

Meeting Agenda

Fare Integration Task Force

Members:

Michael Hursh, Chair **Denis Mulligan, Vice Chair**

**Michelle Bouchard, Bill Churchill, Tamara Edwards,
Carolyn M. Gonot, Daryl Halls, Beth Kranda, Carter Mau,
Therese W. McMillan, Kate Miller, Robert Powers,
and Jeffrey Tumlin**

Monday, August 15, 2022

1:00 PM

REMOTE

In light of Governor Newsom's State of Emergency declaration regarding COVID-19 and in accordance with Assembly Bill 361's (Rivas) provisions allowing remote meetings, this meeting will be accessible via webcast, teleconference, and Zoom for all participants.

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

The meeting webcast will be available at <http://mtc.ca.gov/whats-happening/meetings>. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number. Task Force Members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial *9. When called upon, unmute yourself or dial *6. In order to get the full Zoom experience, please make sure your application is up to date.

Attendee Link: <https://bayareametro.zoom.us/j/82105550493>

**Join by Telephone Dial (for higher quality, dial a number based on your current location) US:
+1 408 638 0968 or +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799
or +1 646 876 9923 or +1 301 715 8592 or 877 853 5247 (Toll Free) or 888 788 0099 (Toll Free)**

Webinar ID: 821 0555 0493

International numbers available: <https://bayareametro.zoom.us/j/82105550493>

Detailed instructions on participating via Zoom are available at:

<https://bayareametro.zoom.us/j/82105550493>

<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.

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

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

2. Chair's Introduction / Remarks - Hursh

3. Consent Calendar

- 3a. [22-1135](#) Approval of the Minutes from the May 16, 2022 Meeting

Action: Task Force Approval

Attachments: [Fare Integration Task Force Minutes from May 16, 2022](#)

4. Information

- 4a. [22-1257](#) Update on Clipper® BayPass (the Institutional Pass Pilot Program) and "No-cost / Reduced Cost Transfers" Policy Development

Update about the launch of the Clipper BayPass (the Institutional Pass Pilot Program) at educational institutions and affordable housing properties as well providing an update about the appointment of a full-time project manager to lead the operations and evaluation of Clipper BayPass. An update will also be shared with the Task Force on the development of a policy proposal for future Task Force discussion on delivering "no-cost/reduced cost transfers" in line with the Policy Vision Statement.

Action: Information

Presenter: William Bacon (MTC) and Michael Eiseman (BART)

Attachments: [Update Clipper BayPass and Transfer Policy Changes Presentation](#)

5. Public Comment / Other Business

*Task Force Members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial *9. When called upon, unmute yourself or dial *6.*

6. Adjournment / Next Meeting

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

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

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

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

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

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

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

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

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

Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 22-1135 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 6/16/2022 **In control:** Fare Integration Task Force
On agenda: 7/18/2022 **Final action:**
Title: Approval of the Minutes from the May 16, 2022 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [Fare Integration Task Force Minutes from May 16, 2022](#)

Date	Ver.	Action By	Action	Result
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Subject:
Approval of the Minutes from the May 16, 2022 Meeting

Recommended Action:
Task Force Approval

Attachments:

Meeting Minutes - Draft

Fare Integration Task Force

Members:

Michael Hursh, Chair Denis Mulligan, Vice Chair

*Michelle Bouchard, Bill Churchill, Tamara Edwards,
Carolyn M. Gonot, Daryl Halls, Beth Kranda, Carter Mau,
Therese W. McMillan, Kate Miller, Robert Powers,
and Jeffrey Tumlin*

Monday, May 16, 2022

1:00 PM

REMOTE (In person option available)

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

Present: 12 - Chair Hursh, Task Force Member Halls, Task Force Member McMillan, Vice Chair Mulligan, Task Force Member Powers, Task Force Member Tumlin, Task Force Member Kranda, Task Force Member Mau, Task Force Member Gonot, Task Force Member Bouchard, Task Force Member Churchill, and Task Force Member Edwards

Absent: 1 - Task Force Member Miller

2. Chair's Introduction / Remarks - Hursh

3. Consent Calendar

Upon the motion by Task Force Member Kranda and second by Task Force Member Tumlin, the Consent Calendar was approved. The motion carried by the following vote:

Aye: 10 - Chair Hursh, Task Force Member Halls, Vice Chair Mulligan, Task Force Member Powers, Task Force Member Tumlin, Task Force Member Kranda, Task Force Member Gonot, Task Force Member Bouchard, Task Force Member Churchill and Task Force Member Edwards

Absent: 3 - Task Force Member McMillan, Task Force Member Miller and Task Force Member Mau

3a. [22-0774](#) Approval of the Minutes from the April 6, 2022 Meeting

Action: Task Force Approval

Attachments: [03a 2022-04-18 Fare Integration Task Force Meeting Minutes Draft.pdf](#)

Task Force Members Mau and McMillan arrived after the approval of the Consent Calendar.

4. Information

- 4a. [22-0890](#) Update on the Delivery of the Institutional Pass Pilot and Transfer Policy Changes

Update on the work underway to deliver the institutional pass pilot program at educational institutions, affordable housing properties, and other employers. The team will also discuss possible future actions related to delivering changes to inter-agency transfer policies in the Next Generation Clipper system.

Action: Information

Presenter: Michael Eiseman and William Bacon

Attachments: [04ai Update Institutional Pass Pilot and Transfer Policy Changes.pdf](#)
[04aii PowerPoint Update Institutional Pass Pilot and Transfer Policy Changes.pdf](#)

Rich Hedges spoke on this item.

Aleta Dupree spoke on this item.

5. Public Comment / Other Business

6. Adjournment / Next Meeting

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

Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #:	22-1257	Version:	1	Name:	
Type:	Report	Status:		Informational	
File created:	7/22/2022	In control:		Fare Integration Task Force	
On agenda:	8/15/2022	Final action:			
Title:	Update on Clipper® BayPass (the Institutional Pass Pilot Program) and “No-cost / Reduced Cost Transfers” Policy Development				
	Update about the launch of the Clipper BayPass (the Institutional Pass Pilot Program) at educational institutions and affordable housing properties as well providing an update about the appointment of a full-time project manager to lead the operations and evaluation of Clipper BayPass. An update will also be shared with the Task Force on the development of a policy proposal for future Task Force discussion on delivering “no-cost/reduced cost transfers” in line with the Policy Vision Statement.				
Sponsors:					
Indexes:					
Code sections:					
Attachments:	Update Clipper BayPass and Transfer Policy Changes Presentation				

Date	Ver.	Action By	Action	Result
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Subject:

Update on Clipper® BayPass (the Institutional Pass Pilot Program) and “No-cost / Reduced Cost Transfers” Policy Development

Update about the launch of the Clipper BayPass (the Institutional Pass Pilot Program) at educational institutions and affordable housing properties as well providing an update about the appointment of a full-time project manager to lead the operations and evaluation of Clipper BayPass. An update will also be shared with the Task Force on the development of a policy proposal for future Task Force discussion on delivering “no-cost/reduced cost transfers” in line with the Policy Vision Statement.

Presenter:

William Bacon (MTC) and Michael Eiseman (BART)

Recommended Action:

Information

Attachments:

Clipper® Executive Board Fare Integration Task Force

August 15, 2022

Agenda Item 4a

Update on Clipper® BayPass (Institutional Pass Pilot Program) and “No-cost/Reduced Cost Transfers” Policy Development

Subject:

Update on the delivery the Clipper® BayPass (Institutional Pass Pilot Program) at educational institutions, affordable housing properties, and other employers. The team will also discuss possible future actions related to delivering changes to inter-agency transfer policies in the Next Generation Clipper® system.

Background:

Since the last Task Force meeting in May 2022, the project team has been focused on delivering the Institutional Transit Pass Pilot Program, now branded as Clipper® BayPass. Clipper® BayPass is launching today (August 15, 2022) at participant educational institutions and will in September 2022 at affordable housing properties.

The project team has significantly advanced the development of a “no-cost/reduced cost” inter-agency transfer policy. The team will continue to work with the Staff Working Group in advance of the September Task Force meeting to refine the final policy details before presenting a detailed draft for discussion and feedback starting at your September meeting.

The attached presentation will facilitate a discussion by providing more details about this work.

Recommendations:

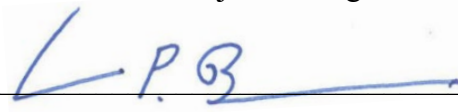
Information.

Attachments:

- Attachment A: Presentation



Michael Eiseman, Co-Project Manager, BART



William Bacon, Co-Project Manager, MTC



Fare Integration Task Force

August 15, 2022

¹Agenda Item 4a



Meeting Overview

- 1. Fare Integration Task Force Recap: Timeline/Retrospective**
- 2. Clipper BayPass Pilot Update: Recent and Upcoming Work**
- 3. Transfer discount update: Policy Proposal and Steps to Implementation**



Timeline / Retrospective of Fare Integration Work

Previous Work

February 2020: Convened Fare Integration Task Force (FITF)

September 2021: Fare Coordination & Integration Business Case released

November 2021: FITF Policy Vision Statement adopted

Today's Discussion

Institutional/Employer Pass: Clipper© BayPass pilot launched at 4 colleges/universities in August; Adding affordable housing residents starting next month; Phase 2 (employers) planned for 2023

Free/Reduced Cost Transfers: FITF reviewing draft policy; \$22.5M in regional funds identified; staff ensuring technical feasibility in C2

Future Work

All-Agency Pass: Continue to develop a proposal for implementing an all-transit agency pass product for the general public

Explore Sync of Regional Fares: Further development of a potential common fare structure for regional transit operators

Required under SB 917 (Becker), if passed and funded



Pilot Update

Pilot is underway at 4 universities/community colleges across the Bay Area



of participants: 12,000

9,000

7,000

All Students Eligible

Pilot Overview and Recent Achievements

- Clipper cards loaded with the newly branded **Clipper BayPass** product that will be made available to randomly selected students making up ~25% of the student populations
- The pass enables unlimited travel on every transit operator that uses Clipper
- MOUs have been executed with each participating institution
- Promotional materials have been developed to communicate program details to participants
- Program evaluation plan is underway



Pilot Participants

Underway



SAN FRANCISCO
STATE UNIVERSITY



SANTA ROSA
JUNIOR COLLEGE

Launching Next Month



Upcoming Work

- Ryan Reeves will start this month as a full-time project manager to oversee the pilot
- Pilot will launch at three MidPen properties in San Mateo beginning next month
- Additional MidPen properties in Alameda, Santa Clara, and Solano counties will be included shortly after
- A research and evaluation plan is underway, managed by a consultant team from The Behavioralist
- Phase 2 of the pilot will launch in 2023 to include employers across the region
- All of this work will inform the development of a more permanent program, which would be discussed by the Task Force at the appropriate time in the future

“No-cost / Reduced Cost Transfers”

“Implement no-cost and reduced cost transfers for transit users transferring between different transit agencies beginning in 2023, coinciding with the rollout of the Next Generation Clipper® system/Clipper® 2.”

Bay Area Transit Fare Policy Vision Statement
Adopted by Fare Integration Task Force, November 15, 2021

**How would
implementation of this
policy work in practice?**

**What existing fare
policies would change?**

**What is the possible financial
impact of this action?**

Recap of Steps to Deliver “No-cost / Reduced Cost Transfers”

Path to Summer 2023

- The FCIS Project Management Team is working with the Staff Working Group to bring forward a complete “No-Cost & Reduced Cost Transfer Policy Proposal” for your review next month
- Fare Integration Task Force meetings in September and October will provide an opportunity for the Task Force and members of the public to provide comments and direction on the Policy Proposal

FIRST DRAFT No-Cost
& Reduced Cost
Transfer Policy
Proposal

POLICY & PILOT DETAILS

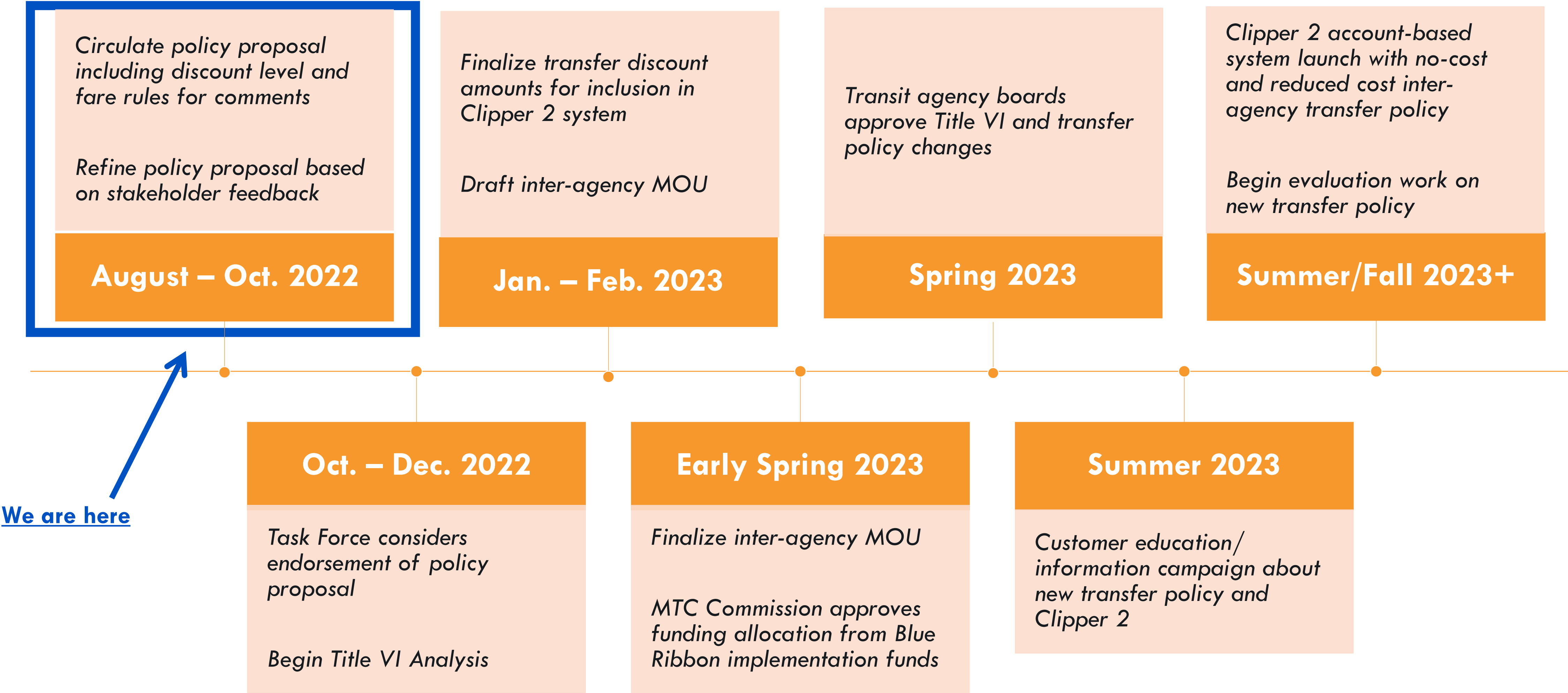
For Staff Working Group Discussion

Fare Integration Task Force
September 2022




Steps to Deliver “No-cost / Reduced Cost Transfers”

Path to Summer 2023



“No-cost / Reduced Cost Transfers”

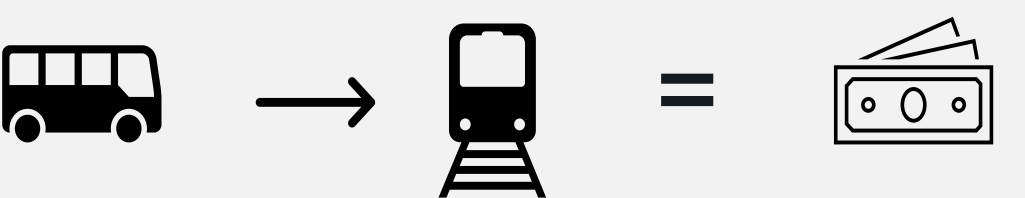
Policy proposal summary



\$2.00 \$2.50 \$2.00
Discount

For local services, discount amount is the minimum of transfer pair’s fare

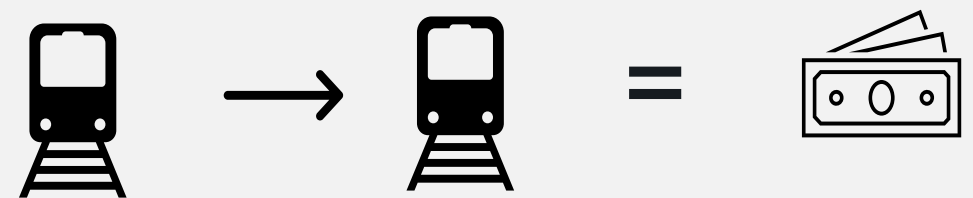
Local to Local Transfers



\$2.50 \$6.50 \$2.50
Discount

For transfers to regional services, discount is equivalent to local fare

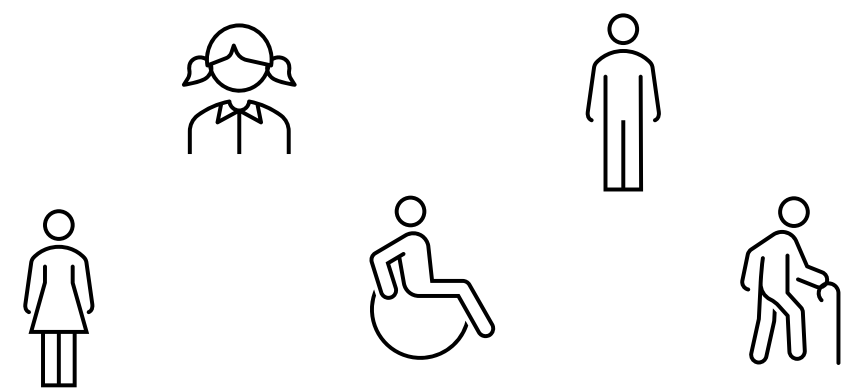
Local to Regional Transfers



\$6.50 \$5.00 \$2.15
Discount

For regional services, discount amount is minimum BART fare as discount (\$2.15)

Regional to Regional Transfers



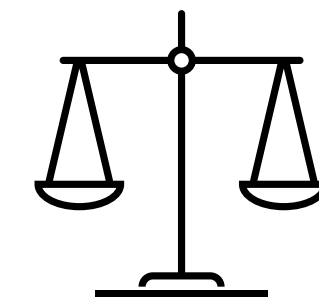
Single ride Adult Clipper fare discounted from trip, with commensurate discount for discount fare categories (e.g., Senior, Youth, etc.).



Single agency passholders also receive a discount



Transfer window is 120 minutes after first tap



For funded pilot period, no interagency settlement model is imposed



How would existing fares change?

Local to Local Transfers

Local to Regional Transfers



Regional to Regional Transfers

Example Trips Under Current Inter-Agency Transfer Policies



Example Trip 1
Excelsior District, SF to San Bruno

Local Agency #1 → **Local Agency #2**

Fare = \$2.50 Fare = \$2.05

Total Fare = \$4.55

Example Trip 2
Alum Rock, SJ to Redwood City

Local Agency #1 → **Regional Agency #2**

Fare = \$2.50 3 Zones Fare = \$7.70

Total Fare = \$10.20

Example Trip 3
12th St., Oakland to Santa Clara

Regional Agency #1 → **Regional Agency #2**

Fare = \$5.50 3 Zones Fare = \$7.70



Total Fare = \$13.20

Example Trips Under “No-cost / Reduced Cost Transfers” Policy



Example Trip 1
Excelsior District, SF to San Bruno

Local Agency #1 → **Local Agency #2**

Fare = \$2.50 Fare = \$0

Total Fare = \$2.50
Customer savings = \$2.05

Example Trip 2
Alum Rock, SJ to Redwood City

Local Agency #1 → **Regional Agency #2**

Fare = \$2.50 3 Zones Fare = \$7.70 - \$2.50

Total Fare = \$7.70
Customer savings = \$2.50

Example Trip
12th St., Oakland to Santa Clara

Regional Agency #1 → **Regional Agency #2**

Fare = \$5.50 3 Zones Fare = \$7.70 - \$2.15

Total Fare = \$11.05
Customer savings = \$2.15

How would existing fares change on three or more operators?

Example Trips
Under Current
Inter-Agency
Transfer Policies



Example Trips
Under “No-cost /
Reduced Cost
Transfers” Policy

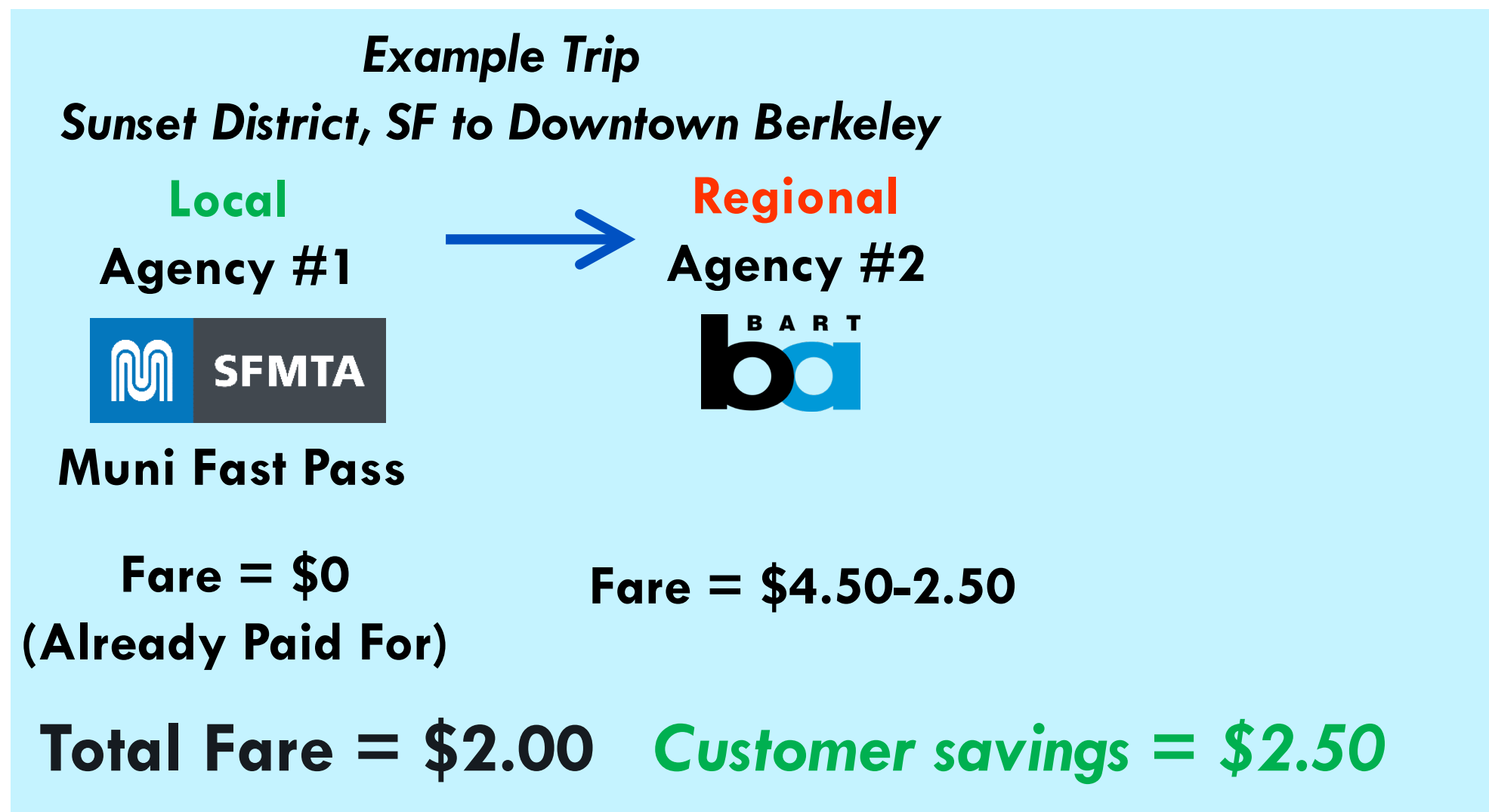


Transfer with Operator Monthly Pass Products

Example Trips Under Current Inter-Agency Transfer Policies



Example Trips Under “No-cost / Reduced Cost Transfers” Policy



Policy Issues for Consideration:

- The new transfer rules would introduce an imbalance in foregone revenue between agencies
- To adjust for this imbalance, some additional structure may be required. This could include:
 - A “settlement model” to redistribute revenue within the Clipper system
 - A new funding allocation model separate from the Clipper system



“No-cost / Reduced Cost Transfers”

Draft Transfer Discount Table, Adult Clipper (assumes agency base)

Transferring To	Transferring From														
	AC Transit	BART	Caltrain	East Bay	Golden Gate Ferry	Golden Gate Transit	Napa Solano	SamTrans	SF Muni	Union City	VTA	WETA	SMART	Corridor 101	Sonoma
AC Transit		2.15	2.15	2.00	2.15	2.00	2.00	2.05	2.25	2.00	2.25	2.15	2.15	1.50	1.50
BART	2.15		2.15	2.00	2.15	2.00	2.00	2.05	2.15	2.00	2.15	2.15	2.15	1.50	1.50
Caltrain	2.15	2.15		2.00	2.15	2.00	2.00	2.05	2.15	2.00	2.15	2.15	2.15	1.50	1.50
East Bay	2.00	2.00	2.00		2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	1.50	1.50
Golden Gate Ferry	2.15	2.15	2.15	2.00		2.00	2.00	2.05	2.15	2.00	2.15	2.15	2.15	1.50	1.50
Golden Gate Transit	2.00	2.00	2.00	2.00	2.00		2.00	2.00	2.00	2.00	2.00	2.00	2.00	1.50	1.50
Napa Solano	2.00	2.00	2.00	2.00	2.00	2.00		2.00	2.00	2.00	2.00	2.00	2.00	1.50	1.50
SamTrans	2.05	2.05	2.05	2.00	2.05	2.00	2.00		2.05	2.00	2.05	2.05	2.05	1.50	1.50
SF Muni	2.25	2.15	2.15	2.00	2.15	2.00	2.00	2.05		2.00	2.50	2.15	2.15	1.50	1.50
Union City	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00		2.00	2.00	2.00	1.50	1.50
VTA	2.25	2.15	2.15	2.00	2.15	2.00	2.00	2.05	2.50	2.00		2.15	2.15	1.50	1.50
WETA	2.15	2.15	2.15	2.00	2.15	2.00	2.00	2.05	2.15	2.00	2.15		2.15	1.50	1.50
SMART	2.15	2.15	2.15	2.00	2.15	2.00	2.00	2.05	2.15	2.00	2.15	2.15		1.50	1.50
Corridor 101	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50		1.50
Sonoma	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	

Service Type Key:

Regional-Regional

Local-Local

Local-Regional



“No-cost / Reduced Cost Transfers”

PRELIMINARY Estimated Annualized Foregone Revenue in \$ by Agency if Proposed Policy were Implemented

Agency or Clipper Agency Group	Current conditions	Pre COVID conditions
AC Transit	2,295,000	3,851,200
BART	4,293,200	9,361,600
Caltrain	282,200	597,500
East Bay	325,000	569,600
Golden Gate Ferry	143,300	356,300
Golden Gate Transit	181,700	491,600
Napa Solano	124,500	202,500
SamTrans	460,800	478,100
SF Muni	3,353,200	8,633,000
Union City	12,300	12,000
VTA	184,700	182,200
WETA	124,700	219,700
SMART	62,800	150,100
Corridor 101	200	14,300
Sonoma	100	100
Total	\$11,843,200	\$25,119,100

- Based on actual Clipper activity in May 2022 and December 2020.
- Does not assume any added fare due revenue to increased ridership resulting from policy change (FCIS business case valued at \$6M/year)
- Additional foregone revenue from the change in paratransit fares resulting from this policy estimated to be \$0.25M per year.
- This preliminary analysis will be refined with additional data through the Fall



“No-cost / Reduced Cost Transfers”

Estimated ‘Runway’ for \$22 million initial funding based on rate of growth in transfer activity

Scenario	Assume Rate of Growth	Estimated Runway (months)
No Growth	0% per month	22
Slow Growth	1 % per month	20
Moderate Growth	1.5% per month	19
High Growth	2.0% per month	18

- \$22 million of funding to cover projected revenue impacts has already been identified by MTC through the Blue Ribbon Transit Transformation Action Plan implementation funding pool.
- The period of time that this initial funding can cover will depend upon the rate of growth in transfer activity, but is estimated to be **a minimum of 18 months.**

How would implementation of this policy work in practice?



Hypothetical MOU

1. Common inter-agency transfer discount amounts
2. Process for keeping the transfers up-to-date based on fare price changes
3. Mechanism/process for financial settlement
4. Process for operators to join/leave the agreement
5. Process for Title VI analysis
6. Reference to Clipper MOU?
7. SB 917 Considerations (if applicable)

Recap: Next Steps

The FCIS Project Management Team is working with the Staff Working Group to bring forward a complete “No-Cost & Reduced Cost Transfer Policy Proposal”, consistent with what we detailed today, for your review next month.

