Metropolitan Transportation Commission

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

Meeting Agenda

Policy Advisory Council

Randi Kinman, Chair
Cynthia L. Murray, Vice Chair

Wednesday, September 8, 2021	1:30 PM	Board Room - 1st Floor (REMOTE)

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 Policy Advisory Council members who will participate in the meeting from individual remote locations. A Zoom panelist link for meeting participants will be sent separately to Policy Advisory Council 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. Council 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/81859423673
iPhone One-Tap: US: +16699006833,,81859423673# or +14086380968,,81859423673#
Join by Telephone Dial (for higher quality, dial a number based on your current location) US: +1 669 900 6833 or +1 408 638 0968 or +1 346 248 7799 or +1 253 215 8782 or +1 646 876 9923 or +1 301 715 8592 or +1 312 626 6799 or 888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)
Webinar ID: 818 5942 3673
International numbers available: https://bayareametro.zoom.us/u/khIvqrMCC
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 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.

The Policy Advisory Council advises the Metropolitan Transportation Commission on transportation policies in the San Francisco Bay Area, incorporating diverse perspectives relating to the environment, the economy, and social equity.

1. Welcome

Randi Kinman, Council Chair

2. Roll Call / Confirm Quorum

Quorum: A quorum of this council shall be a majority of its regular voting members (12).

3.   [21-0975](#)   Chair's Report
(10 minutes)

Plan Bay Area Youth Video Challenge Compilation
<https://www.youtube.com/watch?v=6BBJOzpvxDY>

Action: Information

Presenter: Randi Kinman, Council Chair

4.   [21-0976](#)   Approval of the July 14, 2021 Meeting Minutes
(5 minutes)

Action: Approval

Attachments: 04_Council Minutes_July 14 2021.pdf

5. Public Comments / Other Business

*Council 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.*

6.   [21-0977](#)   Subcommittee Reports
(15 minutes)

Action: Information

Presenter: Veda Florez, Policy Advisory Council Equity & Access Subcommittee
Chair and
Adina Levin, Policy Advisory Council Fare Coordination and Integration
Subcommittee Chair

7.   21-0978   Transit Transformation Action Plan
                            (15 minutes)

                            Blue Ribbon Transit Recovery Task Force's Transit Transformation Action
                            Plan.

          Action: Information

          Presenter: Theresa Romell and Melanie Choy

          Attachments: 07_Blue Ribbon Update with Transformation Action Plan and Next Steps.pdf

8.   21-1072   Plan Bay Area 2050: Implementation Plan Partnerships & Final Steps to
                            Adoption
                            (45 minutes)

                            Summary of major findings and considerations from the Partnership Phase
                            of the Implementation Plan as well as final steps for overall Plan Bay Area
                            2050 finalization, prior to a joint meeting of the Commission and ABAG
                            Executive Board in October to consider Final Plan adoption.

          Action: Information

          Presenter: Chirag Rabari and Dave Vautin

          Attachments: 08_Plan Bay Area 2050-Implementation Plan Partnerships and Final Steps to A

                            08_PLNG-6a-Handout-Attachment B_PBA2050_IP_Briefs_September 2021.pdf

9.   21-1042   Community-Based Transportation Planning Program Status Update and
                            Evaluation Objectives
                            (30 minutes)

                            Overview of MTC's Community-Based Transportation Planning (CBTP)
                            program, an initiative that provides funding for community-led
                            transportation planning in Equity Priority Communities (EPCs). Staff will
                            review program outcomes and provide an overview of the objectives of an
                            upcoming program evaluation.

          Action: Information

          Presenter: Raleigh McCoy

          Attachments: 09_CBTP Update.pdf

10. 21-1044   One Bay Area Grant (OBAG 3) Considerations
                    (20 minutes)

                    OBAG 3 program considerations and development schedule.

Action: Information

Presenter: Mallory Atkinson

Attachments: 10i_21-1044_OBAG 3_Summary Sheet and Attachments B-E.pdf

                    10ii_21-1044_OBAG3_slides_Attach A.pdf

11. 21-0979   Staff Liaison Report
                    (3 minutes)

                    Relevant MTC policy decisions and other activities.

Action: Information

Presenter: Marti Paschal, Staff Liaison

Attachments: 11_Staff Liaison-September 2021.pdf

12. 21-0980   Council Member Reports
                    (5 minutes)

                    Members of the Council may report on locally relevant issues or events.

Action: Information

Presenter: Randi Kinman, Council Chair

13. 21-0981   New Business
                    (5 minutes)

                    Members of the Council may bring up new business for discussion or
                    addition to a future agenda.

Action: Discussion

Presenter: Randi Kinman, Council Chair

14. Adjournment / Next Meeting

The next meeting of the Policy Advisory Council will be held Wednesday, October 13, 2021, at 1:35 p.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA or remotely and by webcast as appropriate depending on the status of any shelter in place orders. Any changes to the schedule will be duly noticed to the public.

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

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

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

Accessibility and Title VI: MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.
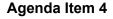
可及性和法令第六章：MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

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

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

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

MTC's Chair and Vice-Chair are ex-officio voting members of all standing Committees.

Metropolitan Transportation Commission

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

Meeting Minutes - Draft

Policy Advisory Council

Randi Kinman, Chair
Cynthia L. Murray, Vice Chair

Wednesday, July 14, 2021	**1:30 PM**	**Board Room - 1st Floor (REMOTE)**

1. Welcome

2. Roll Call / Confirm Quorum

Present: 20 - Burnett, Castellanos, Coates, Eldred, Florez, Hedges, Hernandez, Chair Kinman, Levin, Lopez, Madden, Mendoza, Momoh, Vice Chair Murray, Schweng, Scott, Gotuaco, Wilson, Baldini and Welte

Excused: 2 - Cochran and Kallins

Absent: 1 - Glover

3. [21-0918](#)   Chair's Report
(10 minutes)

Action: Information

Presenter: Randi Kinman, Council Chair

4. [21-0919](#)   Approval of the June 9, 2021 Meeting Minutes
(5 minutes)

Action: Approval

Attachments: [04_Council Minutes_June 9 2021.pdf](#)

Upon the motion by Vice Chair Murray and second by Momoh, the June 9, 2021 Meeting Minutes were unanimously approved. The motion carried by the following vote:

Aye: 16 - Castellanos, Coates, Florez, Hedges, Chair Kinman, Lopez, Madden, Mendoza, Momoh, Vice Chair Murray, Schweng, Scott, Gotuaco, Wilson, Baldini and Welte

Absent: 6 - Cochran, Eldred, Hernandez, Kallins, Levin and Glover

Abstain: 1 - Burnett

Eldred, Hernandez, and Levin arrived after the approval of the June 9, 2021 Meeting Minutes.

5. Public Comment / Other Business

6.   21-0920   Subcommittee Reports
                     (15 minutes)

    Action: Information

    Presenter: Veda Florez, Policy Advisory Council Equity & Access Subcommittee
                     Chair and
                     Adina Levin, Policy Advisory Council Fare Coordination and Integration
                     Subcommittee Chair

7.   21-0921   Blue Ribbon Transit Recovery Task Force Update
                     (15 minutes)

                     Update on the Blue Ribbon Transit Recovery Task Force.

    Action: Information

    Presenter: Theresa Romell and Melanie Choy

    Attachments: 07_Blue Ribbon.pdf

    **Upon the motion by Florez and second by Scott, the Policy Advisory Council
    (Council) unanimously voted to thank the Blue Ribbon Transit Recovery Task
    Force for their work and for including the Council in the process. The Council
    also requested a seat on the post-Blue Ribbon Transit Recovery Task Force
    committee that will focus on the business plan development. The motion carried
    by the following vote:**

    Aye: 19 - Castellanos, Coates, Eldred, Florez, Hedges, Hernandez, Chair Kinman, Levin,
                     Lopez, Madden, Mendoza, Momoh, Vice Chair Murray, Schweng, Scott, Gotuaco,
                     Wilson, Baldini and Welte

    Absent: 3 - Cochran, Kallins and Glover

    Abstain: 1 - Burnett

8.   21-0925   Active Transportation Program
                     (20 minutes)

                     Re-introduce the Active Transportation Plan (AT Plan), focusing on the
                     Plan's vision, mission and targets, the Complete Streets Policy update
                     component, as well as the Stakeholder Engagement Plan.

    Action: Information

    Presenter: Kara Oberg

    Attachments: 08_AT Plan.pdf

9.   21-0922   Staff Liaison Report
(3 minutes)

Relevant MTC policy decisions and other activities.

**Action:**   Information

**Presenter:**   Marti Paschal, Staff Liaison

**Attachments:**   09_Staff Liaison-July 2021.pdf

10.   21-0923   Council Member Reports
(5 minutes)

Members of the Council may report on locally relevant issues or events.

**Action:**   Information

**Presenter:**   Randi Kinman, Council Chair

11.   21-0924   New Business
(5 minutes)

Members of the Council may bring up new business for discussion or addition to a future agenda.

**Action:**   Discussion

**Presenter:**   Randi Kinman, Council Chair

12. Adjournment / Next Meeting

The next meeting of the Policy Advisory Council will be held Wednesday, August 11, 2021, at 1:35 p.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA or remotely and by webcast as appropriate depending on the status of any shelter in place orders. Any changes to the schedule will be duly noticed to the public.

September 8, 2021   **Agenda Item 7**

Transit Transformation Action Plan

Subject:

Blue Ribbon Transit Recovery Task Force's Transit Transformation Action Plan.

Background:

Policy Advisory Council Agenda Item 7, Transit Transformation Action Plan, is attached. This report will be presented to MTC's Operations Committee meeting on September 10, 2021.

Staff will be at your September 8 meeting to deliver and discuss this presentation. The Council's input is requested.

Issues:

None identified.

Recommendations:

Information.

Attachments:

- Attachment A: Agenda Item 5b from the September 10, 2021 Operations Committee meeting.

September 10, 2021   Agenda Item 5b

Transit Transformation Action Plan

Subject:	Blue Ribbon Transit Recovery Task Force's Transit Transformation Action Plan.
Background:	In response to the COVID-19 pandemic, the Commission formed the Blue Ribbon Transit Recovery Task Force in April 2020 to set a course for public transit's recovery and long-term improvement.

Blue Ribbon Transit Recovery Task Force
On May 7, 2020, the Metropolitan Transportation Commission appointed a limited duration, 32-member Blue Ribbon Transit Recovery Task Force, chaired by MTC Commissioner Jim Spering. The group was composed of a diverse set of stakeholders, including advocates for people with disabilities, state legislators, and representatives from the California State Transportation Agency; transit agencies; business and labor groups; transit and social justice advocates; and MTC Commission and Advisory Council. The Task Force met 15 times between May 2020 and July 2021.

The Task Force assisted the Commission with understanding the scale of the COVID-19 crisis facing Bay Area transit systems and was charged with a three-stage purpose:
- **Stage 1:** Assist in the distribution of $500 million in 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.

Transit Transformation Action Plan
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 this work is the Bay Area Transit Transformation Action Plan (Action Plan). It identifies five desired outcomes and 27 associated, near-term actions needed to achieve a more connected, efficient, and user-focused mobility network across the Bay Area and beyond. At its final meeting on July 26, 2021, the Task Force approved

these actions and forwarded the Action Plan to the Commission for consideration.

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. Several important features are built into the Action Plan.

- Shared responsibility and ongoing collaboration among operators, MTC and the spectrum of transit stakeholders.
- Elevating the urgent needs of the region's disadvantaged and low-income populations.
- MTC's existing authority should be exercised fully to implement the plan's recommended actions.
- These actions accompany many other network management duties currently being performed by transit agencies and accelerate the work already underway at MTC on three important customer-focused initiatives.
- A business case analysis of institutional reforms with input from a multi-stakeholder advisory body is necessary to confirm implementation of next steps.

Next Steps
The momentum created by the Task Force will continue through a series of follow-through actions.

1) Return To Transit: 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.
2) Network Management: Based on the Network Management Alternatives Evaluation developed by the VIA Architecture team, MTC is initiating the Network Management Business Case analysis that is anticipated to be completed in mid-2022. This analysis will be guided by an MTC-appointed, multi-stakeholder advisory group to serve as a sounding board. The Commission is scheduled to act on this Network Management Business Case Advisory group at the September 2021 Commission meeting.
3) Action Plan Implementation: MTC will begin outlining implementation activities and next steps based on resources, funding and regional priorities, with a focus on fare integration, unified mapping and wayfinding, and travel time advantages for buses as high-priority near-term actions. In October, the Commission will hold a workshop where refinement and details of the Action Plan will be discussed.

Issues: Timely implementation of the Action Plan actions is ambitious. In
                       October, the Commission will hold a workshop to further discuss Action
                       Plan staffing, funding, prioritization, and target completion dates. Target
                       completion dates in the Action Plan are preliminary and will be
                       continually evaluated and refined. Success will be dependent on sufficient
                       funding (combination of existing and new funding sources), staffing
                       resources, and continued collaboration.
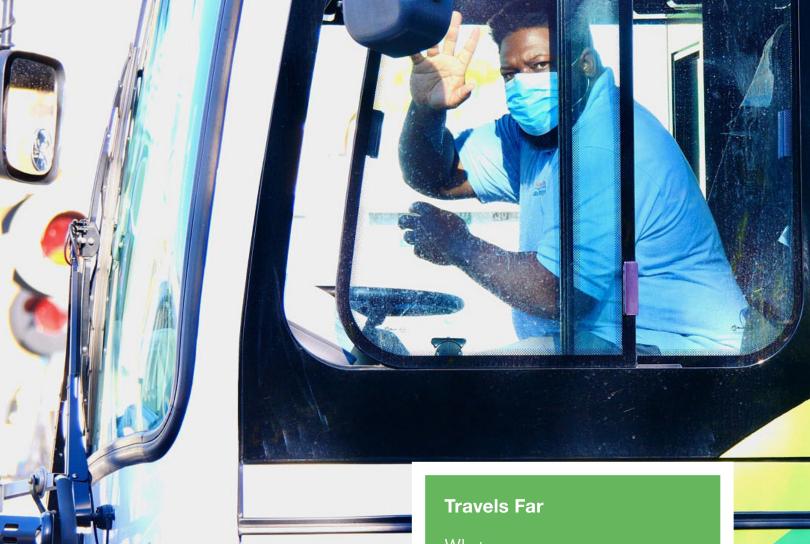
Recommendation: Receive and Accept

Attachments: Attachment A: Transit Transformation Action Plan
                       Attachment B: PowerPoint

                                                  _____
                                                  Therese W. McMillan

BAY AREA TRANSIT TRANSFORMATION
ACTION PLAN

JULY 2021

BLUE RIBBON
TRANSIT RECOVERY
TASK FORCE

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 stanger'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.

MESSAGES FROM THE CHAIRS

Alfredo Pedroza

Chair, Metropolitan Transportation Commission (MTC)

Since March 2020, 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 Bay Area deserves.

MTC is committed to taking a leading role in this effort toward transformative outcomes; 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 acceptance in September followed by a proposed Year 1 work program by the end of 2021.

Jim 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 participated while also tackling historically severe impacts to their organizations.

The Task Force benefited 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.

BLUE RIBBON TRANSIT RECOVERY 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.

METROPOLITAN TRANSPORTATION COMMISSION (MTC)

Jim Spering,
Task Force Chair and Solano County Supervisor

Alfredo Pedroza
MTC Chair and Napa County Supervisor

Nick Josefowitz
MTC Vice Chair and San Francisco Mayor's Appointee to MTC

Cindy Chavez
Santa Clara County Supervisor

Gina Papan
City of Millbrae Council Member

David Rabbitt
Sonoma County Supervisor

Amy Worth
City of Orinda Mayor

Therese W. McMillan
MTC Executive Director

STATE OF CALIFORNIA REPRESENTATIVES

The Honorable Dave Cortese
California State Senate

The Honorable David Chiu
California State Assembly

The Honorable David Kim, Secretary,
California State Transportation Agency

TRANSIT OPERATORS

Michelle Bouchard, Caltrain,
Acting Executive Director

Carolyn M. Gonot, Santa Clara Valley Transportation Authority (VTA), General Manager

Michael Hursh, Alameda-Contra Costa Transit District, General Manager

Carter Mau, San Mateo County Transit District (SamTrans), Acting General Manager and CEO

Denis Mulligan, Golden Gate Bridge, Highway and Transportation District, General Manager and CEO

Robert Powers, Bay Area Rapid Transit, General Manager

Rick Ramacier, County Connection, General Manager

Michael Tree, Livermore Amador Valley Transit Authority, General Manager

Jeffrey Tumlin, San Francisco Municipal Transportation Agency (SFMTA), Director of Transportation

Nancy Whelan, Marin Transit, General Manager

STAKEHOLDERS

Jason Baker, Silicon Valley Leadership Group, Vice President

John Ford, Commute.org, Executive Director

Ian Griffiths, Seamless Bay Area, Co-Founder and Director

Darnell Grisby, TransForm, Executive Director

Daryl Halls, Bay Area County Transportation Agencies

Randi Kinman, MTC Policy Advisory Council

James Lindsay, Amalgamated Transit Union, President

Stacy Murphy, Teamsters 853, Trustee

Susan Rotchy, Independent Living Resource Center, Executive Director

Ellen Wu, Urban Habitat, Executive Director

Jim Wunderman, Bay Area Council, President and CEO

FORMER TASK FORCE MEMBERS

Several Blue Ribbon Transit Recovery Task Force members departed positions during the course of the Task Force or served partial terms. Their service and contribution to the Task Force also are greatly appreciated.

Jim Beall
former California State Senator

Hayley Currier, TransForm, Policy Advocacy Manager

Nuria Fernandez, VTA, former General Manager

Carl Guardino, Silicon Valley Leadership Group, former CEO

Scott Haggerty, former MTC Chair and Alameda County Supervisor

Jim Hartnett, SamTrans/Caltrain, former General Manager/ Chief Executive Officer

Evelynn Tran, VTA, former Interim General Manager

"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, was finalizing its 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 Bay Area's dozens of transportation agencies to maximize the performance of the entire public transit system by January 1, 2023.
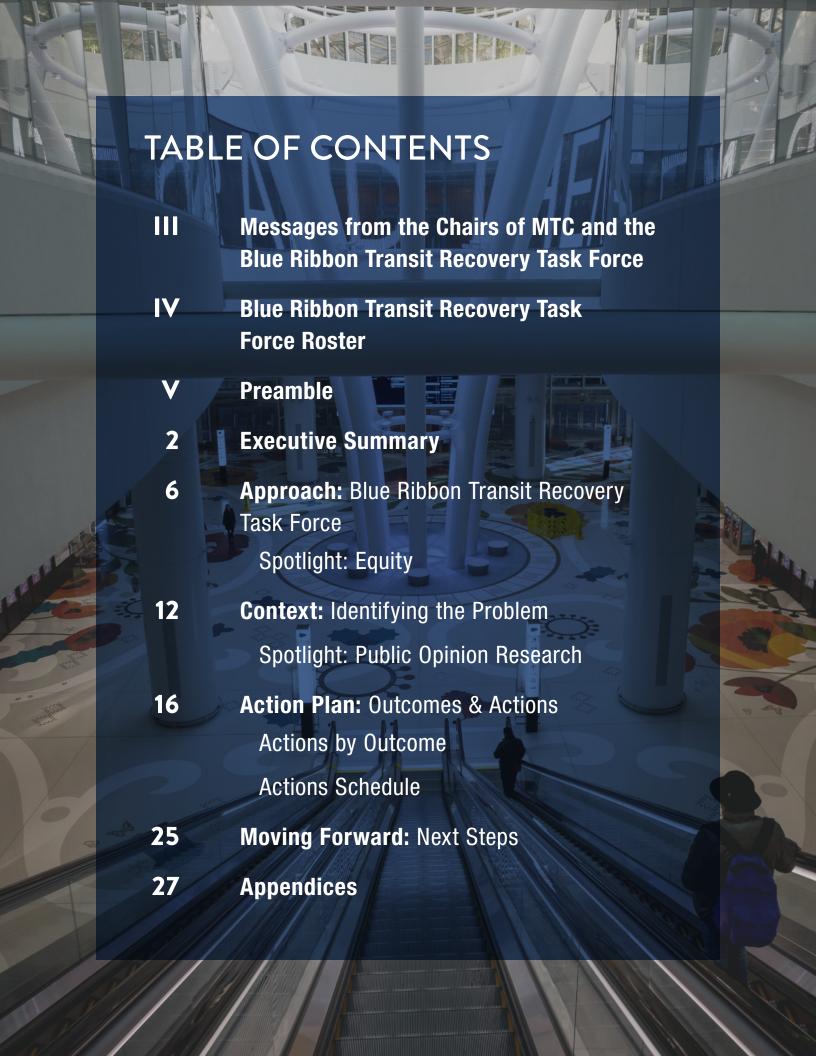
Silently and unseen, the nation was also experiencing the first cases of what would become an unprecedented health crisis. The federal government announced the first confirmed case of COVID-19 in the United States on January 21st. Just ten days later, the World Health Organization declared a "global 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 an opportunity to plant the seeds of transformation for the Bay Area's public transit system. With this in mind, the Commission on April 22nd established the Blue Ribbon Transit Recovery Task Force to set a course for transit's recovery and long-term improvement.

TABLE OF CONTENTS

EXECUTIVE SUMMARY

On April 22, 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 Jim 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.

The Task Force was charged with 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 –** Support 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.

"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.

EXECUTIVE SUMMARY

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 Task Force's work 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 vulnerable and diffuse 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 November 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 I* for complete Goals & Objectives

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 group 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 operators must continue and grow. Joint legislative

advocacy and consistent public communication must be bolstered. Partnerships must be forged through the rail partnerships 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 operators to embrace changes that put the customer first, continued collaborative efforts with stakeholders, jointly developed legislative initiatives, and vital new sources of transit funding.

Transformational Outcomes

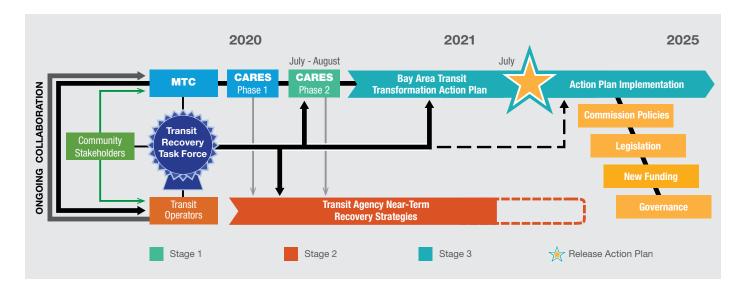|	
Fares and Payment	Simpler, consistent, and equitable fare and payment options attract more riders.
Customer Information	Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.
Transit Network	Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.
Accessibility	Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.
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.

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.

As of June 2021, ridership across the Bay Area was down by a crippling 67 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.

BAY AREA TRANSIT RIDERSHIP [ALL OPERATORS]

JUNE 2021
RIDERSHIP DOWN 67%
FROM PRE-PANDEMIC
LEVELS (JUNE 2019)

Source: National Transit Database and Operator Data

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 operators as a result of the COVID-19 pandemic — and responding to the crisis.

Stage 1: Survival
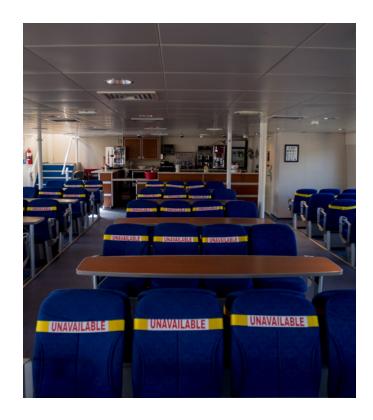
The first stage of the Task Force's work was to recommend to the Commission a fair and thoughtful distribution of $500 million in phase 2 federal CARES Act relief funds to the Bay Area's 27 transit operators. Retaining service for essential trips serving low-income and vulnerable riders was confirmed as the highest priority.

Stage 2: Recovery
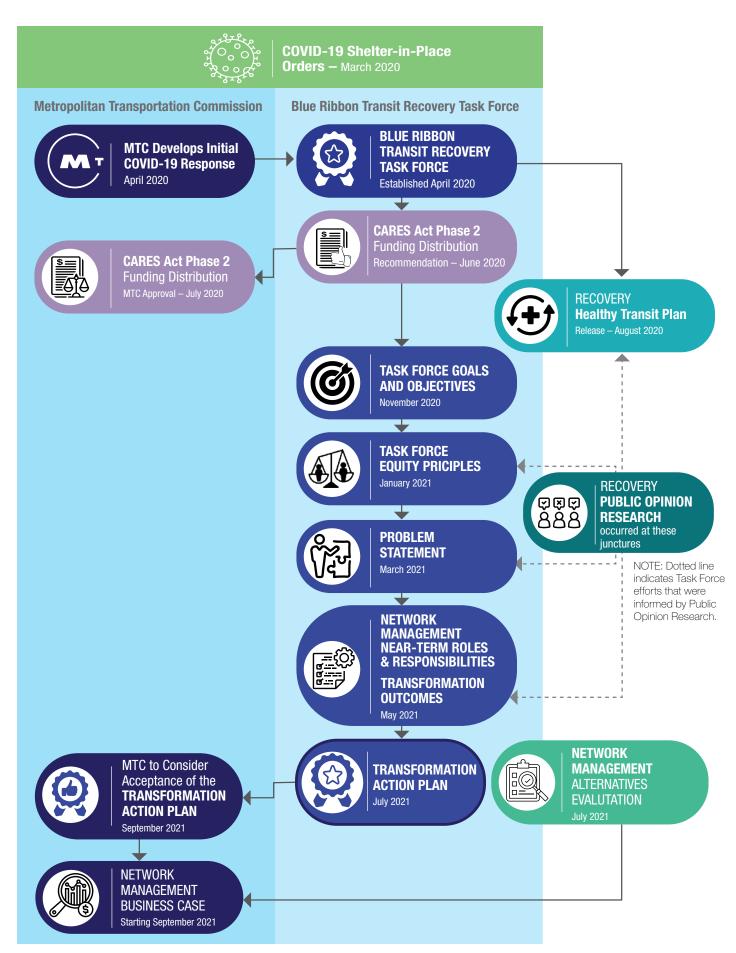
In the second stage of its work, the Task Force focused on transit operators' near-term recovery strategies and supported their collaborative recovery practices. Rider and transit employee safety, consistent cleaning protocols, and transparent public communication were key Task Force interests. Two products 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 operators 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 operators 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.

APPROACH: BLUE RIBBON TRANSIT RECOVERY TASK FORCE

COVID-19 Shelter-in-Place Orders — March 2020

Metropolitan Transportation Commission

Blue Ribbon Transit Recovery Task Force

MTC Develops Initial COVID-19 Response
April 2020

BLUE RIBBON TRANSIT RECOVERY TASK FORCE
Established April 2020

CARES Act Phase 2 Funding Distribution
Recommendation — June 2020

CARES Act Phase 2 Funding Distribution
MTC Approval — July 2020

RECOVERY
Healthy Transit Plan
Release — August 2020

TASK FORCE GOALS AND OBJECTIVES
November 2020

TASK FORCE EQUITY PRICIPLES
January 2021

RECOVERY
PUBLIC OPINION RESEARCH
occurred at these junctures

NOTE: Dotted line indicates Task Force efforts that were informed by Public Opinion Research.

PROBLEM STATEMENT
March 2021

NETWORK MANAGEMENT NEAR-TERM ROLES & RESPONSIBILITIES

TRANSFORMATION OUTCOMES
May 2021

MTC to Consider Acceptance of the **TRANSFORMATION ACTION PLAN**
September 2021

TRANSFORMATION ACTION PLAN
July 2021

NETWORK MANAGEMENT ALTERNATIVES EVALUTATION
July 2021

NETWORK MANAGEMENT BUSINESS CASE
Starting September 2021

During its term, the Task Force set Goals and Objectives 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 initiatives, agency integration progress in Sonoma County, and public opinion research. The Task Force invited members to submit alternative governance proposals to support the Action Plan's implementation.

An independent consultant 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. The consultants' 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 near-term 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.

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 other 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 *Appendix I*) called for the inclusion of input from underserved populations, transit-dependent riders, and persons with disabilities to inform this Action Plan.

Blue Ribbon Transit Recovery Task Force
Equity Principles
(adopted January 25, 2021)

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 IN-FORM 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
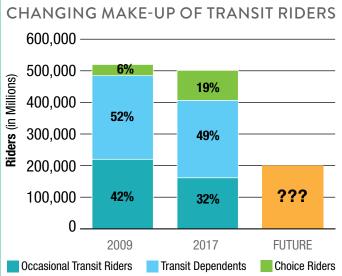
The Task Force also adopted five Equity Principles central to planning and operations (*see previous page*), based on input directly from disadvantaged riders and community leaders. These principles can serve as a compass to continually point leaders, public agencies, advocates, and communities toward an equitable and lasting recovery.

The Task Force's adopted Problem Statement (see *Appendix II*) 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 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.

CHANGING MAKE-UP OF TRANSIT RIDERS

Riders (in Millions)

	2009	2017	FUTURE
Choice Riders	6%	19%	
Transit Dependents	52%	49%	
Occasional Transit Riders	42%	32%	???

■ Occasional Transit Riders ■ Transit Dependents ■ Choice Riders

What can data tell us? Who is riding transit now? How can we meet the needs of current riders, and what other data do we need in the future?
(2009 & 2017 Data Source: UCLA Institute of Transportation Studies, "What's Behind Recent Transit Ridership Trends in the Bay Area?" February 2020)

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.

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, 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

Problem Statement

In March 2021, the Task Force approved a problem statement that identified a broad range of transit challenges across four categories.

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.

See *Appendix II* for full Problem Statement

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, the Bay Area 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. Transit ridership's downward trend must be reversed 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 the Clipper® regional transit-fare payment card 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 AB 2057, 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. This will require difficult decisions 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.

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 funds. While the funding amounts provided to individual transit agencies for some programs are 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.

MTC and the Bay Area's transit providers are working toward providing better information about key transit modes and connections.

Coordination Legislation

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.

Resolution 3866

MTC implements these transit coordination requirements through Resolution 3866, which was updated most recently in 2015 and lists out the transit coordination requirements by which operators must abide 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 to 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 to 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 the emergency, and looking into the future; to hear the perspectives of underserved groups; and to gauge 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

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

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

focus groups, employer focus groups and surveys, a statistically valid poll of Bay Area residents, and 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 stand out in the research as ways to improve convenience and ease of travel, and to 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.

ACTION PLAN: OUTCOMES AND ACTIONS

A Blueprint for Attracting More Riders to Transit

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.

The outcomes grew from 14 Task-Force-approved priority roles and responsibilities for network management reform consideration (see *Appendix III*), which were selected from a larger list of 21 roles and responsibilities that included mega-project delivery and oversight. An initial description of the roles and responsibilities was developed to clarify and guide Task Force discussions (see *Appendix IV*) and will be refined in the upcoming business case assessment.

Each action is targeted for completion within approximately 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 operators, MTC and other stakeholders will need to continue and increase. Target completion dates are preliminary and subject to continued evaluation and refinement.

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 achieve transit transformation; independent

Transformational Outcomes

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

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

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

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

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.

and collaborative efforts by all transit operators must continue and expand. Joint legislative advocacy and consistent, well-researched public communication must be bolstered.

The current grant-funded assessment of rail partnerships (see at right), 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 accelerate these efforts and give them priority for funding and staffing resources relative to other actions.

- 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. The consultants 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 Assessment: Project Delivery and Governance

Independent but related to the Network Management Business Case is a current grant-funded assessment of rail project delivery and governance. 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 Business Case and ongoing rail governance policy considerations throughout the region and the state of California as a whole.

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® regional transit-fare payment card
- Clipper START
- Inter-operator transfer policies
- Mobile payment apps

FARES & PAYMENT

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

* Key to Estimated Range of Funding Needs:

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

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 Operators	**$**
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 and routine updating of digital and paper maps across all transit services.	Late 2023	MTC, Transit Operators	**$**

* Key to Estimated Range of Funding Needs:

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

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
- Richmond-San Rafael, Dumbarton and Bay Bridge 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
- Operators' transit hub coordination framework
- Transit connectivity tool (software)
- Regional Annual Transit Passenger Survey

BUS TRANSIT PRIORITY [speed & reliability]

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
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 Operators	$
9. Fund the design and delivery of prioritized near-term transit corridor projects.	Mid-2022	MTC, Transit Operators, County Transportation Agencies (CTAs)	$$$$

* Key to Estimated Range of Funding Needs:

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

Transit Network: *(continued)*

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

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
10. Select near-term HOV lane operating policies to advance to the State.	Mid-2022	MTC, Transit Operators, 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 Operators, Cities	$
12. 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 Operators, Cities	$

BUS/RAIL NETWORK MANAGEMENT REFORM

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
13. Fund and complete a business case analysis of potential network management reforms, including resource requirements and implementation steps.	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 Efficiencies 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 Operators, CTAs	$

CONNECTED NETWORK PLANNING

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
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 2023	MTC, Transit Operators	$
19. Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local government access plans and policies.	Late 2023	MTC, Transit Operators	$

DATA COLLECTION AND COORDINATION

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
20. 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 Operators	$

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*
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 Operators, CTAs	**$**
22. Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips.	Late 2022	MTC, Transit Operators, East Bay, Sonoma County, SF / Peninsula	**$ $**
23. Identify the next steps for the full integration of ADA-paratransit services on Clipper Next Generation.	Late 2022	MTC, Transit Operators, Paratransit Providers	**$**
24. Identify key paratransit challenges and recommend reforms through the Coordinated Plan update.	Early 2023	MTC, Paratransit Providers	**$**
25. Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC).	Late 2022	MTC, Bay Area Partnership Accessibility Committee	**$**

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

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*
26. Identify cost-saving efficiencies and network management funding needs as part of business case analysis.	Early 2022	MTC, Transit Operators	$
27. 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 Operators, CTAs, Stakeholders, the Public, NGOs	$

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

TRANSIT TRANSFORMATION ACTIONS SCHEDULE

NETWORK MANAGEMENT OUTCOMES		ACTIONS	TARGET COMPLETION DATE										
			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 for FCIS implementation		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 and a process for applying them				X							
	Connected Network Planning	18. Fund, develop and adopt a Bay Area Connected Network Plan								X			
		19. Adopt a transit hub toolkit to optimize station design and connectivity								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			

MOVING FORWARD: NEXT STEPS

Keeping the Momentum

The Bay Area Transit Transformation Action Plan was unanimously approved 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 operators 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 (at right).

Charting a Path

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 acceptance of the Bay Area Transit Transformation Action Plan.
- MTC to consider appointing a limited-term (approximately one year) advisory group to work with the consultants to complete a business case analysis of network management alternatives.

OCTOBER – DECEMBER 2021
- MTC workshop to include discussion of Action Plan staffing and funding requirements. Action Plan prioritization and preliminary target dates will be evaluated and refined.
- Convene initial meeting of the Network Management Business Case Advisory Group.
- Kick off business case analysis of network management alternatives.

JANUARY 2022 AND BEYOND
- 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.
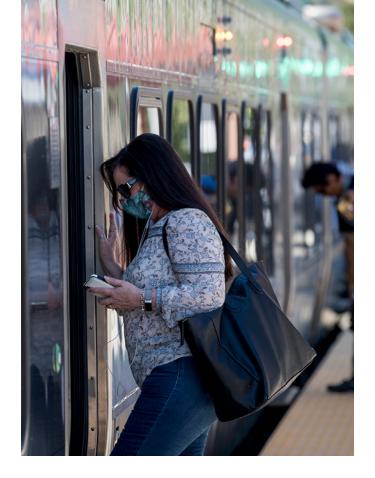- Make funding and timing adjustments based on assessment of the efforts.

ACTION PLAN: NEXT STEPS
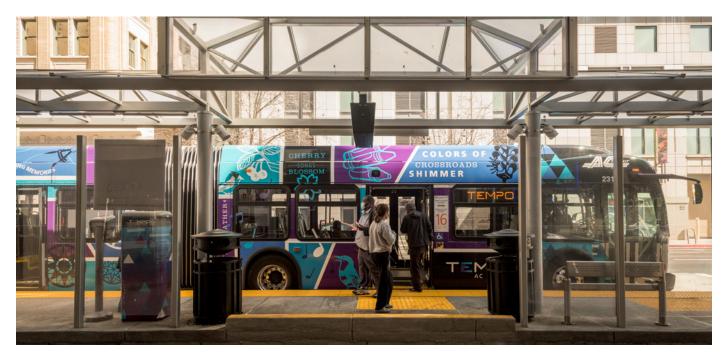
A Shared Responsibility

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 operators, 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.

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**

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.

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.[1]

- 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[2], and it is unclear when, and to what extent, ridership will return.

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1   MTC – Transit Sustainability Project, May 2012
2   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[3] 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 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.

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3   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.[4] 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.[5]

- 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.[6]

- 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.[7]

- Large operators' customers are expressing greater rider health and safety concerns.[8]

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

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

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

7   MTC – Bay Area Core Capacity Study, September 2017

8   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 residents and people of color to car-dependent communities, reducing full access to economic opportunities due to longer, less convenient, and more expensive mobility options.[9]

- 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.[10]

- 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.[11]

- Changing current funding levels or priorities cannot be done without understanding difficult tradeoffs.

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

10   MTC – Transit Sustainability Project, May 2012

11   MTC – Transit Sustainability Project, May 2012

PRIORITY ROLES AND RESPONSIBILITIES FOR NETWORK MANAGEMENT ALTERNATIVES EVALUATION

ADOPTED WITH AMENDMENTS MAY 24, 2021

Network Management Outcomes	Roles & Responsibilities[1]
FARES AND PAYMENT: Simpler, consistent, and equitable fares and payment options attract more riders.	• Fare Integration Policy
CUSTOMER INFORMATION: 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 • Marketing / Public Information • Technology and Mobile Standards (Real Time Info)
TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient and reliable network.	• Bus Transit Priority • Connected Network Planning • Station Hub Design Review • Data Collection and Coordination • Capital Project Prioritization • Bus Network Management Reform • Rail Network Management Reform
ACCESSIBILITY: Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.	• Accessible Services (including Paratransit) • Centralized Program Eligibility Verification
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.	• Funding Advocacy

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1   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. Six additional roles and responsibilities that were considered for Network Management alternatives evaluation but not adopted were: Current Services Coordination, Capital Project Prioritization, Performance Management Standards, Procurement and Contracting, Emergency Coordination, and School Services.

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
FARES AND PAYMENT: Simpler, consistent, and equitable fares and payment options attract more riders.	**Fare Integration Policy**	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.
CUSTOMER INFORMATION: 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**	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.

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

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **CUSTOMER INFORMATION: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.**	**Technology and Mobile Standards**	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.
	Marketing/Public Information	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.
TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	**Bus Transit Priority**	The focus of this work is on projects, programs and policies that enable buses to achieve travel time benefits over private automobiles. Specific areas may include dedicated transit lanes, 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 signal priority equipment and software. Advancing CEQA *(continued on next page)*

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

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.**	*(continued)* **Bus Transit Priority**	*(continued)* Streamlining legislation (such as extending and broadening SB 288) would serve to remove project implementation barriers, particularly in relation to transit priority.
	Connected Network Planning	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.
	Station Hub Design Review	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 *(continued on next page)*

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

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.**	*(continued)* **Station Hub Design Review**	*(continued)* and design hubs for ease of use and navigation so that wayfinding becomes more intuitive and effective and connected with the community.
	Data Collection and Coordination	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.
	Capital Project Prioritization	Based on projects identified in the adopted Plan Bay Area 2050 Blueprint, assess, identify, and prioritize transit capital projects for funding and development.
	Bus Network Management Reform	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.
	Rail Network Management Reform	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.

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

Network Management Outcomes	Roles & Responsibilities	Description
ACCESSIBILITY: **Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.**	**Accessible Services (including Paratransit)**	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.
	Centralized Program Eligibility Verification	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.
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.**	**Funding Advocacy**	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.

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.

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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%.*
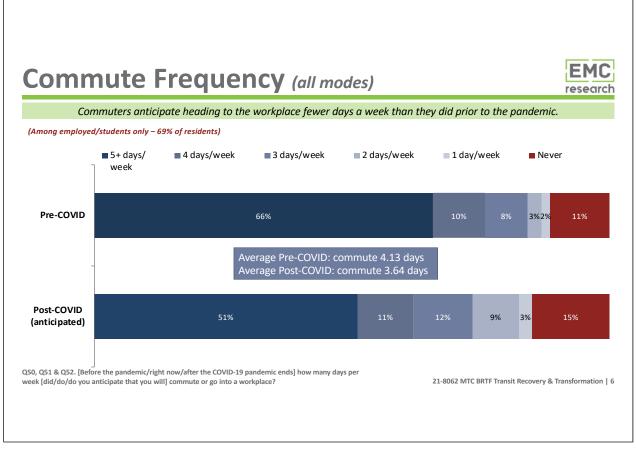
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Summary of Research Findings

EMC research

▸ 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

EMC research

Commute Frequency & Transit Use

Commute Frequency *(all modes)*

EMC research

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

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

Legend: ■ 5+ days/week ■ 4 days/week ■ 3 days/week ■ 2 days/week ■ 1 day/week ■ Never

Pre-COVID
| 66% | 10% | 8% | 3% | 2% | 11% |

Average Pre-COVID: commute 4.13 days
Average Post-COVID: commute 3.64 days

Post-COVID (anticipated)
| 51% | 11% | 12% | 9% | 3% | 15% |

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

21-8062 MTC BRTF Transit Recovery & Transformation | 6

Work from Home

BAY AREA COUNCIL   EMC research

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

More productive 52%

Somewhat 24%

Much 28%

Less productive 28%

Somewhat 21%

Much 7%

About the same/ (Don't know) 20%

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

21-8062 MTC BRTF Transit Recovery & Transformation | 7

Employer Return to Office

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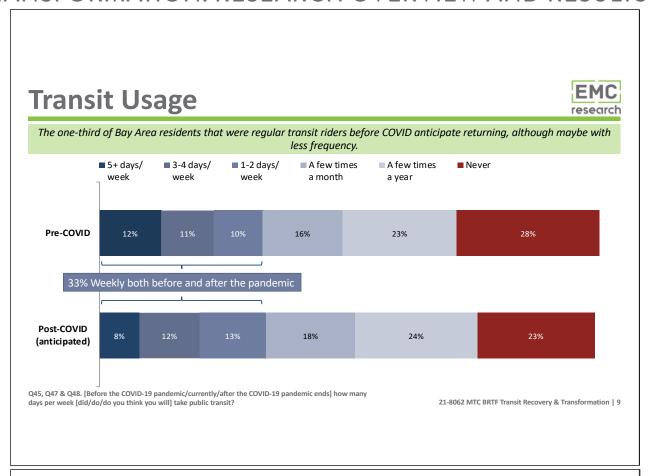
Employers surveyed are anticipating their employees will generally spend fewer days in the office post-COVID than they did prior.

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

Transit Usage

EMC research

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

Legend:
- ■ 5+ days/ week
- ■ 3-4 days/ week
- ■ 1-2 days/ week
- A few times a month
- A few times a year
- ■ Never

Pre-COVID

| 12% | 11% | 10% | 16% | 23% | 28% |

33% Weekly both before and after the pandemic

Post-COVID (anticipated)

| 8% | 12% | 13% | 18% | 24% | 23% |

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

EMC research

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**."
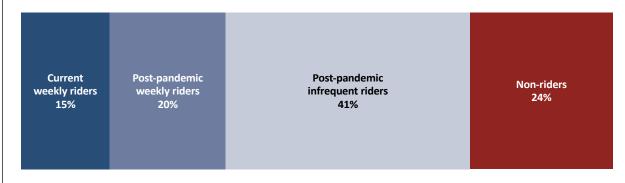
-- Pre-pandemic transit rider

"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

Transit Usage Groupings

EMC research

Current weekly riders 15%	Post-pandemic weekly riders 20%	Post-pandemic infrequent riders 41%	Non-riders 24%

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

EMC research
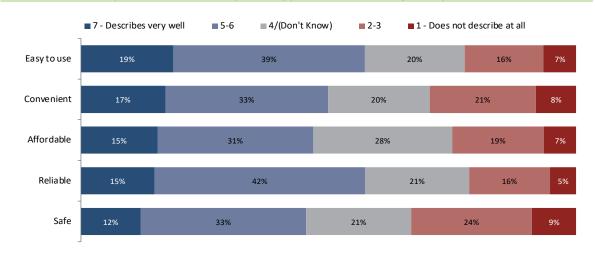
Transit Perceptions

Pre-COVID Transit Perceptions

EMC research

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

Legend: ■ 7 - Describes very well ■ 5-6 ■ 4/(Don't Know) ■ 2-3 ■ 1 - Does not describe at all

	7 - Describes very well	5-6	4/(Don't Know)	2-3	1 - Does not describe at all
Easy to use	19%	39%	20%	16%	7%
Convenient	17%	33%	20%	21%	8%
Affordable	15%	31%	28%	19%	7%
Reliable	15%	42%	21%	16%	5%
Safe	12%	33%	21%	24%	9%

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

21-8062 MTC BRTF Transit Recovery & Transformation | 13

Focus Groups: Transit Perceptions

EMC research

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 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
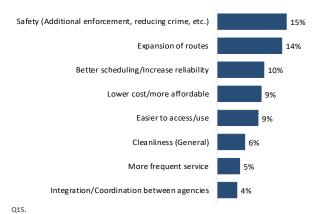
Future Transit Improvements: Top Responses

EMC research

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?

Response	%
Safety (Additional enforcement, reducing crime, etc.)	15%
Expansion of routes	14%
Better scheduling/Increase reliability	10%
Lower cost/more affordable	9%
Easier to access/use	9%
Cleanliness (General)	6%
More frequent service	5%
Integration/Coordination between agencies	4%

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

Q15.
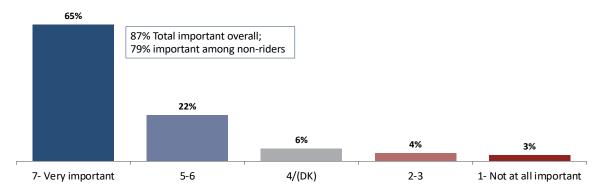
21-8062 MTC BRTF Transit Recovery & Transformation | 15

Importance of Transit to the Bay Area

EMC research

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?

87% Total important overall;
79% important among non-riders

Rating	%
7- Very important	65%
5-6	22%
4/(DK)	6%
2-3	4%
1- Not at all important	3%

Q4.

21-8062 MTC BRTF Transit Recovery & Transformation | 16

Focus Groups: Importance of Transit

EMC research

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."
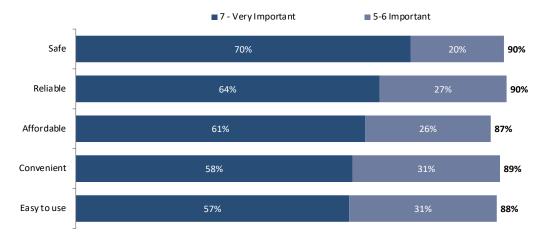
-- CBO focus group participant (English language group)

21-8062 MTC BRTF Transit Recovery & Transformation | 17

Post-COVID Transit Importance

EMC research

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

	7 - Very Important	5-6 Important	
Safe	70%	20%	**90%**
Reliable	64%	27%	**90%**
Affordable	61%	26%	**87%**
Convenient	58%	31%	**89%**
Easy to use	57%	31%	**88%**

Q10-Q14. Now think about the future of public transit <u>following</u> 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

EMC research
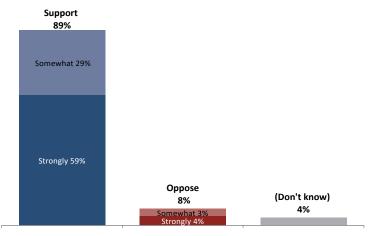
Bay Area Seamless and Resilient Transit Act

Support for Seamless Concept

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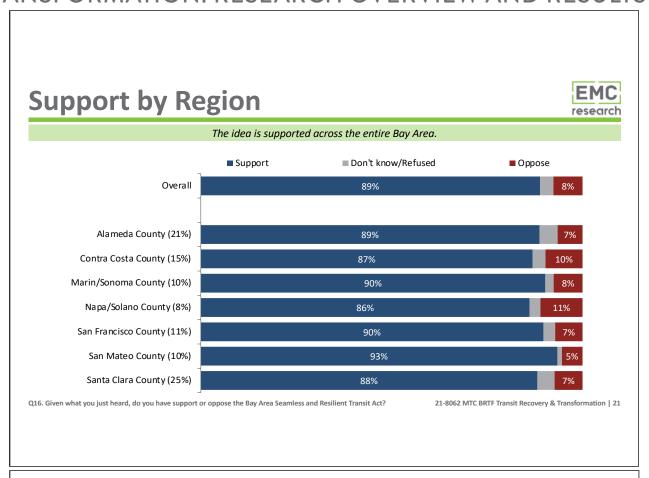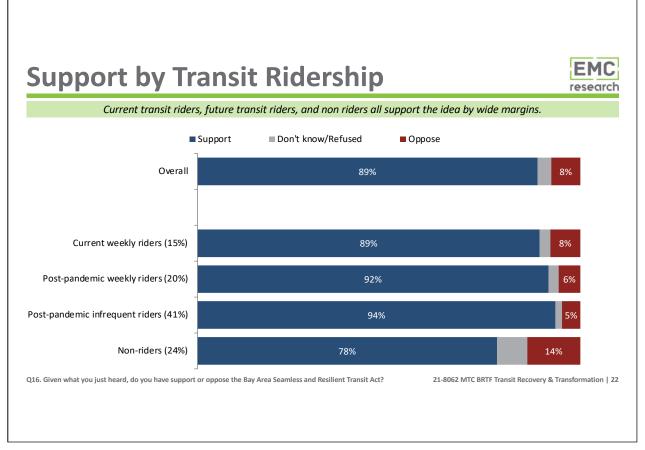
Support for the idea of better coordinated seamless transit for the Bay Area is nearly universal.

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.

Support 89%

Somewhat 29%

Strongly 59%

Oppose 8%

Somewhat 3%
Strongly 4%

(Don't know) 4%

Q16. Given what you just heard, do you have support or oppose the Bay Area Seamless and Resilient Transit Act?   21-8062 MTC BRTF Transit Recovery & Transformation | 20

Support by Region

EMC research

The idea is supported across the entire Bay Area.

■ Support   ■ Don't know/Refused   ■ Oppose

Region	Support	Oppose
Overall	89%	8%
Alameda County (21%)	89%	7%
Contra Costa County (15%)	87%	10%
Marin/Sonoma County (10%)	90%	8%
Napa/Solano County (8%)	86%	11%
San Francisco County (11%)	90%	7%
San Mateo County (10%)	93%	5%
Santa Clara County (25%)	88%	7%

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

21-8062 MTC BRTF Transit Recovery & Transformation | 21

Support by Transit Ridership

EMC research

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

■ Support   ■ Don't know/Refused   ■ Oppose

Ridership	Support	Oppose
Overall	89%	8%
Current weekly riders (15%)	89%	8%
Post-pandemic weekly riders (20%)	92%	6%
Post-pandemic infrequent riders (41%)	94%	5%
Non-riders (24%)	78%	14%

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

21-8062 MTC BRTF Transit Recovery & Transformation | 22

Focus Groups: Support for Integrated System

EMC research

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

EMC research

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

Elements of Seamless

EMC research
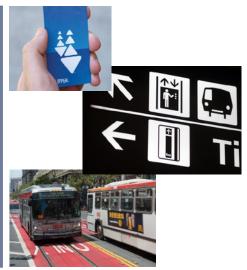
Bay Area residents all want the same things:

- 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

EMC research

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

Impact of Additional Information

EMC research

Outcomes of the proposal are compelling.

	■ 7: Very Convincing	■ 5-6	**Total Convincing**
Reduces fares & implement one set of passes and discounts	44%	36%	**80%**
Creates a seamless transit network for the entire Bay Area	40%	38%	**78%**
Makes transit more affordable, efficient, and convenient for low income communities that need it most	40%	36%	**76%**
Bay Area should lead in addressing climate change and reducing GHGs by making transit a real option	39%	32%	**72%**
Not enough to go back to fragmented system we had	38%	35%	**73%**
Consistent real-time transit vehicle tracking	36%	40%	**76%**
Allows regional transit planners to make decisions about routes, schedules, connections, and transit vehicle priority	35%	39%	**74%**

* 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

EMC research

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.**"

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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"
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"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

Impact of Counter Information

EMC research

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

■ 7: Very Convincing   ■ 5-6   **Total Convincing**

Statement	7: Very Convincing	5-6	Total Convincing
Transit should be focused on clean and safe during the pandemic, this is not the time for change	13%	21%	**34%**
Local agencies know their communities best	12%	27%	**40%**
Should not invest in declining system nobody will ride	11%	20%	**31%**
Ignores needs of transit-dependent communities	11%	21%	**32%**
One set of regional fares will reduce revenues, meaning cuts, less maintenance, and reduced cleaning	10%	27%	**37%**
Destroys unique local character of transit services	8%	15%	**24%**

* 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

EMC research

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**."
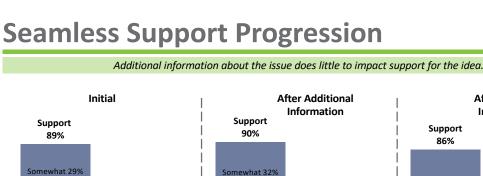
-- CBO focus group participants (Persons with disabilities group)

"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)
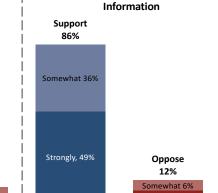
21-8062 MTC BRTF Transit Recovery & Transformation | 30

Seamless Support Progression

EMC research

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

Initial

Support 89%
Somewhat 29%
Strongly, 59%
Oppose 8%
Somewhat 4%
Strongly, 3%

After Additional Information

Support 90%
Somewhat 32%
Strongly, 57%
Oppose 8%
Somewhat 5%
Strongly, 3%

After Counter Information

Support 86%
Somewhat 36%
Strongly, 49%
Oppose 12%
Somewhat 6%
Strongly, 6%

21-8062 MTC BRTF Transit Recovery & Transformation | 31

Conclusions

EMC research

▸ 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

EMC research

Ruth Bernstein
Ruth@EMCresearch.com
510.550.8922

Sara LaBatt
Sara@EMCresearch.com
510.550.8924

Chelsea Sektnan
Chelsea@EMCresearch.com
202.849.6525

NOTES:

NOTES:

METROPOLITAN
TRANSPORTATION
COMMISSION

Bay Area Metro Center
375 Beale Street, Suite 800
San Francisco, California 94105

TEL   415.778.7600
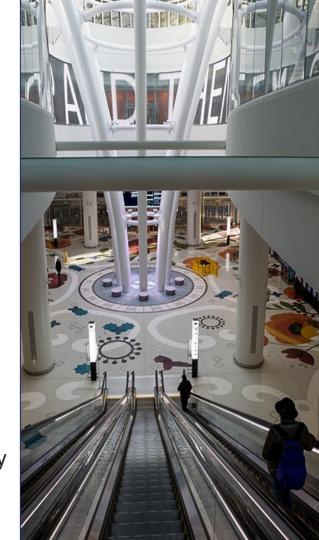
WEB   www.mtc.ca.gov/TransitActionPlan

BLUE RIBBON

TRANSIT RECOVERY
TASK FORCE

TRANSIT TRANSFORMATION ACTION PLAN

Operations Committee

September 10, 2021

BLUE RIBBON TRANSIT RECOVERY TASK FORCE
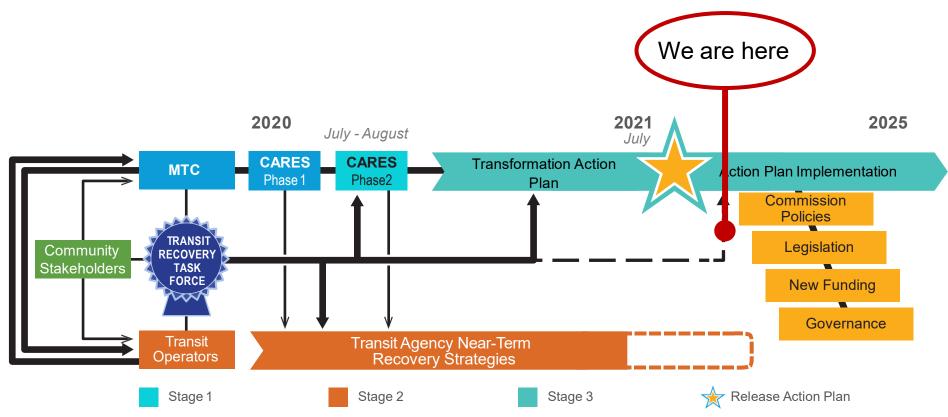
Appointed by MTC in April 2020 to guide the Bay Area's transit system recovery in response to the COVID-19 pandemic

- 32 members composed of representatives from the State, MTC Commission, transit operators, and stakeholder groups:

- CalSTA Secretary David Kim

- State Senator Dave Cortese

- Assemblymember David Chiu

- 8 MTC Commissioners and MTC Executive Director

- 10 Transit Agency General Managers

- 10 stakeholders representing the interests of labor, business, transit & social equity advocacy organizations, and persons with disabilities

- A representative of the county transportation agencies

TASK FORCE TIMELINE

BLUE RIBBON
TRANSIT RECOVERY
TASK FORCE

We are here

2020
July - August
2021
July
2025

MTC

CARES Phase 1

CARES Phase2

Transformation Action Plan

Action Plan Implementation

Community Stakeholders

TRANSIT RECOVERY TASK FORCE

Commission Policies

Legislation

New Funding

Governance

Transit Operators

Transit Agency Near-Term Recovery Strategies

Stage 1   Stage 2   Stage 3   Release Action Plan

3

TASK FORCE PURPOSE

STAGE 1
SURVIVAL

Assist in distribution of $500 million in remaining federal Coronavirus Aid, Relief, and Economic Security (CARES) Act relief funds.

STAGE 2
RECOVERY

Support operators' recovery planning.

- Healthy Transit Plan
- Return to Transit Campaign
- Public Opinion Research
- Operator Collaboration and Immediate Response

STAGE 3
TRANSFORMATION

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.

APPROVED GOALS
(November 2020)

1 **Goal 1: RECOVERY**
Recognize critical recovery challenges facing transit agencies
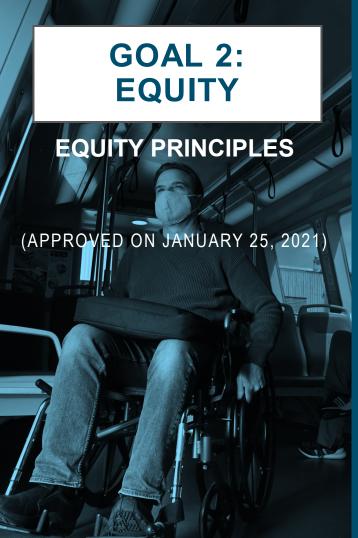
2 **Goal 2: EQUITY**
Advance equity

3 **Goal 3: NETWORK MANAGEMENT & GOVERNANCE**
Identify near-term actions to implement beneficial long-term Network Management & Governance reforms

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

GOAL 2: EQUITY

EQUITY PRINCIPLES

(APPROVED ON JANUARY 25, 2021)

1. 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.

2. 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.

3. 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.

4. 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.

5. 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.

TRANSIT TRANSFORMATION

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.

BLUE RIBBON

TRANSIT RECOVERY
TASK FORCE

ACTION PLAN

Bay Area Transit Ridership (all operators)
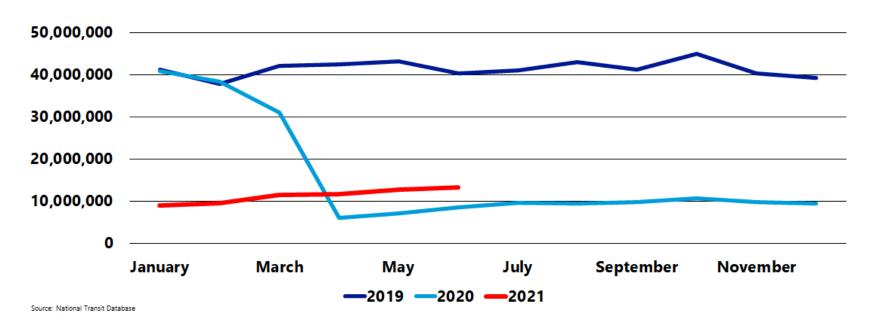
June 2021 Ridership Down 67% from Pre-COVID-19 Levels

Ridership remains depressed from a 2019 average of over 40 million trips per month, to 13 million trips in June 2021. Since June, most operators are reporting continuing increases in ridership.

Source: National Transit Database

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CHALLENGES TOWARDS IMPROVING RIDERSHIP

Customer Experience
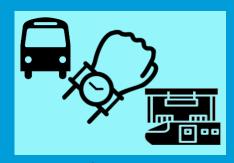
Roadway Congestion Impacts on Transit

Usability
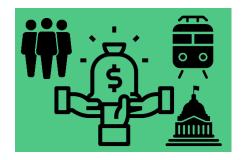
Network Gaps and Connectivity

Organizational and Institutional Challenges

Past and Current Disparities

Costs and Insufficient Funding

10

OUTCOMES

I. Fares and Payment	II. Customer Information	III. Transit Network	IV. Accessibility	V. Funding
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.	Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.	The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

ACTION PLAN KEY ELEMENTS

- Expanded collaboration between transit operators and with partners is essential

- Actions are keyed to Outcomes

- 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

TRANSFORMATION ACTION PLAN:
ACCELERATED ACTIONS

I. FARES AND PAYMENT

Fare Integration Policy

1. Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects, **by December 2021**.

2. Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations **by December 2021**.

3. Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations **by mid-2022**.

II. CUSTOMER INFORMATION

Mapping and Wayfinding

4. Fund and finalize regional mapping and wayfinding standards for application across all operator service areas **by mid-2023**.

5. 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.

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 **by late 2023**.

TRANSFORMATION ACTION PLAN:
ACCELERATED ACTIONS

III. TRANSIT NETWORK

Bus Transit Priority (speed & reliability)

7. Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions **by December 2021**.

8. Sponsor legislation to remove barriers to transit priority implementation **by early 2022**.

9. Fund the design and delivery of prioritized near-term transit corridor projects **by mid-2022**.

10. Select near-term HOV lane operating policies to advance to the State **by mid-2022**.

11. Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way **by late 2022**.

12. 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**.

TRANSFORMATION ACTION PLAN: **ACTIONS**

III. TRANSIT NETWORK

Bus/Rail Network Management Reform

13. Fund and complete a Business Case analysis of potential network management reforms, including resource requirements and implementation steps, by mid-2022.

14. Establish and support an MTC advisory group to guide the Network Management Business Case analysis by October 2021.

15. Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiencies initiatives by December 2021.

16. Deliver Phase 1 Rail Partnership and Governance Assessment grant by late 2021 and Final Assessment by mid-2023.

17. Adopt Transit Equity Principles and a process for applying them by mid-2022.

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 by late 2023.

19. Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local government access plans and policies by late 2023.

Data Collection and Coordination

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

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TRANSFORMATION ACTION PLAN: ACTIONS
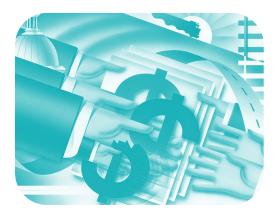
IV. ACCESSIBILITY

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, **by mid-2022**.

22. Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips **by late 2022**.

23. Identify next steps for the full integration of ADA-paratransit services on Clipper Next Generation **by late 2022**.

24. Identify key paratransit challenges and recommend reforms through the Coordinated Plan update **by early 2023**.

25. Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC) **by late 2022**.

V. FUNDING

26. Identify cost-saving efficiencies and Network Management funding needs as part of Business Case analysis **by early 2022**.

27. Convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit **by late 2023**.

NEXT STEPS

BLUE RIBBON

TRANSIT RECOVERY
TASK FORCE

SEPTEMBER 2021

- **Commission to consider acceptance of the Action Plan**

- **Commission establishes Network Management Business Case advisory group**

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OCTOBER 2021 AND BEYOND

- **Transformation Action Plan Implementation**
  - **October Commission workshop:** Provide direction on funding and staff resources needed to implement Action Plan

  - Fund and initiate prioritized Action Plan projects

- **Network Management Business Case**
  - Consultant contract for Network Management Business Case analysis

  - Convene First meeting of Network Management Business Case advisory group

BLUE RIBBON

TRANSIT RECOVERY
TASK FORCE

THANK YOU.

September 8, 2021   **Agenda Item 8**

Plan Bay Area 2050: Implementation Plan Partnerships & Final Steps to Adoption

Subject:

Summary of major findings and considerations from the Partnership Phase of the Implementation Plan as well as final steps for overall Plan Bay Area 2050 finalization, prior to a joint meeting of the Commission and ABAG Executive Board in October to consider Final Plan adoption.

Background:

Policy Advisory Council Agenda Item 8, Plan Bay Area 2050: Implementation Plan Partnerships & Final Steps to Adoption, is attached. This report will be presented to the Joint MTC Planning Committee with the ABAG Administrative Committee meeting on September 10, 2021.

Staff will be at your September 8 meeting to deliver and discuss this presentation. The Council's input is requested.

Issues:

None identified.

Recommendations:

Information.

Attachments:

- Attachment A: Agenda Item 6a from the September 10, 2021 Joint MTC Planning Committee with the ABAG Administrative Committee meeting.

September 10, 2021   Agenda Item 6a

Plan Bay Area 2050: Implementation Plan Partnerships & Final Steps to Adoption

Subject: Summary of major findings and considerations from the Partnership
Phase of the Implementation Plan as well as final steps for overall Plan
Bay Area 2050 finalization, prior to a joint meeting of the Commission
and ABAG Executive Board in October to consider Final Plan adoption.

Background: The release of Draft Plan Bay Area 2050 in spring 2021 kicked off a
series of workshops and public hearings as well as a public comment
period which welcomed participation and input from partners and
stakeholders. The Draft Plan release was also the starting point for the
Partnership Phase of the Plan Bay Area 2050 Implementation Plan. The
purpose of the Partnership Phase was to expand the focus of the
Implementation Plan beyond MTC and ABAG and further develop the
partnerships and commitments needed to advance the plan's 35 strategies.

Implementation Plan Partnership Phase Elements
MTC/ABAG received hundreds of comments related to the Draft Plan
Document, Draft Supplemental Reports, and Draft Environmental Impact
Report (EIR) during the Draft Plan Bay Area 2050 public comment
period from May 26, 2021 to July 20, 2021. Of these, nearly 40 contained
feedback specific to the Draft Implementation Plan, including partnership
commitments, statements of support, highlights of key partner-led
initiatives and suggestions for new or revised implementation actions.

On July 19, 2021, staff held a virtual partner and stakeholder workshop to
request input on how partners can help support plan implementation. This
workshop was well-attended, with approximately 70 individuals
representing over 50 different entities or organizations from a diverse
range of sectors. Starting on May 26, 2021 staff also began holding
virtual one-on-one and small group focused discussions, including virtual
"office hours" for partners from July 27, 2021 through August 13, 2021.
Thirty-plus "office hours" meetings with nearly 40 different entities or
organizations were held, which provided an opportunity to further discuss
feedback provided during the comment period and at the workshop.
Finally, a webinar and Q+A was held Tuesday, August 17, 2021.

Partnership Phase Findings
In August, staff mailed out a packet to policymakers detailing "What We
Heard" on all aspects of Draft Plan Bay Area 2050 during the public
comment period. This feedback along with other summer engagement
input will inform revisions proposed for the Final Play Bay Area 2050,
which the MTC Commission and ABAG Executive Board will consider
for adoption in October.

Input was received on all plan strategies, although there were more requests for revisions and clarifications for Transportation and Environment implementation actions versus Housing and Economy implementation actions. The Partnership Phase saw at least 45 distinct partners offering potential commitments or statements of support to advance plan implementation over the next one-to-five years. Feedback was received from transit agencies, local jurisdictions, county transportation authorities, advocates, non-profits, state agencies, regional agencies, labor representatives, and business community representatives. These partnerships will be essential as MTC/ABAG transitions to plan implementation and advances advocacy, initiatives, and planning activities that will realize the vision and goals of the plan.

Below are select highlights where Partnership Phase discussions and feedback informed revisions proposed for inclusion in the Final Implementation Plan. Additional information on these highlights can also be found in **Attachment A**.

1) **Environment: Sea Level Rise Adaptation** – Staff are proposing to change the MTC/ABAG implementation role for *Strategy EN1: Adapt to Sea Level Rise* from "Lead to "Partner" based upon feedback from environmental non-profits and ongoing coordination discussions with partner regional agencies.
2) **Transportation: Blue Ribbon Transit Recovery Rask Force Work** – The Transformation Action Plan developed by the Task Force, with Commission consideration to accept this month, will be more deeply woven into the Final Implementation Plan based upon input from transit operators and county transportation agencies.
3) **Economy: Workforce Development Needs** – Partnership Phase discussions with labor and business partners revealed new areas of concern related to workforce development. Staff are proposing significant revisions for implementation actions under *Strategy EC2: Expand Job Training and Incubator Programs* to help improve economic mobility as well as enhance coordination with labor and business partners moving forward.
4) **Housing: Anti-Displacement Programs** – Housing and equity advocates as well as some local jurisdictions raised the importance of prioritizing actions that support anti-displacement efforts. Acknowledging the recent $20 million allocation for the Bay Area Housing Finance Authority (BAHFA) from the California state budget, the Final Implementation Plan proposes revisions to clarify the scope of a BAHFA-led pilot project to explore potential regional scale anti-displacement programs.

5) **Tracking Progress: Supporting Accountability** – Partners across various sectors raised the need to track progress and support accountability after plan adoption – an important need given state oversight of plan implementation moving forward. Staff are committing to providing status updates on Implementation Plan progress at least annually starting in 2022 to MTC/ABAG committees and boards.

Key findings from Partnership Phase activities for each plan strategy have also been incorporated into **Attachment B,** *Draft Implementation Briefs (Revised, September 2021)*.

Final Steps Prior to Plan Adoption
In addition to the robust feedback on the Draft Implementation Plan, staff have been thoroughly reviewing the comments received on all Draft Plan Bay Area 2050 deliverables since the end of the public comment period on July 20. Comments received on the Draft EIR will be responded to within the Final EIR, whereas comments received on non-EIR matters are being responded to on a rolling basis. When appropriate, revisions will be made to the Final Plan Document, Final Supplemental Reports, Final Implementation Plan, and Final EIR in advance of next month's release.

Staff anticipates that the Final Plan Bay Area 2050, constituting the components listed above, will be released publicly the week of October 4. Staff will present revisions since the Draft Plan Bay Area 2050 release in spring 2021 to the Regional Advisory Working Group (RAWG), ABAG Regional Planning Committee (RPC), and Policy Advisory Council early next month. Staff will also seek the referral of Final Plan Bay Area 2050 by the Joint MTC Planning Committee with the ABAG Administrative Committee to a special joint Commission and ABAG Executive Board meeting to be held on Thursday, October 21. At that meeting, the two boards will consider Final Plan Bay Area 2050 for adoption, making it the official regional plan until the next update slated for 2025 and concluding the nearly four-year-long planning process.

Should Final Plan Bay Area 2050 be adopted by MTC/ABAG in October, staff would then work with federal and state partners at FHWA, FTA, Caltrans, and CARB to secure their approvals in fall 2021 and winter 2022. Staff would also commence work on Plan implementation activities identified in the Final Implementation Plan, providing annual updates starting next year on implementation progress.

Issues: None identified.

Recommendation: Information

Attachments: Attachment A: Presentation
                      Attachment B: Draft Implementation Plan Briefs (*Revised, September 2021*)

                                                    Therese W. McMillan

PLAN BAY AREA 2050

Implementation Plan Partnership Phase Findings & Final Steps to Adoption

Chirag Rabari and Dave Vautin, MTC/ABAG

September 2021

Implementation Plan: Timeline

Sept-Nov 2020 | Nov-Jan 2021 | Feb-May 2021 | Jun-Aug 2021 | Sept-Oct 2021

Phase 1: Analysis

- Strategy assessment & brainstorming
- Mapping complementary efforts, initiatives and partners

Phase 2: Engagement ⭐

- Nov. committees feedback
- Two virtual stakeholder meetings
- Small group meetings
- Public/CBO outreach

Phase 3: Draft Plan ⭐

- Feb. + Mar. progress update to committees
- Identify opportunities and challenges
- Develop Draft Implementation Plan

Phase 4: Partnerships

- Public outreach & comment period
- Virtual partner & stakeholder workshop
- Focused discussions and small group meetings

Phase 5: Final Plan ⭐

- Sept. progress update to committees
- Develop Final Implementation Plan
- Final Plan release and adoption ✓
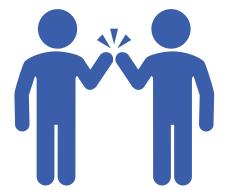
⭐ = Board/Commission input   ✓ = Board/Commission approval

PLAN BAY AREA 2050

2

Implementation Plan: Partnership Phase *(Summer)*

- **The Partnership Phase expanded the focus beyond MTC/ABAG** to help identify a broader range of actions, complementary initiatives, and potential commitments for incorporation into the Final Implementation Plan.

- **Partnership Phase elements included:**
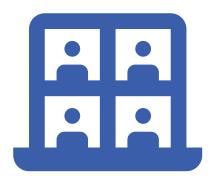
Virtual workshop for partners & stakeholders *(Monday, July 19)*

Comment period *(Late May through July 20)*

One-on-ones and small group **focused discussions** *(May 26 to August 13)*
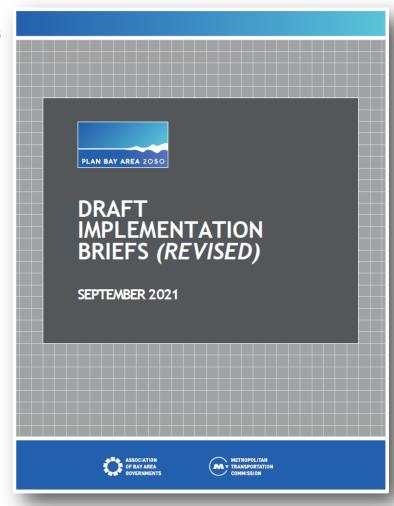
Webinar + Q&A *(Tuesday, August 17)*

PLAN BAY AREA 2050

Implementation Plan: Feedback from Partners
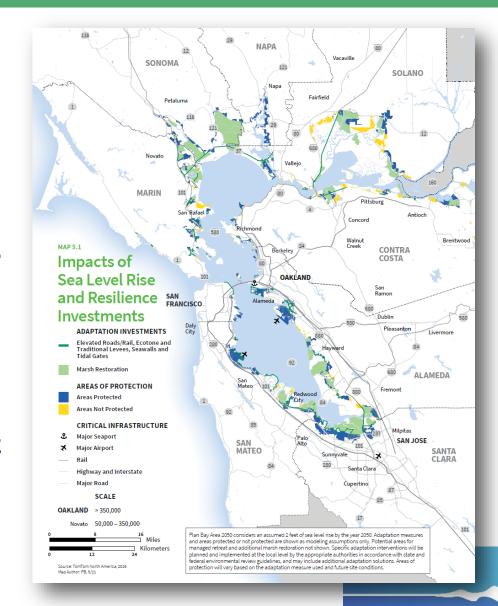
- **Staff sought feedback on the Draft Implementation during the Plan Bay Area 2050 public comment period**; combined with other summer engagement input, this will inform the Final Plan Bay Area 2050 to be considered for adoption in October.

- **Input was received on all plan strategies,** although there were more requests for revisions and clarifications for Transportation and Environment implementation actions versus Housing and Economy implementation actions

- **Key Partnership Phase findings for each plan strategy** have been incorporated into **Attachment B** in your packet, *Draft Implementation Briefs (Revised)*.

- **The focus of today's presentation will be on five select topic areas** where partnership discussions and feedback informed significant proposed Implementation Plan revisions, including:

  1. Sea level rise adaptation
  2. Blue Ribbon Transit Recovery Task Force work
  3. Workforce development needs and opportunities
  4. Housing and anti-displacement programs
  5. Tracking progress of Plan implementation

PLAN BAY AREA 2050

DRAFT IMPLEMENTATION BRIEFS *(REVISED)*

SEPTEMBER 2021

ASSOCIATION OF BAY AREA GOVERNMENTS   METROPOLITAN TRANSPORTATION COMMISSION

4

Environment: Sea Level Rise Adaptation

- Based upon feedback received during the Partnership Phase from environmental non-profits and regional agencies, **staff are proposing to change the MTC/ABAG implementation role** for *Strategy EN1: Adapt to Sea Level Rise* from "Lead" to "Partner".

- **This will better reflect the multi-sectoral and multi-disciplinary nature** of sea level rise adaptation work and strengthen the alignment with the BCDC-led Bay Adapt process, which identifies specific actions for MTC/ABAG to advance.

- **The Final Implementation Plan will further highlight key partner-led efforts**, including those by BARC, BCDC, and the San Francisco Estuary Partnership, among others.

MAP 5.1
Impacts of Sea Level Rise and Resilience Investments

ADAPTATION INVESTMENTS
- Elevated Roads/Rail, Ecotone and Traditional Levees, Seawalls and Tidal Gates
- Marsh Restoration

AREAS OF PROTECTION
- Areas Protected
- Areas Not Protected

CRITICAL INFRASTRUCTURE
- ⚓ Major Seaport
- ✈ Major Airport
- Rail
- Highway and Interstate
- Major Road

SCALE
OAKLAND > 350,000
Novato 50,000 – 350,000

0 8 16 Miles
0 12 24 Kilometers

Source: TomTom North America, 2019
Map Author: PB, 6/21

Plan Bay Area 2050 considers an assumed 2 feet of sea level rise by the year 2050. Adaptation measures and areas protected or not protected are shown as modeling assumptions only. Potential areas for managed retreat and additional marsh restoration not shown. Specific adaptation interventions will be planned and implemented at the local level by the appropriate authorities in accordance with state and federal environmental review guidelines, and may include additional adaptation solutions. Areas of protection will vary based on the adaptation measure used and future site conditions.

For more information on proposed Implementation Plan revisions for Strategy EN1, please see Attachment B.

PLAN BAY AREA 2050

Transportation: Transit Recovery Task Force

- **Transportation partners identified during the Partnership Phase that more clarity was needed** regarding the alignment of the Plan Bay Area 2050 Implementation Plan with the work of the Blue Ribbon Transit Recovery Task Force.

- **Concurrently, the Transformation Action Plan released in July included 27 recommendations**, including integration policy, mapping and wayfinding, bus transit priority, and more.

- **Blue Ribbon recommendations will be more deeply woven into the Final Implementation Plan**, generally nesting under existing transportation strategies under the themes of *Maintain and Optimize the Existing System* and *Build a Next-Generation Transit Network*.

For more information on proposed Blue Ribbon-related Implementation Plan revisions, please see Attachment B.

Economy: Workforce Development Needs

- **Partnership Phase discussions revealed new concerns from a range of economic stakeholders** related to workforce development.

- **Both labor and business organization identified challenges in this area,** with labor seeking to ensure an adequately sized and skilled construction workforce and business flagging concerns on staff shortages and skill gaps.

- **The Final Implementation Plan proposes significant revisions to actions** under *Strategy EC2: Expand Job Training and Incubator Programs*:

  - Emphasize the importance of apprenticeship opportunities and high-road career opportunities, including construction, through regional advocacy efforts

  - Propose enhanced collaboration with both labor and business on regional modeling of workforce supply factors moving forward
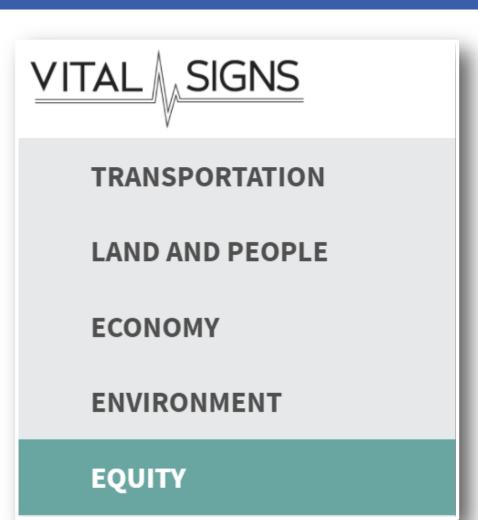
PLAN BAY AREA 2050

Housing: Anti-Displacement Programs

- **Housing and equity advocates, as well as some local jurisdictions,** raised the importance of prioritizing implementation actions that will support anti-displacement efforts.

- **The recently-approved California state budget included a $20 million allocation to stand up the Bay Area Housing Finance Authority (BAHFA)**; this allocation will help accelerate proposed pilot projects included in the Draft Implementation Plan.

- **The Final Implementation Plan proposes revisions in multiple housing areas**, including a BAHFA-led action to launch a pilot project which will develop standardized best practices for tenant protection programs and scope potential regional-scale anti-displacement programs.

For more information on proposed Implementation Plan revisions for the plan's housing strategies, please see Attachment B.

PLAN BAY AREA 2050

Tracking Progress: Supporting Accountability
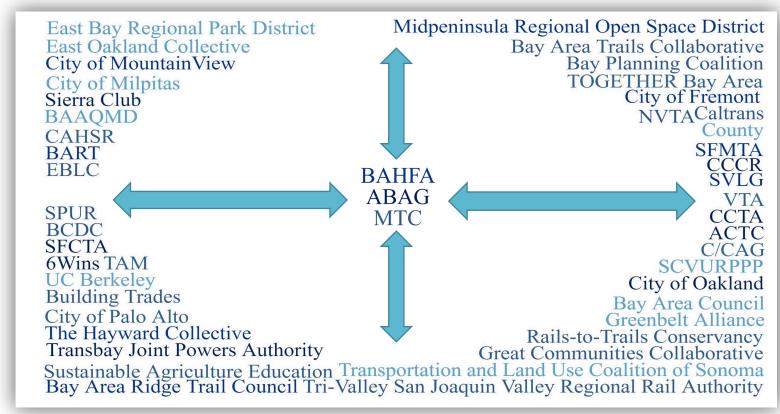
- **Partners across various sectors spoke of the need to track progress** and support accountability after plan adoption - an important need given state oversight of Plan implementation going forward.

- **In the Final Implementation Plan, staff are committing to providing status updates and progress reports** at least annually starting in 2022 to MTC/ABAG's committees & boards.

- **Staff also propose building upon the robust performance tracking work in Vital Signs**, the regional performance monitoring initiative, as a tool to more effectively gauge Plan Bay Area 2050 implementation progress.

VITAL SIGNS

TRANSPORTATION

LAND AND PEOPLE

ECONOMY

ENVIRONMENT

EQUITY

PLAN BAY AREA 2050

Partnership: The Key to Implementation Success

- **The Partnership Phase saw at least 45 distinct partners** offering potential commitments or statements of support to advance implementation over the next 1-5 years, across all plan strategies.

- **MTC/ABAG staff are grateful for the dedication partners have shown** throughout the four-year planning process and look forward to continued collaboration.

- **Partnership will be critical as we transition to Plan implementation** and push forward with the advocacy, initiatives, projects and planning activities that will make Plan Bay Area 2050 a reality.

East Bay Regional Park District
East Oakland Collective
City of MountainView
City of Milpitas
Sierra Club
BAAQMD
CAHSR
BART
EBLC

SPUR
BCDC
SFCTA
6Wins TAM
UC Berkeley
Building Trades
City of Palo Alto
The Hayward Collective
Transbay Joint Powers Authority
Sustainable Agriculture Education
Bay Area Ridge Trail Council

BAHFA
ABAG
MTC

Midpeninsula Regional Open Space District
Bay Area Trails Collaborative
Bay Planning Coalition
TOGETHER Bay Area
City of Fremont
NVTA Caltrans
County
SFMTA
CCCR
SVLG
VTA
CCTA
ACTC
C/CAG
SCVURPPP
City of Oakland
Bay Area Council
Greenbelt Alliance
Rails-to-Trails Conservancy
Great Communities Collaborative
Transportation and Land Use Coalition of Sonoma
Tri-Valley San Joaquin Valley Regional Rail Authority

PLAN BAY AREA 2050

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Image Source: Marin Headlands (Flickr/Jeff)

PLAN BAY AREA 2050

Final Steps to Plan Adoption

What's Next for October?

Comments & Responses

- In addition to feedback on partnership opportunities for the Final Implementation Plan, MTC/ABAG staff are **actively reviewing hundreds of additional emails and letters submitted prior to the close of the comment period on July 20th**.

- **Draft EIR comments received will be responded to within the Final EIR;** comments received on non-EIR matters are being responded to on a rolling basis.

- **When appropriate, revisions will be made to the Plan Bay Area 2050** Final Document, Final Supplemental Reports, Final Implementation Plan, and Final EIR as part of next month's release.

PLAN BAY AREA 2050

Considering Final Plan Bay Area 2050 for Adoption

Public Release of Final Plan
- Anticipated no later than the week of October 4th
- Includes Final Plan Document, Final Implementation Plan, Final Supplemental Reports, and Final EIR

Stakeholder & Public Presentations
- Regional Advisory Working Group
- MTC Policy Advisory Council
- ABAG Regional Planning Committee

Committees & Boards to Consider Adoption
- Joint MTC Planning/ABAG Administrative Committee (October 8th)
- Joint Commission/ABAG Executive Board Meeting (October 21st)

Submission for Federal/State Approval*
- California Air Resources Board (CARB)
- Federal Highway Administration (FHWA) & Federal Transit Administration (FTA)
- Caltrans

Plan Implementation
- Already underway with additional initiatives slated to kick off in early 2022
- Annual updates to Joint MTC Planning/ABAG Administrative Committee on progress

* If adopted, Final Plan Bay Area 2050 would be submitted to federal & state partners no later than November 2021, with final approvals anticipated from all federal & state agencies no earlier than winter 2022.

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PLAN BAY AREA 2050

Questions or Comments?

Staff Contacts:

Chirag Rabari, crabari@bayareametro.gov
Dave Vautin, dvautin@bayareametro.gov

PLAN BAY AREA 2050

PLAN BAY AREA 2050

DRAFT IMPLEMENTATION PLAN BRIEFS (REVISED)

SEPTEMBER 2021

ASSOCIATION
OF BAY AREA
GOVERNMENTS

METROPOLITAN
TRANSPORTATION
COMMISSION

Draft Plan Bay Area 2050: Implementation Plan Briefs

Revised – September 2021

Association of Bay Area Governments
375 Beale Street, Suite 700
San Francisco, CA 94105-2066
www.abag.ca.gov | 415.820.7900

Metropolitan Transportation Commission
375 Beale Street, Suite 800
San Francisco, CA 94105-2066
www.mtc.ca.gov | 415.778.6700

Table of Contents

Introduction

The purpose of the Plan Bay Area 2050 Implementation Plan is to develop short-term, tangible actions that the Metropolitan Transportation Commission (MTC), the Association of Bay Area Governments (ABAG), and partners can take over the next one-to-five years to advance the 35 strategies identified through the Plan Bay Area 2050 Final Blueprint. The Implementation Plan chapter of the Draft Plan Bay Area 2050 (see Chapter 7: Implementation Plan) covers a range of relevant topics, including the Implementation Plan's goals and objectives; engagement conducted with partners and the public; the results of a four-factor strategy assessment; implementation role recommendations; draft implementation priorities and actions for the plan's four elements, organized by the plan's eleven key themes; and strategic partnership opportunities.

Brief Components

The purpose of these Implementation Plan briefs is to allow partners and stakeholders to explore each of the plan's 35 long-range strategies in detail. To facilitate this deeper dive, a one- or two-page consolidated brief is provided for each strategy and includes several components listed below.

Plan Element and Theme

Each plan strategy falls into one of the four core elements of the Plan — transportation, housing, the economy or the environment — and nests under one of eleven identified themes.

Strategy Cost

This details the lifecycle cost of the strategy, in year-of-expenditure dollars, regardless of the implementing organization (local, regional, state).

Abbreviated Strategy Description

The description provides the short-form descriptive details associated with the strategy.

> *Key icon to identify strategies that align with the plan's climate requirements:*
>
> = High-Impact Strategy in Achieving Greenhouse Gas Reduction Target

Strategy Success Assessment

The assessment provides ratings along four key factors that reflect qualitative consensus assessments from staff, partners, stakeholders and policymakers. The assessment focuses on current conditions with respect to MTC and/or ABAG's authority, financial resources and technical capacity, as well as public and/or political support.

Strategy Success Factor Definitions

- **Authority**
  The assignment to carry out the strategies and attendant tasks involved; generally established through legislation or other legal means.
- **Financial Resources**
  Funding in the amounts, and with the requisite control and stability, required to carry out strategies associated with vested authority.
- **Technical Capacity**
  The institutional "wrap around" of knowledge, staffing, process and procedure required to implement strategies.

- **Public and Political Support**
  While less quantifiable than the other elements, this element is a critical prerequisite for accessing the other three.

Assessment Ratings of Current Conditions

- **Limited**
  No or little authority, financial resources and/or technical capacity exist within MTC/ABAG to carry out the strategy effectively, efficiently and equitably. Public and political support is limited.
- **Partial**
  Authority, financial resources and/or technical capacity are partially present within MTC/ABAG, but not at a sufficient level to carry out the strategy effectively, efficiently and equitably. Public and political support is mixed.
- **Existing**
  Authority, financial resources and/or technical capacity exist within MTC/ABAG and the strategy can be carried out with a high degree of effectiveness, efficiency and equity. The strategy has a high degree of public and political support.

MTC/ABAG Implementation Role

Implementation roles reflect consensus recommendations based on feedback from staff, partners, stakeholders and policymakers regarding MTC's/ABAG's proposed role in strategy implementation. Recommendations are forward-looking and may therefore be aspirational. In addition, this initial recommendation may be thought of as an overall strategic orientation to implementation; actual roles for future, specific implementation actions may vary.

- **Lead**
  MTC/ABAG already has, or should work to secure, significant elements of all four strategy success factors (authority, financial resources, technical capacity, public/political support). It should be noted that taking a lead role does not mean leading alone — this may involve serving as a coalition leader, champion, chief advocate or catalyst.
- **Partner**
  MTC/ABAG already has, or should work to secure, some — but not all — of the four strategy factors. MTC/ABAG may have various implementation responsibilities for a given a strategy, but the strategy's ultimate success will depend upon leadership from and partnership with other entities with their own attendant resources and capacities.
- **Support**
  MTC/ABAG does not have, and is not in the best position to secure, significant elements of the four factors defined under strategy success requirements. MTC/ABAG may have certain specific and clearly defined implementation responsibilities and may still play a role in securing public and political support for the strategy or contributing knowledge/expertise to partner initiatives; however, ultimate strategy implementation will be led by other entities.

Recommended MTC/ABAG Implementation Actions

Implementation actions reflect high-priority actions to advance the strategy, as developed by staff, partners and stakeholders, and incorporating feedback from policymakers. These actions are grouped into three broad categories: *Advocacy & Legislation*; *New, Existing or Restructured Initiatives*; or *Planning or Research.*

Implementation actions are focused on draft actions that MTC/ABAG are proposing to commit to, generally in collaboration with select strategic partners who are identified at a broad level for each plan strategy. Please note that the list of partners for any strategy is not intended to be exhaustive and additional partners may be engaged as implementation activities and initiatives move forward. The briefs also identify a proposed timeframe over a five-year implementation period for each action, where Year 1 describes in-progress or about-to-commence work in 2021 and Year 5 is 2025.

For the purposes of these briefs, "MTC/ABAG Implementation Actions" may encompass affiliated MTC/ABAG entities such as the Bay Area Housing Finance Authority (BAHFA), the Bay Area Toll Authority (BATA), the Bay Area Regional Energy Network (BayREN), the Bay Area Regional Collaborative (BARC), or the San Francisco Estuary Partnership (SFEP). These entities are identified where appropriate, depending on the plan element and specified action.

Summary and Considerations

The summary provides additional contextual details regarding the assessment, role recommendation and implementation actions, as well as policy and strategy issues for consideration moving forward into the plan's implementation period. If applicable, key findings from the Implementation Plan Partnership Phase, which occurred over summer 2021, are presented and, where appropriate, select partner initiatives that support strategy goals and implementation are also highlighted.

Cross-Cutting Implementation Actions

These briefs provide proposed implementation actions at a strategy level for each of the adopted 35 strategies included as part of the Draft Plan Bay Area 2050. However, there are several key actions which will support multiple strategies and even multiple elements of the plan. These "cross-cutting" implementation actions are identified here.

Implementation Vehicle	"Cross-Cutting" Implementation Actions	Timeframe
Advocacy and Legislation	Advocate for reforms to Senate Bill 375 and/or associated State guidelines to support improved policy outcomes with respect to reducing greenhouse gas emissions and facilitate enhanced collaboration at all levels of government in meeting shared climate goals	Years 1-2
New, Existing or Restructured Initiatives	Update the framework and methodology for identification of Equity Priority Communities	Years 2-3
Planning or Research	Provide Implementation Plan status updates and progress reports annually starting in 2022 to MTC/ABAG's committees & boards with the goal of refreshing the Implementation Plan as part of the next Plan Bay Area update process in 2025	Ongoing
	Build upon the robust performance tracking work in Vital Signs, the regional performance monitoring initiative, as a tool to more effectively gauge Plan Bay Area 2050 implementation progress	Ongoing

Strategy H1: **Further strengthen renter protections beyond state law**

Strategy Cost	$2 billion
Abbreviated Strategy Description	Building upon recent tenant protection laws, limit annual rent increases to the rate of inflation, while exempting units less than 10 years old.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Advocate** for renter protections for tenants and low-income communities to prevent unjust evictions and displacement	Ongoing	Equity and Environmental Advocates/Non-Profits; Housing Developers; Local Jurisdictions; State Agencies
New, Existing or Restructured Initiatives	**Launch and deliver** a BAHFA pilot project to develop standardized best practices for tenant protection programs and scoping potential regional-scale anti-displacement programs	Years 2-4	
Planning or Research	**Complete and implement** the Expanded Regional Housing Portfolio and BAHFA Business Plan	Years 1-2	

Strategy H1: **Further strengthen renter protections beyond state law**

Summary and Considerations

The agencies do not have authority to enact legislation; however, BAHFA will have authority to implement programs for renter services, if and when funding is secured. Large-scale resources are not currently available but could become available by ballot measure or state/federal appropriation. There is not sufficient technical capacity to support full-scale implementation of this strategy at the moment, but additional capacity could be built if appropriately resourced. This strategy is generally well-supported although there is some opposition from segments of the real estate industry. Furthermore, a recent statewide ballot initiative on rent control was not approved by voters.

This is an area, however, that experienced a deeper commitment from government partners at all levels during the pandemic, with eviction moratoria at the federal, state and local levels and strengthened renter protections in select localities. The recently-approved California state budget also included a $20 million allocation for BAHFA; this allocation will help accelerate the delivery of pilot projects included in the Implementation Plan.

Additional topics for consideration with key partners during the implementation period may include how to develop the financial resources needed to support expanded services and strengthened enforcement, as well as how to generate the additional public and political support for strengthened statewide renter protections.

Strategy H2: **Preserve existing affordable housing**

Strategy Cost

$237 billion

Abbreviated Strategy Description

Acquire homes currently affordable to low- and middle-income residents for preservation as permanently deed-restricted affordable housing.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited *Partial* *Existing*

MTC/ABAG Implementation Role

Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** for affordable housing preservation	Ongoing	Equity and Environmental Advocates/Non-Profits;

Housing Developers;

Local Jurisdictions;

State Agencies |
New, Existing, or Restructured Initiatives	**Launch and deliver** a BAHFA pilot program to pursue new affordable housing preservation strategies, including the restructured Bay Area Preservation Pilot Program	Years 2-4	
Planning or Research	**Complete and implement** the Expanded Regional Housing Portfolio and BAHFA Business Plan	Years 1-2	
	Evaluate changes to federal and state policies to increase incentives for, and viability of, affordable housing preservation strategies	Ongoing	

Strategy H2: **Preserve existing affordable housing**

Summary and Considerations

BAHFA has authority to engage in housing preservation via its establishing legislation, although it is unlikely the agency would acquire properties on its own. Most likely, BAFHA would act as a funding partner to developers, invest in strengthening the ecosystem of preservation practitioners and work to convene stakeholders. Financial resources and technical capacity are contingent upon securing significant new resources. Close partnership with local jurisdictions and counties will be essential in determining how best to move forward with a regional affordable housing preservation strategy. That said, there is a major opportunity for BAHFA to provide regional leadership in this space, which is a key plank of the "3 P's" housing framework (Production, Protection, Preservation), with a specific focus on developing new sources of funding — including consideration of a regional revenue measure at the earliest feasible moment. Key considerations moving forward into the implementation period may include continued discussion of future advocacy opportunities to support low- and middle-income tenants, as well as community-based organizations and further evaluation of cross-cutting resilience considerations such as the impacts of sea level rise on housing preservation approaches.

Beyond the regional level, partners are also exploring their own preservation strategies and approaches. The City of Oakland, for example, is exploring a new local housing and infrastructure bond that may include preservation of existing affordable housing. As a regional housing preservation strategy is developed through the Expanded Regional Housing Portfolio Business Plan, and as BAHFA launches preservation pilot projects supported by a recent $20 million allocation from the California state budget, it will be critical for local partners to also continue pursuing context-specific preservation approaches as well.

Strategy H3: Allow a greater mix of housing densities and types in Growth Geographies

Strategy Cost   N/A

Abbreviated Strategy Description   Allow a variety of housing types at a range of densities to be built in Priority Development Areas (PDAs), select Transit-Rich Areas (TRAs), and select High-Resource Areas (HRAs).

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Advocate** for legislation that enables a greater mix of housing densities and types in Growth Geographies	Ongoing	Business Community; Equity and Environmental Advocates/Non-Profits; Housing Developers; Local Jurisdictions; CTAs; State Agencies; Transit Operators
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs**, including financial resources and technical assistance through the Regional Housing Technical Assistance (RHTA) Program and the PDA Planning and Technical Assistance Grant programs, as well as eligible new funding sources, with a goal of providing capacity-enhancing support for local jurisdictions	Ongoing	
	Assist local jurisdictions to complete or initiate plans for all remaining PDAs by 2025	Ongoing	
	Complete and implement the Transit-Oriented Development (TOD) Policy Update to ensure land use supports transit investments and access to transit	Years 1-2 (policy update); Ongoing thereafter	

Strategy H3: **Allow a greater mix of housing densities and types in Growth Geographies**

Summary and Considerations

The agencies have no authority over local land use, zoning and entitlements. This is an area where the state and local jurisdictions have authority to make changes; however, the agencies do have the Regional Housing Technical Assistance, PDA Planning Grants and PDA Technical Assistance programs to provide funding and technical assistance to local jurisdictions. These programs will support local jurisdictions with developing Specific Plans and Housing Elements that expand housing opportunities at all income levels in PDAs and other Growth Geographies. Assistance may include the identification of best practices or the delivery of customized model policies, such as objective design standards and Housing Element implementation programs. Public support may be a challenge in select locations, although there is generally strong support in public polling, as well as from relevant policy boards. Close collaboration and partnership with the state, local jurisdictions and counties will be essential to the strategy's success.

There are also a number of ongoing developments at both the state and local level that could support a greater mix of housing densities and types in Growth Geographies. Senate Bill (SB) 10, for example, is under consideration at the state level and makes it easier for cities to zone for smaller, lower-cost housing developments of up to 10 units in transit-rich areas or urban infill sites. At the local level, the City of Berkeley adopted a resolution calling for the end of exclusionary zoning by 2022 – one of several actions being undertaken by local jurisdictions which could have significant impacts on housing production in Growth Geographies.

Strategy H4: Build adequate affordable housing to ensure homes for all

Strategy Cost	$219 billion
Abbreviated Strategy Description	Construct enough deed-restricted affordable homes necessary to fill the existing gap in housing for the unhoused community and to meet the needs of low-income households.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** for affordable housing production and explore better coordination of existing funding streams	Ongoing	Business Community; Equity and Environmental Advocates/Non-Profits; Housing Developers; Labor; Local Jurisdictions; State Agencies
New, Existing or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs,** including financial resources and technical assistance through the Regional Housing Technical Assistance Program and the PDA Planning and Technical Assistance Grant programs, as well as eligible new funding sources, with a goal of supporting jurisdictions with plans and policies to increase the supply of affordable homes	Ongoing	
	Launch and deliver BAHFA pilot projects to facilitate production and ensure equitable access to affordable housing, including a regional affordable housing application platform ("Doorway") and an affordable housing pipeline database	Years 2-4	
Planning or Research	**Complete and implement** the Expanded Regional Housing Portfolio and BAHFA Business Plan	Years 1-2	
	Evaluate changes to federal and state policies to increase incentives for and the viability of affordable housing production strategies	Ongoing	

Strategy H4: **Build adequate affordable housing to ensure homes for all**

Summary and Considerations

Although BAHFA has statutory authority to fund new affordable housing, it is unlikely to directly build housing and would more likely work as a funding partner to developers and act to convene stakeholders. Financial resources and technical capacity are contingent upon securing new resources. Public support may be a challenge in specific places depending on the location of potential new housing, but polling shows majority support, in addition to strong support from relevant policy boards. BAHFA's potential funding role would be essential to the implementation of this strategy, which is a key plank of the 3Ps housing framework, including consideration of a regional revenue measure at the earliest feasible moment. Ultimate success will depend on partnership across multiple sectors — particularly with jurisdictions that have entitlement authority over specific housing projects, as well as the federal and state governments given their role in affordable housing finance.

Strategy H5: Integrate affordable housing into all major housing projects

Strategy Cost — N/A

Abbreviated Strategy Description — Require a baseline of ten to twenty percent of new market-rate housing developments of five units or more to be affordable to low-income households.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role — Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs,** including financial resources and technical assistance through the Regional Housing Technical Assistance Program, as well as the PDA Planning and Technical Assistance Grant programs, to enable local governments to develop context-specific inclusionary zoning and affordable housing incentives	Ongoing	Equity and Environmental Advocates/Non-Profits; Housing Developers; Local Jurisdictions

Strategy H5: **Integrate affordable housing into all major housing projects**

Summary and Considerations

The agencies have no authority over local inclusionary laws. Translating this strategy from the regional to local level requires additional analysis and evaluation of policies such as density bonuses that can complement inclusionary requirements. The agencies could potentially help identify best practices or do preliminary sub-regional assessments; however, changes to state inclusionary law may require jurisdictions to do their own nexus studies if they pass inclusionary requirements over 15 percent. It is a relatively popular strategy, although there is strong opposition from builders and some unions. Technical capacity could be further strengthened with additional resources.

This is therefore an area where leadership from local partners will be necessary to support strategy implementation progress. The City of Oakland, for example, is currently in the process of updating its affordable housing impact fee and on-site inclusionary zoning requirements. Other jurisdictions in the region are exploring similar updates.

Strategy H6: **Transform aging malls and office parks into neighborhoods**

Strategy Cost   N/A

Abbreviated Strategy Description

Permit and promote the reuse of shopping malls and office parks with limited commercial viability as neighborhoods with housing at all income levels.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs,** including financial resources and technical assistance through the Regional Housing Technical Assistance Program and PDA Planning and Technical Assistance Grant programs, as well as eligible new funding sources, to promote planning and redevelopment of malls and office parks in PDAs and other Growth Geographies	Ongoing	Business Community; Local Jurisdictions; Housing Developers; State Agencies
Planning or Research	**Identify** redevelopment opportunities and challenges and partner with local jurisdictions, community members, property owners, affordable housing developers and other stakeholders to accelerate the redevelopment of aging malls and office parks	Years 2-5	

Strategy H6: **Transform aging malls and office parks into neighborhoods**

Summary and Considerations

The agencies have no authority over local land use, zoning and entitlements; however, MTC/ABAG does have the Regional Housing Technical Assistance Program and the PDA Planning Grants and PDA Technical Assistance programs to provide financial resources and technical assistance. Furthermore, staff is currently developing best practices on rezoning. Key considerations for this upcoming effort to identify redevelopment opportunities and challenges for aging malls and office parks include: 1) how to best connect and coordinate property owners, cities, impacted community members, funders, affordable housing developers, special districts and service (i.e., infrastructure) providers to plan and execute projects, and 2) how to build up even greater public and political support for the strategy given local revenue and local community impacts.

Strategy H7: **Provide targeted mortgage, rental and small business assistance to Equity Priority Communities**

Strategy Cost $10 billion

Abbreviated Strategy Description Provide assistance to low-income communities and communities of color to address the legacy of exclusion and predatory lending, while helping to grow locally owned businesses.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** for rental, mortgage and small-business assistance programs	Ongoing	Business Community; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies
New, Existing, or Restructured Initiatives	**Launch and deliver** BAHFA pilot projects that will focus on developing standardized best practices for tenant protection programs and scoping potential regional-scale anti-displacement programs	Years 2-4	
	Partner with local jurisdictions and other stakeholders through BAHFA to develop and roll out a regional homelessness prevention system	Years 1-4	
Planning or Research	**Complete and implement** the Expanded Regional Housing Portfolio and BAHFA Business Plan	Years 1-2	

Strategy H7: **Provide targeted mortgage, rental and small business assistance to Equity Priority Communities**

Summary and Considerations

BAHFA has statutory authority to fund these programs, though it most likely would provide grants to existing service providers. BAHFA pilot programs have been approved by policymakers to coordinate, and eventually fund, service providers and jurisdictions; a recent allocation by the California state budget will help launch this pilot. Financial resources and technical capacity are contingent on securing new revenues. This strategy is very popular with both tenants and landlords, developers and banks. There is also a major opportunity for BAHFA to provide regional leadership in this space, which is one of the key planks of the 3Ps housing framework, with a focus on developing new sources of funding that includes anti-displacement and homelessness prevention services as eligible expenses.

More broadly, it will be important to track and align with the work of key regional partners, such as the Regional Impact Council, a roundtable of stakeholders from all 9 Bay Area counties aimed at tackling regional housing insecurity and the homelessness crisis.

Finally, this area saw significant commitment from federal government over the course of the pandemic, with multiple rounds of rental assistance approved – although there were significant implementation challenges with the disbursal of this funding. Exploring how BAHFA and the regional agencies could potentially play a role here will be an additional topic of consideration during the implementation period.

Strategy H8: **Accelerate reuse of public and community-owned land for mixed-income housing and essential services**

Strategy Cost   N/A

Abbreviated Strategy Description   Help public agencies, community land trusts and other non-profit landowners to accelerate development of mixed-income affordable housing.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs,** including financial resources and technical assistance through the Regional Housing Technical Assistance Program, the PDA Planning Grants and PDA Technical Assistance programs, as well as eligible new funding sources, to plan for public land reuse and to advance residential and mixed-use projects with a large share of affordable housing	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Housing Developers; Local Jurisdictions; State Agencies; Transit Operators
Planning or Research	Advance an initiative identifying challenges and opportunities for catalyzing the reuse of public- and community-owned land by partnering with local jurisdictions, community members, public land owners, community land trusts and a broad range of other stakeholders	Years 2-5	

Strategy H8: Accelerate reuse of public and community-owned land for mixed-income housing and essential services

Summary and Considerations

Authority already exists to establish and coordinate a voluntary, or "opt-in," network of local governments and partner organizations. Such a network could be established with existing resources, although significant new resources would be required to expand its capacity. Based upon public engagement during Plan Bay Area 2050, this is generally a popular strategy, although there may be resistance in specific locations — pointing to the benefits of an opt-in program. Some technical capacity exists internally although there are gaps with respect to real estate expertise. An initiative focused on identifying challenges and opportunities to advancing local and regional reuse will engage with a broad cross-section of partners. This effort would likely include discussion of the vision and potential path forward for the establishment of a regional public lands network, as well as discussion of how best to improve the housing finance tools available to non-profit developers, local governments, and community-based organizations.

Strategy EC1: **Implement a statewide universal basic income**

Strategy Cost	$205 billion
Abbreviated Strategy Description	Provide an average $500 per month payment to all Bay Area households to improve family stability, promote economic mobility and increase consumer spending.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Advocate** for a potential statewide pilot program related to a universal basic income	Years 3-5	Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies

Strategy EC1: **Implement a statewide universal basic income**

Summary and Considerations

Authority, financial resources, and technical capacity are major challenges for this strategy. Although there has been increasing support for cash transfer strategies in recent years — particularly in a post-COVID environment where essential workers have been heavily impacted — it is likely that political viability will depend on the presence of a broad statewide coalition to advocate for basic income.

MTC/ABAG would be best positioned to take a support role alongside stakeholders including other regions and higher levels of government, with a focus on advocating for the testing and implementation of a statewide universal basic income (UBI) pilot program over the next one-to-five years. Statewide conversations determining what a UBI pilot should look like will be critical. To that end, the most recently approved California state budget included $35 million over five years to pay for UBI pilot programs. Prior to this allocation, several Bay Area jurisdictions had been independently considering UBI test programs as well, including Oakland, San Francisco, South San Francisco, Marin County and Santa Clara County.

Strategy EC2: **Expand job training and incubator programs**

Strategy Cost $5 billion

Abbreviated Strategy Description Fund assistance programs for establishing a new business, as well as job training programs, primarily in historically disinvested communities.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Support increased funding** for job training and incubator programs	Years 3-5	Business Community; Equity and Environmental Advocates/Non-Profits; Labor; Local Jurisdictions; State Agencies
	Advocate for the importance of apprenticeships and high-road career opportunities, including construction, to improve economic mobility and support the plan's ambitious transportation, housing and resilience infrastructure goals	Years 2-5	
New, Existing, or Restructured Initiatives	**Implement** the recommendations of MTC/ABAG's Regional Governmental Partnership for Local Economic Rebound initiative	Years 2-5	
Planning or Research	**Partner** with regional economy stakeholders, including labor, business, and education partners, on research and modeling of workforce supply challenges facing the region and megaregion	Years 2-4	

Strategy EC2: **Expand job training and incubator programs**

Summary and Considerations

Authority, financial resources and technical capacity are major challenges for this strategy, which nonetheless has strong public and political support. Given MTC's/ABAG's lack of technical expertise with respect to job training programs, it is anticipated that MTC/ABAG will take a support role in strategy implementation.

It is important to note, however, that Implementation Plan Partnership Phase discussions revealed new workforce development concerns from several stakeholders. Both labor and business organizations identified challenges in this area, with labor seeking to ensure an adequately sized and skilled construction workforce and business flagging concerns on staff shortages and skill gaps. The Final Implementation Plan has therefore recommended new workforce actions aimed at supporting the plan's ambitious transportation, housing and resilience infrastructure goals as well as enhanced collaboration on regional and megaregional economic needs with labor, business and education partners, among others, moving forward.

Beyond MTC and ABAG, there are a number of ongoing initiatives at the state and local level which support the broad goals of improving economic mobility through workforce development. For example, the California Workforce Development Board's High Road Training Partnerships initiative established a workforce development framework that is industry-based and worker-centered. This training partnership initiative has been supported by funds from a range of sources, including federal Coronavirus Aid, Relief, and Economic Security Act (CARES Act) funding as well as Greenhouse Gas Reduction Funds through the California Climate Investment program. At the local level, the City of Fremont recently announced the "Earn and Learn Fremont" pilot program, which offers participants pathways to new careers in advanced manufacturing.

In summer 2021, MTC and ABAG also launched a new joint initiative called the Regional Governmental Partnership for Local Economic Rebound. The initiative explored how MTC and ABAG can bring a regional "value add" to a larger regional economic recovery strategy; it included elements such as infrastructure delivery as stimulus, as well as a leadership "listening tour" of local government, private sector, and labor partners to better understand recovery needs across the region. Findings and recommendations from this initiative are expected to be available later in 2021.

Strategy EC3: **Invest in high-speed internet in underserved low-income communities**

Strategy Cost
$10 billion

Abbreviated Strategy Description
Provide direct subsidies and construct public infrastructure to ensure all communities have affordable access to high-speed internet.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role
Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Advocate** for continued federal and state support for internet subsidies and a more deliberate state approach to expanding access to broadband for low-income households	Ongoing	Business Community; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies
New, Existing, or Restructured Initiatives	**Implement** the recommendations of MTC/ABAG's Regional Governmental Partnership for Local Economic Rebound initiative	Years 2-5	

Strategy EC3: **Invest in high-speed internet in underserved low-income communities**

Summary and Considerations

Authority, financial resources and technical capacity are major challenges for this strategy, which nonetheless has strong public and political support. Given significant recent investments by the State of California to help bridge the digital divide, as well as additional significant investment expected from the federal government, a support role for MTC/ABAG in strategy implementation is recommended.

The State of California has a major initiative underway to expand high-speed internet that has been accelerated due to the COVID-19 pandemic. The recently approved California state budget included a $6 billion investment to expand broadband infrastructure and enhance internet access for unserved and underserved communities. Aligning with the California State Broadband Action Plan and advocating along with regional broadband consortiums, local jurisdictions, and other regional stakeholders for continued state support and involvement in expanding broadband access to low-income households will be critical moving forward.

At the federal level, the Bipartisan Infrastructure Investment and Jobs Act currently being debated by Congress includes a $65 billion investment to ensure all the nation's residents have access to reliable high-speed internet.

Finally, there is an opportunity to leverage and learn from relevant local efforts. The City of San Jose has pledged to close the digital divide through its Digital Inclusion Partnership, a $24 million cross-sector fund to connect and promote digital skills for fifty thousand San Jose households. Oakland Undivided is an effort led by the Oakland Public Education Fund to ensure every student in the Oakland public school system has access to a computer, an internet connection and technology support. Furthermore, in the North Bay, Digital Marin has been engaged in extensive process to understand the digital needs of a wide range of constituents and bring high-speed internet access to all.

Strategy EC4: **Allow greater commercial densities in Growth Geographies**

Strategy Cost   N/A

Abbreviated Strategy Description   Allow greater densities for new commercial development in select Priority Development Areas (PDAs) and Transit-Rich Areas (TRAs) to encourage more jobs to locate near public transit.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Advocate** for legislation that enables a greater mix of commercial densities as outlined in the plan's Growth Geographies	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Labor; Local Jurisdictions; Transit Operators;
New, Existing or Restructured Initiatives	**Complete and implement** the TOD Policy Update to ensure land use supports transit investments	Years 1-2 (policy update); Ongoing thereafter	
	Continue and seek greater strategic alignment of existing programs, including the PDA Planning Grants Program, with expanded emphasis on integrating housing and job growth at transit-supportive densities in transit-rich Growth Geographies	Ongoing	

Strategy EC4: **Allow greater commercial densities in Growth Geographies**

Summary and Considerations

The agency has no authority over local land use or permitting, which is exclusively under the purview of local jurisdictions. In terms of costs, there are fewer financial resources needed to implement this strategy, although zoning changes, general plan updates, environmental impact reports or related studies do represent a cost to local jurisdictions. Public and political support for this strategy varies across the region.

Given the importance of this strategy to meeting the plan's aggressive greenhouse gas emissions reduction target, it is anticipated that MTC/ABAG will take a partner role in strategy implementation, primarily through existing initiatives such as the PDA Planning Grants and PDA Technical Assistance programs, which could help support jurisdictions financially with their planning needs. Internal technical capacity could be further strengthened with additional resources.

Strategy EC5: **Provide incentives to employers to shift jobs to housing-rich areas well served by transit**

Strategy Cost N/A

Abbreviated Strategy Description Provide subsidies to encourage employers to relocate offices to housing-rich areas near regional rail stations.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs**, including the PDA Planning Grants Program, with expanded emphasis on integrating housing and job growth at transit-supportive densities in transit-rich Growth Geographies	Ongoing	Business Community; CTAs; Local Jurisdictions; Transit Operators

Strategy EC5: **Provide incentives to employers to shift jobs to housing-rich areas well served by transit**

Summary and Considerations

Authority, financial resources and technical capacity are significant challenges for this strategy, which has mixed public and political support depending on the location and nature of expected job shifts. Given this, MTC/ABAG will primarily take a support role by coordinating transportation investments with local jurisdictions. The Partnership Phase of the Implementation Plan revealed an interest amongst several business leadership organizations and public policy thinktanks in supporting and partnering in the implementation of this strategy. Identifying additional potential advocates and partners, as well as identifying potential financial resources, will be a continued area of focus for potential champions of this strategy.

Strategy EC6: **Retain and invest in key industrial lands**

Strategy Cost
$4 billion

Abbreviated Strategy Description
Implement local land use polices to protect key industrial lands identified as Priority Production Areas (PPAs), while funding key infrastructure improvements in these areas.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role
Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Evaluate** funding sources and develop a pilot PPA planning and technical assistance program, with a goal of supporting up to five PPAs by 2025	Years 1-5	Air District; Business Community; CTAs; Local Jurisdictions

Summary and Considerations
The agency has no authority over local land use or permitting, although MTC/ABAG do have resources that could potentially fund infrastructure or planning activities. The PPA pilot program was approved in 2019 to enable an initial set of PPAs to be integrated into Plan Bay Area 2050, but future funding would need to be identified to support PPAs in a similar manner as PDA programs that support local jurisdictions. Evaluating funding opportunities to support PPAs, including existing funding sources, potential funding swaps, or other programs and mechanisms, will be a continued area of focus during the plan's implementation period.

Given that the PPA designation is a pilot program that requires testing, it is anticipated that MTC/ABAG will take a partner role by supporting investments in select jurisdictions over the next several years.

Strategy T1: **Restore, operate and maintain the existing system**

Strategy Cost	$389 billion
Abbreviated Strategy Description	Commit to operate and maintain the Bay Area's roads and transit infrastructure, while restoring transit service hours to 2019 levels no later than 2035.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** and/or increased funding to support transportation operations and maintenance needs	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Labor; State Agencies; Transit Operators
New, Existing, or Restructured Initiatives	**Continue** existing asset management programs such as StreetSaver, StreetSaver Plus, and the Pavement Technical Assistance Program, among others, and develop detailed asset management plans for each of the BATA toll bridges as identified in the BATA Recovery Action Plan	Ongoing	
	Coordinate the Bay Area's transportation pandemic recovery with a focus on fiscal stabilization, system rebuilding and transit ridership restoration	Years 1-2	
	Reassess Plan Bay Area 2050's transportation element financial assumptions in 2023 to better reflect the region's post-COVID-19 financial conditions	Years 3-5	

Strategy T1: **Restore, operate and maintain the existing system**

Summary and Considerations

Fix-It-First has been MTC's long-standing commitment to the regional transportation network, and the agency has technical capacity to support this popular strategy moving forward. In addition, MTC has good, effective partnerships with Caltrans, County Transportation Authorities (CTAs), local Departments of Transportation (DOTs), and regional transit operators through which to continue supporting the operations and maintenance of the transit network and keeping the system in a state of good repair.

It is expected that leading the Bay Area's transportation pandemic recovery and facilitating the restoration of transit service levels in the post-COVID environment will be a major area of focus during the implementation period. MTC has taken a central role in distributing transportation funding from recent federal relief and recovery efforts to help stabilize the region's transit providers and recently launched the "All Aboard Transit Campaign" in partnership with over two dozen transit providers to help bring riders back to transit. Advocating for new and/or increased federal, state or regional revenues that can fill ongoing funding gaps and support transit operations — as well as continued evaluation of the impacts of recent and expected federal transportation investments — will be a key consideration moving forward.

Strategy T2: **Support community-led transportation enhancements in Equity Priority Communities**

Strategy Cost	$8 billion
Abbreviated Strategy Description	Provide direct funding to historically marginalized communities to fund locally identified transportation needs.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Partner

Recommended Priorities for Implementation

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** and/or increased funding for transportation, including for community-led enhancements	Ongoing	Air District; CTAs; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies; Transit Operators
New, Existing, or Restructured Initiatives	**Implement** the recommendations of the Blue Ribbon Transit Recovery Task Force related to the development and adoption of equity principles	Years 1-2	
	Update guidelines for the upcoming cycle of the Community-Based Transportation Planning (CBTP) Program and explore restructuring of the Lifeline Transportation Program and/or using other existing funding sources to support the development and advancement of CBTPs and Participatory Budgeting projects	Years 1-3	

Strategy T2: **Support community-led transportation enhancements in Equity Priority Communities**

Summary and Considerations

MTC has authority to convene relevant stakeholders and some ability to identify and allocate transportation funding; however, resources under existing programs, such as the Lifeline Transportation Program, are not sufficient to the scale of identified needs. Identifying funding to support the strategy will therefore be the biggest area of focus during the implementation period and the agency's recently adopted Equity Platform provides an important framework through which to advance future work. Both the Lifeline Transportation Program as well as Participatory Budgeting pilots conducted in San Francisco's Bayview neighborhood and the City of Vallejo in partnership with the San Francisco County Transportation Authority and the Solano Transportation Authority, respectively, offer proofs of concept and models to emulate.

These efforts — as well as complementary initiatives such as the California Air Resources Board's Community Air Protection Program (Assembly Bill 617 (C. Garcia, Statutes of 2017)) — can serve as a foundation upon which to build future capacity, deliver better future access and mobility and eliminate disparities throughout the region. Through AB 617, for example, the Bay Area Air Quality Management District supported the development of the West Oakland Community Action Plan, which contained community-developed recommendations to improve transit service and improve the design and safety of local streets for pedestrians and bike trips.

The Partnership Phase of the Implementation Plan revealed broad interest from a wide range of partners in supporting implementation of this strategy. CTAs, cities, community-based organizations, transit operators, the public, as well as health and social services will all be necessary to realize the strategy's promise, with a focus on engaging with communities both on priorities and the project identification process.

Strategy T3: **Enable a seamless mobility experience**

Strategy Cost

$3 billion

Abbreviated Strategy Description

Eliminate barriers to multi-operator transit trips by streamlining fare payment and trip planning, while requiring schedule coordination at timed transfer hubs.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Evaluate** and, if necessary, seek state legislative authority to support implementation of Fare Coordination and Integration Study recommendations	Years 1-2	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies; Transit Operators
New, Existing, or Restructured Initiatives	**Implement** the recommendations of the Fare Coordination and Integration Study, including selecting and funding pilot projects	Year 1	
	Implement the customer information recommendations of the Blue Ribbon Transit Recovery Task Force, including finalizing regional mapping and wayfinding standards, delivering pilot projects, and developing a regional mapping data services digital platform	Years 1-4	
	Implement the transit network recommendations of the Blue Ribbon Transit Recovery Task Force, including those related to connected network planning, data collection and coordination, branding/mapping/wayfinding, technology and mobile standards, service coordination and transit network management reforms, among others	Years 1-3	

Strategy T3: **Enable a seamless mobility experience**

New, Existing, or Restructured Initiatives *(cont'd)*	**Implement** the accessibility recommendations of the Blue Ribbon Transit Recovery Task Force, including designating a mobility manager and identifying key paratransit challenges and reforms through the Coordinated Plan update	Years 1-3	*Identified above*
	Deploy the Clipper® Mobile app, next-generation Clipper® and a single regional mobility account platform to improve seamless integration of the network	Years 3-5	

Summary and Considerations

MTC's transit coordination requirements are laid out in Resolution 3866, which allows MTC to identify, recommend, establish and coordinate transit connectivity improvements, requirements and performance standards and condition regional discretionary funds based on compliance. Financial resources are available that could potentially support this strategy, and it is not high-cost relative to its potential ridership benefits. MTC has meaningful existing initiatives within this space (Clipper® START℠, next-generation Clipper®, Regional Mapping and Wayfinding, and Regional Transit Priority in the bridge corridors), and these efforts provide a firm foundation to build future work upon.

The next-generation Clipper® system, for example, is a proven regional fare payment system that has been designed to support integrated payment for multiple mobility services. The region has made a significant investment in designing this account-based system, which could serve as a platform for a future seamless mobility experience.

In addition, in July 2021, the Blue Ribbon Transit Recovery Task Force released their Transformation Action Plan including 27 recommendations to guide the post-pandemic future of the Bay Area transit network. Many of these recommendations align with the goals of Strategy T3 and have been incorporated into the Final Implementation Plan, including in areas such as fares and payment, customer information, transit services and accessibility. Implementation of these recommendations will be carried forward over the next several years collaboratively with a wide range of partners including transit agencies, the state legislature, CTAs, the California State Transportation Authority, Caltrans, paratransit providers, local jurisdictions, and non-governmental organizations, among others.

Strategy T4: **Reform regional transit fare policy**

Strategy Cost $10 billion

Abbreviated Strategy Description Streamline fare payment and replace existing operator-specific discounted fare programs with an integrated fare structure across all transit operators.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues and/or increased funding** for fare policy reform, including means-based considerations	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Transit Operators
	Evaluate and, if necessary, seek state legislative authority to support implementation of Fare Coordination and Integration Study recommendations	Years 1-2	
New, Existing, or Restructured Initiatives	**Implement** the recommendations of the Fare Coordination and Integration Study, including selecting and funding pilot projects	Year 1	
	Continue and seek greater strategic alignment of existing programs, including Clipper® START℠	Ongoing	

Strategy T4: **Reform regional transit fare policy**

Summary and Considerations

Although fare coordination requirements are one of the key elements of Resolution 3866, there have historically been implementation challenges with establishing consistency across two dozen independent operators. In addition, fully implementing means-based fares as envisioned by the strategy would require significant subsidy for transit operators, for which financial resources have not yet been identified. That said, MTC may have a key role to play in guiding this effort moving forward and serving as a bridge between the region's transit operators. These efforts would build off key successes such as the Clipper® program, as well as pilots such as Clipper® START℠.

As with Strategy T3, the Blue Ribbon Transit Recovery Task Force Transformation Action Plan made several recommendations relevant to this strategy in the area of fare integration policy. The Final Implementation Plan has been updated accordingly, with focus on implementing the recommendations of the Fare Coordination and Integration Study, including selecting and funding pilot projects, as well as evaluating and – if needed – seeking legislative authority to support uniform implementation.

Strategy T5: Implement per-mile tolling on congested freeways with transit alternatives

Strategy Cost $1 billion

Abbreviated Strategy Description Apply a per-mile charge on auto travel on select congested freeway corridors where transit alternatives exist, with discounts for carpoolers, low-income residents, and off-peak travel, with excess revenues reinvested into transit alternatives in the corridor.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited   Partial   Existing

MTC/ABAG Implementation Role Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	Continue implementation of existing programs, including FasTrak® START, HOV occupancy verification pilots and Express Lanes, while considering strategic implications of all-lane tolling	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; State Agencies; Transit Operators
Planning or Research	Identify strategies to equitably advance roadway pricing on congested freeways through technical analysis and deep engagement with key partners, stakeholders and the public	Years 2-3	

Strategy T5: **Implement per-mile tolling on congested freeways with transit alternatives**

Summary and Considerations

MTC does not currently have the authority to implement this strategy; state legislation would be required and federal regulations would need to be updated as well (although the infrastructure bill currently being debated by Congress is expected to provide the opportunity for new pilot pricing projects without new regulations). In addition, more limited public and political support will pose a challenge for successful implementation. Ongoing pilots with HOV occupancy verification and Express Lanes means-based tolls could provide important lessons and serve as building blocks for future implementation efforts.

A proposed lead role for this strategy would focus on pursuing future implementation actions that address limitations with existing authority, resources, capacity and support. In particular, MTC has received a grant from Caltrans to lead the Next-Generation Freeways Study to advance the freeway all-lane tolling concept, including a significant outreach and engagement component with county and city officials and a wide range of other stakeholders. The study is expected to explore how road pricing can benefit travelers by addressing the inequities built into the current system and also by decreasing traffic congestion. The study will also look at how to pair the strategy with complementary investments, as well as how the strategy may affect the viability of other MTC projects, such as Express Lanes and toll bridges.

There is also an opportunity to learn from existing work led by partners. In addition to Caltrans' Road Charge program, the City and County of San Francisco is leading multiple relevant initiatives, including Treasure Island and Yerba Buena Island Mobility Management (Tolling) Program as well as the Downtown Congestion Pricing Study.

Strategy T6: **Improve interchanges and address highway bottlenecks**

Strategy Cost	$12 billion
Abbreviated Strategy Description	Rebuild interchanges and widen key highway bottlenecks to achieve short-to-medium-term congestion relief.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Continue and seek** greater strategic alignment of existing programs, including "Forward" Commute Initiatives	Ongoing	CTAs; Local Jurisdictions; State Agencies

Summary and Considerations

MTC's traditional authorities and resources in this strategy area are clearly defined and delimited as the region's transportation planner, funder and coordinator and, as such, MTC is best positioned to take a "Support" role in strategy implementation. The state of California and Caltrans are particularly essential partners in delivering highway bottleneck relief and interchange improvement projects. In addition, local road projects are critical to local mobility needs and in general are best advanced by CTAs and local jurisdictions. The Alameda County Transportation Commission, for example, is conducting or has already completed assessments of key transportation corridors, which could help inform the implementation of this and other complementary strategies. There are several key regional initiatives such as the "Forward" Commute Initiatives, among others, where a more active regional role will be required.

Strategy T7: **Advance other regional programs and local priorities**

Strategy Cost	$17 billion
Abbreviated Strategy Description	Fund regional programs like motorist aid and 511, while supporting local transportation investments on arterials and local streets.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
New, Existing, or Restructured Initiatives	**Continue and seek** greater strategic alignment of existing programs including Clipper®, 511, Freeway Service Patrol, Emergency Management, Incident Management and Connected Bay Area	Ongoing	CTAs; Local Jurisdictions; State Agencies

Summary and Considerations

MTC's traditional authorities and resources in this strategy area are clearly defined and delimited as the region's transportation planner, funder and coordinator. The agency has existing capacity to support regional programs such as 511, as well as locally defined arterial and local street priorities. Other existing programs to support this strategy include Freeway Service Patrol, Emergency Management, Incident Management and Connected Bay Area, among others. Connected Bay Area, for example, includes projects aimed at improving transportation system management, as well as telecommunications-based projects.

Strategy T8: **Build a Complete Streets network**

Strategy Cost	$13 billion
Abbreviated Strategy Description	Enhance streets to promote walking, biking, and other micromobility through sidewalk improvements, car-free slow streets and 10,000 miles of bike lanes or multi-use paths.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Seek new revenues** and/or increased funding for transportation, including for Complete Streets priorities	Ongoing	Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies
New, Existing, or Restructured Initiatives	**Continue and seek** greater strategic alignment of existing programs, such as the Active Transportation Program and the Quick-Build Technical Assistance program, and local roadway asset inventory development which support Complete Streets efforts	Ongoing	
Planning or Research	**Complete and implement** the recommendations of the Regional Active Transportation Plan	Years 1-2 (complete plan); Ongoing thereafter	

Strategy T8: **Build a Complete Streets network**

Summary and Considerations

With the exception of connections to regional bridges and trails, MTC has limited authority vis-à-vis programmatic investments such as bike and road projects on local roads and land, as well as limited capacities with respect to street engineering. The agency does have an important role to play in its planning, funding and coordinating capacities, however. MTC is in the process of developing the Regional Active Transportation Plan, which will help guide regional strategy and priorities, including the development of a regional active transportation network, as well as analysis of the funding needed to implement the network. Ultimately, local jurisdictions will be responsible for implementation and, as such, this was among the most popular strategies for partnership during the Partnership Phase of the Implementation Plan. A wide range of local jurisdictions, transit agencies, CTAs, state agencies, environmental and equity non-profits, business organizations, and universities expressed an interest in working together to support strategy implementation.

There are a number of ongoing, complementary initiatives at various levels of government that support implementation of this strategy. At the federal level, the Bipartisan Infrastructure Investment and Jobs Act currently being debated by Congress is expected to include dedicated and expanded funding to support pedestrian and bicyclist needs. At the state level, Caltrans District 4 recently released both a "Pedestrian Plan for the Bay Area" as well as a "Bike Plan for the San Francisco Bay Area", which evaluated needs and is designed to serve as a reference for planners and project designers. Local jurisdictions throughout the region started, continued or even made permanent slow streets programs during the pandemic, in locations as varied as Alameda, Burlingame, Berkeley, Novato, Oakland, Petaluma, Redwood City, San Francisco and San Rafael.

Key questions for continued exploration during the implementation period will include: 1) how MTC can best support local needs and most effectively serve as a convener, facilitator and educator, 2) how to build on ongoing coordination efforts with Caltrans and further support accelerated project delivery timelines for complete streets enhancements, and 3) how to incorporate a wider range of policy considerations, such as trails connectivity, multi-benefit roadway investments, and green sustainable infrastructure, into regional active transportation planning.

Strategy T9: Advance regional Vision Zero policy through street design and reduced speeds

Strategy Cost	$4 billion
Abbreviated Strategy Description	Reduce speed limits to 20 to 35 miles per hour on local streets and 55 miles per hour on freeways, relying on design elements on local streets and automated speed enforcement on freeways.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Advocate** for policy changes that will improve roadway safety, particularly for the most vulnerable users, including but not limited to authorization for automated speed enforcement	Years 1-2	CTAs; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; State Agencies
	Seek new revenues and/or increased funding for transportation, including for Vision Zero priorities	Ongoing	
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs**, such as the Vision Zero shared data initiative, which support regional safety efforts	Ongoing	
	Complete and implement the recommendations of the Regional Active Transportation Plan	Years 1-5	

Strategy T9: **Advance regional Vision Zero policy through street design and reduced speeds**

Summary and Considerations	MTC has limited authority with regards to street design or roadway speeds, which are typically addressed at the local or state levels. The agency does have the Regional Safety/Vision Zero Policy, as well as other policy initiatives and performance targets to encourage and incentivize local jurisdictions to prioritize safety, such as the Regional Integrated Safety Data System. The resources and staffing required to fully support this strategy are still under development, although the needs are scalable.

Generally speaking, there is strong public and political support for reducing traffic fatalities even though there is less specific support for reducing roadway speeds, which could create political challenges. Enforcement would also be a major question with the strategy, as this has generally not been a space that MTC operates in. Partnering with all key stakeholders — including equity advocates, local jurisdictions and CTAs, among others — will be essential to supporting the strategy's success.

To that end, there is an opportunity to leverage and learn from local jurisdiction experiences with their own Vision Zero initiatives. The City of Fremont, for example, recently adopted an updated Vision Zero Action Plan commemorating five years of Vision Zero implementation in the city, which saw improvements such as brighter street lighting, citywide pedestrian countdown signals, enhanced pedestrian crossings, safer roadway striping designs, and increased enforcement of speeding. Fremont's Vision Zero program yielded a 45 percent reduction in fatalities and severe injuries caused by traffic crashes in the five years since program adoption. |

Strategy T10: **Enhance local transit frequency, capacity and reliability**

Strategy Cost $32 billion

Abbreviated Strategy Description   Improve the quality and availability of local bus and light rail service, with new bus rapid transit lines, South Bay light rail extensions and frequency increases focused in lower-income communities.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues and/or increased funding for transportation**, including for local transit expansion, and convene stakeholders through late 2023 to identify priorities and a funding framework for a future transportation ballot measure that would include new funding for transit	Ongoing	Business Community CTAs; Equity and Environmental Advocates/Non-Profits; Labor; Local Jurisdictions; State Agencies; Transit Operators;
New, Existing, or Restructured Initiative	**Continue and seek greater strategic alignment of existing programs**, including the "Forward" Commute Initiatives person-throughput investments and transit signal priority investments	Ongoing	
	Implement the transit network recommendations of the Blue Ribbon Transit Recovery Task Force, including bus transit priority, bus/rail network management reforms, and connected network planning, among others	Years 1-3	

Strategy T10: **Enhance local transit frequency, capacity and reliability**

Summary and Considerations

Although MTC has important authorities and capacities as the regional transportation planner, funder and coordinator, CTAs and transit operators have historically been responsible for implementation of local transit improvements. Financial resources are also a challenge for this strategy as many of these investments rely on new revenues that are not secured. Furthermore, local jurisdictions or the state typically have control over the roadway network, and congestion can impact the efficacy of frequency and reliability improvements. That said, "quick build" projects can be low cost and many transit priority improvement projects are cost-effective. The importance and benefits of these projects has been elevated through recent efforts such as the Safe and Seamless Mobility Quick-Strike Program.

The Blue Ribbon Transit Recovery Task Force Transformation Action Plan contained a number of transit network recommendations relevant to this strategy, including bus transit priority, bus/rail network management reforms, and connected network planning, among others. The Final Implementation Plan has been updated to reflect these recommendations.

Strategy T11: **Expand and modernize the regional rail network**

Strategy Cost

$81 billion

Abbreviated Strategy Description

Better connect communities while increasing frequencies by advancing a New Transbay Rail Crossing, BART to Silicon Valley Phase 2, Valley Link, Caltrain/High-Speed Rail Grade Separations and the Downtown Caltrain Extension, among other projects.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	*Partial*	*Existing*

MTC/ABAG Implementation Role

Partner 🤝

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** and/or increased funding for transportation, including regional transit expansion, and convene stakeholders through late 2023 to identify priorities and a funding framework for a future transportation ballot measure that would include new funding for transit	Ongoing	Business Community; CTAs; Labor; State Agencies; Transit Operators
	Advocate for major capital projects and position them for success, including sequencing projects to align with funding availability as well as assessing their existing funding, project readiness and characteristics that support Plan Bay Area 2050 goals	Years 1-4	
	Advocate for the next phase of California High-Speed Rail (CAHSR) construction to connect the Central Valley to the Bay Area, while partnering with state agencies to seek more federal and state monies for the project	Ongoing	

Strategy T11: **Expand and modernize the regional rail network**

New, Existing, or Restructured Initiatives	**Complete and implement** the TOD Policy Update to ensure land use supports transit investments and access to transit	Years 1-2 (policy update); Ongoing thereafter	*Identified above*
	Implement the rail network management reforms and connected network planning recommendations of the Blue Ribbon Transit Recovery Task Force, including delivery of the Rail Partnership and Governance Assessment	Years 1-3	
	Collaborate with local, regional and megaregional partners on major transportation projects to evaluate regional project delivery paradigms and support improved schedule adherence and reduced costs	Years 1-4	

Summary and Considerations

Although MTC has important authorities and capacities as the regional transportation planner, funder and coordinator, other strategic partners are ultimately responsible for regional rail network expansion and modernization. Financial resources are also a challenge as many of these investments rely on new revenues that are not secured. MTC's primary role in this space will therefore involve providing leadership on regional, state and federal funding advocacy efforts, supporting regional and megaregional coordination in project development and delivery, and creating an enabling policy environment to support transit investments through efforts such as the TOD Policy Update. Coordinating to ensure greater consistency between regional priorities and the upcoming update of the California State Rail Plan will also be an important consideration moving forward.

With respect to regional and megaregional coordination, the Blue Ribbon Transit Recovery Task Force Transformation Action Plan contained several recommendations relevant to this strategy, particularly with respect to rail network management reforms and connected network planning. Key initiatives that will be carried forward with strategic partners over the next two-plus years include a business case analysis of potential network management reforms, including resource requirements and implementation steps; an assessment of rail partnerships and governance; as well as the development of a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks, funding requirements and next steps.

Strategy T12: **Build an integrated regional express lanes and express bus network**

Strategy Cost
$9 billion

Abbreviated Strategy Description
Complete the buildout of the regional Express Lanes Network to provide uncongested freeway lanes for expanded express bus services, carpools and toll-paying solo drivers.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role
Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Advocate** for changes to state law and federal regulations that will expand opportunities to convert general-purpose and part-time travel lanes to priced facilities	Ongoing	Business Community; CTAs; State Agencies; Transit Operators;
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs**, including the Express Lanes Network expansion, and follow the recommendations of the Bay Area Express Lanes Strategic Plan, which will guide future network investments, priorities and policies	Ongoing	
	Implement the bus transit priority and connected network planning recommendations of the Blue Ribbon Transit Recovery Task Force that align with the goals of an expanded express bus network	Years 1-3	

Strategy T12: **Build an integrated regional express lanes and express bus network**

Summary and Considerations

Currently, MTC only has authority for a portion of the express lanes network, so partnership with CTAs and transit operators will be essential to the success of an integrated regional express lanes and express bus network. Although not all financial resources are secure, the express lanes are projected to generate a limited amount of net revenue that could support the network in the future. Regional express lanes projects have also been successful in obtaining state discretionary grant funding. In addition, the express bus routes identified in Plan Bay Area 2050 are lower-cost transit alternatives that could advance to implementation. MTC and partners have existing technical capacity in express lanes while transit operators have experience with express bus service; it will therefore be key to include transit operators early in any planning process for regional bus service. The recently adopted Bay Area Express Lanes Strategic Plan will help guide future investments, priorities and policies for the network. New challenges for the Express Lane Network include how to effectively mitigate vehicle miles traveled (VMT) impacts and whether this can be done on a regional basis; whether there will be any long-term impacts from the COVID-19 pandemic; and how to ensure consistent policies as the network coalesces into a seamless, connected system. Finally, express lanes will be included in the scope of the all-lane tolling on congested freeways study identified in Strategy T5 to better understand the role of express lanes in a road pricing environment.

Strategy EN1: **Adapt to sea level rise**

Strategy Cost	$19 billion
Abbreviated Strategy Description	Protect shoreline communities affected by sea level rise, prioritizing nature-based actions and resources in areas of low costs and high benefits and providing additional support to vulnerable populations.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** to support sea level rise adaptation	Ongoing	BCDC; Business Community; CTAs; Equity and Environmental Advocates; Labor; Local Jurisdictions; State Agencies; Transit Operators
	Advocate for legislative reforms to better address climate adaptation and resilience goals and establish clear roles and responsibilities for sea level rise adaptation planning, funding and implementation through the BARC Regional Climate Adaptation Legislative Working Group	Years 1-2	
New, Existing, or Restructured Initiatives	**Support** multi-benefit, multi-jurisdictional shoreline adaptation efforts, working in partnership with cities, counties and other key partners, with a goal of supporting up to five adaptation planning processes by 2025	Years 3-5	
	Support BCDC in implementation of the Bay Adapt Joint Platform, a collaborative strategy to adapt to rising sea levels	Ongoing	
	Support BCDC in the development of a "One Bay" Vision for sea level rise adaptation rooted in community, Bay ecosystems and the economy, incorporating this vision into the next Plan Bay Area update	Years 2-5	

Strategy EN1: **Adapt to sea level rise**

New, Existing, or Restructured Initiatives *(cont'd)*	**Prioritize** implementation of natural and nature-based solutions through the San Francisco Estuary Partnership's projects and programs	Ongoing	
Planning or Research	**Develop** a sea level rise funding plan to support the implementation of projects that reduce sea level rise risks to communities, infrastructure and ecology, prioritizing green infrastructure wherever possible	Years 1-3	*Identified above*
	Study and identify Plan Bay Area 2050 Growth Geographies for resilience risk and opportunities and reform Growth Geography planning guidance accordingly	Years 2-4	

Summary and Considerations

During the Implementation Plan Partnership Phase over summer 2021, MTC/ABAG heard from several partners and stakeholders that the agencies would be best positioned to play a partnership role in supporting this strategy, to better reflect the multi-sectoral and multi-disciplinary nature of sea level rise adaptation work.

Over the last several years, MTC/ABAG have been growing technical capacity by building internal staffing expertise, funding and managing local and regional climate adaptation planning efforts, and strengthening partnerships with other agencies, local jurisdictions, counties, non-profits, CBOs and the business community. MTC/ABAG host the San Francisco Estuary Partnership (SFEP), which advances projects and programs to increase the resilience of the estuary and its surrounding communities under its *Estuary Blueprint*. SFEP also works closely with the California State Coastal Conservancy (SCC) providing staff support for the San Francisco Bay Restoration Authority. As members of the Bay Area Regional Collaborative (BARC), MTC and ABAG work collaboratively with other member agencies including BCDC, the SCC, and the San Francisco Bay Regional Water Quality Control Board to address regional climate change challenges through regional coordination.

Partners have also been leading sea level rise work on the county and regional levels. Marin County's BayWAVE initiative aims to provide coordinated sea level rise and adaptation planning through partnerships, education and projects. In January 2020, the San Mateo County Flood and Sea Level Rise Resiliency District, known as OneShoreline, was formed as an independent government agency working to make San Mateo County more resilient to the climate change-related impacts of sea level rise, flooding, and coastal erosion through planning, funding and building projects. In December 2020, Caltrans District 4 released an "Adaptation Priorities Report" which included a prioritized list of potentially exposed transportation assets.

More broadly, beginning in 2019, Bay Adapt, a voluntary, collaborative initiative led by BCDC, sought to establish regional agreement on the actions necessary to protect the Bay Area's people and natural and built environments from sea level rise. In June 2021, Bay Adapt's 35-member Leadership Advisory Group of executive-level leaders from private, public, and nonprofit organizations unanimously agreed to support its implementation. The Bay Adapt Joint Platform lays out nine actions and 21 tasks that will enable the region to adapt faster, better and more equitably to a rising Bay; the actions identified in the Plan Bay Area 2050 Implementation Plan are fully consistent with and supportive of the Bay Adapt Joint Platform. Key considerations for partners moving forward will include ensuring the ongoing participation and leadership of Community Based Organizations (CBOs) and frontline communities in climate adaptation planning as well as making climate science, information, and guidance easier to access – potentially through a science consortium or "storefront" for technical assistance.

Strategy EN2: **Provide means-based financial support to retrofit existing residential buildings**

Strategy Cost
$15 billion

Abbreviated Strategy Description
Adopt building ordinances and incentivize retrofits to existing buildings to meet higher seismic, wildfire, water and energy standards, providing means-based subsidies to offset associated costs.

Strategy Success Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role
Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Seek new revenues** to incentivize residential building retrofits and advocate for changes relative to the use of ratepayer funds	Years 3-5	Air District;
New, Existing, or Restructured Initiatives	**Evaluate** the feasibility of expanding BayREN's scope/mission to support residential building retrofits and water/energy upgrades in order to reduce risks from hazards while also reducing energy and water use, utility bills, and greenhouse gas emissions	Years 3-5	Equity and Environmental Advocates/Non-Profits; Labor;
Planning or Research	**Compile** detailed assessments for seismic, wildfire, water and energy needs, which will explore financial needs, key relevant initiatives, best practices, key stakeholders and workforce and technology needs, among other areas	Years 1-3	Local Jurisdictions; State Agencies

Strategy EN2: **Provide means-based financial support to retrofit existing residential buildings**

Summary and Considerations

BayREN, a regional program administered through ABAG, administers existing programs to provide energy retrofits both single family and multifamily buildings, as well as an existing water efficiency program. These programs are currently funded with ratepayer dollars from the California Public Utilities Commission and provide technical assistance and rebates for energy efficiency improvements, as well as an assessment of health-related building issues for single family homes and encouragement to reduce climate impacts. BayREN also has a codes program focusing on adoption and implementation of state laws and local ordinances. Expanding BayREN's scope or mission beyond its existing program offerings would require authority from BayREN's Coordinating Circle and would be contingent on securing significant new resources over the next three to eight years. Regional coordination already occurs relative to energy efficiency programs and partnerships would need to be expanded with the scope of the program to ensure alignment with existing and evolving initiatives at the local, regional, state, and federal levels.

Some programs in the region are already starting to look at buildings more holistically. For example, the Bay Area Multifamily Building Enhancements Program supports both energy and water upgrades with consulting and cash rebates. Moving forward into the plan's implementation period, there will also be an opportunity to continue exploring how residential building resilience intersects with the work of the agencies' regional housing portfolio.

Strategy EN3: **Fund energy upgrades to enable carbon neutrality in all existing commercial and public buildings**

Strategy Cost	$18 billion
Abbreviated Strategy Description	Support electrification and resilient power system upgrades in all public and commercial buildings.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role — Support

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** for energy upgrades and electrification and advocate for changes relative the use of ratepayer funds	Years 3-5	Air District; Business Community; Labor; Local Jurisdictions; State Agencies
New, Existing, or Restructured Initiatives	**Evaluate** the feasibility of expanding BayREN's scope/mission to support energy upgrades and electrification in existing commercial and public buildings	Years 3-5	

Strategy EN3: **Fund energy upgrades to enable carbon neutrality in all existing commercial and public buildings**

Summary and Considerations

BayREN, a regional program administered through ABAG, administers an existing program to improve energy efficiency in commercial buildings and is considering adding a program to address public buildings. BayREN also provides a Municipal Buildings ZNE/ZNC Technical Assistance Program for Bay Area local governments through its codes program. These programs are currently funded with ratepayer dollars from the California Public Utilities Commission. Because ratepayer funds can only be applied to measures that are cost-effective and will save enough money to cover the cost of the equipment and installation, some electrification and resilience improvements cannot be addressed through the existing program although there is strong interest. Financial resources are therefore a major challenge which could potentially be addressed either by advocating for changes to restrictions on ratepayer funds in order to reflect the value to ratepayers of load shifting, reducing grid impacts, and reducing climate impacts, or by obtaining additional sources of funding. Regional coordination already occurs relative to energy efficiency programs and would need to be continued and expanded to ensure alignment with existing and evolving initiatives at the local, regional state, and federal levels.

Overall, this is an area where greater federal and state leadership will be required to support strategy implementation progress and where the agencies would expect to support and align with the work of other entities. Within the region, several Bay Area community choice aggregation programs offer technical assistance or funding that help commercial or public buildings move towards carbon neutrality. East Bay Community Energy, for example, has a Municipal Electrification Assistance Program, Marin Community Energy offers a Commercial Energy Efficiency Program, and Peninsula Clean Energy together with Silicon Valley Clean Energy have an Electrification Technical Assistance program available to all building types. The Bay Area Air Quality Management District is also pursuing a Building Decarbonization Program through a variety of different initiatives.

Strategy EN4: **Maintain urban growth boundaries** 🌳

Strategy Cost   N/A

Abbreviated Strategy Description   Using urban growth boundaries and other existing environmental protections, confine new development within areas of existing development or areas otherwise suitable for growth, as established by local jurisdictions.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role   Support 👫👫♿

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy or Legislation	**Advocate** for the preservation of existing urban growth boundaries (UGBs) to avoid net expansion of areas eligible for urban development	Years 3-5	Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; Parks/Open Space Districts

Summary and Considerations   MTC/ABAG have no authority to ensure urban growth boundaries remain fixed going forward. Although there are some modest jurisdictional costs associated with this popular strategy, from a regional perspective it is relatively low-cost to implement. In addition, technical capacity primarily resides within local jurisdictions. MTC/ABAG should have sufficient capacity to support UGBs from the regional planning perspective and will continue to advocate that local jurisdictions respect existing urban growth boundaries.

Strategy EN5: **Protect and manage high-value conservation lands**

Strategy Cost $15 billion

Abbreviated Strategy Description   Provide strategic matching funds to help conserve and maintain high-priority natural and agricultural lands, including, but not limited to, Priority Conservation Areas (PCAs) and wildland-urban interface lands.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited   Partial   Existing

MTC/ABAG Implementation Role   Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** to support land conservation	Years 3-5	Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; Parks/Open Space Districts; State Agencies
New, Existing, or Restructured Initiative	**Revamp** the PCA planning framework using a data-driven approach to better prioritize the most critical areas for conservation, while addressing a broader range of policy concerns	Years 2-3	
	Continue and seek greater strategic alignment of existing programs, including funding and implementation of the Regional Advance Mitigation Program (RAMP) as well as the San Francisco Bay Trail and San Francisco Bay Area Water Trail	Ongoing	

Strategy EN5: **Protect and manage high-value conservation lands**

Summary and Considerations

MTC/ABAG have some authority and capacity to support this strategy, particularly through the existing PCA program. To that end, many partners and stakeholders expressed a strong desire over the course of the Implementation Plan Partnership Phase to work with MTC/ABAG on the proposed revamp of the PCA planning framework. Beyond the PCA program, however, the full scope of strategy implementation will necessitate leadership from and collaboration with a host of external partners.

At the state level, California Governor Newsom's recent Executive Order N-82-20 directs the California Natural Resources Agency to lead a planning effort to combat the biodiversity and climate crises and protect at least 30 percent of California's land and coastal waters by 2030. This effort will seek to "advance multi-benefit, voluntary and cooperative approaches that protect and restore biodiversity while stewarding natural and working lands, building climate resilience, and supporting economic sustainability". A report will be provided to the governor with proposed strategies by early 2022; the Executive Order also requires CARB to be part of the scoping plan process to include natural and working lands sector in achieving the State's carbon neutrality goal.

At the regional level, the Midpeninsula Regional Open Space District has many projects working on wildlife connectivity and habitat protection. Highway 17, for example, has fragmented thousands of acres of open space in the Santa Cruz Mountains, limiting the mobility of wildlife. The Highway 17 Wildlife and Regional Trail Crossings project is working to connect over 30,000 acres of protected public lands by developing wildlife and regional trail crossings across the highway. In Marin County, OneTam is a collaboration between National Park Service, California State Parks, Marin Municipal Water District, Marin County Parks, and Golden Gate National Parks Conservancy to protect and manage the Mount Tamalpais watershed.

Ongoing policy and strategy considerations for partners during the plan's implementation period may include how to raise the funding necessary to support the strategy, including key elements such as the RAMP program, as well as how to best align with Executive Order N-82-20.

Strategy EN6: **Modernize and expand parks, trails and recreation facilities**

Strategy Cost

$30 billion

Abbreviated Strategy Description

Invest in quality parks, trails and open spaces that provide inclusive recreation opportunities for people from all backgrounds, abilities and ages to enjoy.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited *Partial* *Existing*

MTC/ABAG Implementation Role

Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** for parks, recreation and open space, with a special emphasis on improving access and enhancing amenities for Equity Priority Communities	Years 3-5	Equity and Environmental Advocates/Non-Profits;
New, Existing, or Restructured Initiatives	**Continue and seek greater strategic alignment of existing programs**, including the Priority Conservation Area Program, the San Francisco Bay Trail, San Francisco Bay Area Water Trail, and Quick-Build technical assistance	Ongoing	Local Jurisdictions; Parks/Open Space Districts; State Agencies; Transit Operators

Strategy EN6: **Modernize and expand parks, trails and recreation facilities**

Summary and Considerations

MTC/ABAG have limited authority and financial resources to support this popular strategy, although the agencies do have some existing capacity through the PCA, Bay Trail, Water Trail, and Quick-Build technical assistance programs. These existing efforts could be built upon as models to support strategic local investment in regional recreation priorities, as well as supporting active transportation access, in partnership and collaboration with key strategic partners.

Overall, however, leading strategy implementation will primarily fall under the domain of other governing bodies, including local jurisdictions, regional parks and open space districts and the state. At the state level, the California Parks and Recreation Department's Statewide Comprehensive Outdoor Recreation Plan established two primary goals: 1) For all Californians to live within a half-mile of a park; and 2) For all Californians to live in an area with a minimum of three acres of parks per 1,000 residents. In addition, every year the State Coastal Conservancy issues tens of millions of dollars in grants to non-profit organizations, public agencies, and federally-recognized tribes for projects that restore and protect the California coast, increase public access to it, and increase communities' resilience to climate change.

Within the region, the Bay Area Trails Collaborative is working to advance the completion of 13 priority trail projects through planning, education, and marketing strategies that elevate the importance of these trails as part of a complete, connected regionwide trail network. The East Bay Regional Park District (EBRPD) also offers a variety of free and low cost programming across the East Bay, including recreation and environmental education, as well as a transportation assistance program.

Ongoing policy and strategy considerations to discuss for partners during the plan's implementation period may include how to raise the funding required to support the strategy and how to best support new and modernized parks, trails and recreation facilities with an emphasis on Equity Priority Communities.

Strategy EN7: **Expand commute trip reduction programs at major employers**

Strategy Cost	N/A
Abbreviated Strategy Description	Set a sustainable commute target for major employers as part of an expanded Bay Area Commuter Benefits Program, with employers responsible for funding incentives and disincentives to shift auto commuters to any combination of telecommuting, transit, walking and/or bicycling.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited | Partial | Existing

MTC/ABAG Implementation Role   Lead (with the Air District)

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Evaluate** and, if determined necessary and feasible, **seek** legislative authority to modify or expand the existing Bay Area Commuter Benefits Program in partnership with the Air District	Years 1-2 (Evaluate); Years 3-5 (Seek)	Air District; Business Community; CTAs; Equity and Environmental Advocates/Non-Profits; Local Jurisdictions; Transit Operators
New, Existing, or Restructured Initiatives	**Convene** local governments, TDM partners, transit agencies and employers to expand and foster relationships, target outreach, support education, develop metrics, share data and identify shared goals	Ongoing	
	Identify the resources and capacities necessary to implement an expanded Bay Area Commuter Benefits Program at both the Air District and MTC, including an effort to improve program data and enhance database functionality, while using existing resources to develop program messaging	Years 1-2	
Planning or Research	**Conduct research such as focus groups, workshops, surveys, polls and studies** to support the development of strategies and approaches that will maximize the viability of this strategy for major employers to implement	Years 2-4	

Strategy EN7: Expand commute trip reduction programs at major employers 🌳

Summary and Considerations

While the existing Bay Area Commuter Benefits Program does not have authority to set commute targets for major employers, new legislation could expand Air District/MTC authority to do so. The existing program has some funding, as well as limited staff resources from both the Air District and MTC, but it would require further expansion to fund education and outreach, tracking/reporting, regulatory oversight and enforcement. Finally, although public support for the strategy is strong, there is more work to do to build regional consensus for a sustainable commute target and facilitate needed reductions in auto commute trips.

A major focus of the implementation period will therefore involve getting critical input from employers and local partners through a wide range of mediums, building on relationships within the existing Commuter Benefit Program, developing program messaging and optimizing program design based on additional outreach, research, evaluation and planning. Aligning a potential advocacy strategy with the other "Big 4" MPOs in the state, as well as megaregional partners, may also be explored further.

During Implementation Plan Partnership Phase discussions, a number of partners expressed a strong interest in staying engaged and informed on Strategy EN7 implementation developments to better understand how strategy implementation could impact their programs or constituents. As outlined in the implementation actions above, it is the full intention of MTC and the Air District for partners to be closely involved in the development of an expanded Bay Area Commuter Benefits Program. Transit agency bulk pass programs, such as AC Transit's Easy Pass, for example, could be a tool for supporting commute trip reduction programs at major employers, and partners such as UC Berkeley could provide an ideal environment for innovative pilot projects.

Strategy EN8: **Expand clean vehicle initiatives**

Strategy Cost	$5 billion
Abbreviated Strategy Description	Expand investments in clean vehicles, including more fuel-efficient vehicles and electric vehicle subsidies and chargers.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Partner

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** and/or increased funding to support climate and electrification needs	Ongoing	Air District; CTAs; Local Jurisdictions; Equity and Environmental Advocates/Non-Profits; State Agencies
New, Existing, or Restructured Initiatives	**Restructure** MTC's Climate Initiatives Program to ensure it can effectively scale over the next five years, while advancing existing initiatives to support electric vehicle incentives and electric vehicle charger programs	Years 2-5	

Strategy EN8: Expand clean vehicle initiatives

🌳

Summary and Considerations

MTC has partial authority, resources and capacity to implement this popular strategy through its Climate Initiatives Program and ongoing partnership with the Air District. Successful implementation of significantly expanded incentives and infrastructure as defined in the strategy, as well as more targeted support for low-income households, will necessitate even closer partnership with other regulatory and funding agencies such as the California Air Resources Board, California Energy Commission and the Air District. It will also require an evaluation of current implementation approaches, which may require restructuring, as well as expanded capacities and resources to scale effectively. Key focus areas for the Climate Initiatives Program moving forward may include planning electric vehicle charging infrastructure; planning shared electric mobility options; increasing marketing, outreach and education efforts; and providing technical assistance for local planning and implementation.

In addition, it will be important to fully understand the implications of California Governor Newsom's Zero Emission by 2035 Executive Order (N-79-20) and ensure MTC has a seat at the table during relevant statewide legislative, planning and regulatory efforts.

Across the region, local jurisdictions have been taking a wide range of actions to support the deployment of clean vehicles. Peninsula Clean Energy, for example, has been working to support EV charging infrastructure at commercial workplaces, multi-family dwellings, and other public locations. Cities such as Berkeley and San Anselmo have developed Zero Emission Vehicle Roadmaps and cities such as Fremont and San Francisco have been taking the lead in EV fleet adoption. Community Choice Aggregators, such as East Bay Community Energy, have also been investing significant effort and resources in clean vehicle initiatives.

Strategy EN9: **Expand transportation demand management (TDM) initiatives**

Strategy Cost	$1 billion
Abbreviated Strategy Description	Expand investments in programs like vanpools, bikeshare, carshare and parking fees to discourage solo driving.

Strategy Assessment

Authority	Financial Resources	Public and Political Support	Technical Capacity

Limited	Partial	Existing

MTC/ABAG Implementation Role

Lead

Recommended MTC/ABAG Implementation Actions

Implementation Vehicle	Implementation Actions	Timeframe	Strategic Partners
Advocacy and Legislation	**Seek new revenues** and/or increased funding for climate and travel demand management needs	Ongoing	Air District; Business Community; CTAs; Local Jurisdictions
New, Existing, or Restructured Initiatives	**Restructure** MTC's Climate Initiatives Program to ensure it can effectively scale over the next five years, while advancing existing initiatives including local parking policies, curb management, Targeted Transportation Alternatives, Mobility Hubs, vanpooling, car sharing, MTC SHIFT and bikeshare and e-bike incentive programs	Years 2-5	
	Convene local governments, TDM partners and employers to expand and foster relationships, target outreach, develop metrics, share data and identify shared goals	Ongoing	
	Coordinate an agency-wide, cross-sectional approach for operational TDM programs to increase efficiencies and support a shared regional vision for TDM	Years 2-5	

Strategy EN9: **Expand transportation demand management (TDM) initiatives**

Summary and Considerations

MTC has partial authority, resources and capacity to implement this strategy through existing initiatives such as the Climate Initiatives Program, Bay Area Carpool and Vanpool Programs and the Bay Area Commuter Benefits Program. These programs provide a strong foundation upon which MTC can work to expand transportation services and alternatives that will reduce greenhouse gas emissions. That said, the overall TDM space is relatively fragmented both within MTC and across the region and there is a need for a more strategic vision to help guide regional TDM efforts. Working to establish greater consensus on shared TDM goals, more clearly defining implementation roles and responsibilities, and working to ensure more equitable implementation of TDM-based strategies will be a continued focus during the plan's implementation period.

The success of any restructured and expanded TDM programs will require ongoing partnership and collaboration with local jurisdictions, employers, workers and community-based groups, among others, many of whom expressed interest during the Implementation Plan Partnership Phase to work with MTC in support of Strategy EN9 implementation. Finally, one key TDM strategy — a regional parking fee program — will require an evaluation of authority and implementation options, some of which may present unique and specific challenges related to overall public and political support.

September 8, 2021   Agenda Item 9

Community-Based Transportation Planning Program Status Update and Evaluation Objectives

Subject:

Overview of MTC's Community-Based Transportation Planning (CBTP) program, an initiative that provides funding for community-led transportation planning in Equity Priority Communities (EPCs). Staff will review program outcomes and provide an overview of the objectives of an upcoming program evaluation.

Background:

CBTP Overview

The CBTP program was launched in 2002 as an equity-focused implementation action following the adoption of the Regional Transportation Plan in 2001. While refinements have been made over time, the main focus of the program continues to emphasize engagement with local communities to identify prioritized solutions that improve mobility needs in EPCs.

MTC Resolution No. 4316, adopted by the Commission in January 2018, establishes the guidelines for the CBTP program (Attachment B). It identified EPCs and Transportation Disadvantaged Areas (such as areas impacted by wildfires) as the target geographies for CBTPs, specified key components to include in CBTPs, and allocated nearly $1.5 million in funding from the second round of the One Bay Area Grant program (OBAG 2) to the nine Bay Area County Transportation Agencies (CTAs) based on their share of the region's population of individuals with low incomes.

MTC, CTAs, and staff from cities, transit agencies, and community-based organizations (CBOs) all have distinct roles in the CBTP effort. MTC provides funding for CBTPs and establishes guidelines. CTAs lead and oversee the CBTP process, including initiating CBTP work in eligible areas. City staff are involved in the CBTP process in various capacities, ranging from serving on advisory committees to full project management authority delegated by the CTA. Transit agency staff serve on advisory committees and are consulted about service within the CBTP geography. CBO staff also serve on advisory committees and often actively participate in the CBTP process

by facilitating engagement with community members or collecting data. The CBTP guidelines encourage CBO compensation for their efforts.

At the conclusion of the CBTP process, CTAs produce a planning document that summarizes local transportation needs, recommended solutions, potential funding sources for implementation of CBTP recommendations, and the public engagement process. CBTPs can be narrowly focused or wide-reaching. For example, the 2020 Portsmouth Square CBTP focused on safety and accessibility needs on streets immediately bordering a public plaza. The document included specific recommendations on an intersection-by-intersection basis. Alameda County's 2020 CBTP included distinct recommendations for 14 EPC agglomerations, identifying context-specific solutions for a range of places ranging from West Oakland to unincorporated areas like Cherryland.

In total, 34 communities have completed the CBTP process, 12 of which have revised their CBTPs within the last 5 years. Nine CBTPs were completed in 2020: two countywide CBTPs in Alameda and Napa counties, four CBTPs in Contra Costa County, one CBTP in San Francisco County, and two pilot participatory budgeting CBTPs in Solano and San Francisco counties. Several more CBTPs are currently underway or set to begin work soon.

CBTP Program Evaluation

MTC staff will conduct a program evaluation beginning in fall 2021, prior to adopting the next round of guidelines in 2022. The program evaluation has two primary objectives:

1) **Understand the outcomes of the CBTP process to better support implementation.** Staff will summarize the recommended solutions included in CBTPs to identify common themes and emerging issues. Additionally, staff will assess local and regional plans and funding programs to understand the degree to which CBTP recommendations are advancing to the funding and implementation stage. These analyses will inform future funding policy to support the implementation of CBTP recommendations.

2) **Identify the strengths and shortcomings of the existing CBTP process to inform the next set of guidelines**

   Staff will interview CTA, city, transit agency and CBO staff to develop a better understanding of the challenges and success factors associated with developing CBTPs. Feedback from those charged with conducting CBTP work will inform the next round of guidelines, with a goal of encouraging more efficient and thorough planning processes.

Next Steps:

The CBTP program evaluation will conclude in late 2021. Staff will brief the Policy Advisory Council on the findings of the evaluation and present draft guidelines in early 2022, prior to seeking Commission approval on the guidelines. Staff anticipates that the updated guidelines will be finalized and adopted for a future CBTP funding cycle.

Issues:

None identified.

Recommendations:

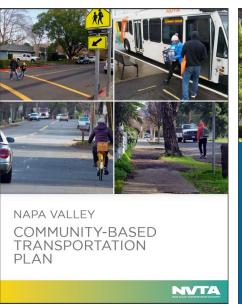Information

Attachments:

- Attachment A: PowerPoint
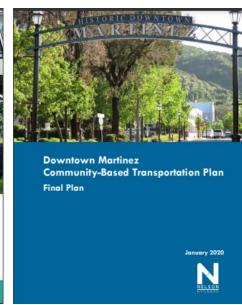- Attachment B: MTC Resolution No. 4316

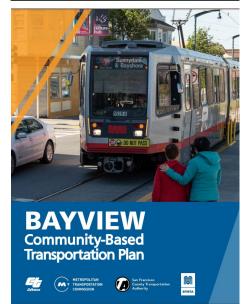# Community-Based Transportation Planning Program Update

Raleigh McCoy

September 8, 2021
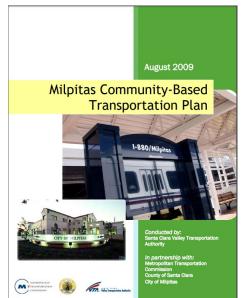
MTC Policy Advisory Council

Program Introduction

- Community-led transportation plans focused in Equity Priority Communities

- Identify transportation challenges and solutions to enhance mobility options

- Planning documents that rely on multiple funding sources for implementation

- Relevant to multiple components of the MTC Equity Platform

Guidelines

- CBTP program launched in 2002 with adopted guidelines establishing the parameters for the program (MTC Resolution 3440)

- Program guidelines updated in January 2018 (MTC Resolution 4316) with the following key changes:
  - Allocation of $1.5M in OBAG 2 funding across 9 counties, based on low-income population – *increasing funding per CBTP compared to prior guidelines*
  - Requirements for using CBTP funding – *including use-it-or-lose-it provision to encourage action and incentives for more CBO participation*
  - Eligible geographies (EPCs (then called CoCs) and locally identified Transportation Disadvantaged Areas) – *adding flexibility for CTAs*
  - Key components to include in CBTP documents – *standardizing components across plans*

- Guidelines also established the requirement for MTC to conduct a program evaluation in 2021

Roles and Responsibilities

MTC

- Provides planning funds to counties
- Establishes program guidelines
- Serves on advisory committees
- Fund recommended solutions

County Transportation Agencies

- Lead and oversee CBTP process
- Involve cities, transit agencies, and community-based organizations
- Initiate CBTP process
- Fund recommended solutions

Cities and Transit Operators

- Some cities lead and oversee CBTP process (with CTA agreement)
- Serve on advisory committees
- Fund recommended solutions

Community-Based Organizations

- Convene community members for engagement sessions
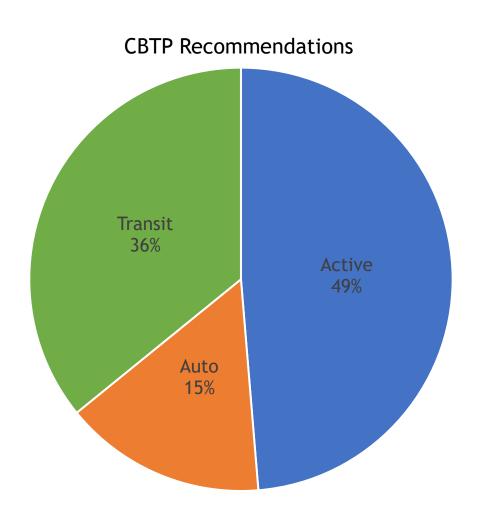- Assist with data collection and facilitation
- Serve on advisory committees

Current Status

- 34 communities have completed CBTPs

- 12 communities have revised their CBTPs

- 9 CBTPs were completed in 2020
  - Countywide CBTPs in Alameda and Napa counties
  - Participatory Budgeting pilots in Vallejo and Bayview
  - Concord, Richmond, Martinez, Pittsburg/Bay Point, and Portsmouth Square

- Several more CBTPs on the horizon for 2021

5

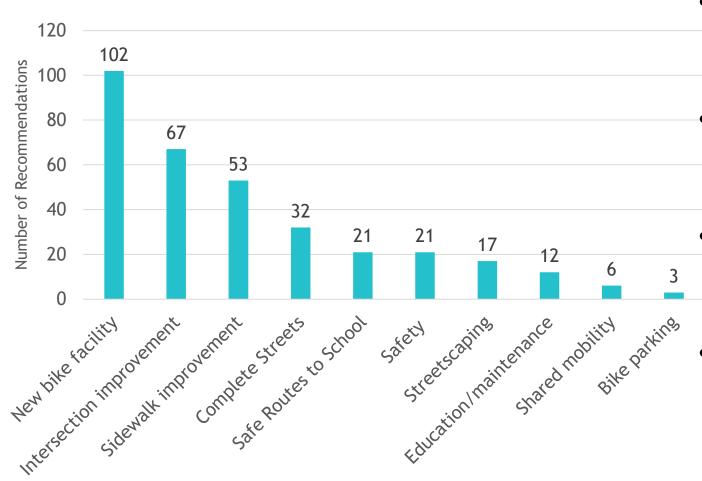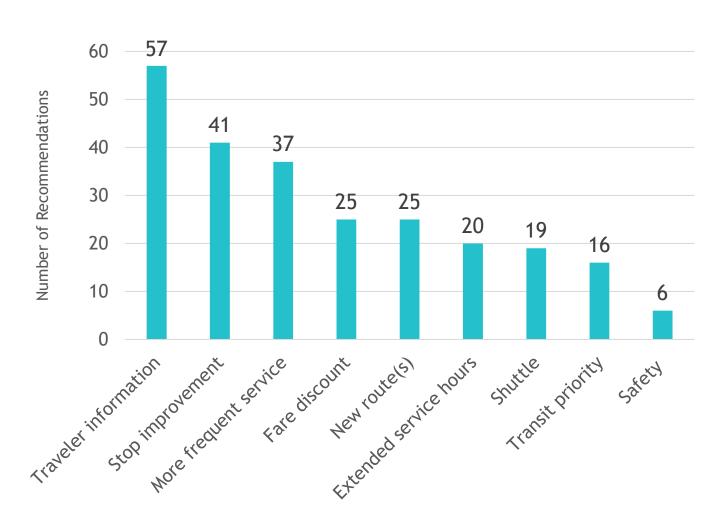# Common CBTP Recommended Solutions

CBTP Recommendations

- Active 49%
- Transit 36%
- Auto 15%

CBTP Recommendations Summary: Active Transportation

Bar chart — Number of Recommendations:
- New bike facility: 102
- Intersection improvement: 67
- Sidewalk improvement: 53
- Complete Streets: 32
- Safe Routes to School: 21
- Safety: 21
- Streetscaping: 17
- Education/maintenance: 12
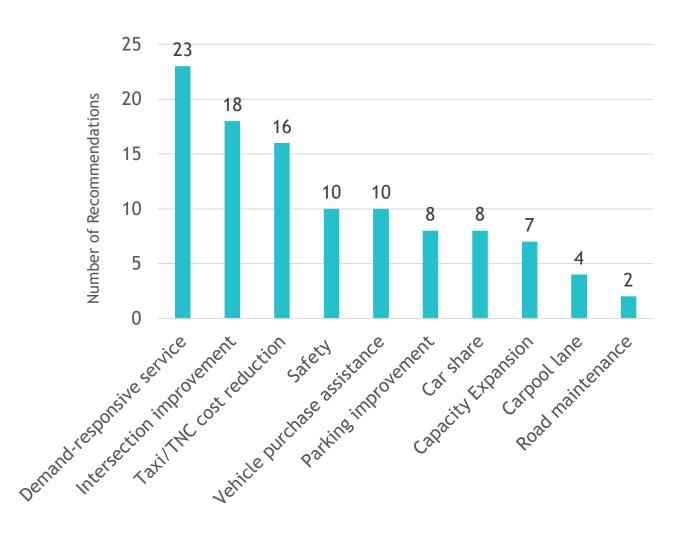- Shared mobility: 6
- Bike parking: 3

- **New bike facility:** new or extended bike lanes and multi-use paths

- **Intersection improvement:** crosswalks, pedestrian refuges, curb ramps

- **Sidewalk improvement:** new or extended sidewalks, pedestrian overcrossings, maintenance

- **Complete Streets:** road diets, traffic calming, multimodal corridor projects

CBTP Recommendations Summary: Transit

- **Traveler information:** multilingual information, real-time arrival signage, travel training
- **Stop improvement:** benches, shelters, BART station plaza enhancements
- **More frequent service:** reduce headways on existing routes
- **Fare discount:** youth passes, means-based discounts, fare integration

CBTP Recommendations Summary: Auto

- **Demand-responsive service:** vanpool, volunteer drivers for seniors or transportation to healthcare

- **Intersection improvement:** traffic signals, turning lanes, interchange improvements

- **Taxi/TNC cost reduction:** taxi vouchers, subsidized TNC trips, "TaxiScrip" programs

- **Safety:** speed bumps, striping improvements, driver education

- **Vehicle purchase assistance:** access to financing and subsidies

Program Evaluation Objectives
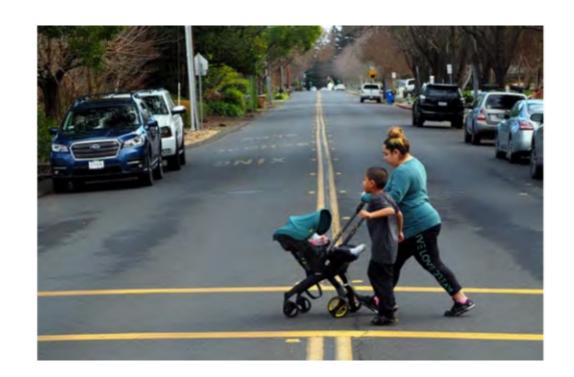
- **What are CBTP outcomes?**
  - What are the common mobility challenges and solutions identified by CBTPs?
  - Are local and county planning documents including CBTP recommendations?
  - Are CBTP recommendations receiving funding?
  - What are the barriers and success factors that influence funding and implementation of CBTP recommendations?
- **How are CBTPs produced?**
  - Where would more support or flexibility from MTC help?
  - What changes would help to reduce the time it takes to complete CBTPs?
  - What best practices could inform future guidelines?
  - How can CBTPs better align with local equity programs and priorities?

Next Steps

- Program evaluation work will occur throughout 2021

- Will return to the Policy Advisory Council in early 2022 with findings and draft implementation guidelines

- Final guidelines will be approved by the Commission in spring 2022

- Updated guidelines will be finalized and adopted for a future CBTP funding cycle

Questions?

Date: January 24, 2018
W.I.: 1311
Referred by: Planning

ABSTRACT

Resolution No. 4316

This Resolution adopts program guidelines for the 2017-2021 cycle of the Community-based Transportation Planning Program.

RE: Community-based Transportation Planning Program Guidelines - 2017-2021 Cycle

METROPOLITAN TRANSPORTATION COMMISSION

RESOLUTION NO. 4316

WHEREAS, the Metropolitan Transportation Commission (MTC) is the regional transportation agency for the San Francisco Bay Area pursuant to Government Code Section 66500 *et seq.*; and

WHEREAS, the Lifeline Transportation Network and the Environmental Justice Reports as components of the 2001 Regional Transportation Plan, identify transit needs in economically disadvantaged communities throughout the San Francisco Bay Area and recommend the initiation of community-based transportation planning as a first step to address them; and

WHEREAS, MTC established guidelines to launch and implement the Community-based Transportation Planning (CBTP) Program in 2002 in response to the recommendations outlined in the Lifeline Transportation Network and the Environmental Justice Report; and

WHEREAS, the CBTP Program has provided roughly $2.5 million in funding for over 40 collaborative planning processes in low-income communities[1] across the region since 2002; and

WHEREAS, lessons learned through the CBTP Program since the guidelines were first established in 2002 warrant updating the guidelines in advance of a new CBTP funding cycle; now therefore be it

RESOLVED, that MTC approves the guidelines for the 2017-2021 cycle of the CBTP Program, as set forth in Attachment A of this Resolution; and be it further

RESOLVED, that Attachment A of this Resolution may be amended from time to time.

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[1] MTC defined low-income communities as Communities of Concern even though the CoCs are identified using many other factors such as race/ethnicity, age (over 65 years), disability, rent burden, linguistic isolation, and vehicle ownership.

METROPOLITAN TRANSPORTATION COMMISSION

Jake Mackenzie, Chair

The above resolution was adopted by the
Metropolitan Transportation Commission
at a regular meeting of the Commission held
in San Francisco, California, on January 24, 2018.

Date: January 24, 2018
W.I.: 1311
Referred by: Planning

Attachment A
MTC Resolution No. 4316
Page 1 of 4

Community-Based Transportation Planning Program Guidelines - 2017-2021 Cycle

The following guidelines shall apply to the 2017-2021 Community-Based Transportation Planning (CBTP) Program:

1. ***Program Goals*** – in developing the CBTPs, the County Congestion Management Agencies (CMAs) must address the following two goals of the regional program:

   - Improve access and mobility for low-income communities, for commute as well as non-commute trips; and
   - Engage residents and community organizations in conducting the analysis and shaping the recommendations.

   In addition, CMAs are encouraged to consider non-traditional solutions to meet travel needs of low-income communities. Non-traditional solutions may include car share, bike share, ride-sharing, van- and/or car-pooling, and on-demand, flex-route transit, among others.

2. ***Funding allocation*** – each county shall receive a CBTP planning grant based on its share of the region's low-income population[2] (U.S. Census American Community Survey, 2015). The grants shall be limited to a maximum funding amount equal to 20 percent of the total funds, or $300,000, and a minimum of $75,000. The total funding available for the CBTP program is $1.5 million through the second round of the One Bay Area Grant Program (OBAG 2.0). Of this total, $35,000 shall be set aside by MTC for conducting a program evaluation in 2021. County allocations are laid out in the table below.

Table 1: Proposed CBTP Funding Allocation

County	Population – Low-Income Share	Low-Income – Share in Region	Low-Income Population	Funding Proportional to Low-Income Population	Adjusted CBTP Grants (max. $300,000 and min. $75,000 per county)	
Alameda	27%	23%	426,642	$337,987	$300,000	20%
Contra Costa	25%	15%	272,721	$216,051	$215,000	14%
Marin	20%	3%	49,052	$38,859	$75,000	5%
Napa	28%	2%	38,553	$30,542	$75,000	5%
San Francisco	27%	12%	225,756	$178,845	$175,000	12%
San Mateo	21%	8%	155,274	$123,009	$120,000	8%
Santa Clara	23%	22%	415,848	$329,436	$300,000	20%
Solano	30%	7%	122,735	$97,231	$95,000	6%
Sonoma	29%	8%	142,693	$113,042	$110,000	7%
Bay Area	25%	100%	1,849,272	$1,465,000	$1,465,000	100%

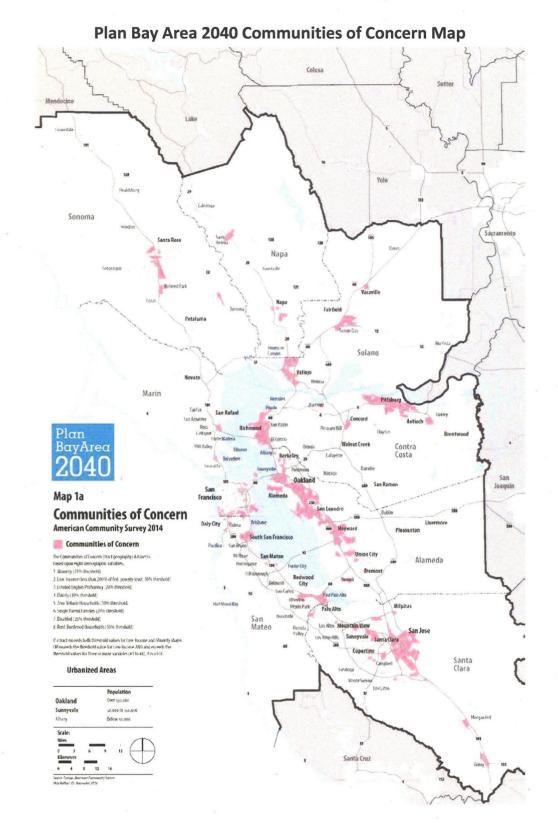*Source: U.S. Census American Community Survey, 2011-2015, 5-year average, MTC analysis*

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[2] Population in households earning less than 200 percent of the federal poverty level in 2015.

3. *Coordination with other planning efforts* – CMAs may combine CBTPs for more than one CoC, or develop a countywide plan for all CoCs. CBTPs may be developed as part of an existing planning effort (for e.g., planning for Priority Development Areas, county-wide investment and growth strategy, county-wide transportation program, or local jurisdiction general or specific plan). All program guidelines for the 2017-2021 CBTP Program shall still apply to the CBTP component of these planning efforts. If developing standalone CBTPs per CoC, CMAs may spend no more than $100,000 of the planning grant on each plan.

4. *Steering Committee* - CMAs must establish a steering committee that includes social service agency and CBO and/or non-profit representatives to ensure a collaborative and inclusive CBTP planning process.

5. *Use it or lose it provision* – CMAs shall administer the CBTP program and must initiate the planning process for each plan within nine months of executing a grant agreement (or MoU amendment) with MTC, and adopt the plan within three years of initiating the planning process. Any funds not used within this time period shall be repurposed by MTC at its discretion for other CBTPs.

6. *Local match* – CMAs must provide a ten percent match for the CBTP planning grants, which may be in the form of in-kind staff time (source of CBTP funding is the State Transit Assistance program).

7. *Incentives for community engagement* – CMAs are highly encouraged to set aside up to 10 percent of the planning grant towards direct financial support to local community-based organizations (CBOs). This funding may be used by the CBO(s) to provide services (for e.g., translation, outreach or meeting coordination) and/or to participate in the planning process (for e.g., as stipends).

8. *Eligible uses* – eligible uses for CBTP planning grants include, consultant services, direct costs or stipends associated with plan development and adoption, stakeholders engagement, and, if applicable, an implementation plan. The individual plans must be developed for MTC-designated CoCs (see map of CoCs below). CMAs may designate additional transportation disadvantaged areas (TDAs), which would also be eligible for CBTP planning grants after consideration and approval by MTC staff. The criteria for identifying additional TDAs must include at least one of the following three demographic characteristic: income, age (youth or seniors) and disability. In the North Bay, CMAs may designate areas affected by recent wildfires as a TDA. CMAs must designate TDAs before executing a grant agreement (or MoU amendment) with MTC.

9. *Prioritizing planning areas* – CMAs are encouraged to prioritize CBTPs for areas that do not currently have a plan, areas where the plan is more than 5 years old, and areas that have the highest concentration of low-income populations.

10. *Key components and deliverables* – CBTPs must include key components and deliverables identified in Table 2 below. Some components may be rolled into a broader effort (for e.g., outreach and engagement for a general plan update could count towards component A.). All components may or may not be completed at the same scale (for e.g., a countywide baseline conditions analysis and needs assessment for all CoCs may be followed by separate recommendations for each CoC).

Table 2: Key Components and Deliverables for CBTP Plans

Plan Components	Guidance and Description
A. Outreach and Engagement	Identify key stakeholders (for e.g., partner agencies, CBOs and disadvantaged/ under-represented populations), describe outreach activities (for e.g., interviews, workshops, forums, focus groups, surveys, and polls), develop multi-lingual collateral materials (for e.g., newsletters, flyers, and website), and document residents and community feedback.
B. Baseline Conditions	Create a map of the planning area (showing community facilities and amenities, major transportation infrastructure, regional context, CoCs, and if applicable TDAs), summarize demographic characteristics (current conditions and recent trends, if relevant), document existing transportation services (by mode, spatial distribution and temporal characteristics), etc.
C. Needs Assessment	Identify key local, sub-regional and regional destinations for residents and workers in CoCs and TDAs (for e.g., job centers, medical and community facilities, grocery stores, etc.), gaps in existing transportation services and infrastructure to access these destinations, and barriers to filling these gaps, etc.
D. Recommendations	Identify potential solutions, innovative approaches, or best practices from other regions; address the role of emerging technologies; and develop a prioritized list of initiatives, projects and/or programs, etc.
E. Implementation	Develop an implementation plan for key recommendations, as needed.
F. Monitoring and Evaluation	Develop a process and institute a mechanism to track progress and funding provided for implementation (for each initiative, project and/or program), establish monitoring protocols, etc.

Plan Bay Area 2040 Communities of Concern Map

Plan BayArea 2040

Map 1a
Communities of Concern
American Community Survey 2014

Communities of Concern

The Communities of Concern (tract geography) dataset is based upon eight demographic variables.

1. Minority (70% threshold)
2. Low-Income (less than 200% of fed. poverty level, 30% threshold)
3. Limited English Proficiency (20% threshold)
4. Elderly (10% threshold)
5. Zero-Vehicle Households (10% threshold)
6. Single Parent Families (20% threshold)
7. Disabled (25% threshold)
8. Rent Burdened Households (15% threshold)

If a tract exceeds both threshold values for Low-Income and Minority shares OR exceeds the threshold value for Low-Income AND exceeds the threshold values for three or more variables (#3 to #8), it is a COC.

Urbanized Areas

	Population
Oakland	Over 150,000
Sunnyvale	50,000 to 150,000
Albany	Below 50,000

Scale:
Miles
0   3   6   9   12

Kilometers
0   4   8   12   16

Source: Census, American Community Survey
Map Author: JS. November 2016

One Bay Area Grant (OBAG 3) Considerations

Subject:

OBAG 3 program considerations and development schedule.

Background:

The One Bay Area Grant (OBAG) program is the policy and programming framework for investing federal Surface Transportation Block Grant Program (STP), Congestion Mitigation and Air Quality Improvement (CMAQ), and other fund programs throughout the San Francisco Bay Area.

MTC established the OBAG program in 2013 to strengthen the connection between transportation investments and regional goals for focused growth in Priority Development Areas (PDAs), affordable housing, and greenhouse gas emissions reduction to implement the regional transportation plan. OBAG is delivered through two program components that reinforce the region's growth objectives while continuing to deliver on important regional initiatives.

- **County Program:** Working in step with Plan Bay Area, the County Program is designed to strategically invest in local transportation projects that support the implementation of the regional growth framework through community-based efforts. County program funds are invested throughout the nine-county Bay Area based, in part, on local efforts to accommodate housing growth at all income levels, while maintaining the existing transportation system.

- **Regional Program:** The Regional Program invests in ongoing transportation programs that are well-suited for regionwide implementation, as well as new initiatives and pilot efforts to advance Plan Bay Area strategies. The OBAG Regional Program has invested in a broad array of transportation priority programs, including the Climate Initiatives program, PDA planning and implementation, Priority Conservation Area (PCA) grants, Bay Bridge Forward and other highway operations improvement projects, and transit capital investment in Clipper C2 and the BART Car Replacement project. Through strategic fund exchanges, the Regional Program has also launched several innovative pilot efforts to support affordable housing, including the Transit Oriented Affordable Housing (TOAH) and Bay Area Preservation Pilot (BAPP) revolving loan funds.

OBAG 3 Considerations

Staff have identified the following set of considerations to guide the development of the OBAG 3 program framework. There is some overlap within these topic areas, however, each individual consideration provides a distinct lens for thinking about how to prioritize investments and balance trade-offs within the next round of the OBAG program.

1. **Preserve the effective features of the OBAG program to support regional objectives, with strategic adjustments.** The current approach for the County Program concentrates transportation investments within PDAs; incorporates housing factors into its funding distribution between counties, local policy requirements, and in the prioritization of projects; and relies on County Transportation Agencies (CTAs) to identify local community-based projects for funding that are consistent with regional goals.

   In 2019, the Commission directed staff to conduct an evaluation of the OBAG program. The combined PDA & OBAG Assessment project, recently completed, includes the following findings for the OBAG program framework:

   - A demonstrated strength of the County Program framework is the requirement for local jurisdictions to adopt specific housing and transportation policies. Notable examples include the requirement for a certified housing element and the adoption of a local complete streets policy.

   - The overall objectives of the OBAG program are not clearly defined in the OBAG framework resolution, presenting a challenge for ongoing program evaluation.

   - Also presenting a challenge for programmatic assessment is the significant variation in the project prioritization approaches within the County Program.

The PDA & OBAG Assessment also included an analysis of OBAG transportation investments and housing and mobility outcomes in PDAs between 2013 and 2017. The analysis found no conclusive relationship between OBAG investments and PDA outcomes over this five-year period. However, the assessment recommends continuing to focus transportation investments and planning efforts within priority growth areas, and completing a similar analysis in the future, over a longer time horizon. Additional summary findings and recommendations from the PDA & OBAG Assessment project are provided as Attachment B.

2. **Strategically advance Plan Bay Area 2050 implementation through OBAG investments and policies.** The primary objective of the OBAG 1 and 2 programs, both in the regional and county components, has been to support many of the interconnected strategies of Plan Bay Area and Plan Bay Area 2040. However, the STP/CMAQ revenues delivered through the OBAG program are relatively limited (STP/CMAQ revenues account for only 1.3% of Plan Bay Area 2050 transportation revenues) and are insufficient to make progress on any one plan strategy alone.

3. **Incorporate recent policy initiatives and adapt to the new mobility landscape.** In the years following the adoption of OBAG 2, MTC has undertaken several major policy initiatives, which, in addition to the economic and societal ramifications of the COVID-19 pandemic, will need to be taken into consideration in the development of OBAG 3. These policy actions and focus areas include connecting transportation funds to housing, the adoption of a Regional Safety/Vision Zero policy and MTC Equity Platform, the approval of an Express Lanes Strategic Plan, and forthcoming Transit Transformation Action Plan. Additional information on several of the Commission's recent policy initiatives is provided in Attachment C.

    Furthermore, there is a need to consider sustainable staffing levels within both the county and regional programs to implement continued and new initiatives.

4. **Advance equity through program policies and investments.** Adopted in 2019, MTC's Equity Platform is a framework to advance equity internally as an organization and externally through planning, funding, design, delivery, and evaluation. The OBAG 3 program provides an opportunity to advance equity with a racial justice focus by investing resources for historically underserved, systemically marginalized groups, including low-income and communities of color, at a scale to meaningfully reverse the disparities in access and mobility.

5. **Address federal planning and programming requirements.** As the federally-designated Metropolitan Planning Organization (MPO) for the Bay Area, MTC is responsible for regional transportation planning and programming efforts, including performance-based requirements. MTC's federal certification review in 2020 highlighted the need to clarify and better document MTC's roles and responsibilities for programming STP/CMAQ funding, including the areas of project selection and funding distribution processes, and the

prioritization process for CMAQ funds. Additional information on the federal requirements that will need to be addressed through the OBAG 3 program is provided in Attachment D.

Development Schedule

Staff presented these considerations to the Programming and Allocations Committee in July and received initial feedback on OBAG 3 policy and investment priorities.

At the September Council meeting, staff is seeking input on the policy priorities and desired outcomes for OBAG 3. Partner agency and stakeholder input will be sought throughout the fall, ahead of Commission action on the draft framework.

Staff is targeting a December 2021 adoption of the program framework, with the county and regional program development to follow. Additional milestones throughout the development process are provided as Attachment E.

Issues:

None identified.

Recommendations:

Information and Discussion.

Attachments:

- Attachment A: Presentation – OBAG 3 Development
- Attachment B: PDA & OBAG Assessment Summary Findings & Recommendations
- Attachment C: Recent MTC Policy Initiatives
- Attachment D: OBAG 3 Federal Requirements
- Attachment E: OBAG 3 Development Schedule

PDA & OBAG Assessment
Summary Findings and Recommendations

Background

Staff recently completed an integrated evaluation of the One Bay Area Grant (OBAG) program and progress toward achieving focused growth and reduced vehicle miles traveled (VMT) in Priority Development Areas (PDA). This document summarizes the key findings of the PDA and OBAG Assessment and outlines the policy and investment recommendations emerging from the study.

The assessment has been guided by a Technical Advisory Committee with representation from County Transportation Agencies (CTAs), the development community (BIA), local government, transit operators, and equity advocates. The findings and recommendations highlighted in this memo reflect an iterative, collaborative process between staff, a consultant team led by Community Design + Architecture, and TAC members.

The purpose of the assessment was to gain a deeper understanding of the housing and mobility outcomes in PDAs in the first years of the OBAG program, between 2013 and 2017, and to identify opportunities to refine programming policies for the OBAG 3 program to better support PDA implementation.

1. PDA Implementation: Summary Findings & Recommendations

The evaluation focused first on PDA Implementation. Findings and recommendations, shown below, are organized into three categories established in the project scope: Housing Production, Gentrification & Displacement, and Transportation Outcomes.

Housing Production

Summary Findings
- Progress toward achieving housing production targets in Plan Bay Area 2040 and in adopted local plans is uneven across the region, with wide variation based on a variety of contextual factors, particularly access to regional job centers, level of PDA-specific planning completed, real estate market conditions, and proximity to major transit investments such as BART and Caltrain stations.
- While some barriers to housing production are context-specific, others are common across the region: limited availability and high cost of land, escalating construction costs, and subsidies for affordable housing.
- The findings of the assessment echo those of the *Regional Growth Strategies Horizon Perspective Paper,* which shaped the update to the Regional Growth Framework adopted by ABAG and MTC and reflected in the Plan Bay Area 2050 Final Blueprint.

Policy & Investment Recommendations
- Continue to support local PDA plans & zoning updates that increase density and housing diversity.
- Expand regional and county funding and incentives to adopt policies that support affordable housing production and preservation, supported by regional Technical Assistance.
- Incorporate more transit rich and high resource areas to expand growth framework[1].
- Shift the location of jobs to non-traditional job centers to support growth in new market areas.
- Establish development financing plans and capital improvement plans for PDAs.
- Support targeted PDA pilot projects, such as mall reuse and the conversion of office parks to housing.

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[1] Implemented during the course of the assessment through the Plan Bay Area 2050 Blueprint.

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Gentrification & Displacement

Summary Findings
- Gentrification and displacement are a concern in communities in most PDAs throughout the region.
- There are varying degrees of affordability across the individual PDAs, although new affordable housing is more likely to be located within PDAs.
- While household incomes and the racial composition of the region remained relatively steady over the analysis period, individual PDAs experienced relatively large shifts in household incomes and racial composition.

Policy & Investment Recommendations
- Develop a comprehensive policy and funding approach supported by regional Technical Assistance to protect low-income tenants, preserve existing housing at affordable levels, and produce housing at all levels of affordability in PDAs.
    - Encourage or incentivize efforts to maximize affordability within PDAs.
    - Incentivize and support community stabilization policies tailored to the needs of cities and PDAs in different parts of the region.
- Analyze the impacts of climate change on displacement risk within PDAs, as a result of wildfires and sea level rise.
- Implement community-based transportation projects in PDAs to improve transit access and connectivity in under-resourced areas.

Transportation Outcomes

Summary Findings
- Vehicle miles traveled (VMT) per household may have increased at a faster rate within PDAs than other areas throughout the region, likely the result of demographic changes within the PDAs. However, VMT per household within PDAs is lower than in other areas of the region and workers within PDAs are more likely to take transit and less likely to drive alone for commutes, as compared to workers from other areas.
- Transit service increased in PDAs over the studied period within all counties except Marin and San Mateo. The largest percentage increase in transit service serving PDAs was seen in Solano and Sonoma counties.

Policy & Investment Recommendations
- Invest in projects that improve first-last mile access and transit connections to key destinations, with an increased focus program-wide on multimodal project types (non-SOV) within PDAs.
- Restore and increase transit service within and between PDAs to support future growth.
- Develop or expand travel demand management (TDM) programs, at a regional or countywide scale, tailored to the needs of different PDAs.
- Provide technical assistance for supportive local policies, including parking reform, VMT reduction policies, SB 743 implementation.
- Evaluate employment growth and density in PDAs.
- Collect data and monitor trends in VMT, mode choice, and other transportation metrics in PDAs over time.

2. OBAG Investments: Summary Findings & Recommendations

The second phase of the assessment focused on the effect of OBAG transportation investments on housing production and transportation outcomes within PDAs through a literature review and analysis of available data.

Summary Findings
- A literature review identified a well-documented connection between land use and transportation outcomes. For example, highway construction has been shown consistently to increase VMT while residents of transit-rich areas consistently drive less than residents of areas with more limited transit service.
- The literature review also identified a relationship between major transportation investments and development but did not find evidence that smaller transportation investments typical of OBAG projects drive housing production or spur displacement. However, multiple small projects may cumulatively shift outcomes, particularly if coupled with comprehensive policy approaches.
- Analysis of available trend data found no conclusive relationship between OBAG transportation projects and housing and mobility outcomes in nearby PDAs, but caveats apply: Investments and outcomes were evaluated within the same limited window in time (2013-2017), and travel behaviors and market conditions can take several years to shift in response to investments.

Policy & Investment Recommendations
- Continue to invest in neighborhood-scale transportation projects in PDAs that improve connectivity, transit access, and safety for all users; and couple these investments with PDA planning and supportive policies.
- Collect data to monitor and evaluate effectiveness of individual investments, in addition to completing another program wide assessment after additional years of data are available.

3. OBAG Framework: Summary Findings & Recommendations

The final phase of the assessment concluded with an evaluation of the overall OBAG program framework. The current approach for the county program focuses transportation investments within PDAs; incorporates housing factors in the distribution formula, policy requirements, and prioritization of projects; relies on CTAs to identify local projects that are consistent with regional goals.

Summary Findings
- The overall objectives of the OBAG program are not clearly defined in the OBAG framework resolution, presenting a challenge for ongoing program evaluation.
- The requirement for local jurisdictions to adopt specific housing and transportation policies to maintain funding eligibility is a demonstrated strength of the framework. Notable examples include the requirement for a certified housing element and the adoption of a local complete streets policy or compliant update to the transportation element.
- Significant variation in the project prioritization approaches within the county program present a challenge for programmatic assessment. Areas with significant variation include scoring rubrics, definitions for PDA proximate access, and the use of formulas to distribute a portion of the available funding.

Policy & Investment Recommendations
- Clarify the goals and objectives for the OBAG program.
- Continue to leverage program funds to incentivize local housing and transportation policy adoption.
- Develop a regional scoring rubric and standardized definitions for the county program to increase program effectiveness.

Detailed information is available in the PDA and OBAG Assessment technical memos available here: https://mtc.ca.gov/our-work/fund-invest/federal-funding/obag-2.

One Bay Area Grant (OBAG 3) Development
Major Policy Initiatives following OBAG 2 Adoption

Connecting transportation funds to housing: At the January 2020 Commission Workshop, Commissioners discussed various approaches for connecting transportation funding to housing outcomes. As discussed at the workshop and later formalized at the August 2020 Commission meeting, the Commission consensus was to focus MTC's future housing and transportation fund conditioning efforts within the OBAG 3 program. This consensus included:
- Requiring jurisdictions to be compliant with relevant state housing laws to be eligible for OBAG 3 funds.
- Considering using incremental funding increases to reward or incentivize housing performance.
- Considering potential adjustments to the funding split between the county and regional programs.

Additional information available here: http://mtc.legistar.com/gateway.aspx?m=l&id=/matter. aspx?key=20290

Regional Safety/Vision Zero Policy: The Commission adopted a Regional Safety/Vision Zero Policy in June 2020, in recognition of the important role that MTC can have to encourage and support equitable and data-driven actions towards the elimination of traffic fatalities and serious injuries in the Bay Area.
Additional information available here: https://mtc.ca.gov/planning/transportation/bicycle-pedestrian-micromobility/regional-safetyvision-zero

Bay Area Housing Finance Authority: The Bay Area Housing Finance Authority (BAHFA) was created by the state Legislature (AB 1487) in 2019 to lead a comprehensive regional strategy for the production, preservation, and protection of affordable housing in the region.
Additional information available here: https://mtc.ca.gov/about-mtc/authorities/bay-area-housing-financing-authority-bahfa

Equity Platform: MTC launched its Equity Platform in 2019 to advance its commitment to equity through its investments and public engagement efforts.
Additional information available here: https://mtc.ca.gov/about-mtc/what-mtc/equity-platform

Express Lanes Strategic Plan: In April 2021, the Commission adopted the Bay Area Express Lanes Strategic Plan, which links the broader Express Lanes Network purpose and goals to the strategic implementation of *Plan Bay Area 2050* through prioritization of near-term actions and longer-term policy recommendations.
Additional information available here: https://mtc.ca.gov/planning/transportation/driving-congestion-environment/mtc-express-lanes

Safe and Seamless Mobility Quick-Strike program: In June 2021, the Commission approved the program of projects for the competitive grant program to support local and regional projects that can be implemented quickly to benefit communities responding and adapting to the COVID-19 environments.
Additional information available here: https://mtc.ca.gov/funding/federal-funding/federal-highway-administration-grants/one-bay-area-grant-obag-2

Blue-Ribbon Transit Recovery Task Force: First established in response to the need to coordinate COVID-19 response and recovery efforts, in July 2021 the Task Force approved 27 specific near-term actions to re-shape the region's transit system into a more connected, more efficient, and more user-focused mobility network.
Additional information available here: https://mtc.ca.gov/about-mtc/committees/interagency-committees/blue-ribbon-transit-recovery-task-force

One Bay Area Grant (OBAG 3) Development
Federal Requirements

USDOT Certification Review

MTC's 2020 certification review included corrective actions focusing on MTC's programming processes for Surface Transportation Block Grant Program (STBG) and Congestion Mitigation Air Quality Improvement (CMAQ) program. MTC must comply with the required actions listed below by the date of adoption of the 2023 Transportation Improvement Program, anticipated for Commission approval in September 2023.

Federal Focus Areas & Required Actions
Documentation of compliance
MTC should **improve its STBG and CMAQ programming documentation to clearly demonstrate** that its programs are in full compliance with applicable federal regulations.
Use of formulas in the distribution of federal funds
The use of any formula to distribute STBG and/or CMAQ funds across geographic areas, in general, or to specific jurisdictions or modes specifically, **should be clearly communicated as to how it is based in considerations required to be addressed** as part of the metropolitan transportation planning process. Reference: Federal Regulations 23 CFR §450.126(m) states the following: *"(m) Procedures or agreements that distribute suballocated Surface Transportation Program funds to individual jurisdictions or modes within the MPA by pre-determined percentages or formulas are inconsistent with the legislative provisions that require the MPO, in cooperation with the state and the public transportation operator, to develop a prioritized and financially constrained TIP and shall not be used unless they can be clearly shown to be based on considerations required to be addressed as part of the metropolitan transportation planning process."*
Project selection authority
MTC's project selection authority for STBG and CMAQ funds should be clearly described and detailed in its programming documentation and in all programming actions to ensure that MTC is satisfying its responsibilities outlined in 23. U.S.C. 134. MTC's practice of cooperation with partner agencies, including county transportation agencies, throughout the coordinated and comprehensive planning and programming process is commendable, however, **distinctions between partnership and project selection authority must be reflected clearly** in public documentation and communication.
CMAQ process improvements
To ensure that projects deemed most effective in reducing motor vehicle emissions and congestion are programmed for early implementation in the TIP, MPOs, State DOTs, and transit agencies should **develop CMAQ project selection processes** in accordance with the metropolitan and/or statewide planning process under 23 U.S.C. 134 and 135. The selection process should involve State and/or local transportation and air quality agencies. This selection process provides an opportunity for States and/or local agencies to present a case for the selection of eligible projects that will best use CMAQ funding to meet the requirements and advance the goals of the Clean Air Act.

Federal Focus Areas & Required Actions
The CMAQ project selection process should be transparent, in writing, and publicly available. The process should identify the agencies involved in rating proposed projects, clarify how projects are rated, and name the committee or group responsible for making the final recommendation to the MPO board or other approving body. The **selection process should also clearly identify the basis for rating projects, including emissions benefits, cost-effectiveness**, **and any other ancillary selection factors** such as congestion relief, greenhouse gas reductions, safety, system preservation, access to opportunity, sustainable development and freight, reduced SOV reliance, multimodal benefits, and others. States and MPOs should fulfill this responsibility so that nonattainment and maintenance areas are able to make good-faith efforts to attain and maintain the NAAQs (National Ambient Air Quality Standards) by the prescribed deadlines. Before project selection, **an assessment of the project's expected emission reduction benefits should be completed** to better inform the MPO's selection of CMAQ projects.

Performance-Based Programming

For all federally-required targets, MTC must show that the Transportation Improvement Program (TIP) "makes progress towards achieving the performance targets" and that the TIP includes, "to the maximum extent practicable, a description of the anticipated effect of the TIP towards achieving the performance targets" (23 CFR§ 450.326). MTC must show that it is moving in the right direction based on the package of investments included in the TIP and must also describe how much of an effect the TIP investments are expected to have on the targets.

Performance-based programming requirements apply collectively all projects and programs in the TIP. However, the OBAG 3 program presents one of MTC's best opportunities to address federal performance in the TIP, given MTC's role in project selection. The table below lists all five federal performance goals areas and 29 federal performance measures. MTC will be required to document how the OBAG 3 program aligns with federal performance but is not required to address all 29 measures.

Goal Areas	General Measures	Performance Measures
Safety	Roadway Safety	1. Total number of road fatalities 2. Road fatalities per vehicle miles traveled (VMT) 3. Total number of serious injuries on roads 4. Serious injuries on roads per VMT 5. Combined total number of non-motorized fatalities and serious injuries

Goal Areas	General Measures	Performance Measures
	Safety of Public Transit Systems	6. Total number of reportable transit fatalities 7. Reportable transit fatalities per revenue vehicle miles (RVM) by mode 8. Total number of reportable transit injuries 9. Reportable transit injuries per RVM by mode 10. Total number of reportable transit safety events 11. Reportable transit safety events per RVM by mode 12. Mean distance between major mechanical failures by mode
Infrastructure Condition	Pavement Condition	13. Percentage of pavements on the Interstate in good condition 14. Percentage of pavements on the Interstate in poor condition 15. Percentage of pavements on the non-Interstate National Highway System (NHS) in good condition 16. Percentage of pavements on the non-IHS NHS in poor condition
	Bridge Condition	17. Percentage of NHS bridges by deck area classified in good condition 18. Percentage of NHS bridges by deck area classified in poor condition
	Transit Asset State of Good Repair	19. Percentage of revenue vehicles that have met or exceeded their Useful Life Benchmark (ULB) by asset class 20. Percentage of facilities within a condition rating below fair by asset class 21. Percentage of guideway directional route-miles with performance restrictions 22. Percentage of non-revenue vehicles that have met or exceeded their ULB
System Performance	Performance of the Interstate and NHS	23. Percentage of person-miles traveled on the HIS that are reliable 24. Percentage of person-miles traveled on the non-IHS NHS that are reliable 25. ~~Percent change in NHS tailpipe CO2 emissions compared to 2017 baseline~~ *(eliminated by FHWA in spring 2018)*
	Freight Movement on the Interstate	26. Interstate truck travel reliability index
Congestion Reduction	Traffic Congestion	27. Annual hours of peak-hour excessive delay per capita by urbanized area 28. Percent of non-SOV travel by urbanized area
Environmental Sustainability	On-Road Mobile Source Emissions	29. Total emissions reductions from CMAQ-funded projects by pollutant

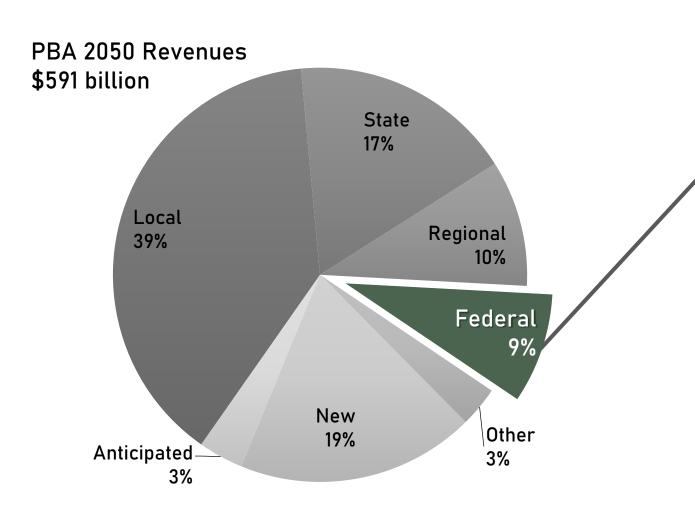One Bay Area Grant (OBAG 3) Development
Development Schedule

Date	Milestones	
Date	**Milestones**	
March – June 2021	• Development of initial considerations and approach • Initial outreach with Bay Area Partnership Board and working groups	
July	• MTC Commission – Overview and discussion	
July – September	• Develop draft program framework, including funding levels, program categories, and key policy changes	• Ongoing outreach: Bay Area Partnership, Policy Advisory Council, and stakeholders
October	• MTC Commission – Review and discussion of draft OBAG 3 program framework	
December	• ***MTC Commission – Review and approval of final OBAG 3 program framework***	
January – December 2022	• County Program – call for projects • Regional Program – program definition and programming actions	
Spring 2023	• MTC Commission – Review and approval of OBAG 3 County Program (program of projects) • Programming actions for ongoing projects/programs may be approved earlier on as-needed basis	
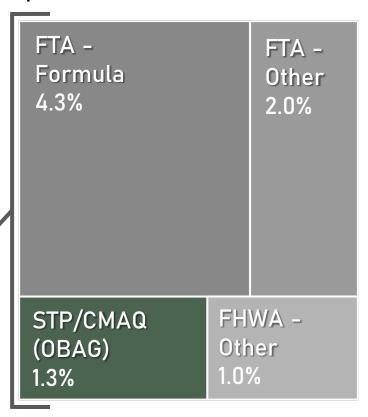
One Bay Area Grant
OBAG 3 Considerations

MTC Policy Advisory Council

September 8, 2021

San Francisco Bay From Space
Contains modified Copernicus Sentinel data (2019), processed by European Space Agency

Revenue Context
Plan Bay Area 2050

Federal Revenues
$50.8 billion

PBA 2050 Revenues
$591 billion

| FTA – Formula 4.3% | FTA – Other 2.0% |
| STP/CMAQ (OBAG) 1.3% | FHWA – Other 1.0% |

Pie chart: Local 39%, State 17%, Regional 10%, Federal 9%, Other 3%, New 19%, Anticipated 3%
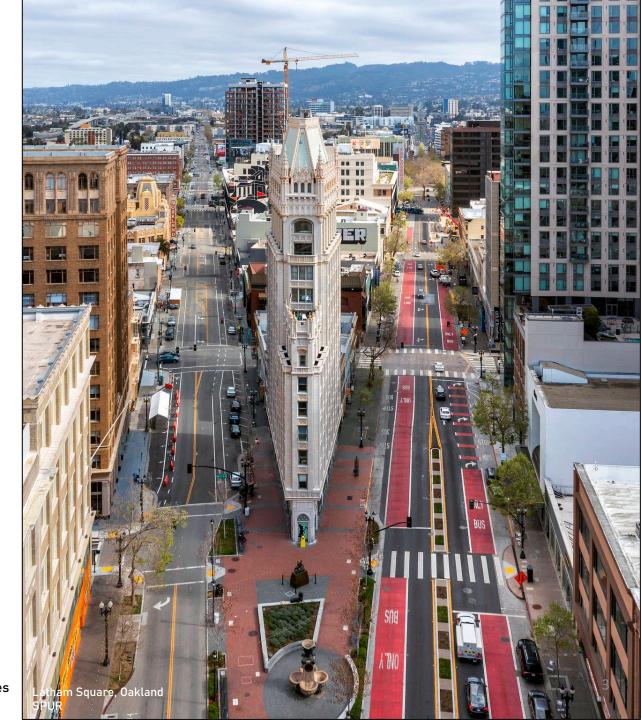
STP/CMAQ (OBAG) Revenues:

- 1.3% of *Plan Bay Area 2050* transportation revenues

- 15% of federal transportation revenues over plan period

2

One Bay Area Grant
Program Overview

❖ County program created in 2013 as block grant to enhance ongoing regional programs with targeted place-based investments (PDAs)

❖ Regional programs & county partnerships to strategically advance interconnected strategies of *Plan Bay Area*

$820M
OBAG 1
FY2013-2017

➤➤

$870M
OBAG 2
FY2018-2022

Note: OBAG 2 total does not include Safe & Seamless Mobility Quick-Strike or Regional Strategic Initiatives programs

Latham Square, Oakland
SPUR

County Program Focus
OBAG 2 Program Overview
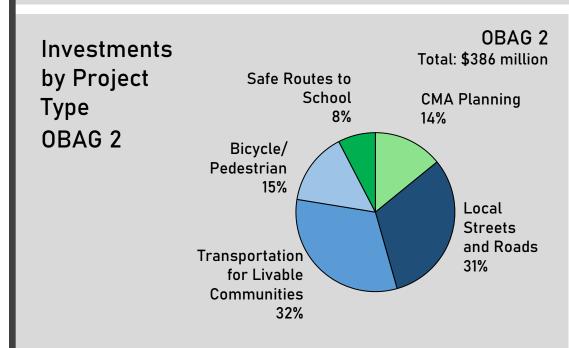
Focus Areas

- ❖ Housing connections – county formula, scoring rubrics

- ❖ Focuses investments in PDAs

- ❖ Provides flexibility for county & local priorities

- ❖ Local policy requirements (Housing Elements, Complete Streets, etc.)
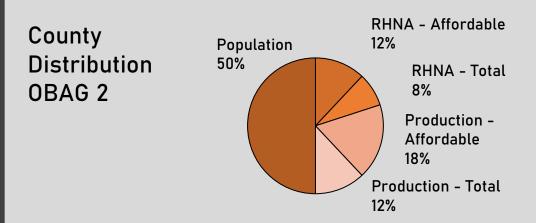
- ❖ County Program share:

OBAG 1 – 40% ≫ OBAG 2 – 45%

County Distribution OBAG 2

- Population 50%
- RHNA – Affordable 12%
- RHNA – Total 8%
- Production – Affordable 18%
- Production – Total 12%

Note: OBAG 2 county program funds were distributed between the counties based on population shares and various housing factors

Investments by Project Type OBAG 2

OBAG 2 Total: $386 million

- Safe Routes to School 8%
- CMA Planning 14%
- Bicycle/Pedestrian 15%
- Local Streets and Roads 31%
- Transportation for Livable Communities 32%

Notes: Reflects OBAG 2 county program investments by project type resulting from competitive calls for projects within each county.

Regional Program Focus
OBAG 2 Program Overview

Focus Areas

- ❖ *Plan Bay Area* commitments for focused growth and emissions reductions
  - ❖ Climate Initiatives
  - ❖ PDA Planning & PCA Grants
  - ❖ Housing Initiatives
- ❖ Implementation of Plan Bay Area strategies at regional scale
  - ❖ Transit Capital Priorities
  - ❖ Bridge Forwards programs
- ❖ Regional Program share:

OBAG 1 – 60% ≫ OBAG 2 – 55%

Regional Program	$	OBAG 2 Share
Regional Planning Activities	$10	1%
Pavement Management Program	$9	1%
PDA Planning & Implementation	$20	2%
Climate Initiatives	$23	3%
Active Operational Management	$177	20%
Transit Priorities	$189	22%
Priority Conservation Area Grants	$16	2%
Housing Initiatives	$40	5%
Total	$485	55%

Note: Total does not include Safe & Seamless Mobility Quick-Strike program or Regional Strategic Initiatives

San Pedro Square, San Jose
SPUR

24th and Mission, San Francisco
SPUR
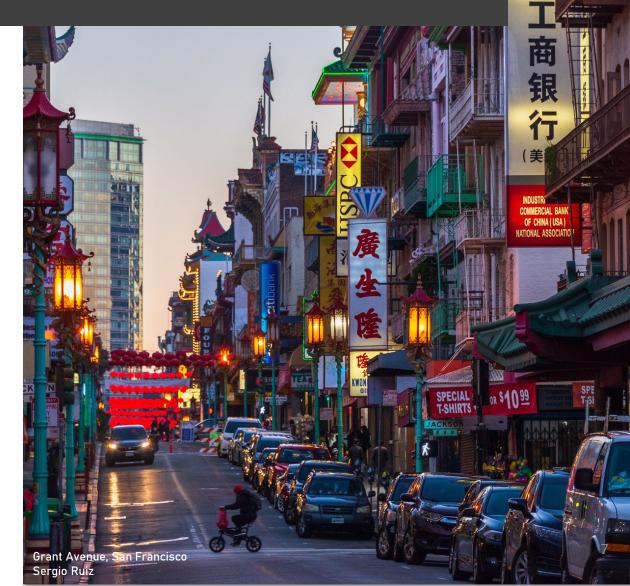
OBAG 3 Considerations

- Preserve effective program features to support regional objectives
- Advance *Plan Bay Area 2050* implementation
- Incorporate recent policy initiatives and adapt to current landscape
- Advance equity through policies and investments
- Address federal requirements, including performance & recertification

1 Preserve effective features of the OBAG program to support regional objectives

PDA & OBAG Assessment (2020–2021)

❖ Continue focusing transportation investments in priority growth areas

❖ Local policy adoption is a notable program strength (ex. certified Housing Element)

❖ Need to clarify program goals to guide program development and evaluation

❖ Significant variation in project prioritization approaches between counties

Grant Avenue, San Francisco
Sergio Ruiz

2 Strategically advance *Plan Bay Area 2050* implementation through OBAG investments and policies

Transportation

- ❖ Maintain and Optimize the Existing Transportation System *T1-T7*
- ❖ Create Healthy and Safe Streets *T8-T9*
- ❖ Build a Next-Generation Transit Network *T10-T12*

Housing

- ❖ Protect and Preserve Affordable Housing *H1-H2*
- ❖ Spur Housing Production at All Income Levels *H3-H6*
- ❖ Create Inclusive Communities *H7-H8*

Economy

- ❖ Improve Economic Mobility *EC1-EC3*
- ❖ Shift the Location of Jobs *EC4-EC6*

Environment

- ❖ Reduce Risks from Hazards *EN1-EN3*
- ❖ Expand Access to Parks and Open Spaces *EN4-EN6*
- ❖ Reduce Climate Emissions *EN7-EN9*

3 Incorporate recent policy initiatives and adapt to new mobility landscape

Celestina Garden Apartments, Sonoma
Emily Hagopian, MidPen

Commission direction on housing + BAHFA

Adoption of Equity Platform

15th Street, Oakland
Sergio Ruiz

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE

Transit recovery and transformation

BART
Sergio Ruiz

COVID-19 pandemic and travel behavior shifts

Adoption of Regional Safety/Vision Zero Policy

Market Street, San Francisco
SPUR

EXPRESS LANE
FasTrak TOLL TO
Airway Blvd / Isabel Ave $0.30
Greenville Rd $1.10
HOV 2+ WITH FasTrak NO TOLL

Adoption of Express Lanes Strategic Plan

4 **Advance equity through program policies and program investments**

MTC's Equity Platform calls for:

❖ Inclusion of historically under-represented people as central to the decision-making process

❖ Investing resources for historically-underserved, systematically marginalized groups including low-income and communities of color, at a scale to meaningfully reverse the disparities in access and mobility

Alemany Boulevard, San Francisco
Sergio Ruiz

5 Address federal planning and programming requirements

Berryessa / North San Jose Station
Noah Berger

Certification Requirements

❖ Improve documentation to demonstrate compliance

❖ Funding cannot be sub-allocated by formula, unless it is necessary to address considerations in the plan

❖ Project selection authority cannot be delegated

❖ Prioritization for CMAQ to include analysis of emissions benefits & cost-effectiveness

Performance-Based Programming

❖ Document alignment between federal performance factors (safety, asset management, etc.) and OBAG framework

❖ Incorporate performance factors in project selection process, where appropriate
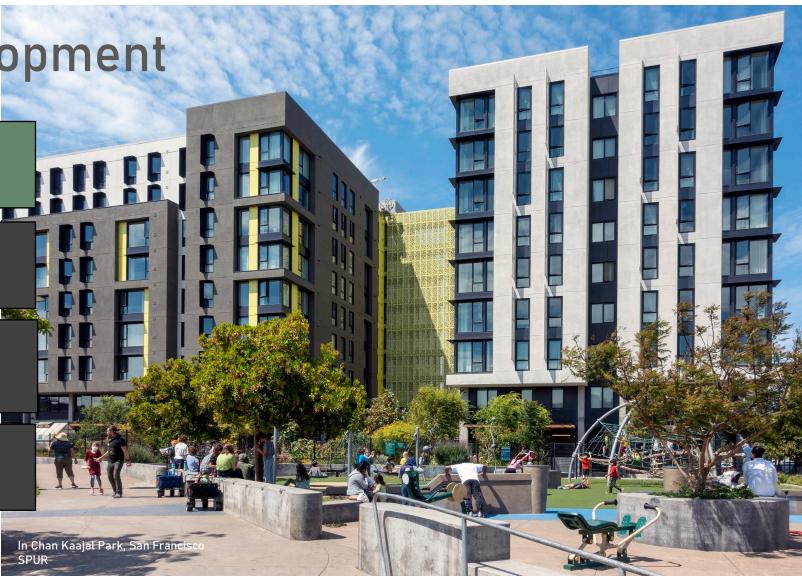
11

Next Steps
Framework Development

OBAG 3 Considerations

+ Balance & coordinate priorities across programs

+ Feedback to date

+ Partnership approach

In Chan Kaajal Park, San Francisco
SPUR

OBAG 3
Development Schedule

March–June 2021 ○	Initial considerations & Bay Area Partnership outreach
July ○	MTC Commission – Initial outreach
July – Sept. ○	Develop draft program framework & ongoing outreach
	Policy Advisory Council, Partnership working groups, BACTAs
October ○	MTC Commission – Draft program framework for review
	Policy Advisory Council, Partnership working groups, BACTAs
December ○	*MTC Commission – Final OBAG 3 framework approval*
Jan. – Dec. 2022 ○	County program call for projects development
	+ Further regional program definition

Questions?

Questions to consider:

- Are there specific policy priorities and desired outcomes for the next OBAG program?

- What is missing in these considerations?

- How can the OBAG program complement other MTC/ABAG programs or funding streams?

Contact Info:

Mallory Atkinson
matkinson@bayareametro.gov
Principal, Funding Policy and Programs

September 8, 2021   Agenda Item 11

Staff Liaison Report

Subject:

Relevant MTC policy decisions and other activities.

Issues:

None identified.

Recommendations:

Information

Attachments:

- Attachment A: Staff Liaison Report – September 2021

Staff Liaison Report – September 2021

All Aboard! Transit Agencies' New Campaign Invites Bay Area Residents to Move Forward Together

As more schools reopen for in-person learning and more businesses welcome employees back to the workplace, MTC and more than two dozen transit agencies joined forces to launch a new multi-lingual advertising campaign encouraging Bay Area residents of all ages to move forward together on the region's buses, trains, ferries and light-rail vehicles.

Using the tagline 'All Aboard Bay Area Transit,' the roughly $180,000 campaign, which is scheduled to continue into the fall, includes messaging in English, Spanish, Chinese, Vietnamese and Tagalog, using a combination of social media advertising, digital and terrestrial radio, display ads in local publications, posters in bus shelters and transit stations, and interior and exterior placards on transit vehicles. MTC and the transit agencies also have established a website, AllAboardBayArea.com, as a source for more information, including information about all participating transit agencies.

The 'All Aboard Bay Area Transit' campaign was initiated by the Blue Ribbon Transit Recovery Task Force organized by MTC in May 2020 to help guide the future of the Bay Area's public transit network in the wake of the COVID-19 pandemic. MTC Commissioner and Solano County Supervisor Jim Spering, who chaired the 32-member Task Force, noted the need to stabilize transit systems and restore ridership as the Bay Area continues its emergence from the pandemic.

"A new season is beginning," said Spering, "and our transit agencies are working together like never before to help all of us connect with the people and places we've missed."

Interstate-680 (I-680) Express Lane Opened for Business August 20

Tolling operations for the new 11-mile Express Lane along southbound Interstate 680 from Martinez through Walnut Creek began at 5 a.m. on Friday, August 20. By linking with the existing Express Lane from Rudgear Road in Walnut Creek to Alcosta Blvd. in San Ramon, this will create a continuous 22-mile southbound I-680 Express Lane through Contra Costa County.

The stretch of I-680 from Marina Vista Blvd. in Martinez to Rudgear Road currently operates as a traditional carpool lane. Tolling rules include:

- All vehicles must have a FasTrak® toll tag to use the Express Lanes;
- Carpools with two or more people, vanpools, buses and motorcycles travel toll-free with a FasTrak Flex toll tag set to the 2 or 3+ position;
- Solo drivers of eligible clean-air vehicles (CAVs) pay half-price tolls with a FasTrak CAV toll tag. Eligible CAVs are those with red, purple, orange or blue decals; and
- Other solo drivers pay the full toll to use the Express Lanes with either a standard FasTrak toll tag or a FasTrak Flex tag set to the 1 position.

Operating hours for Express Lanes are weekdays from 5 a.m. to 8 p.m. Tolls rise as traffic increases and fall as traffic declines. Digital signs over the roadway display the toll rates for various destinations. Customers always pay the toll displayed when they enter the Express Lane, even if toll rates change during their trip. Toll-paying customers pay for each toll zone they enter. There are five southbound toll zones from Martinez to San Ramon.

Express Lanes are designed to keep traffic moving reliably without congestion, and to encourage travelers to carpool or use transit to get a free and faster trip. Drivers can visit 511.org to learn everything they need to know to use Bay Area Express Lanes, how to find a carpool match, and how to sign up for FasTrak.

Transportation, Housing News Right to Your Inbox

MTC offers a convenient Daily News Headlines subscription, delivering a curated list of stories about transportation, housing, development, the environment and more directly to your email inbox. The headlines are sent each weekday, arriving just in time to enjoy with your morning coffee.

The Bay Link blog offers a more in-depth look at these topics, often in the context of the work that the Association of Bay Area Governments (ABAG) and MTC are doing, along with other stories of interest to Bay Area residents and professionals. The Bay Link Blog E-Newsletter, with the top Bay Link features of the week, is distributed every Tuesday.

Sign up for each of these newsletters , along with others from the MTC-ABAG family, including
the Plan Bay Area 2050 E-Newsletter and updates about MTC Express Lanes.

Have a Question? Ask a Librarian

If you need assistance locating information or are having difficulty navigating the MTC-ABAG
websites, please feel free to contact the MTC-ABAG head librarian, Julie Tunnell. Reference
assistance is available by telephone (415-778-5236), or email library@bayareametro.gov
Information can also be found on the MTC-ABAG library webpage.

For MTC and Plan Bay Area glossaries:

- https://mtc.ca.gov/tools-resources/mtc-abag-library/glossary-transportation-planning-acronyms-and-terms
- https://www.planbayarea.org/about/glossary

Executive Director's Report

The following items are excerpts from the July 2021 Executive Director's Report to the
Commission. To read the report in its entirety visit the Executive Director's Report webpage.

Key Updates

COVID-Related Activities

A reminder that all Covid-19 related reporting items can be found on our MTC webpage.
We provide monthly updates on all related activities, and statistics that are affecting the
region.

Draft Plan Bay Area 2050 August Webinar: What We Heard

After over three years of extensive engagement on MTC/ABAG's groundbreaking planning effort, we are pleased to invite the public to a special webinar that will review what we learned after listening to Bay Area residents during the Draft Plan Bay Area 2050 public comment period from May 26 to July 20, 2021. Staff will provide an overview of the plan's engagement process, from the Horizon initiative, to the Draft and Final Blueprint, the Draft Plan Bay Area 2050 and the Implementation Plan. Staff will also provide an extensive review of the input received during the public comment period, before discussing next steps for the Final Plan Bay Area 2050, focusing specifically on the Final Implementation Plan. We hope you will join us on Tuesday, August 17 from 9:30 to 11:00 a.m. Find details on the Plan Bay Area website.

Express Lanes

Effective July 1, 2021, the Bay Area Infrastructure Financing Authority (BAIFA) Express Lanes Operations Center integrated Alameda County Transportation Commission's (Alameda CTC's) Express Lanes Operations. Specifically, BAIFA's Regional Operations Center now provides day-to-day monitoring of express lanes on I-580 and I-680 in Alameda County in addition to BAIFA's lanes on Interstate-880 and I-680 in Contra Costa. This merger provides efficiencies and public cost savings, and promotes the goal shared by Alameda CTC and BAIFA to improve regional express lane operations by providing consistent and streamlined incident management with respect to tolling. Caltrans and CHP now have only one agency to reach out to for incident management in the east bay. BAIFA's Regional Operations Center will also provide day-to-day monitoring for express lanes US 101 in San Mateo County when the open.

Items of Note

Plan Bay Area 2050

For the month of October, there will be a joint meeting between the MTC Commission and ABAG Executive Board to take a final vote on Plan Bay Area 2050. This meeting will take place on **Thursday, October 21st at 5 pm**. It will occur during ABAG's regularly scheduled Executive Board meetings. There are several considerations that we are having to navigate in advance of this meeting that we would like to bring your attention to besides putting a "save the date" notice on your calendars.

- If the Governor rescinds Executive Order N-29-20, reversing the waivers of specific Brown Act considerations then note the following:
  - If Commissioners and Board members want to participate remotely, you must provide notice of your location 72 hours prior to the meeting.
  - We suggest that you meet at your public office or another easily accessible location.
  - You will also have to ensure that the public has <u>access</u> to this location, keeping in mind this meeting starts at 5 pm. The public must be able to hear you and your responses to this meeting to count as an acceptable location.
  - Remote Public Comment may not be available-final decision TBD
- If Executive Order N-29-20 waivers of specific Brown Act considerations are extended past the meeting date then the following will occur:
  - We will continue to hold remote meetings with public remote access

Equity On-Call Consultant Catalog

We have put together a catalog that showcases the work and past projects of the pre-qualified equity consultants on our consultant Bench. This resource will provide those who are new to the equity field as well as those who are not familiar with the consultants listed with a starting point on being able to engage and learn about the different services offered. As mentioned before, we have included contractual language that allows any agency the ability to direct select off this bench saving time and resources. The catalog is available online at the link below and a copy will be provided to all Commissioners in advance of this meeting. Also included is a link to learn more about our Equity Platform.

- [Equity Platform](#)
- [On-Call Equity Consultant Catalog](#)

New MTC Website

Check out [MTC's new and improved website](#), which launched this month. It was redesigned to improve Americans with Disabilities Act (ADA) accessibility.