

## **Meeting Agenda**

### **Fare Integration Task Force**

**Members:**

***Jim Hartnett, Chair      Michael Hursh, Vice Chair***

***Nuria Fernandez, Daryl Halls, Therese W. McMillan, Kate Miller,  
Denis Mulligan, Robert Powers, Rick Ramacier, Nina Rannells,  
Michael Tree, and Jeffrey Tumlin***

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**Monday, June 22, 2020**

**1:05 PM**

**Board Room - 1st Floor (REMOTE)**

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The Fare Integration Task Force will meet on Monday, June 22, 2020 at 1:05 p.m., in the Bay Area Metro Center (Remotely). In light of Governor Newsom's State of Emergency declaration regarding the COVID-19 outbreak and in accordance with Executive Order N-29-20 issued by Governor Newsom on March 17, 2020 and the Guidance for Gatherings issued by the California Department of Public Health, the meeting will be conducted via webcast, teleconference, and Zoom for Task Force members who will participate in the meeting from individual remote locations.

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

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

**Attendee Link: <https://bayareametro.zoom.us/j/98433218020>**

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

**Webinar ID: 984 3321 8020**

**International numbers available: <https://bayareametro.zoom.us/u/asH063Kfh>**

**Detailed instructions on participating via Zoom are available at:**

**<https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom>**

Members of the public may participate by phone or Zoom or may submit comments by email at [info@bayareametro.gov](mailto:info@bayareametro.gov) by 5:00 p.m. the day before the scheduled meeting date. Please include the committee or board meeting name and agenda item number in the subject line. Due to the current circumstances there may be limited opportunity to address comments during the meeting. All comments received will be submitted into the record.

## 1. Roll Call / Confirm Quorum

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

## 2. Chair's Introduction / Remarks - Hartnett

## 3. Consent

- 3a. [20-0892](#) Minutes from the February 24, 2020 Meeting

Action: Task Force Approval

Attachments: [3a FITF Minutes 02-24-2020.pdf](#)

## 4. Information

- 4a. [20-0893](#) Fare Coordination/Integration Study and Business Case Project Update and Discussion of Concept Project Problem Statement

Update on the progress of Fare Coordination/Integration Study and Business Case as well as discussion by the Task Force of a concept draft problem statement.

Action: Information

Presenter: William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

Attachments: [4a Update Problem Statement.pdf](#)

- 4b. [20-0894](#) Fare Coordination/Integration Study and Business Case Project Timeline

Updated project timeline including details on future meetings of the Fare Integration Task Force, the Policymaker Forum on Fare Coordination/Integration, and the MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration.

Action: Information

Presenter: William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

Attachments: [4b FCIS Timeline.pdf](#)

## **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.*

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

**The next meeting of the Fare Integration Task Force will be Monday, August 17, 2020 at 1:05 p.m. at the BART Board Room, 344 20th Street, 3rd Floor, Oakland, CA 94612 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](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 Titulo VI:** La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

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

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

# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 20-0892      **Version:** 1      **Name:**  
**Type:** Minutes      **Status:** Consent  
**File created:** 5/28/2020      **In control:** Fare Integration Task Force  
**On agenda:** 6/22/2020      **Final action:**  
**Title:** Minutes from the February 24, 2020 Meeting  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [3a FITF Minutes\\_02-24-2020.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Minutes from the February 24, 2020 Meeting

**Recommended Action:**  
Task Force Approval

**Attachments:**

375 Beale Street, Suite  
800  
San Francisco, CA 94105

## Meeting Minutes - Draft

### Fare Integration Task Force

**Members:**

*Jim Hartnett, Chair      Michael Hursh, Vice Chair*

*Nuria Fernandez, Daryl Halls, Therese W. McMillan, Kate Miller,  
Denis Mulligan, Robert Powers, Rick Ramacier, Nina Rannells,  
Michael Tree, and Jeffrey Tumlin*

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Monday, February 24, 2020

1:00 PM

San Francisco Bay Area Rapid Transit District  
344 20th Street, 3rd Floor  
Oakland, CA 94612  
BART Board Room

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#### 1. Roll Call / Confirm Quorum

**Present:** 7 - Chair Hartnett, Vice Chair Hursh, Task Force Member McMillan, Task Force Member Mulligan, Task Force Member Ramacier, Task Force Member Rannells, and Task Force Member Tumlin

**Absent:** 5 - Task Force Member Fernandez, Task Force Member Halls, Task Force Member Miller, Task Force Member Powers, and Task Force Member Tree

Franklin Wong acted as a delegate and voting member of the Task Force in place of Nuria Fernandez. Actions noted below as "Fernandez" were taken by Wong.

Ron Grassi acted as a delegate and voting member of the Task Force in place of Daryl Halls. Actions noted below as "Halls" were taken by Grassi.

Rebecca Schenck acted as a delegate and voting member of the Task Force in place of Kate Miller. Actions noted below as "Miller" were taken by Schenck.

Jennifer Yeamans acted as a delegate and voting member of the Task Force in place of Michael Tree. Actions noted below as "Tree" were taken by Yeamans.

Pamela Herhold acted as a delegate and voting member of the Task Force in place of Robert Powers. Actions noted below as "Powers" were taken by Herhold.

#### 2. Chair's Introduction / Remarks - Jim Hartnett

### 3. Information

#### 3a. [20-0356](#) Overview of the Fare Coordination / Integration Study and Business Case

Overview of the Fare Coordination/Integration Study and Business Case.

**Action:** Informational

**Presenter:** William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

**Attachments:** [3ai Update Feb TaskForce.pdf](#)

Ken Bukowski spoke on this item.

### 4. Approval

#### 4a. [20-0358](#) Contract - Project Technical Support - Fare Coordination / Integration Study and Business Case - Steer (Not to Exceed \$888,231)

A request for recommendation that the MTC Administration Committee approve a contract award with Steer to provide professional planning and analytical support, and to conduct user experience research for the Fare Coordination/Integration Study and Business Case in an amount not to exceed \$888,231.

**Action:** Refer to MTC Commission for Approval.

**Presenter:** William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

**Attachments:** [4a Contract Steer FareCoordination SummarySheet.pdf](#)

Adina Levin of Seamless Bay Area and Friends of Caltrain spoke on this item.

Ken Bukowski spoke on this item.

**Upon the motion by Vice Chair Hursh and second by Task Force Member Tumlin, the Contract - Project Technical Support - Fare Coordination / Integration Study and Business Case - Steer (Not to Exceed \$888,231) was unanimously approved. The motion carried by the following vote:**

**Aye:** 12 - Chair Hartnett, Vice Chair Hursh, Task Force Member Fernandez, Task Force Member Halls, Task Force Member McMillan, Task Force Member Miller, Task Force Member Mulligan, Task Force Member Powers, Task Force Member Ramacier, Task Force Member Rannells, Task Force Member Tree and Task Force Member Tumlin

**5. Public Comment / Other Business**

**6. Adjournment / Next Meeting**

**The next meeting of the Fare Integration Task Force will be Monday, April 13, 2020 at 1:00 p.m. at the Caltrain/SamTrans Auditorium, 1250 San Carlos Avenue, 2nd Floor, CA 94070**



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 20-0893      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 5/28/2020      **In control:** Fare Integration Task Force  
**On agenda:** 6/22/2020      **Final action:**  
**Title:** Fare Coordination/Integration Study and Business Case Project Update and Discussion of Concept Project Problem Statement

Update on the progress of Fare Coordination/Integration Study and Business Case as well as discussion by the Task Force of a concept draft problem statement.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4a Update Problem Statement.pdf](#)

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

Fare Coordination/Integration Study and Business Case Project Update and Discussion of Concept Project Problem Statement

Update on the progress of Fare Coordination/Integration Study and Business Case as well as discussion by the Task Force of a concept draft problem statement.

**Presenter:**

William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

**Recommended Action:**

Information

**Attachments:**

# Fare Integration Task Force

June 22, 2020

Agenda Item 4a

## Fare Coordination/Integration Study and Business Case Project Update and Discussion of Concept Project Problem Statement

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- Subject:** Update on the progress of Fare Coordination/Integration Study and Business Case as well as discussion by the Task Force of a concept draft problem statement.
- Background:** At its last meeting in February 2020 the Fare Integration Task Force recommended the award of a consultant contract to a team led by Steer to work with agency staff on the Fare Coordination/Integration Study and Business Case. The MTC Administration Committee voted to formally award the contract to Steer at its meeting on March 11, 2020.
- Due to the impacts of the COVID-19 pandemic the project team was not able to begin work on the Fare Coordination/Integration Study and Business Case until May. The Co-Project Managers have been working with the Steer consultant team, which is primarily based in Toronto, through virtual platforms. The project team and Steer hosted a virtual project kickoff workshop with the Staff Working Group on May 27, 2020 with the goal of developing a concept problem statement to guide the project over the coming months.
- Discussion:** Coming out of the kickoff workshop the project team developed a draft concept project problem statement which serves as a hypothesis to test through the review and analysis of key issues identified within it. As these issues are studied and feedback is provided, the statement will be refined and include key data points and a strengthened narrative.

The project team is seeking feedback from Task Force members on the below draft concept problem statement:

### *Problem Statement Context*

The Bay Area Transportation System was developed over previous decades to address past challenges and to support a high quality of life in the region. In recent years, the Bay Area has grown into an integrated cultural and economic center that is home to nearly 8 million people who live, work, and pursue education and recreation across nine counties.

The region's transportation system, shaped by past needs, has not kept up with the needs of today's travelers. Transit ridership has stagnated, while highway congestion and greenhouse gas emissions have grown. If these trends continue, the region will not meet its stated policy goals for quality of life, prosperity, equity, and environmental sustainability.

Several factors influence whether a person chooses to use transit: of central importance are transit service reliability, frequency, coverage, and connectivity; land use and development patterns; as well as the price relative to other travel options. The legibility and convenience of the fare payment system may also be an important consideration for some travelers. Relative to regions where transit is used most frequently, Bay Area travelers face challenges in each of these areas.

In addition, the COVID-19 pandemic has had severe impacts on Bay Area transit. Since February 2020, ridership and operating revenues have dropped sharply, forcing deep service cuts. Bay Area transit operators and MTC are implementing a transit system recovery plan that will prioritize safety and restore service in response to growing demand as the regional recovery proceeds and as funding allows.

*Problem Hypothesis (to be tested and revised)*

Fare policy is one among several factors that have constrained the growth of transit ridership in recent years. Current fare policies are informed by funding and governance models that incentivize locally focused fares and may not maximize ridership for the region as a whole. As a result, Fare Coordination and Integration may have a role to play both in restoring transit ridership and supporting recovery from the COVID-19 pandemic and delivering the transportation system the Bay Area needs for its coming decades of growth.

*How does the current state of Fare Coordination and Integration impact travelers and limit ridership?*


This project will evaluate how fares impact ridership and contribute to the key problems that detract from rider experience:

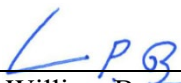
Issues	Challenges to Investigate
<b>1. Customer Value</b> Current fare policies can lead to a disconnect between the fare charged and the value a customer places on their trip	<ul style="list-style-type: none"> <li>Trips pricing may be unfair and discourage use (two trips on similar modes or similar distances have difference prices)</li> <li>Trips may have arbitrary price increases (Example a double fare)</li> <li>Mismatch between the perceived quality of a trip and the price (trying to get at the quality of rolling stock for example)</li> </ul>
<b>2. Payment Experience</b> Current fare products, passes, payment technologies, and payment experiences may not be legible	<ul style="list-style-type: none"> <li>The existing product offer does not facilitate or encourage multi-agency trips or multi-agency trip making</li> <li>Trips using multiple agencies may require extra time to plan or understand</li> </ul>
<b>3. Equity</b> Current fares may not consistently meet the needs of vulnerable populations	<ul style="list-style-type: none"> <li>The varied approaches to fares provided to vulnerable populations may make some trips challenging or not possible on transit</li> <li>Current fares and fare products may require significant upfront expenditure that make frequent transit use difficult</li> </ul>
<b>4. Future Transit</b> Current fares may not optimize the ridership and benefits of proposed transportation investments	<ul style="list-style-type: none"> <li>Infrastructure and service enhancement investments may underperform if they cannot function as part of a cohesive integrated network</li> </ul>

**Issues:** The impacts of COVID-19 affect how the project will approach the important user research components of the scope of work. The project team is working to reconsider that scope and revise the approach. User research is essential for assessing the relative importance of fare changes vs. other barriers to transit.

**Recommendation:** Information item for Task Force discussion and feedback.

**Attachment:** Presentation slides.

  
\_\_\_\_\_  
Michael Eiseman, Director of Financial Planning, BART

  
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William Bacon, Policy and Financial Analyst, MTC

# Fare Coordination/Integration Study and Business Case

## Project Update

## Problem Statement and Project Timeline

June 22, 2020

Fare Integration Task Force





# **Project Status Update Summary**

**In February 2020, the Fare Integration Task force (FITF) and MTC approved contract award for the Fare Coordination/Integration Study and Business Case (FCIS) project to Steer.**

**Since February, the COVID-19 pandemic halted social and economic activity and Bay Area transit operators now face an unprecedented ridership and revenue crisis.**

**In response, MTC created the Blue Ribbon Transit Recovery Task Force (BTRTF) to guide the future of the Bay Area's public transportation network, on which several FITF members and project stakeholders serve.**

**The impacts of COVID-19 affect how we can approach user research. The project team is working to reconsider that scope and revise the approach. User research is essential for assessing the relative importance of fare changes vs other barriers to transit.**

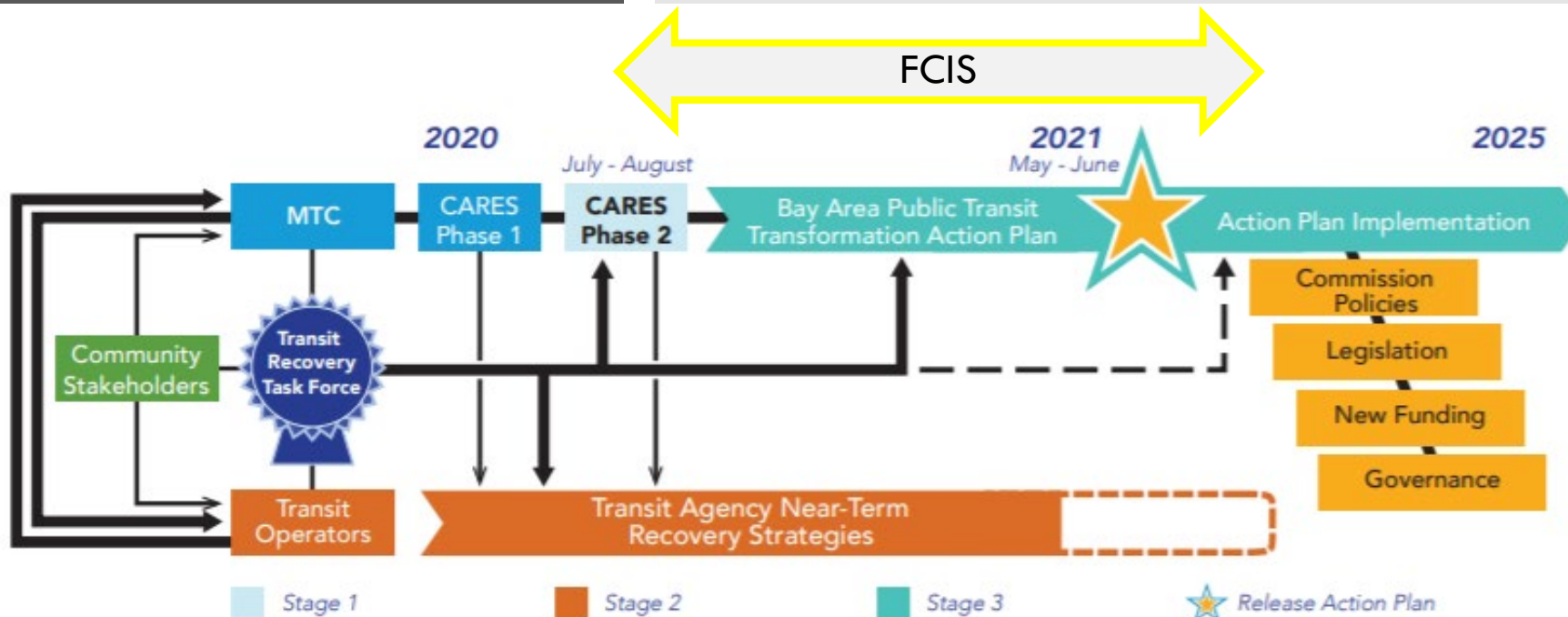
**Working with Steer, the Staff Working Group co-led by BART and MTC charted a path forward for the project in light of new circumstances, bringing two items today for discussion and endorsement:**

**4a. Project Problem Statement**

**4b. Project Timeline**

# FCIS Role in Regional Recovery

- The FCIS is well-positioned to effectively lead discussion of fare coordination and integration strategies in the context of regional recovery.
- The FCIS serves to inform the third stage of the BRTTF's work, advancing long-term improvements to regional connectivity, which aligns with the project timeline.
- Our selected consulting team brings outstanding expertise in this policy area and in the region to achieve optimal outcomes.
- The project structure, shown in the appendix, is designed to incorporate extensive input from transit riders, non-riders, and key stakeholders.



steer



ARUP



# Framing the FCIS Problem Statement

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The problem statement shown in this presentation is a draft subject to input and iteration from the Fare Integration Task Force and other stakeholders.

It synthesizes key ideas in order to present a clear, concise, and compelling platform for studying fares in greater detail.

**It can be considered as a hypothesis to test** through the review and analysis of the key issues identified within it.

As these issues are studied and feedback is provided, the statement will be refined and include key data points and a strengthened narrative.



# Problem Statement (Pt. 1)

The Bay Area Transportation System\* was developed over previous decades to address past challenges and to support a high quality of life in the region. In recent years, the Bay Area has grown into an integrated cultural and economic center that is home to nearly 8 million people who live, work, and pursue education and recreation across nine counties.

The region's transportation system, shaped by past needs, has not kept up with the needs of today's travellers. Transit ridership has stagnated, while highway congestion and greenhouse gas emissions have grown. If these trends continue, the region will not meet its stated policy goals for quality of life, prosperity, equity, and environmental sustainability.

Several factors influence whether a person chooses to use transit: of central importance are transit service reliability, frequency, coverage, and connectivity; land use and development patterns; as well as the price relative to other travel options. The legibility and convenience of the fare payment system may also be an important consideration for some travellers. Relative to regions where transit is used most frequently, Bay Area travelers face challenges in each of these areas.

In addition, the COVID-19 pandemic has had severe impacts on Bay Area transit. Since February 2020, ridership and operating revenues have dropped sharply, forcing deep service cuts. Bay Area transit operators and MTC are implementing a transit system recovery plan that will prioritize safety and restore service in response to growing demand as the regional recovery proceeds and as funding allows.

*\*The Bay Area Transportation system includes infrastructure, service, policies/regulations, and decision making processes for all modes.*

# Problem Statement (Pt. 2)

**Project Hypothesis:** Fare policy is one among several factors that have constrained the growth of transit ridership in recent years. Current fare policies are informed by funding and governance models that incentivize locally focused fares and may not maximize ridership for the region as a whole. As a result, Fare Coordination and Integration may have a role to play both in restoring transit ridership and supporting recovery from the COVID-19 pandemic and delivering the transportation system the Bay Area needs for its coming decades of growth.

## How does the current state of Fare Coordination and Integration impact travelers and limit ridership?

**This project will evaluate how fares impact ridership and contribute to the key problems that detract from rider experience:**

- 1. Customer Value** – Current fare policies can lead to a disconnect between the fare charged and the value a customer places on their trip.
- 2. Payment Experience** – Current fare products, passes, payment technologies, and payment experiences may not be legible.
- 3. Equity** – Current fares may not consistently meet the needs of vulnerable populations.
- 4. Future Transit** – Current fares may not optimize the ridership and benefits of proposed transportation investments.

# Problem Statement (Pt. 3)

Issues	Challenges to Investigate
<b>1. Customer Value</b> Current fare policies can lead to a disconnect between the fare charged and the value a customer places on their trip	<ul style="list-style-type: none"><li>• Trips pricing may be unfair and discourage use (two trips on similar modes or similar distances have difference prices)</li><li>• Inter-agency trips may have arbitrary price premiums</li><li>• There may be a mismatch between the perceived quality of a trip and the price (trying to get at the quality of rolling stock for example)</li></ul>
<b>2. Payment Experience</b> Current fare products, passes, payment technologies, and payment experiences may not be legible	<ul style="list-style-type: none"><li>• The existing product offer does not facilitate or encourage multi-agency trips or multi-agency trip making</li><li>• Trips using multiple agencies may require extra time to plan or understand</li></ul>
<b>3. Equity</b> Current fares may not consistently meet the needs of vulnerable populations	<ul style="list-style-type: none"><li>• The varied approaches to fares provided to vulnerable populations may make some trips challenging or not possible on transit</li><li>• Current fares and fare products may require significant upfront expenditure that make frequent transit use difficult</li></ul>
<b>4. Future Transit</b> Current fares may not optimize the ridership and benefits of proposed transportation investments	<ul style="list-style-type: none"><li>• Infrastructure and service enhancement investments may underperform if they cannot function as part of a cohesive integrated network</li></ul>

# Draft Research Plan (Pt. 1)

Issue	Research Topics	Key Questions	Data Sources
<b>1. Customer Value:</b> Current fare policies can lead to a disconnect between the fare charged and the value a customer places on their trip.	Fare policy audit - collect information on all fare policies in the region, including prices and rules by traveler type	<ul style="list-style-type: none"> <li>• What are the range of fares used by agencies in the region?</li> <li>• What are the operating costs and revenues for each agency?</li> </ul>	Agency websites and policy documents
	Inter-agency transfer availability and prices for multiagency trips	<ul style="list-style-type: none"> <li>• What types of transfers have transfer discounts and which ones have double fares?</li> </ul>	Agency websites and policy documents
	Market segmentation to identify fares paid, distance travelled, and volume of trips taken in key geographic markets by service type used	<ul style="list-style-type: none"> <li>• What are the key travel markets and modes in the region in the region?</li> <li>• Based on mode and market:               <ul style="list-style-type: none"> <li>○ How much revenue and ridership is generated?</li> <li>○ What distances do customers travel?</li> <li>○ What are typical travel times?</li> <li>○ How much do customers pay per mile travelled?</li> <li>○ What are average fares?</li> </ul> </li> </ul>	Regional travel surveys, clipper data, regional transit model
	Ridership trends over time with respect to fares and service changes	<ul style="list-style-type: none"> <li>• How has ridership by market and agency changed over time?</li> <li>• How does this align with changes in fares, service, and expansion of the network?</li> </ul>	Historic ridership and clipper data
	Agency fare strategy discussions	<ul style="list-style-type: none"> <li>• What are the key goals, factors, and considerations agencies take into account when setting fares?</li> </ul>	Interviews
	User research to understand how customers perceive the price of their trips	<ul style="list-style-type: none"> <li>• How do customers perceive the current fare structure and its prices?</li> <li>• Where and when are fares a barrier to further transit use?</li> </ul>	User research

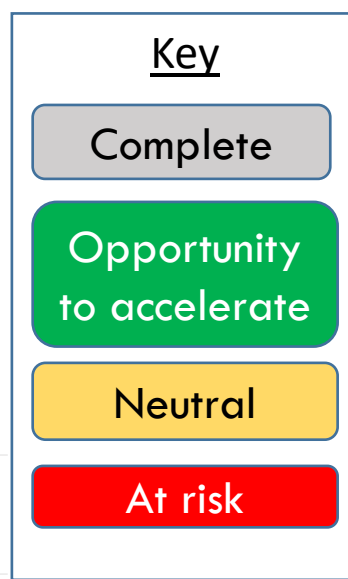
# Draft Research Plan (Pt. 2)

Issue	Research Topics	Key Questions	Data Sources
<b>2. Payment Experience:</b> Current fare products, passes, payment technologies, and payment experiences may not be legible	Pass and product audit	<ul style="list-style-type: none"> <li>• What passes are offered?</li> <li>• How much revenue is generated by them?</li> <li>• How many trips are generated?</li> <li>• How have passes evolved over the past decade?</li> </ul>	Agency websites and policy documents
	Fare technology audit	<ul style="list-style-type: none"> <li>• How is the existing technology being used?</li> <li>• What are its limitations and strengths?</li> <li>• What are future directions?</li> </ul>	Agency websites and policy documents, interviews
	User research on satisfaction with current product offer	<ul style="list-style-type: none"> <li>• How do customers perceive the existing product offer?</li> </ul>	User research
	User experience mapping	<ul style="list-style-type: none"> <li>• How do customers perceive the existing payment experience by product type, agency, and trip?</li> </ul>	User research
	Agency product and user experience strategies	<ul style="list-style-type: none"> <li>• How does the payment experience connect to the broader transit experience?</li> <li>• What works well, what are the pain points, and what could be improved?</li> </ul>	User research

# Draft Research Plan (Pt. 3)

Issue	Research Topics	Key Questions	Data Sources
<b>3. Equity:</b> Current fares may not consistently meet the needs of vulnerable populations	Equity assessment	<ul style="list-style-type: none"> <li>• How do the challenges from issues 1 and 2 impact vulnerable populations?</li> <li>• What are unique challenges that these populations face?</li> </ul>	Agency website and policy review, user research
	Equity fares and products	<ul style="list-style-type: none"> <li>• What approaches are taken by each agency for equity fares?</li> <li>• What products are available?</li> </ul>	Agency website and policy review, interviews
	Agency equity strategies	<ul style="list-style-type: none"> <li>• Is equity considered as part of the fare strategy or part of another strategy?</li> <li>• What are the priorities for equity for the agency?</li> </ul>	Interviews
<b>4. Future Transit:</b> Current fares may not optimize the ridership and benefits of proposed transportation investments	Planned and in-delivery transit service and infrastructure expansion	<ul style="list-style-type: none"> <li>• What are the key projects under consideration and are there potential fare barriers? What impact will these barriers have on the success of the project?</li> </ul>	Policy review and interviews

# Tentative Project Timeline



Spring/Summer  
2020

Summer/Fall  
2020

Winter/Spring  
2020-2021

Summer 2021

*Project kick off*

*Develop problem statement and goals*

*Existing conditions and background research*

*Barriers to transit ridership*

*User research*

*Stakeholder engagement*

*Develop coordination and integration alternative strategies*

*Analyze and test coordination integration alternative strategies*

*Implementation strategies and final report with recommendations*

Need to adapt user research approach plan to current conditions; impacts key project sections

# Next Steps

**The Co-Project Managers will convene the Policymaker Forum and the Policy Advisory Council on Fare Coordination/Integration for further input in August.**

**Consultants will conduct existing conditions and background research while reviewing and revising their user research approach to adapt to post-pandemic circumstances.**

**The next meeting of the Fare Integration Task Force will be Monday, August 17, 2020.**

**Co-PMs will update the FITF on the project status and highlight key findings and recommendations from problem statement research and stakeholder engagement conducted.**



# Discussion Questions

- How should the project interact with the BRT/RTF?
- Does the problem statement effectively capture the myriad decision factors for riding transit?
- Does this problem statement incorporate the impacts of COVID-19?
- What other feedback would you like to provide?



# **Appendix: Project Summary**

# Fare Coordination/Integration Study

## Objectives

**Develop goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;**

**Identify barriers, especially barriers related to fares and the user experience, that are impeding increased ridership;**

**Identify opportunities to increase transit ridership by improving the regional fare system through regional fare coordination and integration strategies; and**

**Develop a detailed implementation plan, including funding plan, for recommended improvements.**

**Commission approved use of up to \$888,231 in RM 2 funds to support the study**



# Transit Operators and MTC Working Together

**Fare Integration Task Force – Project Ownership**

**Co-Project Managers – BART & MTC staff**

**Transit Operator Staff Working Group**

**Consultant Team**

## **Policymaker and Stakeholder Engagement**

**Policymaker Forum on Fare Coordination/Integration**

**MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration**

### **Fare Integration Task Force**



# Project Scope

**Transit operators and MTC staff jointly developed the project scope, comprised of seven (7) key tasks**



**Task 1: Problem Statement and Goals**



**Task 2: Existing Conditions and Background Research**



**Task 3: Barriers to Transit Ridership**



**Task 4: Alternative Solutions**



**Task 5: Alternatives Analysis**



**Task 6: Recommendations and Implementation Plan**



**Task 7: Stakeholder Engagement and User Research**

# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 20-0894      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 5/28/2020      **In control:** Fare Integration Task Force  
**On agenda:** 6/22/2020      **Final action:**  
**Title:** Fare Coordination/Integration Study and Business Case Project Timeline

Updated project timeline including details on future meetings of the Fare Integration Task Force, the Policymaker Forum on Fare Coordination/Integration, and the MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4b FCIS Timeline.pdf](#)

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

Fare Coordination/Integration Study and Business Case Project Timeline

Updated project timeline including details on future meetings of the Fare Integration Task Force, the Policymaker Forum on Fare Coordination/Integration, and the MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration.

**Presenter:**

William Bacon, MTC Co-Project Manager  
Michael Eiseman, BART Co-Project Manager

**Recommended Action:**

Information

**Attachments:**

# Fare Integration Task Force

June 22, 2020

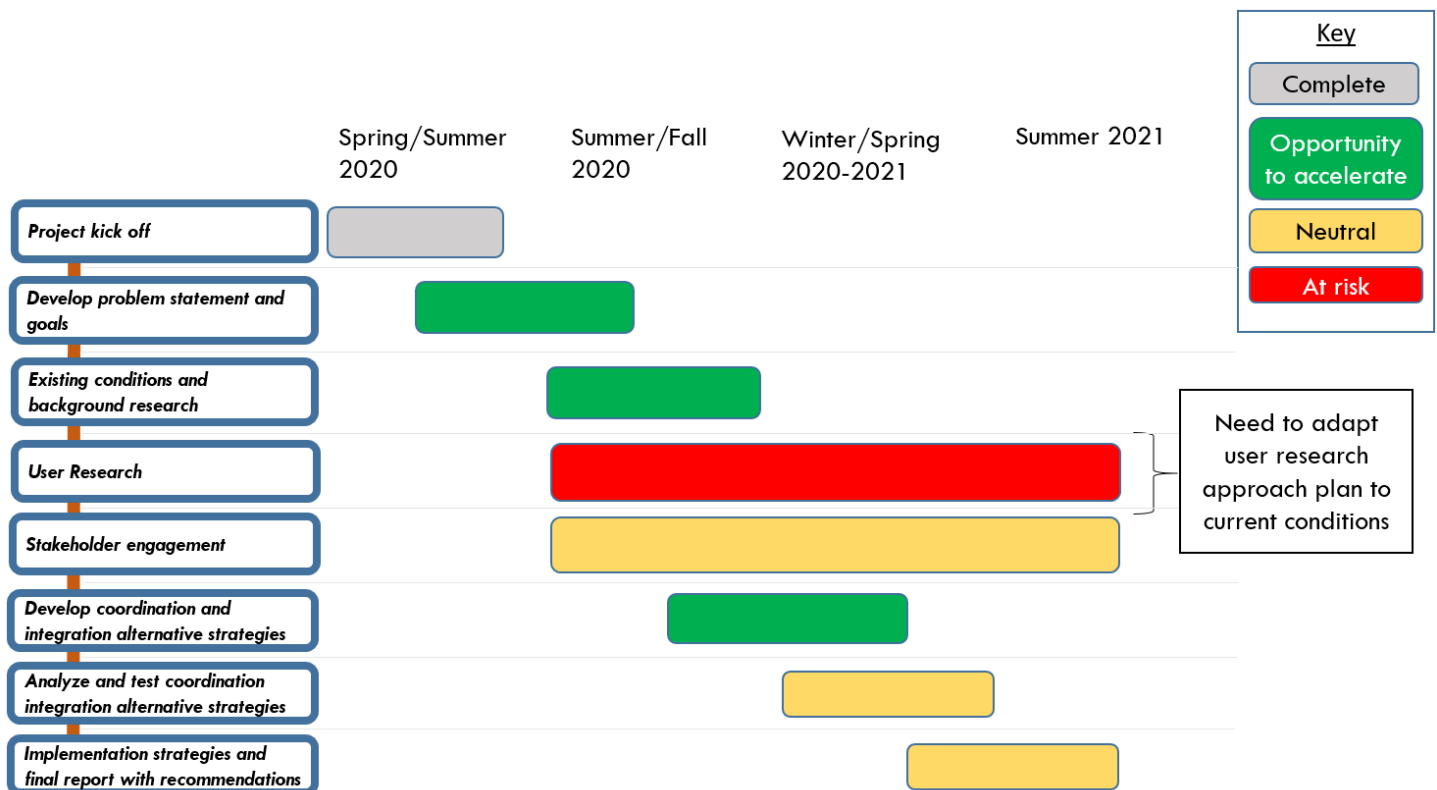
Agenda Item 4b

## Fare Coordination/Integration Study and Business Case Project Timeline

**Subject:** Updated project timeline including details on future meetings of the Fare Integration Task Force, the Policymaker Forum on Fare Coordination/Integration, and the MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration.

**Background:** The Fare Coordination/Integration Study and Business Case was originally proposed to have a duration of 12-18 months, starting in March 2020. Despite the delays caused by the COVID-19 pandemic the Co-Project Managers are still targeting for completion in the summer of 2021. This target timeline for the project is important given the value the Fare Coordination/Integration Study and Business Case may play in supporting the recovery of public transit from the COVID-19 pandemic.

Below is an updated Project Roadmap/Timeline:



The Fare Coordination/Integration Study and Business Case has several venues for executive, staff, policymaker, and stakeholder feedback. Details on proposed upcoming meetings for these various groups are described below.

**Fare Integration Task Force:** The Task Force has project oversight responsibilities for all aspects of the project and serves as the owner and sponsor of the work. The Co-Project Managers anticipate that the Task Force will meet on average every other month over the course of the project with the next meeting taking place on August 17, 2020.

**Staff Working Group:** Staff from each of the agencies represented on the Task Force collaborate with the Co-Project Managers through the Staff Working Group. The Staff Working Group provides guidance and support to the consultant team. The Staff Working Group will be meeting every 2-3 weeks for the duration of the project.


**Policymaker Forum on Fare Coordination/Integration:** This body is a convening of transit agency board members and MTC Commissioners at key points over the course of the project (total of 3-4 meetings, or approximately quarterly assuming 12-18 month timeline) to receive status updates, provide feedback, and discuss the project. The Policymaker Forum has not yet been convened. The Co-Project Managers are proposing to convene the Policymaker Forum for the first time in August 2020 to brief them on the project and seek their input as the project proceeds with its analysis.


**MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration:** This new subcommittee of MTC's Policy Advisory Council (a citizen's advisory body to MTC) will bring together Policy Advisory Council members and representatives from business, equity, education, and other stakeholder organizations. The subcommittee will meet approximately every other month. While the Co-Project Managers had expected to convene this Subcommittee for the first time in the spring of 2020 the COVID-19 pandemic and the Shelter in Place orders in the Bay Area made that impractical. Co-Project Managers now hope to convene this Subcommittee for the first time in August 2020. The Subcommittee will serve as the primary public stakeholder body for the project.

Each of the above bodies, with the exception of the Staff Working Group, will be convened through duly noticed public meetings.

**Issues:** None identified.

**Recommendation:** Information.

  
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Michael Eiseman, Director of Financial Planning, BART

  
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William Bacon, Policy and Financial Analyst, MTC