



# Metropolitan Transportation Commission

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

## Meeting Agenda

### Policy Advisory Council Equity & Access Subcommittee

*Veda Florez, Chair*

*Anne Olivia Eldred, Vice Chair*

#### *Members*

*Richard Burnett, Rick Coates, Christina Gotuaco,  
Richard Hedges, Michelle Hernandez, Michael Lopez,  
and Rahmon Momoh*

#### *Alternates*

*Randi Kinman and Terry Scott*

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Monday, January 11, 2021

2:00 PM

Yerba Buena - 1st Floor (REMOTE)

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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 Equity and Access Subcommittee members who will participate in the meeting from individual remote locations. A Zoom panelist link for meeting participants will be sent separately to Equity and Access Subcommittee 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. Equity and Access Subcommittee 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/85370538660>

Telephone (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

+1 301 715 8592 or +1 312 626 6799 or +1 646 876 9923

Webinar ID: 853 7053 8660

International numbers available: <https://bayareametro.zoom.us/j/kbepsWUs93>

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.

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

*Veda Florez, Equity & Access Subcommittee Chair*

## 2. Roll Call / Confirm Quorum

*Quorum: A quorum of this committee shall be a majority of its regular non-ex-officio voting members (6).*

3.     [21-0125](#)     Approval of the December 4, 2020 Meeting Minutes  
  
      Action:         Subcommittee Approval  
  
      Attachments:   [03 E&A Minutes Dec 4 2020.pdf](#)
  
4.     [21-0126](#)     Blue Ribbon Transit Recovery Task Force Update  
  
      Presenter:     Randi Kinman, Policy Advisory Council Chair
  
5.     [20-1641](#)     Coordinated Public Transit-Human Services Transportation Plan 2022 Update  
  
                      Coordinated Plan Update.  
  
      Action:         Information  
  
      Presenter:     Drennen Shelton  
  
      Attachments:   [05 Coordinated Plan 2022 Update.pdf](#)
  
6.     [21-0128](#)     MTC Equity Update: Equity Consultant Bench  
  
                      On-Call Equity Bench.  
  
      Action:         Information  
  
      Presenter:     Nalungo Conley  
  
      Attachments:   [06 On-Call Equity Bench update\\_EandA.pdf](#)

## **7. New Business**

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

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

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

*Equity and Access Subcommittee Members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial \*9.*

## **9. Adjournment / Next Meeting**

**The next meeting of the Policy Advisory Council Equity and Access Subcommittee will be held Friday, February 5, 2021, at 10:00 a.m. 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 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 #:** 21-0125      **Version:** 1      **Name:**

**Type:** Minutes      **Status:** Committee Approval

**File created:** 12/18/2020      **In control:** Policy Advisory Council Equity & Access Subcommittee

**On agenda:** 1/11/2021      **Final action:**

**Title:** Approval of the December 4, 2020 Meeting Minutes

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [03 E&A Minutes Dec 4 2020.pdf](#)

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

Approval of the December 4, 2020 Meeting Minutes

### Recommended Action:

Subcommittee Approval

### Attachments:



# Metropolitan Transportation Commission

## Meeting Minutes - Draft

### Agenda Item 3

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

## Policy Advisory Council Equity & Access Subcommittee

*Veda Florez, Chair*

*Anne Olivia Eldred, Vice Chair*

### *Members*

*Richard Burnett, Rick Coates, Christina Gotuaco,  
Richard Hedges, Michelle Hernandez, Michael Lopez,  
Rahmon Momoh, and Daisy Ozim*

### *Alternates*

*Randi Kinman and Terry Scott*

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Friday, December 4, 2020

10:05 AM

Yerba Buena - 1st Floor (REMOTE)

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### 1. Welcome

### 2. Quorum

**Present:** 10 - Council Member Burnett, Council Member Coates, Chair Florez, Council Member Hedges, Council Member Lopez, Council Member Momoh, Vice Chair Eldred, Council Member Gotuaco, (Alternate) Kinman and (Alternate) Scott

**Absent:** 2 - Council Member Ozim and Council Member Hernandez

Policy Advisory Council Members Adrian Mendoza and Walter Wilson were also in attendance.

### 3. [20-1639](#) Approval of the November 6, 2020 Meeting Minutes

**Action:** Subcommittee Approval

**Attachments:** [03 E&A Minutes\\_Nov 6 2020.pdf](#)

**Upon the motion by Vice Chair Eldred and second by Council Member Momoh, the November 6, 2020 Meeting Minutes were unanimously approved. The motion carried by the following vote:**

**Aye:** 8 - Council Member Coates, Chair Florez, Council Member Hedges, Council Member Momoh, Vice Chair Eldred, Council Member Gotuaco, (Alternate) Kinman and (Alternate) Scott

**Absent:** 4 - Council Member Burnett, Council Member Lopez, Council Member Ozim and Council Member Hernandez

4. [20-1722](#) Plan Bay Area 2050 Equity Analysis: Communities of Concern Update and Equity Analysis Report Framework

Discussion on next steps for the Equity Analysis for Plan Bay Area 2050.

**Action:** Information

**Presenter:** Anup Tapase

**Attachments:** [04 Plan Bay Area 2050 Equity Analysis Update Dec 2020.pdf](#)  
[04 Supplemental Handout.pdf](#)

Adrian Mendoza spoke on this item.

Walter Wilson spoke on this item.

The following information was shared during this item:

From Randi Kinman: I'm not talking about the RHNA numbers and rural counties or portions of counties. I'm talking about our connected goals (i.e. getting to work on foot in 20 minutes, via transit 40 minutes, etc.) in the urban areas vs the urban or agricultural areas. How do we disaggregate the data?

## 5. New Business

## 6. Public Comments / Other Business

## 7. Adjournment / Next Meeting

The next meeting of the Policy Advisory Council Equity and Access Subcommittee will be held at a time and place to be duly noticed.



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 21-0126      **Version:** 1      **Name:**

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

**File created:** 12/18/2020      **In control:** Policy Advisory Council Equity & Access Subcommittee

**On agenda:** 1/11/2021      **Final action:**

**Title:** Blue Ribbon Transit Recovery Task Force Update

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:**

Date	Ver.	Action By	Action	Result
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**Subject:**  
Blue Ribbon Transit Recovery Task Force Update

**Presenter:**  
Randi Kinman, Policy Advisory Council Chair





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 20-1641      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 10/29/2020      **In control:** Policy Advisory Council Equity & Access Subcommittee  
**On agenda:** 1/11/2021      **Final action:**  
**Title:** Coordinated Public Transit-Human Services Transportation Plan 2022 Update  
Coordinated Plan Update.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [05\\_Coordinated Plan 2022 Update.pdf](#)

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

Coordinated Public Transit-Human Services Transportation Plan 2022 Update

Coordinated Plan Update.

**Presenter:**

Drennen Shelton

**Recommended Action:**

Information

**Attachments:**

**Metropolitan Transportation Commission  
Policy Advisory Council Equity & Access Subcommittee**

January 11, 2021

Agenda Item 5

**Coordinated Public Transit-Human Services Transportation Plan 2022 Update**

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**Subject:** Coordinated Plan Update.

**Background:** MTC staff are about to kick off the update of the region's Coordinated Public Transit-Human Services Transportation Plan ("Coordinated Plan"). The current Coordinated Plan, last updated in 2018, is available online: [https://mtc.ca.gov/sites/default/files/MTC\\_Coordinated\\_Plan.pdf](https://mtc.ca.gov/sites/default/files/MTC_Coordinated_Plan.pdf). The recommended regional priorities and coordination strategies from this plan are summarized in Attachment A.

The Coordinated Plan is a federal requirement under the Fixing America's Surface Transportation Act (FAST Act) to establish the region's funding priorities and coordination strategies to meet the transportation needs of older adults, people with disabilities and low-income populations. The update of the Bay Area's Coordinated Plan will continue to focus on the needs of a broad range of transportation-disadvantaged populations in order to maximize opportunities to improve service and coordination.

MTC staff will engage the help of a consultant to complete this work and will convene a Technical Advisory Committee that will provide oversight on the Coordinated Plan update. This committee will include transportation professionals representing public transit agencies, county transportation agencies, non-profit human services transportation providers, county aging services agencies, and mobility managers. The Coordinated Plan update will provide a new demographic profile of transportation disadvantaged groups, highlight best practices, and make recommendations for improved services and coordination. COVID-19 pandemic response and recovery, equity and transportation justice, and emergency transportation planning are among new topics that will be explored through this plan update.

Below is a schedule of activities for the 2022 Coordinated Plan Update:

<b>Coordinated Plan Update Activity</b>	<b>Timeframe</b>
Outreach to reconfirm gaps and solutions	January – June 2021
Research on best practices and documentation of new concerns	January – June 2021
Demographics updates	June – September 2021
Documentation of transportation resources	September – December 2021
Update of strategies and recommendations	December – February 2022
Outreach to confirm findings	March – April 2022
Draft plan review	June – September 2022
Commission adoption	October 2022

You may contact Drennen Shelton ([dshelton@bayareametro.gov](mailto:dshelton@bayareametro.gov) or 415-778-5309) with any questions about the Coordinated Plan.

**Issues:** None identified.

**Recommendation:** Information

**Attachments:** Attachment A: 2018 Coordinated Plan Recommended Regional Priorities and Coordination Strategies

## 5. REGIONAL STRATEGIES FOR COORDINATION

Transportation gaps and solutions identified in this Coordinated Plan become eligible for funding through federal funds distributed by MTC to regional partners, as well as other funds from state and county agencies. These eligible solutions are referred to as projects, and are outlined in Appendix E – Projects Eligible for Funding. Projects are concrete solutions—new vehicles, improved sidewalk infrastructure or accessible bus stops, and software systems are some examples.

**Strategies**—covered in this chapter—are bigger picture initiatives that stakeholders and MTC can implement or facilitate. These strategies grow directly from feedback received from user groups, their advocates, and existing local providers of transportation and human services. They are bounded by regional policies, and the powers that MTC and transit agencies, cities, counties, congestion management agencies, non-profits, providers, and other stakeholders have to fund and implement initiatives.



# STRATEGY 1: COUNTY-BASED MOBILITY MANAGEMENT

In 2016, MTC staff prepared the Roadmap Study: A Bay Area Mobility Management Implementation Plan, the purpose of which was to assess ongoing mobility management efforts in each county, and lay the groundwork for successful implementation of mobility management region wide. The study found that implementing a county-based mobility management strategy requires a multipronged approach. MTC would lead the development of a county-based mobility management program and continue to help leaders on a local level to coordinate mobility services for an entire spectrum of transportation providers. The approach and recommendations are detailed in this section.

## Development of a County-Based Mobility Management Program

The promise of mobility management is two-fold: to improve the mobility of traditionally underserved groups by directing passengers to available transportation options, and to increase the efficiency of the overall system of public transit and human service transportation through coordination. Mobility management is of the utmost importance due to its ability to leverage and enhance the effectiveness and efficiency of other projects and strategies listed in this Coordinated Plan. Based on best practices, MTC expects county-based mobility management programs would include three key components:

1. **Countywide travel training,**
2. **In-person ADA paratransit certifications, and**
3. **Coordination of information and referrals (I&R) through the provision of a mobility manager in every Bay Area county.**

MTC's primary roles in facilitating such a program would include:

- Supporting funding for locally led, county-based mobility management programs, and associated program components in each county, including county one-call/one-click systems for trip planning; coordinated travel training programs for those currently not using the fixed-route system; and enhanced ADA paratransit certification processes for each transit provider.
- Serving as the central point of contact for county mobility managers, providing resources and technical support.

- Leveraging the 511 system or other available traveler information system for its role in providing travel information.
- Encouraging the creation of Consolidated Transportation Service Agencies (CTSAs) in each county. CTSAs are a mechanism for promoting mobility management. Through an MTC designation process, County Board of Supervisors, Paratransit Coordinating Councils, County Congestion Management Agencies, and transit operators confirm their support of an official mobility manager for the county. (Appendix D lays out the process for designating CTSAs in the San Francisco Bay Area.)

In addition, MTC should work with county led mobility management efforts to ensure that each county has created and maintains an online inventory of accessible vehicles in each county (e.g. all 5310-funded vehicles plus other public transit and human service transportation vehicles). This list should be shared with County-level offices of emergency services and would improve the ability of agencies to coordinate and/or enter into public-private partnerships to provide wheelchair-accessible trips.

This would increase the effectiveness of investments in the accessible fleet. MTC should also ensure that each county mobility manager provides assistance to 5310 applicants to help with applications and federal compliance, and that within each county there is a mechanism by which applicants can “piggyback” onto statewide commodity contracts (vehicles, software, capital investments) to increase cost efficiency of vehicle investments.

MTC should work with county-based mobility management efforts to make sure that each county mobility manager facilitates joint driver training and follow-up customer satisfaction surveys to monitor success, and provide assistance in the development and funding of new transportation services.

### Best Practice Example:

**Ride Connection (Portland, Oregon):**<sup>37</sup> Ride Connection is a private non-profit that coordinates the transportation operations of 30+ small community-based providers of elderly and disabled transportation services. The services it provides are summarized in **Figure 5.1**.

Ride Connection provides information for all transportation options available to older adults and people with disabilities in the region, and

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37 Nelson\Nygaard. Coordinated Transportation Plan for Elderly and People With Disabilities. TriMet. 2012. [trimet.org/pdfs/publications/elderly-and-disabled-plan.pdf](http://trimet.org/pdfs/publications/elderly-and-disabled-plan.pdf)

**Figure 5.1** Ride Connection Support Services Provided to Service Partners

Support Services			
<ul style="list-style-type: none"> <li>• Service coordination between partners</li> <li>• Customer service monitoring</li> <li>• Grant writing, fundraising, and serving as conduit for state and federal fund</li> <li>• Service planning, which includes coordination of existing services for efficiency and creation and implementation of innovative ideas to meet local and regional transportation needs in the community</li> </ul>	<ul style="list-style-type: none"> <li>• Individual travel ability assessment</li> <li>• Web –based tools for daily operations and reporting</li> <li>• Contract administration, compliance and performance monitoring</li> <li>• Advocacy for individuals with transportation needs and for community-based service partners who meet those needs</li> </ul>	<ul style="list-style-type: none"> <li>• Driver, partner and staff training and development</li> <li>• Data management and reporting support</li> <li>• Outreach and joint marketing of regional transportation services</li> <li>• Technical assistance and support to service partners and community organization</li> </ul>	<ul style="list-style-type: none"> <li>• Accessible fleet acquisition</li> <li>• Volunteer recruitment assistance</li> <li>• Management and maintenance of a 100+ fleet</li> <li>• Service scheduling and centralized call center services for a growing number of partners</li> </ul>

**SOURCE:** TriMetCoordinated Transportation Plan for Elderly and People with Disabilities 2012

refers people to the options that best fit their circumstances. With one call to Ride Connection, a rider can either access Ride Connection services or be connected to another service provider in the region who can best serve her/him.

## Facilitate Coordination

Coordination is essential for meeting the needs of seniors, people with disabilities, veterans, and those with low incomes. To best serve the region’s needs for mobility services, partnerships need to involve the entire spectrum of transportation providers: providers of public fixed route transit, paratransit, human service transportation providers, private taxi and ride-hailing services, departments of health and human services, advocacy groups, faith-based groups, medical and dialysis providers and providers of support services to low-income populations, seniors and individuals with disabilities.

As a funder and evaluator of grant applications, MTC has been and should continue to award extra points to projects and proposals that address cross-county or regional connections by including coordination as an evaluation criterion in appropriate fund programs. MTC will continue to provide a venue for inter-agency coordination.

### Best Practice Example:

**King County Access (King County Metro)**<sup>38, 39</sup>: King County Access provides paratransit service in King

County, Washington. A paratransit rider making an “Out of County Transfer trip” only needs to make a reservation with King County Access. Access will coordinate the trip scheduling with the connecting agency. King County Access recommends that riders call as early in the day as possible to give the two agencies time to coordinate the Out of County Transfer trip before the end of the day.

Access has designated transfer points for Out of County Transfer trips at transit stations or park-and-rides near the boundaries of neighboring counties. On the day of an Out of County Transfer trip, Access will pick up the rider at her/his origin, and drive her/him to the transfer point. Drivers and dispatch staff at both agencies coordinate with each other to communicate times of arrival. If the driver from the paratransit agency in the neighboring county has not arrived at a transfer point when the Access driver arrives, the Access driver will wait with the passenger until the connecting driver gets there.

This transfer method of two paratransit drivers meeting to transfer the rider from one vehicle to another – without leaving a rider at a transfer point unattended – is also known as a “hand-off.” While there is an example of a Bay Area provider that has also adopted the “hand-off” model (East Bay Paratransit), most of the larger systems have yet to implement this practice.

<sup>38</sup> King County Metro. Access Ride Guide. 2015. metro.kingcounty.gov/tops/accessible/pdf/AccessRideGuide.pdf

<sup>39</sup> King County Access Call Staff. Phone Interview by Nelson\Nygaard. February 17, 2017.

## Recommendations for MTC

### Plan and Implement Mobility Management Technical Assistance Program

As regional partners begin to develop local mobility management functions, MTC staff should develop a technical assistance program to advise partners on the implementation of travel training, in-person eligibility, and information and referral programs.

### Set Schedule for Coordination Summits and Assess Opportunities to Incentivize Coordination

Coordination takes preparation. MTC should keep the momentum from the Coordinated Plan and Roadmap Study efforts by establishing a schedule of regional coordination summits and topics for the convening.

MTC can host regular events with transit operators, human service agencies, CMAs, and other coordination partners. MTC can also begin to assess specific opportunities, suggested in this chapter of this plan, to incentivize coordination among transit operators and human services providers.

### Identify Sustainable Sources of Flexible Funding for County-Based Mobility Management

Within one to two years of Coordinated Plan adoption, MTC should work with county and local stakeholders to identify funding for county-based mobility management programs.

## Recommendations for Partners

### Develop New County-Based Mobility Management and Related Initiatives

In the first one to two years of this plan's adoption, regional partners should begin to develop new mobility management functions across the Bay Area. In the first two years of this plan's implementation, county partners are expected to consider how to fund county-based mobility management functions, such as travel training, information and referral services, and ADA paratransit in-person eligibility and conditional eligibility policies.

### Contribute to Regular Coordination Summits

To leverage coordination opportunities, CMAs, transit operators, human service providers, and other partners should commit to contributing and participating in regular coordination summits.

### Create Consolidated Transportation Service Agencies and Seek Funding for County-Based Mobility Manager Positions

Local entities can request to become designated as a Consolidated Transportation Service Agency (CTSA) from MTC. The CTSA designation empowers each county to build out a full mobility management program that facilitates coordination between local social service agencies and transportation providers. In the next one to two years, counties that lack a CTSA should seek designation, or develop a plan to build CTSA capacity in their county. (Appendix D lays out the process for designating CSA in the San Francisco Bay Area.)

## STRATEGY 2: IMPROVE PARATRANSIT

Paratransit services should be improved to better meet the needs of customers. The recommended approach is to improve access to healthcare, reduce the cost of service, and make it easier to pay for ADA paratransit services.

### Address Access to Healthcare

The ongoing consolidation of healthcare centers and tendency to locate in peripheral locations has reduced transit accessibility to medical services. Although ADA paratransit and non-profit providers have been required to increase the volume and length of trips for medical purposes, there is currently no unified funding mechanism in place in the Bay Area for providers to recover the costs of these trips from Medi-Cal. However, "non-emergency transportation" is one of the reimbursable activities under the Medi-Cal program.

Non-emergency transportation vehicles include taxis, buses, trains, cars, and vans. Time spent and actual expenses, such as taxi vouchers and bus passes, can be claimed through County-Based Medi-Cal Administrative Activities (CMAAs). However, there is a requirement to use the lowest cost option, which often results in reimbursement being limited to transit fares.

Attempts to address this issue have been ongoing for a number of years in California. MTC can play a role by exploring a cost recovery program for Medi-Cal non-emergency transportation in the Bay Area for public and private transportation providers who are coordinating with county-based mobility management efforts. As part of the development of this program, the types of entities that would be eligible for participation should be determined, in addition to an overall implementation plan.



Given the lack of reimbursement programs, MTC could also explore other ways to help agencies contain costs. For instance, costs are particularly burdensome for ADA paratransit providers who provide subscription trips to individuals requiring dialysis. ADA paratransit providers receive no financial contribution from the clinics whose clients receive these services. MTC could bring the parties together to arrive at cost sharing arrangements that would exceed the fare paid by riders, or explore other ways to reduce travel costs, and expand travel options.

Finally, MTC could play a role in addressing service gaps to medical services by linking NEMTs and TNCs to increase capacity and provide accessible service to medical destinations. This could be achieved through MTC grants for pilot programs and/or technical assistance.

## Reduce the Cost of Providing ADA Paratransit

Due to the growing population of ADA-eligible passengers, the increasing difficulty of hiring and retaining paratransit drivers, and other national trends indicating increased labor costs, the costs of providing ADA paratransit are rising.<sup>40</sup> Strategies to address these costs are:

- Increasing the use of in-person eligibility assessments and conditional eligibility policies. Transit agencies should implement in-person assessments, as well as evaluations of applicants' functional mobility by trained professionals to provide conditional eligibility.
- Piloting trip-screening modules in scheduling software to facilitate the implementation of conditional eligibility policies. Funding for this technology can be prioritized, and can assist in coordinating the phased development of a regional database of accessible bus stops to inform trip-screening.
- Promoting the use of Interactive Voice Response (IVR) systems to remind passengers of upcoming trips and communicate imminent arrival. IVR systems will help reduce no-shows and late cancels.

### Best Practice Examples:

Most large paratransit systems in the U.S. now use in-person eligibility assessments, including functional assessments, in order to achieve more accurate eligibility determinations. One of the key

benefits of this eligibility model is the ability to determine the conditions under which an applicant can ride fixed route service, even if for some of their trips.

Conditional eligibility is routinely applied in Seattle, Pittsburgh, Philadelphia, Tacoma, and Salt Lake City, and the trend is towards greater implementation. Systems that have been successful in implementing conditional eligibility generally have between 12 and 14 conditional categories, although King County Metro has over 20. Following is a listing of some of the key categories that are used by transit agencies in applying conditional eligibility:

- Street barriers (e.g. lack of sidewalks or curb cuts)
- Distance
- Slope
- Seasonal
- Snow/ice
- Temperatures
- Darkness
- Need for transfers on fixed-route
- Travel trained
- Dialysis

Transit agencies use a variety of approaches to apply eligibility conditions. King County Metro identifies conditionally eligible riders who request the same trip with some frequency. They then conduct a "pathway review" to determine if the individual would actually be able to negotiate the paths between the nearest transit stops and their points of origin and destination. If this is an option, they inform the customer of their fixed route options and do not provide the trip on paratransit. Accessible Services staff have estimated annual savings of approximately \$845,000 in Access operating costs because of this approach.

In Pittsburgh, ACCESS applicants are given very specific information about their eligibility to ensure that both reservationists and the riders have a common understanding of which trips are eligible. Since 2005, ACCESS has been applying eligibility conditions on all trips requested by those with conditional eligibility.

ACCESS has found that about 29-35 percent of applicants are determined conditionally eligible, but they only take about 18 percent of the trips, and about half of those are subscription trips. This proportion of trips has not changed in nearly ten years. Therefore, the screening process, while not insignificant, is not as substantial as is commonly assumed.

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<sup>40</sup> Federal Transit Administration, Transit Cooperative Research Program, Report 142, "Vehicle Operator Recruitment, Retention, and Performance", 2010, Washington DC, Summary, page 1



ACCESS generates regular reports about conditional and feeder trips so they can evaluate the barriers that create eligibility. If these barriers can be addressed, the agency tries to implement mitigations, such as making bus stops accessible, installing traffic signalization and curb cuts.

The agency has had only limited success in this effort – but knowing why people need to use paratransit is helpful in planning efforts.

Make it Easier to Pay for Paratransit

The cost of on-vehicle card readers necessary for the use of Clipper cards is prohibitive given the relative lower volume of trips provided on paratransit as compared to fixed-route. MTC and operators can examine other technological solutions that do not increase the costs of providing ADA paratransit.

Clipper 2.0 may be able to include paratransit as a parameter in the new system. Other solutions may be available using current technology (RTC Clipper Cards), such as a system in which payment for the trip is secured upon booking, and processed upon taking the trip.

Best Practice Example:

**Access Services (Los Angeles County):**<sup>41</sup>  
Access Services provides paratransit services on behalf of Los Angeles County’s 44 fixed route transit providers. It is the county’s Consolidated Transportation Services Agency (CTSA). Access offers multiple options for riders to pay for

41 Access Services. How to Pay for Your Ride. [accessla.org/riding\\_access/access\\_riders\\_guide/pay\\_your\\_ride.html#](https://accessla.org/riding_access/access_riders_guide/pay_your_ride.html#)

paratransit trips both before and at boarding (Figure 5.2).

Having several options for paying both in advance and at boarding allows riders the flexibility to reduce their boarding time with pre-payment options, or pay when they board if there was less planning in advance of the trip. Riders can pre-load funds for paratransit rides onto their Access Rider ID/ TAP card. At boarding time, the driver can then swipe their card, and the fare will be deducted automatically from the rider’s Access Rider ID/TAP card account balance.

Riders can also pre-pay for upcoming trips by purchasing ride coupons in-person at a local transit agency, by mail, or online at Access’s website. If a rider does not have a form of prepayment for a paratransit trip, she/he can pay the driver with a credit/debit card, or cash in exact change. The pre-paid Access Rider ID/TAP card and coupons save time during boarding, because they forego the time spent providing exact change cash to a driver.

Recommendations for MTC

Begin Policy Discussion around Medi-Cal Cost Recovery Program for the Bay Area

To address the growing costs of transportation to healthcare in the Bay Area, in the next 6 to 12 months, MTC can begin internal policy discussions regarding how to leverage available reimbursements for non-emergency medical trips. The first step is to identify the types of entities that would be eligible to participate in the program and those who would likely participate in such a program.

Figure 5.2 Access Services Paratransit Payment Methods

Support Services	Payment Method
At Boarding	Cash
	Credit/Debit Card
In Advance	Purchase Coupons In-Person (Pomona Valley Transit Authority, City of Santa Fe Springs, City of Azusa Bus Pass Window)
	Order Coupons by Mail
	Order Coupons Online
	Pre-Load Access Rider ID/TAP card

SOURCE: Access Services

### **Convene Task Force to Assist Implementation of In-Person Eligibility**

MTC can use its position as a regional resource to convene a task force to assist in the implementation of in-person eligibility and functional testing procedures at each of the region's transit operators that do not currently use this eligibility model. This effort can increase the effectiveness of new funding made available to regional operators for the implementation of county-based mobility management.

### **Recommendations for Partners**

#### **Take Opportunities to Expand Subsidized Same-Day Trip Programs**

Paratransit users and operators alike see benefits in expanding options for same-day trips. Same-day trip programs provide greater mobility options and flexibility to riders, and operators may realize cost savings through innovative partnerships. Some public transit agencies across the Bay Area already have programs, typically in partnership with local taxi companies, and some are exploring relationships with ride-hailing companies. In counties where local sales taxes have afforded the opportunity to provide additional supplemental service for seniors and people with disabilities, municipal programs also exist. However, many individuals who would benefit from such programs, including veterans and those with low incomes, lack access. In the next one to two years, operators and providers should explore opportunities to implement these programs.

#### **Implement Medi-Cal Cost Recovery Program**

To address the growing costs of transportation to healthcare in the Bay Area, paratransit providers can implement Medi-Cal cost recovery programs. Recovered costs could be put back into the paratransit system, or used to fund less expensive non-ADA services.

## **STRATEGY 3: PROVIDE MOBILITY SOLUTIONS TO SUBURBAN AREAS**

The suburbanization of poverty has resulted in challenges providing fixed-route services in low-density development areas. MTC can help the region address some of these challenges by implementing recommendations for an expansion of suburban mobility options.

### **Increase Suburban Mobility Options**

New and expanded transportation solutions are

needed for addressing mobility challenges that result from the suburbanization of poverty and older adults. Suburban development patterns are characterized by medium- and low-density land uses, which are often incompatible with traditional fixed-route transit service. Flexible, demand-responsive solutions are necessary to provide mobility in these areas.

Technical assistance for Bay Area agencies and organizations interested in developing public-private partnerships for new suburban mobility options is needed. MTC can provide guidance on requirements and best practices for ensuring equitable access to all mobility options. MTC and Bay Area operators can establish minimum data sharing requirements and minimum service characteristics. Technical assistance and region wide policies can help transit agencies and human service transportation providers expand non-ADA subsidized same-day trip programs through partnerships with taxi or ride-hailing companies. Subsidized carshare programs and low-income vehicle loan programs are essential to ensuring that low-income people have access to vehicles when trip patterns render transit not an option.

#### **Best Practice Examples:**

##### **KEYS Auto Loan Program (Contra Costa County):**

The Keeping Employment Equals Your Success (KEYS) Auto Loan Program at Contra Costa County's Employment and Human Services Department (EHSD) offers a low-interest auto loan for CalWORKs participants who are unable to qualify for an auto loan on their own. In order to qualify for an auto loan in the KEYS program, a CalWORKs participant must meet the following eligibility requirements:

- Valid driver's license
- No more than one point on driving record
- Employed full-time with the same employer for at least three months

An eligible CalWORKs participant may be eligible for a loan up to \$5000. The loan recipient must pay back their KEYS loan within a two-year period over monthly payments. Additionally, she or he must attend basic automobile maintenance and budget management classes.

**DriveForward (Peninsula Family Service):** Peninsula Family Service's DriveForward program offers auto loans to help individuals who cannot qualify for an auto loan on their own acquire a car, and mend their credit. To qualify for participation in the DriveForward program, a person must meet the following eligibility requirements:

- Valid California driver's license
- Annual household income of \$75,000 or less (for a family of three)
- Live or work in San Mateo or Santa Clara counties
- Demonstrate ability to afford loan payments
- Attend a financial workshop
- Meet one-on-one with a member of the Peninsula Family Service Financial Empowerment Team

If a person meets the requirements and is approved by the Peninsula Family Service Loan Committee, she or he must select a vehicle that passes third-party certified mechanic inspection before purchasing. DriveForward requires the inspection before issuing a loan in an effort to ensure that a vehicle is safe for the participant.

**LAVTA GoDublin Pilot:** In 2017, the Livermore-Amador Valley Transportation Authority launched GoDublin, a year-long pilot partnership between the agency, two ride-hailing companies, and a local taxi company. In the pilot, participants can use a unique code either through the ride-hailing apps or with the taxi company to receive a discount on rides that start and end within the jurisdictional boundaries of Dublin, CA. The pilot grew out of the agency's 2016 Comprehensive Operational Analysis, which revealed low productivity on two routes and spurred the agency to consider supplemental service as a way to maintain coverage more cost-effectively.

Like other transit/ride-hailing partnerships, this pilot is still in its early days and no formal evaluation of impacts has been conducted. The agency plans to conduct and release such an evaluation by mid 2018. As such, this, and other transit/ride-hailing partnerships, are not best practice examples per se, but rather demonstrate a recent trend for agencies trying to address suburban mobility challenges in a more cost effective manner.

## Recommendations for MTC

### Define the Channels to Provide Shared Mobility Technical Assistance

Human service providers, transit agencies, and municipalities serving seniors, people with disabilities, veterans, and low-income groups in the Bay Area want to leverage new mobility service providers — such as carshare, ride-hailing, and bikesharing — to serve their constituents and reduce costs.

MTC can help ensure that partnerships have the best interests of all, and can start by defining appropriate channels to provide technical assistance.

Key areas include:

- Providing regular venues for agencies who have piloted flexible transit in low-density areas (e.g. VTA and AC Transit) to communicate lessons learned and best practices to other transit agencies.
- Creating a region wide policy statement on the goals of public/private shared mobility partnerships and the values they should uphold in coordination and alignment with similar ongoing efforts within the agency.
- Establishing recommended policies for minimum data sharing requirements and service characteristics for public-private partnerships in coordination and alignment with similar ongoing efforts within the agency.

## Recommendations for Partners

### Fund Low-Income Vehicle Programs

County transportation and transit agencies should prioritize and fund low-income carshare subsidy programs to increase access to vehicles for occasional trip needs, such as shopping or medical appointments. Implementation partners may be cities with on-street carshare programs, senior centers or large developments that provide access to carshare vehicles on-site, or non-profits who can coordinate across several carsharing programs.

MTC and County transportation and transit agencies should prioritize and fund low-income vehicle loan programs for individuals whose typical trip patterns render transit not an option. This program would include funds for vehicle purchase, insurance, and maintenance, and could be implemented in coordination with county-level partners.

### Prioritize One-Click Systems

County transportation and transit agencies should prioritize the development and funding of one-click systems that increase the awareness of existing suburban mobility options, and potentially make it easier to pay for trips. CMAs and mobility managers should ensure the integration of all locally available public and private mobility options to increase the availability of non-driving options.

## STRATEGY 4: MEANS-BASED FARES\*

### Regional Means-Based Transit Fare Programs

Based on comprehensive input from stakeholders in the needs assessment of this plan, as well as other

Bay Area needs assessments and studies, transit affordability has been and continues to be a key issue for some segments of the population.

MTC has been leading a study to develop scenarios and evaluate the feasibility of implementing a regional means-based transit fare program in the nine-county Bay Area to make transit more affordable for low-income residents. The findings and recommendations of this study are expected to be available in early 2018. Recommendations for MTC and agency partners are outlined below.

## Recommendations for MTC and Partners

### Build Consensus for Implementation of Means-Based Fares

Pending the conclusion of the Means-Based Fare Study, MTC should continue working with transit operators to develop an implementable program and seek funding to support this effort.

## STRATEGY 5: SHARED AND FUTURE MOBILITY OPPORTUNITIES\*

### Advocate for the Accessibility of Emerging Shared Mobility Solutions and Autonomous Vehicles

Shared mobility solutions, such as bikeshare, carshare, ride-hailing, and microtransit are options available to the public today. Most shared mobility providers are private entities, and as such may or may not prioritize service to traditionally underserved groups. MTC, CMAs, cities and counties can play an important role in ensuring access to these systems and their future driverless products, which, when taken together with public transit, promise a more seamless and convenient mobility ecosystem. Innovation must be balanced with equity and accessibility concerns. Relying exclusively on the use of smart phones, credit/debit cards, English language only, and non-accessible vehicles limits who can use emerging mobility services. MTC, CMAs, cities and counties should:

- Leverage shared and future mobility programs to liaise with the technology and automotive industries and advocate for the physical, temporal, financial, and geographic accessibility of these systems for users of all abilities
- Develop a statement of guidance to formalize agency position on these topics

- Create and fund accessible bikeshare pilots with local partners
- Create and fund subsidized shared mobility programs, such as was recently implemented by MTC with Bay Area Bike Share (now Ford GoBike), to increase access to low-income populations by incentivizing private providers to locate in traditionally underserved areas at discounted rates
- Fund cities' and non-profits' purchase of wheelchair-accessible vehicles to contribute to a "flexible fleet," made available to taxi companies, ride-hailing services, or carsharing programs

### Best Practice Examples:

**San Francisco:** In 2017, the San Francisco County Transportation Authority and San Francisco Municipal Transportation Agency adopted Guiding Principle for Management of Emerging Mobility Services and Technologies.<sup>42</sup> That document serves as a framework for the implementation of policies and programs. Further, the principles will guide decision-makers in evaluating existing services, identifying best practices and strategies, and highlighting goals when the City collaborates with transportation providers. The ten guiding principles<sup>43</sup> are:

1. Maintain roadway safety through SF Vision Zero
2. Encourage mass transit through SF Transit First
3. Ensure equitable access for people of all backgrounds or means
4. Increase mobility opportunities for people of all abilities
5. Improve environmental sustainability and reduce greenhouse gas emissions through SF Climate Action Strategy
6. Reduce roadway congestion
7. Improve accountability through data driven decision making
8. Ensure fairness in labor practices
9. Promote positive financial impacts and a state of good repair
10. Collaborate openly with public agencies, the community and innovative companies to improve our city together

**Los Angeles:** In August 2016, the City of Los Angeles' Transportation Technology Strategist published "Urban Mobility in a Digital Age," a plan

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42 Guiding Principle for Management of Emerging Mobility Services and Technologies. San Francisco, CA: City of San Francisco, 2017.

43 SFCTA. <http://www.sfcta.org/emerging-mobility/FAQ#gui>

\*Pending Commission Direction

to focus the City's regulatory and service provision responsibilities in an evolving ecosystem of mobility choices. Later that year, the Shared Use Mobility Center, TransitCenter, and the William and Flora Hewlett Foundation collaborated with Los Angeles County to create the "Shared Mobility Action Plan for Los Angeles County."

Each of these guiding documents highlights accessibility — both physical and economic accessibility — as necessary goals for shared mobility and autonomous vehicles within their jurisdictions. Further, both recognize the important role of local government in ensuring accessibility as a means to achieve community values.

*"Without a proactive role by local government, connected and automated vehicles may not fulfill the promise of making our roadways safer, more efficient, and more accessible."*<sup>44</sup>

"As California considers strategies to put TNCs and taxis on an 'even playing field' through statewide regulation, several of the taxi industry's legacy consumer and safety provisions — such as mandates to provide wheelchair-accessible vehicles and serve low-income neighborhoods — hang in the balance."

The Shared Mobility Action Plan makes a specific policy recommendation to apply public transit's focus on equity and accessibility to shared mobility. The plan encourages the County to work closely with Access Services — the county's ADA Paratransit provider and Consolidated Transportation Services Agency (CTSA) — to "identify and test how shared mobility can meet ADA requirements and improve the rider experience." In March 2017, a Shared Mobility Action Plan Implementers Council — comprised of stakeholders from transit agencies, cities, advocates, and mobility service providers — was formed to coordinate implementation efforts.

## STRATEGY 6: IMPROVE MOBILITY FOR VETERANS

### Veterans'-Specific Mobility Services

Some of veterans' mobility needs will be addressed by other strategies recommended in this plan — such as creating a more seamless transit experience or means-based fare programs. However, additional mobility services could address the affordability and access needs unique to veterans in the Bay Area, such as implementing new services for medical long-distance trips.

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<sup>44</sup> Urban Mobility in a Digital Age. Los Angeles, CA: City of Los Angeles, 2016

### Serve Long-Distance Medical Trips for Veterans and Local Veterans' Shuttles

MTC can also support the development of new services designed specifically for veterans. While some of the Bay Area's veteran population is concentrated close to VA Hospitals and other veteran-specific health clinics, many parts of the region are more rural in nature, and veterans must travel long distances to reach the care they need. Other regions have set up frequent long-distance coach bus services to connect veterans with these health centers. In other locations, transit agencies have designed fixed-route shuttles around the specific needs of veterans (based on their home locations and health clinics or community centers). Volunteer driver programs have had difficulty serving these types of trips due to constraints in recruiting veteran drivers.

#### Best Practice Example:

- **Lufkin-Houston Veterans Bus:** Former U.S. Congressman Charlie Wilson was instrumental in obtaining private funding for the launch of a coach bus service between Lufkin and Houston — where the VA has a large medical center. The vehicle was funded by a local foundation that coordinated volunteers to distribute coffee and donuts to passengers each morning. The program, administered by the Brazos Transit District and operated by Coach America, transports 35 to 40 veterans every day. Since the launch of the service, additional "last-mile" shuttles have been initiated to connect people to Lufkin from smaller communities up to 40 miles away. Angelina County determined that a volunteer driver program was infeasible for this need given the distance and scale of demand.
- **Monterey-Salinas Transit (MST) Veterans Shuttle:** In May 2017, MST launched a new fixed-route service designed to meet the local mobility needs of veterans. A new VA clinic will open in August, and the route serves that destination as well as an integrated health facility and an area with veteran residential density.

### Create a Forum for Veterans to Advise MTC on Mobility Needs

This plan recognizes that there are further opportunities to address veterans' mobility needs in the Bay Area. In some cases, the needs are regional in nature; in others, there are specific local gaps. However, more dialogue is needed to refine strategies to meet Bay Area veterans' needs. MTC can coordinate forums for this dialogue to take place.



## RECOMMENDATIONS TIMELINE

This section outlines the recommended timeline for the immediate and longer-term steps required for MTC, CMAs, transit providers, and human services providers to adopt and implement this plan. **Figure 5.3** lists each component of the previously listed strategies. The recommended timeline for implementing each recommendation is included in the figure. The timeline categorizes the recommendations into the following periods: **Keep the Momentum (next 6-12 months)**, **Implement the Basics (next 1-2 years)**, and **Build Out the Program (next 3-5 years)**. Each recommendation is also marked with the anticipated level of effort required for implementation. These are categorized as minimal, moderate, and high.

**Figure 5.3** Implementation Timeline

Strategy	Recommendation	Timeline	Level of Effort
<b>STRATEGY 1: COUNTY-BASED MOBILITY MANAGEMENT</b>	Recognize Mobility Management as a Regional Priority	Keep the Momentum (next 6-12 months)	Minimal
	Set Schedule for Coordination Summits and Assess Opportunities to Incentivize Coordination	Keep the Momentum (next 6-12 months)	Minimal
	Identify Sustainable Sources of Flexible Funding for County-Based Mobility Management	Implement the Basics (next 1-2 years)	Moderate
	Plan and Implement Mobility Management Technical Assistance Program	Implement the Basics (next 1-2 years)	High
	Implement Regular Coordination Summits	Implement the Basics	Moderate
	Create Consolidated Transportation Service Agencies and Seek Funding for County-Based Mobility Manager Positions	Build Out the Program (next 3-5 years)	High
<b>STRATEGY 2: IMPROVE PARATRANSIT</b>	Begin Policy Discussion around Medi-Cal Cost Recovery Program for the Bay Area	Keep the Momentum (next 6-12 months)	Moderate
	Convene Task Force to Assist in Implementation of In-Person Eligibility	Implement the Basics (next 1-2 years)	Moderate
	Take Opportunities to Expand Subsidized Same-Day Trip Programs	Implement the Basics (next 1-2 years)	Moderate
	Implement Medi-Cal Cost Recovery Program	Build Out the Program (next 3-5 years)	High
<b>STRATEGY 3: PROVIDE MOBILITY SOLUTIONS TO SUBURBAN AREAS</b>	Define the Channels to Provide Shared Mobility Technical Assistance	Keep the Momentum (next 6-12 months)	Moderate
	Fund Low-Income Vehicle Programs	Implement the Basics (next 1-2 years)	High
	Prioritize One-Click Systems	Build Out the Program (next 3-5 years)	High
<b>STRATEGY 4: MEANS BASED FARE*</b>	Build Consensus for Implementation of Means-Based Fares	Keep the Momentum (next 6-12 months)	High
<b>STRATEGY 5: SHARED AND FUTURE MOBILITY OPPORTUNITIES*</b>	Advocate for Equity in Shared and Autonomous Mobility Services	Implement the Basics (next 1-2 years)	Moderate
<b>STRATEGY 6: IMPROVE MOBILITY FOR VETERANS</b>	Create a Forum for Veterans' Mobility Needs	Implement the Basics (next 1-2 years)	Moderate
	Identify Funding for Veterans'-Specific Mobility Services	Build Out the Program (next 3-5 years)	High

\*Pending Commission Direction



# Metropolitan Transportation Commission

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## Legislation Details (With Text)

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**File #:** 21-0128      **Version:** 1      **Name:**

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**Title:** MTC Equity Update: Equity Consultant Bench  
On-Call Equity Bench.

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**Attachments:** [06\\_On-Call Equity Bench update\\_EandA.pdf](#)

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**Subject:**

MTC Equity Update: Equity Consultant Bench

On-Call Equity Bench.

**Presenter:**

Nalungo Conley

**Recommended Action:**

Information

**Attachments:**

**Metropolitan Transportation Commission**  
**Policy Advisory Council Equity & Access Subcommittee**

January 11, 2021

Agenda Item 6

**MTC Equity Update: Equity Consultant Bench**

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**Subject:** On-Call Equity Bench.

**Background:** An update was recently provided to the MTC Administration Committee on the agency's ongoing Equity Platform Initiatives at their December 9<sup>th</sup> meeting. Part of that update spoke to MTC staff's work to develop an On-Call Equity Bench for internal and external services. The presentation to this group is to provide the Equity and Access Committee with an overview of the purpose and function of the Equity Bench as a resource for implementing the Equity Platform, for building capacity among project teams to define equity goals and metrics, and to be a technical resource in how to anchor equity in our project implementation, delivery, and outreach. The bench is designed to assist MTC's goal of fostering closer relationships and contract opportunities for the region's Community Based Organizations (CBOs), and other underrepresented stakeholders.

The On-Call Bench will have five (5) categories that proposers can apply under. They are as follows:

1. **Internal Operations:** This focus area looks at the internal processes of the agency, including but not limited to designing an equity strategic plan, Human Resource recruitment practices, retention within the agency, trainings with a focus on racial equity, professional development, succession planning, contracting practices, cultural assessments, and mentoring opportunities. The goal of this category is to look at how organizational transformations advance equity and eliminate internal disparities.
2. **Investments & Policy:** Restructure protocols and procedures to assess and understand the impact of resource investments on systemically marginalized communities. This involves designing/applying an equity toolkit to assess policies/practices and evaluating through an equity lens the distribution of benefits and burdens, who pays, and who decides. Through data informed approaches both experiential and quantitative, understand the value, the role, and the sphere of decision-making related to transportation, affordable housing, micro-mobility, and other public infrastructure investments.
3. **Community and Partner Engagement:** MTC and ABAG are seeking to tap into the expertise and relationships of Organizations that are already active in communities within our nine-county region and enlist their assistance in engaging their community residents. We at MTC seek to advance authentic community engagement by deeply listening to communities to identify and co-develop solutions to on-going challenges within their areas. Partnering with existing Community Based Organizations (CBOs) and leveraging their subject matter expertise and their long-standing history in low income and Communities of Color to advance equitable outcomes is our primary goal.



4. **Innovation:** Using new technologies, apps, platforms and new mobility models to reflect the needs of low-income and communities of color as well as those workers who do not have traditional peak-hour schedules. Re-imagining, refocusing, or revitalizing traditional approaches to service delivery models or project management, into a nimble approach that anticipates the needs of low-income communities and communities of color in the region as it relates to the MTC/ABAG workplan (Transportation, Housing, Land Use, Economic Development).
5. **Environmental Justice:** Design and promote integrated strategies to shape healthy, prosperous, and inclusive communities through focusing on improved environmental outcomes and land use planning, investment, program delivery, and evaluation. This category focuses on improving the health, economic, and environmental justice outcomes by promoting strategies that understand the linkage between the different factors and aims to address historic underinvestment in certain areas.

**Who Can Use:** This is foremost a resource for MTC/ABAG staff but it has been developed with Cooperative use language that will allow any agency that supports that type of contracting the ability to either directly contract with an agency on the list or engage in a targeted RFP process.

**Highlights:** Recognizing that there are resource and capacity issues that can impact the participation of our contracting process by small Community Based Organizations, non-profits, and individuals, we have strived to create a process that is less restrictive but will still result in a diverse, qualified, and robust participant list.

We are implementing the following steps in an attempt to make the contracting process less restrictive for smaller organizations:

1. We have removed all *Required Qualifications* from the RFQ. Often these provide heavy barriers for smaller firms to navigate, so we have instead replaced them with a *Desired Qualifications* section. This will allow proposers to highlight their experience, their relationships in a way that focuses less on a more prescribed package of qualifications but instead brings forward their experience and technical expertise as it relates to each individual category.
2. Each Category will have a *Proposal Guide* that will provide a template for less seasoned proposers to follow so that navigating the application process will not rely strictly upon familiarity with the system and instead focus on the benefits that they will bring to any partnership with MTC.

3. Working with Contracts and Risk Management to reduce the limits of insurance that agencies must carry to better align with inherent risk of the contract itself rather than a "one-size-fits-all" approach. This will allow smaller agencies to not bear the burden of holding high levels of insurance for small dollar contracts; only having to increase that amount when a threshold is reached.

**Next Steps:** The RFP was posted in late December and we plan to bring a recommendation for the equity bench to the March 2021 Administration Committee for approval. We can also provide an update on the final bench actions to E&A in March or early April 2021.

**Recommendation:** This item is provided for information only.

**Attachments:** PowerPoint: On-Call Equity Bench

# On-Call Equity Bench

Nalungo Conley

Chief of Staff, MTC

January 11, 2021



## CATEGORIES



### Internal Operations

Internal processes of the agency



### Investments & Policy

Impact on systemically marginalized communities



### Community & Partner Engagement

Relationship-based engagement



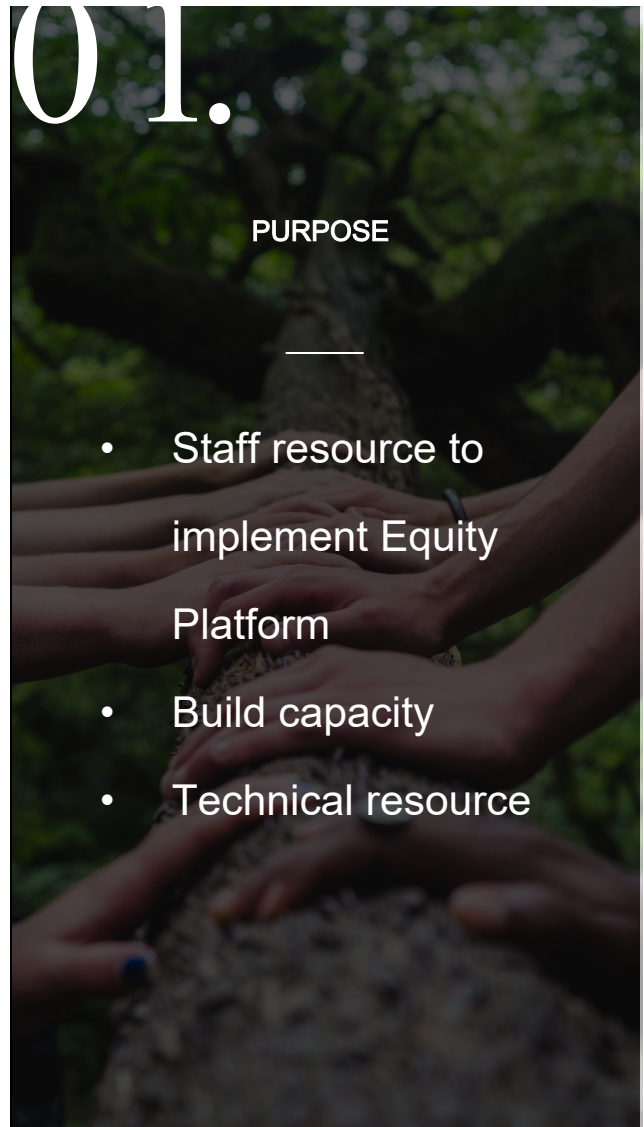
### Innovation

Technology to address needs of populations of color and/or people earning low-income



### Environmental Justice

Strategies to shape healthy, prosperous and inclusive communities



## PURPOSE

- Staff resource to implement Equity Platform
- Build capacity
- Technical resource

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## WHO CAN USE

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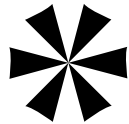
- MTC/ABAG staff
- Regional Partners
- Cooperative Use Language to directly contract or engage in RFP process

- Bidders conference
- Establishing review panels
- Committee/Commission action in March/April 2021

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## NEXT STEPS

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THANK YOU

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