



# Metropolitan Transportation Commission

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

## Meeting Agenda

### Policy Advisory Council Equity & Access Subcommittee

*Jim Blacksten, Chair*  
*Daniel Saver, Vice Chair*

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Wednesday, November 14, 2018

11:30 AM

Ohlone - 1st Floor

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This meeting will be recorded. Copies of recordings may be requested at the Metropolitan Transportation Commissioner (MTC) at nominal charge, or recordings may be listened to at MTC offices by appointment.

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

2. [18-0890](#) Sustainable Communities and Climate Resilience for People with Disabilities Project
- Overview of a Caltrans Planning Grants Program.
- Action:** Discussion
- Presenter:** Drennen Shelton, Planner
- Attachments:** [02 Sustainable Communities and Climate Resilience for People with Disabilities](#)
3. [18-0812](#) Regional Means-Based Transit Fare Discount Pilot Program Update
- Update on the Means Based Transit Fare Pilot program.
- Action:** Discussion
- Presenter:** Sara Barz, Program Coordinator
- Attachments:** [03 Regional Means-Based Transit Fare Update.pdf](#)

#### **4. New Business**

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

#### **5. Public Comments / Other Business**

*Note: The subcommittee will not take action on items not listed on today's agenda.*

#### **6. Adjournment / Next Meeting**

**The next meeting of the Policy Advisory Council Equity and Access Subcommittee will be held Wednesday, December 12, 2018 at 11:30 a.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA.**

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

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

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

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

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

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

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

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

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



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 18-0890      **Version:** 1      **Name:**

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

**File created:** 10/10/2018      **In control:** Policy Advisory Council Equity & Access Subcommittee

**On agenda:** 11/14/2018      **Final action:**

**Title:** Sustainable Communities and Climate Resilience for People with Disabilities Project

Overview of a Caltrans Planning Grants Program.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [02\\_Sustainable Communities and Climate Resilience for People with Disabilities Project.pdf](#)

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

Sustainable Communities and Climate Resilience for People with Disabilities Project

Overview of a Caltrans Planning Grants Program.

**Presenter:**

Drennen Shelton, Planner

**Recommended Action:**

Discussion

**Attachments:**



METROPOLITAN  
TRANSPORTATION  
COMMISSION

**Agenda Item 2**

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

## *Memorandum*

TO: Policy Advisory Council  
Equity and Access Subcommittee

DATE: November 7, 2018

FR: Drennen Shelton, Planner

RE: Sustainable Communities and Climate Resilience for People with Disabilities Project

### **Background**

In May 2018, Caltrans awarded a \$406,000 grant, through the Senate Bill 1 Planning Grants Program, to MTC and the World Institute on Disability (WID) for the Sustainable Communities and Climate Resilience for People with Disabilities project.

People with disabilities are disproportionately low-income, transit-dependent, and more vulnerable to climate change and natural disasters. Transit agencies, planners, and first responders lack sufficient data and insight into their travel and evacuation needs, preferred modes of transportation, and vulnerabilities. The project will define the types of disabilities that are relevant to transportation policies, programs, and projects, and present a needs assessment and recommendations that are relevant to transit agencies, metropolitan planning organizations, and county congestion management agencies. Overall, this project aims to establish a new model of collaboration in which the disability community, transportation planners, service providers, emergency management agencies and partners work together to find creative and innovative solutions and establish long-term partnerships. Attachment A provides more detail on the scope of work and schedule for key elements of the project.

MTC applied for and was awarded the grant in partnership with WID. While MTC will provide oversight, WID will take the lead in demographic and data collection, community engagement, needs assessments, and the development of a policy toolkit and training materials for transportation agencies. WID is well-positioned to undertake this effort, as this organization has worked in communities worldwide to eliminate barriers to full social integration and to achieve employment, economic security and health care for persons with disabilities, and has widespread connections to disability organizations, communities and expertise in the Bay Area and beyond.

### **Next Steps**

As MTC and WID prepare for the community engagement portion of the project, staff may directly reach out to Equity and Access Subcommittee members for input. Staff will report back to and seek input from the Equity and Access Subcommittee periodically throughout the project.

### **Attachment:**

- Attachment A: Project Milestones and Schedule

**Project Milestones and Schedule**

<b>Task</b>	<b>Task Description</b>	<b>Work Products</b>	<b>Start Date</b>	<b>End Date</b>
1	Project Management and Coordination	Final project scope of work, timeline and budget; quarterly progress reports; summary memo	October 2018	March 2021
2	Demographic and Travel Data Analysis	Methodology memo for collecting data and conducting analysis; database of disability organizations and groups; county and regional profiles for people with disability; Bay Area census tract level maps; regional profile of transit and paratransit service levels, coverage, affordability, gaps, and unmet needs	October 2018	July 2019
3	Community Engagement and Needs Assessment	Meetings materials and summary notes from advisory group meetings; stakeholder engagement plan; list of meetings in Sonoma and Contra Costa counties; interview and focus group questionnaires, meeting summaries; final survey instrument; summary memo; statistics on participants	January 2019	March 2021
4	Policy Recommendations / Implementation Actions	Summary of key findings; policy framework and implementing actions; Action Plan	October 2019	November 2020
5	Education and Communication Materials	Educational materials and resource book; meeting materials and summary notes; list of meetings in Sonoma and Contra Costa counties; educational materials and resource book	June 2020	November 2020
6	Policy Toolkit / Training for Transportation Agencies	Policy toolkit and collateral materials; workshop materials and summary notes; list of meetings in Sonoma and Contra Costa counties	July 2020	February 2021



# Metropolitan Transportation Commission

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## Legislation Details (With Text)

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**File #:** 18-0812      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 9/17/2018      **In control:** Policy Advisory Council Equity & Access Subcommittee  
**On agenda:** 11/14/2018      **Final action:**  
**Title:** Regional Means-Based Transit Fare Discount Pilot Program Update  
Update on the Means Based Transit Fare Pilot program.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [03\\_Regional Means-Based Transit Fare Update.pdf](#)

Date	Ver.	Action By	Action	Result
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### Subject:

Regional Means-Based Transit Fare Discount Pilot Program Update

Update on the Means Based Transit Fare Pilot program.

### Presenter:

Sara Barz, Program Coordinator

### Recommended Action:

Discussion

### Attachments:



METROPOLITAN  
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**Agenda Item 3**  
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## *Memorandum*

TO: Policy Advisory Council  
Equity and Access Subcommittee

DATE: November 7, 2018

FR: Sara Barz, Program Coordinator

RE: Regional Means-Based Transit Fare Discount Pilot Program Update

### **Background**

For most Bay Area households, transportation is the third-largest monthly expense—trailing only the cost of housing and food. In 2015, MTC launched a study to determine if a transit-reduced fare program based on household income would be feasible and effective. As a result of the study and in consultation with transit operators, the Commission approved the launch of the Regional Means-Based Transit Fare Pilot Program (“Pilot Program”) in May 2018. The key program elements for the end-user are listed below.

### **Pilot Program Elements**

1. *Eligibility*: Adults who earn up to 200 percent of the Federal Poverty Level (approximately \$50,000 per year for a family of four) can receive the transit discount.
2. *Available on Clipper®*: Pilot Program participants will use Clipper cards to receive the new Means-Based Transit Fare discount.
3. *Participating Transit Operators*: BART, Caltrain, Golden Gate Transit and Ferry, and SFMTA will offer discounts.
4. *Single-Ride Discount*: In addition to existing Clipper discounts, Pilot Program participants will receive at least a 20 percent discount on each trip taken on the participating transit operators; SFMTA will offer a 50 percent single-ride discount for all trips taken by Pilot Program participants.

### **Program Design: Intake, Eligibility, and Pilot Program Evaluation**

At the May 2018 Commission meeting, Commissioners requested that MTC staff work with county social service and public health agencies as well as community-based organizations (CBOs) to make the program application process as easy as possible for the end user.

Since August, MTC staff have undertaken an iterative process to design the intake, eligibility, and evaluation components of the with the feedback of agency and CBO representatives. To collect feedback, MTC staff has presented on the Pilot Program concept of operations in one-on-one meetings with agency staff as well as presented at the general meetings of two Bay Area organizations: the Bay Area Regional Health Inequities Initiative and the Bay Area Social Services Consortium. In both cases, we have received very valuable feedback that has shaped elements of our concept of operations.



At the Policy Advisory Council Equity & Access Subcommittee meeting (“E&A meeting”), Pilot Program staff will present on the working version of the Pilot Program concept of operations to update the Council on the process as well as solicit for feedback to work into our program design. MTC staff plans to conduct more interviews and focus groups with CBOs into November and December. MTC staff plans to finish soliciting for feedback on the Pilot Program concept of operations by the end of 2018.

### **Next Steps**

Staff will incorporate feedback from the E&A meeting into the program design and concept of operations. After the program design phase of work concludes in December, MTC staff will present an update on the Pilot Program to the Commission in early 2019.

# Regional Means-Based Transit Fare Discount Pilot Program



# Presentation Overview

1. **Program Overview**
2. Intake and Enrollment Process
3. Eligibility Requirements
4. Desired Outcomes
5. Discussion

# Transit Affordability

- MTC has historically invested in other programs focused on supporting low-income populations.
- 24% of the population (Appx. 1.7 million Bay Area residents) live in households with incomes below 200% of the federal poverty level.
- Transportation is the 3rd largest household budget item.
- Transit Affordability:
  - Fares as a barrier
  - Range of Adult single ride fares: \$1.25 - \$16.00
  - Regional systems are most expensive (BART, GGBHTD (Bus/ Ferry), Caltrain)



# MTC Means Based Program Goals



Make transit more **affordable** for the Bay Area's low-income residents



Move toward a more **consistent regional standard** for fare discount policies



Define a transit affordability solution that is **financially viable and administratively feasible**, and does not adversely affect the transit system's service levels and performance



# Proposed Regional Means-Based Pilot Program<sup>1</sup> Framework

## Participating Agencies

- BART
- Caltrain
- Golden Gate Transit
- SFMTA (Muni)

## Eligibility

- Adults earning < 200% Federal Poverty Level (~\$50k Annual income for household of 4)

## Discount

- 20% per trip discount (50% discount on SFMTA)

## Funding

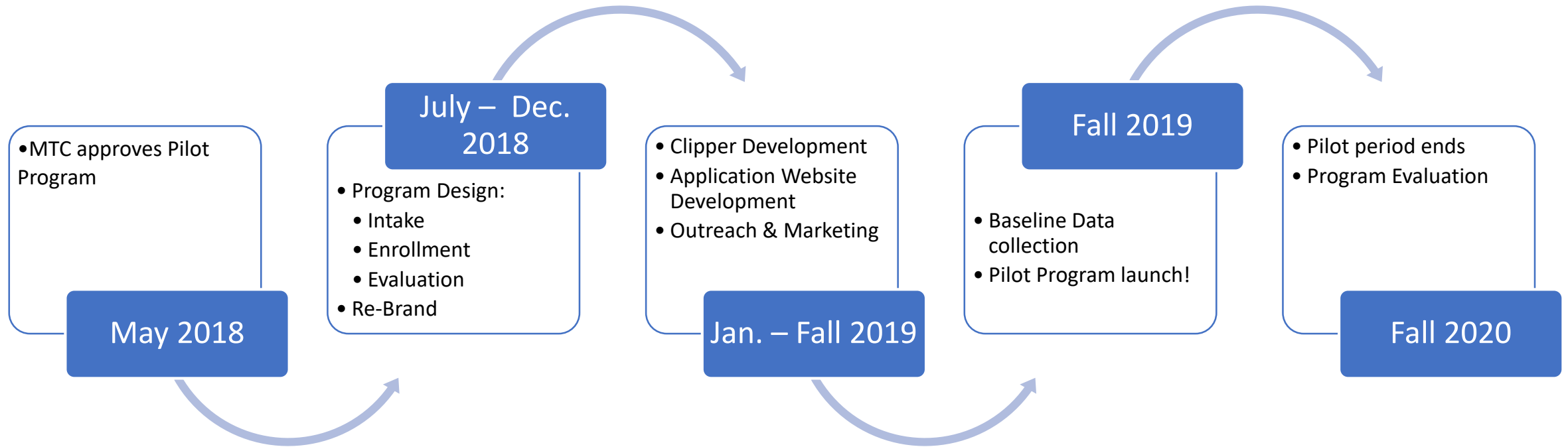
- 50/50 contribution from MTC/ transit operator for administrative costs and transit fare revenue losses (up to \$11M annually)

## Implementation

- Offered through Clipper®
- Pilot: 12 to 18 months
- Centrally administered for the region

<sup>1</sup> Program subject to cancellation if Prop. 6 passed on Nov. 6, 2018.

# Pilot Program Timeline



# Discussion Questions

## 1. Enrollment:

- a. Does the intake and enrollment process seem feasible?
- b. What role(s) should county social service/public health agencies play?
- c. What role(s) should community-based organizations play?

## 2. Eligibility:

- a. Are these the right forms of income verification?
- b. Should we request proof of residency?

## 3. Evaluation:

- a. Is this a good list of desired outcomes?
- b. Are there best practices we should be aware of?

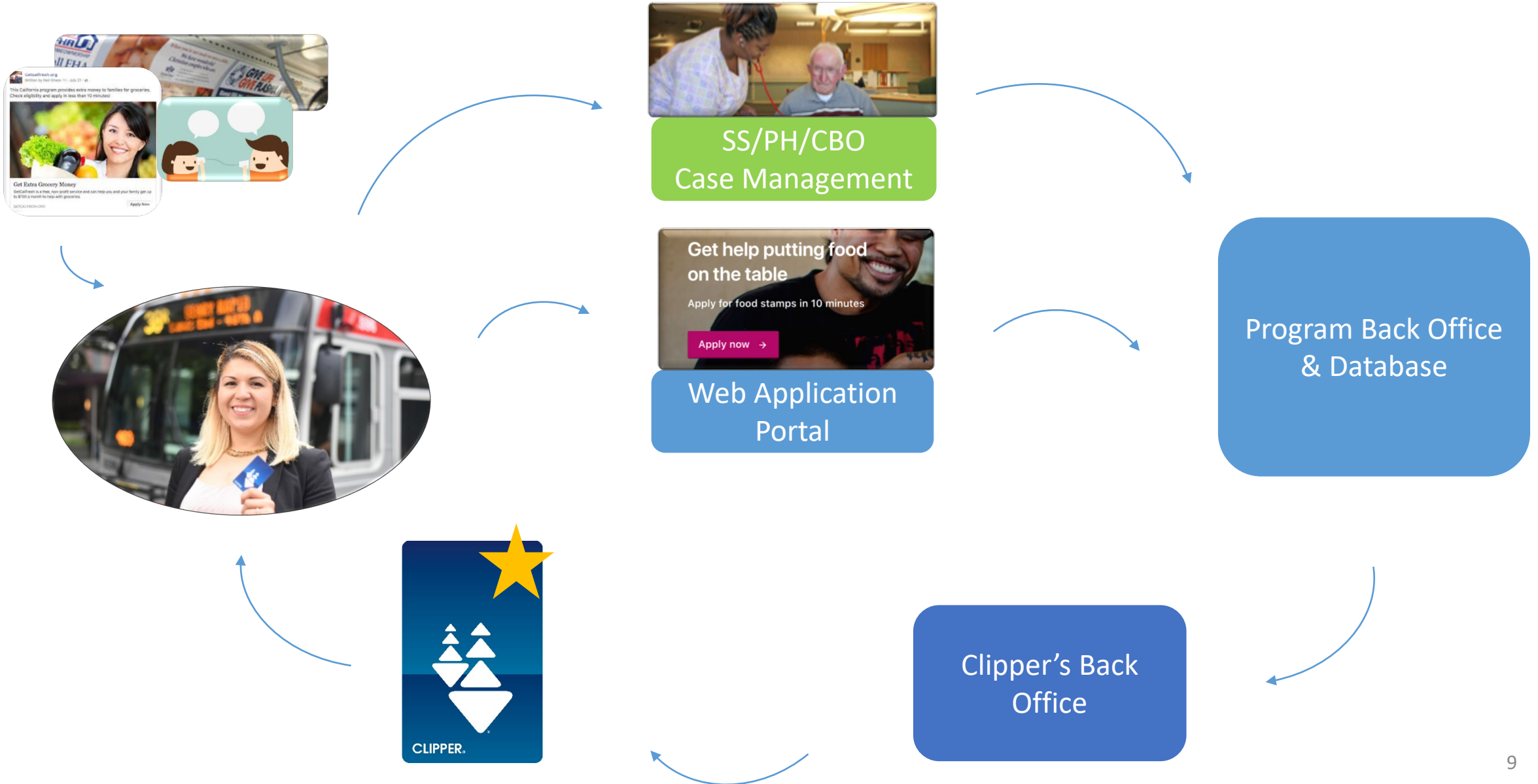
## 4. Other Feedback?



# Presentation Overview

1. Program Overview
2. **Intake and Enrollment Process**
3. Proof of Eligibility
4. Desired Outcomes
5. Discussion

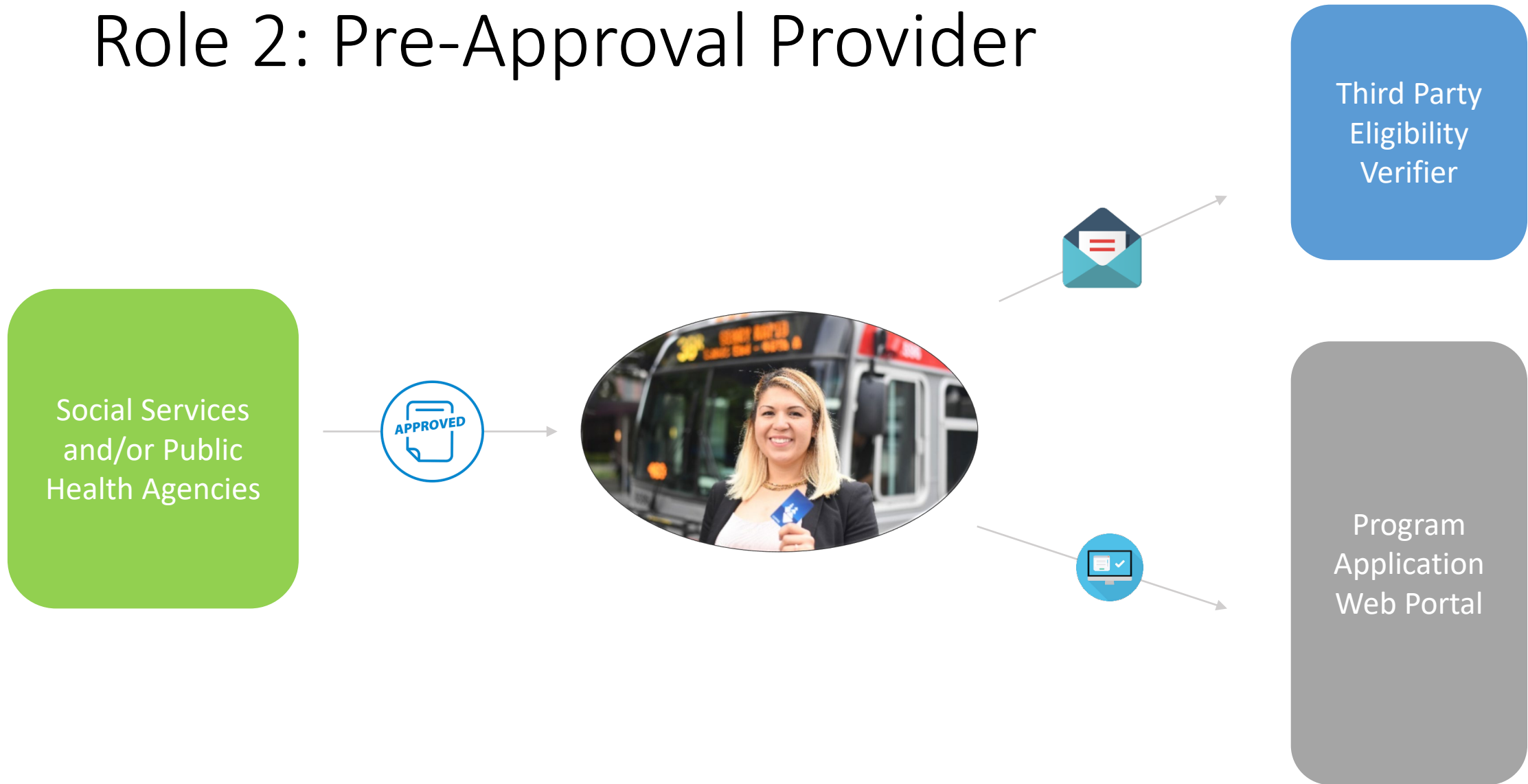
# Concept of Pilot Program Operations



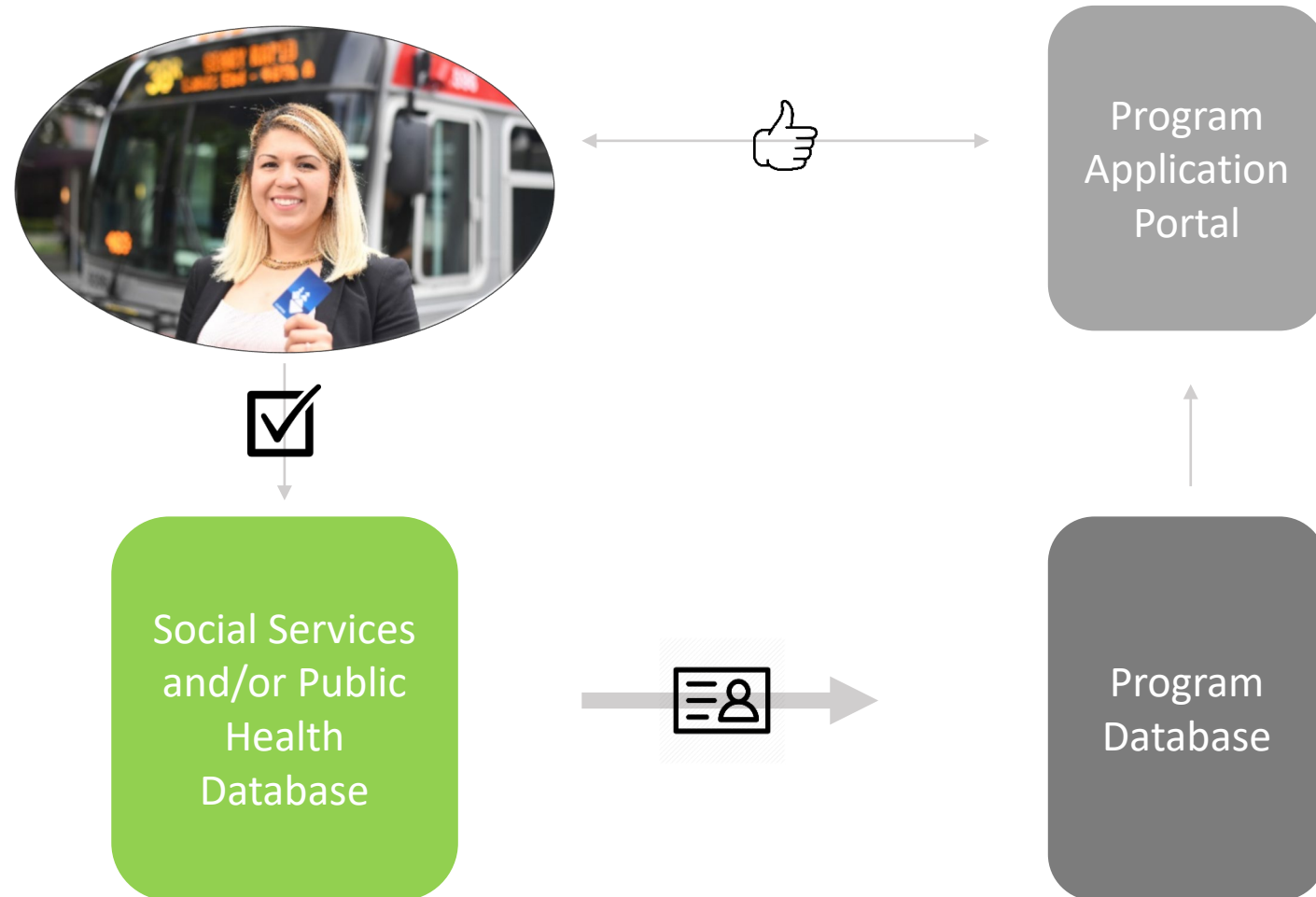
# Role 1: Program Outreach



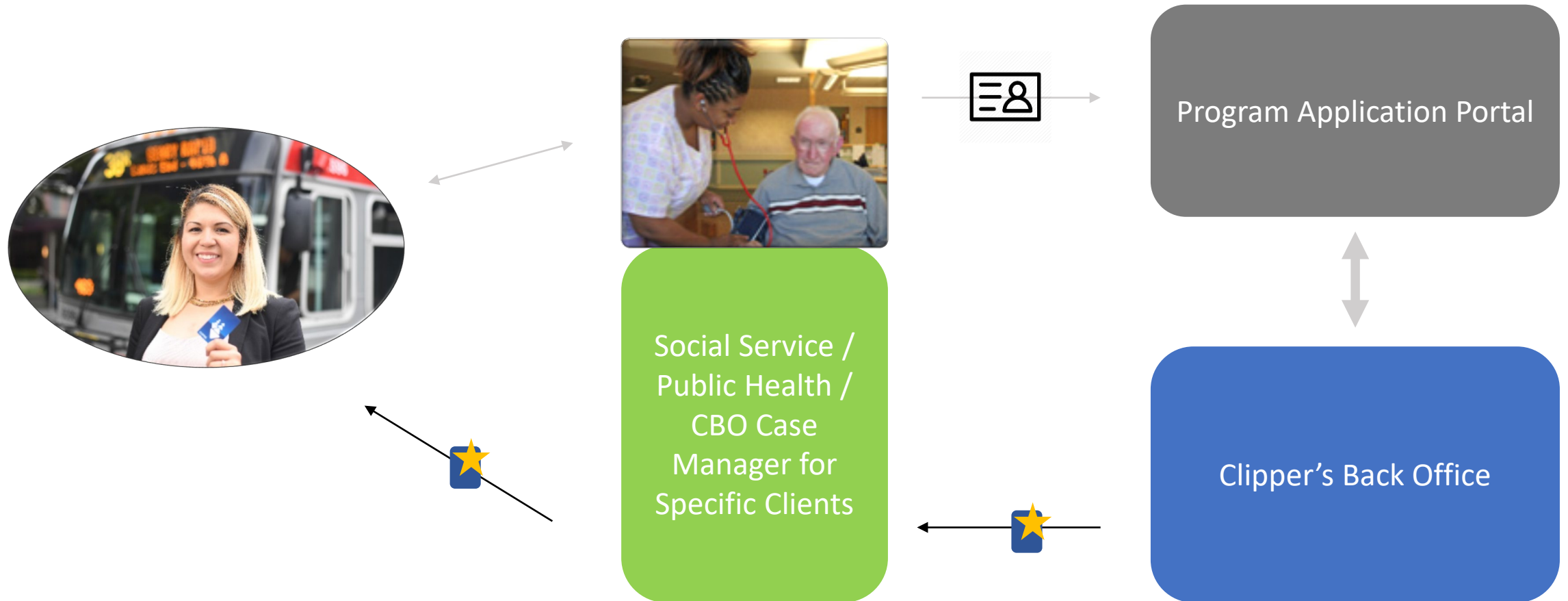
# Role 2: Pre-Approval Provider



# Role 3: Data-Sharing Partner



# Role 4: Case Management



# Pilot Program Roles for Agencies and CBOs

SOCIAL SERVICE ROLES	DESCRIPTION	PROS FOR CLIENTS	CONS FOR CLIENTS
<b>Role 1: Program Outreach</b>	<ul style="list-style-type: none"> <li>- Agencies incorporate discount into communications &amp; new materials</li> </ul>	<ul style="list-style-type: none"> <li>- Clients learn from trusted source</li> </ul>	<ul style="list-style-type: none"> <li>- Clients must apply individually</li> </ul>
<b>Role 2: Pre-Approval Provider</b>	<ul style="list-style-type: none"> <li>- Agencies can promote discount in a single batch mailer</li> <li>- Agencies may need to field questions</li> </ul>	<ul style="list-style-type: none"> <li>- Clients get a pre-approval notice from a trusted source</li> </ul>	<ul style="list-style-type: none"> <li>- Clients still must apply individually</li> </ul>
<b>Role 3: Data Sharing Partner</b>	<ul style="list-style-type: none"> <li>- Agencies' and MTC will need to sign agreements and may make database modifications</li> </ul>	<ul style="list-style-type: none"> <li>- Clients are pre-verified and their info is pre-populated</li> </ul>	<ul style="list-style-type: none"> <li>- Clients may be confused about how their info was shared</li> </ul>
<b>Role 4: Case Management</b>	<ul style="list-style-type: none"> <li>- Agencies take in information from potential clients in their routine care</li> <li>- Agencies deliver Clipper cards</li> </ul>	<ul style="list-style-type: none"> <li>- Clients get benefit from trusted source</li> </ul>	<ul style="list-style-type: none"> <li>- Clients can't troubleshoot program directly</li> </ul>

# Presentation Overview

1. Program Overview
2. Intake and Enrollment Process
3. **Proof of Eligibility**
4. Desired Outcomes
5. Discussion



# Who are trying to help?

- Adults who earn  $\leq$  200% Federal Poverty Level (~\$50k Annual income for household of 4)
- Many of these individuals are enrolled in existing benefit programs

# Income Verification

- Medi-Cal or EBT benefit
- Copy of current 1040 and W2
- Certified form from authorized partner agency (for those without access to other proof)



# Identity Verification

- Government issued photo identification card with current address
- SF City ID
- Other (list to be developed)



# Presentation Overview

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# Why Conduct an Evaluation?



Research, Program  
Design, and  
Implementation

- Produce research that helps our region better understand and respond to issues of affordability, economic mobility, and equity



Fiscal Management

- Build evidence about what works to reduce poverty and improve mobility so the region can allocate resources to more effective strategies, and;



Operational  
Coordination

- Apply data, technology, and service design to facilitate more holistic and effective service delivery.

# Program Desired Outcomes

## IMPLEMENTATION

### AWARENESS



Customers report awareness of the program

### CUSTOMER EXPERIENCE



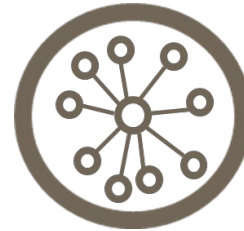
Program elements are easily accessible to all qualified customers

### FINANCIALLY VIABLE



Providing the 20% discount is financially feasible for transit operators and the region

### ADMINISTRATIVELY FEASIBLE



Management, implementation, and evaluation is administratively feasible

## IMPACT

### AFFORDABILITY



Participants are less burdened by transportation costs.

### INCREASED ACCESS



Participants have increased access to get to opportunities including jobs, school, social or recreational activities, healthy food, etc.

# Presentation Overview

1. Program Overview
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5. **Discussion**

# Discussion Questions

## 1. Enrollment:

- a. Does the intake and enrollment process seem feasible?
- b. What role(s) should county social service/public health agencies play?
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## 2. Eligibility:

- a. Are these the right forms of income verification?
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## 3. Evaluation:

- a. Is this a good list of desired outcomes?
- b. Are there best practices we should be aware of?

## 4. Other Feedback?



# Thank you

Sara Barz

Means-Based Fare Discount Pilot Program Manager

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