14 Meeting Summary \(June 28, 2021\)](#)

## 4. Network Management Evaluation

*A set of Network Management Alternatives and evaluation criteria were presented at the June meeting. Based on feedback received, the consultant team has refined the alternatives and evaluation criteria for their qualitative assessment. This independent network management assessment will be presented as an information item and will inform the next phase of the business case analysis that will commence in Fall 2021.*

- [21-0972](#) Network Management Evaluation

**Action:** Information

**Presenter:** VIA Architecture

**Attachments:** [Item 04 Memo](#)  
[Item 04 Appendix A - Preliminary Option Evaluation](#)  
[Item 04 NMEval Presentation](#)

## 5. Next Steps

*An overview of the anticipated next steps to advance the recommendations and work of this Task Force will be presented.*

- [21-0988](#) Next Steps

**Action:** Information

**Presenter:** Steve Kinsey, CivicKnit and Alix Bockelman, MTC

**Attachments:** [Item 5 Memo](#)  
[Item 5 Presentation](#)  
[Comment Letter Advisory Council](#)

## 6. Transformation Action Plan

### 6a. Revised Actions

*Revised Actions will be presented to the Task Force for review and adoption.*

[21-0973](#)

Revised Actions

**Action:**

Approval

**Presenter:**

Steve Kinsey, CivicKnit

**Attachments:**

[Item 6a Memo](#)

[Item 6a Presentation](#)

[Item 6a Action Matrix](#)

[Item 6a Action Comment Log](#)

[Comment Letter Bay Area Elected Officials & Voices for Public Transportation](#)

### 6b. Draft Transformation Action Plan

*The Draft Transformation Action Plan represents a culmination of the Task Force's work in the past year that produced a set of specific actions converging around five outcomes.*

[21-1009](#)

Draft Transformation Action Plan

**Attachments:**

[Item 6b Memo](#)

[Item 6b Draft Transit Transformation Action Plan](#)

## 7. Public Comments / Other Business

*Task Force 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.*

[21-0974](#)

Other Business

**Attachments:**

[Item 07 Transit Agency Ridership Updates July 2021](#)

[Item 07 Return to Transit Communications Toolkit](#)

[Comment Letter TransForm](#)

## 8. Meeting Summary

*Steve Kinsey, CivicKnit*

## 9. Adjournment

**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](http://mtc.ca.gov)) for public review for at least one year.

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

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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

## Legislation Details (With Text)

**File #:** 21-0970      **Version:** 1      **Name:**  
**Type:** Action Item      **Status:** Committee Approval  
**File created:** 7/8/2021      **In control:** Blue Ribbon Transit Recovery Task Force  
**On agenda:** 7/26/2021      **Final action:**  
**Title:** Minutes of the June 28, 2021 Meeting  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [Minutes of the June 28, 2021 Meeting](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Minutes of the June 28, 2021 Meeting

**Recommended Action:**  
Approval

**Attachments:**



375 Beale Street, Suite  
800  
San Francisco, CA 94105

## Meeting Minutes - Draft

### Blue Ribbon Transit Recovery Task Force

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Monday, June 28, 2021

1:05 PM

Board Room 1st Floor (REMOTE)

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#### 1. Roll Call / Confirm Quorum

**Present:** 29 - Member Chavez, Member Mau, Member Bouchard, Chair Spering, Member Pedroza, Member Josefowitz, Member Papan, Member Rabbitt, Member Worth, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Tumlin, Member Halls, Member Baker, Member Wu, Member Kinman, Member Chiu, Member Kim, Member Lindsay, Member Murphy, Member Griffiths, Member Wunderman, Member Rotchy, and Member Ford

**Absent:** 3 - Member Grisby, Member Tran, and Member Cortese

Chad Edison acted as a delegate and voting member of the Task Force in place of David Kim. Actions noted as "Kim" were taken by Chad Edison.

#### 2. Chair Comments

#### 3. Consent Calendar

**Upon the motion by Member Pedroza and second by Member Baker, the Consent Calendar was unanimously approved. The motion carried by the following vote:**

**Present:** 28 - Member Chavez, Member Mau, Member Bouchard, Chair Spering, Member Pedroza, Member Josefowitz, Member Papan, Member Rabbitt, Member Worth, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Tumlin, Member Halls, Member Baker, Member Wu, Member Kinman, Member Chiu, Member Kim, Member Lindsay, Member Murphy, Member Griffiths, Member Rotchy, and Member Ford

**Absent:** 4 - Member Grisby, Member Tran, Member Cortese, and Member Wunderman

#### 3a. [21-0863](#) Minutes of the May 24, 2021 Meeting

**Action:** Approval

**Attachments:** [Minutes of the May 24, 2021 Meeting](#)  
[Adopted BRTF Roles and Responsibilities May 2021](#)

**3b.**     [21-0864](#)     BTRTF #13 Meeting Summary (May 24, 2021)

**Action:** Approval

**Attachments:** [BTRTF #13 Meeting Summary \(May 24, 2021\)](#)

[Roles and Definitions Amended](#)

**3c.**     [21-0937](#)     Minutes of June 10, 2021 and June 21, 2021 with Transit Operators

**Action:** Approval

**Attachments:** [Minutes BTRTF Special Meeting Large Transit Operators.06102021](#)

[Minutes BTRTF Special Meeting Small Transit Operators 06212021](#)

**4. Network Management Evaluation**

The following individuals spoke on this Item:

Richard Hedges;

Joe Kunzler;

Wendi Kallins;

Adina Levin;

Derek Sagehorn;

Warren Cushman; and

Remi Tan.

**4a**     [21-0866](#)     Network Management Evaluation

**Action:** Information

**Presenter:** VIA Architecture

**Attachments:** [Item 4 Memo](#)

[Item 4 Presentation](#)

## 5. Transformation Action Plan

The following individuals spoke on this Item:  
Laura Tolkoff Transportation Director for SPUR;  
Adina Levin;  
Remi Tan;  
Warren Cushman; and  
Roland Lebrun.

### 5a. [21-0867](#) Outcomes and Draft List of Actions

**Action:** Information

**Presenter:** Steve Kinsey, CivicKnit

**Attachments:** [Item 5 Memo](#)  
[Item 5 Action Plan Presentation](#)

## 6. Public Comments / Other Business

### 6a. [21-0865](#) Transit Agency Ridership Updates

**Attachments:** [Transit Operator Ridership Update](#)  
[Public Comments received](#)

## 7. Meeting Summary

## 8. Adjournment / Next Meeting

# Metropolitan Transportation Commission

## Legislation Details (With Text)

**File #:** 21-0971      **Version:** 1      **Name:**  
**Type:** Action Item      **Status:** Committee Approval  
**File created:** 7/8/2021      **In control:** Blue Ribbon Transit Recovery Task Force  
**On agenda:** 7/26/2021      **Final action:**  
**Title:** BTRTF #14 Meeting Summary (June 28, 2021)  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [BTRTF #14 Meeting Summary \(June 28, 2021\)](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
BTRTF #14 Meeting Summary (June 28, 2021)

**Recommended Action:**  
Approval

**Attachments:**



## TRANSIT RECOVERY TASK FORCE

TO: Blue Ribbon Transit Recovery Task Force

DATE: July 26, 2021

FR: Steve Kinsey, CivicKnit

RE: BTRTF Meeting #14 Summary

### **Mutual Understanding from Task Force Meeting #14**

1. The Task Force supported targeting completion of the Business Case in time to inform state legislation in 2022.
2. The Task Force and public commenters supported targeting completion of a Connected Network Plan in time to be presented to voters in 2024.
3. The Task Force and public commenters supported greater engagement with Accessibility advocates.

### **Identified Concerns**

1. There were concerns about the composition of the post-BRTF advisory body.
2. Accessibility advocates expressed interest in greater participation in the process.

### **Meeting Summary**

Chair Spering began by reporting on public updates with Board Members and top leadership of most of the Bay Area's large and small transit operators. He acknowledged the consultants' hard work preparing for the June 16 Ad Hoc Network Management workshop and his Task Force colleagues' ability and enthusiasm to complete the exercises that provide a clearer picture for this meeting's review. He confirmed that MTC intends to establish a multi-stakeholder advisory body in September or October to carry on this work after the conclusion of the Blue Ribbon, primarily focused as a sounding board for the Business Case evaluation of network management reforms. It would be consensus-oriented with equal representation from transit operators and other stakeholders – including MTC, business, equity, and labor. His initial thinking is that it should be comprised of 7 transit GMs selected by the operators and 7 other stakeholders identified by MTC.

The facilitator introduced the Network Management Evaluation team and reminded the Task Force that the consultants were retained to provide an independent review of the Task Force's work and network management alternative structures. The consultants led the Task Force through a series of slides depicting four different decision making structures before receiving Task Force members' comments, which included interest in better understanding who would control the funding and have overriding decision authority, how different approaches would impact equity issues, the relative cost of changes to the current management structure, the idea of proceeding with immediate actions as "stepping stones" towards greater public accountability,

the need to recognize that locally generated funds should remain under local control, the importance of evaluating how current transit funds are spent before asking for more tax dollars and the timing of moving transit decisions forward.

The consultants presented a list of nine evaluation criteria, under two broader categories of Effectiveness and Implementation. The purpose of the criteria is to qualitatively evaluate alternative structures in order to identify key consequences and trade-offs for a more technical, quantitative Business Case analysis. Task Force members' comments included a question regarding the ability of a structure to be nimble when needed, the ability to act efficiently, the importance of adding quantitative metrics, and the critical need to have public support for the solution.

Public participant comments included the need for both independence and accountability, the need for a single decision maker, support for a "stepping stone" approach to transformation and the importance of having transit-dependent persons participating.

The facilitator presented a first draft set of 25 actions organized under five outcomes and asked the Task Force to comment on them. He emphasized that several were identified as "accelerated actions" to elevate their priority in the near-term. Comments included support for Sonoma and Solano receiving funds to better integrate their intra-county transit, mention of four east Bay operators' pilot for a one-seat paratransit ride, the importance of new funding for regional services in order to protect existing operations, faster delivery of bus priority projects, suggested changes to Chair Spering's initial advisory group composition, moving up the Business Case analysis and Connected Network planning completion targets and the need for greater participation by paratransit users. Public participant comments included support for completing network planning sooner than 2024 and concern that the timing was being set by political calendars.

The facilitator summarized the meeting and reported that comments made would be reflected in a revised set of actions at the July (final) BRTF Meeting.

# Metropolitan Transportation Commission

## Legislation Details (With Text)

**File #:** 21-0972      **Version:** 1      **Name:**

**Type:** Report      **Status:** Informational

**File created:** 7/8/2021      **In control:** Blue Ribbon Transit Recovery Task Force

**On agenda:** 7/26/2021      **Final action:**

**Title:** Network Management Evaluation

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 04 Memo](#)  
[Item 04 Appendix A - Preliminary Option Evaluation](#)  
[Item 04 NMEval Presentation](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Network Management Evaluation

**Presenter:**  
VIA Architecture

**Recommended Action:**  
Information

**Attachments:**

## MEMORANDUM

TO MTC, Blue Ribbon Transit Recovery Task Force

FROM Tamim Raad (Access Planning), Kate Howe (VIA)

DATE July 22, 2021

SUBJECT Regional Network Management Option Evaluation

### Purpose

This cover memo provides context for the materials to be presented to the Blue Ribbon Transit Recovery Task Force on the 26<sup>th</sup> July meeting. At the meeting, the Consultant Team will present a description and preliminary assessment of Regional Network Management (RNM) structure options, and seek the Task Force's input as the team prepares its final report, to be delivered on August 9th.

*Task Force members are encouraged to fully review all materials in advance of the meeting.* The objective of the July 26<sup>th</sup> Meeting is to maximize dialogue on key issues and trade-offs related to RNM structures. We will move quickly from addressing points of clarification to key discussion points. Included in this packet is a Draft Network Management Options Evaluation Summary (Appendix A) and a slide presentation (Appendix B – to follow on July 23).

### Context

As outlined in our [memo to the Task Force on the 24<sup>th</sup> of May](#), the Consultant team method followed a four step process to its scope of work, developing options by understanding the potential decision accountabilities for regional network management, developing regional network management structural approaches and creating an assessment framework for evaluating them. Working within the available timeframe, this work product focuses on the key interests and values, trade-offs, and questions to resolve through a future detailed business case. The final report will contain recommendations for next steps and provide more information on how the future business case can further evaluate and explore costs, risks and structural options.

To develop and inform this assessment, the Consultant Team has relied upon:

- Extensive interviews with agency staff, stakeholders and members of the BTRTF;
- Extensive document review of past studies, plans and submittals and official correspondence with the BTRTF;
- The Consultant Team's collective experience working in regional transportation reform in jurisdictions across North America.

## Study Parameters and Limitations

The following are important qualifications to the scope of our study and attached Appendix A.

- 1) **Option evaluation in this assessment, not option selection.** The purpose of our assignment is to provide a structured framework to ‘set the table’ for further, more detailed business case analysis. Our team explored the extent to which these options can meet identified criteria, and does not recommend a single preferred option.
- 2) **All options are capable of materially addressing regional network management.** This evaluation puts forward three distinct, credible and workable options capable of delivering on Network Management outcomes, each with varying degrees of impact on outcomes, costs and risk. Each option is capable of meaningfully addressing the roles and responsibilities as set out by the Task force and realizing outcomes. The different capabilities in realizing the extent of roles, and ease of implementation are documented in the option assessment.
- 3) **Evaluation is indicative, not definitive.** The options have been developed to a resolution of detail, with information readily available to support Task Force dialogue on the salient differences, trade-offs and choices. The evaluation also identifies unresolved issues for further exploration.
- 4) **Options are consultant generated.** We have reviewed proposals for regional transport governance realignment from past reports, as well as the more current proposals prepared by individual Task Force members/organizations. No option presented is intended to entirely reflect a structure presented by any member of the BTRTF members or their respective organizations. Instead, our team has taken many of the design features included in those proposals and organized the option presented herein to illustrate the key option design choices, or a “choice framework” for RNM, under which many further design refinements may exist. They have also been developed to ensure the structure designs reflect principles for good governance which have been laid out for reference in Appendix A.

## Key Choices

The Team believes the two most salient and relevant decisions to make about RNM are:

- a) the extent of regional network management scope,
- b) location of regional network management policy accountability.

## Next Steps

- The Team will collate findings and outputs into a Final Summary Report. This report will include a set of recommendations for next steps, including an outline of the business case process.
- The business case effort will quantify and monetize benefits and impacts on a focused subset of realistic options. The business case will analyze the marginal case for each selected structure relative to a defined base case (status quo). Areas of assessment may also include the marginal capability for each selected structure to deliver on a specific role or responsibility (e.g. wayfinding, bus priority or rail network).
- As regional values become better reflected through further network management scope definition, refinements to options and design permutations within the overall choice framework may be necessary.

## Appendix A – Preliminary RNM Option Evaluation Assessment

## Contents and document organization.

1. Purpose .....	2
2. Regional Network Manager Roles and Responsibilities.....	2
3. RNM Structure Options Overview .....	3
4. Assessment Criteria and Methods .....	8
5. Regional Network Manager Options Description and Assessment .....	11
5.1 Regional Network Management Status Quo .....	11
5.2 Network Management   (Formerly Design Options 1 & 2): .....	13
5.3 Network Manager   Design Option 3 .....	18
5.4 Network Manager   Design 4.....	22

This document is organized into five sections.

**Section 1.** introduces the document and provides an overview of its purpose.

**Section 2.** outlines the roles and responsibilities of the task force which were used to develop and refine the structure and is highlighted in Section 3.

**Section 3.** describes the other key factors and inputs that were used as the basis for design in developing the options. These include specific interviews, document review, as well as the desire to create a choice framework, consideration of good governance principles and what design variants and permutations are likely to exist under the structures.

**Section 4.** outlines how the assessment criteria was developed and the methodology used for scoring and assessment. This section also highlights what are considered to be key, decision relevant criteria for this phase of the process.

**Section 5.** individually describes and levies an assessment of each of the Regional Network Management (RNM) structure options against the evaluation criteria. A comparison summary table is included at the end of the appendix document.

## 1. Purpose

This Appendix provides supporting information to the July 21, 2021, *Regional Network Management Structures and Evaluation Criteria Memo*. It outlines a proposed set of potential structures for Regional Network Management, describes criteria used to assess the suitability of these structures to deliver on the roles and responsibilities outlined by the BRTF, and offers an initial high-level comparison of the structures against the criteria. This high-level assessment provides a comparative framework to inform the subsequent business case which would undertake a more detailed assessment of the benefits and costs of each structure.

## 2. Regional Network Manager Roles and Responsibilities

### 2.1 Blue Ribbon Task Force Outcomes

The BRTTF has articulated key network outcomes the improved RNM should endeavor to achieve and has identified the relevant network roles and responsibilities that need to be managed at a regional scale to deliver on these. The consultant team provided a preliminary assessment in its [May 24 Memo on Roles and Responsibilities](#).

NETWORK MANAGEMENT OUTCOMES	ROLES & RESPONSIBILITIES
<b>I. FARES AND PAYMENT:</b> Simpler, consistent, and equitable fares and payment options attract more riders.	<ul style="list-style-type: none"> <li>Fare Integration Policy</li> </ul>
<b>II. CUSTOMER INFORMATION:</b> Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	<ul style="list-style-type: none"> <li>Branding, Mapping and Wayfinding</li> <li>Technology and Mobile Standards</li> <li>Marketing / Public Information</li> </ul>
<b>III. TRANSIT NETWORK:</b> Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	<ul style="list-style-type: none"> <li>Bus Transit Priority</li> <li>Bus Network Management Reform</li> <li>Rail Network Management Reform</li> <li>Connected Network Planning</li> <li>Station Hub Design Review</li> <li>Capital Project Prioritization</li> <li>Data Collection and Coordination</li> </ul>
<b>IV. ACCESSIBILITY:</b> Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.	<ul style="list-style-type: none"> <li>Accessible Services (including Paratransit)</li> <li>Centralized Program Eligibility Verification</li> </ul>
<b>V. FUNDING:</b> The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.	<ul style="list-style-type: none"> <li>Funding Advocacy</li> </ul>

Figure 1- Refined list of outcomes, roles and responsibilities presented to the Task Force on June 28th

These desired outcomes and needed regional-level management roles are the touchstone for the options developed, and also for the evaluation framework assessing their outcome efficacy. Our work has not assessed whether some network roles are more important or more impactful than others. Developing a clear rationale for regional priorities will be a key action to be taken by post-BRTTF processes, as the performance of the structures may be driven by the extent to which they support the most important outcomes near and long term. We have developed structure options that potentially could address all these responsibilities, acknowledging that each option will perform differently with respect to their capacity to address these effectively.

### 3. RNM Structure Options Overview

The following provides an overview of the development approach and key considerations in developing the RNM structure options.

#### 3.1 Basis for Development

We have reviewed the many proposals for regional transport governance realignment from past reports, as well as the more current proposals prepared by individual Task Force members/organizations. No option presented is intended to entirely reflect any one RNM structure presented by a member of the BTRTF members or their respective organizations.

In our view, there is no need to ‘reinvent the wheel’ on options. There is a subset of options and permutations to them for addressing the Bay Area’s unique transport governance circumstance and needs. Our team instead has taken the approach of building on the good thinking and optioneering already presented and incorporated many of the design features included in those proposals and organized the option presented herein to illustrate the key option design choices (a “choice framework”) for RNM, under which many design refinements may exist.

#### 3.2 Creating a “Choice Framework”

Reflecting on the RNM outcomes and network management roles articulated by the Task Force, the structural options have all been developed to be capable of materially advancing RNM across the spectrum of responsibilities.

Our working assumption, founded on our experience in jurisdictions across North America, is that a region’s ability to tackle the more challenging RNM responsibilities requires increasingly clearer and higher levels of authority, funding and organization to deliver. Accompanying higher levels of authority, funding and organization require more centralized organization and oversight models.

As discussed at the June Task Force Meeting, there are likely functional areas of responsibility that may be challenged to be region-wide at a comprehensive programmatic level (e.g. implementation of a region-wide bus transit priority program), but for which some elements (e.g. lanes or signals in cities or subareas, on a project basis) may be feasible to address through well-coordinated cooperative planning regimes.

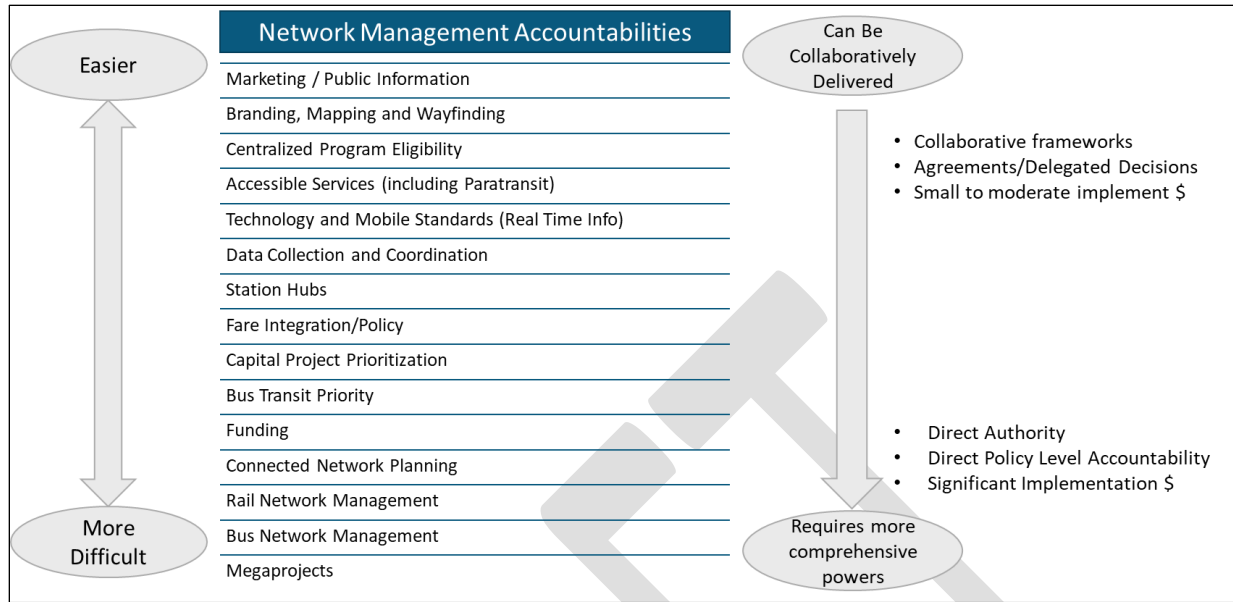


Figure 2 – conceptual mapping powers needed to achieve more difficult accountabilities

Our working hypothesis is that achieving some of the higher impact or transformational RNM roles (regional bus or rail) *in full* may require greater authority, funding, central organization to effectively deliver. The primary purpose of the business case will be to test that and assess *how much more* benefit and *at what cost/impact*, as well as general implementation feasibility and timing.

At the June 2021 BTRTF meeting, we presented four options for discussion to address RNM, as outlined in **Error! Reference source not found.** Each of these are described in detail below in the assessment evaluation section.

- Management versus Manager:** the extent of authority that the RNM organization has and therefore the completeness of its capability in realizing the full range of NM program outcomes from easy to hard; and then
- Aside the MTC or with the MTC:** how to organize and govern the entity (namely where policy authority lies and who has decision say).

The *Management versus Manager* choice is between:

- *“Management”* - A potentially “lighter lift” to implement RNM organization that can largely be realized through formalized collaboration within existing authorities and mandates of the region’s transit two dozen transit agencies
- *“Manager”* - Identifying and establishing a singular regional transport entity to realize full-extent RNM activities independently, requiring much more effort to implement including new legislated authorities, the reorganization of existing transit agency organization accountabilities, and MTC.

The *Aside MTC* versus *Within MTC* choice is about where decision accountability should ultimately rest for RNM accountabilities. This reflects the importance of appropriately aligning policy accountability for regional network issues, and also about balancing creation of new independent structures versus adapting existing structures.

The options consolidate the main structural elements of proposals that have been discussed to highlight what the Team believe to be the two most salient and relevant transport governance decisions to make are about RNM:

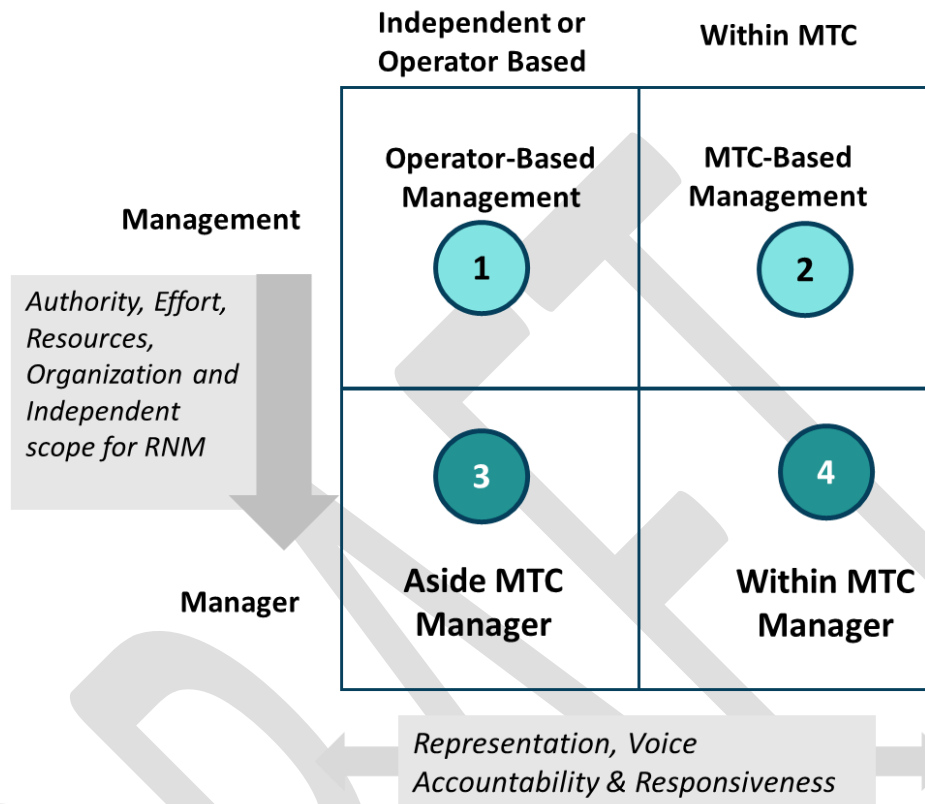


Figure 3 Structure options presented at June BTRTF

### 3.3 End States and Transitional States

Governance reform is a significant regional investment and therefore should have a long-term focus. Our working premise is that governance reform should be capable of supporting achievement along the full spectrum of RNM roles over the long term to be truly effective. A key question for the business case to address: is some form of “*Manager*” RNM required to deliver on the most important benefits desired, or does “*Management*” satisfactorily achieve the majority of benefits, for the long term?

To address this, we have developed the options and are evaluating them as theoretical ‘end states’ engaged in a practice of delivering both near and long term RNM objectives. We recognize that pragmatically, these roles and responsibilities would evolve over time.

The Task Force has expressed that there are near term ‘quick wins’ and priorities for implementation. We see all the options as capable of delivering on these quick wins. If the decision emerging from the Business Case process is that *Management* suits the region’s medium to long term needs best, then it would be reasonable to assume that steps towards *Management* and the Task Force’s near-term priorities would be advanced in parallel to efforts focused on pathways to address longer term regional priorities. Similarly, if a *Manager* approach is desired, but legislation and organization may take some time, it is reasonable to expect that some form of interim *Management* regime can be established pending new entity creation to take immediate implementation action in priority areas.

These ‘stepping stone’ approaches to implementation can be inherent to either model.

The operators’ and MTC’s respective actions to date (COVID response, Action Plan, etc.) are evidence of an ability to voluntarily collaborate. In other words, aspects of the Task Force’s near-term priorities may be readily achievable under any option/choice and *the ability act in the near term is not, in our view, a driving factor for longer term structure decision making*. The region may ‘get on with progress,’ implementing what it can today through its current cooperative processes. Structural reforms needed to tackle actions requiring higher levels of authority can proceed in parallel.

### 3.4 Option Design for “Good Governance”

In considering the structural design for the options developed, the team has considered principles for good governance for municipal/regional service provision, including transit. These are founded on best practice and our learnings and adapted for this context.

These include:

- **Clarity of purpose:** Clear mandate and authorities with unambiguous roles and the ability to advocate for and act on mandate
- **Accountability:** Political and administrative linkages at level appropriate to regional network decisions made (e.g. operations, management, or policy levels)
- **Representation and Voice:** The balance of representation is reflective of the organization’s functional and geographic mandate and reflect an appropriate balance of interests of constituents
- **Transparency and Responsiveness:** Public and stakeholders have a clear understanding of the governance / decision-making process and decision-makers are accessible to constituents
- **Efficiency:** Is capable of making cost-efficient processes and timely decisions in the regional interest

Three considerations with respect to these principles are particularly material at this stage of evaluation:

The first is on the matter of *local* versus *regional* accountabilities. In the June BTRTF Ad Hoc workshop, we highlighted the importance of and explored how to clearly define the placement of local and regional decision accountabilities between the future RNM and local operators (e.g. developing and implementing a Connected Regional Network Plan will require collaborations on setting priorities and common approaches that build on local best practices, while implementation would occur more actively through local programs). Establishing these ‘boundary conditions/decisions’ that rest with respective bodies will be important to gaining clarity and acceptance. We note that with so many agencies in the region there will necessarily be grey areas, highlighting the need for productive relationships and collaborations.

The second is on the matter of *representation* and *voice*. We observe based on the stakeholder interviews and discussions to date that it is not clear whether existing policy bodies strike the right balance in their current composition to oversee new RNM functions envisioned. Consideration of this feedback is important to enabling a successful governance structure under all options. There are both legislative and non-legislative approaches to address this in the near or long term.

The third point is on the matter of *policy* versus *management accountability*. A key design principle is that all structures should directly link policy decisions (e.g. decisions/guidance matters related to funding/taxation, fees, major resource allocation/service levels, priority setting, etc.) to a policy body.

These decisions should have oversight by a body with direct linkages to the electorate, primarily represented by elected officials or their direct appointees. Greater policy and financial impact require higher policy oversight. Management bodies then work within the defined objectives and directions, and any delegated authorities of the policy bodies to implement and manage systems, process, and investments.

We noted a significant challenge on aligning policy oversight under Option 1 – Operator Based Management in our June 2021 presentation. While the transit operators on a Management Board/Council each have direct accountability to their respective boards or policy bodies, there is no direct linkage to a *regional* policy body accountable for RNM decisions. While each operator could strive to make a regional interest decision, each holds fiduciary and interest-based duty to its agency which could ultimately result a decision on an RNM matter in its local/operator interest. Lack of reporting to a regionally-constituted policy body that manages regional resources and decisions, would limit an operator-based management model's scope and capability. This is because it would depend on the consistent application of resources and coordinated action of many agencies across many RNM roles where interests may diverge.

To address this issue and provide an operator-based management option with greater opportunity for regional resources and scope, we merge Options 1 and 2 into a singular 'Management' option. For working purposes, we assume that it reports to the MTC as the oversight policy body as the MTC may be allocating significant regional resources for RNM activities.

*At this point*, in the absence of a ready-to-go option for *regional* policy level oversight, and with it as a necessary condition, we have nested policy oversight of for management-level decisions under the MTC. However, we note other regional policy oversight options for the Operator Council may be possible (e.g. delegated authority or other models within MTC or aside it). The details of how a structure like this would function would need to be explored through further analyses/option development in order to better understand the trade-offs.

### 3.5 Option Permutations and Design Variants

Within this choice framework there are design refinements that can be applied to an option's organizational makeup. These permutations could include:

- **Representation.** Variations to composition of policy oversight, management or advisory bodies in alignment with "good governance" principles highlighted above.
- **Legislation and authorities.** Management options are assumed to be deliverable absent legislation however, legislative 'tweaks' could be made over time to augment or clarify authorities. Delegation of authorities by existing bodies may address gaps related to authority to ensure RNM deliver.
- **Operational responsibilities.** Operational responsibilities for moderately scaled operations could be possible under any of the options (e.g. a new regional bus service layer), either directly operated or contracted service.
- **Organizational consolidation.** There may be outcome, efficiency or good governance rationales for organizational consolidation of Bay Area transit agencies. Examination of consolidation is outside the scope of this study, but it has been raised in the proposals of stakeholders. Options 3 or 4 are capable of operating as pure Network Managers (no operations) or having partial to significant consolidations at establishment or over time.

#### 4. Assessment Criteria and Methods

The assessment criteria were developed by the consultant team and revised following input from BTRTF members, MTC staff and operators. The criteria help denote how well the structure **effectively** performs as well as **implementation** considerations.

The Consultant Team assessment of RNM structures against criteria is based on review of documents and proposals related to Bay Area transit governance pre-BTRTF, the work of the BTRTF to date, information gathered from consultant team interviews with BTRTF members and the Team's professional governance experience/judgement. This qualitative approach highlights decision-relevant information and documents the relative opportunity or challenge each option might have in achieving the stated criteria.

Table 1: (Primary decision relevant criteria highlighted in blue)

CRITERIA	DESCRIPTION
<b>Effectiveness</b>	
<b>System outcomes</b>	<b>Transportation:</b> Improves local and regional mobility outcomes per BTRTF, including ridership and user experience. <b>Equity:</b> Capable of materially advancing stated goals such as racial, affordability of access, geographic balance, etc. <b>Funding:</b> Capable of generating public confidence in outcomes being achieved, providing standing to drive new funding.
<b>Regional Governance/ Accountability</b>	<b>Oversight systems</b> embody sound principles and practices for responsiveness, accountability, transparency and trust (productive relationships). <b>Appropriately aligns oversight</b> (political versus management) with decision type (public policy versus operational). <b>For regional accountability.</b>
<b>Institutional Authority/ Capacity</b>	<b>Independence:</b> Possesses financial, policy, technical and administrative authorities to independently and expeditiously deliver on its assigned RNM mandate and duties. <b>Policy linkages</b> make direct, supportive policy and implementation connections between RNM and other formalized Bay Area growth, economic and environment mandates/organizations.
<b>Nimbleness/ Agility</b>	Can adapt pivot and adapt as circumstances change, to changing needs, opportunities and priorities
<b>Durability</b>	<b>Sustains</b> consistent singular vision, clarity of purpose, mission and resources for RNM over time.
<b>Financial (cost effectiveness)</b>	<b>Cost-effectively</b> deliver RNM outcomes at organization and system levels in its established, steady-state.
<b>Implementation</b>	
<b>Readiness</b>	<b>Deliverable in near term</b> initiating quick implementation of priority RNM, with little complexity, at acceptable initial implementation cost.
<b>Capability</b>	<b>Possess technical and organization capacity</b> to implement in transition and steady state operation.
<b>Adaptability</b>	<b>Transition state</b> , if required, sets stage for future end-state entity. Sets enabling behaviors, accountabilities and structures as 'proof of concept'. <b>Forward compatible</b> with longer-term expanded multi-modal mandate (active modes, micro-mobility, regional roads, etc.).
<b>Politically supportable</b>	<b>Broadly supportable</b> and capable of gaining necessary authorities for RNM duties; legislation and financial tools/resources from stakeholders and the public.

The financial dimensions of the assessment are captured in three areas within the criteria. It is important to distinguish between three important related but separately assessed dimensions:

- **Funding (System Outcomes)** - A net-new source of funding dedicated towards regional initiatives is a necessary condition for achieving the regional aspirations of the bay area. The makeup of a structure option will have an impact on the public mandate to generate and apply resource to regional initiatives and is assessed with these considerations.
- **Steady state costs (Financial cost effectiveness)** - Regardless of the amount or ability to generate funding, the ability to effectively deliver outcomes during a future, steady state is an important criterion. The consultant team has assessed each structure's likely ability to achieve this at a reasonable cost to the region.
- **Transition costs (Readiness)** - As an implementation criterion, the start-up costs have been assessed at a high level considering the ability to overcome these initial hurdles and proceed to implementation swiftly. Each structure will perform differently under this criterion.

While the criteria are not weighted, some dimensions of the assessment relate to more relevant questions for this phase of option development before proceeding with a more detailed business case. Important considerations at this stage include:

- **System outcomes:** As defined by the BTRTF goals and objectives, including ability to successfully pursue and obtain dedicated regional funding, will be a key measure of benefits and how effectively the structure will advance its purpose.
- **Cost effectiveness** as a proxy for testing the benefits against the costs that will need to be thoroughly examined at the next phase of analysis.
- **Institutional authority** The extent of authority, effort, resource, and scope relative to the RNM mandate and task. To aid in that determination, the consultant team suggests focusing on which option produces a structure that possesses the right level of and is
- **Politically supportability** with constituents and stakeholders in the Bay Area.

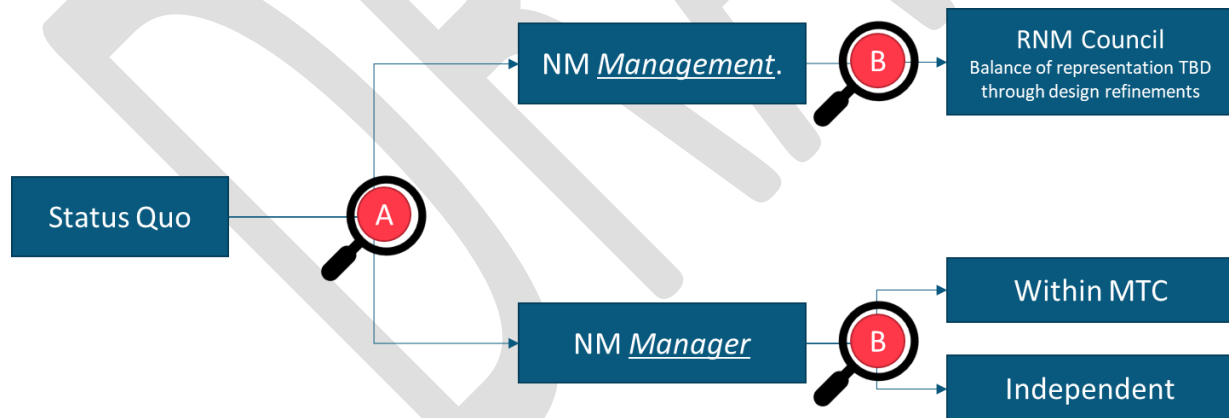


Figure 4: Decision tree

Design variants to all of the options as highlighted in section 3.5 are largely seen as downstream design optimization decision that flow from the decision on RNM scope. A material exception to this may be if there is near term momentum for operational consolidation of major regional transit agencies. This may present opportunities or requirements for Network Manager scope, design and oversight (e.g. for defining respective network-wide roles and responsibilities or defining Network Manager-Operator model options further).

### 4.1 Scoring RNM structure options

We have applied a simple assessment scale to evaluate the proposed options to the Status Quo. Scoring in the assessment (as compared to status quo) is denoted on a three-point scale as:

- Neutral or unlikely to be better than status quo: ○
- Better than the status quo with some pros/cons: ◐
- Significantly better than the status quo: ●

In some cases, more information on the function/make-up of the proposed Governance Structure would be needed to fully substantiate scoring, and these are noted. Additionally, the team notes where issues remain unresolved, and further analysis would be appropriate for the future business case.

## 5. Regional Network Manager Options Description and Assessment

### 5.1 Regional Network Management Status Quo

#### Objective

Today, regional collaboration is achieved through an ad hoc model of regional consensus and shared decision accountabilities with MTC, transit operators and many city and county stakeholders. Regional initiatives have been overseen by groups and task forces such as the recent BTRTF, Fare Integration Task Force, the Clipper Executive Board and the MTC Transit Sustainability Project Implementation. These active collaborations, especially during the COVID pandemic have achieved notable progress, forecasting positively for regional momentum building. Strong shared commitments among Blue Ribbon Task Force members to the BTRTF outcomes may further strengthen agency collaboration, resource sharing, and potential intra-agency efficiencies.

#### Mandate, Authority, and Decision Accountability

Authorities for transit network management rest with more than 25 transit operators in the Bay Area. MTC has the mandate and authority to plan, finance and coordinate transportation regionally. MTC implements the State legislated transit coordination requirements through Resolution [Res3866](#). It contains three key elements: (1) transit coordination implementation requirements applicable to 511 traveler information, regional transit hub signage, Clipper® implementation, maintenance of coordinated service, transit rider surveys; (2) fare and schedule requirements; and (3) regional transit information displays.

MTC is accountable to the public by way of elected officials or their appointees who have voting rights on the commission. Transit operators are responsible for delivering operating infrastructure, setting services, routes, policies, and fares. Some transit operators oversee both local and regional routes. They are accountable to their respective transit boards, comprised of elected officials (BART, AC Transit ) or appointees (SFMTA). These boards are accountable to the public and their riders within their respective governing electorates through municipal, county, or transit district elections.

#### Funding and costs for regional collaboration

Transit operators and the MTC collaborate through a number of forums, which has stepped up during the pandemic and required additional resourcing by individual authorities. Transit operators have informed the consultant team that this is not sustainable in the medium to long term.

#### Funding for regional initiatives and implementation

While MTC covers regional costs, operators are expected to cover the costs and implement their own coordination roles and responsibilities. This has meant leveraging existing budgets in coordinated effort to achieve regional outcomes, such as the cost of transfer fares. There is no currently dedicated source of regional funding, specifically targeted to regional initiatives.

#### Representation

The Metropolitan Transportation Commission is governed by mostly elected officials from either municipal government or county supervisorial boards. With a mandate to plan and coordinate multiple modes of transportation in the Bay Area, the Commission's representation has evolved over time to fit an expanded scope.

Transit Authorities do not have direct linkages or representation on the Metropolitan Transportation Commission. However, transit agencies may have board members that also sit on the MTC by virtue

their positions on supervisory boards, or city councils. This means neither BART nor AC transit are likely to have representation because of their own directly elected boards.

Operators are commonly described as being ‘large’ or ‘small’ defined as having ridership greater or less than 5 million boardings per annum. They are not directly represented on the Commission but have several indirect avenues to report and collaborate with MTC. MTC hosts the Bay Area Partnership Board and various standing technical regional working groups that transit operators participate in (such as the Transit Finance Working Group). Additionally, the operators meet within their respective groupings, collaborate frequently and sometimes report to groups such as the BTRTF representing the views of their small/large operator peers.

An example of formalized oversight, direction and subject-specific decision making occurs through the Clipper Executive Board. It is composed of GMs from large and small operators plus MTC’s Executive Director and has a narrow policy scope. The Executive board consists of six large and two small operator representatives.

The MTC also has a Policy Advisory Council composed of appointed Bay Area residents, which directly advises the commission on a range of topics including regional planning, housing, land use, greenhouse gas reduction, public transit improvements, and new revenues for transportation in the Bay Area. The Council has two sub-committees focused on Equity and Access as well as Fare Coordination and Integration.

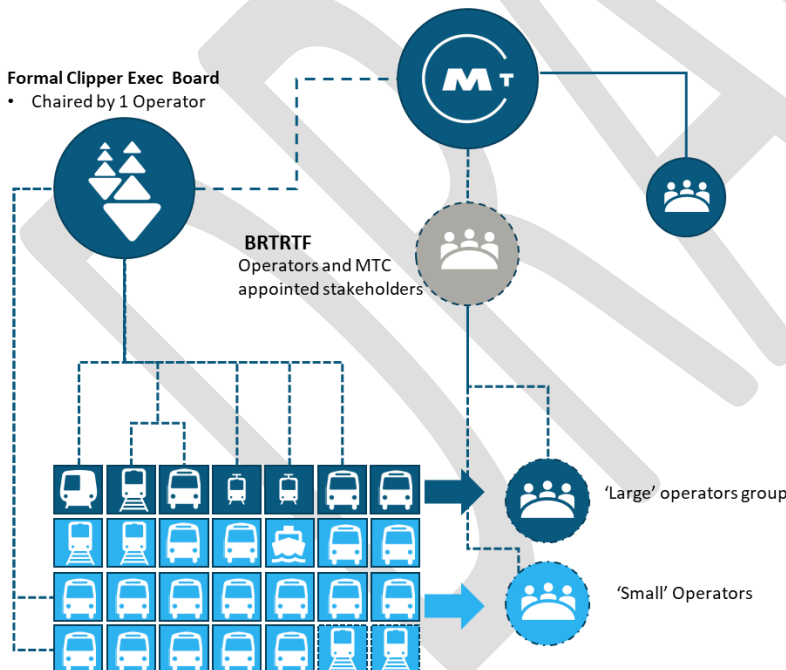


Figure 5 – Conceptual structure of existing MTC – Operator reporting linkages

## 5.2 Network Management | (Formerly Design Options 1 & 2):

### Objective

The *Network Management* Option builds on the momentum of BTRTF and Operator Forums for coordinated and structured decision making on defined RNM actions. It seeks to go beyond the status quo “collaboration” to formalize centralized and comprehensive leadership on regional transit coordination. This works within the existing legislative framework and respective authorities’ implementation tools.

### Mandate, Authority, and Decision Accountability

In the good governance principles laid out, formalized RNM requires accountability to a regional policy body to affect regional decisions effectively, and to tackle more difficult or costly NM decisions. This is a necessary condition.

There may be a number of options to establish this regional policy accountability. For the purposes of this analysis, the MTC is assumed to be the policy body. At this time, it is the only regional transport body ‘ready-to-go’ able to provide this oversight. With time, other variations of policy oversight could be explored such as creating a new policy oversight body within the MTC, or aside it.

For the purposes of this evaluation, the MTC could act as the ultimate accountable policy body, taking recommendations from a Network Management Board/Council. The MTC has fiduciary responsibilities for regional funding allocations upon which RNM may in part rely on, and would need to remain accountable for where regional dollars are spent. To formalize this relationship with the *Network Management* body, MTC could publicly resolve to work on specific set of activities directed by the BTRTF action plan, setting timeframes, and delegating decision recommendations to a Board/Council. This would grant the Board/Council a clear mandate and scope for regional network management, while simultaneously outlining where transit agency boards would retain authorities that could not be fettered by the regional network management Board/Council nor MTC. These clearly defined boundaries would delineate which initiatives the group would have license to recommend which MTC-controlled funds would be allocated towards in service of regional objectives.

In this respect, existing powers and decision authorities are largely intact, although a formal authority and mandate to act is delivered through a Regional Network Management body by delegated agreement, rather than held across more than two dozen authorities.

In the near term, the sphere of influence in *Management* may be focused on the roles, responsibilities and actions identified by the BTRTF, including but not limited to:

- Marketing / Public Information
- Branding mapping and wayfinding
- Centralized program eligibility for accessible services and discounts
- Fare and service integration

RNM roles would grow over time as regional expertise, and new funding and authorities grow.

There may be some challenges to establishing authority in this model.

- It relies on clear delineation (and agreement with two dozen operators) on the ‘boundary conditions’ of local/operator versus regional decision accountability.

- It may be challenged to advance actions where there is no consensus from respective transit boards. Specifically, those areas requiring significant amounts of funding and resource prioritization or where policy or implementation interests diverge, and where agencies ultimately retain authority and can choose to opt in or out.

### **Funding needs and costs for RNM administration**

Resourcing for this structure option would be a step up from the status quo. It assumes permanent staff, either with dedicated FTEs, project staff and/or with seconded/reimbursable staff from operators. It is also anticipated that the consultants will be required on an as-needed basis and dedicated funding for resourcing costs would be provided by MTC on a case-by-case basis.

### **Funding for initiatives and implementation**

Implementing priority actions and initiatives will require shared implementation and capital costs. In the near term, reprioritization of existing funds, redirecting MTC funding or seed funding (in part or full) from federal stimulus, could potentially fund regional initiatives. A sustainable source of regional funding streams will be necessary to deliver on some of the larger and more long-term actions identified by the Blue Ribbon Transit Recovery Task Force.

### **Structure and representation**

It is envisioned that the makeup of the RNM Board/Council would, be composed of several key individuals representing transit agency interests. However, the final composition and makeup of the Board/Council is subject to design refinements and could vary in how it is constituted in terms of number of operators or appointees. The Council would work under the policy guidance in an adopted Regional Transit Vision and supporting plans and policies adopted by the policy body (e.g. MTC or other) and would be charged with making implementation policy recommendations and overseeing program management, delivery and progress. The Council may have some authorities delegated to it to aid timely implementation.

There are two broad representation approaches, neither of which require legislative mandates:

- 1) Operator-Based Council – this is bringing primarily operations-based perspective and expertise to recommendations and implementation.
- 2) Stakeholder-Based Council – this is bringing broader stakeholder and community interest and perspectives to the Council, which may include operators, to guide recommendations and implementation.

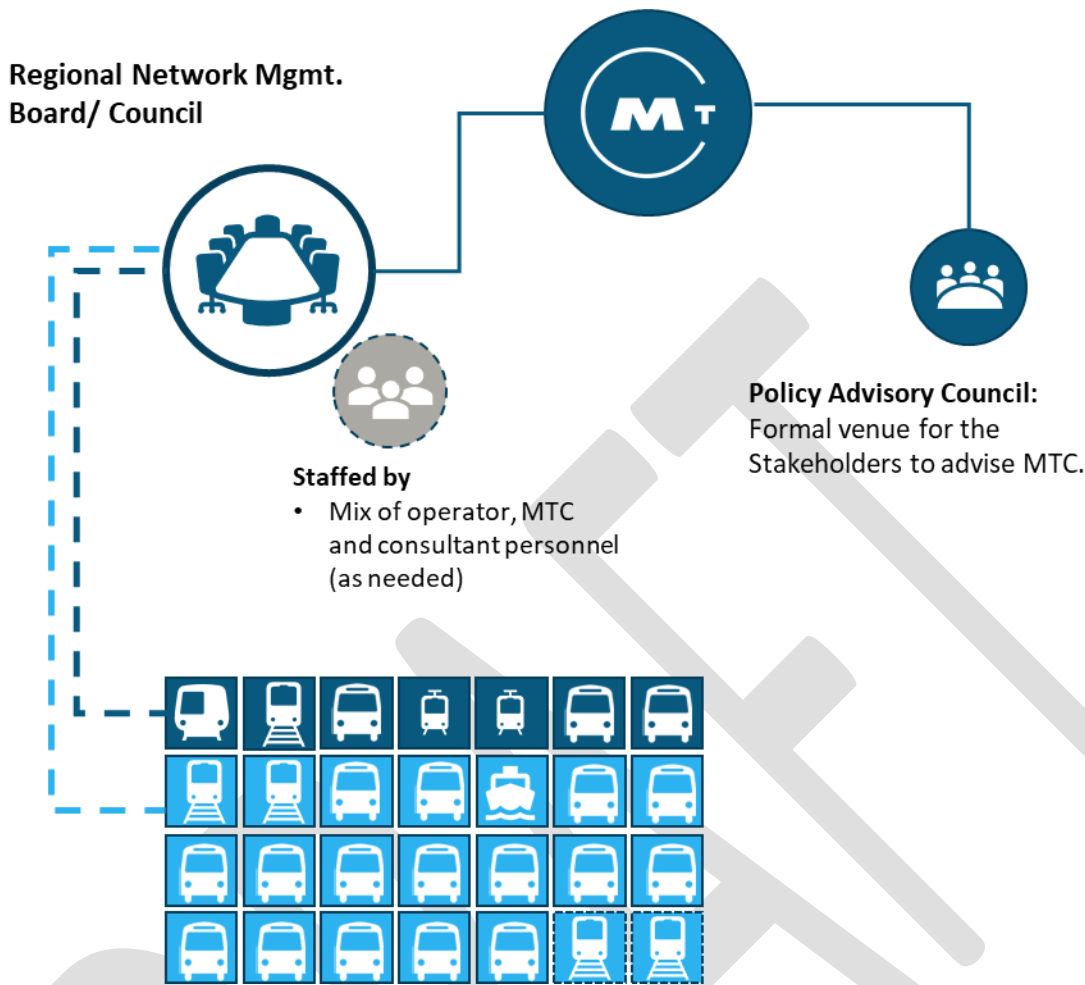


Figure 6 - Conceptual structure of Network Management Board/Council reporting structure

#### Outstanding questions and unresolved issues:

- **How would disagreement on decisions between the RNM and individual transit boards be resolved?**

Under a *Network Management* Structure, transit operators remain accountable to both their local boards as well as the MTC on regional initiatives. There would likely be overlap, or lack of full definition in some areas of decision accountability between these boards. It is not clear at this stage if adequate decision accountability delineation could be agreed upon between all 27 agencies. If disagreements did arise, processes would be needed to identify which decision authorities take precedent if MTC-adopted decisions are not binding on operators.

- **When and how would new funding be secured?**











This option also relies on extensive dialogue and collaboration for funding initiatives. The Board/Council structure could be positioned and empowered to pursue new regional funding sources. Securing new, dedicated regional funding through a ballot measure, is unlikely to be obtained before 2024, and will require MTC sponsorship. Additionally, if the Council primarily or solely consists of operators, they may be constrained or restricted from direct lobbying and using government funds to solicit support for new funding sources.

- **How would the Network Management body evolve to tackle larger, more challenging initiatives?**

Currently the sphere of influence for *Network Management* is likely to involve RNM objectives as defined in the Transformation Action Plan as near-term priority actions. It is unclear how this structure would effectively pivot to new mandates over time.

DRAFT

## Appendix A – Preliminary RNM Option Evaluation Assessment

Criteria	Assessment – Option 1/2 Network Management	Finding
<b>System outcomes</b>	With appropriate mandate and authorities, the body can advance many of the RNM <b>transportation</b> initiatives aimed at increasing ridership and improving customer experience. System outcomes focused on <b>equity</b> may be more limited by the accountability structures of the potential council members. Public interest in <b>funding</b> measures for new NM may be possible but may be more challenging to propose and succeed on.	
<b>Institutional Authority</b>	This structure would allow the management option to <b>progress independently</b> and progressively on several key RNM workstreams. Lack of identified regional <b>funding</b> and fuller authorities/organization for more challenging matters may limit Management's scope and pace of action. Representation of operators in either Council brings ready-made operation and delivery expertise into NM, and builds organizational <b>policy linkages</b> . Having decision-making (or recommending) body composed of individuals who serve multiple governing interests to whom they hold primary accountability can blur accountability lines, or potentially dilute regional interest decisions.	
<b>Financial (cost effective)</b>	Leveraging and formalizing the collaboration in the Bay Area on a defined list of activities should allow a right sizing of effort, (i.e. scaling up or down shared resources as needed) resulting in a more <b>cost-effective delivery</b> of outcomes and organizational administration. There will likely continue to be some duplication and redundancies of networks and systems, as well as organizations. Many participants in complex project decision-making (e.g. rail) may increase project complexity, time, cost.	
<b>Politically supportable</b>	While there is <b>broad public support</b> for many of the BTRTF initiatives in the Bay Area, there isn't a clear preference for an ultimate end-state structure. The benefit to this proposal is it is pragmatic and workable (at least in the short-medium term) solution that could deliver actions to desired by the public and stakeholders. There may be very different levels of support of Operator or Broad Stakeholder-based models amongst those groups.	
<b>Governance</b>	This option's ability to <b>embody sound governance principles</b> requires careful consideration. With MTC acting as the policy body, this should <b>appropriately align oversight</b> on regional policy matters to a regional policy body. Other oversight options may be feasible. Ensuring appropriate representation/voice in decision-making particularly with more challenging NM roles requires consideration. Requires agreement among many parties to establish boundary conditions for operator/local vs regional decisions. Requires broad support, achieved consistently across many Council participants with primary accountability to their agency/interest. May result in suboptimal regional decision or no decision. Decision process and ultimate accountability may not be transparent to public/constituents.	
<b>Nimbleness</b>	By virtue of structuring a mandate around a fixed set of initiatives, the decision-making ability of this group will be confined to areas resolved by the MTC as the boundaries of RNM activities. This will hinder the ability to adapt to emerging directives, without new broadly supported agreement. At the same time, there remains opportunity for separate collaboration on certain types of initiatives that may over time.	
<b>Durability</b>	This structure should be able to <b>sustain a consistent, singular vision</b> and purpose short to medium term. Challenges may arise as more difficult NM roles are tackled. There may be challenges related to forging consensus between agencies of diverse sometimes divergent interests and vision.	
<b>Readiness</b>	A Network Management structure can be <b>deliverable in the near term</b> , able to implement priority actions and build on already established momentum. It is able to do so leveraging existing organizational resources, supporting quick and cost effective implementation	
<b>Capability</b>	Properly resourced, this structure would possess some of the requisite <b>technical and organizational capacity</b> to address the roles and responsibilities. Some operation and technical competencies can be shared between agencies and built within the Council and more broadly MTC over time. New capabilities to address <b>regional</b> planning and implementation will need to be built over time.	
<b>Adaptability</b>	A <i>Network Management</i> structure is well positioned to act as a testbed for amassing more authority, responsibility, and mandates in the future to be able to <b>transition</b> into a <i>Network Manager</i> . This structure is forward compatible with the range of transit focused responsibilities but may struggle long-term to take on new transportation system roles and responsibilities (e.g. other modes).	

## 5.3 Network Manager | Design Option 3

### Design Objective

Option 3 proposes a new agency, separate from the MTC with independent powers and authorities to lead Regional *Network Manager* activities in the Bay Area. To centralize accountability, authority, and supplement organizational resources within a reformed governance framework, Option 3 proposes a new, separate, and stand-alone entity with the legislated authority to lead a full suite of RNM initiatives. Specifically, activities that require a greater extent of authority, resources, and organizational energies relative to *Network Management* (such as implementing bus and rail management reforms, major funding and capital project prioritization).

While the new entity does add a new organizational structure to transit governance in the region, its purpose can be viewed as consolidating the current Regional NM roles held by two dozen agencies in part or full into one agency. The benefits would be to reduce existing duplicative efforts, create a strong decision authority to enhance regional decision efficiency and effectiveness, and support distributional compromise that would otherwise be subject to extensive debate. This option also provides a measure of independence for a regional forum that could build evidence-based support of transit initiatives in response to trips that cross jurisdictional boundaries. Sitting “aside the MTC” means that it has a clarity of purpose not diluted by the broader functions of an MPO and the interests it serves. These productive MPO-transit agency relationships are demonstrated elsewhere, for example in Los Angeles, Seattle, San Diego (and under different regulatory and legislative frameworks Vancouver and Montreal).

### Mandate, Authority, and Decision Accountability

As principle, this structure would be set-up as a policy body with accountability to the public – that is, officials on the governing board are primarily elected official or directly appointed as delegates. As MTC currently has the mandate and some authority to plan, finance, and coordinate transportation, some of these powers may need to be transferred to the new body to avoid conflicting mandates. As well as the activities advanced under a *Network Management* Option, this new authority would be empowered through legislation to implement and undertake larger mandate and more complex activities such as:

- Comprehensive bus transit priority
- Bus/Rail reforms,
- Capital project prioritization and
- Project delivery and oversight.

### Funding for RNM activities

It is envisioned that this new entity would be funded through a new, dedicated regional source likely approved through ballot measure in 2024.

With legislated powers, this structure would have the authority to coordinate with stakeholders and seek voter approval of new RNM funds. This control of purse would also extend to direct or influence a reprioritization of some existing funding, now controlled by various entities.

### Structure and Representation

As a new agency separate from the MTC, this new entity with independent powers and authorities may take the form of a special district or other legislated structure. This built-for purpose board/oversight committee would make public policy decisions concerning regional network management. The entity would need all-new staff and would need to recruit to build technical and administrative capacity. The experience of other regions is that this expertise may come from pre-existing or predecessor agencies, bringing institutional knowledge and operating expertise and allowing for cross-fertilization of ideas. As a policy body, it is necessary to have political

representation in order to remain publicly accountable, but the board/oversight committee could encompass subject matter appointees or representatives from the Bay Area’s transit operators.

### Regional Network Manager Governing Board

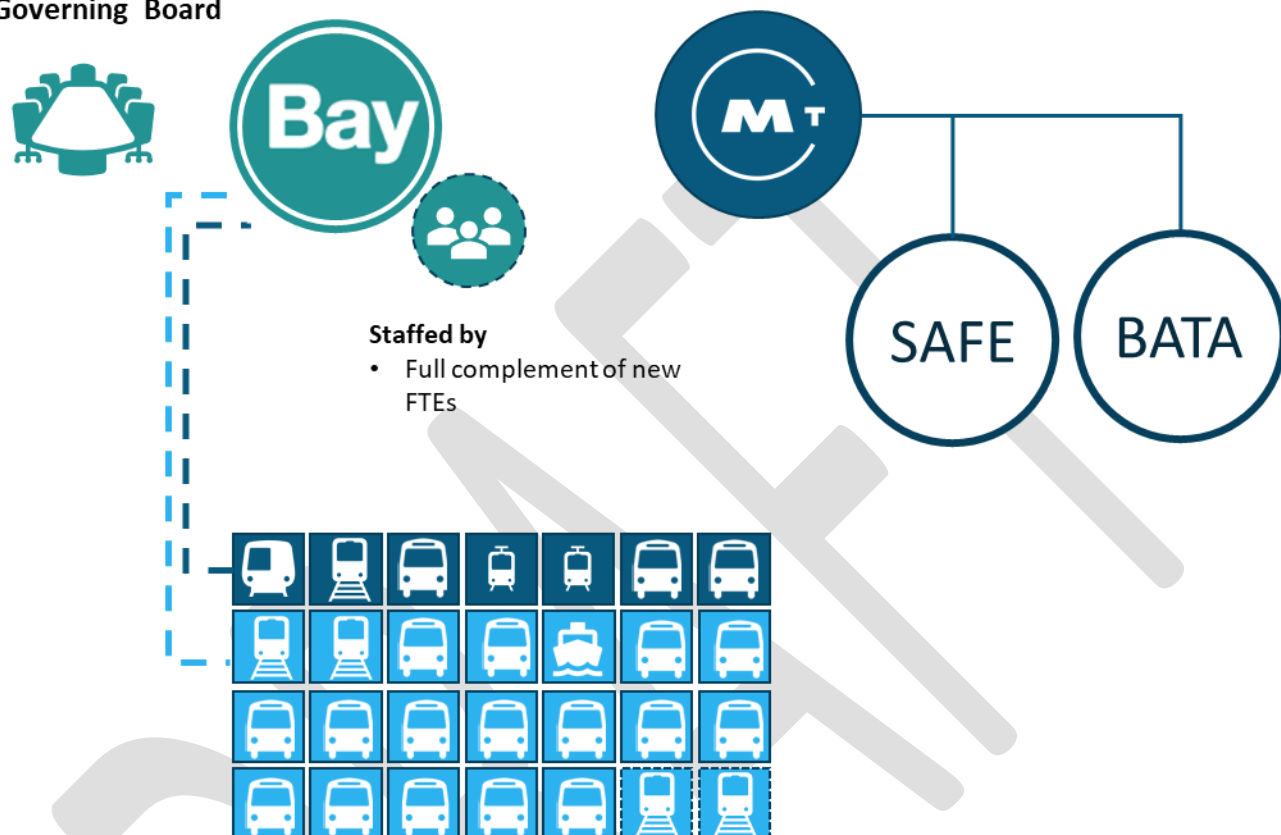


Figure 7 - Conceptual structure of Network Manager governing board

### Outstanding questions and unresolved issues











- Are there likely to be efficiencies in standing up a new Network Manager entity in the Bay Area?**  
 The cost and resources involved in setting up a new independent entity are substantial but not unprecedented in both pure network manager and network manager-operator forms (Montreal, Seattle, TransLink, LA Metro). There is an assumption that consolidation of capital planning and program delivery, sequencing, regional business casing, and funding would provide efficiencies, however this assumption would need further assessment examining costs and marginal benefits. An on-going challenge with this structure option will be to ensure a new entity is lean enough to capture efficiencies while managing the total costs of operating the new regional entity.
- How would a new entity interface with the Bay Area’s other transportation, planning and policy authorities?**  
 As a purpose-built entity -the design of the governance structure may lend itself to developing or maintaining strong policy linkages. The Sound Transit Board (made up of Agency board representatives) is an example of a structure that is effective in achieving these linkages through program and policy

governance coordination. As MTC would remain the MPO and designated recipient of FTA funding, it is unclear if another entity competing for with existing agencies for funding would present a challenge in the Bay Area.

- **How and when would a structure like this emerge?**

There are several pathways for transition that would dictate how a new entity might evolve over time to adapt to an expanding mandate. It is difficult to anticipate under what conditions moving to Option 3 would be advantageous in the short term, but there may be benefits as priorities shift beyond the initial short-term priorities of the taskforce. In the near term the timing, resource, and political sensitivities will affect uploading localized responsibilities to a new entity.

## Appendix A – Preliminary RNM Option Evaluation Assessment

Criteria	Assessment – Option 3, Independent Network Manager	Finding
<b>System outcomes</b>	As a built-for purpose entity, with clear policy direction to deliver desired RNM <b>Transportation</b> outcomes this option should be able to perform effectively to deliver the full suite of RNM roles and responsibilities. Similarly, with clear regional equity objectives defined, and funded sufficiently, this structure should allow for the advancement of regionally <b>equitable planning</b> , policies, decision-making, and implementation. <b>Funding</b> is materially important to achieving system outcomes; a new agency could provide a transformative vision to catalyze support for funding the vision.	
<b>Institutional Authority</b>	The design of this option allows for the ability to <b>independently</b> deliver on its assigned RNM mandate and duties. However, the nature of a new entity means more energy will be required to maintain relationships with other <b>linked policy entities</b> across the Bay Area. These may take time to develop and could also be imbedded as a design refinement to ensure clear and productive policy linkages.	
<b>Financial (cost effective)</b>	While this structure would likely be able to deliver more <b>cost-effective</b> RMN outcomes over time, there are uncertainties regarding where resources would be transferred, consolidated, or streamlined between MTC and operating agencies upon the creation of a new, separate authority. It is likely that administrative and service delivery could theoretically be achieved. A thorough assessment would be needed to determine whether savings would be plausibly realigned to the Manager or absorbed as savings within agencies, or some combination; also if, how and when the system benefits might exceed the costs.	
<b>Politically supportable</b>	The political supportability of a new operating entity may depend on the benefits attributed and the degree to which the <b>public can be confident</b> network integration can be achieved with aligned fares, routes, schedules and passenger information. The challenge will be the requirement to navigate new legislation, and the ability to efficiently set a new structure with public support. There will be constituents both highly supportive, and opposed, to a new entity.	
<b>Governance</b>	There are <b>no major constraints that structurally limit this Option's ability to embody sound governance principles</b> . The structure allows for either a consolidated public policy body and implementation/operational governance system or the ability to support a political Council with a management board which would <b>appropriately align oversight</b> for different levels of regional accountability. In many ways, it provides the highest and clearest levels of accountability. Requires careful consideration to define respective mandates relative the MTC and to support productive long term regional collaboration.	
<b>Nimbleness</b>	The ability for the new structure to <b>pivot and adapt</b> to changing circumstances will be determined in part by social license conferred by stakeholders and the public throughout the region. It will time to ramp up, establish relationships, collaborate and coordinate with other agencies and engender trust in the Region. While a new entity has the benefit of being able to acquire the talent and expertise to suit the task at hand, this will take time. Nevertheless, this structure may be able to pivot towards new responsibilities such as capital delivery, new or consolidated operations, or multi-modal mandate.	
<b>Durability</b>	New Network Manger entities that have been developed in recent years have been able to endure various challenges, shocks and stressors to <b>sustain a vision</b> and iteratively build resources over time. (E.g., Sound Transit, Metrolinx)	
<b>Readiness</b>	Creating a new, separate entity to undertake RNM activities with new legislated authorities would take a considerable amount of time to implement. While some initiatives could be advanced <b>in the near term, there are risks</b> that organizational energy may be directed toward setup rather than implementation. Additionally, many RNM initiatives would require collaboration and linkages with other Bay Area institutions. These relationships will require time and focus to build and maintain	
<b>Capability</b>	Provided with sufficient funding and clear mandate, a new entity can acquire <b>technical and organizational capacity</b> , although this may require drawing from existing regional capacity in the interim.	
<b>Adaptability</b>	During the establishment of a new entity, processes and accountability structures can be designed to <b>transition</b> into <b>desired end-state capability</b> . There will be tradeoffs inherent with designing a new authority to fulfill an anticipated future mandate as not all future directives and opportunities (such as a multimodal mandate beyond transit) will be apparent at the outset.	

## 5.4 Network Manager | Design 4

### Design Objective

To centralize accountability, authority, and organizational resources for RNM within the MTC by developing new legislated powers that clearly recognize MTC as the responsible authority for implementing a full suite of RNM initiatives.

The key distinction between *Network Management* and the *Network Manager within MTC Structure Option* is the presence of new legislated authority to undertake expanded RNM responsibilities beyond what can be achieved with existing authorities. This may include adoption of substantial new powers specific to funding, bus and rail management reforms and capital project prioritization.

### Mandate, Authority, and Decision Accountability

A broader and more explicit mandate for network management would be derived from a new legislatively defined mandate, in a similar way to how the Bay Area Toll Authority was created in the late 1990s. This would also centralize authority and equip MTC with the powers and tools to undertake larger and more complex RNM activities. Decisions made under the RNM would be binding for the operators to carry out and implement. Option 4 proposes a new unit within MTC to be set up and overseen by MTC. Because MTC would remain ultimately accountable for policy decisions, the makeup of the *Network Manager* Board would not have to be composed of elected representatives because public policy accountability is maintained by a clear line to the MTC.

### Funding needs and costs for RNM administration

Housing the Network Manager within the organizational structure of the MTC may need adjusting as the entity would likely increase the MTC overall headcount with a number of new, dedicated fulltime staff. The effect is to establish a new transit organizational unit within the MTC, not dissimilar to Option 3 in technical capability, but leveraging the efficiency of existing organizational, decision and political infrastructure of the MTC.

### Funding for RNM activities

MTC would remain the MPO and would also coordinate with stakeholders to seek out new, dedicated funding sources for RNM actions. To undertake activities in the near term, resources would be needed to advance priority projects. It is assumed in the near term that all activities will need to be cost-shared or redirected from existing funding sources. One of the anticipated legislative authorities for this option would be to reprioritize and redirect funding for RNM activities.

### Structure and Representation

This proposed RNM is structurally similar to that of other MTC units or divisions such as the Bay Area Toll Authority, (administering programs and allocating revenues). Under this structure it would be possible to have a board or committee composed of transit representatives, MTC appointees or a mix of both to oversee RNM programs. MTC would maintain public policy accountability, which means there are a broad number of representation options and permutations that could be developed to serve regional transit interests.

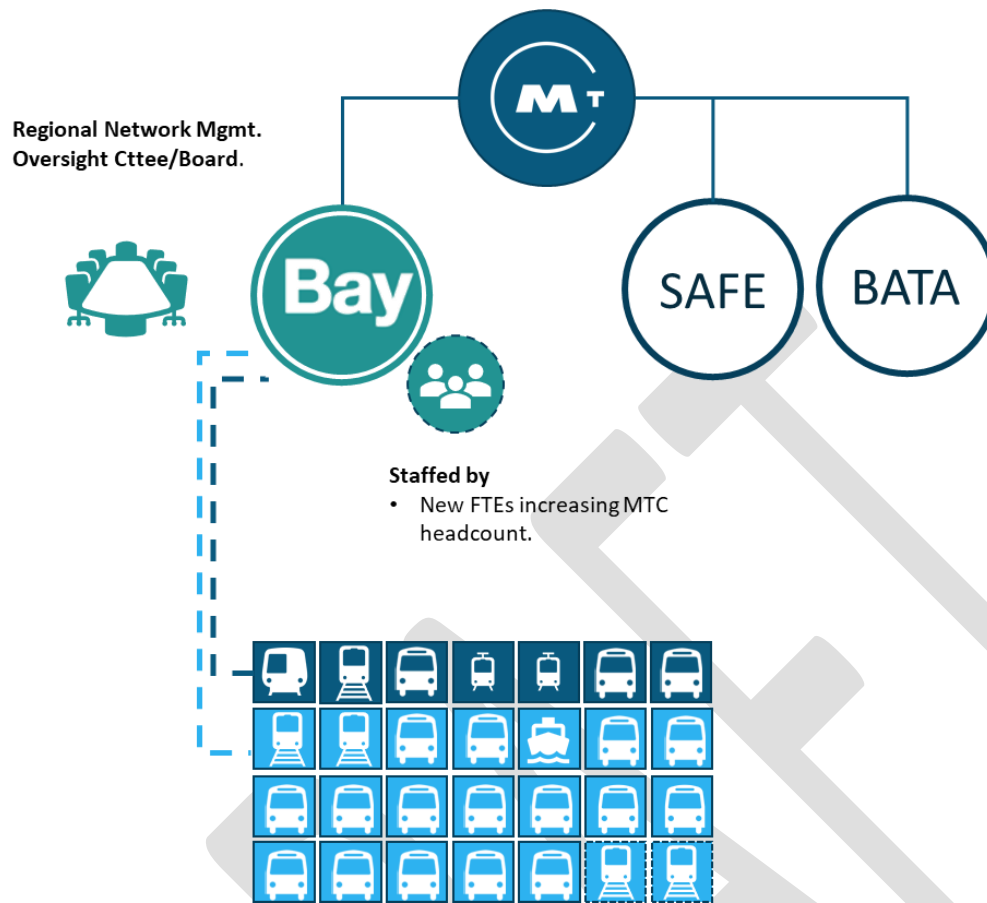


Figure 8 – Conceptual structure of Network Management Board/Council reporting structure











### Outstanding questions and unresolved issues

- **Will consolidating so many transport mandates within MTC pose challenges for maintaining clarity of mission and purpose?**

Both *Network Manager* Options (3 and 4) present distinct approaches to challenges articulated during the course of this assessment. At this time, the full set of advantages or disadvantages in housing regional network manager functions in a large multidisciplinary transport organization are not apparent and will require more detailed assessment.































- **What would be the impacts to MTC?**

Option 3 might be pursued if MTC is seen as insufficiently equipped in future capacity, governance, or representation to oversee the regional interest. While the current makeup of the MTC Commission's members is outside the scope of this analysis, there may be an opportunity to revisit representation as a design refinement to Option 4. Notwithstanding specific change to political representation, Option 4 would still require significant transformation of a mature organizational culture to incorporate a new functional need. This new combined entity would need to fairly navigate multiple missions as both MPO and RNM. While it is rare for an MPO to also operate as a transit network manager or operator, it is not unprecedented. Some MPOs (such as RTC in southern Nevada) function as dual entities.

Criteria	Assessment – Option 4 MTC as Network Manager	Finding
<b>System outcomes</b>	As a new built-for purpose unit within MTC, this structure should be able to perform effectively against RNM <b>Transport outcomes</b> provided capacity and expertise is successfully acquired. Similarly, with clear regional equity objectives defined, and funded sufficiently, this structure should allow for the advancement of regionally <b>equitable planning</b> , policies, decision-making, and implementation. <b>Funding</b> is materially important to achieving system outcomes. The MTC with a dual function as the MPO to be able to integrate decisions on funding and prioritization and generate support for new funding. With the MTC's many other accountabilities, its ability to sustain the Manager's clarity of purpose needs to be weighed against the benefits of regional transport policy integration.	
<b>Institutional Authority</b>	Designating a new Network Manager within the MTC means that the structure will benefit from <b>policy linkages</b> to planning, funding and investment decisions at the regional level. This should allow for quick decision making to progress RNM activities. While the structure is <b>not entirely Independent of MTC</b> , it does allow for a clear body with financial, policy, administrative and technical capacity for RNM activities.	
<b>Financial (cost effective)</b>	There may be several advantages of scale to housing the RNM structures within an existing entity. Some decision authority would be delegated from MTC but there would still likely need resources to set up and administer. It is expected to be able to <b>cost-effectively deliver</b> RNM outcomes over time.	
<b>Politically supportable</b>	The political <b>supportability</b> of a new regional manager within MTC will rely on the belief from the public and stakeholders that the entity is capable of gaining and administering tools, authorities and resources to successfully deliver RNM activities. To a large degree the organizational track record of the recent past and its ability to manage determine the support for Network Management in the future.	
<b>Governance</b>	There are <b>no constraints that structurally limit this Option's ability to embody sound governance principles</b> . The structure allows for clear <b>public policy oversight</b> through the MTC and can be set up to draw from Bay Area operator expertise on the board/council to ensure responsiveness and productive relationships are maintained.	
<b>Nimbleness</b>	As needs and circumstances change, this structure may be able to <b>pivot and adapt</b> to emerging directives or new mandates. The degree to which the entity will be able to pivot will depend on the willingness for MTC to fulfil the needs and gaps as RNM work progresses. There will be a balance to maintain in ensuring that focus is maintained while right sizing a new organization to fulfill the RNM mandate.	
<b>Durability</b>	While few longstanding examples of newly imbedded RNM entities exist, there is nothing to suggest housing the RNM within MTC will limit their ability to <b>sustain a mission and vision over time</b> . Having operating responsibility for tolls, Clipper and freeway operations may be an indicator of durability.	
<b>Readiness</b>	With several mandates and authorities to coordinate transportation in the Bay Area, the MTC is well positioned to advance RNM activities <b>in the near term</b> , provided they have broad support from operators and stakeholders. More legislative authority may be required over time to advance a full suite of activities, but this needn't halt progress on achievable, short term actions.	
<b>Capability</b>	While not currently structured or resourced to deliver a full suite of RNM activities, <b>technical and organizational capacity</b> could be acquired locally or recruited more broadly in the short term.	
<b>Adaptability</b>	As a large regional organization, the MTC should have the ability to prepare for and effect change in the Bay Area's transportation through a <b>transition phase</b> . Processes and accountability structures have been changed in the past to adapt to new mandates; Sets the stage for an option to build trust and centralize leadership to be <b>forward-compatible</b> with a future Network Manager.	

## Assessment Summary Table

This table provides a comparative summary of the differences between the options, more detail on the assessment of each structure is contained in the preceding sections of the report.

Criteria	Option 1/2 Management	Option 3 Manager (independent)	Option 4 Manager (MTC)	Summary Comments
<b>System outcomes</b>				Delivering on the full suite of regional system outcomes will be more challenging under the Network Management option. Management is primarily within the existing legislated framework and thus has less authority to implement the more challenging network responsibilities or ability to generate new regional funding.
<b>Institutional Authority</b>				The Network Manager options would be purpose built with the financial, policy, technical skills to address the full range of regional roles and responsibilities.
<b>Financial (cost effective)</b>				Option 4 is potentially more cost effective because it will be able to make use of existing MTC resources for certain functions, and over the long term able to harmonize expenditures that might today be duplicative.
<b>Politically supportable</b>				All options are likely supportable by some stakeholders across the region in different ways and each have unique acceptance challenges.
<b>Governance</b>				The potential for conflicting perspectives and priorities may emerge from the dual accountabilities (local and regional) under the Network Management model.
<b>Nimbleness</b>				Each option provides some qualities that would enable nimbleness, though each is different. Network Management is challenged in terms of the need to get consensus to a high common denominator. The others may have more rigid roles as prescribed by legislation/mandate.
<b>Durability</b>				The purpose built and legislated Network Manager options would have greater durability as its mandate and powers are prescribed in law. Network Management models relying more heavily on consensus-based decision-making and sustaining/renewing agreement between many parties on its mandate and priorities.
<b>Readiness</b>				Drawing on a range of existing capabilities, the Network Management model could be advanced more quickly in the short term, whereas Option 3 would be the least ready, needing all functions to be built from the beginning and requiring greater legislative reform.
<b>Capability</b>				The technical capabilities to implement the full range of regional roles and responsibilities will need to be developed/acquired for all of the options. Management may have greater ready-to-go capability in the near term and Manager will be capable of built-for-purpose regional-scale capability over time.
<b>Adaptability</b>				If consensus is reachable, Management may be able to pivot quickly as direction is not externally mandated (via law). All options can incorporate multimodal mandate beyond transit – drawing on MTC's past experience adapting to changing mandates, Option 4 could provide the greatest/easiest opportunity to adapt in this way.

# BRTRTF

Date: 07 26 21

RNM Options Assessment and Evaluation

BLUE RIBBON

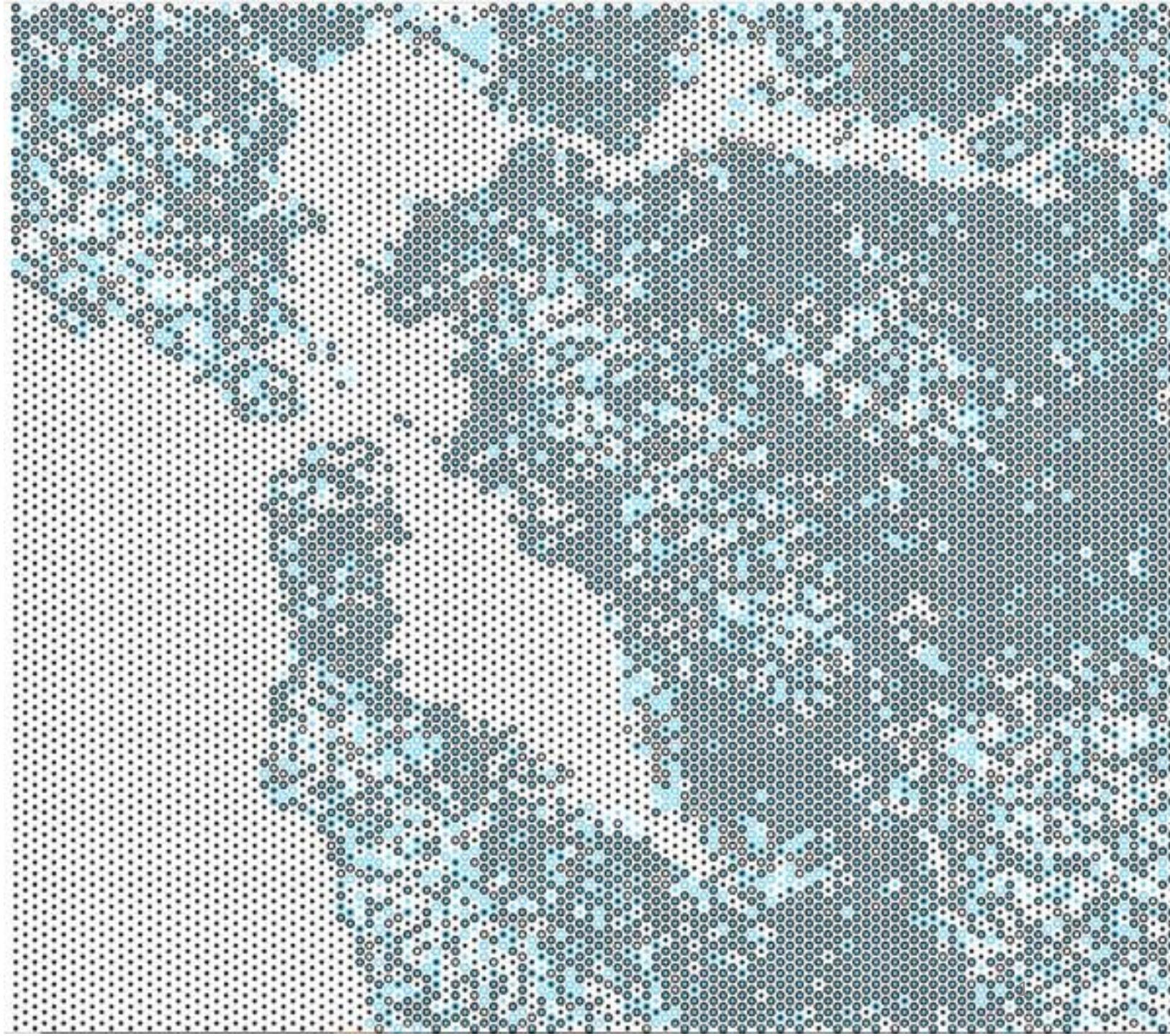


## TRANSIT RECOVERY TASK FORCE

VIA  
ACCESS.



Kevin Desmond

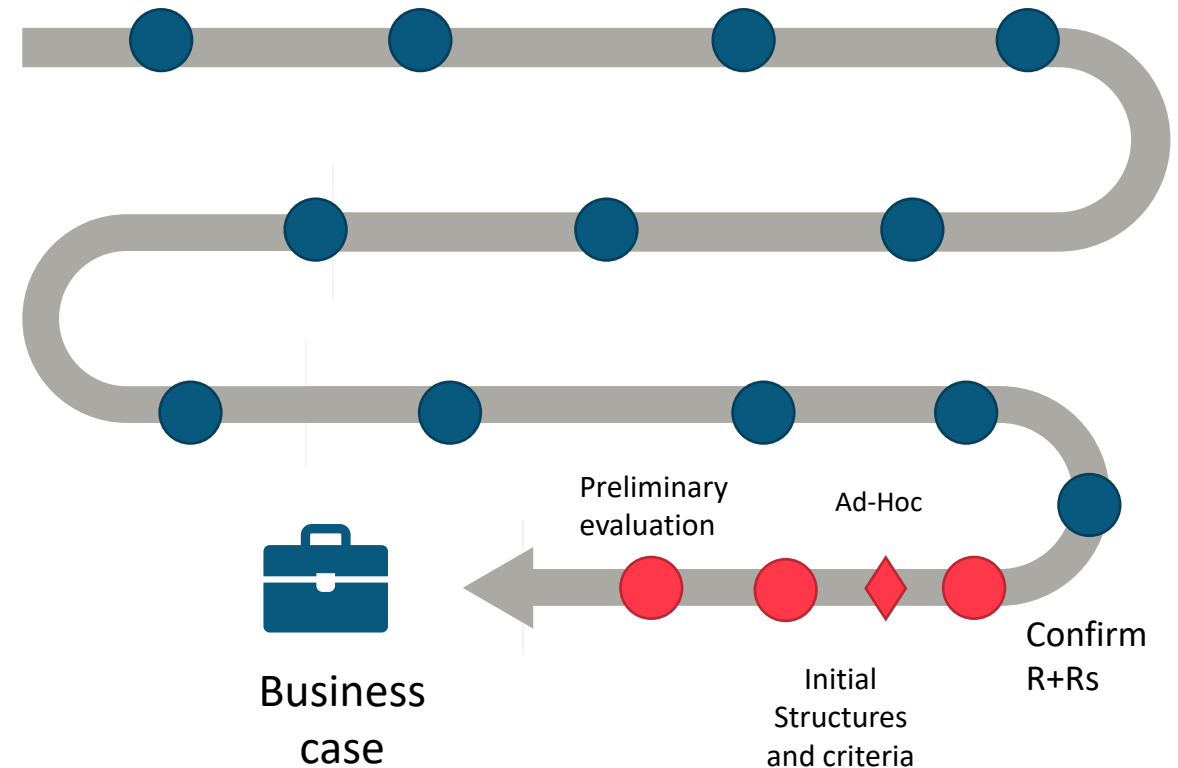


# Agenda (60 Minutes)

Item	Timing
1. Recap	5 Minutes
2. Evaluation: Approach and options	5 Minutes
3. Preliminary Assessment	20 minutes
4. Discussion	30 minutes

# Recap

- **Why, What, How**
- Audit, Confirm BRTRF Roles and Responsibilities, Outcomes (**May BRTF**)
- Regional Network Management accountabilities (**June Ad Hoc BRTF**)
- Preliminary Evaluation Criteria and Structures (**June BRTF**)



# Why are we here?

## Bay Area has a Shared Destiny

### *Interdependent*

- *Economically*
- *Ecologically*
- *Socially*

**Common problems and opportunities  
require collective action**



# Challenge...A Transit 'Patchwork'

Access and mobility is critical to Mega-Region's Success

## Today

- Local responsiveness and priorities
- Local identities

## But

- Disconnected 'pieces'
- Lack of consistent delivery to vision
- Who is responsible for putting it all together?



# From Patchwork, to Patchwork Quilt

## Features:

- Unified vision
- Parts to whole
- Cohesive
- Unique identities

## Values:

- Resourceful
- Creativity
- Usefulness

Image Credit: ETSY

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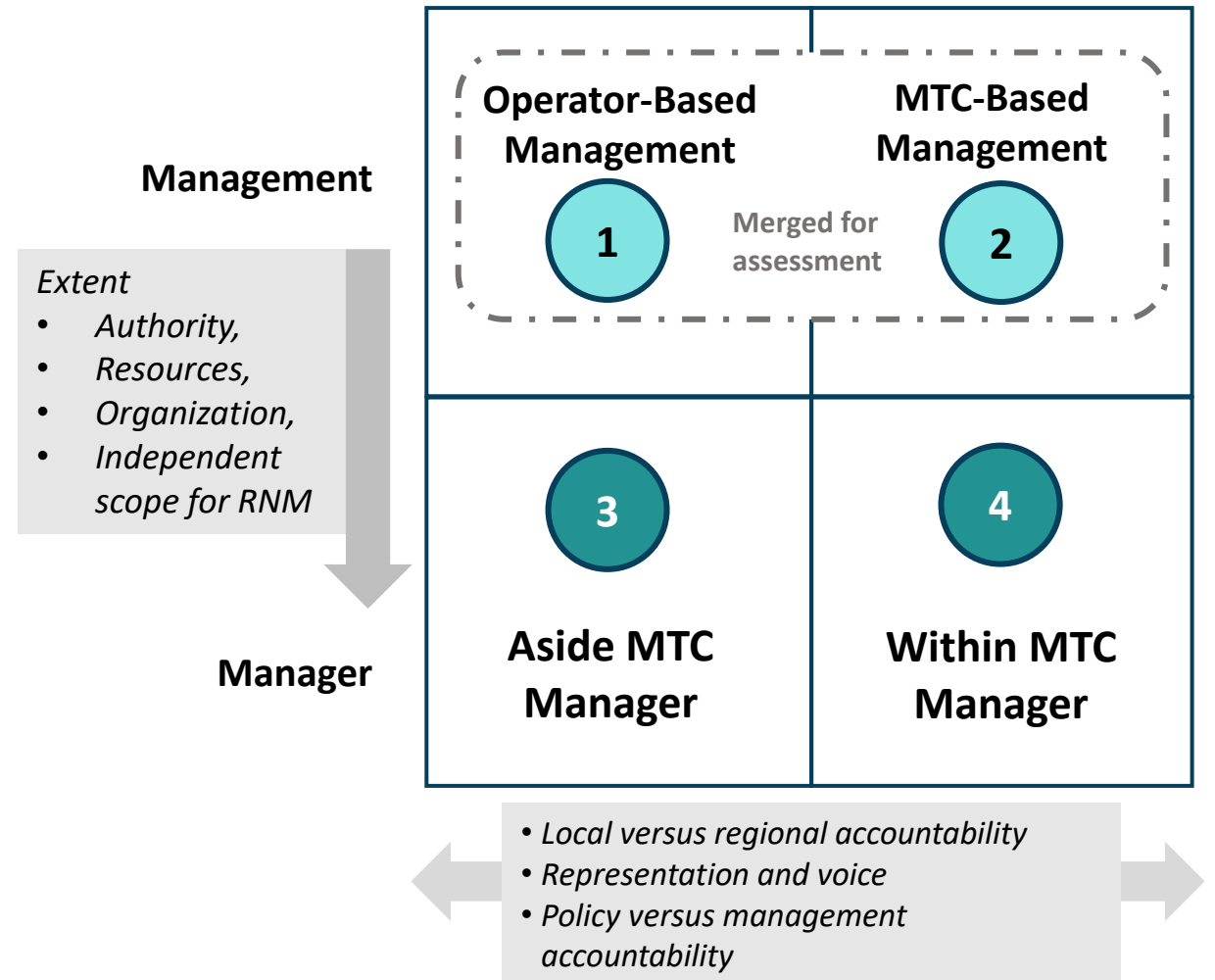
# Evaluation: Approach and Options

# Key evaluation parameters

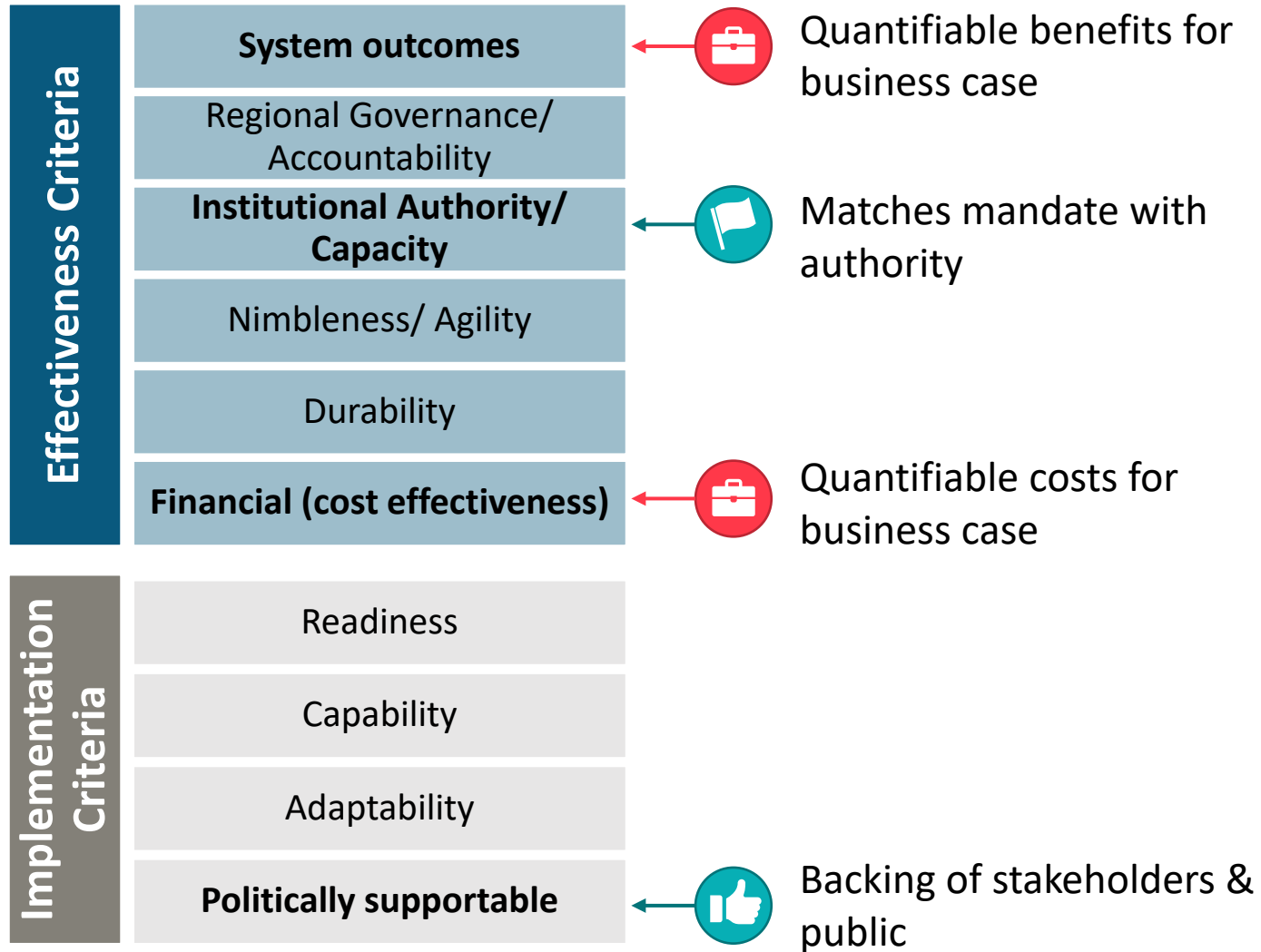
- Option evaluation in this assessment, not option selection
- All options are capable of materially addressing regional network management
- Evaluation is indicative, not definitive
- Options are consultant generated

# Process

- Creating a "**choice framework**" of distinct, viable structures:
  - Management vs Manager
  - Aside or within MTC
- Defining and following the principles of good governance
  - Clarity of purpose
  - Accountability
  - Representation and Voice
  - Transparency and Responsiveness
  - Efficiency



# Assessment Criteria



- Understanding the **decision relevant criteria** to where we are now in this phase of the project
- More detailed assessment to come later...

# Assessment Methodology

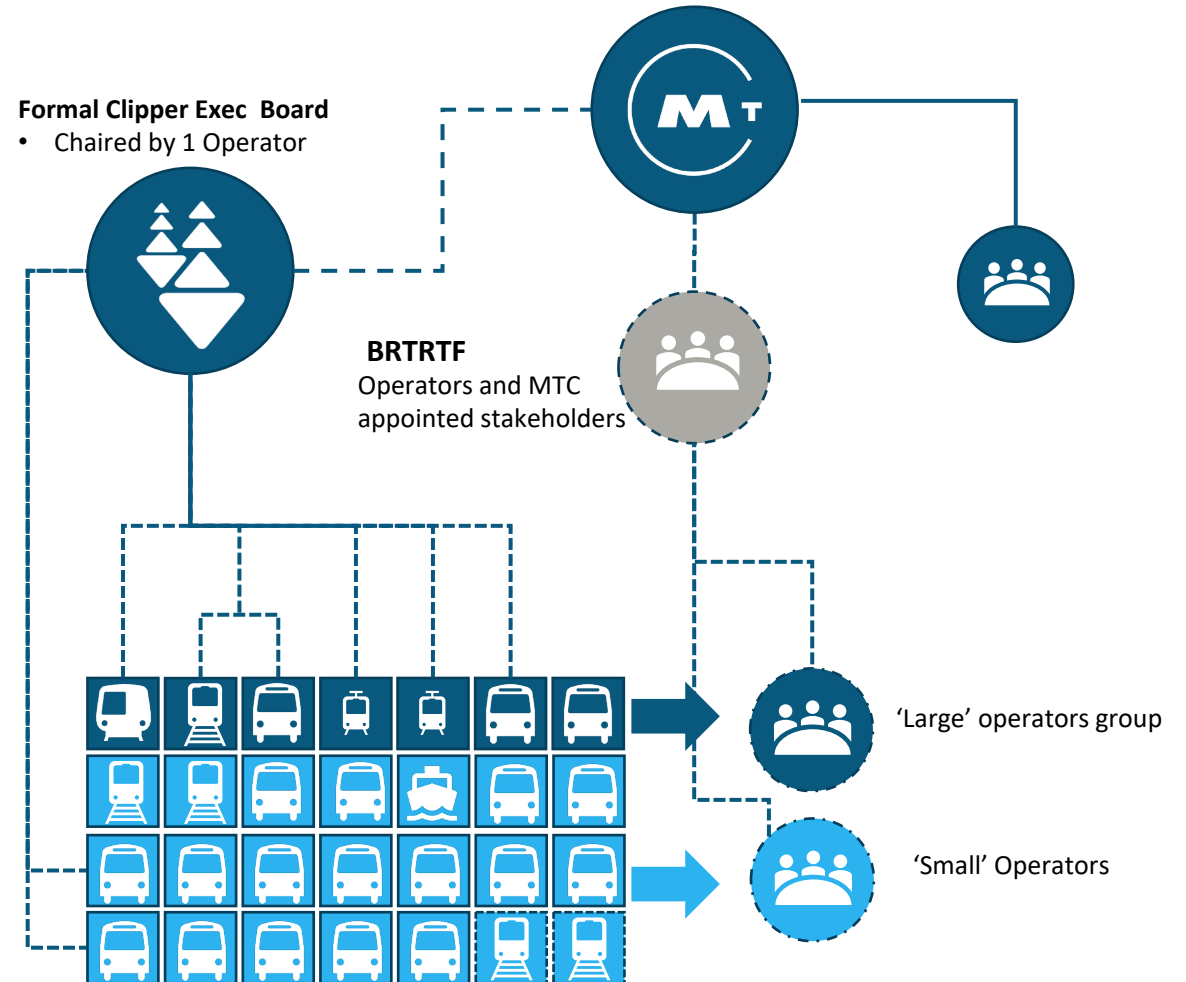
- Performance assessed against anticipated baseline/status quo, consider each option's "theoretical end-state"
- Practice, document review, literature review, interviews, team's judgement

Three-point scale:

- ☐ Neutral or unlikely to be better than status quo
- ☒ Better than the status quo with some pros/cons
- ☒ Significantly better than the status quo

# What is status quo?

- Regional network coordination occurs through various technical working groups and transit operator forums.
- There has been lots of momentum and recent regional collaboration through the BTRTF and Operator forums.
- Strong interest in formalization of collaborative structures.



# Preliminary assessment

# Network Management | (Formerly 1&2)

## Design Objective

- Build on momentum of BTRTF on coordinated and structured decision making. Centralizes leadership on transit coordination within existing legislative framework and implementation tools.

## Mandate, authority and decision Accountability

- Existing powers and decision authorities are largely intact, except formal authority and mandate to act is delivered through a Regional Network Management body by agreement or delegated authority, rather than held across more than two dozen authorities.
- MTC assumed key funder for regional initiatives, with policy accountability in line with that.
- Mandate would be provided by MTC resolution defining programs and decision authorities for Board/Council while setting boundaries on where agency boards remain sovereign.
- Alternative policy oversight bodies (within/aside MTC) possible

## Funding

- Additional resourcing for administration beyond status quo
- Shared implementation costs in near term, permanent funding TBD

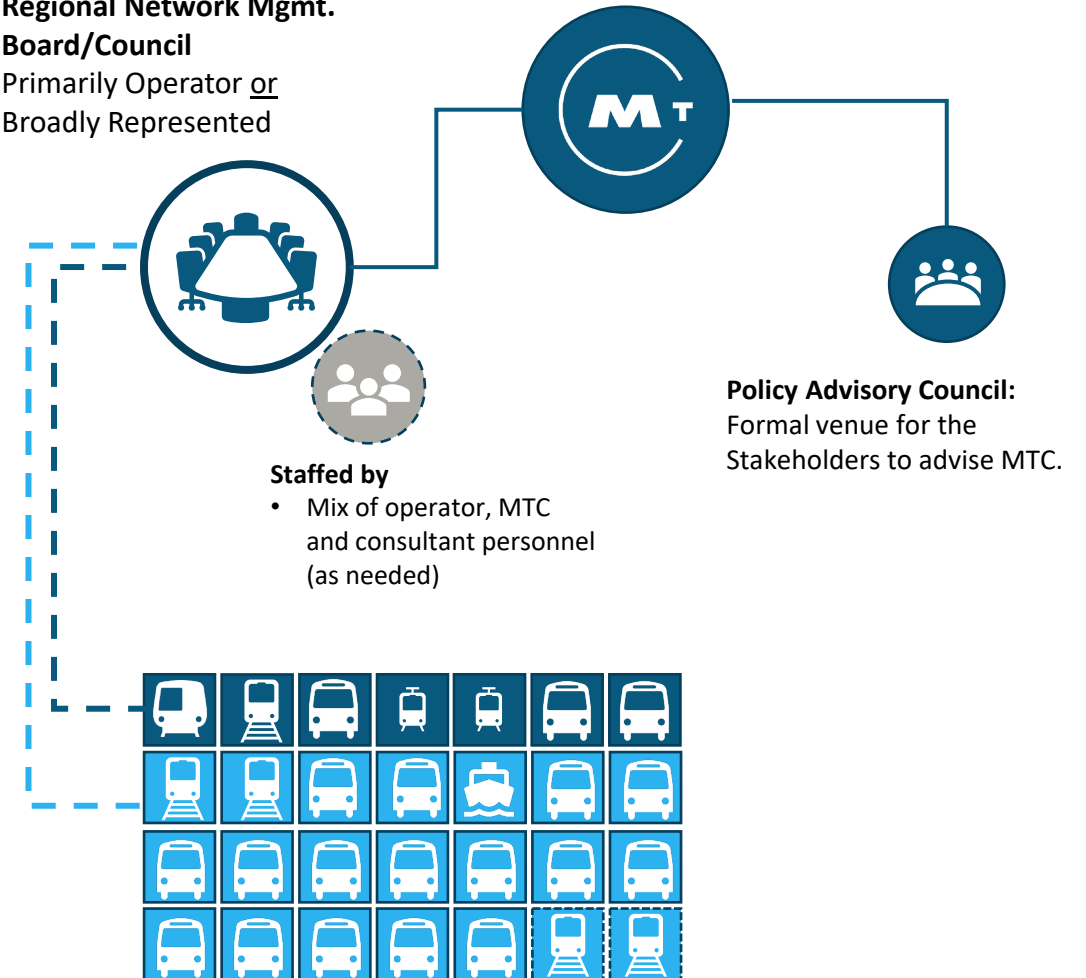
## Representation

- Final composition of Board/Council is subject to design refinements – could have operator focus or broader representation




### Regional Network Mgmt.







#### Board/Council

Primarily Operator or  
Broadly Represented



# Network Management | highlights

Criteria	Evaluation	Finding
System outcomes		Can advance many of the initiatives aimed at increasing ridership and improving customer experience. However, delivering on the full suite of system outcomes will be more challenging.
Institutional Authority		Representation of operators brings ready-made operation and delivery expertise into NM, and builds policy linkages between organizations. A decision-making (or recommending) body composed of individuals who serve multiple governing interests can blur/dilute accountability, further assessment would be needed.
Financial (cost effective)		Leveraging and formalizing the collaboration on a defined list of activities allows a right sizing of effort, resulting in a more cost-effective delivery of outcomes and organizational administration. Likely to be some duplication and redundancies.

Other Criteria	
Governance	
Nimbleness	
Durability	
Readiness	
Capability	
Adaptability	

*Note: All options are likely supportable by some stakeholders across the region in different ways*

# Network Management

## Outstanding questions and unresolved issues

- How would disagreement on decisions between the RNM and individual transit boards be resolved?
- When and how would new funding be secured?
- How would the Network Management body evolve to tackle larger, more challenging initiatives?

# Network Manager | Option 3

## Design Objective

- A new agency, separate from the MTC with independent powers and authorities to lead Regional Network Manager activities in the Bay Area under a reformed governance framework

## Mandate, authority and decision Accountability

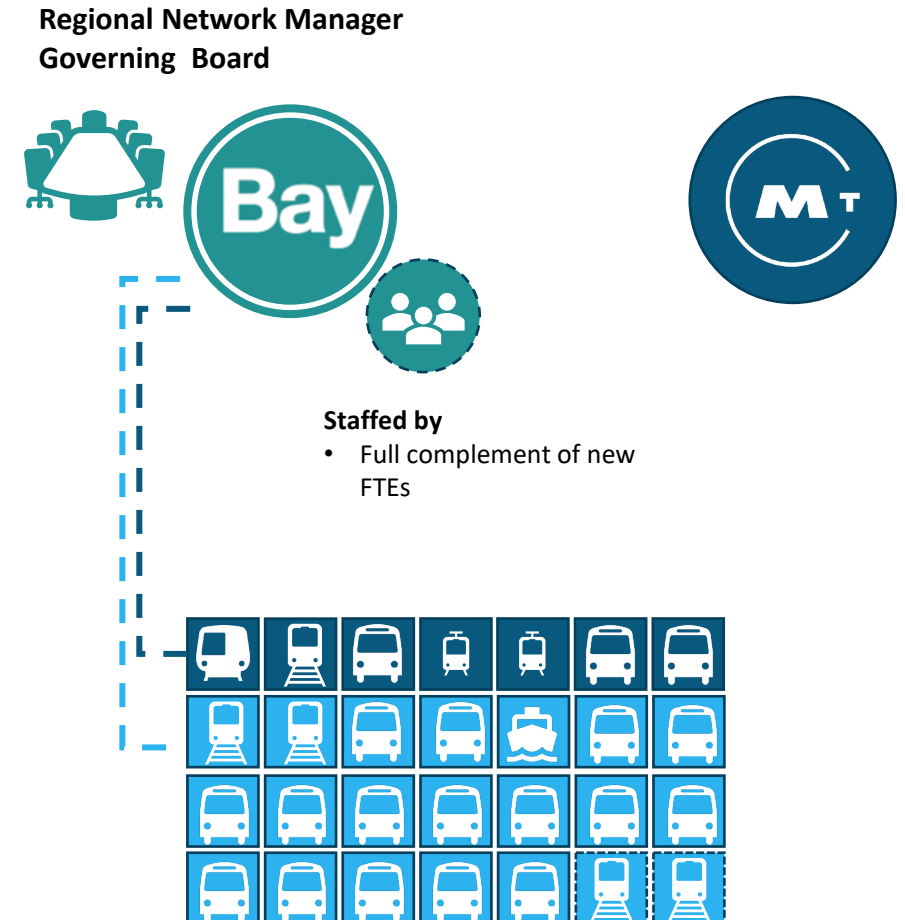
- Structure would be set-up as a policy body with accountability to the public – that is, governing policy body is primarily elected official or directly appointed as delegates
  - Requires reorganization of MTC authorities and mandate
- Mandate delivered via state legislation
- Would have comprehensive decision authority for RNM activities beyond the near-term including bus/rail reforms, project prioritization and oversight

## Funding




- Require new dedicated regional source of funding, would have the authority to coordinate with stakeholders and seek voter approval of new RNM funds. Can direct or influence a reprioritization of some existing funding.







## Representation

- As a policy body, has political representation to remain publicly accountable. Board/oversight committee could encompass subject matter appointees or representatives from transit operators.



# Network Manager | Option 3 Highlights

Criteria	Evaluation	Finding
System outcomes		<b>A built-for purpose entity, with clear policy direction</b> should be able to perform effectively to deliver the full suite of RNM roles and responsibilities.
Institutional Authority		<b>Allows for the ability to independently deliver on its assigned RNM mandate and duties.</b> Relationships with other policy entities across the Bay Area may take time to develop but are possible to achieve.
Financial (cost effective)		This structure <b>would likely be able to deliver more cost-effective RMN outcomes over time.</b> Further assessment needed to determine whether savings would be captured by Manager or absorbed within agencies.

Other Criteria	
Governance	
Nimbleness	
Durability	
Readiness	
Capability	
Adaptability	

*Note: All options are likely supportable by some stakeholders across the region in different ways*

# Network Manager | Option 3

## Outstanding questions and unresolved issues

- Can a new entity bring about the desired efficiencies for the Bay Area?
- How would a new entity interface with the Bay Area's other transportation, planning and policy authorities?
- How and when would a structure like this emerge?

# Network Manager | Design Option 4

## Design Objective

- Centralize accountability, authority, and organizational resources for RNM within the MTC and create a new legislated authority to undertake expanded RNM responsibilities.

## Mandate, authority and decision Accountability

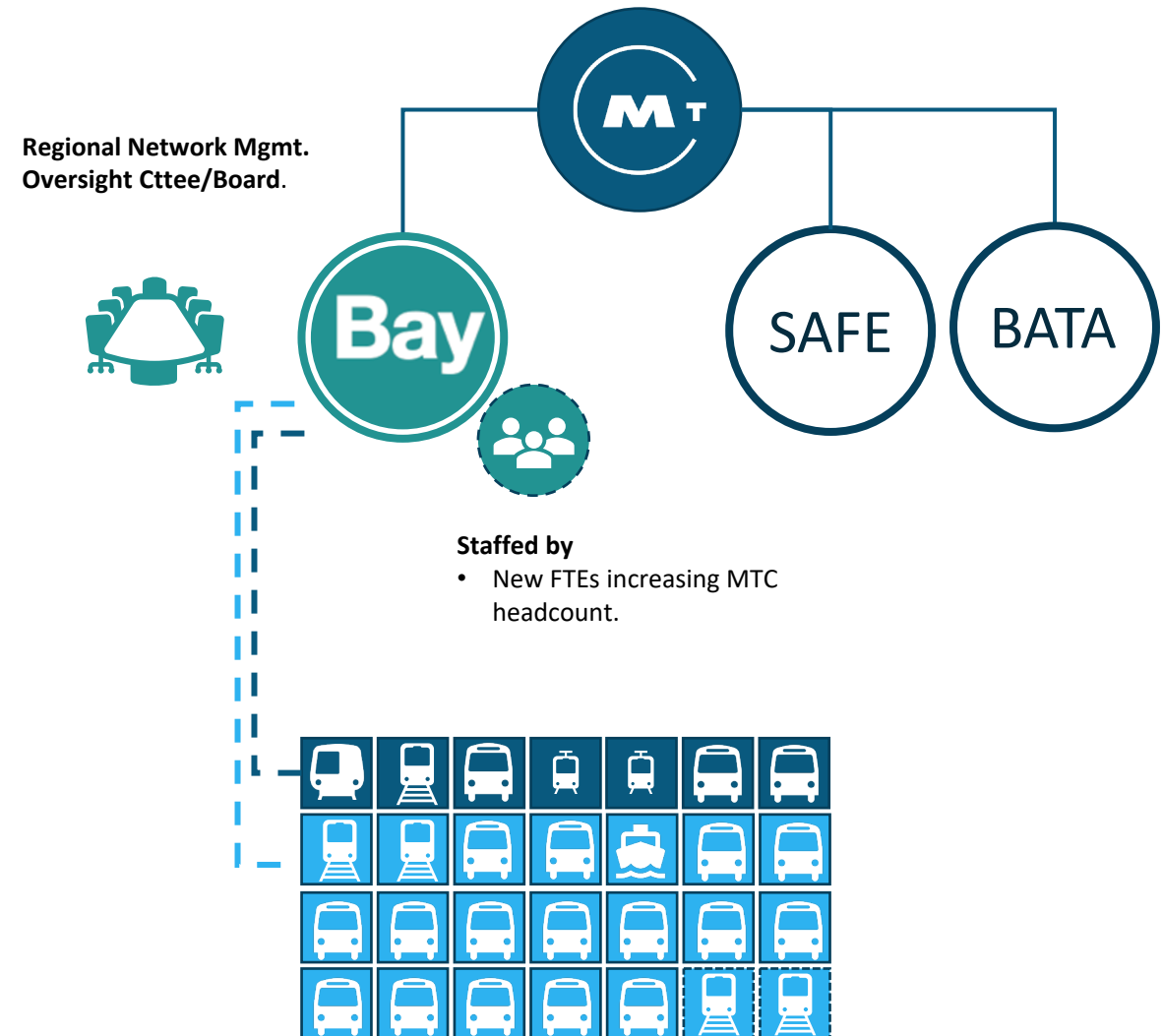
- Mandate delivered by legislation, with new tools and powers
- MTC would both oversee and administer the new Network Manager
- Decisions made under the RNM would be binding for the operators to carry out and implement

## Funding




- Would increase MTC headcount to staff Network Manager
- One of the anticipated legislative authorities would be to reprioritize and redirect funding for RNM activities, option is also positioned to generate support for new regional funding.







## Representation

- Under this structure it would be possible to have a board or committee composed of transit representatives, and MTC appointees (or a mix of both) to oversee RNM programs.
- MTC would maintain public policy accountability
- With a significant new mandate, organization's representation or other policy oversight options for RNM function itself could be considered



# Network Manager | Option 4 Highlights

Criteria	Finding
System outcomes	 <b>As a new built-for purpose unit within MTC, can perform effectively against outcomes provided capacity and expertise is acquired.</b> With a dual function as the MPO and NM, should be able to integrate decisions on funding and prioritization; generate support for new funding. With many functions, MTC integration benefits should be weighed against clarity of purpose.
Institutional Authority	 <b>The structure should allow for quick decision making.</b> While the structure is not entirely Independent of MTC, it allows for a clear body with financial, policy, administrative and technical capacity.
Financial (cost effective)	 <b>There may be several advantages of scale to house the RNM within an existing entity.</b> Some decision authority delegated from MTC but resources needed to set up and administer. It is expected to be able to cost-effectively deliver over time.

Other Criteria	
Governance	
Nimbleness	
Durability	
Readiness	
Capability	
Adaptability	













*Note: All options are likely supportable by some stakeholders across the region in different ways*

# Network Manager | Design Option 4



















## Outstanding questions and unresolved issues

- Will consolidating so many transport mandates within MTC pose challenges for maintaining clarity of mission and purpose?
- What would be the impacts to MTC?

# Assessment summary 1/2

Option:	1/2	3	4	
<b>System outcomes</b>				<p>Delivering on the full suite of regional system outcomes will be more challenging under the Network Management option.</p> <p>Since it is implemented within the existing legislated framework it has fewer powers to implement the full range of RNM responsibilities and generate new funding.</p>
<b>Institutional Authority</b>				<p>The Network Manager options would be purpose built with the financial, policy, technical skills to address the full range of regional roles and responsibilities.</p>
<b>Financial (cost effective)</b>				<p>Option 4 is potentially more cost effective because it will be able to make use of existing MTC resources for certain functions, and over the long term harmonize expenditures that might today be duplicative.</p>
<b>Politically supportable</b>				<p>All options are likely supportable by some stakeholders across the region in different ways.</p>

# Assessment summary 2/2

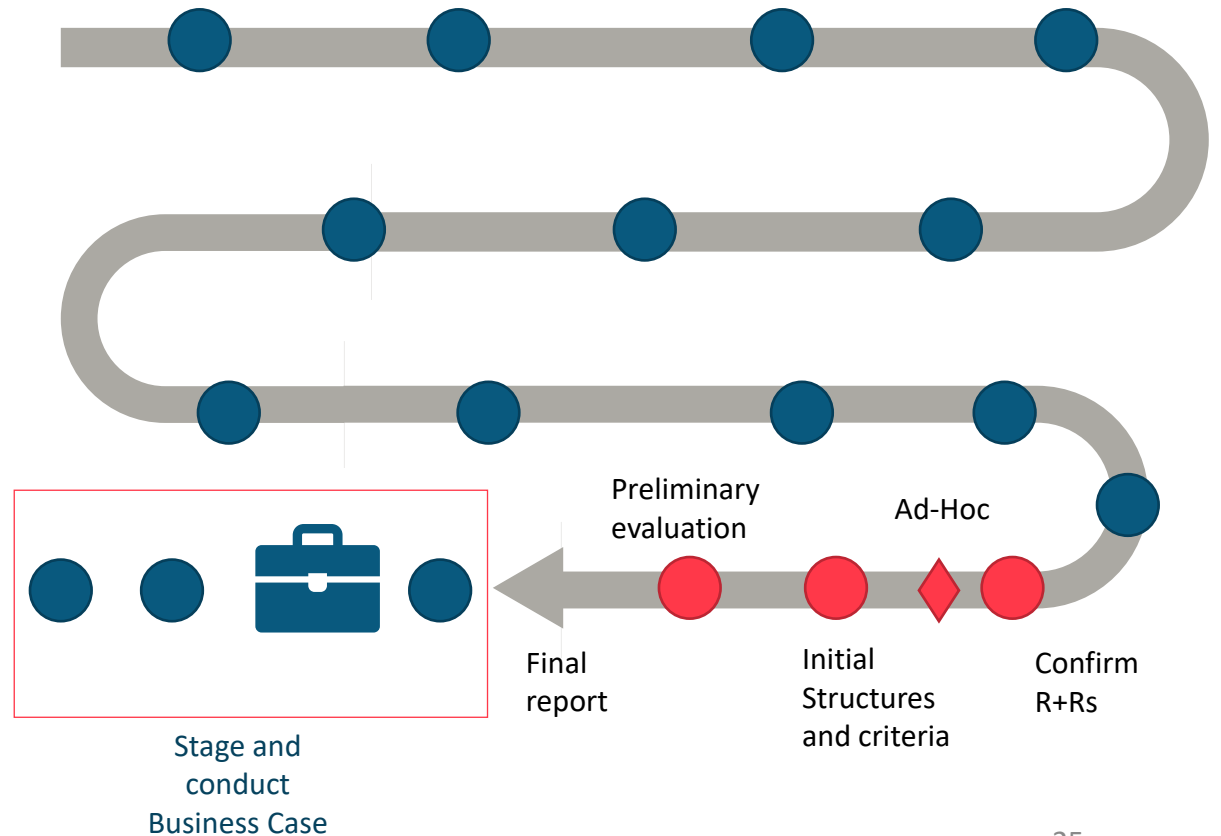
Option:	1/2	3	4	
<b>Governance</b>				The potential for conflicting perspectives and priorities may emerge from the dual accountabilities (local and regional) under Management model.
<b>Nimbleness</b>				Each option provides some qualities that would enable nimbleness, though each is different.
<b>Durability</b>				The purpose built and legislated Manager options would have greater durability to withstand instability that may arise from Management models which rely more heavily on consensus-based decision-making.
<b>Readiness</b>				<p>Drawing on a range of existing capabilities, the Management model could be advanced more quickly in the short term.</p> <p>Option 3 would be the least ready, needing all functions from new; less so if realigned from existing or through consolidations.</p>
<b>Capability</b>				Both have strengths and weaknesses in the near term. In the long-term Manager options should have the technical capabilities to implement the full range of regional roles and responsibilities.
<b>Adaptability</b>				Management may be able to pivot quickly as direction is not externally mandated (via law). All options can incorporate multimodality; MTC perhaps greatest/easiest opportunity to adapt given its mandate.

# Next steps

- Incorporate comments from BRTF on Consultant approach and methodology for option development. **(by July 28<sup>th</sup>)**
- Collate findings into a Final Summary Report, including a set of recommendations for the business case process. **(August 9<sup>th</sup>)**

## Next Phase - Stage the Business Case:

- **Define values** - which elements are most important for NM to drive progress on, long term
- **Refine structure options** and explore permutations – best foot forward
- **Deeper assessment** quantification relative to a defined base case (status quo).
- Change management and **constituency building**



# Takeaways

- There are a range of viable options, path depends on what is most important
- Long term needs and outcomes drive design
  - each design can accommodate 'stepping stone' activities to make immediate progress
- Biggest design choice – how much NM to *reach* for
  - business case should stress test practical limits/capability of each
- Accountability and voice matters
  - Regional and local
  - Policy and management levels
  - Representation should evolve with entity's roles
- The status quo requires change and change is hard
- Leadership needed to drive change

# For on-going consideration:

- What should be the extent of the Regional Network Management scope?
- Where should regional public policy accountability rest?
- What should be studied in-depth in the business case? What are the remaining gaps?

**Thank you!**

# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 21-0988      **Version:** 1      **Name:**

**Type:** Report      **Status:** Informational

**File created:** 7/14/2021      **In control:** Blue Ribbon Transit Recovery Task Force

**On agenda:** 7/26/2021      **Final action:**

**Title:** Next Steps

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 5 Memo](#)  
[Item 5 Presentation](#)  
[Comment Letter Advisory Council](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Next Steps

**Presenter:**  
Steve Kinsey, CivicKnit and Alix Bockelman, MTC

**Recommended Action:**  
Information

**Attachments:**

## BLUE RIBBON

**TRANSIT RECOVERY  
TASK FORCE**

TO: Blue Ribbon Transit Recovery Task Force Members

DATE: July 26, 2021

FR: Steve Kinsey, CivicKnit

RE: Next Steps

The Task Force will conclude this month after taking action on a set of specific near-term actions in support of the group's outlined Outcomes. Most importantly however, the momentum created by your efforts will continue through a series of follow-through actions.

Task Force members are invited to submit comments on the Transit Transformation Action Plan (Action Plan) document through August 2<sup>nd</sup>. A final Action Plan will be distributed to Task Force members and posted on MTC's website in late August.

This summer, MTC and their partner transit agencies will complete a Return-to-Transit media toolkit that supports a unified communications campaign to be personalized by individual agencies. In addition, MTC will begin the procurement for a consultant to perform a Network Management Business Case analysis, with selection anticipated by October 2021. Their assignment will utilize the Network Management Alternatives Evaluation developed by the VIA Architecture team as its starting point.

At its September meeting, the Commission will consider taking action on the Blue Ribbon's Action Plan, along with establishing a multi-stakeholder advisory body to contribute to a Business Case analysis of potential Network Management reforms within a 6-9 month period.

In October, the Commission will hold a workshop where Action Plan staffing, funding, and assignments to the appropriate MTC Committees will be discussed, followed by specific appropriations in the months that follow.

In November, the Network Management Business Case advisory group will have its initial meeting with the selected consultant team.

In the first quarter of 2022, the MTC Commission is scheduled to review the Action Plan progress and may seek legislation or make funding and timing adjustments based on assessment of the efforts.

BLUE RIBBON



TRANSIT RECOVERY  
TASK FORCE

A long-exposure photograph of a transit station at night. In the foreground, a white SolTrans bus with the number 3919 is blurred, moving from left to right. Its destination sign reads 'TO WALNUT CREEK'. The bus has the 'SolTrans' logo on its side. In the background, another bus is visible under a large, modern, curved transit shelter with a white metal frame and a translucent roof. The scene is illuminated by station lights, creating light trails and a vibrant blue and orange color palette.

**POST BLUE RIBBON:  
KEEPING THE MOMENTUM**

Steve Kinsey, CivicKnit  
Alix Bockelman, MTC

July 26, 2021

# AUGUST 2021

- Task Force members invited to **comment on draft Transit Transformation Action Plan** document through **Monday, August 2nd**
- MTC staff produces Final Action Plan document



# SEPTEMBER 2021

- **Commission to consider acting on the Action Plan**
- Commission establishes Network Management Business Case advisory group



# OCTOBER 2021

- **Commission workshop**
  - Provide direction on funding and staff resources needed to implement Action Plan
  - Determine which MTC Committee(s) would oversee Actions
- **Consultant contract for Network Management Business Case analysis**



# BEFORE YEAR'S END

- Begin funding specific Action Plan projects
- First meeting of consultants and Network Management Business Case advisory group
- Initial rail grant program assessment presented to Commission



# TRANSITION FROM TASK FORCE TO NETWORK MANAGEMENT BUSINESS CASE ADVISORY GROUP

- **The make-up of the Blue Ribbon Task Force included a roughly equal representation of transit operators, and stakeholders for related broad interests.**
- **The purpose of the advisory group is focused on the network management business case.** Maintaining equivalence of perspectives between the transit operators and other stakeholders advancing related regional transit interests is important, as is technical input from implementing agencies.

# NETWORK MANAGEMENT BUSINESS CASE

## ADVISORY GROUP: PROPOSED COMPOSITION



**7 Transit Operators  
Members**, nominated by  
transit operators\* (GMs)

**7 Stakeholder  
Members\***  
(Non-Transit Operator)

> Including MTC,  
representatives for  
equity/social justice,  
transit riders, business,  
and labor

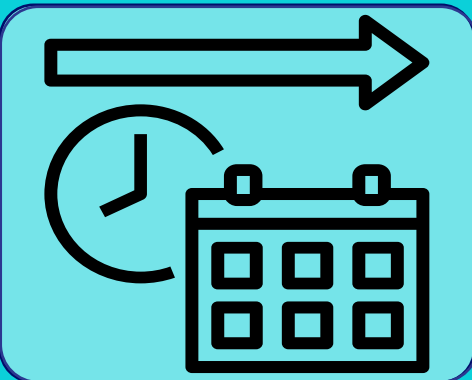
\* Appointed by MTC

# NETWORK MANAGEMENT BUSINESS CASE ADVISORY GROUP: PURPOSE AND TERM



## PURPOSE

- **Network Management Business Case** — Review analysis and recommendations; provide periodic updates to Commission



## TERM

- To be formed by MTC in September 2021
- Limited (~12 months)

# QUESTIONS?





[www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force](http://www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force)



METROPOLITAN  
TRANSPORTATION  
COMMISSION

Agenda Item #  
Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

## *Memorandum*

TO: MTC Commission  
FR: MTC Policy Advisory Council  
RE: Blue Ribbon Transit Recovery Task Force

DATE: July 15, 2021  
W.I. 1114

At its July 14, 2021 meeting, the Policy Advisory Council received an update from staff on the work of the Blue Ribbon Transit Recovery Task Force. Staff recapped the two major items from the June 28 Blue Ribbon meeting, the network management evaluation and the transformation action plan, and noted that post-Blue Ribbon actions and decision points will be discussed at the Task Force's July 26, 2021 meeting.

After discussion, the Council unanimously voted to thank the Blue Ribbon Transit Recovery Task Force for their work and to express their appreciation for including the Council in the process. The Council also requested that the post-Blue Ribbon Transit Recovery Task Force committee continue to have a seat for the Policy Advisory Council to provide the Council's input on the business plan development.

# Metropolitan Transportation Commission

## Legislation Details (With Text)

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**File #:** 21-0973      **Version:** 1      **Name:**

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

**File created:** 7/8/2021      **In control:** Blue Ribbon Transit Recovery Task Force

**On agenda:** 7/26/2021      **Final action:**

**Title:** Revised Actions

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 6a Memo](#)  
[Item 6a Presentation](#)  
[Item 6a Action Matrix](#)  
[Item 6a Action Comment Log](#)  
[Comment Letter Bay Area Elected Officials & Voices for Public Transportation](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Revised Actions

**Presenter:**  
Steve Kinsey, CivicKnit

**Recommended Action:**  
Approval

**Attachments:**

## BLUE RIBBON

**TRANSIT RECOVERY  
TASK FORCE**

TO: Blue Ribbon Transit Recovery Task Force Members

DATE: July 26, 2021

FR: Steve Kinsey, CivicKnit

RE: Actions for Transit Transformation Action Plan

Upon its creation, the Blue Ribbon Task Force was assigned responsibility to develop a Transit Transformation Action Plan (Action Plan). Over the course of fourteen months, the body unanimously set Goals and Objectives, defined Equity Principles, clarified the key Problems facing Bay Area transit, narrowed a list of Network Management roles and responsibilities to be evaluated for potential near-term reforms and commented on an independent Network Management Alternatives Evaluation done by a team led by VIA Architecture.

At the June BRTF meeting, a list of 25 draft Actions, assembled under five identified Action Plan Outcomes, was presented and discussed. At its July 26th meeting, the Task Force will be considering a set of 27 Actions that reflect revisions and clarifications presented at the last meeting, other correspondence received by July 8<sup>nd</sup> and any other suggestions that arise prior to a vote.

The identified actions are specific, time-sensitive efforts intended to provide near-term customer improvements and build momentum for a longer-term expansion of regional connectivity and convenience. Many of the listed actions will require shared responsibility among transit agencies and MTC, in conjunction with an equitable public engagement process to ensure all voices are able to contribute to decisions. Timely implementation of these actions is ambitious. Success will be dependent on sufficient funding (combination of existing and new funding sources) and staffing resources, and on continued collaboration for delivery. Target completion dates are preliminary and subject to continued evaluation and refinement.

These actions accompany many other network management duties that are currently being performed by the transit agencies. In addition, consistent with the Action Plan, it is expected that MTC will retain a consultant to perform a Network Management Business Case analysis over the next nine months, with a multi-stakeholder advisory group to serve as a sounding board. The advisory group may also provide periodic updates directly to Commissioners and have the opportunity to comment on the draft Business Case when it is presented to the Commission.

At this meeting, the Task Force will only be voting on the specific actions. Task Force members and the public may comment on the corresponding Draft Action Plan text at the meeting or subsequently through August 2<sup>nd</sup> by sending comments to [steve@civicknit.com](mailto:steve@civicknit.com). A final version of the document will be sent to all Task Force members and posted on the MTC website upon its completion, expected in late August.



BLUE RIBBON



**TRANSIT RECOVERY  
TASK FORCE**

**Agenda Item 6a Presentation**

# **TRANSIT TRANSFORMATION ACTION PLAN: REVISED ACTIONS**

**Steve Kinsey, CivicKnit**

July 26, 2021

# TRANSIT TRANSFORMATION ACTION PLAN: ADOPT ACTIONS

## AGENDA

- Review comments received
- Review proposed amendments to Actions

*Task Force members are invited to comment on the draft Action Plan document through Aug 2, 2021.*

An aerial, blue-tinted photograph of a transit station. A modern tram is stopped at a platform in the foreground. In the background, there's a small station building, a car, and a street with a stop sign.

**TODAY'S GOAL**  
**> Adopt Actions**

# ACTION PLAN KEY ELEMENTS

- Expanded collaboration between transit operators and with partners is essential
- Actions are keyed to Outcomes
- Network Management reforms subject to Business Case analysis to assess value
- Focused on near-term actions (approx. 1-3 years) leading toward Transit Transformation
- Requires alignment on existing regional funding and new funding
- The Action Plan is ambitious, and the target completion dates are preliminary and subject to continued evaluation and refinement



# PROPOSED AMENDMENTS TO ACTIONS

## SUMMARY OF MODIFICATIONS

- Updated and expanded description of the Bus Transit Priority Actions
- Refined Connected Network Planning Items and revisited target completion date
- Updated Data Collection and Coordination
- Clarified and added two actions under Accessibility
- Revisited the timing and added more definition to the Funding Actions
- Technical clarification

## CONSIDERATIONS FOR OTHER COMMENTS

- May require planning and resources beyond near-term time frame
- Suggestions best addressed when implementation of Actions begin
- Define Actions broadly enough to allow each Action's study or process to determine scope and detail needed to achieve outcome

# TRANSFORMATION ACTION PLAN: **ACCELERATED ACTIONS** (FINAL DRAFT)

## I. FARES AND PAYMENT



### Fare Integration Policy

- Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects, **by December 2021.**
- Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations **by December 2021.**
- Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations **by mid-2022.**

### Active Efforts —

Continue to invest in and improve existing programs (Clipper, Clipper START, inter-operator transfer policies, mobile payment apps)



# TRANSFORMATION ACTION PLAN: **ACCELERATED ACTIONS** (FINAL DRAFT)

## II. CUSTOMER INFORMATION



### Mapping and Wayfinding

- Fund and finalize regional mapping and wayfinding standards for application across all operator service areas **by mid-2023**.
- Fund and complete 1-3 consistently-branded North and East Bay subregional mapping and wayfinding pilot projects and adopt timeline **by late 2024** for subsequent regionwide deployment across all service areas.
- Fund and develop a regional mapping data services digital platform, to enable the standardization and routine updating of digital and paper maps across all transit services **by late 2023**.

### Active Efforts –

Continue partnering with operators on: Return-to-Transit and future regional marketing campaigns; 511 infrastructure; Business Groups' employer surveys; BART's station access signage and wayfinding standards update/implementation



# TRANSFORMATION ACTION PLAN: **ACCELERATED ACTIONS** (FINAL DRAFT)

## III. TRANSIT NETWORK



### **Bus Transit Priority** (speed & reliability)

- Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions **by December 2021**.
- Sponsor legislation to remove barriers to transit priority implementation **by early 2022**.
- Fund the design and delivery of prioritized near-term transit corridor projects **by mid-2022**.
- Select near-term HOV lane operating policies to advance to the State **by mid-2022**.
- Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way **by late 2022**.
- Fund, develop and adopt a Transit Priority Policy and Corridor Assessment for improving bus speed and reliability on high-transit corridors and arterials, including identification of current bus speeds to establish a baseline, **by late 2023**.

### **Active Efforts –**

Regional Transit Priority and Arterial Investment programs; SFMTA emergency transit lanes; Bay Bridge and Dumbarton Forward projects



# TRANSFORMATION ACTION PLAN: ACTIONS (FINAL DRAFT)

## III. TRANSIT NETWORK

### Bus/Rail Network Management Reform

- Fund and complete a Business Case analysis of potential network management reforms, including resource requirements and implementation steps, **by mid-2022**.
- Establish and support an MTC advisory group to guide the Network Management Business Case analysis **by October 2021**.
- Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiencies initiatives **by December 2021**.
- Deliver Phase 1 Rail Partnership and Governance Assessment grant **by late 2021** and Final Assessment **by mid-2023**.
- Adopt Transit Equity Principles and a process for applying them **by mid-2022**.

**Active Efforts —**  
Blue Ribbon Task Force and related collaborations; Transit Sustainability Project (TSP)



# TRANSFORMATION ACTION PLAN: ACTIONS (FINAL DRAFT)

## III. TRANSIT NETWORK

### Connected Network Planning

- Fund, develop and adopt a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks (such as Rapid Transit), funding requirements and next steps **by late 2023**.
- Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local community access plans and policies **by late 2023**.

### Active Efforts —

Synchronize schedule changes across operators; Operator's schedule and hub transfer coordination improvements; Operator's transit hub coordination framework; Transit connectivity tool (software); Regional Annual Transit Passenger Survey



### Data Collection and Coordination

- Establish protocols and implement uniform Realtime and transit pathway data collection as a foundation for providing consistent and accurate customer information **by mid-2023**.

# TRANSFORMATION ACTION PLAN: ACTIONS (FINAL DRAFT)

## IV. ACCESSIBILITY

- Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county, consistent with the 2018 Coordinated Plan, **by mid-2022.**
- Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips **by late 2022.**
- Identify next steps for the full integration of ADA-paratransit services on Clipper Next Generation **by late 2022.**
- Identify key paratransit challenges and recommend reforms through the Coordinated Plan update **by early 2023.**
- Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC) **by late 2022.**

**Active Efforts —**  
Regional Transit Connection Card (RTC discount); Integration of paratransit on Clipper Next Generation



# TRANSFORMATION ACTION PLAN: ACTIONS (FINAL DRAFT)

## V. FUNDING

- Identify cost-saving efficiencies and Network Management funding needs as part of Business Case analysis **by early 2022**.
- Convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit **by late 2023**.

**Active Efforts —**  
Continue state and federal advocacy efforts for increased transit funding.



# TRANSIT TRANSFORMATION ACTION PLAN: QUESTIONS & COMMENTS

**Effectively, change is almost  
impossible without collaboration,  
cooperation and consensus.**

**-- Simon Mainwaring**



[www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force](http://www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force)

Blue Ribbon Transit Recovery Task Force - Action Matrix

UPDATED and REVISED- July 21, 2021

Proposed substantive edits are represented in red based on Actions that were presented in June to the Task Force  
The completion of these Actions by the listed target completion dates is subject to change and dependent upon sufficient funding, staffing resources, and continued collaboration on delivery.

Key to Estimated Range of Funding Needs:	
\$	= \$0 - 10 million
\$	= \$10 - 50 million
\$	= \$51 - 100 million
\$	= \$101 - 200 million
\$	= \$200+ million
TBD	= Estimate not currently available

\*Target Completion dates are preliminary and subject to continued evaluation and refinement.

Network Management Outcomes	Associated Roles & Responsibilities	Active Network Management Efforts	Recommended Near-Term Actions		Target Completion Date*	Key Action Partners	Est. Funding Needs	
<u>I. Fares and Payment</u>  Simpler, consistent and equitable fare and payment options attract more riders	- Fare Integration Policy	- Clipper - Clipper START - Inter-operator Transfer Policies - Mobile Payment Apps	Accelerated	1) Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects.	December 2021	MTC, Transit Agencies	TBD	
				2) Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations.	December 2021	MTC, Transit Agencies	\$	
				3) Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations.	Mid-2022	MTC, State Legislators	\$	
<u>II. Customer Information</u>  Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders	- Branding, Mapping and Wayfinding - Technology and Mobile Standards - Marketing/ Public Information	- Return-to-transit Campaign and future regional marketing campaigns - 511 Infrastructure - Business Groups' Employer Surveys - BART's Station Access Signage & Wayfinding Standards Update/ Implementation		4) Fund and finalize regional mapping and wayfinding standards for application across all operator service areas.	Mid-2023	MTC, Transit Agencies	\$	
				5) Fund and complete 1-3 consistently-branded North and East Bay subregional mapping and wayfinding pilot projects and adopt timeline for subsequent regionwide deployment across all service areas.	December 2024	MTC, Sonoma, Solano, Eastern Alameda and Contra Costa Counties	\$\$	
				6) Fund and develop a regional mapping data services digital platform, to enable the standardization and routine updating of digital and paper maps across all transit services.	Late 2023 -2024	MTC, Transit Agencies	\$	
<u>III. Transit Network</u>  Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	- Bus/Rail Network Management Reform - Connected Network Planning - Capital Project Prioritization - Bus Transit Priority - Station Hub Design Review - Data Collection and Coordination	- Regional Transit Priority and Arterial Investment Programs  - SFMTA Emergency Transit Lanes  - Bay Bridge and Dumbarton Forward Projects		Bus Transit Priority (Speed and Reliability)				
				7) Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions.	December 2021	CalSTA, MTC	\$	
				8) Sponsor legislation to remove barriers to transit priority implementation.	Early 2022	MTC, Transit Agencies	\$	
				9) Fund the design and delivery of prioritized near-term Bay Area Forward transit corridor projects.	Mid-2022	MTC, Transit Agencies, CTAs	\$\$\$\$	
			10) Select near-term HOV lane operating policies to advance to the State.	Mid-2022	MTC, Transit Agencies, CTAs	\$\$		
			11) Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way.	Late 2022	MTC, Caltrans, CTAs, Transit Agencies, Cities	\$		
			12) Fund, develop and adopt a Transit Priority Policy and Corridor Assessment for improving bus speed and reliability on Bay Area Rapid Transit Network focused on high-transit volume corridors and arterials, including identification of current bus speeds to establish a baseline.	Late 2023	MTC, Caltrans, CTAs, Transit Agencies, Cities	\$		
			Bus/Rail Network Management Reform					
			13) Fund and complete a Business Case analysis of potential network management reforms, including resource requirements and implementation steps.	Early Mid-2022	MTC	\$		
			14) Establish and support an MTC advisory group to guide the Network Management Business Case analysis.	October 2021	MTC	\$		
15) Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiency initiatives.	December 2021	MTC, CTAs	\$					
16) Deliver Phase 1 Rail Partnership and Governance Assessment grant by late 2021 and Final Assessment by Mid-2023	Late 2021/ Mid-2023	MTC	\$					
17) Adopt Transit Equity Principles and a process for applying them.	Mid-2022	MTC, Transit Agencies, CTAs	\$					
Connected Network Planning								
18) Fund, develop and adopt a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks (such as Rapid Transit), funding requirements and next steps.	Late 2024 2023	MTC, Transit Agencies	\$					
19) Adopt a standardized transit hub toolkit to optimize station design and connectivity review framework that includes coordination with local community access plans and policies.	Late 2023	MTC, Transit Agencies	\$					
Data Collection and Coordination								
20) Establish common platform and protocols and implement uniform GTFS Realtime and transit pathway data collection as a foundation for providing consistent and accurate customer information. Fund technical support needed to bring all agencies to uniformity.	Mid – 2023	MTC, Transit Agencies	\$					
<u>IV. Accessibility</u>  Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently	- Accessible Services (including Paratransit) - Centralized Program Eligibility Verification	- Regional Transit Connection Card (RTC discount) - Integration of Paratransit on Clipper Next Generation	21) Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county, consistent with the 2018 Coordinated Plan.	Mid-2022	MTC, Transit Agencies, CTAs	\$		
			22) Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips.	Late 2022	MTC, Transit Agencies, East Bay, Sonoma County, SF / Peninsula	\$\$		
			23) Identify the next steps for the full integration of ADA-paratransit services on Clipper Next Generation.	Late 2022	MTC, Transit Agencies, Paratransit Providers	\$		
			24) Identify key paratransit challenges and recommend reforms through the Coordinated Plan update.	Early 2023	MTC, Paratransit Providers	\$		
			25) Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC).	Late 2022	MTC, Bay Area Partnership Accessibility Committee	\$		
<u>V. Funding</u>  The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs	Funding Advocacy	Continue State and Federal Advocacy efforts for Increased Transit Funding	26) Identify cost-saving efficiencies and Network Management funding needs as part of Business Case analysis.	Early 2022	MTC, Transit Agencies	\$		
			27) Support efforts to Convene stakeholders to identify priorities and a funding framework for organize a transportation funding ballot measure that includes new funding for transit.	November-2024 Late 2023	MTC, Transit Agencies, CTAs, Stakeholder, the Public, NGOs	\$		

**Blue Ribbon Transit Recovery Task Force**  
**Transformation Action Plan - Comment Tracking Log on Draft Actions**  
**Revision Date: July 21, 2021**

The following is a compilation of comments received between June 27-July 16, 2021 on the Draft Actions for the Transformation Action Plan.

Commenter	Comment (some have been paraphrased)	Transmittal	Blue Ribbon Staff Response
Ian Griffiths	<p>SPUR submitted a letter in support of a Bay Area Connected Network Plan – happy to see that in the plan. But completing this by late 2024 should be moved ahead to perhaps 2023 – and particularly to support passing a funding measure in 2024.</p> <p>Please modify the 3rd bullet to complete the Bay Area Connected Network Plan by late 2023 at the latest so it can be part of the campaign for a regional funding measure. Also, strongly consider having the governance of the ‘Connected Network Plan’ be the same as the Network Management business case and the Rail Partnership and Governance assessment, for simplicity, efficiency, and synergies. All three initiatives are highly related and fewer governing bodies will be easier to manage and align.</p>	BRTRTF Meeting + Letter	Modified Action Item #18
Ian Griffiths	<p>I would love to see an interim step of setting up a publicly held stakeholder process to support a Nov 2024 ballot measure. Suggest the Commission to carry the organization and administration needed to develop a consensus expenditure plan (like MTC/ABAG did for CASA).</p> <p>We acknowledge that MTC may not be well-positioned to lead a regional funding measure campaign - that may well be the role of civic groups. However, MTC is uniquely positioned to initiate a publicly-led regional multi-stakeholder process that brings together various civic groups that can lead to a clear set of goals for a regional funding measure and a vetted set of potential revenue sources. This is badly needed, and many civic groups would like MTC to step up and play this role to ensure that a diversity of civic groups can ultimately get behind a campaign in 2024. Voices for Public Transportation submitted a letter at the May 2021 BRTF meeting asking for this. Therefore, please consider adding the following to the action plan:</p> <ul style="list-style-type: none"> <li>• “Initiate and fund a public multi-stakeholder process to bring together civic and community groups from across the Bay Area to develop a common vision for a regional ballot measure by early 2022, to be completed by late 2022. Study and identify goals, expenditure priorities, and potential revenue sources that could be part of a 2024 or future year regional funding measure.”</li> </ul>	BRTRTF Meeting + Letter	Modified Action Item #27
Ian Griffiths	<p>Finally, on paratransit and accessibility, happy to see this and I don’t think there has been enough discussion in this area.</p> <p>As I indicated, I think these recommendations do not go far enough. While I do not speak for disability advocates, the following are elements that several disability advocates have communicated to me as worth consideration:</p> <ul style="list-style-type: none"> <li>o A deeper effort restructure of paratransit regionally so that it meets the needs of riders, including being set up to offer same day, on-demand service.</li> <li>o A reform process that is based around paratransit riders, service providers, and non-profit groups, where they have a central seat at the table.</li> <li>o Creating accountability at a regional scale for paratransit, including dedicated staff at the regional level to oversee a seamless and rider-focused paratransit system.</li> <li>o Investigation into creating a single paratransit operator for the bay area.</li> <li>o New funding for accessible transit that can be raised in a regional measure. I believe it’s appropriate for the Action Plan to identify a deadline for the initiation of a broad stakeholder process to reimagine and reform paratransit, starting with a clear problem statement. This could be through the Coordinated Public Transit Human Services Plan - but what’s important is that it allow for the fundamental rethinking of paratransit service delivery to be more rider focused.</li> </ul>	BRTRTF Meeting + Letter	Added Action Item #24
Commissioner Nick Josefowitz	<p>Emphasis on transit priority is important, there are a lot of steps we can take (operating hours on 101) and other ways we can speed travel time with relatively simply interventions. I urge us to add things like Queue-Jump-Lanes. I also want to echo what Ian said about a connected network vision. We need to do this Connected Network Plan by 2023 to take to legislature before 2024. I know that is a quick turnaround, but if we want to raise money in 2024 we need to work backwards from that.</p>	BRTRTF Meeting	Modified Action Item #12 and #18
Jason Baker	<p>It is important if we are leading up to a measure in 2024, for us to talk about this as one thing – not just wayfinding and bus transit priority – but to talk to the public about how we are making transit better across these various areas. They need to see them as an overall effort and not as isolated items.</p>	BRTRTF Meeting	Modified Action Item #27

**Blue Ribbon Transit Recovery Task Force**  
**Transformation Action Plan - Comment Tracking Log on Draft Actions**  
**Revision Date: July 21, 2021**

The following is a compilation of comments received between June 27-July 16, 2021 on the Draft Actions for the Transformation Action Plan.

Commenter	Comment (some have been paraphrased)	Transmittal	Blue Ribbon Staff Response
Randi Kinman	Concur with Ian's comments about paratransit and raising up our transit-dependent residents. We could put together another subcommittee or working group of the Policy Advisory Committee.	BRTRTF Meeting	Added Action Item #24
Public Commenters	There are benefits to having a Connected Network Plan before 2024. Move up to 2023	BRTRTF Meeting	Modified Action Item #18
Spur	SPUR encourages the Task Force to complete a Connected Network Plan in 2023 prior to transportation funding ballot measure in 2024. A critical step in network management is to create a long-term, durable vision for transit service throughout the region, through a "focused multiagency effort on regional and subregional service planning to deliver an effective transit system that can attract more riders and be more reliable, connected and customer-oriented". <sup>2</sup> The connected network plan can generate public confidence in the outcomes of future funding measures, which is a key aspect of organizational effectiveness (discussed in Item 4). SPUR believes that the Connected Network Plan should be the plan for a core regional transit network that is designed to act as the Bay Area's stable, high-capacity, high-frequency transportation backbone. As reviewed in past meetings, voters want this too. Voters cited a lack of frequency as a major barrier to public transit use, and over 70% of focus group participants in a 2020 study said that there should be a regional plan to guide transportation investments.	Letter	Modified Action Item #18
Spur	In addition to bus rapid transit, a transit priority policy and corridor assessment should include: (1) The places that would benefit from coordinated efforts to tackle persistent speed and reliability impediments with signal priority, better curb management and parking regulations, queue hopper lanes, and more. Bus rapid transit may be limited to a few locations and difficult to achieve without significant approval streamlining, but there are many more local routes that would benefit from better reliability and speed.	Letter	Modified Action Item #12
Spur	(2) Revising policies and design processes so that that the delivery of bus and HOV projects are coordinated with ongoing investments in highways so that the region cost-effectively is investing in bus and HOV priority at the same time that it is upgrading highways.	Letter	Noted and can be addressed as part of Action Items #7, 12
Spur	(3) A pilot express bus operating model. The Plan Bay Area 2050 draft recommends three initial express bus pilots. For one or more of these proposed regional express bus routes designated, establish operating targets and supporting policies to test and demonstrate a new, coordinated regional express bus operating model. This may strategies to maximize equitable service design, efficient hub station design and operations, station access options and investment needs, station area design, and network integration.	Letter	Modified Action Item #18
Denis Mulligan	I would propose that the first two bullets be as follows: • MTC will publish the average bus speeds along major corridors by October 1st; and	email	Modified Action Item #12
Denis Mulligan	• MTC will detail corridor specific steps to increase bus speeds to reduce travel times (with the understanding that a slow bus trip is not equitable and with the understanding that a slow bus trip is contrary to the region's GHG reduction goals because it does not incent motorists to travel by transit) by December 1st, along with a timeline (by corridor) for implementation of the listed steps.	email	Noted and can be addressed as part of Action Item #12
Warren Cushman	I have checked in with some of my colleagues and we feel that the mtc's paratransit suggestions for the brtf do not go far enough! There is quite a lot of energy right now for comprehensive paratransit reform. Some of the ideas that are coming from my colleagues are delinking paratransit from the ability to drive, and providing same day paratransit service. In addition it seems that most of the heavy lifting for paratransit reform would not begin until the next service plan update in 2022. Also there is a feeling from my colleagues that the mtc surprised the disability community and did not give us sufficient time to dialogue and understand the full implications of their ideas. I hope that we will have a full opportunity to examine the mtc's proposal and ask pointed questions of staff about the vision that they have around how paratransit functions. I looked at the equity and access subcommittee agenda for tomorrow and did not see mtc's proposal for paratransit reform on the agenda. Finally I was informed that we had exactly one day to suggest changes or new ideas to be presented to the brtf for consideration. I do not believe that serves the community well. We need more time to understand the impact of what the mtc is suggesting and present alternatives.	email	Added Action Item #24

**Blue Ribbon Transit Recovery Task Force**  
**Transformation Action Plan - Comment Tracking Log on Draft Actions**  
**Revision Date: July 21, 2021**

The following is a compilation of comments received between June 27-July 16, 2021 on the Draft Actions for the Transformation Action Plan.

Commenter	Comment (some have been paraphrased)	Transmittal	Blue Ribbon Staff Response
Transform	In particular, I support: <ul style="list-style-type: none"> <li>• Removing barriers to transit priority implementation, expediting travel time improvements on arterials and bus rights-of-way, and selecting HOV operating policies that prioritize an express bus network</li> <li>• Acting on the recommendations of the Fare Coordination and Integration Study recommendations, especially selecting and funding pilot projects that increase access to transit for low income riders, and increase ridership on the system overall as transit recovers;</li> <li>• Improvements to paratransit that support the mobility needs of people with disabilities.</li> </ul>	Letter	Noted and Added Action Item #24
Transform	However, a large-scale funding ballot measure will require a robust public process, which I hope MTC will initiate by January 2022, in order to be ready for a 2024 ballot campaign. TransForm supports MTC as a key player in bringing stakeholders together to develop an expenditure plan for a regional transportation funding measure. We must build an outcomes oriented measure that can clearly provide measurable benefits to communities of color, while fairly distributing the financial burden.	Letter	Modified Action Item #27
Transit Agencies	Recommend this modification: 1) Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects <u>and ensure there is a sustainable funding source/ strategy for transit service</u> , by December 2021 .	email	Noted and can be addressed as part of Action Item #1
Transit Agencies	Bus Transit Priority, Add: <ul style="list-style-type: none"> <li>• Bay Bridge Bus lanes AB 455</li> <li>• Est. Common standards for signal priority equipment</li> <li>• Advancing CEQA Streamlining legislation, such as extending and broadening SB 288</li> <li>• Add other bridge corridors to the Forward Projects Action.</li> <li>• What about land use policy?</li> </ul>	email	Modified Action #9. Other comments noted and to be addressed as part of Action Items #8, 12
Transit Agencies	Data: <ul style="list-style-type: none"> <li>• Better define Data Standards, develop common data definitions</li> <li>• Enhance regional data clearinghouse</li> <li>• Further Invest in and improve MTC Transit Connectivity Tool</li> <li>• GTFS Pathways - Data Development</li> </ul>	email	Modified Action Item #20. Some actions are longer term/ require additional discussion.
Transit Agencies	The operators have a detailed list of existing initiatives that should be highlighted and attached to the Action Plan in order to acknowledge that these efforts will continue beyond the BRTF.  Add under Active/ Existing Initiatives: <ul style="list-style-type: none"> <li>• Station Access Signage &amp; Wayfinding Standards Update/Implementation</li> <li>• Hub Transfer Coordination Framework</li> <li>• Regional Transit Service Categories and Definitions</li> <li>• SFMTA Emergency Transit Lanes</li> <li>• Bay Bridge &amp; Dumbarton Bridge Forwards</li> </ul>	email	Specific items added to Matrix
Transit Agencies	The Action Plan will require a new funding source to implement, including for the continuation of existing initiatives even if they are able to be started with ARP Act funding. The Action Plan must be prioritized to take into consideration limited resources to complete. As it currently stands, the transit operators believe it is an ambitious plan unless significant resources are provided.	email	Added context to Action Plan
Transit Agencies	Connected Network Planning – The three identified actions are correct, but timeline may also be ambitious given they will need to be done in parallel and for the entire region. Each of these efforts are akin to major planning efforts conducted by MTC such as TSP or Transbay Core Capacity Study.	email	Noted
Transit Agencies	Accessibility – Cross-jurisdictional coordination should be explored at the sub-regional level, as opposed to regional. <ul style="list-style-type: none"> <li>• We need to monitor the Contra Costa County pilot program closely to determine if it can be replicated in other counties. Need to distinguish between “accessibility” and “paratransit” (federal requirement). Consider FCIS impact on paratransit fares</li> <li>• Service delivery models differ from agency to agency and county to county. Therefore, multiple pilot models should be implemented depending on delivery model, population density, proximity of services and needs of rides, etc.</li> <li>• The transit operators support drawing on the previous coordinated plan on this topic and subsequent recommendations</li> </ul>	email	Noted and can be addressed as part of Action Items. Added Action Item #24.

**Blue Ribbon Transit Recovery Task Force**  
**Transformation Action Plan - Comment Tracking Log on Draft Actions**  
**Revision Date: July 21, 2021**

The following is a compilation of comments received between June 27-July 16, 2021 on the Draft Actions for the Transformation Action Plan.

Commenter	Comment (some have been paraphrased)	Transmittal	Blue Ribbon Staff Response
Transit Agencies	<ul style="list-style-type: none"> <li>• There needs to be an equity focus throughout the Action Plan to ensure its reach is to those disadvantaged communities that need improved public transit the most. There is only brief mention on Slide 7.</li> <li>• There is very little about equity, coverage, and lifeline service. While there are more “efficiencies” in the urban core, the plan does not address the unique issues of the suburban areas – especially the low-income/minority residents who have been pushed to the suburbs. These individuals need access to essential services, employment sites, and education. While many of these trips are local, those who must commute have longer, more expensive, less efficient trips. Taking those trips away would have long-term negative consequences.</li> </ul>	email	Noted and can be addressed as part of Action Item #17 and #18
Transit Agencies	Funding – Cost-savings efficiencies cannot be borne on the backs of the transit operators who are already anticipating funding shortfalls beyond federal stimulus funds. New dollars must be identified for successful implementation.	email	Noted and can be addressed as part of Action Item #26 and #27
Ian Griffiths	<p>While I support these recommendations, this section would be stronger if it included an action to institutionalize wayfinding as part of a broader customer experience center of excellence to be shared among transit agencies. Wayfinding standards constantly evolve and need to be regularly updated.</p> <p>There should be a constant user feedback loop so that rider feedback can be regularly incorporated and replacement wayfinding deployed if it is not working. This requires an institutional function not acknowledged here, but which will be critical to improving the desired outcome of a more legible and user-friendly transit system.</p> <p>As such, I suggest adding the action to the effect of - “Fund and develop a wayfinding and transit customer experience shared center of excellence within MTC to support ongoing user feedback on the performance of the wayfinding system, improvement of standards to reflect customer experiences, and maintenance.” I’d want wayfinding staff to weigh in on the appropriate language here to capture this idea.</p>	email	Noted and can be addressed as part of Action Item #4
Ian Griffiths	Please define what is included in Phase 1 Rail Partnership and Governance assessment. Also, consider the extreme importance of aligning the rail partnership and Governance work with the Network Management Business case, and consider having a common ‘governance’ or advisory structures for both projects, to realize both efficiency and synergies.	email	Noted and can be addressed as part of Action Items #13 and 16.

Date: July 16, 2021

Attn: Jim Spering, Chair, Blue Ribbon Transit Recovery Task Force

**Re: July 26, 2021 Blue Ribbon Task Force Meeting, Transformation Action Plan Recommendation**

From: Bay Area Elected Officials & Voices for Public Transportation

Dear Blue Ribbon Transit Recovery Task Force Chair Spering:

Public transportation is key to an equitable and economically vibrant region, and our regional system's chronic underinvestment has left us with massive mobility injustice. It is the backbone of the multimodal system that so many of our region's residents depend on to get to work, see family and friends, and to get basic needs met. The COVID-19 crisis has only exacerbated the deep inequities present in our transportation system.

Recently approved federal sources of funding, including American Rescue Plan funds, provide only temporary relief to transit agencies. For transit to attract more passengers and adequately meet the needs of low-income communities, communities of color, and transit-dependent people, a significant ongoing investment in operating our transportation system must be made.

**We therefore urge MTC to immediately begin planning a public process to develop a transformative regional funding measure to be ready for a ballot measure as early as 2024.** A successful public process will include the leadership of a multi-stakeholder body as well as extensive community involvement. Examples of past Bay Area public processes that should inform a future funding measure include "Get Us Moving San Mateo County" that led to Measure W and the Mayor's Transportation Task Force 2030 that led to Props J and K in San Francisco. We can learn from the successes and shortcomings of these processes to shape this next endeavour.

Other regions that have succeeded in passing significant funding measures, such as Seattle and Los Angeles in 2016, took years to build the broad support to achieve success at the ballot box. We need to do the same in the Bay Area. MTC has the opportunity to move a transformative investment in our system, but it must act now to initiate an equitable regional process to develop that investment. In order to be ready for a 2024 ballot measure, enabling legislation must be introduced by early 2023, which means a regional process must be initiated by January 2022.

In order for this to be an equitable and successful process, it must be:

1. **Representative and rider-centric:** The multi-stakeholder process must prioritize the voices and priorities of key constituents of the transit system: riders and transit workers. There must be significant representation by historically disadvantaged and disenfranchised communities, including communities of color, low income people, and people with disabilities, as well as equity groups, labor, transit advocates, and

environmental groups. Those groups must represent a majority of seats of any stakeholder body.

2. **Broad-based:** Decisions must be informed by extensive, iterative, and meaningful outreach to communities across the Bay Area, ensuring that outcomes and investments are shaped around these identified needs.
3. **Accessible:** Outreach must meet people where they live, work, and use transportation, and account for a variety of needs including disability, language, schedule, physical access, and childcare. Feedback should be collected in a variety of formats, with options for in-person meetings in all counties, online events, mail-in or online surveys. All outreach should be made inclusive and understandable to all, and value lived experience. Outreach should thoughtfully educate communities in order to empower people to engage. Specific attention should be made to accessing hard to reach communities.
4. **Time sensitive:** A regional process must be initiated with sufficient time to allow for a full public engagement process, including iteration, so that a plan is ready for a 2024 ballot measure.
5. **Well-funded:** Strong outreach and equitable participation requires resources. Ensure funding is available to compensate groups and community members who need it for their participation, and provide the resources needed to reach all parts of the region, especially hard-to-reach communities.
6. **Transparent:** Demonstrate that community feedback and priorities are central to and included in final decisions through ongoing, two-way communication.

We need a long term and transformative investment in our public transportation system in order to meet our equity and climate goals. **We encourage MTC to initiate a publicly led, multi-stakeholder process by January 2022 to develop regional consensus for a public transportation funding measure that embodies these principles.** We urge you to include this recommendation within the Blue Ribbon Task Force's Transformation Action Plan.

Sincerely,

*Bay Area Elected Officials*

**John Gioia**  
Contra Costa County Supervisor

**Gayle McLaughlin**  
Richmond City Council

**Victor Aguilar, Jr.**  
San Leandro Vice Mayor

**Terry Taplin**  
Berkeley City Council



Rev. Dr. Ray Pickett Chair  
Mary Lim-Lampe, J.D. Executive Director  
**Genesis**

Monica Mallon, Transit Lead  
**Silicon Valley Youth Climate Action**

**Rigel Robinson**  
Berkeley City Council

**Kate Harrison**  
Berkeley City Council

**Rashi Kesarwani**  
Berkeley City Council

**Alison Hicks**  
Mountain View City Council

**Lucas Ramirez**  
Mountain View City Council

**Jenny Kassin**  
Fremont City Council

**H. E. Christian (Chris) Peebles**  
At-Large Director, Alameda-Contra Costa  
Transit District

**Jovanka Beckles**  
AC Transit Director, Ward 1

**Elsa Ortiz**  
AC Transit Director, Ward 3

Richard Marcantonio, Managing Attorney  
**Public Advocates Inc.**

Darnell Grisby, Executive Director  
**TransForm**

Michael Gliksohn, Treasurer  
**Richmond Progressive Alliance (RPA)**

Jack Kurzweil  
**Wellstone Democratic Renewal Club**

Ellen Wu, Executive Director  
**Urban Habitat**

Derek Sagehorn, Chair  
**East Bay Transit Riders Union**

Sara Greenwald  
**350 Bay Area**

Tina Martin  
**Mothers Out Front San Francisco**

Zack Deutsch-Gross, Advocacy Director  
**San Francisco Transit Riders**

Adina Levin, Executive Director  
**Friends of Caltrain**

Ian Griffiths, Policy Director  
**Seamless Bay Area**

Kelsey Banes, Executive Director  
**Peninsula for Everyone**

Jean Tepperman, Co-Coordinator  
**Sunflower Alliance**

Patrick Chaffey, Chair - Housing Working  
Group  
**Democratic Socialists of America - Silicon  
Valley Chapter**

Dave Campbell  
**Bike East Bay**

Brian Haagsman  
**WalkSF**

Ogie Strogatz, Member, Leadership Team  
**350 Contra Costa**

David Blake  
**East Bay Gray Panthers**

Michael Gimbel, Chair  
**Friends of DTX**

Armando Barbosa, Organizer  
**ATU Local 265**

Sheri Burns, Executive Director  
**Silicon Valley Independent Living Center**

Daveed Mandell  
**San Francisco Chapter California Council  
of the Blind**

Hoai-An Truong, Leadership Team  
**Mothers Out Front Silicon Valley**

# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 21-1009      **Version:** 1      **Name:**

**Type:** Report      **Status:** Informational

**File created:** 7/19/2021      **In control:** Blue Ribbon Transit Recovery Task Force

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**Attachments:** [Item 6b Memo](#)  
[Item 6b Draft Transit Transformation Action Plan](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Draft Transformation Action Plan

**Attachments:**

BLUE RIBBON

**TRANSIT RECOVERY  
TASK FORCE**

TO: Blue Ribbon Transit Recovery Task Force Members

DATE: July 26, 2021

FR: Steve Kinsey, CivicKnit

RE: Draft Transit Transformation Action Plan

Attached is a Draft Transit Transformation Action Plan (Action Plan) for your review and comment. This document will be finalized after the conclusion of the Task Force (in August).

The Draft Action Plan is intended to be a distillation and culmination of the past year's work. As you review the Action Plan, please note the following:

- The Action Plan compiles and repurposes Task Force memos, presentations, and approved items. No new content is being introduced.
- Actions and discussions of the Task Force have been summarized in the Action Plan. As appropriate, the full details of the Task Force's actions have been included in an appendix.
- Portions of the draft document are still in Word while other sections are included in a draft layout.
- A sample format of the Action pages has been inserted to demonstrate how the Action pages might look. Once the action items are approved at the July 26<sup>th</sup> meeting, the Actions will be updated for the final formatted Action Plan.

As a reminder, the Task Force will only be voting on the specific actions at the July 26<sup>th</sup> meeting. Afterwards, MTC staff will incorporate the approved actions into the Action Plan, address any comments, and produce the final plan.

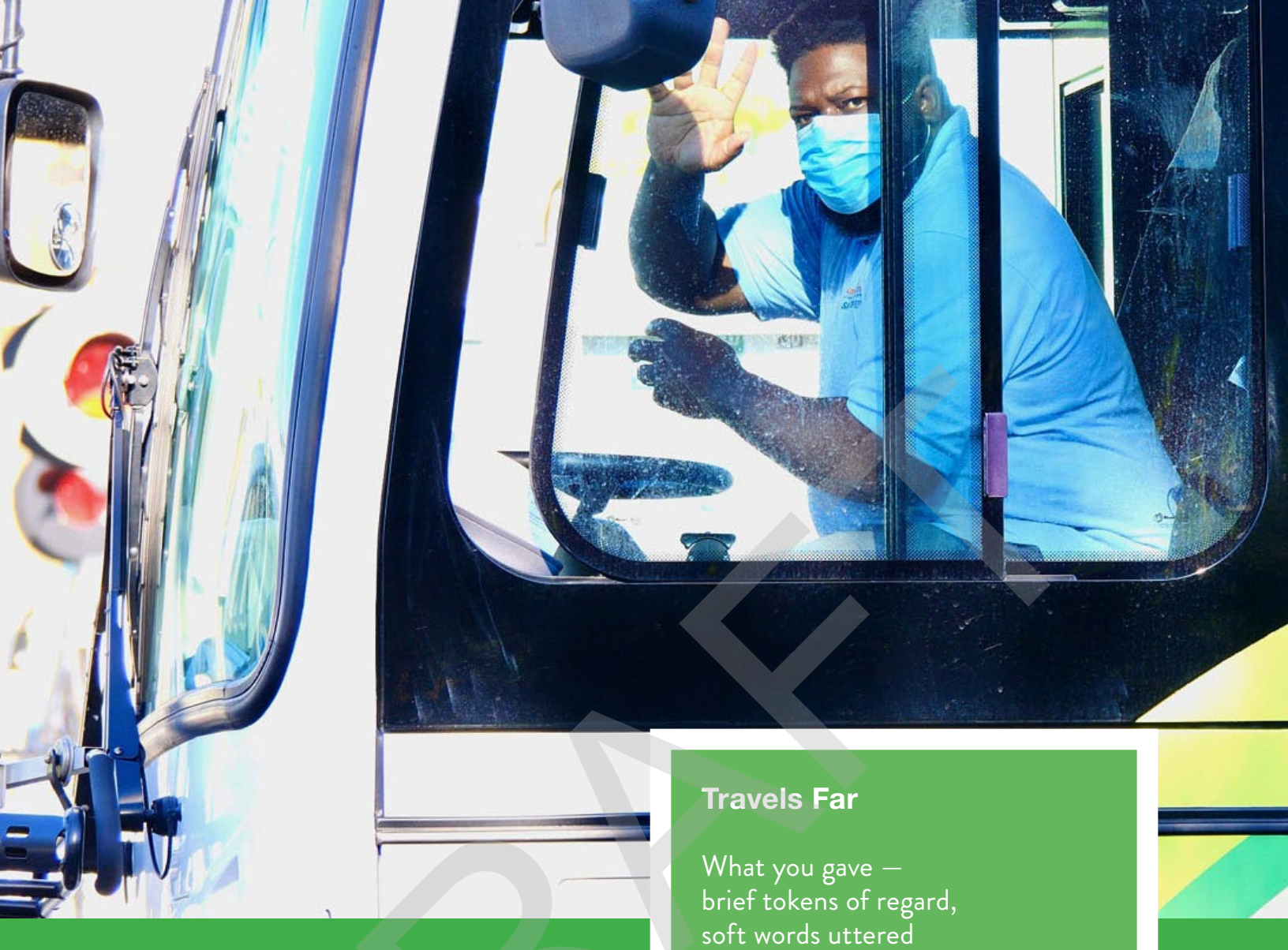
Task Force members and the public may comment on the Draft Action Plan document at the meeting or subsequently through August 2<sup>nd</sup> by sending comments to [steve@civicknit.com](mailto:steve@civicknit.com). A final version of the document will be sent to all Task Force members and posted on the MTC website upon its completion, expected in late August.



# BAY AREA TRANSIT TRANSFORMATION **ACTION PLAN**

DRAFT

July 2021



## DEDICATION

*We are forever grateful for the  
commitment and perseverance of the  
Bay Area's transit workers who serve  
our community through good times and  
bad, and who held together our region's  
essential worker lifeline throughout  
the COVID-19 pandemic.  
Thank you.*

## Travels Far

*What you gave —  
brief tokens of regard,  
soft words uttered  
barely heard,  
the smile glimpsed  
from a passing car.*

*Through stations  
and years, through  
the veined chambers  
of a stranger's heart —  
what you gave  
travels far.*

*— Tracy K. Smith*

*Tracy K. Smith is an American poet and  
educator. She served as the 22nd Poet Laureate  
of the United States from 2017 to 2019.*

## ACKNOWLEDGEMENTS / TASK FORCE ROSTER

Task Force members and public participants alike deserve appreciation for generously giving their time and attention to this exercise in civic engagement and shared problem-solving.

*Full Task Force roster  
(including members who served a partial term or who changed affiliation during BRTF)*

# MESSAGES FROM THE CHAIRS



**Alfredo Pedroza**  
Chair, Metropolitan  
Transportation  
Commission

Over the past 16 months, COVID-19 has wreaked havoc across our communities and in our personal lives. Public transit services collapsed overnight and will take years to recover. MTC created the Blue Ribbon Transit Recovery Task Force to bring key stakeholders and transit operators together to build unified support during this existential crisis that public transit is facing.

In rebuilding and strengthening transit's vital role in the Bay Area's sustainable future, I stand with those who are determined to rebound equitably by investing resources in ways that overcome historic and current disparities for our most vulnerable communities.

Transforming our transit system while we recover will be challenging. Success depends upon continuing collaboration among all transit partners and fast-tracking customer improvements that will attract new riders and reward returning ones. Prioritizing coordination, capturing operational efficiencies, and securing funding are each essential to achieve the excellent transit system the region deserves.

MTC is committed to taking a leading role in this effort toward transformative outcomes, and continuing our priority focus on fares, mapping and wayfinding, and creating transit travel time advantages on our streets and highways. We also recognize that a strong partnership with transit operators, the private sector, advocates, and the public will be essential to creating a reliable, convenient, and connected transit network.

As the work of the Task Force ends, I want to thank everyone who contributed to this robust blueprint for change. As Chair of the Commission, I have directed MTC staff to review this Action Plan and bring forward a recommendation for Commission adoption in September followed by a proposed Year 1 work program by October 2021.



**James P. Spering**  
Chair, Blue Ribbon  
Transit Recovery  
Task Force

The Blue Ribbon Transit Recovery Task Force was convened in May 2020 in response to the COVID-19 pandemic, and its first charge was to advise MTC on the fair distribution of federal relief funds. Next, it supported transit operators' efforts to determine essential public safety commitments as COVID protocols were evolving.

This Plan is the culmination of the Task Force's work and includes identifying specific, near-term actions needed to achieve a more connected, efficient and user-focused mobility network across the Bay Area and beyond.

Thanks to all 32 Task Force members who spent over a year deep in collaborative dialogue in a respectful search for consensus. Special appreciation goes to the nine transit-agency general managers who actively contributed while tackling historically severe impacts in their organizations.

The Task Force benefitted from California Secretary of Transportation David Kim's statewide perspective throughout. State Assemblymember David Chiu's unwavering commitment to seamless transit and his guiding-force clarity deserve special tribute. Enormous gratitude is offered to all transit workers for their steadfast service during this health crisis.

While meeting virtually was tedious at times, our format provided each Task Force member, as well as members of the public, the opportunity to speak. I also appreciate MTC staff's inclusive outreach in support of the Task Force, reflecting the group's adopted Equity Principles.

In truth, we took the opportunity afforded by the crisis to initiate changes that have long been recognized as building blocks of a world-class transit network. I'm proud of the work we've done and hope this Action Plan will inspire MTC and the wide array of community stakeholders and agency partners to move swiftly, and equitably – with primary focus on the customers we serve – to achieve the bold aspirations embedded in Plan Bay Area 2050.



*(left side)*

## **PREAMBLE**

“Change is hardest in the beginning, messiest in the middle, and best at the end.”

Robin Sharma

2020 began as a normal year in the San Francisco Bay Area. Perennial issues associated with housing, transportation and the economy churned along. FASTER Bay Area, a coalition of community and business groups, were finalizing their legislative request to place a \$100 Billion ballot measure to fund a seamlessly integrated, world-class transit system before voters in the Fall.

By February 3rd, Assembly Member David Chiu had introduced AB 2057 which called for creating a Bay Area Seamless Transit Task Force to send the Legislature a report proposing reforms to the governance of the BayArea’s dozens of transportation agencies to maximize the performance of the entire public transit system by January 1, 2023.

Silently and unseen, the nation was also experiencing the first cases of what would become an unprecedented health crisis. The federal government announced the first confirmed case of COVID-19 in the United States on January 21st. Just ten days later, the World Health Organization declared a “global health emergency” and then elevated their declaration to “global pandemic” status on March 11th due to alarming levels of spread. On March 13th, a National Emergency was declared in the U.S. and within a week, California became the first state to issue a stay-at-home order mandating all residents to remain at home except to go to an essential job or shop for essential needs. Life in the Bay Area changed instantly. Since then, over 450,000 Bay Area residents have been infected with the COVID virus and nearly 6,000 persons lost their lives.

As government, business and families struggled to respond to an extraordinary crisis, public transit ridership and revenues collapsed, creating an existential crisis for transit, and exacerbating and vastly deepening the pre-existing problem of declining demand for transit in the region. The Metropolitan Transportation Commission (MTC) moved quickly to respond to the immediate crisis while simultaneously recognizing that times of challenge and pain could offer a fertile opportunity to plant the seeds of transformation for the Bay Area’s public transit system. With that in mind, the Commission on April 21<sup>st</sup> established the Blue Ribbon Transit Recovery Task Force to set a course of transit’s recovery and long-term improvement.

## TABLE OF CONTENTS

*(SAMPLE ONLY – to be updated once document is finalized)*

- Acknowledgements / Task Force Roster
- Messages from MTC Chair Alfredo Pedroza and Task Force Chair Jim Spering
- Preamble
- Executive Summary
- Approach: The Blue Ribbon Transit Recovery Task Force
- Spotlight: Equity
- Context: Identifying the Problem
- Spotlight: Public Opinion Research
- Action Plan: Outcomes & Actions
  - Actions by Outcome
  - Action Schedule
- Action Plan Next Steps
- Glossary
- Appendices

## EXECUTIVE SUMMARY

On April 21, 2020, the Metropolitan Transportation Commission (MTC) established a 32-person Blue Ribbon Transit Recovery Task Force (Task Force) to set a course for public transit's recovery and long-term improvement. MTC Commissioner James Spering was appointed to serve as Chair. The group was composed of a diverse set of stakeholders, including California State Transportation Agency Secretary David Kim, two state legislators, eight MTC commissioners, the MTC executive director, nine transit agency general managers, and representatives of business, labor, social justice, persons with disabilities, transit advocates, county transportation agencies and MTC's Advisory Council. The Task Force met 15 times between May 2020 and July 2021.

### **"Transit Transformation"**

#### **Definition:**

Design, adequately invest in and effectively manage a public transit network that is equitable, inclusive, frequent, affordable, accessible, and reliable; is integrated with unified service, fares, schedules, customer information and identity; and serves all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

The Task Force was given a three-stage purpose:

- Stage 1- Assist in distribution of \$500 million in remaining federal Coronavirus Aid, Relief, and Economic Security (CARES) Act relief funds.
- Stage 2- Contribute to operators' recovery planning.
- Stage 3- Develop a Bay Area "Transit Transformation" action plan identifying actions needed to reshape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area and beyond.

Stage 3 was the Task Force's most complex assignment. Over a ten-month period, the Task Force actively debated among its members, listened to public comment, and reached consensus on crucial building blocks that informed the development of an action plan.

These building blocks included:

- Goals and Objectives
- Equity Principles
- Problem Statement
- Key outcomes
- Network management roles and responsibilities
- Alternative network management governance options

The culmination of the work of the Task Force is the *Bay Area Transit Transformation Action Plan* (Action Plan). This plan focuses on the near-term actions (within three years) needed to begin transforming a fragile and fragmented network into a more connected, more efficient, and more user-focused mobility network that attracts many more users. It identifies five desired outcomes that are central to achieving transit transformation and 27 associated actions.

### **Transformation Action Plan Goals & Objectives (adopted Nov 16, 2020)**

**Goal 1:** Recognize critical recovery challenges facing transit agencies.

**Goal 2:** Advance equity.

**Goal 3:** Identify near-term actions to implement beneficial long-term Network Management and Governance reforms.

**Goal 4:** Establish how current MTC and state transit initiatives should integrate with Network Management and Governance reforms.

*See Appendix for complete Goals & Objectives*

**(Inset box)**

**TRANSIT TRANSFORMATION OUTCOMES**

- Simpler, consistent, and equitable fare and payment options attract more riders.
- Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.
- Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.
- Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.
- The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

Several important features are built into the Action Plan.

- Ongoing collaboration among operators, MTC and the spectrum of transit stakeholders is essential to achieving a common vision.
- Elevating the urgent needs of the region's disadvantaged and low-income populations is central to planning and investment.
- MTC's existing authority should be exercised fully to implement the plan's recommended actions.
- Actions intended to accelerate work already underway at MTC on three important customer-focused initiatives – fare integration, unified mapping and wayfinding, and travel time advantages for buses – are high-priority near-term actions.
- A business case analysis of institutional reforms with input from a multi-stakeholder advisory body is necessary to confirm implementation next steps.

This Action Plan focuses on near-term steps that generate needed customer benefits while simultaneously building toward longer-term system improvements. Transit transformation will take many years to achieve, and the Action Plan's identified actions will not be sufficient on their own. Independent and collaborative efforts by all transit agencies must continue and expand. Joint legislative advocacy and consistent public communication must be bolstered. Partnerships must be forged through the rail partnerships and governance assessment grant and integrated with the Action Plan as it is implemented.

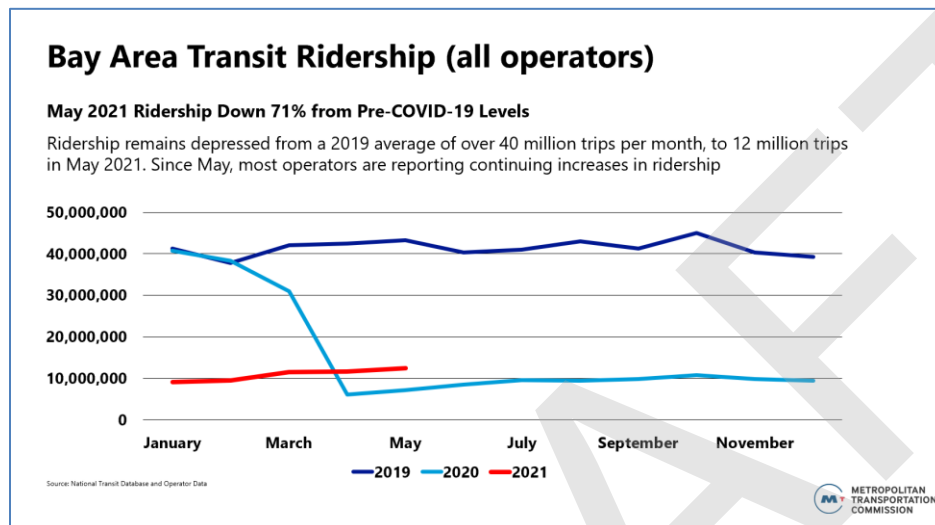
The Task Force jump-started this journey and has generated momentum, but restoring and growing transit ridership in the Bay Area will require an ongoing effort across multiple geographies and levels of government. Much of this work is and will continue to be focused at the local and sub-regional levels – where most transit trips occur. As the pandemic subsides, however, there is also a significant and not-to-be-missed opportunity to create an efficient, coordinated and customer-friendly system that enables Bay Area residents and visitors alike to confidently navigate across the region's transit system with speed and ease.

The Action Plan's ultimate success will depend on a commitment by MTC and transit agencies to embrace changes that put the customer first, continued collaborative efforts with stakeholders, jointly developed legislative initiatives, and vital new sources of transit funding.

## APPROACH: THE BLUE RIBBON TRANSIT RECOVERY TASK FORCE

### A Crisis for Public Transit

The COVID-19 pandemic and the economic disruption associated with it have created the most serious and complex crisis for public transit in Bay Area history. Stay-at-home orders and public health concerns resulted in a dramatic drop in ridership on Bay Area transit – and it is unclear when, and to what extent, transit ridership will return to pre-pandemic levels.



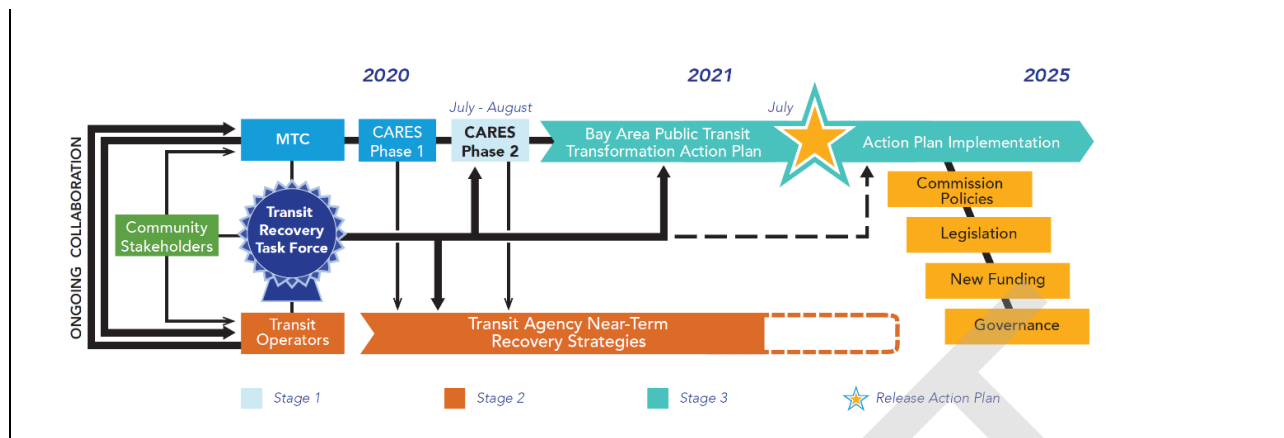
GRAPH SOURCE: National Transit Database and Operator Data

At the end of 2020, ridership across the Bay Area was down by a crippling 77 percent. This loss of riders generated an acute and existential near-term crisis for our transit system, deepening the pre-existing condition of falling demand for transit across the nine counties. If not reversed, this decline in ridership threatens to debilitate our transit system, jeopardizing both the near- and long-term financial viability of individual transit operators and negatively impacting Bay Area transit riders.

### Task Force Stages

In April 2020, the Metropolitan Transportation Commission (MTC) appointed the 32-member Blue Ribbon Transit Recovery Task Force to immediately assist MTC with understanding the scale of the crisis facing Bay Area transit agencies as a result of the COVID-19 pandemic -- and responding to the crisis.

## TASK FORCE STAGES / PROCESS



### Stage 1: Survival

The first stage of the Task Force's work was to recommend to the Commission a fair and thoughtful distribution of \$500 million in phase 2 federal CARES Act relief funds to the Bay Area's 27 transit operators. Retaining service for essential trips serving low-income and vulnerable riders was confirmed as the highest priority.

### Stage 2: Recovery

In the second stage of its work, the Task Force focused on transit operators' near-term recovery strategies and supported their collaborative recovery practices. Rider and transit employee safety, consistent cleaning protocols, and transparent public communication were key Task Force interests. Two products of this stage were the Bay Area Healthy Transit Plan, outlining common public safety commitments and expectations for transit employees and passengers, and a "Return to Transit" communications toolkit to support a regional marketing campaign that Bay Area transit agencies plan to launch in August of 2021.

### Stage 3: Transformation

In the third and final stage of its work, the Task Force embarked on identifying high priority, customer facing improvements to the Bay Area transit network that would help turn the tide on falling ridership despite the serious funding shortages that transit agencies anticipate in the years to come. In recognition that the future of Bay Area transit will undoubtedly be different than before COVID 19, the Task Force focused on finding ways to make Bay Area transit more attractive for riders.

During its term, the Task Force set Goals and Equity Principles for the Action Plan, jointly developed a Problem Statement, considered the wide range of network management roles and responsibilities, and selected those that should be evaluated for near-term actions. It also heard presentations on current State and MTC related initiatives, agency integration progress in Sonoma County, and public opinion research. It invited Task Force members to submit alternative governance proposals to support the Action Plan's implementation.

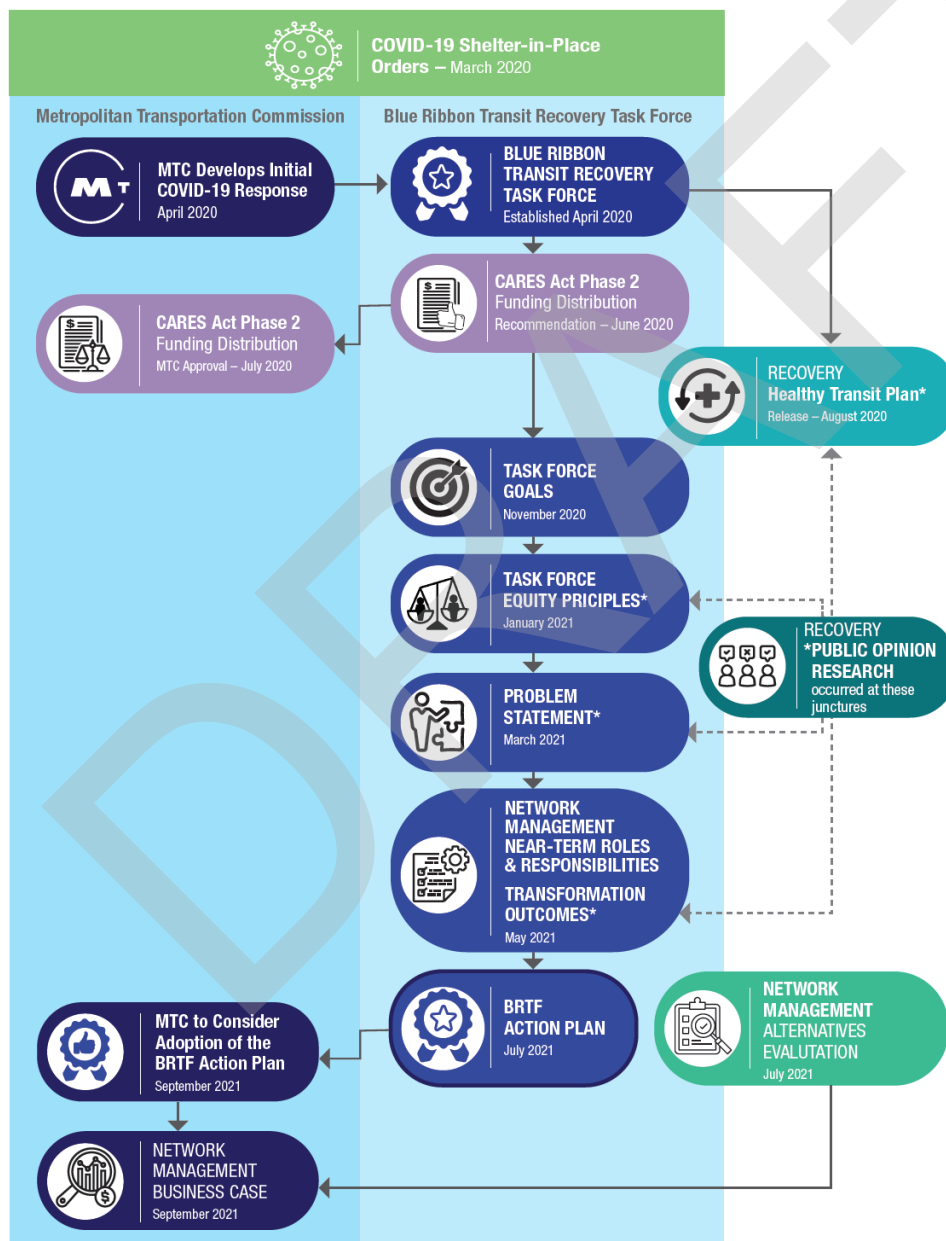
A team of transit management and design professionals considered the Task Force's work, reviewed the submitted governance proposals, and interviewed a cross-section of stakeholders before developing its own network management alternatives and comparing them. Their report also identified how their work leads into a more detailed business case analysis.

The Task Force's final act is to submit this *Bay Area Transit Transformation Action Plan* to MTC for its consideration and possible adoption. The Action Plan identifies actions needed to re-

shape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area and beyond.

Restoring and growing transit ridership in the Bay Area will require an ongoing multi-front effort to address the challenges transit faces across multiple geographies and levels of government. Much of this work is and will continue to be focused at the local and sub-regional levels – where most transit trips occur. As the pandemic subsides, however, there is also a significant and not-to-be-missed opportunity to create an efficient, coordinated and customer-friendly system that enables Bay Area residents and visitors alike to confidently navigate across the region's transit system and beyond with speed and ease.

## GRAPHIC INSERT – JOURNEY OF THE TASK FORCE



# SPOTLIGHT: EQUITY

**Residents of the Bay Area, much like the United States as a whole, have dramatically different household incomes, educational attainment and health outcomes depending on race. These differences reflect generations of exploitative and discriminatory policies that denied black, indigenous and people of color the opportunities afforded to white Americans. COVID-19 further exacerbated America's long-standing disparities: the disease spread more easily in under-resourced areas and imposed greater risk on low-income, transit dependent and low-wage essential workers who often had to work in less safe conditions.**

While a significant number of Bay Area workers shifted to remote work overnight, a disproportionate share of people of color did not have this option, working as essential or low-wage workers in settings where they were at higher risk of exposure to COVID-19. As shelter-in-place orders took hold, only those with no other choice remained on transit, and were especially impacted by cutbacks in service and social distancing rules that placed limits on passenger capacity.

The Blue Ribbon Transit Recovery Task Force recognized these harsh and unfair consequences, and sought to address equity in its work. At the core of transit equity is the notion that transit is a fundamental public good – equitable and inclusive –that everyone benefits from, regardless of age, race, gender identity, disability, or class.

An equitable transportation system is one that is safe, affordable, and reliable in meeting the needs of all residents, but especially those with the fewest options. Equity also means thoughtful consideration of who benefits from a transportation investment when prioritizing projects. Quality service should be affordable and accessible.

One of the Task Force's four Plan Goals (see page X) called for the inclusion of input from underserved populations, transit-dependent riders, and persons with disabilities to inform this Action Plan.

The Task Force also adopted five Equity Principles central to planning and operations (at right), based on



## Blue Ribbon Transit Recovery Task Force Equity Principles

### INVEST EQUITABLY

Prioritize equitable planning, policies, decision-making, and implementation through proportionally greater investments in communities of color and low-income communities to address transit disparities and reflect needed mobility options.

### INCREASE ACCESSIBILITY

Increase transit access, prioritize service investments, and improve travel experiences for seniors and riders with disabilities and/or low incomes by increasing fare affordability and service connectivity.

### BE INCLUSIVE

Pursue anti-racist strategies as a core element of transit's mission and actions. Ensure full participation of underserved residents to co-create strategies and solutions by engaging meaningfully and directly, in partnership with culturally specific, community-trusted local organizations.

### USE DATA TO INFORM DECISIONS

Make people-centered and transparent transit investment and strategy decisions by collecting and using race, gender identity, disability, age and income data. Routinely monitor data to ensure equitable investments for underserved communities.

### ADVANCE HEALTH & SAFETY

Incorporate public health and safety measures for transit riders and staff in the day-to-day operations of the transit system. Partner with social service and public health agencies to improve personal health and safety of riders and staff.

**“TRUE INCLUSION, AUTHENTIC INCLUSION, IS [WHEN] THE PEOPLE WHO WE SAY WE WANT TO FEEL WELCOME ACTUALLY HAVE SOME DECISION-MAKING POWER.”**

**“WE MUST LOOK BACK AT THE INJUSTICES IN THE POLICIES AND DESIGNS WHICH WERE ACTIVELY RACIST IN ORDER TO BE INTENTIONALLY ANTI-RACIST. HOW DO YOU LOOK AT THE PAST, THE PRESENT, AND THE FUTURE ALTOGETHER TO INFORM DECISIONS, SO YOU DO NOT REPEAT RACIST ACTIONS MOVING FORWARD?”**

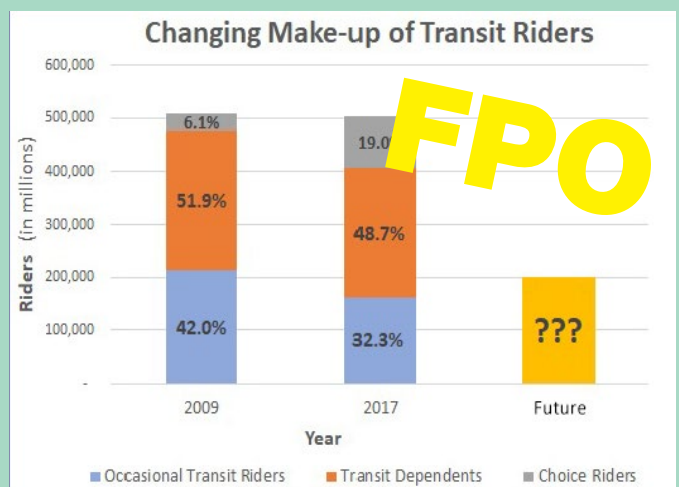
– Insights heard during Blue Ribbon listening session with Bay Area CBO leaders, January 14, 2021

input directly from disadvantaged riders and community leaders. These principles can serve as a compass to continually point leaders, public agencies, advocates, and communities toward an equitable and lasting recovery.

The Task Force’s adopted Problem Statement (see Appendix 2) acknowledges historic disparities facing persons of color due to failed housing and lending practices and cites the lack of a unified plan in the region plan to address the legacy of disenfranchisement and marginalization.

As our transit system starts to rebuild, this Action Plan seeks to achieve specific, near-term actions that advance equity including addressing customer experience through more integrated fares that reward frequent riders; faster, more frequent service to improve travel speeds for those who rely on transit; and improvements to paratransit.

In partnership with transit agencies, community-based and non-profit organizations, and equity-priority communities, MTC has an opportunity to accelerate progress toward equity goals. This Action Plan also calls for MTC to adopt Transit Equity Principles and develop a process for applying them, an endeavor that could help address enduring injustices and have wider-reaching impacts for transit equity. The expanded use of equity analyses and inclusive decision-making, for example, could shape transit investments by prioritizing funding for projects that expand access to opportunity to underserved residents and those with lower incomes.



*What can data tell us? Who is riding transit now? How do we meet the needs of current riders? What other data do we need now and in the future?* (SOURCE: UCLA study?)

## CONTEXT: IDENTIFYING THE PROBLEM

### Challenges Existed Prior to the Pandemic

Even before the pandemic, transit ridership in the Bay Area was falling. A 2020 study completed by UCLA's Institute of Transportation Studies determined that in 2017 and 2018, the Bay Area lost over 5 percent of its annual riders despite a booming economy and service increases. The decline occurred even as most major operators increased service in terms of both mileage and hours of operation. The steepest ridership losses came on buses, at off-peak times, on weekends, in non-commute directions, on outlying lines, and on lines that did not serve the region's core employment clusters. The study cited a growing jobs-housing imbalance and displacement of low-income residents to less transit rich neighborhoods as contributing factors, along with app-based ride-hail services as possible causes of declining transit ridership.

Transit also faces financial challenges in the Bay Area and the United States as a whole. Compared with systems abroad, public transit in the United States is underfunded. Operating expenses are subject to inflationary pressures that outpace revenue growth, particularly with respect to health care costs which are covered by national insurance programs in many countries with strong transit systems. Capital construction costs are another challenge, particularly for megaprojects which often encounter huge cost overruns. Locally generated sales or property taxes have restrictions limiting an agency's ability to provide service improvements outside their jurisdiction, and a demonstration of local return on investment is critical to gaining and retaining public support. Relatively low gasoline prices also make it harder for public transit to compete with the automobile.

If not reversed, this decline in ridership could plunge the region's transit system into a downward spiral, jeopardizing both the near- and long-term financial viability of individual transit operators, negatively impacting riders,

### INSET BOX: PROBLEM STATEMENT

In March 2021, the Task Force approved a problem statement that identified a broad range of transit challenges across four categories. *See Appendix for full Problem Statement.*

**Problem Statement Summary:** Public transit services in the San Francisco Bay Area are operated by 27 agencies, each with its own unique policies, procedures, and operating practices best suited for their immediate service areas and local priorities; and not organized to support customer-friendly, inter-agency travel. Strong collaborative action is needed to restore and grow transit ridership to reach the ambitious targets associated with Plan Bay Area 2050's vision of a more affordable, connected, diverse, healthy, and vibrant Bay Area for all.

- **Organizational/ Institutional Challenges:** Network management resources and authority; multiple agency coordination; addressing transit priority and rights-of-way; local-school access and inter-agency paratransit service; and data collection and management.
- **Customer Experience:** Addressing schedule coordination; fares; trip-planning services; and health and safety concerns.
- **Past and Current Disparities:** Addressing regional housing and development policies; access to opportunity; and inclusive planning.
- **Transit Costs and Funding:** Addressing funding disparities; barriers to raising revenue; integrated revenue strategies; administrative and operational efficiencies; and trade-offs.

particularly those who rely upon it as their primary mode of transportation, and fundamentally undermining the value of the public's past investments in transit as a public good. In addition, the region's roadway system has insufficient capacity to absorb the traffic increase that would occur with the collapse of the Bay Area's transit systems, creating traffic gridlock as well as an increase in greenhouse gas and other vehicle emissions harmful to air quality.

### **Transit Transformation is Not a New Idea**

To avoid these negative impacts that would result from the collapse of the region's transit system, we must identify the major challenges facing transit, confront them directly, and identify a path toward a flexible, affordable, well-funded transit system that more people will use for more trips. We need to reverse transit ridership's downward trend by making the system a more attractive choice than the automobile.

Over the last several decades, the region has pursued various transit reform initiatives and major capital investment programs towards this end.

- In 1998, MTC adopted Resolution 3055, MTC's Transit Coordination Implementation Plan pursuant to SB 1474 (Kopp, 1996). That resolution was revised four times and superseded by MTC's Resolution 3866 in 2010, which includes requirements applicable to Clipper and fare media, transit information displays, hub signage, paratransit, and transit rider surveys.
- In 2004, voters approved Regional Measure 2, providing significant operating and capital investment in transit, promotion of transit commuter benefits, and requiring a regional transit connectivity plan, an integrated fare study, benefits, and a regional rail master plan.
- In 2012, MTC adopted the Transit Sustainability Project, which identified specific goals and objectives related to ridership, customer-focus, and regional coordination.
- In 2018, voters approved Regional Measure 3, which included additional funding for transit operating expenses and major capital expansion, including funding to begin the design of a new transbay rail tube, significantly expanding ferry service and extending BART to San Jose.
- In 2019-2020, FASTER, a multi-stakeholder effort, developed a strategy and funding plan to achieve more coordinated transit planning, effective project delivery, and more integrated fares and schedules.
- In 2020, Assemblymember Chiu introduced AB2057, which proposed a pilot of a multi-agency transit pass, development of an integrated mapping and wayfinding system, and establishment of a task force to identify governance changes needed to bring about a seamless public transit network.
- In 2021, the first year of a new two-year legislative session, Assemblymember Chiu introduced an updated bill, AB 629 to continue his effort to bring about more integrated transit fares, an integrated mapping and wayfinding system, and real-time transit information.
- In 2021, MTC's Plan Bay Area 2050 Blueprint identified several beneficial transit program enhancements needed to create an expanded, fast, frequent, efficient, and safe multi-modal transportation system that would substantially grow transit ridership.

Despite these efforts, significant barriers to the Task Force’s vision remain and must be addressed if the Bay Area is to reverse its downward ridership trend.

### **A Call to Action**

Today, even more than before the COVID-19 pandemic, the Bay Area must take the steps needed to bring back transit riders. Difficult decisions will be needed that should be guided by a fact-based, constructive discussion about change. The Task Force has grappled with how best to reposition the region’s transit system to deliver a more effective and efficient transit system that more people will use for more trips – and thereby build a foundation for future financial support.

#### **INSET BOX:**

#### **MTC’s Transit Coordination Authority**

As the regional transportation planning agency (RTPA, a state designation) and metropolitan planning organization (MPO, a federal designation) for the nine-county San Francisco Bay Area, MTC has considerable responsibility and authority with respect to funding and coordinating the region’s more than two dozen public transit systems. Chief among them is the distribution of state and federal funding. While the funding amounts provided to individual transit agencies for some programs is determined on a formula basis, the Commission has discretion over hundreds of millions of dollars in annual federal funds as well as the population-based portion of State Transit Assistance funds, providing a combined total of approximately \$600 million per year.

Beginning in the 1980s and culminating with enactment of SB 1474 (Kopp) in 1996, the State Legislature gave MTC increasing levels of responsibility to adopt policies requiring the coordination of routes, schedules, fares, and transfers and to condition the disbursement of both revenue-based and population-based STA funds on compliance with these requirements. In 2003, the Legislature expanded on this authority with the enactment of SB 916 (Perata), which required MTC to adopt and regularly update a Regional Transit Connectivity Plan and to condition receipt of Regional Measure 2 bridge toll funds on compliance with that plan.

MTC implements these transit coordination requirements through Resolution 3866, which was updated most recently in 2015 and lists out the transit coordination requirements operators must abide by as a condition of receiving any MTC discretionary funds. It contains three key elements: (1) transit coordination implementation requirements applicable to 511 traveler information, regional transit hub signage, Clipper® implementation, maintenance of coordinated service, transit rider surveys; (2) fare and schedule requirements; and (3) regional transit information displays.

Resolution 3866 can be updated by the Commission to incorporate additional requirements or modify existing ones after consultation with a technical advisory committee of transit operators, followed by input from the Partnership Transit Coordination Committee or PTCC—the renamed Regional Transit Coordination Council, which SB 1474 required MTC establish—comprised of MTC’s Executive Director and the region’s transit agency general managers. The PTCC has not met formally since the last Resolution 3866 update in 2015 but will be reconvened if items in this Action Plan are proposed for incorporation into an update of the resolution.

# SPOTLIGHT: PUBLIC OPINION RESEARCH

The Blue Ribbon Transit Recovery Task Force was informed by wide-reaching public opinion research and feedback from targeted focus groups. The findings helped the Task Force to understand public perceptions of transit before the pandemic, during, and looking into the future; to hear the perspectives of underserved groups; and to gauge the public opinion regarding “seamless transit” legislation, a more integrated Bay Area transit system, and increased network management.

The findings presented to the Task Force were based on reviews of prior related research, community focus groups, employer focus groups and surveys, a statistically valid poll of Bay Area residents, and

A BETTER FUNCTIONING TRANSIT SYSTEM IS SEEN AS CRITICAL FOR EVERYONE IN THE BAY AREA, NOT JUST TRANSIT RIDERS.

**THE VAST MAJORITY (87%) OF BAY AREA RESIDENTS POLLED BELIEVE PUBLIC TRANSIT IS IMPORTANT.**

– Blue Ribbon Transit Recovery Task Force  
Public Opinion Poll, April 2021

numerous community focus groups in English, Spanish, Cantonese, and with persons with disabilities.

A primary and overarching finding from the research was that certain factors consistently and persistently influence how often people ride transit in the Bay Area. People are most likely to ride when they feel that transit service is simple to understand and easy to use; is reliable, predictable, and frequent; and is safe and clean, affordable, accessible, and connects them to their destination.

Better connectivity and coordination across modes and agencies stands out in the research as a way to improve convenience and ease of travel and increase ridership, including:

- Better transit connections between modes and agencies.
- Better coordination between agencies on fares and schedules.
- Better coordination with other forms of transportation, such as on-demand ride services, bike and scooter share, paratransit, and other first/last mile options

The poll also showed that 90% of Bay Area residents support legislation to coordinate the Bay Area's public transit systems so they operate as one seamless, multimodal system — including consistent mapping and signage to make transit easier to navigate, regional fares so riders pay one fare for their entire trip even if they must transfer, and real-time vehicle location data so riders know when a bus, train, or ferry will arrive.

## Everyone wants the same things:

**92%** find real-time information on wait times and vehicle locations important

**91%** find more direct service, fewer transfers, and shorter wait times important

**88%** find a regional network that can set fares, align routes and schedules, and standardize information important

**92%** find easy to use and uniform maps and signage important

**90%** find a single mobile app for planning, schedules, and information important

**89%** find a single set of fares, passes, discounts, and transfer policies important

**80%** find dedicated travel lanes along key transit routes for buses and carpools important

Source: Blue Ribbon Transit Recovery Task Force Public Opinion Poll, April 2021

## ACTION PLAN: OUTCOMES & ACTIONS

The *Bay Area Transit Transformation Action Plan* identifies five outcomes that would constitute substantial progress towards the Transit Transformation vision and 27 near-term actions needed to achieve them.

Each Action is targeted for completion within one-to-three years and can be achieved through a combination of existing resources, increased efficiencies, and new funding. To succeed, funding and staffing resources must be identified and collaboration among transit agencies, MTC and other stakeholders will need to continue and increase. Target completion dates are preliminary and subject to continued evaluation and refinement.

OUTCOMES
<ul style="list-style-type: none"><li>• <b>Fares &amp; Payment:</b> Simpler, consistent, and equitable fare and payment options attract more riders.</li><li>• <b>Customer Information:</b> Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.</li><li>• <b>Transit Network:</b> Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.</li><li>• <b>Accessibility:</b> Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.</li><li>• <b>Funding:</b> The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.</li></ul>



### Steps on the Path to Transit Transformation

The actions outlined in this plan are steps that will build toward a transit vision requiring many years to fulfill. These near-term actions will yield immediate customer benefits while building momentum for longer-term improvements. The Action Plan's identified actions will not be sufficient on their own to achieving transit transformation; independent and collaborative efforts by all transit agencies must continue and expand. Joint legislative advocacy and consistent, well-researched public communication must be bolstered. The current grant-funded assessment of rail partnerships and governance, which did not synchronize with the Action Plan's timing, is an example of an important related effort that may yield significant new recommendations related to transit transformation.

### Accelerated Actions

Central to this Action Plan is an endorsement of three initiatives that were underway before the pandemic and were widely supported by the Task Force as being robust, transformative, and impactful. The Action Plan recommends that MTC prioritize these efforts for accelerated action.

- Fare Integration and Policy
- Mapping and Wayfinding
- Bus Transit Priority on Roadways

### Network Management Evaluation

The Task Force requested that an independent assessment of network management alternatives be completed prior to the sunset of the Task Force to serve as the foundation for a more in-depth business case evaluation of these alternatives.

In developing their assessment of network management alternatives, the consultant team reviewed the Task Force's prior work, interviewed a range of Task Force members, utilized a half-day Ad Hoc Committee workshop and the June Task Force meeting to frame their evaluation criteria and governance options. They presented a Summary Report that compared governance models and proposed a framework for evaluating specific reforms before implementing them. This work took place in parallel to the Task Force's work in developing the Action Plan.

### **Rail Partnerships and Governance Assessment**

Independent but related to the Network Management Alternatives business case is a current grant-funded assessment of rail project governance and management. This rail assessment will be initiated in late summer 2021 and will evaluate various regional rail governance alternatives and megaproject delivery approaches across the region. While separate, the rail assessment will inform and be informed by the Network Management Alternatives business case and ongoing rail governance policy considerations throughout the region and the State of California as a whole.

## ACTIONS BY OUTCOME

**Fares and Payment:** Simpler, consistent, and equitable fare and payment options attract more riders.

Network Management Roles & Responsibilities:

### ■ FARE INTEGRATION POLICY

#### CURRENT & ONGOING EFFORTS

- Clipper®
- Clipper START
- Inter-operator transfer policies
- Mobile payment apps

### FARES & PAYMENT

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
<b>ACCELERATED</b>			
<b>1.</b> Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects.	December 2021	MTC, Transit Agencies	TBD
<b>2.</b> Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations.	December 2021	MTC, Transit Agencies	\$
<b>3.</b> Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations.	Mid-2022	MTC, State Legislators	\$

\* Key to Estimated Range of Funding Needs:

\$	= \$0 - 10 million	\$\$\$\$	= \$101+ million
\$	= \$10 - 50 million	TBD	= Estimate not currently available
\$\$\$	= \$51 - 100 million		

ACTIONS BY OUTCOME

**Customer Information:** Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.

Network Management Roles & Responsibilities:

- **BRANDING, MAPPING AND WAYFINDING**
- **TECHNOLOGY AND MOBILE STANDARDS**
- **MARKETING/PUBLIC INFORMATION**

CURRENT & ONGOING EFFORTS

- Return-to-Transit campaign and future regional marketing campaigns
- 511 Infrastructure
- Business groups’ employer surveys
- BART’s station access signage & wayfinding standards update/implementation

CUSTOMER INFORMATION

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
ACCELERATED			
4. Fund and finalize regional mapping and wayfinding standards for application across all operator service areas.	Mid-2023	MTC, Transit Agencies	\$
5. Fund and complete 1-3 consistently branded North and East Bay subregional mapping and wayfinding pilot projects and adopt timeline for subsequent regionwide deployment across all service areas.	Late 2024	MTC, Sonoma, Solano, Eastern Alameda and Contra Costa counties	\$\$
6. Fund and develop a regional mapping data services digital platform, to enable the standardization of digital and paper maps across all transit services.	Late 2023	MTC, Transit Agencies	\$

\* Key to Estimated Range of Funding Needs:  
\$ = \$0 - 10 million      \$\$\$\$ = \$101+ million  
\$\$ = \$10 - 50 million      TBD = Estimate not currently available  
\$\$\$ = \$51 - 100 million

## ACTIONS BY OUTCOME

**Transit Network:** Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.

Network Management Roles & Responsibilities:

- **BUS/RAIL NETWORK MANAGEMENT REFORM**
- **CONNECTED NETWORK PLANNING**
- **CAPITAL PROJECT PRIORITIZATION**
- **BUS TRANSIT PRIORITY**
- **STATION HUB DESIGN REVIEW**
- **DATA COLLECTION AND COORDINATION**

### CURRENT & ONGOING EFFORTS

- Regional transit priority and arterial investment programs
- SFMTA emergency transit lanes
- Bay Bridge and Dumbarton Forward projects
- Blue Ribbon Task Force and related collaborations
- Transit Sustainability Project (TSP)
- Synchronize schedule changes across operators
- Operators' schedule and hub transfer coordination improvements
- Operator's transit hub coordination framework
- Transit connectivity tool (software)
- Regional Annual Transit Passenger Survey (O-D)

### BUS TRANSIT PRIORITY [speed & reliability]

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
<b>ACCELERATED</b>			
7. Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions.	December 2021	CalSTA, MTC	\$
8. Sponsor legislation to remove barriers to transit priority implementation.	Early 2022	MTC, Transit Agencies	\$
9. Fund the design and delivery of prioritized near-term transit corridor projects.	Mid-2022	MTC, Transit Agencies, CTAs	\$\$\$\$

\* Key to Estimated Range of Funding Needs:

\$	= \$0 - 10 million	\$\$\$\$	= \$101+ million
\$\$	= \$10 - 50 million	TBD	= Estimate not currently available
\$\$\$	= \$51 - 100 million		

# ACTIONS BY OUTCOME

## Transit Network: *(continued)*

### BUS TRANSIT PRIORITY [speed & reliability] *(continued)*

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
<b>ACCELERATED</b>			
<b>10.</b> Select near-term HOV lane operating policies to advance to the State.	Mid-2022	MTC, Transit Agencies, CTAs	<b>\$</b>
<b>11.</b> Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way.	Late 2022	MTC, Caltrans, CTAs, Transit Agencies, Cities	<b>\$</b>
<b>12.</b> Fund, develop and adopt a Transit Priority Policy and Corridor Assessment for improving bus speed and reliability on high-transit corridors and arterials, including identification of current bus speeds to establish a baseline.	Late 2023	MTC, Caltrans, CTAs, Transit Agencies, Cities	<b>\$</b>

### BUS/RAIL NETWORK MANAGEMENT REFORM

<b>13.</b> Fund and complete a Business Case analysis of potential network management reforms, including resource requirements and implementation steps.	Mid-2022	MTC	<b>\$</b>
<b>14.</b> Establish and support an MTC advisory group to guide the Network Management Business Case analysis..	October 2021	MTC	<b>\$</b>
<b>15.</b> Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiencies initiatives.	December 2021	MTC, CTAs	<b>\$</b>
<b>16.</b> Deliver Phase 1 Rail Partnership and Governance Assessment grant by late 2021 and Final Assessment by mid-2023.	Late 2021/ Mid-2023	MTC	<b>\$</b>
<b>17.</b> Adopt Transit Equity Principles and a process for applying them.	Mid-2022	MTC, Transit Agencies, CTAs	<b>\$</b>

### CONNECTED NETWORK PLANNING

<b>18.</b> Fund, develop and adopt a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks (such as Rapid Transit), funding requirements and next steps.	Late 2023	MTC, Transit Agencies	<b>\$</b>
<b>19.</b> Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local community access plans and policies.	Late 2023	MTC, Transit Agencies	<b>\$</b>

### DATA COLLECTION AND COORDINATION

<b>20.</b> Establish protocols and implement uniform Realtime and transit pathway data collection as a foundation for providing consistent and accurate customer information.	Mid-2023	MTC, Transit Agencies	<b>\$</b>
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## ACTIONS BY OUTCOME

**Accessibility:** Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.

Network Management Roles & Responsibilities:

■ **ACCESSIBLE SERVICES (INCLUDING PARATRANSIT)**

■ **CENTRALIZED PROGRAM ELIGIBILITY VERIFICATION**

**CURRENT & ONGOING EFFORTS**

- Regional Transit Connection Card (RTC discount)
- Integration of paratransit on Clipper Next Generation

### ACCESSIBILITY

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
<b>21.</b> Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county, consistent with the 2018 Coordinated Plan.	Mid-2022	MTC, Transit Agencies, CTAs	\$
<b>22.</b> Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips.	Late 2022	MTC, Transit Agencies, East Bay, Sonoma County, SF / Peninsula	\$ \$
<b>23.</b> Identify the next steps for the full integration of ADA-paratransit services on Clipper Next Generation.	Late 2022	MTC, Transit Agencies, Paratransit Providers	\$
<b>24.</b> Identify key paratransit challenges and recommend reforms through the Coordinated Plan update.	Early 2023	MTC, Paratransit Providers	\$
<b>25.</b> Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC).	Late 2022	MTC, Bay Area Partnership Accessibility Committee	\$

\* Key to Estimated Range of Funding Needs:

\$	= \$0 - 10 million	\$\$\$\$	= \$101+ million
\$ \$	= \$10 - 50 million	TBD	= Estimate not currently available
\$ \$ \$	= \$51 - 100 million		

## ACTIONS BY OUTCOME

**Funding:** The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

Network Management Roles & Responsibilities:

### ■ FUNDING ADVOCACY

#### CURRENT & ONGOING EFFORTS

- Continue state and federal advocacy efforts for increased transit funding.

### FUNDING

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs
<b>26.</b> Identify cost-saving efficiencies and Network Management funding needs as part of Business Case analysis.	Early 2022	MTC, Transit Agencies	\$
<b>27.</b> Convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit.	Late 2023	MTC, Transit Agencies, CTAs, Stakeholders, the Public, NGOs	\$

\* Key to Estimated Range of Funding Needs:

\$	= \$0 - 10 million	\$\$\$\$	= \$101+ million
\$\$	= \$10 - 50 million	TBD	= Estimate not currently available
\$\$\$	= \$51 - 100 million		

# TRANSIT TRANSFORMATION ACTIONS SCHEDULE

NETWORK MANAGEMENT OUTCOMES		ACTIONS		2021		2022			2023			2024		
				MID	LATE	EARLY	MID	LATE	EARLY	MID	LATE	EARLY	MID	LATE
FARES AND PAYMENT	1. Act on the FCIS recommendations		X											
	2. Determine whether existing authority is sufficient		X											
	3. Seek state legislation for additional authority, if needed				X									
CUSTOMER INFORMATION	4. Fund and finalize regional mapping and wayfinding standards							X						
	5. Fund and complete 1-3 subregional mapping and wayfinding pilot projects												X	
	6. Fund and develop a regional mapping data services digital platform								X					
TRANSIT NETWORK	Bus Transit Priority (Speed and Reliability)	7. Request a Caltrans Deputy Directive on Design Exceptions		X										
		8. Sponsor legislation to remove barriers to implementation			X									
		9. Fund design and delivery of prioritized transit corridor projects				X								
		10. Select near-term HOV lane operating policies to advance to the State				X								
		11. Define a Cooperative Agreement process					X							
		12. Fund, develop and adopt a Transit Priority Policy and Corridor Assessment	X											
	Bus/Rail Network Management Reform	13. Fund and complete a Network Management Business Case analysis				X								
		14. Establish and support an advisory group to guide business case	X											
		15. Provide financial incentives for Integration Efficiencies initiatives		X										
		16. Deliver Rail Partnership and Governance Assessment (2 phases)		PH 1					PH 2					
		17. Adopt Transit Equity Principles				X								
	Connected Network Planning	18. Fund, develop and adopt a Bay Area Connected Network Plan								X				
		19. Adopt a transit hub toolkit								X				
	Data Collection & Coordination	20. Establish protocols and implement uniform Realtime and transit pathway data collection							X					
	ACCESSIBILITY	21. Designate a Mobility Manager in each county				X								
22. Fund one-seat paratransit ride pilot projects						X								
23. Identify steps for ADA-paratransit integration on Clipper Next Generation						X								
24. Identify paratransit challenges and recommend reforms							X							
25. Adopt standardized eligibility practices for disability programs						X								
FUNDING	26. Identify efficiencies and Network Management funding needs			X										
	27. Convene stakeholders to guide transportation funding ballot measure												X	

## **ACTION PLAN: NEXT STEPS**

The *Bay Area Transit Transformation Action Plan* was adopted at the final meeting of the Blue Ribbon Transit Recovery Task Force on July 26, 2021. The Action Plan seeks to advance transit transformation across the entire Bay Area and beyond through near-term actions combined with a commitment from transit agencies to continue jointly tackling planning, finance, communication, and operational issues related to COVID-19 pandemic recovery.

At the conclusion of its work, the Task Force forwarded to the Commission for consideration a charted path for next steps and future efforts to support the Task Force's vision.

### **Summer 2021**

- Launch of Return-to-Transit Campaign (a communications toolkit developed by MTC and the transit operators to unify return-to-transit messaging delivered by individual agencies through a wide range of channels)

### **September 2021**

- MTC to consider adoption of the *Bay Area Transit Transformation Action Plan*
- MTC to consider appointing a limited-term (12-month) advisory group to work with the consultants to complete a business case analysis of Network Management Alternatives.

### **October 2021**

- MTC Workshop to include discussion of Action Plan staffing, prioritization of action items, and funding requirements.
- Convene initial meeting of the Network Management Business Case Advisory Group.
- Kick off business case analysis of Network Management Alternatives.

### **Beyond and Ongoing**

- MTC and transit operators to work on implementing Action Plan items approved by MTC.
- In the first quarter of 2022, MTC will review Action Plan progress.
- Monitor and seek legislation to support the Action Plan or make funding and timing adjustments based on assessment of the efforts.

## **A Shared Responsibility**

This Action Plan is a near-term blueprint for removing barriers that stand in the way of the Bay Area having a world class transit system. It charts the first steps to be taken over the next three years on the path to transit transformation. While the recommendations are directed towards MTC as the convener of the Blue Ribbon Transit Recovery Task Force, its implementation will depend on the cooperation of the 27 transit agencies, who each have independent control over their fares, schedules, route design, transfers, communication, and mapping and wayfinding.

Over the long-term, achieving transit transformation will require substantial additional funding to provide the level and quality of service needed to attract many more riders. Gaining support for these funding increases, some of which are likely to require support by over two-thirds of voters, will partly depend on the extent to which the region is making demonstrable progress on this Action Plan.

MTC should convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit. Another essential ingredient in the development of a funding plan that can deliver transit transformation will be inclusive and meaningful public engagement, particularly within underserved communities and with Bay Area residents most reliant upon public transit.

The members of the Blue Ribbon Transit Recovery Task Force call upon all parties represented at the Task Force and other interested stakeholders to embrace the recommendations of the Action Plan and to help bring them to fruition. If successful, the Bay Area's future transit riders and those who appreciate the critical role that it serves will look back on this effort as a historic turning point when the region set a new course towards a better, more unified transit system that puts the rider first.

## **Glossary of Terms**

*To be populated with relevant terms.*

DRAFT



## APPENDICES

- I. Transformation Action Plan Goals & Objectives**
- II. Transit Network Management Problem Statement**
- III. Priority Roles and Responsibilities for Network Management Alternatives Evaluation**
- IV. Initial Descriptions on Near-term Priority Roles and Responsibilities for Network Management Evaluation**
- V. Transit Recovery and Transformation: Research Overview and Results**

# APPENDIX I

## TRANSFORMATION ACTION PLAN GOALS & OBJECTIVES

ADOPTED NOVEMBER 16, 2020

### Transit Transformation Definition:

Design, adequately invest in and effectively manage a public transit network that is equitable, inclusive, frequent, affordable, accessible, and reliable; is integrated with unified service, fares, schedules, customer information and identity; and serves all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

### GOAL 1: Recognize Critical Recovery Challenges Facing Transit Agencies

*Defer post-recovery service planning to allow Bay Area transit agencies to prioritize difficult fiscal and service choices in the midst of increasing uncertainty.*

- A. Encourage timely additional MTC funding and regulatory relief during the Transit Recovery period.
- B. Advocate for timely additional federal and state funding to support Recovery.
- C. Receive quarterly Stage 2 updates from Operators and MTC.
- D. Support regional funds for inclusive rider research and return-to-transit communications.

### GOAL 2: Advance Equity

*Integrate and be accountable to equity in policy, service delivery and advocacy recommendations, as embodied in MTC's Equity Platform.*

- A. Develop specific Equity Principles to guide Transit Transformation planning.
- B. Include focused outreach to current riders, underserved populations, and persons with disabilities to inform the Transformation Action Plan.

### GOAL 3: Identify near-term actions to implement beneficial long-term Network Management & Governance reforms

*Develop business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation.*

- A. Develop a clear Problem Statement that addresses what issues or problems Network Management reforms seek to resolve.
- B. Using prior MTC analyses and qualified professionals, evaluate regionwide network management alternatives, addressing issues of legal authority, labor, scope of duties, oversight, and increased budget requirements and savings. Recommend near-term reform actions.
- C. Using MTC staff and qualified professionals, identify and support near-term consolidation opportunities focused in, but not limited to, smaller transit markets with multiple transit operators to provide a more connected service to the customer, where feasible.
- D. Propose state and regional policy and legislative actions to support transit transformation and expedite implementation of transit priority advantages on streets and highways.

# APPENDIX I – TRANSFORMATION ACTION PLAN GOALS & OBJECTIVES

## **GOAL 4: Establish how current MTC and state transit initiatives should integrate with Network Management & Governance reforms**

*Review the scope, timing, and decision process of current MTC and state transit initiatives and identify specific actions to integrate them with Management & Governance reforms.*

- A. Receive presentations on several current MTC transit initiatives and comment on their relationship to Management & Governance reforms.
- B. Receive state presentation on CalSTA initiatives that inform management and governance reform.

# APPENDIX II

## TRANSIT NETWORK MANAGEMENT PROBLEM STATEMENT

ADOPTED MARCH 22, 2021

### Context

By June 2021, the **Blue Ribbon Transit Recovery Task Force (BRTF)** is expected to submit a Transit Transformation Action Plan (Plan) that identifies actions needed to re-shape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area megaregion. In November 2020, the BRTF adopted four Plan goals, including Goal 3A, which states: *“Develop a clear Problem Statement that addresses what issues or problems Network Management reforms seek to resolve.”*

### Working toward this result is not a new idea.

- MTC's Resolution 3866 incorporates nearly 50 years of legislated transit coordination mandates, including administering fare revenue-sharing, governing inter-operator transfers, and deciding discretionary fund sources and amounts to achieve coordination and connectivity.
- In 2012, MTC adopted the Transit Sustainability Project, which identified specific goals and objectives related to ridership, customer-focus, and regional coordination.<sup>1</sup>
- In 2019-2020, FASTER, a multi-stakeholder effort, developed a strategy and funding plan to achieve more coordinated transit planning, effective project delivery, and more integrated fares and schedules.
- In 2019, Assemblymember Chiu introduced AB2057, state legislation that prioritized institutional reforms that would support a more seamless public transportation network, including ensuring core levels for transit-dependent populations.
- In 2021, MTC's Plan Bay Area 2050 Blueprint identified several beneficial transit program enhancements needed to create an expanded, fast, frequent, efficient, and safe multi-modal transportation system that includes efficient intercity trips complemented by a suite of local transportation options.

Despite these efforts, significant barriers to the BRTF's vision still exist and must be addressed in a region where physical geography, jurisdictional boundaries, urban settlement patterns and travel patterns overlap and intersect in complicated ways, while also considering how megaregional and interregional travel services will interface with the Bay Area system. Currently, the COVID-19 pandemic has created an acute, existential crisis for transit, with an average reduction in ridership of 77% by the end of 2020<sup>2</sup>, and it is unclear when, and to what extent, ridership will return.

<sup>1</sup> MTC – Transit Sustainability Project, May 2012

<sup>2</sup> Operator provided information; from BRTF meeting/ December 14, 2020

## APPENDIX II – TRANSIT NETWORK MANAGEMENT PROBLEM STATEMENT

Prior to the pandemic, UCLA completed a study for MTC<sup>3</sup> that determined that in 2017 and 2018, the Bay Area lost over 5% of its annual riders, despite a booming economy and service increases. The decline occurred even as most major operators increased service in terms of both mileage and hours of operation. The steepest ridership losses came on buses, at off-peak times, on weekends, in non-commute directions, on outlying lines, and on lines that did not serve the region's core employment clusters. It also cited ridesharing as a possible cause of declining transit ridership.

Transit also faces substantial financial challenges. Operating expenses are subject to intense inflationary pressures and capital construction costs have escalated precipitously over the past decades. Locally-generated sales or property taxes have restrictions limiting an agency's ability to serve areas outside their county and local return on services is critical to retain public support. In world-wide systems cited as comparison, there is significantly greater funding dedicated to public transit.

Some of the factors contributing to transit's ridership decline and equitable access cannot be solved by transit operators alone. Bay Area governments and the planning profession at large have played a central role in systematically denying opportunities to communities of color through practices like redlining, the clearance of neighborhoods for construction of urban highways, exclusionary zoning, redevelopment, policing bias and outright discrimination and segregation. Low gasoline prices also affect public transit ridership in the Bay Area.

If sustained, this decline in ridership threatens to plunge the region's transit system into a downward spiral, jeopardizing both the near- and long-term financial viability of individual transit operators, negatively impacting riders, and fundamentally undermining the value of the public's past and future investments in transit as a public good. In addition, the region's roadway system has insufficient capacity to absorb the traffic increase that would occur with the collapse of transit systems, creating greater travel delay and greenhouse gas emissions.

**Problem Statement Summary:** Public transit services in the San Francisco Bay Area are operated by 27 agencies, each with its own unique policies, procedures, and operating practices best suited for their immediate service areas and local priorities; and not organized to support customer-friendly, inter-agency travel. Strong collaborative action is needed to restore and grow transit ridership to reach the ambitious targets<sup>4</sup> associated with Plan Bay Area 2050's vision of a more affordable, connected, diverse, healthy, and vibrant Bay Area for all.

**The COVID-19 Pandemic** has dramatically reduced the ridership of the Bay Area's transit system – and it is unclear when, and to what extent, ridership will return. In the near-term, the pandemic has created an acute, existential crisis for transit, however this only underscores and deepens the pre-existing problem of declining demand for transit in the region as a whole. If sustained, this decline in ridership threatens to plunge the region's transit system into a downward spiral, jeopardizing both the near- and long-term financial viability of individual transit operators and negatively impacting riders.

<sup>3</sup> UCLA Institute of Transportation Studies, "What's Behind Recent Transit Ridership Trends in the Bay Area?" February 2020

<sup>4</sup> UCLA Institute of Transportation Studies, "What's Behind Recent Transit Ridership Trends in the Bay Area?" February 2020

# APPENDIX II – TRANSIT NETWORK MANAGEMENT PROBLEM STATEMENT

**Restoring and growing transit ridership** will require an ongoing multi-front effort that addresses the challenges that transit faces across multiple geographies and levels of government. Much of this work is and will be focused at the local and sub-regional level — where the vast majority of transit trips currently occur. As the pandemic subsides, however, there is also a significant opportunity at the regional scale to create a more efficient, coordinated and customer-friendly system that better serves existing riders and attracts new ones.

Below are key problems identified by the Ad Hoc Problem Statement Working Group.

## **Organizational/Institutional Challenges**

- There is a lack of transit priority on surface roads.<sup>5</sup> Transportation institutions and decision-making procedures are not developing and managing rights-of-way in a coordinated manner, both regionally and in many cases locally, to optimize transit speed, service investments and the region's efforts to grow transit mode share and reduce greenhouse gas emissions.
- Network management resources and authority are insufficient to ensure frequent, reliable service to key destinations across boundaries of multiple agencies, with efficient connections at multimodal hubs.
- Cooperation on coordinated approaches across multiple agencies is time-consuming and unpredictable.
- There is a need to improve local school access and inter-agency paratransit service in an effective and efficient manner.<sup>6</sup>
- A lack of unified, robust data collection and management impedes nimble, equivalent service planning and performance evaluation.

## **Customer Experience**

- Bus travel is slow and unreliable because of vehicles getting stuck in traffic, inefficient stop spacing and transfer facilities, and where schedules create long wait times.
- While being studied now, fares remain confusing, vary by agency, create penalties for using more than one operator, have inconsistent discount policies and are unaffordable for low-income riders.<sup>7</sup>
- While being studied now, a lack of unified services for trip planning, real-time information, mobile payment technologies and wayfinding maps and signage confuses existing riders and impedes opportunities to grow ridership.<sup>8</sup>
- Large operators' customers are expressing greater rider health and safety concerns.<sup>9</sup>

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5 MTC – Plan Bay Area 2050: A Blueprint for the Bay Area's Future, December 2020

6 MTC – Coordinated Public Transit–Human Services Transportation Plan Update, March 2018

7 MTC Fare Integration Task Force is currently developing a business case and phased implementation recommendation.

8 MTC – Bay Area Core Capacity Study, September 2017

9 BART, Caltrain Rider Surveys

# APPENDIX II – TRANSIT NETWORK MANAGEMENT PROBLEM STATEMENT

## **Past and Current Disparities**

- Failed regional housing and development policies have resulted in the displacement of low income and people of color to car-dependent communities, reducing full access to economic opportunities due to longer, less convenient, and more expensive mobility options.<sup>10</sup>
- There is no centralized plan to address the legacy of disenfranchisement and marginalization of these communities. Those most harmed by past and current exclusion are not centered throughout the development and implementation of future solutions.

## **Transit Costs and Funding**

- Bay Area transit agencies are not uniformly funded, creating disparate challenges among operators. Current and future service coordination efforts can only offer limited benefits without additional funding, which has not yet been identified.<sup>11</sup>
- The potential to raise additional needed revenues to advance the transit system and levels of service will be more difficult until an integrated, aligned and coordinated system is in place.
- Integrated local, state, and federal transit revenue strategies need to be developed in a regionally supported forum.
- Opportunities for administrative and operational efficiencies such as centralization of business functions and systems, unified data collection, procurement and delivery of capital investments varies greatly among transit operators depending on the type of service each provides.<sup>12</sup>
- Changing current funding levels or priorities cannot be done without understanding difficult tradeoffs.

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10 MTC – Plan Bay Area 2040 Equity Analysis, July 2017 / MTC – Plan Bay Area 2050 Equity and Performance Outcomes, December 2020

11 MTC – Transit Sustainability Project, May 2012

12 MTC – Transit Sustainability Project, May 2012

## APPENDIX III

# PRIORITY ROLES AND RESPONSIBILITIES FOR NETWORK MANAGEMENT ALTERNATIVES EVALUATION

ADOPTED WITH AMENDMENTS MAY 24, 2021

Network Management Outcomes	Roles & Responsibilities <sup>1</sup>
<b>FARES AND PAYMENT:</b> Simpler, consistent, and equitable fares and payment options attract more riders.	<ul style="list-style-type: none"><li>• Fare Integration Policy</li></ul>
<b>CUSTOMER INFORMATION:</b> Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	<ul style="list-style-type: none"><li>• Branding, Mapping and Wayfinding</li><li>• Marketing / Public Information</li><li>• Technology and Mobile Standards (Real Time Info)</li></ul>
<b>TRANSIT NETWORK:</b> Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	<ul style="list-style-type: none"><li>• Bus Transit Priority</li><li>• Connected Network Planning</li><li>• Station Hub Design Review</li><li>• Data Collection and Coordination</li><li>• Capital Project Prioritization</li><li>• Bus Network Management Reform</li><li>• Rail Network Management Reform</li></ul>
<b>ACCESSIBILITY:</b> Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.	<ul style="list-style-type: none"><li>• Accessible Services (including Paratransit)</li><li>• Centralized Program Eligibility Verification</li></ul>
<b>FUNDING:</b> The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.	<ul style="list-style-type: none"><li>• Funding Advocacy</li></ul>

<sup>1</sup> Mega-project Delivery and Oversight was modified by the Task Force to be a consideration but not a focus of the Network Management Alternatives Evaluation.

## APPENDIX IV

# INITIAL DESCRIPTIONS ON NEAR-TERM PRIORITY ROLES AND RESPONSIBILITIES FOR NETWORK MANAGEMENT EVALUATION

### REVISED TO REFLECT MAY 24, 2021 TASK FORCE ACTION

*To aid in the Blue Ribbon Transit Recovery Task Force's discussion of network management roles and responsibilities, initial descriptions of roles and responsibilities were drafted to clarify and guide feedback during prioritization. Additional definition of the roles and responsibilities will be developed during the business case assessment.*

#### Initial Near-Term Priority Roles and Responsibilities Definitions

Network Management Outcomes	Roles & Responsibilities	Description
<b>FARES AND PAYMENT:</b> Simpler, consistent, and equitable fares and payment options attract more riders.	<b>Fare Integration Policy</b>	Findings from the Fare Coordination and Integration Study will guide the implementation recommendations for regional fare integration, with an emphasis on increasing equity and transit ridership. Specific actions are to be determined.
<b>CUSTOMER INFORMATION:</b> Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	<b>Branding, Mapping, and Wayfinding</b>	Develop new regional standards and processes for creating and deploying new harmonized mapping, wayfinding, and branding products. Processes will streamline and expedite delivery for consistent, comprehensive information at a greatly increased number of transit access points throughout the region. The development of mapping, wayfinding, and branding standards builds on elements of MTC's current effort - the Hub Signage Program. Part of this effort overlays with the "Station Hub Design Review" area to facilitate passenger movements but could also make recommendations to improve physical footprint and transfer path of travel.

# APPENDIX IV

## Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
<p><i>(continued)</i></p> <p><b>CUSTOMER INFORMATION:</b> Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.</p>	<b>Technology and Mobile Standards</b>	Coordination and administration of data and technology Standards encompasses both scheduled and real time passenger information standards, implemented through core and extended GTFS and GTFS-Realtime standards. Coordination with state initiatives and neighboring regions can be done if relevant. Work elements may include support for creation of GTFS and GTFS-Realtime feeds for agencies that do not have them and ongoing technical assistance with data feeds such as testing, validation, and QA/QC.
	<b>Marketing/Public Information</b>	Regional collaboration on marketing campaign creation and promotion to ensure consistent messaging across all Bay Area transit operators. This may also include market research efforts that are conducted on a regular basis in order to establish regional comparative data.
<b>TRANSIT NETWORK:</b> Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	<b>Bus Transit Priority</b>	The focus of this work is on projects, programs and policies that enable buses to achieve travel time benefits over private automobiles and/or be protected from the effects of auto congestion. Specific items include dedicated transit lanes on major bridges, bridge approaches, and regional and local arterials; bus-on-shoulder; connections to intermodal transit stations; and buses on HOV/Express Lane facilities. Projects may be advanced on either Caltrans ROW and/or local city streets. This effort may also establish common standards for <i>(continued on next page)</i>

# APPENDIX IV

## Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
<p><i>(continued)</i></p> <p><b>TRANSIT NETWORK:</b>  <b>Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.</b></p>	<p><i>(continued)</i></p> <p><b>Bus Transit Priority</b></p>	<p><i>(continued)</i></p> <p>signal priority equipment and software. Additionally, an important element of this work includes addressing how to streamline approval and implementation of capital projects. Advancing CEQA Streamlining legislation (such as extending and broadening SB 288) would serve to remove project implementation barriers, particularly in relation to transit priority.</p>
	<p><b>Connected Network Planning</b></p>	<p>The structure of transit service delivery varies throughout the Bay Area and the pressures on local decision makers to be responsive to local transit demand make it difficult to coordinate a multi-agency view of how cross jurisdictional trips might be better served on a joint basis. The design of the existing Bay Area transit network could be improved with a focused multi-agency effort on regional and subregional service planning to deliver an effective transit system that can attract more riders and be more reliable, connected, and customer oriented. Elements of this work could include express bus network planning, identification of regional routes, gap identification for interjurisdictional trips, operating and capital connectivity improvements at intermodal hubs, and beyond.</p>

## APPENDIX IV

### Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
<p><i>(continued)</i></p> <p><b>TRANSIT NETWORK:</b>  <b>Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.</b></p>	<b>Station Hub Design Review</b>	Part of this effort overlays with the “Branding, Mapping and Wayfinding” area to facilitate passenger movements but could also make recommendations to improve physical footprint and transfer path of travel. Major capital projects and station access improvements must be informed by, coordinated with, and supported by the surrounding community. The intent is to plan and design hubs for ease of use and navigation so that wayfinding becomes more intuitive and effective and connected with the community.
	<b>Data Collection and Coordination</b>	Better define data standards, develop common data definitions, and enhance regional data clearinghouse efforts to better make data available to both the region and operators for local and regional network management and coordination.
	<b>Capital Project Prioritization</b>	Based on projects identified in the adopted Plan Bay Area 2050 Blueprint, assess, identify, and prioritize transit capital projects for funding and development.
	<b>Bus Network Management Reform</b>	Develop a transit network management business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation. Bus will be one component of the larger regional transit network analysis.

## APPENDIX IV

### Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
<p><i>(continued)</i></p> <p><b>TRANSIT NETWORK:</b> Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.</p>	<p><b>Rail Network Management Reform</b></p>	<p>Develop a transit network management business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation. Rail will be one component of the larger regional transit network analysis. Through a Caltrans Sustainable Communities Grant, MTC may develop a rail focused analysis that would feed into the Transit Network Management business case assessment.</p>
<p><b>ACCESSIBILITY:</b> Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.</p>	<p><b>Accessible Services (including Paratransit)</b></p>	<p>Reduce barriers between different types of services for older adults and persons with disabilities, including both fixed-route and paratransit services. Special consideration should be given to service and public transit infrastructure around destinations frequented by passengers with accessibility needs. Pilot projects should be explored at the regional and subregional levels to determine functional best practices and ensure program designs are sustainable.</p>
	<p><b>Centralized Program Eligibility Verification</b></p>	<p>Cost effectively determining eligibility for ADA paratransit service, age/income based programs, and other eligibility-based policies through a centralized regional provider. Once verified by the central provider, operators need to be able to confirm individual program eligibility and conditions/restrictions without additional effort from the passenger.</p>

# APPENDIX IV

## Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
<b>FUNDING:</b> The Bay Area’s transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.	<b>Funding Advocacy</b>	Secure existing and new revenue to assist in the advancement of transit initiatives, the sustainability of transit, and implementation of recommendations from the Blue Ribbon Transit Recovery Task Force.

# APPENDIX V



## Blue Ribbon Task Force Transit Recovery & Transformation: Research Overview & Results

EMC Research, Bay Area Council, & MTC Staff  
May 27, 2021

### Return to Transit Campaign Update

- ▶ MTC and transit operator marketing staff are developing a Return to Transit Communication Campaign that will include print, digital, social media and audio advertising.
- ▶ Craft + Commerce, MTC's marketing contractor, developed five campaign concepts that were narrowed down to three.
- ▶ EMC Research is message testing the three concepts; Imprenta Communications, an ethnic communications firm, is testing the concepts in Spanish, Chinese, Vietnamese and Tagalog.
- ▶ Testing will be completed in early June. The three campaigns will be narrowed down to one.
- ▶ Campaign will be built out by early July and promoted in summer or fall.

21-8062 MTC BRTF Transit Recovery & Transformation | 2

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Blue Ribbon Research Overview

- ▶ Since mid-2020, EMC Research and Bay Area Council have been providing public opinion and employer research support
- ▶ Research efforts have included:
  - Two reviews of prior opinion research conducted in the Bay Area
  - Two rounds of community focus groups (most recent round in April, in English, Spanish, Cantonese, and with persons with disabilities)
  - Statistically valid random sample poll of 1,000 Bay Area residents (mid-April)
  - Employer focus groups and monthly return to workplace tracking surveys (April - September)
- ▶ Bay Area Resident Poll & Community Focus Groups designed to:
  - Understand transit perceptions and expectations for the future
  - Measure interest in more integrated Bay Area public transit & Seamless bill
  - Gauge reaction to issues addressed by network management

*As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.*

*Please note that due to rounding, percentages may not add up to exactly 100%.*

21-8062 MTC BRTF Transit Recovery & Transformation | 3

## Summary of Research Findings



- ▶ Bay Area residents, both transit riders and not, were not satisfied with public transit prior to the pandemic, and **they demand better and encourage that now is the time to act.** Reliability, frequency, ease of use, and personal safety on board are all viewed as inadequate.
- ▶ Most Bay Area residents (87%) believe public transit is important to the Bay Area. **Reliable, frequent, and safe transit for the Bay Area** is a priority for nearly everyone, whether they ride or not.
- ▶ Coordinated public transit that operates as a **seamless, multimodal transit system** for the Bay Area is overwhelmingly popular (89% support). Support is high across riders and non-riders, and all regions of the Bay Area.
- ▶ Bay Area residents all want the same things, including **real-time information**, better transit for **dependent populations**, more **direct service** with fewer transfers, a single **mobile app**, uniform **maps and signage**, a single **set of fares, passes, and discounts**, and a **regional network** that can set fares, align schedules, and standardize information.

21-8062 MTC BRTF Transit Recovery & Transformation | 4

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS



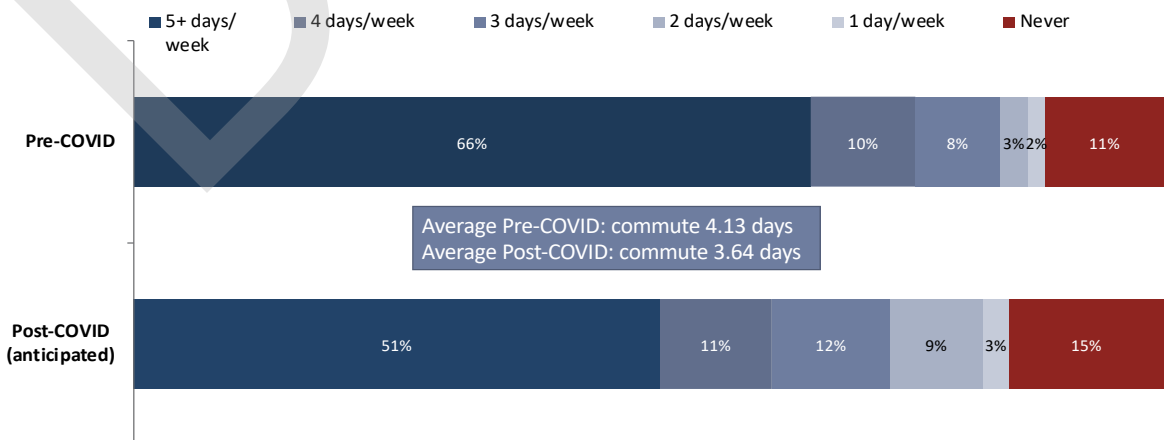
## Commute Frequency & Transit Use

### Commute Frequency (all modes)



Commuters anticipate heading to the workplace fewer days a week than they did prior to the pandemic.

(Among employed/students only – 69% of residents)



Q50, Q51 & Q52. [Before the pandemic/right now/after the COVID-19 pandemic ends] how many days per week [did/do/you anticipate that you will] commute or go into a workplace?

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

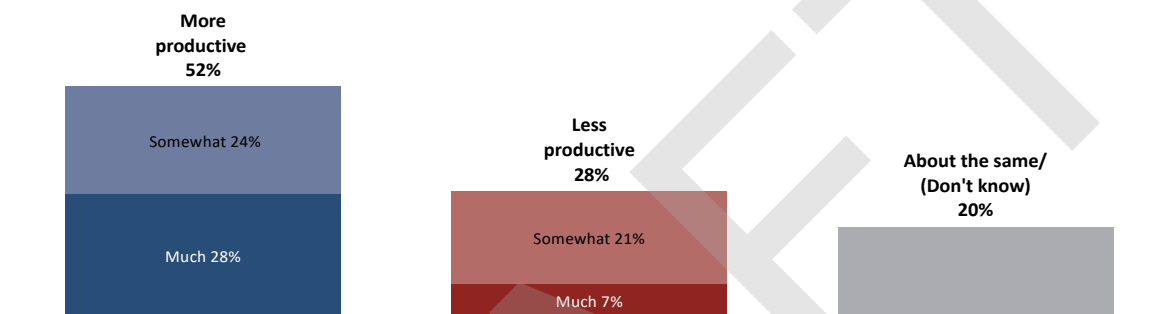
## Work from Home



*There is evidence that employees are not particularly unhappy in their work at home environment.*

### How would you rate your productivity working at home?\*

*Among employed working from home always or sometimes; n=430*



\* Question from Bay Area Council Bay Area Poll – March 2021

21-8062 MTC BRTF Transit Recovery & Transformation | 7

## Employer Return to Office



Employers surveyed are anticipating their employees will generally spend fewer days in the office post-COVID than they did prior.

Most employers anticipate beginning to bring non-essential employees back to offices in late summer/early fall. A majority think their “new normal” will be in place by mid-fall, while about a third felt it might be closer to the end of the year, or even early 2022.

Most employers surveyed support the use of public transit as a way for their employees to commute to the workplace.

In addition to COVID safety concerns, employers want improved efficiencies in the transit system such as improved reliability, more service, and reduced wait times.

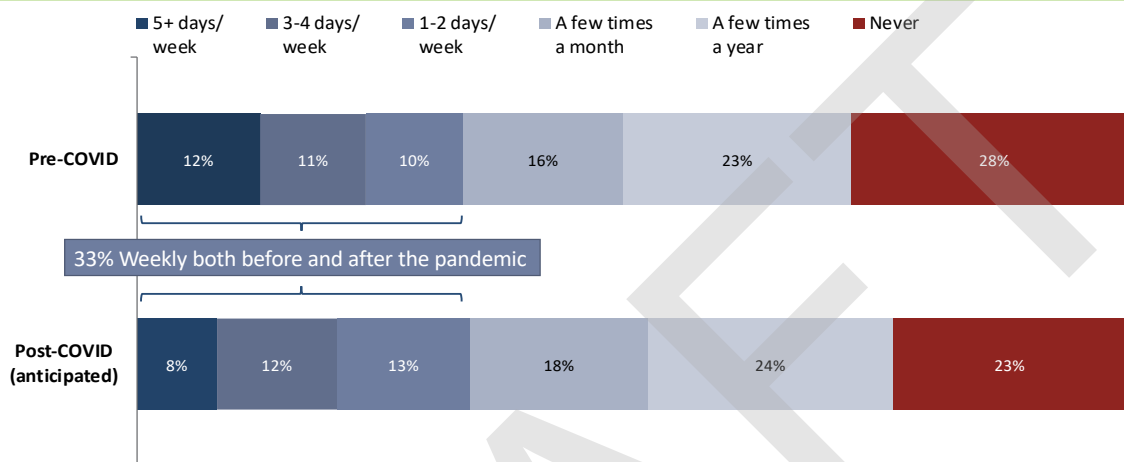
21-8062 MTC BRTF Transit Recovery & Transformation | 8

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Transit Usage



*The one-third of Bay Area residents that were regular transit riders before COVID anticipate returning, although maybe with less frequency.*



Q45, Q47 & Q48. [Before the COVID-19 pandemic/currently/after the COVID-19 pandemic ends] how many days per week [did/do/do you think you will] take public transit?

21-8062 MTC BRTF Transit Recovery & Transformation | 9

## Focus Groups: Transit & Commuting



*Focus group participants generally felt they would return to transit when they went back to their regular activities.*

"I imagine that there will be some sort of hybrid where I would need to go back and be in person. But I don't imagine that it would be every day. I think it would probably be like twice a week or maybe three times."

-- Pre-pandemic transit rider

"Once I feel that everything is safe, I will be going back to using the Caltrain, not as often, just because our workplace has expressed the idea of maybe doing **part-time remote** and then **part-time in the office**."

-- Pre-pandemic transit rider

"I haven't taken BART since March (2020), but I **have every intention**, post vaccine rollout, post normalcy **to return to taking BART**."

-- Pre-pandemic transit rider

"I would love to be able to go to a Giants game, go to the museums, go to the concerts and the things that I used to go to with other people. That's just what I'm waiting for, **venues and things like that to open up again**."

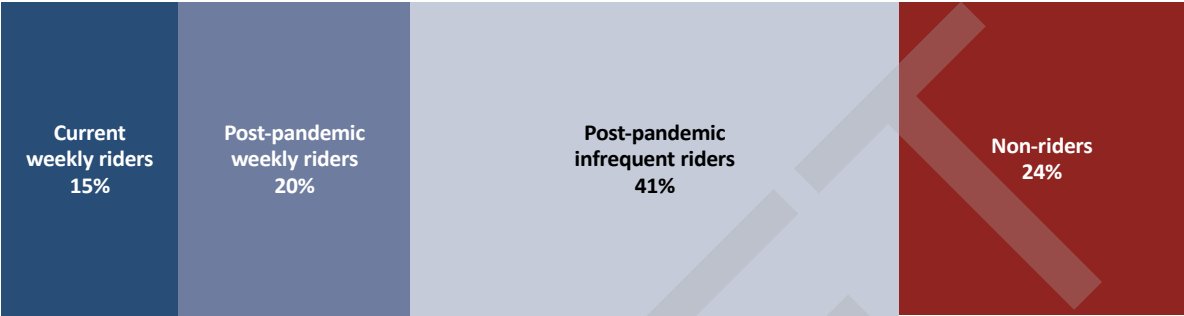
-- Pre-pandemic transit rider



21-8062 MTC BRTF Transit Recovery & Transformation | 10

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Transit Usage Groupings



**Current Weekly Riders:** Currently taking transit at least once a week  
**Post-pandemic Weekly Riders:** Anticipate taking transit **at least** once a week post-pandemic  
**Post-pandemic Infrequent Riders:** Anticipate taking transit **less than** once a week post-pandemic (but more than never)  
**Non-Riders:** Do not anticipate taking transit at all post-pandemic

Segmentation created from questions 47-48. 21-8062 MTC BRTF Transit Recovery & Transformation | 11



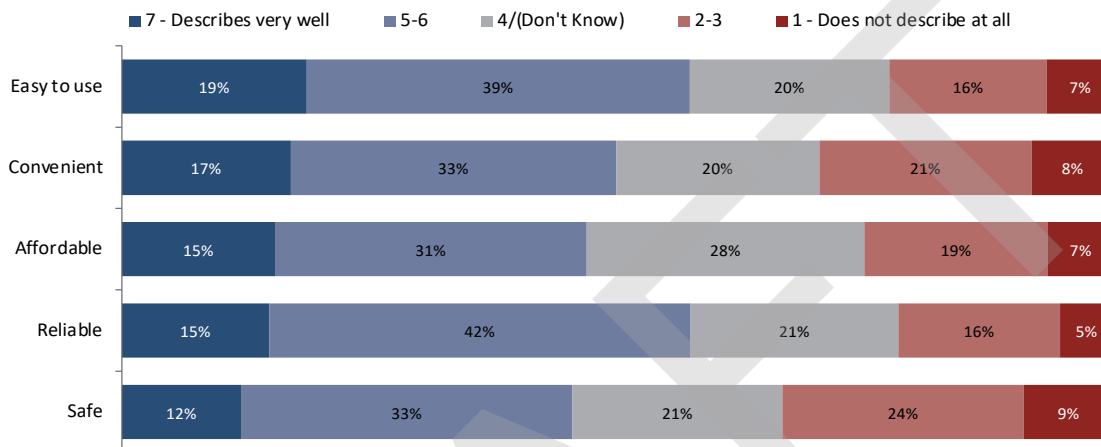
## Transit Perceptions

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Pre-COVID Transit Perceptions



Bay Area residents were not particularly positive about transit before the pandemic.



Q5-Q9. How well does each of the following describe public transit in the Bay Area before the pandemic?

21-8062 MTC BRTF Transit Recovery & Transformation | 13

## Focus Groups: Transit Perceptions



Riders in the focus groups had a range of concerns about public transit in the Bay Area.

**"It would be safer if it was on time.** Transit is not on time. You just wait on the street, wait for the bus before you get on. Someone already robbed you."

-- CBO focus group participant (Cantonese language group)

"BART is nasty and grimy, anyway. So it's like, **if you can survive a BART train, you'll survive COVID.**"

-- Pre-pandemic transit rider



**"Paying all the different prices and figuring out every different schedule is kind of a lot** for someone who is solely uses public transportation."

-- CBO focus group participant (English language group)

**"If I miss my ferry I don't want to have to pay extra cash to jump on another mode of transportation."**

-- CBO focus group participant (English language group)

**"The rate of the AC transit kept going up year by year, even though I'm a senior and I'm on a fixed income. So the increase in that and the increase in BART fares also deeply affected me. It is becoming more difficult to be able to afford transit."**

-- CBO focus group participant (English language group)

21-8062 MTC BRTF Transit Recovery & Transformation | 14

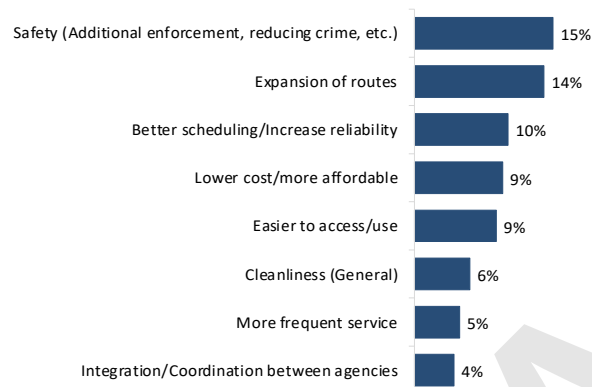
# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Future Transit Improvements: Top Responses



Nearly all Bay Area residents could name something they would like improved about Bay Area transit, with safety, convenience, reliability and affordability mentioned frequently.

What specific improvements to public transit in the Bay Area do you think we should make today that future generations will thank us for tomorrow?



Only 16% of residents were unable to offer a suggestion on how to improve public transit in the Bay Area

Q15.

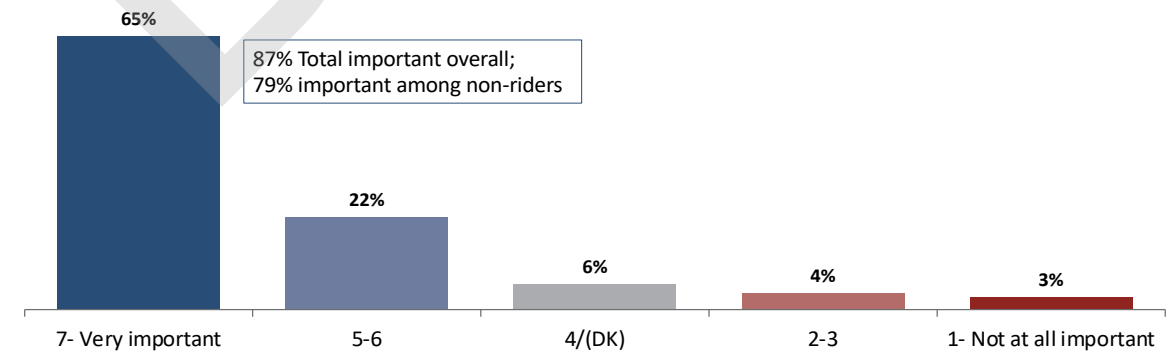
21-8062 MTC BRTF Transit Recovery & Transformation | 15

## Importance of Transit to the Bay Area



Public transit is seen as important for the Bay Area by nearly everyone, including those who don't ride transit.

Overall, how important is public transit for the Bay Area?



Q4.

21-8062 MTC BRTF Transit Recovery & Transformation | 16

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Focus Groups: Importance of Transit



Focus group participants talked about the importance of transit both to their own lives but also to the entire area. The connection of better transit to the environment was a common theme as well.

"We need to have a **multimodal system that services the entire region**, we need to have paratransit, we need to have rail, we need to have buses, we need to have shuttles...we need to have all kinds of modes of travel and we need to have service that goes where people need to use the service, we need reliable service, we need frequent service."

-- CBO focus group participant (Persons with disabilities group)



"Now, gas is very expensive. Also, people don't drive. And when it comes environmental protection, less driving is less emission, it's better for air quality. We're all getting old. **We need public transit.** That's part of our daily living."

-- CBO focus group participant (Cantonese language group)

"So we get people back on public transit, rather on cars and stuff that **it would be healthier for us, it's healthy for our children and our future**, and it would be more convenient as well."

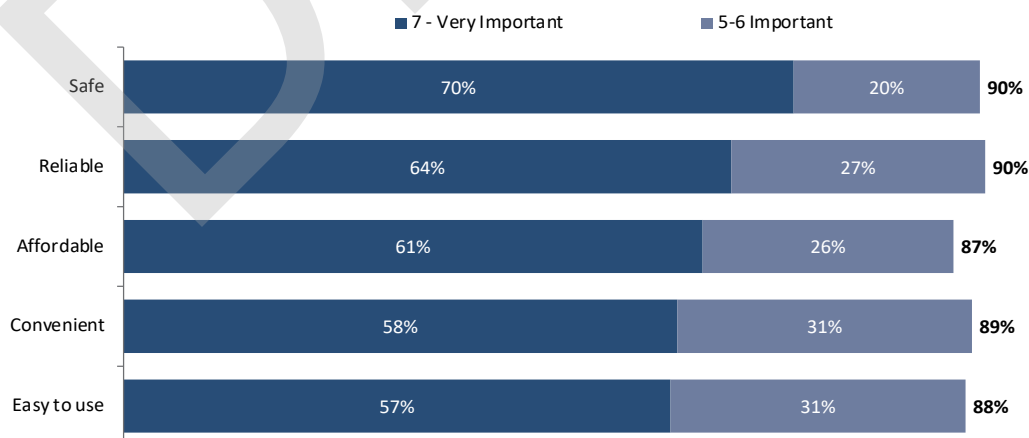
-- CBO focus group participant (English language group)

21-8062 MTC BRTF Transit Recovery & Transformation | 17

## Post-COVID Transit Importance



Bay Area residents place a high value on public transit system that is easy to use, convenient, affordable, reliable, and safe.



Q10-Q14. Now think about the future of public transit following the COVID-19 pandemic. For each of the following, please tell me how important they are to the future of the Bay Area's public transit system.

21-8062 MTC BRTF Transit Recovery & Transformation | 18

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS



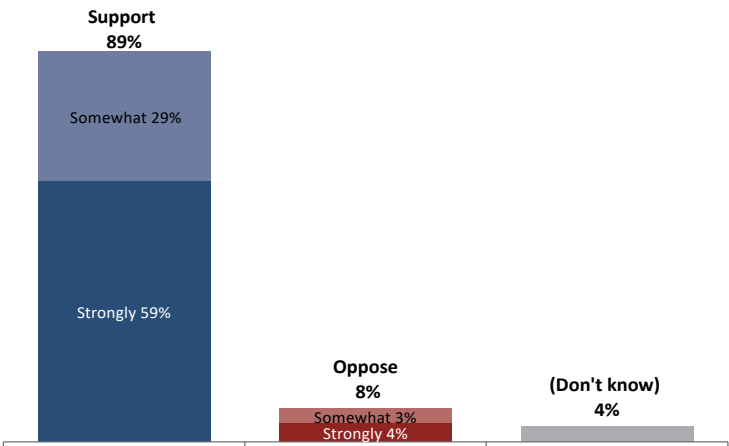
## Bay Area Seamless and Resilient Transit Act

### Support for Seamless Concept



Support for the idea of better coordinated seamless transit for the Bay Area is nearly universal.

A bill has been introduced in the state legislature called the **Bay Area Seamless and Resilient Transit Act**. This bill would coordinate all of the public transit systems in the Bay Area to operate as one seamless, multimodal transit system, including consistent mapping and signage to make transit easier to navigate, regional fares so riders pay one fare for their entire trip even if they have to transfer, and real-time vehicle location data so riders know when a bus, train, or ferry will arrive.



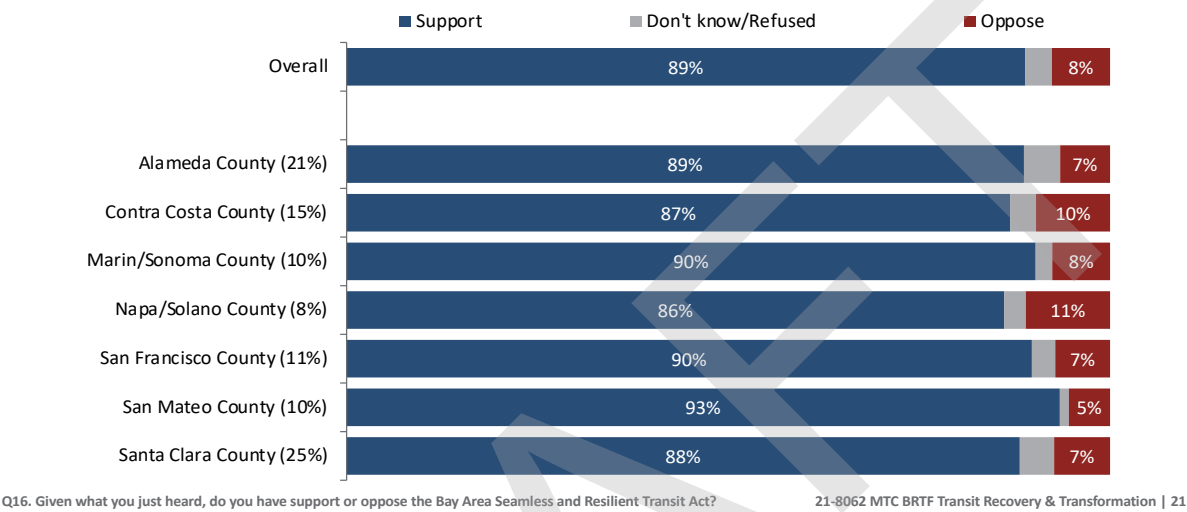
Q16. Given what you just heard, do you have support or oppose the Bay Area Seamless and Resilient Transit Act?

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Support by Region



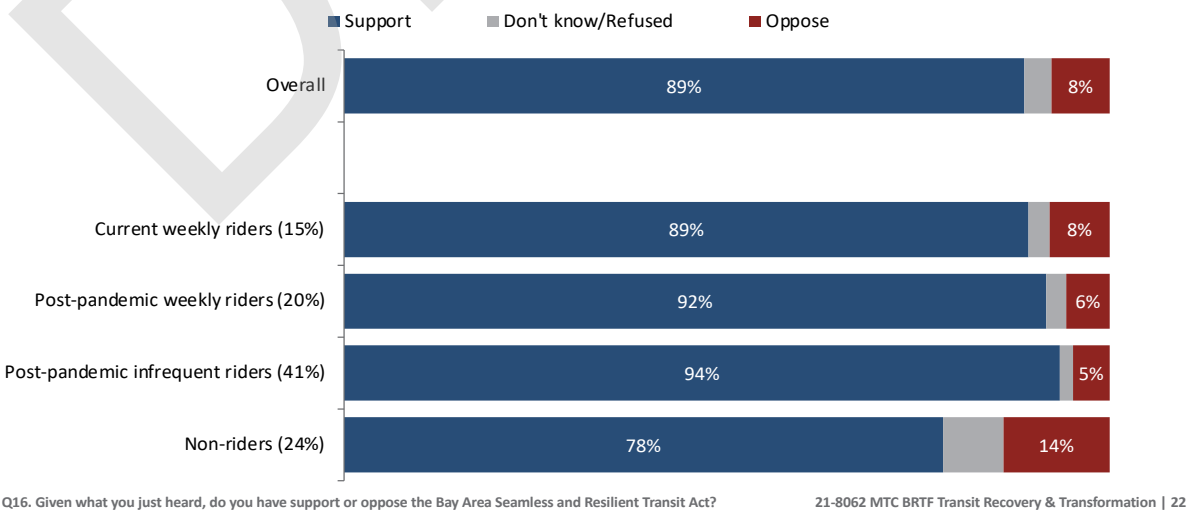
*The idea is supported across the entire Bay Area.*



## Support by Transit Ridership



*Current transit riders, future transit riders, and non riders all support the idea by wide margins.*



# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Focus Groups: Support for Integrated System



Focus group participants groups felt a more integrated system would help them get where they are going more easily, comfortably, and quickly.



"When you say integrated, it sounds like if a lot of the agencies kind of work together to make sure that their riders are happy and that they're comfortable and that they're safe...they're doing a service for the Bay Area, so **they should all kind of be on the same page.**"

-- CBO focus group participant (English language group)

"I think if there was an integrated system, **more people would use it.**"

-- CBO focus group participant  
(Spanish language group)

"VTA has a totally different system than BART. And then...San Mateo has a different system and they're all...taking people to work in San Francisco so **they should be synchronized.**"

-- CBO focus group participant (English language group)

"I think that it would be good if they were to **make connections in different locations and connect them all** so that people who take them, it'll be more accessible for them. That way they can know all of the options...and they would know how to...transfer from the bus to the train and get to the place where they have to go.

-- CBO focus group participant (Spanish language group)

21-8062 MTC BRTF Transit Recovery & Transformation | 23

## Elements of Seamless



### Bay Area residents all want the same things:

- ▶ 92% find real-time information on wait times and vehicle locations important
- ▶ 91% - 93% find better transit for dependent populations important
- ▶ 91% find more direct service, fewer transfers, and shorter wait times important
- ▶ 88% find a regional network that can set fares, align routes and schedules, and standardize information important



21-8062 MTC BRTF Transit Recovery & Transformation | 24

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Elements of Seamless



### Bay Area residents all want the same things:

- ▶ 92% find easy to use and uniform maps and signage important
- ▶ 90% find a single mobile app for planning, schedules, and information important
- ▶ 89% find a single set of fares, passes, discounts, and transfer policies important
- ▶ 80% find dedicated travel lanes along key transit routes for buses and carpools important



21-8062 MTC BRTF Transit Recovery & Transformation | 25

## Focus Groups: Elements



Focus group participants were particularly enthusiastic about fare, schedule, and information coordination.



"I would love to see all the systems working with each other, I would love to see **fares working with each other** so that it's not a major mess to try to go on nine different systems with nine different fares."

-- CBO focus group participants (Persons with disabilities group)

"Let people know what direction buses and transit is going and **how long it would take** for those systems to arrive at that point and **how frequently it will get to you.**"

-- CBO focus group participants (English language group)

When asked if they liked the idea of **paying just one fare** to get to their destination even if they took multiple modes:

"That sounds like a dream come true"  
"That would be excellent"  
"Tell us when that's going to happen"

-- CBO focus group participants (Spanish language group)

"I'm thinking, if I could get to that job with only one bus or maybe one transfer in under two hours that would be nice. But if I have two, three different ones, and **if it takes me anything over an hour, it's a lost cause. Forget it.**"

-- Pre-pandemic transit rider

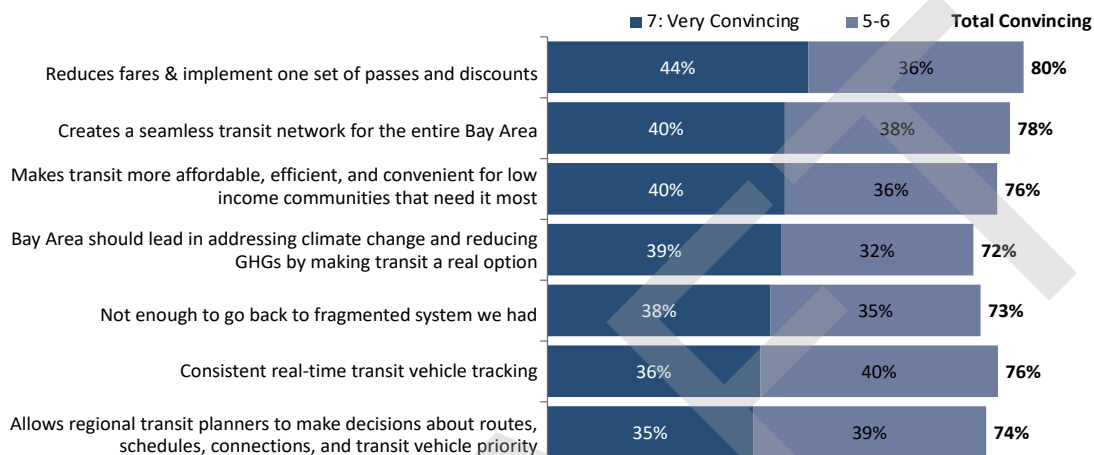
21-8062 MTC BRTF Transit Recovery & Transformation | 26

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Impact of Additional Information



*Outcomes of the proposal are compelling.*



*\* Wording of questions condensed for presentation purposes: full statements available in topline report.*

Q30-36. How convincing is each statement is to you as a reason to support the Bay Area Seamless and Resilient Transit Act?

21-8062 MTC BRTF Transit Recovery & Transformation | 27

## Focus Groups: Elements



*Focus group participants were particularly enthusiastic about fare, schedule, and information coordination.*



"I would love to see all the systems working with each other, I would love to see **fares working with each other** so that it's not a major mess to try to go on nine different systems with nine different fares."

-- CBO focus group participants (Persons with disabilities group)

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-- Pre-pandemic transit rider

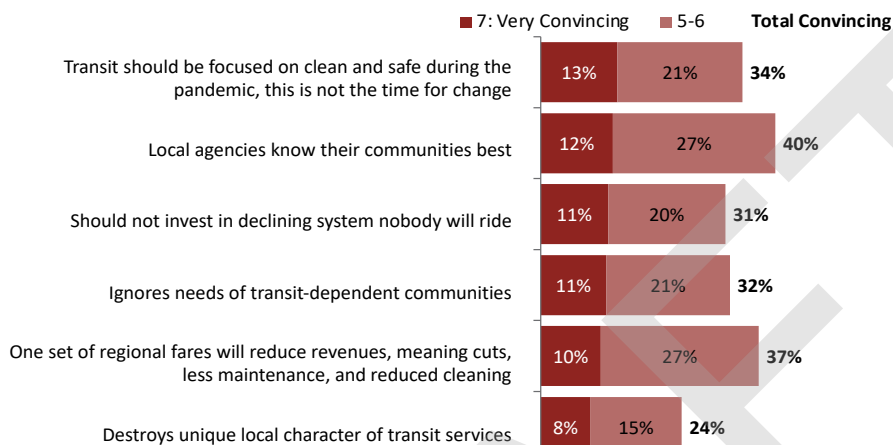
21-8062 MTC BRTF Transit Recovery & Transformation | 26

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Impact of Counter Information



Information against the idea of integrated regional transit has limited impact.



\* Wording of questions condensed for presentation purposes: full statements available in topline report.

Q38-43. How convincing is each statement is to you as a reason to oppose the Bay Area Seamless and Resilient Transit Act?

21-8062 MTC BRTF Transit Recovery & Transformation | 29

## Focus Groups: Concerns



There were some concerns from focus group participants about implementation and unintended consequences.



"Negative things will be people, they go short distance, they have to **pay more, be more expensive.**"

-- CBO focus group participants (Cantonese language group)

"Transit agencies have a habit of only caring about the choice riders. I think **transit dependent riders should be front and center.**"

-- CBO focus group participants (Persons with disabilities group)

"What I'm afraid that might happen is if this network integration happens, **we better not make some bad precedent** or do something wrong, that has something really crappy baked into it, that is really hard to get out."

-- CBO focus group participants (Persons with disabilities group)

"You can look the old BART (online) platform. It basically just was an app, but it just pulled up the old school web page, so **it didn't really actually provide any real specifically helpful things.**"

-- CBO focus group participants (English language group)

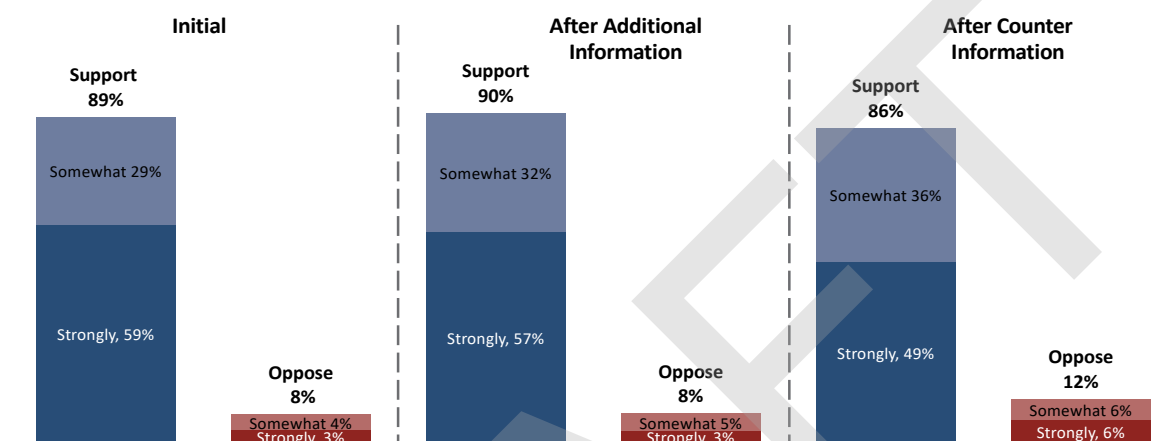
21-8062 MTC BRTF Transit Recovery & Transformation | 30

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

## Seamless Support Progression



*Additional information about the issue does little to impact support for the idea.*



21-8062 MTC BRTF Transit Recovery & Transformation | 31

## Conclusions



- ▶ Transit riders in the Bay Area do anticipate returning to transit
- ▶ Return to normal may take months, and many anticipate reducing their number of days in the office
- ▶ Residents, including non-transit users, place a high value on a quality public transit system
- ▶ There is near universal desire to see significant improvements in public transit including around fare structures, frequency, connectivity, and availability of information
- ▶ Transit-dependent residents are especially eager to see changes

21-8062 MTC BRTF Transit Recovery & Transformation | 32

# APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS



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202.849.6525

# Metropolitan Transportation Commission

## Legislation Details (With Text)

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**File #:** 21-0974      **Version:** 1      **Name:**

**Type:** Report      **Status:** Informational

**File created:** 7/8/2021      **In control:** Blue Ribbon Transit Recovery Task Force

**On agenda:** 7/26/2021      **Final action:**

**Title:** Transit Agency Ridership Updates

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 07 Transit Agency Ridership Updates July 2021](#)  
[Item 07 Return to Transit Communications Toolkit](#)  
[Comment Letter TransForm](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Transit Agency Ridership Updates

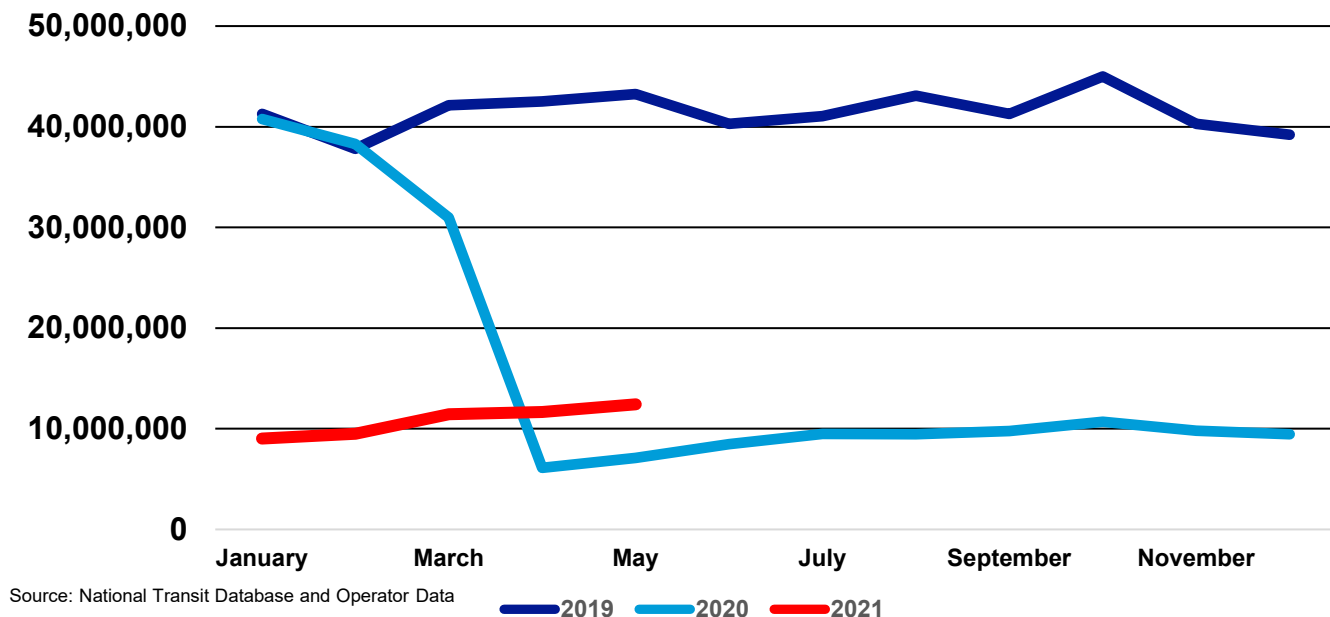
**Attachments:**

July 26, 2021

## Bay Area Transit Ridership (all operators)

### May Ridership Down 71% from Pre-COVID-19 Levels

Ridership remains depressed from a 2019 average of over 40 million trips per month, to 12 million trips in May 2021.



## Ridership and Service Impacts for Big 7 Operators

Data for May 2021 (vs. May 2019)

### SFMTA

**Ridership: -66%**

*Muni Metro service slowly being restored.*

### BART

**Ridership: -85%**

*Service ends at 9:00 pm.*

### AC Transit

**Ridership: -61%**

*Most Transbay service suspended.*

### VTA

**Ridership: -65%**

*Operating reduced service.*

### SamTrans

**Ridership: -56%**

*Operating modified schedule.*

### Golden Gate

**Ridership: -85%**

*2/3 of routes suspended.*

### Caltrain

**Ridership: -91%**

*Operating modified schedule.*

Source: National Transit Database and Operator Data

BLUE RIBBON



## TRANSIT RECOVERY TASK FORCE

TO: Blue Ribbon Transit Recovery Task Force Members

DATE: July 26, 2021

FR: Ursula Vogler, MTC

RE: Return to Transit Communications Toolkit

The All Aboard Bay Area Transit campaign focuses on getting the Bay Area public back on transit beginning August 9<sup>th</sup>, the campaign's launch date. Developed over the past four months by Craft + Commerce and in partnership with the Bay Area's 27 transit agencies, EMC Research, the Bay Area Council and MTC, the campaign will run through the end of September. It will be promoted in English, Spanish, Chinese, Vietnamese and Tagalog, and it will include paid social media, radio, publications and out of home advertising. MTC will be contributing over \$200,000 to the radio, publications and social media elements of the campaign; the operators will be personalizing the assets to produce their own social media promotion and out of home marketing.

The campaign's website is [allaboardbayarea.com](http://allaboardbayarea.com).

Attached is the campaign's toolkit that was delivered to the transit operators. If you have any questions about the campaign, please contact Ursula Vogler at [uvogler@bayareametro.gov](mailto:uvogler@bayareametro.gov).



BAY AREA TRANSIT OPERATORS

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# **Return to Transit Communications Toolkit**

## About This Guide

With the state fully reopening, large events beginning and employers signaling a return to office, the region's transit agencies seek to accelerate the return to transit with a unified, high impact communications campaign across the Bay Area.

The following guide provides a suite of assets to be deployed through the regional transit agencies' owned and paid communications channels to bring our campaign to life and drive impact at scale.



# What's Inside

In the following document, you will find assets for an array of communications channels including out of home, digital display, and social media.

Production-ready and modifiable Adobe Illustrator assets have been provided along with copy for the major social networks.

Depending on the channel, assets have been developed in English, Spanish, Chinese, Vietnamese and Tagalog.



# Requesting Assistance

- Assets have been developed based on requests from regional agencies. If you're not finding what you need, reach out and we'll do our best to help! For general asset requests or questions contact [Ursula Vogler](#) at MTC.
- For those running social media campaigns, we've included guidance on the preferred optimization strategy. For those who need assistance or have questions contact [Jacob Lepiarz](#) at Craft & Commerce.

# Campaign Branding



# Campaign Concept

Our core campaign concept is *All Aboard Bay Area Transit; Moving Forward Together.*

The goal of the concept is to reflect both the diversity of the region and the unified message being delivered across the region's transit agencies.



## CAMPAIGN BRANDING

# Photography

A full suite of retouched photos for the campaign can be [found here](#).

If you're not finding photos to meet your needs, reach out to [Jacob Lepiarz](#) and we'll explore our broader photo set.



# Campaign Assets



# Out of Home

We have provided assets in eight different out of home sizes based on requests from the regional operator working group.

Languages for out of home assets include English, Spanish, Chinese and Vietnamese.

All production files have been provided, with a space for regional operators to drop in their respective logos.

For production questions or support contact [Jacob Lepiarz](#) at Craft & Commerce.

## OOH Assets

[English OOH Ads](#)

[Spanish OOH Ads](#)

[Chinese OOH Ads\\*](#)

[Vietnamese OOH Ads\\*](#)

*\* **NOTE:** As of 07.23 Chinese and Vietnamese ads are still in production but will be delivered via linked folders.*

## OOH Asset Types

King	30" H x 144" W	56 ppi
Queen	30" H x 86" W	56 ppi
Tail	19" H x 70" W	56 ppi
Shelter	68" H x 47.25" W	150 ppi
In Bus Ad Rail	11" H x 17" W	150 ppi
Display Panel	17" H x 11" W	150 ppi
Ad Card	11" H x 28" W	150 ppi
Banner	48" H x 96" W	56 ppi

# Social Media

We have provided visual assets and social copy for Facebook, Instagram, Twitter and Nextdoor and visual assets in square and rectangular dimensions for use across platforms in English, Spanish, Chinese, Vietnamese and Tagalog.

For those running Facebook paid campaigns, we have also provided [this document with guidance on our recommended approach to a reach optimized campaign](#).

We've attempted to provide assets that can work for any operator across the region, but if you're not finding what you need or have questions about running reach optimized social campaigns contact [Jacob Lepiarz](#) at Craft & Commerce.

## Social Copy

[Paid Social Copy](#)

[Organic Social Copy](#)

## Visual Assets

[English](#)

[Spanish](#)

[Chinese](#)\*

[Vietnamese](#)\*

[Tagalog](#)\*

[Unbranded photos](#)

*\* **NOTE:** As of 07.23 Chinese, Vietnamese, Tagalog and animated ads are still in production but will be delivered via linked folders.*

# Display Ads

For those running display campaigns we've provided editable files in English and Spanish with space for operators to drop in their logos.

We've attempted to provide assets that can work for any operator across the region. If you're not finding what you need, require production support or have other questions contact [Jacob Lepiarz](#) at Craft & Commerce.

## Display Assets

[English Display Ads](#)

[Spanish Display Ads](#)

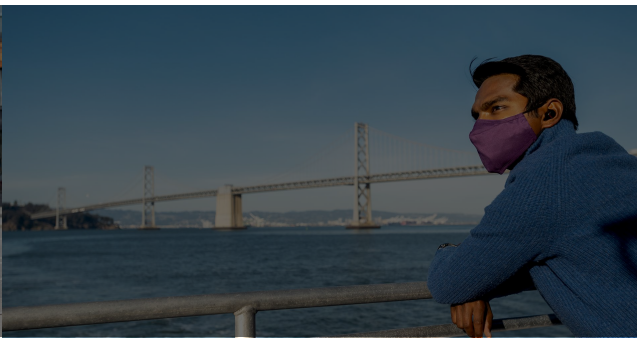
## Display Dimensions

Medium Rectangle	300 x 250 px
Leaderboard	728 x 90 px
Wide Skyscraper	160 x 600 px
Large Rectangle	300 x 600 px
Mobile Leaderboard	320 x 50 px
Billboard	970 x 250 px



THANK YOU.

---





Date: July 8, 2021

Attn: Jim Spering, Chair, Blue Ribbon Transit Recovery Task Force

Re: Transformation Action Plan Draft Actions

Dear Blue Ribbon Transit Recovery Task Force Chair Spering:

I am writing to commend the impressive work that the Blue Ribbon Transit Recovery Task Force has been able to accomplish in the last year. I am excited to see the impactful outcomes identified by the Task Force, and the clear ambitious actions proposed to accomplish them

Regarding the Network Manager Business Case, TransForm supports the evaluation of all four proposed concepts. The more information we have, the better we can make a decision as a region that best supports our agreed upon outcomes, and improve mobility justice in the region. I support an achievable, actionable path forward that will best serve low income people, people of color, and people with disabilities. In particular, key evaluation criteria must include whether the network manager is able to make progress on key equity metrics. For example, a network manager should improve outcomes for people of color, low income people, and people with disabilities by:

- Increasing regional economic growth and development;
- Reducing household transportation costs and travel time;
- Reducing greenhouse gas emissions and vehicle miles traveled;
- Increased availability and knowledge of alternatives to driving.

Regarding the specific draft actions identified for the Transformation Action Plan, I am supportive of the direction the Task Force has proposed. In particular, I support:

- Removing barriers to transit priority implementation, expediting travel time improvements on arterials and bus rights-of-way, and selecting HOV operating policies that prioritize an express bus network;
- Acting on the recommendations of the Fare Coordination and Integration Study recommendations, especially selecting and funding pilot projects that increase access to transit for low income riders, and increase ridership on the system overall as transit recovers;
- Improvements to paratransit that support the mobility needs of people with disabilities.

In addition, I support the stated intention to pursue more funding to build a robust transit network in the Bay Area. However, a large-scale funding ballot measure will require a robust public process, which I hope MTC will initiate by January 2022, in order to be ready for a 2024 ballot

campaign. TransForm supports MTC as a key player in bringing stakeholders together to develop an expenditure plan for a regional transportation funding measure. We must build an outcomes-oriented measure that can clearly provide measurable benefits to communities of color, while fairly distributing the financial burden.

I look forward to our continued participation in the bold and transformative work that the Task Force has taken on.

Darnell Grisby  
Executive Director  
TransForm