



#### **Meeting Agenda**

#### **Blue Ribbon Transit Recovery Task Force**

Monday, February 22, 2021

1:05 PM

Board Room - 1st Floor (REMOTE)

The Blue Ribbon Transit Recovery Task Force will meet on Monday February 22, 2021 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/89769780906
Join by Telephone: 888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)
Webinar ID: 897 6978 0906
International numbers available: https://bayareametro.zoom.us/u/kbFR6wTLpT

Detailed instructions on participating via Zoom are available at: https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom.

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

#### 1. Roll Call / Confirm Quorum

A quorum of this Task Force shall be a majority of its voting members (17)

#### 2. Chair Comments

Commissioner Jim Spering

#### 3. Consent Calendar

**3a.** <u>21-0271</u> Minutes of the January 25, 2020 Meeting

Action: Approval

Attachments: Draft Minutes BRTRTF 2021 01 25

BRTRTF Equity Principles (Adopted January 25, 2021)

**3b.** <u>21-0272</u> BRTRTF #9 Meeting Summary (January 25, 2021)

<u>Action:</u> Approval

Attachments: BRTRTF Mtg #9 Summary (January 25, 2021)

3c. 21-0273 Minutes of January 28, 2021 and February 1, 2021 with Transit Operators

Action: Approval

Attachments: Draft Minutes BRTRTF Special Meeting Small Operators 2021 01 28

Draft Minutes BRTRTF Special Meeting Large Operators 2021 02 01

#### 4. Network Management and Governance (Goal 3)

Proposed Revisions to the Problem Statement will be presented to the Task Force for

approval. The Task Force will continue its network management discussion.

**4a.** 21-0329 Revised Network Management Problem Statement

Action: Approval

Presenter: Steve Kinsey, CivicKnit

<u>Attachments:</u> Revised Problem Statement

**GM Comments on Problem Statement** 

Item 4a,b,c Combined Network Mgmt PPT 20210222

**4b.** 21-0330 Network Management Evaluation Consultant Update

<u>Action:</u> Information

<u>Presenter:</u> MTC Staff

**4c.** 21-0328 Network Management Roles & Responsibilities

Action: Information

<u>Presenter:</u> Ad Hoc Working Group and Steve Kinsey, CivicKnit

#### 5. Public Comments / 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.

**5a.** 21-0274 Other Business Handouts

Attachments: Operator Financial Update

Outreach and Engagement Update

Transit Operator Board Presentations Summarized

Operator Financial and Service Status Update - February 2021

Outreach and Engagement Update

Summary of Transit Agency Board Information Sessions

**5b.** 21-<u>0370</u> Public Comments

Attachments: Joint GM Letter to BRTF FINAL (2-17-21)

#### 6. Meeting Summary

Steve Kinsey, CivicKnit

#### 7. Adjournment / Next Meeting

The next meeting of the Blue Ribbon Transit Recovery Task Force will be held Monday, March 22, 2021 at 1:05 p.m. remotely and by webcast as appropriate. Any changes to the schedule will be duly noticed to the public.

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

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

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

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

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

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

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

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



## Metropolitan Transportation Commission

### Legislation Details (With Text)

File #: 21-0271 Version: 1 Name:

Type: Minutes Status: Committee Approval

File created: 1/28/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Minutes of the January 25, 2020 Meeting

Sponsors:

Indexes:

Code sections:

Attachments: Draft Minutes BRTRTF 2021 01 25

BRTRTF Equity Principles (Adopted January 25, 2021)

Date Ver. Action By Action Result

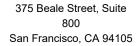
Subject:

Minutes of the January 25, 2020 Meeting

**Recommended Action:** 

Approval

Attachments:





#### **Meeting Minutes - Draft**

#### **Blue Ribbon Transit Recovery Task Force**

Monday, January 25, 2021

1:05 PM

Board Room - 1st Floor (REMOTE)

#### 1. Roll Call / Confirm Quorum

Present: 31 - Chair Spering, Member Pedroza, Member Josefowitz, Member Papan, Member

Rabbitt, Member Worth, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Hartnett, Member Tumlin, Member Halls, Member Baker, Member Wu, Member Kinman, Member Chiu, Member Kim, Member Lindsay, Member Murphy, Member Griffiths, Member Wunderman, Member Rotchy, Member Ford, Member Grisby,

Member Chavez, Member Cortese, and Member Tran

Absent: 1 - Member Haggerty

Member Beall was replaced by Member Cortese, Member Chavez was added, Member Fernandez was replaced by Member Tran.

#### 2. Chair Comments

#### 3. Consent Calendar

Upon the motion by Member Papan and second by Member Kinman,the Consent Calendar was unanimously approved. The motion carried by the following vote:

Aye: 30 - Chair Spering, Member Pedroza, Member Josefowitz, Member Papan, Member

Rabbitt, Member Worth, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Hartnett, Member Tumlin, Member Baker, Member Wu, Member Kinman, Member Chiu, Member Kim, Member Lindsay, Member Murphy, Member Griffiths, Member Wunderman, Member Rotchy, Member Ford, Member Grisby, Member Chavez,

Member Cortese and Member Tran

Absent: 2 - Member Haggerty and Member Halls

3a. 21-0135 Minutes of the December 14, 2020 Meeting

Action: Approval

Attachments: DRAFT Minutes BRTRTF December 14, 2020

**3b.** <u>21-0136</u> BRTRTF #8 Meeting Summary (December 14,2020)

Action: Approval

Attachments: BRTRTF #8 Meeting Summary Memo

#### 4. Advancing Equity (Action Plan Goal 2)

Upon the motion by Member Wu and seconded by Member Grisby, Revised Equity Principles was approved. The motion carried by the following vote:

Aye: 30 - Chair Spering, Member Pedroza, Member Josefowitz, Member Papan, Member

Rabbitt, Member Worth, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Hartnett, Member Tumlin, Member Baker, Member Wu, Member Kinman, Member Chiu, Member Kim, Member Lindsay, Member Murphy, Member Griffiths, Member Wunderman, Member Rotchy, Member Ford, Member Grisby, Member Chavez,

Member Cortese and Member Tran

Absent: 2 - Member Haggerty and Member Halls

Member Halls arrived after the approval of Revised Equity Principals

4a. 21-0137 Present Revised Equity Principles

Action: Approval

**Presenter:** Steve Kinsey, CivicKnit

Attachments: Present Revised Equity Principles

The following individuals spoke on this Item:

Debbie Toth, Choice in Aging

#### 5. Current Regional Initiatives (Action Plan Goal 4)

**5a.** 21-0139 Present Ongoing Bay Area Transit Initiatives

<u>Action:</u> Information

<u>Presenter:</u> MTC Staff

<u>Attachments:</u> Present Ongoing Bay Area transit initiatives

The following individuals spoke on this Item:

Adina Levin; and Richard Hedges.

#### 6. Network Management (Action Plan Goal 3)

**6a.** 21-0138 Present Draft Problem Statement

Action: Information

Presenter: Steve Kinsey, CivicKnit and Working Group members

Attachments: Draft Problem Statement

Presentation Goal 3 Network Management Problem Statement

**6b.** <u>21-0174</u> Discussion- Possible Network Management Roles and Responsibilities

Action: Information

Presenter: Steve Kinsey, CivicKnit

<u>Attachments:</u> Presentation Possible Network Management Roles and

Responsibilities

The following individuals spoke on this Item:

Adina Levin, Friends of CalTrain;

Steve Kinsey read a Comment received by Jim Schmidt;

Roland Lebrun; David Pilpel; and Aleta Dupree.

#### 7. Public Comments / Other Business

7a. 21-0140 Correspondence Received and Other Business Handouts

Attachments: Operator Ridership Update Handout

Mr. Jim Schmidt Public Comment

- 8. Meeting Summary
- 9. Adjournment / Next Meeting

The next meeting of the Blue Ribbon Transit Recovery Task Force will be held Monday, February 22, 2021 at 1:05 p.m. remotely and by webcast as appropriate.



## **Blue Ribbon Transit Recovery Task Force - Equity Principles**

(Approved with amendments 1/25/21)

Principles	Description
Invest Equitably	Prioritize equitable planning, policies, decision-making, and implementation through proportionally greater investments in communities of color and low-income communities to address transit disparities and reflect needed mobility options.
Increase Accessibility	Increase transit access, prioritize service investments, and improve travel experiences for seniors, riders with disabilities and/or low incomes by increasing fare affordability and service connectivity.
Be Inclusive	Pursue anti-racist strategies as a core element of transit's mission and actions. Ensure full participation of underserved residents to co-create strategies and solutions by engaging meaningfully and directly, in partnership with culturally specific, community-trusted local organizations.
Use Data to Inform Decisions	Make people-centered and transparent transit investment and strategy decisions by collecting and using race, gender identity, disability, age and income data. Routinely monitor data to ensure equitable investments for underserved communities.
Advance Health & Safety	Incorporate public health and safety measures for transit riders and staff in the day-to-day operations of the transit system. Partner with social service and public health agencies to improve personal health and safety of riders and staff.



## Metropolitan Transportation Commission

### Legislation Details (With Text)

File #: 21-0272 Version: 1 Name:

Type: Action Item Status: Committee Approval

File created: 1/28/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: BRTRTF #9 Meeting Summary (January 25, 2021)

Sponsors:

Indexes:

**Code sections:** 

Attachments: BRTRTF Mtg #9 Summary (January 25, 2021)

Date Ver. Action By Action Result

Subject:

BRTRTF #9 Meeting Summary (January 25, 2021)

**Recommended Action:** 

Approval

Attachments:



TO: Blue Ribbon Transit Recovery Task Force DATE: February 22, 2021

FR: Steve Kinsey, CivicKnit

**RE: BRTRTF Meeting #9 Summary** 

#### Mutual Understanding from Task Force Meeting #9:

- 1. Five Equity Principles were adopted unanimously.
- 2. There is broad support for improving the bus priority approval process.

#### Additional Information requested to be included in a future Task Force Meeting:

- 1. The Chair requested Fare Coordination and Integration Study and Mapping & Wayfinding project updates in May.
- 2. The correct level of authority for network management needs to be decided.

#### **Identified Concerns:**

- Where the division in authority between local and regional service is needed.
- 2. There is no entity accountable for the effectiveness of the entire transit system.
- 3. Language communication is important to consider when addressing equity.
- 4. Elders are not being sufficiently considered in equity discussions.

#### **Meeting Summary**

Chair Spering began by acknowledging State Senator Dave Cortese to replace Jim Beall and thanking him for continuing to participate in the Task Force from his new office. He also recognized Evelynn Tran, who is replacing Nuria Fernandez due to her new position in the Biden Administration. In closing, Chair Spering recognized the additional critical federal relief funds coming to the Bay Area. The Consent Agenda was approved without comment.

A primary outcome of the meeting was final consideration and approval of the Action Plan Equity Principles. Wide appreciation was expressed for the CBO representatives who contributed their insight as initial draft Principles were revised. During the discussion leading to unanimous approval, Members mentioned that meeting the language requirements for communicating with the South Bay Vietnamese community was important and that elders are also a marginalized a population. The final draft "Invest Equitably" Principle was revised to cite the importance of incorporating equity practices into both policy and implementation aspects of transit.

MTC Executive Director McMillan, followed by other staff, presented information on the agencies ongoing initiatives focused on fare integration, wayfinding and mapping and bus priority infrastructure. Caltrans Acting District 4 Director, Dina El-Tawansy, expressed her agency's support for "low-hanging fruit" type bus priority improvements on state highways and recognized that bus on shoulder has succeeded in some areas. In response to a question from the Chair, MTC

Deputy Executive Director Fremier stated that design of the presented projects was funded, and that several capital funding sources are being explored, though not secured.

Task Force comments included suggestions for: improved communication in hub locations, the need for much stronger, binding agreements to accelerate transit priority projects, support for MTC's BATA Recovery Task Force, the opportunity for coordinated network management to accelerate all three initiative areas, the equity value that faster bus travel provides, the climate response value of increasing transit speeds, creating public-private partnerships for paratransit and the need for state legislation to extend rule relaxations granted during COVID. Public speakers mentioned that good wayfinding depends upon fare integration, High occupancy toll lanes slow transit and expressed support for CEQA exemptions for rail and bus projects.

The facilitator presented the culmination of research into a draft Problem Statement, thanking the thirteen member working group that met twice and caucused outside of meetings to provide the substance of the draft. Task Force comments included that improved coordination doesn't require entirely new funding, elevating the importance of transit priority bus projects, the need for a long range regional transit plan, the need to address accountability as much as authority and funding, the importance of new funding in addition to other efficiencies to reach world-class capability and that network management could help coordinate the interdependencies between transit, housing and environmental goals. Public comments were received via email and others were invited to comment before the following meeting.

The facilitator introduced a list of 18 possible network management roles developed during the course of presentations and comments at Task Force meetings and asked whether items should be added or removed.

Task force members comments on missing elements included health and safety, equity oversight, network design, customer experience, coordination with 1<sup>st</sup>/last mile options including bike/ped and big data management. Other comments included the need to prioritize from the list, favoring more centralized control of some items, distinguishing between local and regional service, highlighting the value of enhanced transit hubs, capital project prioritization and improved coordination among agencies.

Public comments included that equity and connectivity were key points in Caltrain's recent campaign, BRTF's meeting conflicts with Caltrain's Finance Committee meeting, the challenge of where to provide public comment with numerous efforts underway, encouragement to use agreements more than governance changes and the impact of low frequencies on ridership.

Chair Spering cautioned that network management reforms should be done so as not to make it more difficult for operators to deliver their services. Network Management roles will be discussed further in subsequent Task Force meetings.



## Metropolitan Transportation Commission

#### Legislation Details (With Text)

File #: 21-0273 Version: 1 Name:

Type: Action Item Status: Committee Approval

File created: 1/28/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Minutes of January 28, 2021 and February 1, 2021 with Transit Operators

Sponsors:

Indexes:

**Code sections:** 

Attachments: Draft Minutes BRTRTF Special Meeting Small Operators 2021 01 28

Draft Minutes BRTRTF Special Meeting Large Operators 2021 02 01

Date Ver. Action By Action Result

#### Subject:

Minutes of January 28, 2021 and February 1, 2021 with Transit Operators

#### **Recommended Action:**

Approval

#### Attachments:



375 Beale Street, Suite 800 San Francisco, CA 94105

#### **Meeting Minutes - Draft**

#### **Blue Ribbon Transit Recovery Task Force**

Thursday, January 28, 2021

5:05 PM

Board Room - 1st Floor (REMOTE)

#### \*\*\*Special BRTRTF Meeting with Small Transit Operators\*\*\*

Small Transit Operators Invited to this Meeting:

Altamont Corridor Express (San Joaquin Regional Rail Commission)

Central Contra Costa Transit Authority (County Connection)

Petaluma Transit

**Union City Transit** 

Eastern Contra Costa Transit Authority (Tri Delta Transit)

Fairfield and Suisun Transit (FAST)

Livermore Amador Valley Transit Authority (LAVTA)

Marin Transit

Napa Valley Transportation Authority (VINE)

Santa Rosa City Bus

SF Bay Area Water Emergency Transportation Authority (WETA)

Solano County Transit (SolTrans)

Solano Transportation Authority (Solano Express)

Sonoma County Transit

Sonoma Marin Area Rail Transit District (SMART)

Western Contra Costa Transit Authority (WestCAT)

Vacaville City Coach

#### 1. Roll Call / Confirm Quorum

Present: 14 - Chair Spering, Member Pedroza, Member Papan, Member McMillan, Member

Ramacier, Member Mulligan, Member Tree, Member Whelan, Member Halls, Member Kinman, Member Lindsay, Member Griffiths, Member Rotchy, and Member

Ford

Absent: 18 - Member Haggerty, Member Josefowitz, Member Rabbitt, Member Worth, Member

Hursh, Member Powers, Member Hartnett, Member Tumlin, Member Baker, Member Wu, Member Chiu, Member Kim, Member Murphy, Member Wunderman,

Member Grisby, Member Tran, Member Chavez, and Member Cortese

No Action was taken in this meeting

#### 2. Chair Comments

#### 3. Presentation on Blue Ribbon Transit Recovery Task Force

21-0232 Presentation on Blue Ribbon Transit Recovery Task Force

Action: Information

Presenter: Commissioner Jim Spering and Therese W. McMillan, MTC

Attachments: Cover Memo

Presentation to Small Transit Operators

**Draft Problem Statement** 

The following individuals spoke on this Item:

David Pilpel; and Roland Lebrun.

- 4. Public Comments / Other Business
- 5. Closing Remarks
- 6. Adjournment



375 Beale Street, Suite 800 San Francisco, CA 94105

#### **Meeting Minutes - Draft**

#### **Blue Ribbon Transit Recovery Task Force**

Monday, February 1, 2021

5:05 PM

Board Room - 1st Floor (REMOTE)

\*\*\*Special BRTRTF Meeting with Large Transit Operators\*\*\*

Large Transit Operators invited to this Meeting: San Francisco Municipal Transportation Agency (SFMTA) Bay Area Rapid Transit District (BART) Alameda-Contra Costa Transit District (AC Transit) Santa Clara Valley Transportation Authority (VTA) Peninsula Corridor Joint Powers Board (Caltrain) San Mateo County Transit District (Samtrans) Golden Gate Bridge, Highway & Transportation District (Golden Gate Transit & Golden Gate Ferry)

#### 1. Rollcall/Confirm Quorum

Present: 17 - Member Lindsay, Member Griffiths, Member Rotchy, Chair Spering, Member Pedroza, Member Papan, Member Rabbitt, Member McMillan, Member Hursh, Member Powers, Member Ramacier, Member Mulligan, Member Whelan, Member

Hartnett, Member Tumlin, Member Baker, and Member Kinman

Absent: 15 - Member Murphy, Member Wunderman, Member Ford, Member Grisby, Member Tran, Member Haggerty, Member Josefowitz, Member Worth, Member Tree, Member Halls, Member Wu, Member Chiu, Member Kim, Member Chavez, and Member Cortese

Page 1

No Action was taken in this meeting

#### 2. Chair Comments

#### 3. Presentation on Blue Ribbon Transit Recovery Task Force

21-0262 Presentation on Blue Ribbon Transit Recovery Task Force

Action: Information

Presenter: Commissioner Jim Spering and Therese W. McMillan, MTC

Attachments: Cover Memo

Presentation to Large Transit Operators

**Draft Problem Statement** 

The following individuals spoke on this Item:

Adina Levin, Friends of CalTrain and TEAMC San Mateo Justice Coalition;

Roland Lebrun; and Richard Hedges.

- 4. Public Comments / Other Business
- 5. Closing Remarks
- 6. Adjournment



## Metropolitan Transportation Commission

#### Legislation Details (With Text)

File #: 21-0329 Version: 1 Name:

Type: Report Status: Committee Approval

File created: 2/3/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Revised Network Management Problem Statement

Sponsors:

Indexes:

**Code sections:** 

Attachments: Revised Problem Statement

**GM Comments on Problem Statement** 

Item 4a,b,c Combined Network Mgmt PPT 20210222

Date Ver. Action By Action Result

#### Subject:

Revised Network Management Problem Statement

Presenter:

Steve Kinsey, CivicKnit

**Recommended Action:** 

Approval

**Attachments:** 



TO: Blue Ribbon Transit Recovery Task Force DATE: February 22, 2021

FR: Steve Kinsey, CivicKnit

RE: Modifications to Draft Problem Statement

Following Task Force input in December, a draft Problem statement was presented at the January 25<sup>th</sup> Task Force meeting for review and discussion. At its upcoming meeting the Task is scheduled to adopt a Final Problem Statement.

The revised Problem Statement provided for your review incorporates comments made at the January BRTF meeting and individual emails and one submitted by jointly by large and smaller operators. The following list describes the key changes proposed in the Revised Draft Problem Statement:

- **Context** section specifically identifies statistical information sources.
- Problem Statement Summary
  - o modified to use operators' preferred text to describe their institutional purpose
  - o Text on lack system-wide coordination entity moved to bulleted section
- Organizational/Institutional Challenges section was modified as follows:
  - o a stand-alone indication of the importance of transit priority projects
  - o school service was removed because of great local variation in need and service
- Customer Experience
  - o changed in several instances to reflect variations among operator's situations and acknowledge some studies are underway.
- Past and Current Disparities
  - o Substantially rewritten based on alternative text provided by Operators
- Transit Costs and Funding
  - o additional funding needed for more than regional transit coordination
  - o policy tradeoffs must be considered before shifting existing funding.

On February 11<sup>th</sup>, the Operators submitted comments via email on the draft Problem Statement and proposed an alternative approach. A copy is provided for your review and consideration. The operators may ask the Task Force to replace the revised draft Problem Statement with their version. If so, there will be discussion and potential action on their request.

DRAFT February 22, 2021

#### **BLUE RIBBON**



#### TRANSIT RECOVERY TASK FORCE

#### **Context**

By June 2021, the **Blue Ribbon Transit Recovery Task Force (BRTF)** is expected to submit a Transit Transformation Action Plan (Plan) that identifies actions needed to re-shape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area and beyond. In November 2020, the BRTF adopted four Plan goals, including Goal 3A, which states:

"Develop a clear Problem Statement that addresses what issues or problems Network Management reforms seek to resolve."

Working toward this result is not a new idea.

- MTC's Resolution 3866 incorporates nearly 50 years of legislated transit coordination mandates, including
  administering fare revenue-sharing, governing inter-operator transfers, and deciding discretionary fund
  sources and amounts to achieve coordination and connectivity.
- In 2012, MTC adopted the Transit Sustainability Project, which identified specific goals and objectives related to ridership, customer-focus, and regional coordination.<sup>1</sup>
- In 2019-2020, FASTER, a multi-stakeholder effort, developed a strategy and funding plan to achieve more coordinated transit planning, effective project delivery, and more integrated fares and schedules.
- In 2019- Assembly Member Chiu introduced AB2057, state legislation that prioritized institutional reforms that would support a more seamless public transportation network, including ensuring core levels for transit-dependent populations.
- In 2021, MTC's Plan Bay Area 2050 Blueprint identified a number of beneficial transit program
  enhancements needed to create an expanded, fast, frequent, efficient and safe multi-modal
  transportation system that includes efficient intercity trips complemented by a suite of local
  transportation options.

In spite of these efforts, significant barriers to the BRTF's vision still exist and must be addressed in a region where physical geography, jurisdictional boundaries, urban settlement patterns and travel patterns overlap and intersect in complicated ways, while also considering how megaregional and interregional travel services will interface with the Bay Area system. Currently, the COVID-19 pandemic has created an acute, existential crisis for transit, with an average reduction in ridership of 77% by the end of 2020, <sup>2</sup> and it is unclear when, and to what extent, ridership will return.

<sup>&</sup>lt;sup>1</sup> MTC-Transit Sustainability Project, May 2012- Five agencies (AC Transit, BART, Caltrain, Muni, and VTA) identified customer focus as a goal. Three agencies (AC Transit, Caltrain, and SamTrans) specifically identified connecting to, coordinating with, or cooperating with other transportation or transit providers as a goal. AC Transit described its goal as providing a "transit system [that is] seamless to the passenger regardless of the agency. Services, transfers and fares must be transparent to the passenger."

<sup>&</sup>lt;sup>2</sup> Operator provided information; from BRTF meeting/ December 14, 2020

Pre-pandemic, a UCLA study<sup>3</sup> determined that in 2017 and 2018, the Bay Area lost over 5% of its annual riders, despite a booming economy and service increases. The decline occurred even as most major operators increased service in terms of both mileage and hours of operation. The steepest ridership losses came on buses, at off-peak times, on weekends, in non-commute directions, on outlying lines, and on lines that did not serve the region's core employment clusters. It also cited ride-sharing as a possible cause of declining transit ridership.

Transit also faces substantial financial challenges. Operating expenses are subject to intense inflationary pressures and capital construction costs have escalated precipitously over the past decades. Locally-generated sales or property taxes have restrictions limiting an agency's ability to serve areas outside their county and local return on services is critical to retain public support. In world-wide systems cited as comparison, there is significantly greater funding dedicated to public transit.

Some factors contributing to transit's ridership decline and equitable access cannot be solved by operators alone. Bay Area governments and the planning profession at large have played a central role in systematically denying opportunities to Black people and other minorities through practices like redlining, the clearance of neighborhoods for construction of urban highways, exclusionary zoning, redevelopment, policing bias and outright discrimination and segregation. Low gasoline prices also affect public transit ridership in the Bay Area.

If sustained, this decline in ridership threatens to plunge the region's transit system into a downward spiral, jeopardizing both the near and long term financial viability of individual transit operators, negatively impacting riders, and fundamentally undermining the value of the public's past and future investments in transit as a public good.

<sup>&</sup>lt;sup>3</sup> "What's Behind Recent Transit Ridership Trends in the Bay Area?" February, 2020. Authors: Evelyn Blumenberg, PhD, Mark Garrett, PhD, Hannah King, Julene Paul, Madeline Ruvolo, Andrew Schouten, PhD, Brian D. Taylor, PhD, FAICP, Jacob Wasserman

#### **Problem Statement Summary**

Public transit services in the San Francisco Bay Area are operated by 27 agencies, each with its own unique policies, procedures and operating practices best suited for their immediate service areas and local priorities, and not organized to support customer-friendly, cross-jurisdictional travel. Strong collaborative action is needed to restore and grow transit ridership to reach the ambitious targets<sup>4</sup> associated with Plan Bay Area 2050's vision of a more affordable, connected, diverse, healthy, and vibrant Bay Area for all.

Below are key problems identified by the Ad Hoc Problem Statement Working Group.

#### **Organizational/Institutional Challenges**

- There is lack of transit priority on surface roads. Transportation institutions and decision-making procedures are not developing and managing rights of way in a coordinated manner, both regionally and in many cases locally, to optimize transit speed, service investments and the region's efforts to grow transit mode share and reduce greenhouse gas emissions.
- No network management entity with sufficient resources and authority ensures that multiple separate transit agencies plan, operate and are held accountable for providing equitable, inclusive, frequent, affordable, accessible, reliable, and integrated long-distance and cross-jurisdictional service.
- Cooperation on coordinated approaches across multiple agencies is time-consuming and unpredictable.
- Coordinated planning and services for paratransit and seniors does not exist. 6
- A lack of unified, robust data collection and management impedes nimble, *equivalent* service planning and performance evaluation.

#### **Customer Experience**

- Bus travel is slow and unreliable because of vehicles getting stuck in traffic, inefficient stop spacing and transfer facilities, and where schedules create long wait times.
- While being studied now, fares remain confusing, vary by agency, create penalties for using more than one operator, have inconsistent discount policies and are unaffordable for low income riders.
- While being studied now, a lack of unified services for trip planning, real-time information, mobile payment technologies and wayfinding maps and signage confuses existing riders and impedes opportunities to grow ridership.
- Large operators' customers are expressing greater rider health and safety concerns.<sup>7</sup>

#### **Past and Current Disparities**

- Failed regional housing and development policies have resulted in the displacement of low income and people of color to car-dependent communities, reducing full access to economic opportunities due to longer, less convenient, and more expensive mobility options.<sup>8</sup>
- There is no centralized plan to address the legacy of disenfranchisement and marginalization of these communities. Those most harmed by past and current exclusion are not centered throughout the development and implementation of future solutions.

#### **Transit Costs and Funding**

- Current and future service coordination efforts can only offer limited benefits without additional funding, which has not yet been identified.<sup>9</sup>
- Opportunities for administrative and operational efficiencies such as centralization of business functions and systems, unified data collection, procurement and delivery of capital investments varies greatly among transit operators depending on the type of service each provides.<sup>10</sup>
- No institutional leader is facilitating development of new transit revenue strategies that voters will support.
- Changing current funding levels or priorities cannot be done without understanding difficult tradeoffs.

<sup>&</sup>lt;sup>4</sup> MTC-PBA2050- A Blueprint for the Bay Area's Future, December 2020

<sup>&</sup>lt;sup>5</sup> MTC- Bay Area Core Capacity Study, September 2017

<sup>&</sup>lt;sup>6</sup> MTC- Coordinated Public Transit–HumanServices Transportation Plan Update, March 2013

<sup>&</sup>lt;sup>7</sup> BART, Caltrain Rider surveys

<sup>&</sup>lt;sup>8</sup> MTC- PBA 2040 Equity Analysis, July 2017 / MTC- PBA 2050 Equity and Performance Outcomes

<sup>&</sup>lt;sup>9</sup> MTC-Transit Sustainability Project, May 2012

<sup>&</sup>lt;sup>10</sup> MTC-Transit Sustainability Project, May 2012

February 10, 2021

To: Therese McMillan and Steve Kinsey

Re: Blue Ribbon Transit Recovery Task Force Problem Statement

Dear Therese McMillan and Steve Kinsey,

The General Managers of the Bay Area's largest transit system have reviewed the Draft Problem Statement and appreciate the time and energy of the representatives that participated in its development. We exist to serve the region and the public, and recognize that riders from across the region face challenges moving throughout our systems. We support improvements to our networks to better serve riders and meet the expectations of the public.

There is broad agreement that improvements to speed, frequency and reliability that can enhance transit service are critical to addressing the rider experience. Improved system coordination is another area that has been identified, with work already underway. These are critical items that can be addressed now, can assist our recovery over the next year, and can be achieved with or without the creation of a network manager.

We are concerned that the Draft Problem Statement needs more focus and clarity, with less generalization, in order to address the intent of the exercise itself: to distill the challenges facing transit riders in the Bay Area and to set the stage for identifying solutions. This letter reiterates the comments expressed by various General Managers in multiple forums over the past several weeks and presents them in a consolidated format. Attached to this document you will find detailed comments on the Draft Problem Statement (Attachment A).

As we are seeking to make meaningful and impactful changes to our existing transit system, we do want to advocate that adequate time is given to analysis and evaluation. The Problem Statement should be founded on an analysis of the existing system before we can proceed to the development of a business case that considers how to most effectively address the challenges faced by riders without undermining the viability of the existing network. The current timeline may not be adequate to fully evaluate if or where a network manager provides unique value.

Of paramount importance to the region's transit operators is recognition of the dire state of our collective finances. While SB1 was significant in restoring STA for transit and increasing overall transportation funding, funding needs continue to outpace revenues. Regionally, transit systems have long been underfunded and even quick action from the Task Force leaves new revenues years away. This legacy of underfunding our operations has eroded the foundations of our financial stability, a process which has exacerbated by the COVID-19 Pandemic. Our Agencies have largely avoided layoffs thanks to a combination of unprecedented levels of emergency support at the Federal level and by retrenching and consolidating our existing resources. Our attention has been dedicated to near-term safety, service and staffing imperatives. This work makes it challenging to consider longer-term changes that require a substantial reallocation of our limited resources without imperiling the service that our most vulnerable riders continue to depend upon in these uncertain times.

Acknowledging this reality, we are fully aware of the work we must undertake in order to re-attract riders as we begin to recover over this next year. We believe that there are several areas that this task force has identified that we can commit to addressing that are within our existing statutory authority. To that end we have included an Alternative Problem Statement and Approach (Attachment B), including a simplified problem statement, which we feel distills the issues and potential approach to increasing transit ridership and

Correspondence to Therese McMillan and Steve Kinsey February 10, 2021 Page 2

improving the customer experience. It also outlines an approach that focuses on the areas where we have seen a consensus among Task Force participants to date and where we believe we can make progress in the near term.

We also want to be clear: our work does not end with these measures, rather, it begins here. We can start the work of improving our existing network while we take the necessary time to complete the Bay Area Fare Coordination and Integration and Regional Wayfinding studies. We also propose additional new research to bring a data-backed foundation to the much-needed business case for regional integration across key areas while bringing in the context of our post-COVID realities, incorporating the findings from recent and current studies, and establishing a path for growing the necessary new revenues to implement this work successfully.

Sincerely,

District

Michael Hursh, General Manager Alameda-Contra Costa Transit Robert Powers, General Manager San Francisco Bay Area Rapid Transit District (BART)

Klast M. Powers

Jim Hartnett, General Manager/Executive Director San Mateo County Transit District/Caltrain

Evelynn Tran, General Counsel & Interim General Manager/CEO Santa Clara Valley Transportation Authority

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

Rick Ramacier, General Manager **County Connection** 

Jeffrey Tumlin, General Manager San Francisco Municipal Transportation Agency

Michael S. Tree, General Manager Livermore Amador Valley Transport Authority

Nancy Whelan, General Manager Marin Transit

Stancy C. Whelan

Seamus Murphy, **Executive Director** 

Water Emergency Transportation

Authority

Correspondence to Therese McMillan and Steve Kinsey February 10, 2021 Page 3

#### Attachment A:

#### Comments on the Draft Problem Statement

The Transit Operators collectively have the following comments with regard to the current Draft Problem Statement.

#### **Addressing Equity**

Of particular concern is that the "Past and Current Disparities" section doesn't fully capture the inequities associated with access to affordable and reliable transportation alternatives, particularly for people of color. Therefore, we recommend replacing the language in the section with:

- Local and regional transit systems are expected to address failed regional housing and development
  policies that have resulted in the displacement of low income and people of color to car-dependent
  communities. This has resulted in both increased costs associated with car ownership and an
  increasing share of disposable time spent commuting.
- This past and current exclusion has led to both intentional and unintentional disparities in accessible, affordable and reliable transportation.
- There is no centralized plan to address the legacy of disenfranchisement and marginalization of these communities. If those most harmed by past and current exclusion are not centered throughout the development and implementation of future solutions, the past and current harms will be perpetuated and/or exacerbated.

In addition, the language below should be added in the "Context" section to better explain how the region has come to inequitable transportation access:

Bay Area governments and the planning profession at large have played a central role in systematically denying opportunities to people of color through practices like redlining, the clearance of neighborhoods for construction of urban highways, exclusionary zoning, redevelopment, policing bias and outright discrimination and segregation in past decades.

#### Additional Context and Data Required to Support

The context section appears to draw information from the "What's Behind Recent Transit Ridership Trends in the Bay Area?" study completed by UCLA in early 2020. The study should explicitly be identified, especially since it was sponsored by MTC and is the most recent study on ridership, just prior to the pandemic. The study also identifies ride-sharing as a possible cause of declining transit ridership and thus should be mentioned in the context section.

#### **Other Comments**

#### <u>Introductory Paragraph</u>

 Replace: The current organizational structure of the San Francisco Bay Area's 27 agencies is not envisioned, designed, governed, or funded to deliver equitable, convenient, efficient sub-regional, regional or interregional transit mobility. With previous language that better incorporates the purpose of the regional providers: *Public transit services in the San Francisco Bay Area are operated by 27 agencies, each with its own unique policies, procedures and operating practices best suited for their immediate service areas and local priorities, and not organized to support customer-friendly, inter-agency regional travel.* 

• The working group was unified about the lack of transit priority on surface roads being a major problem. We would like to see this presented more prominently and explicitly. Where mentioned in last sentence of intro, lack of "public agency urgency" could be interpreted as the transit operators not advocating for transit priority strong enough, which wasn't the notion expressed by the Ad-hoc group. The public agencies should refer to the local jurisdictions or those that own public right-of-way that transit operates on.

#### Organizational/Institutional Challenges

- This section is overstated and makes generalized conclusions when, in fact, there are clear examples of regular transit operator coordination throughout the Bay Area, whether it be intentional, sub-regional planning and scheduling coordination in the North Bay, paratransit and fare discount coordination in Contra Costa County or mutual-aid coordination between BART and AC Transit.
- As expressed by board members at the recent outreach meetings, local control can benefit riders by being responsive to specific needs of unique communities. This may be lost depending on the proposed oversight structure.

#### Customer Experience

- We appreciate that the customer service section leads with speed and reliability as top bullet issues.
- There are efforts underway by MTC to improve transit wayfinding and fare coordination in the region. Though there are deficiencies, these efforts, which include broad transit operator participation, should be acknowledged.
- Though security is a major concern for some transit agencies (e.g. BART, AC Transit and SFMTA), it is not a primary concern for all transit agencies.

#### **Transit Costs and Funding**

- Funding is needed for much more than regional transit coordination. This point was made in both working group meetings and in written comments requesting to expand this characterization
- The type of administrative and operational efficiencies needed by each of the transit operators varies greatly and can depend on the type of service each provides. Additional research should be conducted to understand what efficiencies across agencies could be achieved through improved coordination.
- Though the Problem Statement attempts to point out the coordination deficiencies across transit
  agencies, it has not affected public perception relative to raising new revenue. Caltrain's Measure RR
  (2020), BART's Measure RR (2016), Regional Measure 2 (2004), Regional Measure 3 (2018) and
  multiple county sales tax measures have passed with strong public support. However,
  acknowledgment that far more revenue is needed should be emphasized.

Correspondence to Therese McMillan and Steve Kinsey February 10, 2021 Page 5

#### Attachment B:

#### Alternative Problem Statement and Approach

#### Simplified Problem Statement

The COVID-19 Pandemic has dramatically reduced the ridership of the Bay Area's transit system – and it is unclear when, and to what extent, ridership will return. In the near- term, the pandemic has created an acute, existential crisis for transit, and it has underscored and deepened the pre-existing problem of declining demand for transit in the region as a whole. If sustained, this decline in ridership threatens to plunge the region's transit system into a downward spiral, jeopardizing both the near and long term financial viability of individual transit operators, negatively impacting riders, and fundamentally undermining our ability to effectively serve the region. Pre-pandemic, the "What's Behind Recent Transit Ridership Trends in the Bay Area?" study completed by UCLA for MTC in early 2020 (UCLA Study) provides some guidance with Policy Framework to rebuild transit ridership.

Restoring and growing transit ridership will require an ongoing multi-front effort that addresses the challenges that transit faces across multiple geographies and levels of government. Much of this work is and will be focused at the local and sub-regional level- where the vast majority of transit trips currently occur. As we emerge from the pandemic, however, there is also a significant opportunity at the regional scale for us to work together - making our systems more efficient and coordinating and enhancing our services in ways that allow for the growth of a renewed and expanded regional transit network that better serves existing riders and attracts new ones to our service.

#### **Proposed Approach**

Using the UCLA Study, as well as transit operators data and expertise, the region's operators believe the Bay Area can focus improvements on the key trips, routes, and transfer points within the regional network that will make transit more attractive and convenient to all. As identified in the UCLA Study, key to this is increasing frequency and improving the speed and reliability of regional trips. To that end, we believe that the most important areas of focus for improvement should include:

- Developing equity initiatives that ensure regional transit is accessible and convenient to all, but especially the Bay Area's most vulnerable populations.
- Improving cross-jurisdictional trips and connections at regionally-significant hubs through better reliability and frequency.
- Advancing transit priority improvements that improve the speed and reliability of regional trips.
- Implementing capital improvements that improve conditions on key streets/corridors especially those shared by multiple agencies or that serve regional hubs.
- Providing clear and intuitive wayfinding and information across regional systems consistent with MTC's wayfinding study.
- Implementing the recommendations of the Fare Integration Study, due out later this year.



Transit Connections











TRANSIT RECOVERY
TASK FORCE

**BLUE RIBBON** 

GOAL 3: NETWORK MANAGEMENT AND GOVERNANCE

February 22, 2021



## GOAL 3

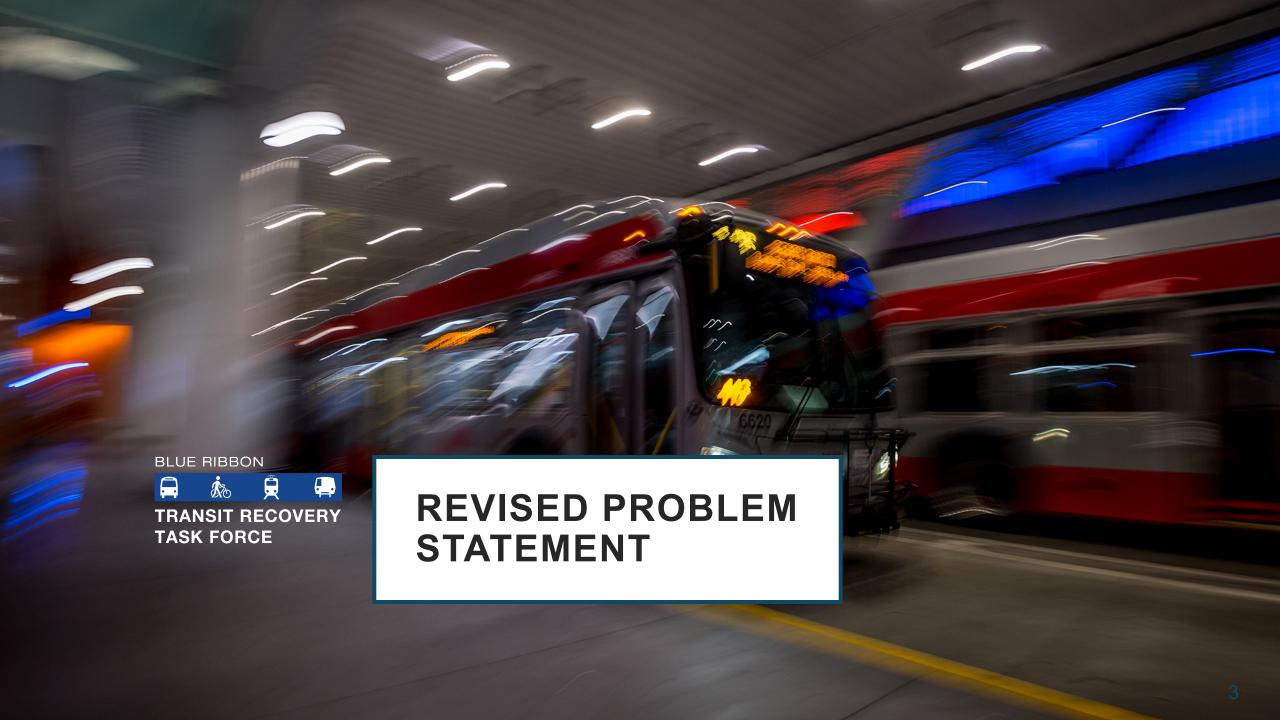
Identify near-term actions to implement beneficial long-term Network Management & Governance reforms

Develop business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation.

## **GOAL 4**

Establish how current MTC and state transit initiatives should integrate with *Network Management & Governance* reforms

Review the scope, timing, and decision process of current MTC and state transit initiatives and identify specific actions to integrate them with Management & Governance reforms.



## PROBLEM STATEMENT PROCESS



February 22, 2021

**BRTF Meeting #7** 

Nov 16

Task Force approved Action Plan Goals & Objectives

**BRTF Meeting #8** 

Dec 14

Reviewed Key Challenge Areas to set stage for Problem Statement

Ad Hoc Problem Statement Working Group

Jan. 8 + 15

Working Group met twice, plus additional calls between meetings

**BRTF Meeting #9** 

Jan. 25

Draft Problem Statement presented to Task Force for review and comment

**Ad Hoc Workshop** 

Feb. 17

Review and comment on Revised Draft Problem Statement

**BRTF Meeting #10** 

Feb. 22

Review, revise and adopt Problem Statement

## **KEY REVISIONS TO PROBLEM STATEMENT**



## The following list describes the key changes proposed in the Revised Draft Problem Statement:

- Context section specifically identifies statistical information sources.
- Problem Statement Summary
  - Modified to use operators' preferred text to describe their institutional purpose
  - Text on lack of system-wide coordination entity moved to bulleted section
- Organizational/Institutional Challenges modified to include:
  - A stand-alone indication of the importance of transit priority projects
  - School service was removed because of great local variation in need and service

### Customer Experience

 Changed in several instances to reflect variations among operator's challenges and acknowledge some studies are underway

### Past and Current Disparities

 Substantially rewritten based on alternative text provided by Operators

### Transit Costs and Funding

- Additional funding needed for more than regional transit coordination
- Policy tradeoffs must be analyzed before shifting existing funding.



# NETWORK MANAGEMENT: **EVALUATION PHASES**



#### **By JUNE 2021**

Blue Ribbon Task Force, Consultants

- Develop structure/ framework for business case analysis
- Identify business case data needs
- Identify Network Management governance alternatives
- Set "triggers" for initiating consultant's Network Management Evaluation

#### By DECEMBER 2021

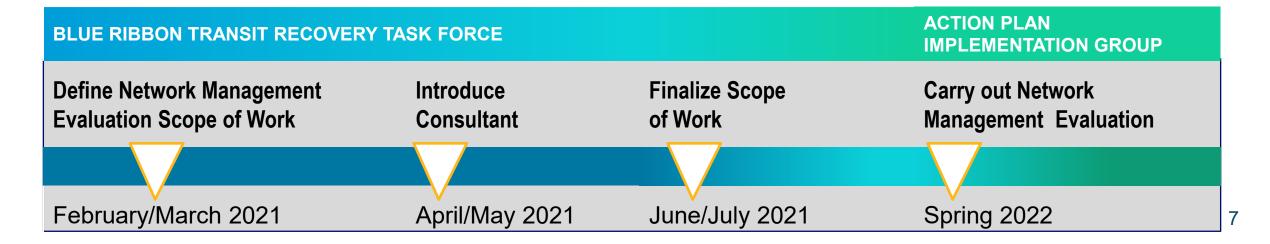
MTC, Operator Staff, Consultants, Working Group

- Prepare business case data analysis
- Track Chiu legislation

#### **JULY 2021 - SPRING 2022**

MTC, Operator Staff, Consultants, Working Group

- Implement Action Plan's yearone Network Management priorities
- Proceed with the Network Management Evaluation





## NETWORK MANAGEMENT BRAINSTORM: POTENTIAL ROLES/ RESPONSIBILITIES



(From January 25, 2021 Meeting)

## **Customer Facing**

- Fare Policy and Collection
- Network Planning and Coordination
- Service Coordination
- Branding and Wayfinding
- Station Hub Design Review
- Technology and Mobile Standards
- Marketing/ Public Information Services
- Paratransit Coordination
- Advance Bus Transit Priority
- Micro-mobility Integration

### **Administrative/Institutional**

- Procurement and Contracting
- Capital Project Prioritization
- Mega-project Delivery and Oversight
- Emergency Coordination
- Data Collection and Coordination
- Program Eligibility Verifier
- Performance Management
- Financial Assessment and Advocacy

# CONCURRENT EFFORTS UNDERWAY – TRANSIT COORDINATION FOCUSED

### **QUESTION:**

Does the Task Force need additional information to define how these initiatives are addressed in the Action Plan?

Concurrent Initiative/ Identify Priority	Possible Linkages for Task Force:	
Fare Coordination and Integration Study	<ul> <li>Act on Study – summer 2021</li> <li>Potential Action Plan near-term implementation priority</li> </ul>	
Regional Mapping and Wayfinding	<ul> <li>Refined program – spring 2021</li> <li>Program implementation – summer 2021</li> <li>Potential Action Plan near-term implementation priority</li> </ul>	
Advancing Transit Priority/ Reliability and Forward Projects	<ul> <li>Identify priority locations</li> <li>Streamline approval process</li> <li>Fund shovel-ready projects</li> <li>Potential Action Plan near-term implementation priority</li> </ul>	
Caltrans Partnership Grant — Rail Coordination	<ul> <li>Address governance evaluation and megaproject delivery and oversight</li> <li>Potential Action Plan mid-term implementation priority</li> </ul>	

# ORGANIZING ROLES & RESPONSIBILITIES BY PRIORITY



(Assignments for discussion purposes only)

### BRTF Highest Priority Within 1 year

- Implement Adopted Fare Coordination Study
- Return to Transit Campaign set in motion
- Expedited approval process for Bus Transit Priority
- Wayfinding Program refined/ Pilot projects started

# BRTF Near Term Priorities Within 1 - 3 years

- Network Connectivity Plan adopted (incl. transfers, hubs)
- Network Management reforms implemented
- Unified Real-time Travel information available
- Smaller Agency Management re-structuring complete

# MTC-led Collaboration

#### Within 1 - 3 years

- Ensure Service Coordination
- Update performance standards
- Strengthen the Paratransit Program
- Prioritize Capital Projects
- Rail Grant evaluation complete

# Operator's Voluntary Collaboration

# Operator's Voluntary Collaboration

- Service Coordination
- Continue Paratransit
   Coordination
- Procurement and contracting
- Data Collection and Coordination
- Unify Emergency Coordination





#### Legislation Details (With Text)

File #: 21-0330 Version: 1 Name:

Type: Report Status: Informational

File created: 2/3/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Network Management Evaluation Consultant Update

Sponsors:

Indexes:

Code sections:

Attachments:

Date Ver. Action By Action Result

#### Subject:

Network Management Evaluation Consultant Update

#### Presenter:

MTC Staff

#### **Recommended Action:**

Information

#### Attachments:



#### Legislation Details (With Text)

File #: 21-0328 Version: 1 Name:

Type: Report Status: Informational

File created: 2/3/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Network Management Roles & Responsibilities

Sponsors:

Indexes:

Code sections:

Attachments:

Date Ver. Action By Action Result

#### Subject:

Network Management Roles & Responsibilities

#### Presenter:

Ad Hoc Working Group and Steve Kinsey, CivicKnit

#### **Recommended Action:**

Information

#### Attachments:



#### Legislation Details (With Text)

File #: 21-0274 Version: 1 Name:

Type: Report Status: Informational

File created: 1/28/2021 In control: Blue Ribbon Transit Recovery Task Force

On agenda: 2/22/2021 Final action:

Title: Other Business Handouts

Sponsors:

Indexes:

Code sections:

Attachments: Operator Financial Update

Outreach and Engagement Update

**Transit Operator Board Presentations Summarized** 

Date Ver. Action By Action Result

Subject:

Other Business Handouts

**Attachments:** 



TO: Blue Ribbon Transit Recovery Task Force DATE: February 22, 2021

FR: MTC Staff

RE: Operator Financial and Service Status Update

Attached is a Transit Operator Financial and Service Status Update for your reference. This report will be presented to the Metropolitan Transportation Commission on February 24, 2021.

February 24, 2021

Agenda Item 11e - 21-0180

#### **Bay Area Transit Operator Financial and Service Update**

Subject: Staff will present an overview of Bay Area transit operator financial and

service status.

**Background:** The COVID-19 pandemic that began in March of 2020 and continues

today, has had a tremendous impact on transit operator finances and

service levels.

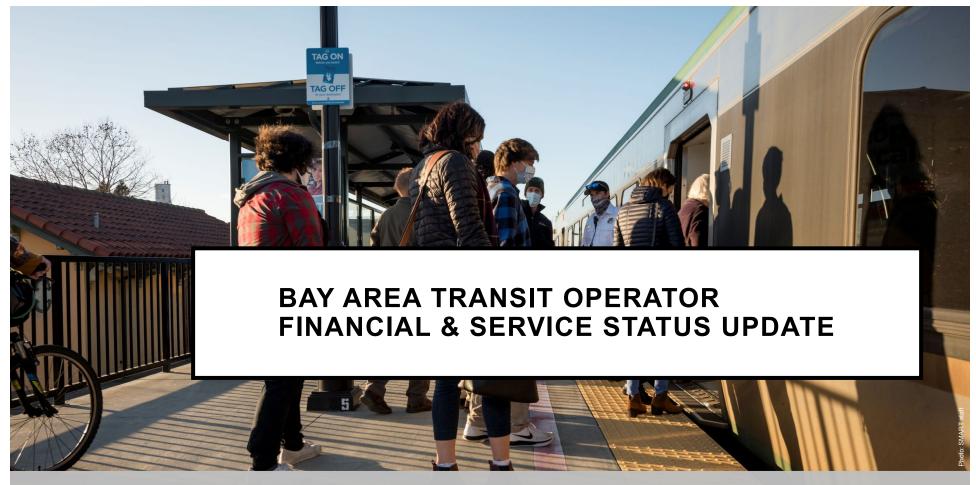
The attached presentation provides information on operator ridership, service provision, revenue losses, and expense adjustments since the onset of the pandemic. The presentation will also touch on operators' ability to respond to increased demand once riders begin to return to public transit.

**Issues:** None

**Recommendation:** Information

**Attachments:** Presentation Slides

Therese W. McMillan



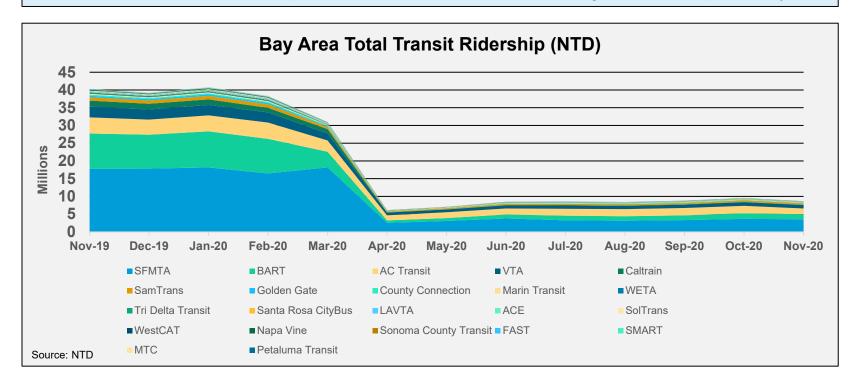


February 24, 2021 Agenda Item 11e

### TRANSIT RIDERSHIP

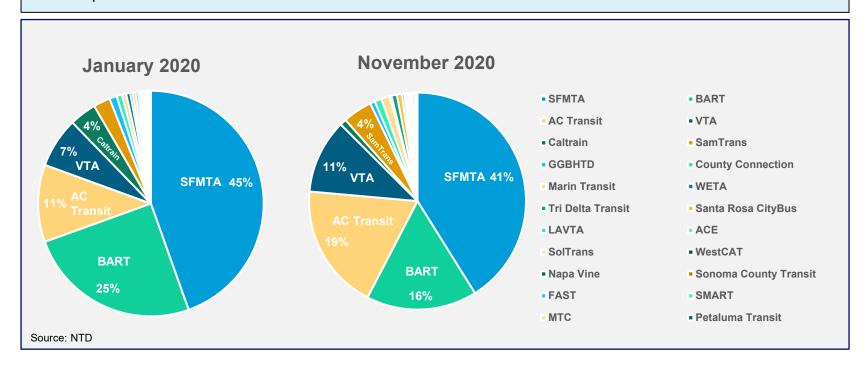
Bay Area ridership has declined 80%, comparing April-November 2020 to the same period in 2019.

The sharpest declines are among operators that disproportionately carried peak hour commuters prepandemic such as BART, Caltrain, Golden Gate, and WETA. Small bus operators that served, and continue to serve, more transit-dependent riders have seen a somewhat greater ridership recovery.



### RIDERSHIP BY OPERATOR

Ridership patterns by operator have shifted since the pandemic. AC Transit is currently carrying more passengers than BART. Ridership on VTA has also increased from 7 to 11% of regional ridership



### STUDENT RIDERSHIP

Student transit users comprise a significant percentage of ridership for some operators. This creates a "ceiling" on ridership recovery until in-person education resumes.

## 8.1 million

trips per month

Average number of trips taken by students (K-12, postsecondary) each month in the Bay Area, pre-COVID-19. 100+

# School only/supplemental routes

Number of special student targeted services operated Bay Area-wide pre-COVID-19.

15%

of riders

Bay Area-wide share of pre-COVID-19 ridership that were (K-12, post-secondary) students.

The share varies by operator, with some operators' ridership consisting of 40% students.

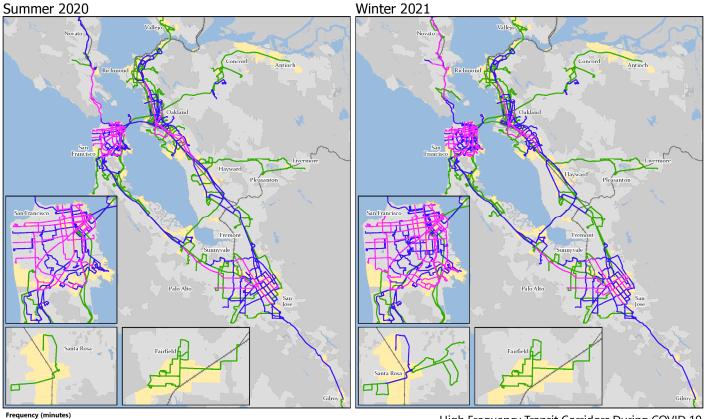
Source: Operator data, passenger surveys

# Operators with approx. 20%+ student ridership:

- SFMTA
- AC Transit
- VTA
- Marin Transit
- Union City Transit
- Petaluma Transit
- LAVTA
- WestCAT
- Santa Rosa CityBus
- SamTrans

### **SERVICE FREQUENCY CHANGES**

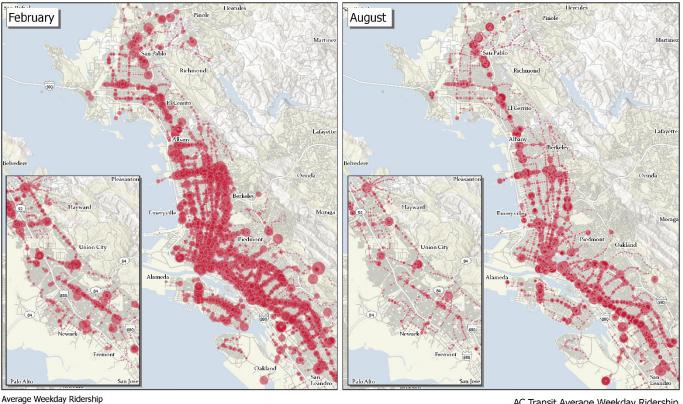
– 10 min. or better 💮 11 to 20 min. 🥌 21 to 30 min. 🔝 Community of Concern (MTC) 💛 SMART/ACE/Capitol Corridor



Almost all operators increased frequency on some corridors or routes since the summer of 2020 to improve service in core areas and to support local trips.

This is most pronounced for SFMTA, which reinstated some routes that were previously suspended.

#### CHANGES IN WHERE THE SYSTEM IS BEING USED - AC TRANSIT



≤10 ≤100 ≤1,000 ≤2,200

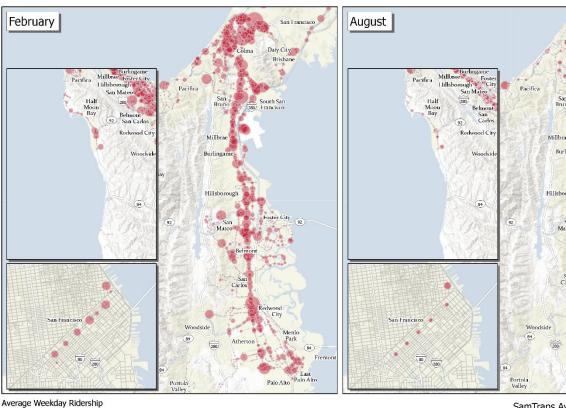
Overall AC Transit ridership decreased by 56% between February and August 2020.

The impacts vary geographically, with greater ridership retainment in certain communities of Richmond, San Pablo and East Oakland.

AC Transit Average Weekday Ridership 2020, Pre- and Post- Pandemic

Data provided by AC Transit, Map produced by SamTrans Planning for MTC, 2021

#### CHANGES IN WHERE THE SYSTEM IS BEING USED - SAMTRANS



SamTrans Route

≤10 ≤100 ≤1,000 ≤2,000

San Francisco

Colma Daly City
Brishane

South San
Jago Francisco

San Francisco

San Francisco

Foster
City
San Mateo

Rectwoord
City

Menlo
Park
Fremont
Last

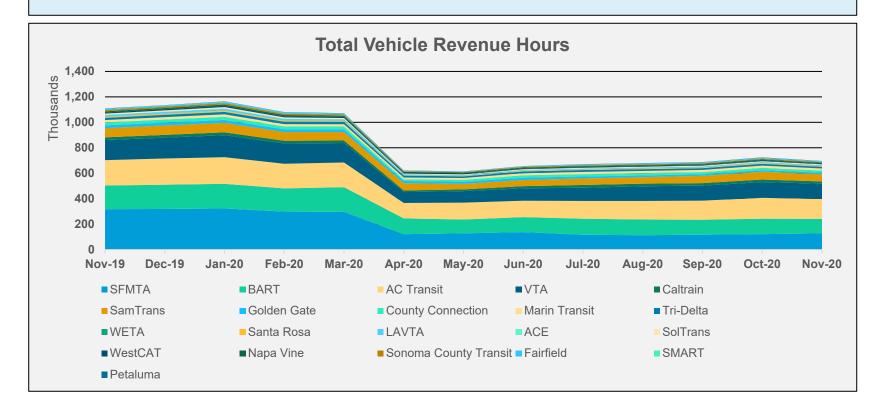
Overall SamTrans ridership decreased by 63% between February and August 2020.

Similar to the geographic variance shown in the AC Transit map, ridership retainment was greater along El Camino Real and in Daly City.

SamTrans Average Weekday Ridership 2020, Pre- and Post- Pandemic

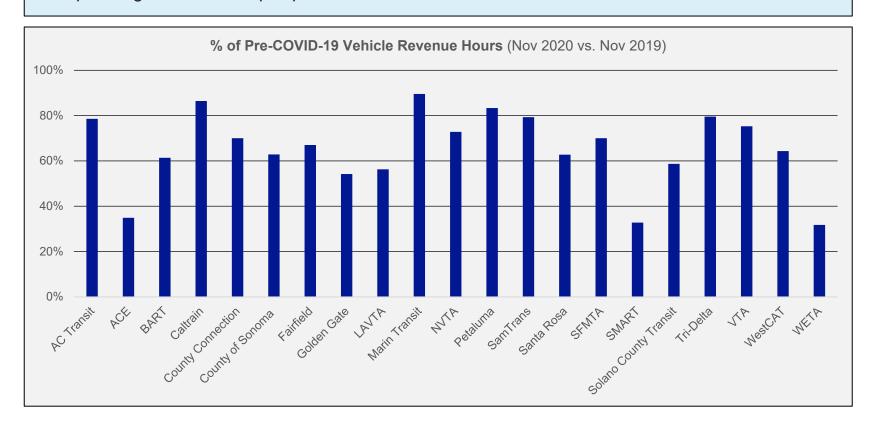
### **TOTAL VEHICLE REVENUE HOURS**

Bay Area-wide, service operated has **decreased by 40% compared to pre-pandemic levels** as measured by total vehicle revenue hours, however the decrease varies dramatically by operator.



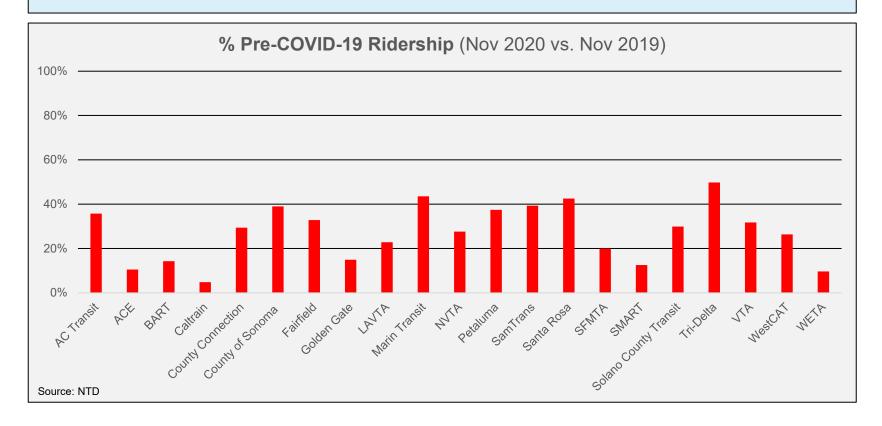
### **TOTAL VEHICLE REVENUE HOURS**

As a % of pre-COVID-19 service levels, service varies dramatically across operators. While some are operating at 80-90% of pre-pandemic levels, others are at around 30%.



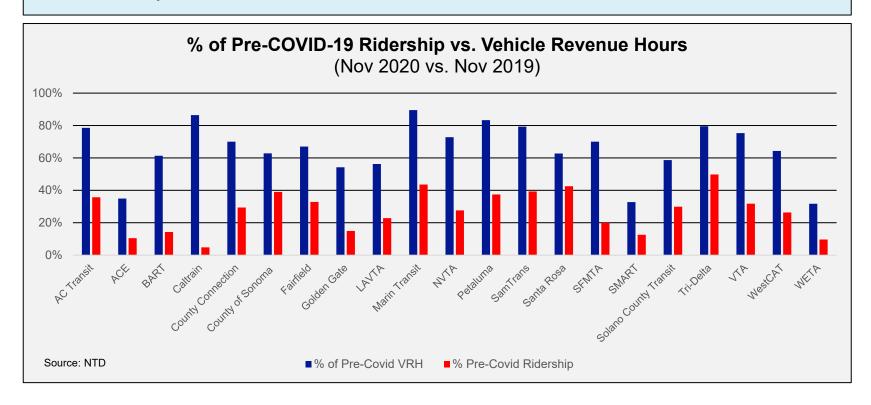
### **TOTAL RIDERSHIP**

Region-wide, ridership in November 2020 was 20% of ridership in November 2019. Across operators, this figure ranges from 5% to 50% of pre-pandemic levels.



### **VEHICLE REVENUE HOURS & RIDERSHIP**

Region-wide, operators are serving 20% of pre-COVID ridership with 60% of pre-COVID service, as measured by total vehicle revenue hours.



#### PASSENGER "PASS UPS"

Capacity on transit vehicles has been reduced to adhere to social distancing policies. This has created a challenge for many operators, and a situation where some passengers are "passed up" on vehicles are already at their reduced capacities.

## 2,000

passengers per day

Approximate number of passengers being "passed up"

Agency data on pass ups are inconsistent, given challenges of quantifying it.

- SFMTA has reported up to 800 pass-ups per day in the fall.
- VTA has reported an average of over 500 pass-ups per day
- AC Transit has reported overcrowding on 12% of its trips

#### Why pass ups occur:

- Reduced capacity to manage social distancing
  - Buses, on average, now operate at 20% of capacity
  - A bus that would normally serve up to 100, is now limited to 24
- Reduced service to reflect lower ridership overall and uncertain resources

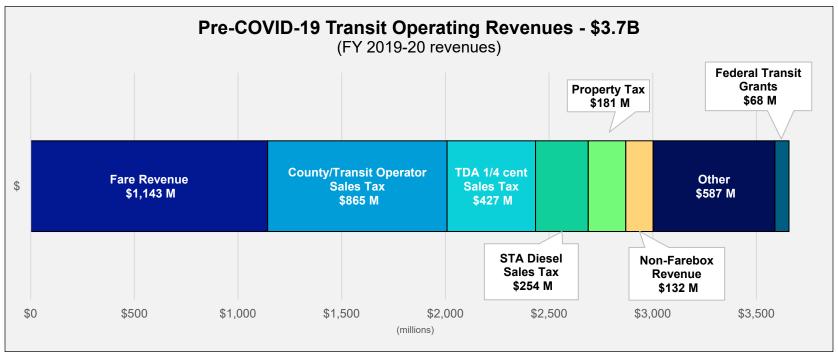
# What can we do to ensure every rider who needs a ride has access to one?

- Back up service has been deployed on many operators, targeting stations or areas with a high amount of pass ups
- Service levels have been increased in some places where demand has recovered

Source: Operator data

### **OPERATING REVENUE: PRE-COVID-19**

Pre-pandemic, Bay Area transit operations were funded with a diverse mix of sources, including fare revenue and various sales taxes.

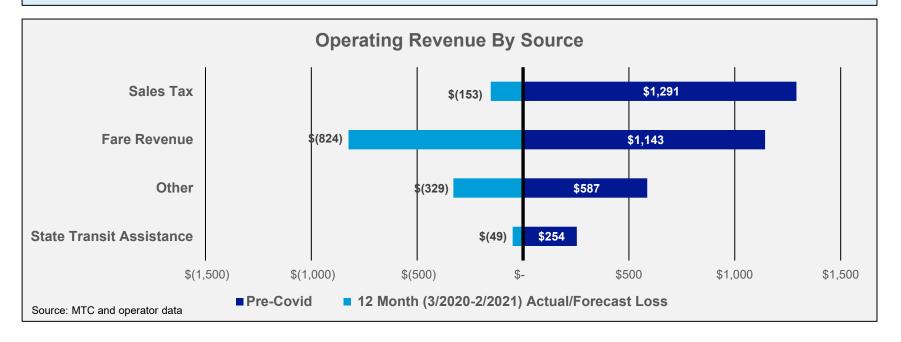


Source: Transportation Development Act Claims to MTC MTC Fund Estimate, State Budget

### **OPERATING REVENUE LOSS**

Transit agencies have lost over **\$1.1 Billion** in revenues between March and December 2020, at a rate of nearly \$110 million per month. Of the funding mix, fare revenues have been most severely impacted.

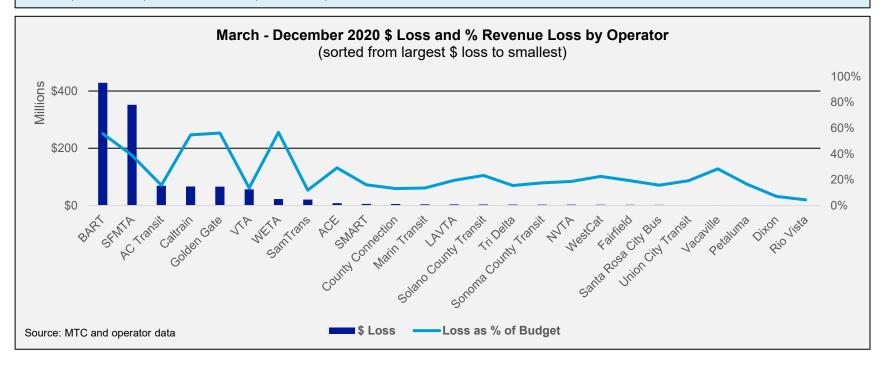
At this rate, the region would lose \$1.3 billion over a 12-month period, or over a third of prepandemic operating revenues.



### **OPERATING REVENUE LOSS**

Revenue impacts have varied greatly by operator. Revenue loss between March and December of 2020 as a % of FY 2018-19 budgets range from the single digits to 57%.

Impacts have been especially significant for fare, parking, and toll revenue-dependent operators, such as BART, Caltrain, Golden Gate, SFMTA, and WETA.



### TOTAL STAFFING IMPACTS

Service plan and revenue reductions have impacted staffing levels across operators. Across all operators, total staff levels (including directly employed and contract staff) have decreased by over 1,000 employees, or 6% of pre-Covid staffing.

Nearly all operators have implemented a hiring freeze or wage freeze as well as limits on overtime. Other efforts to manage staff levels include early retirement programs and shifting staff from operations to capital projects.



#### **Staffing Changes at Selected Operators**

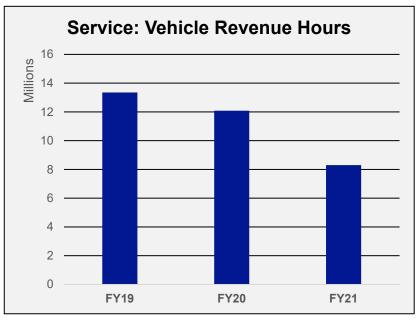
Operator	January 2020 Staff	January 2021 Staff	% Change
BART	5,087	4,384	-14%
AC Transit	2,137	2,059	-4%
VTA	2,122	2,076	-2%
Caltrain	521	471	-10%
LAVTA	148	118	-20%
SFMTA	4,569	4,702	+3%

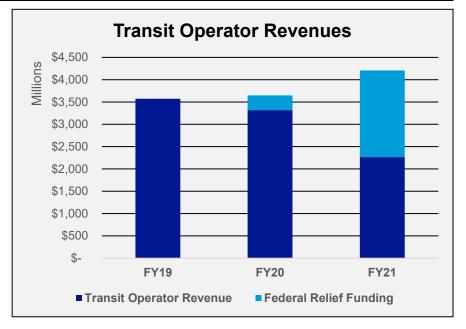
Source: Operator data

#### FINDING THE BALANCE: BUDGET CAUTION VS SERVICE

While Bay Area transit operators are projected to lose \$1.3 billion over the first 12 months of the pandemic, the federal government has already allocated **\$2.2 billion** in relief funding to the Bay Area.

Operators face a difficult choice in deciding when to increase service to meet current and future demand while not knowing what future revenue levels will look like.





Source: MTC and operator data

### **OUTLOOK TO RESTORE SERVICE**

Transit operators face important decisions over the next few months.

- How might the rate of vaccine roll out and community penetration affect transit demand?
- How will customers view the level of service as sufficient or reliable?
- · And how is this factored into budget decisions?

Many riders likely won't come back without sufficient service levels and confidence that transit will be there for them, creating a "chicken or the egg" problem.

#### 1 month - 9 months

Amount of lead time needed by operators to increase service

Lead time varies by agency based established processes to adjust service several times a year, along with collective bargaining agreements.

Requirements to make service changes vary between operators, and include:

- Planning and analysis
- Coordination with partner agencies
- Public outreach
- Formal public hearings
- Title VI analyses
- Board approval



Source: Operator data





TO: Blue Ribbon Task Force Members DATE: February 22, 2021

FR: Ursula Vogler, MTC Staff

RE: Blue Ribbon Engagement Update

Over the past few months, MTC and consultant staff (led by EMC Research) have been working on transit rider and employer/schools research in order to determine the barriers and motivators for transit ridership, both pre-pandemic and currently. This work will be the foundation for creating communications aimed at restoring the lost transit ridership due to the Covid pandemic (Return-to-Transit Project) and will also assist in the transit network management effort. Below are the latest results of the research, along with near-term plans for future work.

#### **Focus Group Results**

Last month for the Return-to-Transit effort, MTC's consultant team conducted eleven focus groups with transit riders and employers/schools to understand transit riding during the pandemic. Specifically, they held:

- 1. Six online focus groups with transit riders, which included:
  - a. Two groups with current riders who are transit dependent (including one group in Spanish)
  - b. Two groups with potential future transit dependent riders
  - c. Two groups with potential future transit choice riders
- 2. Five focus groups with employers and schools, which included:
  - a. 20 employers with 1-50 Bay Area employees
  - b. 10 employers with 50-100 Bay Area employees
  - c. 10 employers with 100-1,000 Bay Area employees
  - d. 10 employers with 1,000-10,000 Bay Area employees
  - e. 10 employers with more than 10,000 Bay Area employees

Within these groups, the following were represented:

- a. 10 government employers
- b. Two employers from each of the top ten industry sectors in the Bay Area
- c. 10 post high-school, higher education institutions
- d. Employers that span all nine-counties of the Bay Area

Results from these focus groups are outlined in Attachment A. The focus group results will feed into the public poll and employer/schools survey that are scheduled to be conducted in March or April. The survey results are scheduled to be presented to the Blue Ribbon Task Force this spring.



#### **Future Research and Engagement Work**

In addition to the Return to Transit work, MTC staff, along with EMC Research, will begin working conducting research and engagement that will provide input on the Blue Ribbon network management effort. This will include compiling input from transit riders on challenges they experience with transit, both pre-pandemic and currently, with a special focus on riders who are transit dependent. This includes:

#### 1. Comprehensive Research Review (February 2021)

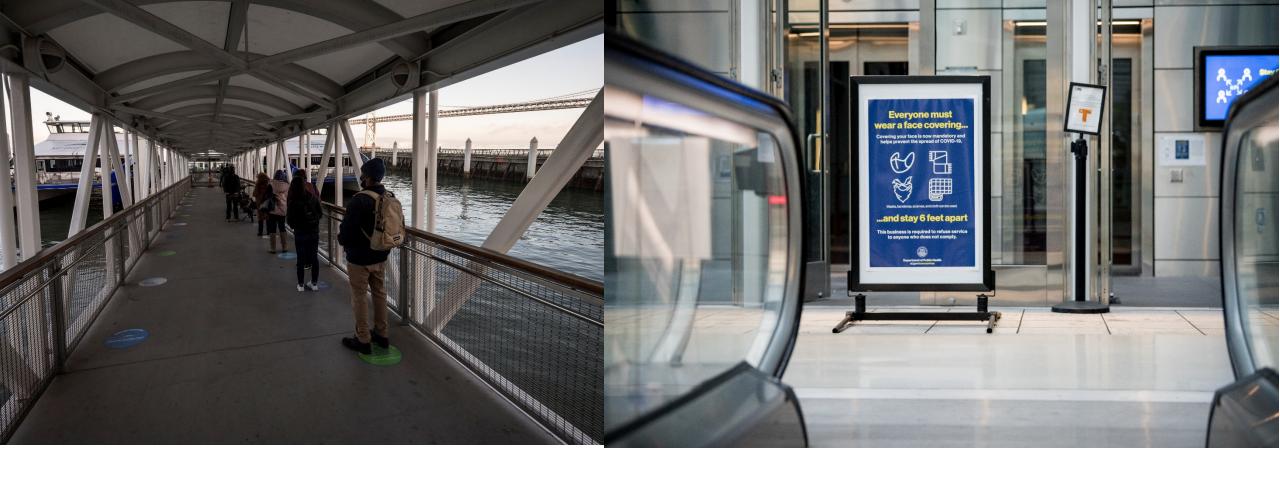
Because a large volume of research on Bay Area transit currently exists, EMC Research will conduct a research review to compile information on transit challenges. Existing research efforts include: Plan Bay Area 2050 poll and online surveys, transit fare coordination/integration study focus groups, Clipper customer service surveys, transit mapping focus groups, along with work done by County Transportation Agencies (CTA) and transit operators. We will compare the results of the research review with the Blue Ribbon's adopted Problem Statement and the initial work on the network management's opportunity areas in order to confirm which topic areas could benefit from further coordination and identify where additional public input is needed.

#### 2. CBO discussion groups with transit dependent riders (March or April 2021)

In order to ensure we hear from transit dependent riders about the topics not addressed in the research review and to confirm their top priorities, we will hold four community-based discussion groups aimed at reaching the following:

- Transit dependent riders, English speakers
- Transit dependent riders, Spanish speakers
- Persons with disabilities
- CBO leaders/staff

The information heard from the discussion groups' participants, along with the results of the research review, will provide comprehensive input on the issues faced by transit riders. This information will be used to inform the transit network management process as well as the evaluation criteria of the proposed network management structure.







# MTC Return to Transit Research Program Update

Qualitative Research Draft Report February 2021

# Research Program Overview





Two-step research program to understand attitudes about riding transit during the pandemic, and returning to transit going forward

Qualitative focus groups (conducted in late January 2021)



Quantitative survey research (currently in planning stages)

- Last month, we conducted a total of eleven focus groups:
  - Six with transit dependent and transit choice riders (one in Spanish), conducted by EMC Research
  - Five with employers and schools conducted by Bay Area Council

# Research Progress Update





The focus group research is beginning to validate some assumptions

\*\*Note that the focus groups were conducted in late January, as COVID vaccines were beginning to roll out; this environment likely impacts how people think and talk about transit riding and planning for an uncertain future

Current riders continue to need safe, reliable transit service

The pandemic may be accelerating a shift toward more frequent remote work

The vaccine is seen as the key to returning to normal activities, including transit

In-person school is needed for businesses to begin executing reopening plans

## Focus Group Finding: Current riders continue to need safe, reliable transit service



- Current riders continue to ride because they do not have other options
- Transit dependent populations are feeling the impact of service cuts and worried about permanently reduced service
- Being responsible for your own personal safety is just part of being a transit rider in the Bay Area, and has been since before the pandemic
- Confidence in environmental safety or the responsible actions of fellow transit riders is low

"Public transportation is a need. We can't all drive. We can't all work from home. It's just impossible. There just has to be public transportation." -Transit rider focus group participant

"I'll still ride, because I need to get my medicine and I can't afford Uber." -Transit rider focus group participant

## Focus Group Finding: The pandemic may be accelerating a shift toward more frequent remote work





- Urgency to return to shuttered workplaces is low, from both employers and the public; for those engaged in it, remote work is largely working
- Employers are sensitive to employee concerns around COVID safety and caregiving obligations
- Returning to in-person workplaces is likely to be gradual, and many do not anticipate commuting as frequently
- There is little evidence of long-term transit hesitancy

"Working remotely has really worked well for me. I imagine that there will be some sort of hybrid where I would need to go back and be in person. But I don't imagine that it would be every day. I think it would probably be like twice a week or maybe three times." -Transit rider focus group participant

"We're basically waiting for the public sentiment to shift in the global sense of optimism." – Employer focus group participant

# Focus Group Finding: The vaccine is seen as the key to returning to normal activities, including transit





- Many see widespread vaccination as the thing that enables a safe public health environment, where normal activities can resume without fear
- Employers are deferring to their perceptions of the concerns of their employees, and do not want to risk damaging their culture with discussion on returning to workplaces before employees feel ready
- When public health conditions allow for large gatherings to resume, that will signal that transit riding is adequately safe

"I think that people will go back to transit after they have their vaccinations. I think that will be huge. All of a sudden from being not safe at all, you'll have at least 90% or 95% safety from getting COVID. People will be more careful, but I think everyone will go back to it." -Transit rider focus group participant

"It's not an issue of the CDC guidelines. To a large degree, it's an employee retention issue of making sure that people feel that we're not pushing them back into the offices."

- Employer focus group participant

# Focus Group Finding: In-person school is needed for businesses to begin executing reopening plans





- The re-establishment of consistent, stable in-person school will play a critical role in workplace reopening plans
- Many businesses are hesitant to commit to any plans while the school situation remains fluid
- Local control of school decisions makes anticipating timing challenging for local communities and workplaces, and everyone is not in the same phase

"Part of this is if the school age children don't go back [to school], I have a lot of staff who are homeschooling and have children at home... it's a system interactive effect. It's not just we decide and it happens." - Employer focus group participant

# **Next Steps**





- Quantitative research with Bay Area residents (including transit dependent), employers, and schools
- Continue to build communication network connecting employers and schools with transit operators

# **Blue Ribbon Transit Recovery Task Force**

Presentations/Listening Sessions for Transit Operator Board Members and General Managers Small Transit Operators (1/28/21) and Large Transit Operators (2/1/21)

# High-Level/Common Themes across both meetings:

- **Network Manager:** Both large and small transit operator board members and general managers expressed concerns about a Network Manager, and the possibility that by trying to solve one problem we will create others.
- **State of Transit:** Operators expressed a general sentiment that transit was performing well prepandemic and operators have only increased inter-agency coordination since COVID shelter-in-place. They feel there is a lack of recognition of this and other transit successes.
- **Goals**: Increased transit ridership, improved customer service and a better experience for riders are good goals. There is added value in making it easier for the rider to ride transit, making transit available to more people, offering a seamless experience for the user.
- **Equity**: Equity must remain in the forefront and transit operators must continue to serve transit-dependent riders.
- **Funding**: Across the board, partners and stakeholders are concerned about funding and the need for more/new/sustainable funds to support improvements.
- **Data**: Decision-making should be informed by data. Metrics to measure success should be included, and we should use a wider array of metrics than ridership numbers. Suggestions were made to review recent research and data collected for parallel efforts (fare integration, etc.) to help determine obstacles to transit ridership.
- Local Service: Small transit operators play an important role in adapting to and serving local needs, and local control allows this. Maintaining local service and local routes needs to be balanced with the advantages of central coordination.
- **Coordination**: There is agreement that coordinated schedules, and sufficient notice of schedule changes, improves service and supports seamless connections. More proactive coordination between large and small operators will benefit the system.
- **Governance:** The range of options and impacts need to be considered carefully. Accountability is important.
- **Timing**: Future remains very uncertain, and operators are focused now on recovery/survival and safety. The system is fragile right now.

# • Other Comments Captured:

- Interest in integrated public/private systems or other innovative solutions for last-mile services.
- Dedicated lanes on bridges and highways are something we should be working on.
- There should be a coordinated response to address homelessness and its impact on transit systems.
- This effort should consider not only current and past riders, but how to encourage future new riders.

# 1/28/21 – Comment Summary from Small Operator Board Members and General Managers meeting:

### **Transit Agency attendees:**

Stephen Adams, Union City Transit

Jessica Alba, WETA

Brian Albee, Sonoma County Transit

Liz Alessio, Napa Valley Transportation Authority

Charlie Anderson, WestCAT

Judy Arnold, Marin Transit

Teresa Barrett, Petaluma Transit

Carol Dutra-Vernaci, Union City Transit

Rachel Ede, Santa Rosa CityBus

Diane Feinstein, Fairfield-Suisun Transit

Ken Gray, ECCTA

Pat Gacoscos, Union City Transit

Jared Hall, Petaluma Transit

Daryl Halls, Solano Transportation Authority

Keith Haydon, CCCTA

Lynda Hopkins, Sonoma County Transportation Authority

Chris Kelley, WestCAT

Beth Kranda, SolTrans

Jeanne Krieg, Tri Delta Transit

Joan Malloy, Union City Transit

Farhad Mansourian, SMART

Norma Martinez-Rubin, WestCAT

Robert McConnell, SolTrans

Kate Miller, NVTA

Stacey Mortensen, ACE Rail

Monique Moyer, WETA

Seamus Murphy, WETA

Sue Noack, County Connection

Jaime Patino, Union City Transit

Rick Ramacier, CCCTA

Chris Rogers, Santa Rosa CityBus

Shanelle Scales-Preston, Tri Delta Transit

Michael Tree, LAVTA

Nancy Whelan, Marin Transit

Bob Woerner, LAVTA

**County Connection** – Noted that the number of transit operators can be is overwhelming. Streamlining that and fares is a good idea. But there is also a benefit of small operators. During this past year, County Connection adapted to local needs – serving Meals on Wheels, providing rides to seniors, etc.

**LAVTA** -- Agreed with goals of Task Force but questioned how to balance local needs with a desire to be centrally coordinated. Noted that 30% of LAVTA's service serves school routes. The "customer" isn't the same thing in each region. Most of the service now is local service, so how should we define the customer? Second point has to do with funding. How are you envisioning getting more funding? Is the

proposal to maintain funds that local areas are generating and add new funds, or are we going to have a zero-sum gain and reallocate?

**MTC Commissioner Papan** – My impression is that smaller agencies are more adaptable. I deal with the bigger agencies who for decades have not coordinated, and I think not assisted smaller agencies. If the bigger agencies were required to coordinate schedules, would that help smaller agencies?

**Union City Transit** -- With Union City Transit, we have flexibility. From a council standpoint, we have conversations about flexibility.

MTC Commissioner Pedroza -- We don't talk enough about what is working. Coming from Napa, our small operator adapted. A question to others in the meeting: What changes have been instituted that have brought back ridership?

**WestCAT** -- Appreciated learning about the Task Force. What we'd like to see included in future Task Force efforts and conversations is to keep in the forefront what the goals are for Task Force regarding equity and quality of service. Outcomes connote change, but to get there we must make assessments. What has been working well and what needs improvement? Are desired outcomes for individual riders or for regions? I want to speak for transit-dependent riders. Access mustn't be forgotten when we plan for a seamless system. Please highlight what are we talking about when we talk about access and advancing equity.

**Solano Transportation Authority** – When other operators such as BART or WETA make a schedule change, if there is consistency then it is easier to respond and have good connectivity. We engage with BART on how to better connect at the El Cerrito and Walnut Creek hubs, but more coordination would be better. We've also been piloting micro-transit for first/last mile and it is working. We have lots of localized programs. We need to come back more strategic, flexible.

**County Connection** – In our experience, BART has been very good to communicate with. When they change the schedules, we get advance notice to adjust our schedules. While there is always more that can be done, maybe we see different things in different areas. Our agency's history is tied to BART's. We provide bus bridges when Concord line is down. From my perspective, BART has been a great partner.

WETA -- Appreciates everything happening through the Task Force. The transparency and unity are remarkable. With regards to BART, coordination has been difficult but moving forward we know that Caltrain and BART are making efforts to coordinate schedules. A Transit Network Manager is a critical role that hopefully will come from this effort. Concerned about funding. What are the critical efforts and low-hanging fruit we can push forward first before we secure additional funding? All of this is happening in the environment of extreme uncertainty. Hopes that one recommendation of this Task Force is to extend the Clipper START pilot or make it a permanent program. As we talk about a Network Manager, we need opportunities to think about seamlessness across the system. We should take this time to turn Clipper 2.0 into Clipper 3.0, create a mobility-as-a-service platform, and make it an integrated public/private system. Excited about progress the Task Force has made in such a short and difficult time.

**WestCAT** – The Network Manager idea could be beneficial if it comes with funding, but we are concerned about local routes. As a small agency, we can be nimble. We operate efficiently and have a high farebox return for a small agency, don't want to lose that in the process. We have different kinds of riders: students, essential workers, college students, and workers going to SF on a one-seat ride. Lastly, in Contra Costa county, TriDelta, County Connection and WestCat work together well all the time.

**Denis Mulligan, GGBHTD, Blue Ribbon Member** -- As a large operator, I would like to give a shout-out to small operators. We've been coordinating for decades in North Bay. Connections are seamless. Small operators are vital. I don't want changes we look at to harm our small agency partners.

lan Griffiths, Seamless Bay Area, Blue Ribbon Member -- Thank you to MTC for holding this meeting and engaging with operators and boards. We've done research on models for Network Management around the world to understand best practices for growing ridership. We shared some findings at an earlier Task Force meeting. These models range from one Network Manager and lots of operators that are seamless to customer. In other models, there is only one operator. These managed systems can be associated with high ridership and excellent customer service and high levels or local service. Maintaining local service is not at odds with network management – I see them as complimentary, but they need to be coordinated.

**WETA** -- This effort should be focused on making it possible for more people to take public transit in the Bay Area. This effort should be about making it possible for more people to choose transit rather than get in their car. Of course, we want to ensure that local trips and essential trips remain possible or are even more possible.

**Santa Rosa CityBus** -- There has been a lot of coordination between North Bay operators. We could use resources to boomerang our coordination and keep it going after the pandemic. We could use resources to help us show what is possible.

**LAVTA** – We should think about how to make transit more available to more people. We have a long way to go. In addition to the number of riders, when will you be putting out metrics that define how/if this is working? Have these metrics been articulated yet?

**Santa Rosa CityBus** -- We are approaching this from user standpoint, and working on better co-branding and co-marketing, better wayfinding. Looking at it from perspective of even if operations are not consolidated, the experience is seamless for the user. Main metric we've been using is on the return trip ridership.

**County Connection** -- 80-85% of County Connection's riders stay in our region, and we want to meet their needs. When ridership dropped during COVID, we repurposed our fleet for Meals on Wheels and other needs. When people do leave the region, they view the Bay Area as connected. We support that overall concept, but our primary focus is our local ridership. That is also our source of funding. The balance is the challenge.

**John Ford, Commute.org, Blue Ribbon Member** -- Next step in the transportation ecosystem is public/private partnerships that provide shuttles and connectivity to local service and wider region. It is important that we include them in coordinating efforts.

**WestCAT** -- Responding regarding metrics, suggested that we don't use just one metric. When we talk about efficiency, we get to the cost of things. What those things are must be part of the discussion. Let's not leave it to a single metric of increased ridership. It is essential that the Task Force recognize there are different means of weighing things and, prior to that, measuring them.

**MTC Commissioner Papan**: Regarding coordination and connectivity, we have new and existing stations, some in our area are being deconstructed, what is going on elsewhere?

**County Connection** – County Connection has a good relationship with BART, but this is interesting and a thorny issue. We are constantly trying to educate our public on how to use the two systems effectively. There are resource issues between how many BART trains there are and how many buses. We can't serve every train with a bus. The Contra Costa Transportation Authority are innovating solutions for first and last miles. We must keep working on it as we move the technology along.

**Solano Transportation Authority** -- Our partnership is strong with Capitol Corridor. We also have a strong relationship with WETA. SolTrans, Napa Vine and WETA are working together on a coordinated plan. Perhaps we all need to be more proactive with BART.

**LAVTA** -- LAVTA coordinates a lot with BART -- 80% of LAVTA bus routes end at a BART station. I am hearing that it is important for local agencies to retain local control. Pre-COVID, we had 10% ridership increases each month, thanks to local board working with communities.

**Chair Spering** -- Thank you all for joining us tonight. We on the Task Force want to come up with recommendations we feel we can accomplish. Change is needed and we need to do what we can. We are not seeking to eliminate small operators, that is not the case. Working together, we can make this a much better transit system.

**Therese McMillan, MTC** -- Grateful for the time you've given. The topline takeaways: COVID for all the trauma it has provided has thrown a spotlight on small operators' ability to be service innovators and support equity. As we come back, our transit-dependent population can't be left behind. I heard that you appreciate the idea that we need a better transit system for the region, but there are many layers to that system. Your insights were thoughtful, thank you.

# Public comment --

David Pilpel – Recently sent two short letters to MTC about transit coordination, suggesting looking at this by area and mode. I support having fewer than 27 but more than 1 agency – provided examples. As to modes, how many ferry operators does the region need. As to rail, ask ACE, Caltrain, Capitol Corridor etc. what would help them? Joint Powers agreements and MOUs are great tools. Also it would be great if staff could summarize tonight's discussion points to post on the web.

• Roland Lebrun – I'm still confused what problem we are seeking to solve. As an outsider, it seems to be that the obvious network manager would be BART.

# 2/1/21 – Comment Summary from Large Operator Board Members and General Managers meeting:

#### **Transit Agency attendees:**

Gwyneth Borden, SFMTA
Dev Davis, Caltrain
Amanda Eaken, SFMTA
Mark Foley, BART
Carol Groom, SamTrans
Chappie Jones, VTA
Elsa Ortiz, AC Transit
Barbara Pahre, GGBHTD
David Pine, Caltrain/Samtrans
Rebecca Saltzman, BART
Charles Stone, Caltrain

**AC Transit** - Appreciated being invited to join the working group. Acknowledged frustration by GMs for lack of recognition for what we are doing, how many of our trips are local, transit dependent, we recognize there's an opportunity, but we encourage a link to funding to pay for these improvements. Appreciates the diversity of the group – labor and community stakeholders, but we are very much in recovery and having to leave riders at the stop due to social distancing requirements.

**BART** - Acknowledged Chair Spering and said he was well chosen to head up this effort. Acknowledged Steve Kinsey and his difficult task to round up all these different points of view. Noted operators have been working very closely together since onset of pandemic. We have stepped up our coordination even though there are always ways to improve. But we can build on this. The background work has been done, now the discussions are really going to be timely as we get into everybody's budget season. We need to keep that in mind as we go forward.

Caltrain—It's not fair to say that the effects of COVID on transportation are permanent — there is so much unknown. MTC doesn't have customers. If anything, we are your customers. To the extent that this conversation is one about wresting local control from us you should be cautious. We know what we are talking about. Many of the GMs are already working on equity, but we are hearing that those efforts aren't being recognized. Unfunded mandates are anathema to good government. Hope that any recommendations come with a funding source. We should be careful that we don't eliminate the nimbleness that local operators have. Caltrain and Samtrans got tired of waiting for Clipper2.0 so rather than wait we formed mobile apps that enabled our riders to purchase fares more quickly. If what I'm hearing is accurate, the world that you envision would not have allowed us to do that. It's interesting that you seem to already have the framework for a solution but only have a draft problem statement. Chair Spering — noted the solution has not been determined yet. The idea that the system doesn't need improvement is a mistake, but we're not going to make changes without the large operators' cooperation. We have a legislator that wants to do something about it. Hopefully, everyone on this meeting will help us formulate the solution.

**SFMTA** –Associated their comments with Caltrain. Being able to operate effectively as an agency is something about which we are concerned. People just want us to perform well. They don't have the patience for massive organizational change. What they care about is how much time that trip takes. How can we help with the connectivity of our schedules so that people want to make the trip again? Dedicated lanes on bridges and highways are the types of things we should be working on rather than getting bogged down on governance issues. The GMs are already working collaboratively, and we can focus on lining up union schedules for greater connectivity. Make it easier for the rider to ride transit – it doesn't matter the brand. Very supportive generally of the idea of a network manager and how we can work together.

AC Transit – Noted SFMTA and Caltrain raised valid issues. The concept of a network manager is good, but devil in the details. On issue of governance, it hasn't been explained. We are a special district and an elected board. Does that mean the governance will be removed from the board and they [the network manager] will make policy decisions? For example, fares are a decision that an elected board makes. Funding – how is reimbursement going to be made? How would local measures work, such as the Measure BB in Alameda County that provides specific funding for programs? Each of these agencies have their own labor contracts. How will those be negotiated? Someone mentioned that you are following European style, but in Europe, benefits are provided by the government, not the labor contracts. In those contracts, there are issues like where do the drivers go? For example, most of AC transit riders travel within a 4-mile radius. How will a seamless system benefit our riders? It will be helpful to hear these details and whether they will be provided in the legislation.

BART—The BART board is supportive of the concept - we were the first agency to unanimously support the seamless principles. We have a committee between BART and AC Transit that's been going for about 7 years. Happy to see this moving forward at the regional level. The question is how it's done and ensuring that trying to solve one problem, we don't create another. We can make everything sync up and the fares the same but if that means operators must reduce service it all falls apart. We must have a funding backstop, so we aren't fighting each other. This is especially important over the next several years because at BART at least we don't think we'll return to normal for many years. These are the things about which we must think. Another board member mentioned labor contracts. We can't break those. Our union partners — they have done so much in the pandemic working so closely and been such willing partners. One other consideration is whether the network manager is MTC or thru MTC — we have a problem with accountability — no seat on MTC due to having a directly-elected board, like BART. This is something that's very important that there is representation and that the operators' needs are being considered.

**Samtrans** – This is about local control. Local people take transit and know their board members. As we grow, I have concerns about a very large agency and how we get down to the person who buys their bus pass to get to work.

MTC Commissioner Alfredo Pedroza – Thanked Spering for arranging these listening sessions with the small and large operators and for all the operators you have done to collaborate. It's been good to hear this. This is not about dismantling what's working. COVID has provided us with an opportunity to listen. We have a commitment to do this with you, but also being willing to get a little bit uncomfortable to look for opportunities to make improvements. I ask that you stay engaged. This is intended to be done with you and not at you.

Caltrain – Wanted to echo the comments from earlier Caltrain representative. We all want to improve the usability of the system. When it comes to funding, I have a lot of questions. This doesn't feel like a fully formed idea. Where has it been done before? Anywhere in the U.S.? Where has it worked? How long did it take? I was many years ago an intern at Pierce Transit who was trying to coordinate with just two agencies for decades. Most of the people who take transit are just staying within their county. I just have more questions than I have opinions at this point. We have a lot more work to do to see what's been done elsewhere. I'd like to see a timeline, funding plan, and how we are going to keep the focus on the local transit rider as the bulk of transit riders are.

**BART**— We can't predict the future or control which employers will offer telecommuting. We don't know if many former riders may prefer to drive. The average worker is asking how can I change my life, do I need to commute the same way? How do we phase this in? The current issue is, is transit safe? Is it touchless? If we can't address those things, I don't think people return. Midterm, homelessness. MTC should be coordinating with all our agencies to address homelessness. The state has failed us. We ought to work together to come up with a solution that involves cities and counties. We need to provide rides that are perceived as safe. Coordinated scheduling is tremendously important. Lastly, long-term, seamless fares and sustainable funding is the big issue. How do we prevent these peaks and drops in ridership? On local control, I was elected by my constituents who may want no fares, but how do I balance that with the direction I might receive from a network manager?

MTC Commissioner Papan - Noted in response to concern about MTC not having customers, that it has constituents. Noted connectivity challenges at BART and Caltrain. We have a common goal – we want to get people back on transit by better coordination and working together to make it convenient for the riders. It is their quality of life when schedules don't match up. When they don't have access to the stations. Some of the great things the task force is doing is working with so many of you to make the system better than ever before. It is going to take a lot of work together. There's no established determination of "this is what the manager is going to do." That's something to be figured out in legislation. Some of us think legislation is needed to bring some agencies together. There are many different areas to work on.

James Lindsay, ATU, Blue Ribbon Member —What I've heard tonight is what I hear at the negotiating table; concerns about control and taking money away. I couldn't imagine this being any different. This is going to be a tough pass, a tough road to hoe, finding that fine line of local control and funding. I know the Assemblymember is going to have a hard time getting additional funding, so not sure where it will come from, federal funding a possibility but may not be long-term solution.

**Caltrain** - Nobody can say there hasn't been measured improvement in transit performance. Caltrain ridership growth pre-pandemic was strong. I would like to not hear words like dysfunctional so much, because 70% of voters thought transit was good enough to tax themselves for Caltrain. We can always do better but we've been doing pretty good in a lot of ways.

Randy Kinman, MTC Policy Advisory Council, Blue Ribbon Member — Nobody is calling any agency dysfunctional — but common long-standing pre-pandemic complaints from the public is that while they can get around on their local system there is no fare they can count on, no connectivity they can count on. We know you've been doing a good job and come together extremely quickly during the pandemic, but what we want to do now is to have a conversation about how to make the system work better at a consistent level across the Bay Area. Post-pandemic, we have to have a system in place. Your ridership shows most of your riders just use your system, but you aren't seeing the riders that don't use the

system because it's so difficult, not seamless and expensive. If we want everybody to operate better and maintain local control, what are those things that we can take back to the task force to work on?

**Caltrain** —One of the things we preach in our own agencies and regionally is importance of frequency, reliability and time. To the extent that we can work together on those, we are more successful. We try to be data driven. Some of the data derived from the fare integration task force has asked, what are the top obstacles to people riding transit? This will help inform the decisions about what is best to focus on to increase ridership. Is it on frequency, reliability and time overall, or connectivity? This will help guide decisions down the line.

**SFMTA** – I'm hearing a lot of acknowledgment of the problem and support for a high-level integrated system but it's no surprise that it gets more difficult as we talk about the solutions. What are the tradeoffs for each of these solutions? And how do we pay for this? We need to remember the larger context that we are in during this pandemic. Some of the solutions, such as fare integration are extremely expensive. Getting this right and really thinking about network integration will take a lot of staff time, at a time when staff are struggling to address other pandemic issues. Is this the right moment? I want to acknowledge all the amazing work of our staff already. It seems that the best path is to build on the work that is already being done by the operators with a more targeted approach that recognizes some of the nuances. Think of that coordination as the starting point.

**Caltrain** - wanted to echo the last point I've been thinking of how fragile the transit systems are right now. Making progress on these issues would be easier in normal times. This is a difficult environment to make change, not to say we shouldn't try but we must get new funding if we are to have these new requirements. The transit agencies are struggling to survive. That has to be their top priority.

MTC Commissioner Papan— Agreed coordination is the most important thing and probably the easiest thing that you've shown us you can do, and we hope that that continues. I don't see anyone hearing from the airports. Hopefully, they will come into the discussion.

Chair Spering—The highest priority is "recovery", and we are very concerned about funding. MTC is working on infrastructure projects to speed up buses. We want to protect jobs and ensure the agencies can protect their workforce. When I used the word dysfunctional, I wasn't referring to any particular agency. But we hear from riders that aren't notified about routes being discontinued. This is the beginning of a long process. We're not going to do this without the large operators cooperating and working together. I hope that we are looking at added value. Nobody is looking at taking over your system. But there are going to be future funding sources and the people that support these measures have made it clear that without change, don't count on their support. The cooperation of the GMs is a foundation we can build on that we haven't seen for some time. What is the infrastructure that can support and enhance what you do? Please continue to give us your feedback. Our goal is to help you recover your riders and to do it in an efficient way and if we can do that with a transit network manager, that's the goal.

**Therese McMillan, MTC** – Noted the observation about the importance of data to inform decision-making is extremely important. One of the very critical things is knowing who has come back? We need to dive deeper to find out where we are today and how that information can help us particularly is regarding our most vulnerable riders. Equity for those who most need our systems has got to be a front facing item. Thank you for your candor and I'm looking forward to working with my peers.

**Kinsey, MTC Consultant** – We are working closely with the GMs and operator staff to make sure we are clear that we have identified the problem. We want to make sure that the types of responsibilities are ones that will be useful in a network manager. As a task force, we are going to be relying on more discussion with all the task force members, we are going to be relying upon the wisdom of the task force and a consultant. We need to have a business case that demonstrates any approach is economically viable. In response to concern that this is the wrong time, as the chair has stated, this is also an opportunity.

**BART** – Let us know the best ways to engage in this. If there are going to be other opportunities like this, let us know, but if there are other mechanisms, please advise us.

**Chair Spering, MTC** - Noted we will likely need to have another meeting similar to this one as we develop the ideas.

#### Public comment -

- Adina Levin Friends of Caltrain and Transit Justice Coalition in San Mateo County noted having worked on Measure RR with grass roots coalition to get the tax measure passed, couldn't agree more with the concern about unfunded mandates. There needs to be funding for anything that costs money, but voters want a seamless system. Having planning in place for seamlessness will help win support for a future measure.
- Roland LeBrun Everyone agrees there is a problem, but nobody agrees on the solution and the
  "show me the money" question is well understood. As far as I can see, this is not the time to
  rock a bunch of leaky boats. Moving forward would be to start with the top of the food chain,
  BART, Caltrain, Capitol Corridor & ACE and make those work better with everyone else watching
  and then move forward. I strongly discourage you from forcing legislation.
- Rich Hedges this was a very good meeting. I'm so happy everyone put their issues on the table. I think one of the most important issues is wayfinding. I travel throughout the region. I'm blessed with convenient bus service on Samtrans that goes to Caltrain, but I have to carry 3 transit maps with me for the larger systems. For the person just starting to ride they are overwhelmed. A system manager can help rationalize the system.



# Metropolitan Transportation Commission

# Legislation Details (With Text)

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Attachments:











































February 17, 2021

The Honorable Jim Spering, Commissioner Metropolitan Transportation Commission Bay Area Metro Center 375 Beale St., Suite 800 San Francisco, CA 94105-2066

Dear Blue Ribbon Transit Recovery Task Force Chair Spering:

While we all continue to operate still very much in the throes of the effects of this devastating pandemic, recognizing the dire state of our collective finances, we continue to be optimistic that recent developments offer small glimmers of hope toward a recovery. One thing is certain: The landscape of public transportation will be forever changed. Our agencies are staying on top of this paradigm shift by remaining agile to new information and adapting to meet the needs of our customers and communities. One silver lining to this dark cloud is the collaboration and partnership of our agencies during this difficult time. This letter provides an update and information on several areas of interest to the Task Force.

# **COVID-19 Vaccination Access**

With COVID-19 vaccinations ramping up and the creation of mass-vaccination sites across the Bay Area, public transportation is playing a key role in getting people, especially disadvantaged communities, and the transit dependent, to these sites. A few ways we are helping to ensure the common goal of our state and counties to equitably distribute vaccines include:

- Two VTA light rail and three bus lines offering direct service to Levi's Stadium in Santa Clara, which opened as the state's largest mass-vaccination site on Feb. 9 with Gov. Newsom on hand.
- A coordinated launch of reduced and fare-free service by BART and AC Transit, as well as dedicated bus lines, which connect East Bay seniors, the disabled, and low-income residents directly from its hubs to the Oakland Coliseum, another life-saving mass-vaccination site that recently opened.
- SFMTA has worked closely with the San Francisco Department of Public Health to ensure access to all San Francisco vaccination sites. Dozens of SFMTA transit operators serving as Disaster Service Workers at two of the city's high-volume vaccination locations, with parking control officers also helping with traffic. They have also deployed a Muni bus to another testing site for use as a staff breakroom.

- The Golden Gate Bridge, Highway and Transportation District (Bridge District) offering Marin County the use of its Larkspur Ferry Terminal as a mass-vaccination site, to open Feb. 21. The site is well-served by rail, bus and ferry with SMART and Marin Transit connecting to the site, as well as the Bridge District's buses and ferries.
- A number of North Bay bus operators are planning to provide free rides to vaccination centers.

Obviously, the sooner more people are vaccinated, the sooner we can return to some semblance of normalcy and transit agencies are keenly focused on being part of the solution in reaching a post-pandemic society.

Providing better access to the vaccine is an example of public transit's agility and adaptability. It also shines a spotlight on why it is so important to continue our collaborative advocacy efforts centered around getting our frontline transit workers prioritized to receive the vaccine. Our essential workers are moving other essential workers, so we also continue to advocate for the health and safety of our riders.

Despite the original intent to have transit workers vaccinated early in the process, the CDC decision to prioritize vaccinations for age 65 and older has seriously delayed the opportunity for transit workers. The Bay Area Transit Operators collectively and individually wrote to the governor and local Public Health officials requesting priority for transit workers. Given the overall problems with vaccine availability, the number of people now eligible ahead of transit workers and the obvious need to have transit workers vaccinated, this is a major issue.

Without healthy Operators moving people to sites, pandemic recovery will take longer. We have made progress on the COVID testing front of transit employees, offering weekly on-site testing at operating divisions, for example. Internal surveys have shown that vaccine hesitancy is of critical concern to our frontline workers. Additionally, inaccurate information about the COVID-19 vaccine has spread widely and with reckless speed, leading to a refusal to vaccinate or delaying vaccination. As a result, Operators are developing employee-focused campaigns designed to dispel misinformation, and achieve a high level of buy-in, while making the public aware that proactive actions for a healthy workforce and safer ride are underway.

# **Return to Transit Public and Employer Research**

Another ongoing effort, spearheaded by our communications subcommittee, is the "Return to Transit" Qualitative Research effort with MTC and EMC Research. This effort will help us craft common communications to be used regionwide that we can use to encourage people to return to transit. Over the past several weeks, focus groups have been conducted in English and Spanish with transit-dependent current and potential future riders. These have provided valuable insight into some of the key issues that we will incorporate into a survey being developed for both the public and employers. Valuable survey data from surveys conducted previously by regional operators has also been gathered to help with this effort. Ultimately, we will craft adaptable messages for all to use and promote regionwide. A comprehensive findings report will be developed after the survey is launched. An update to this effort will be included as a brief consent item at the Feb. 22 Blue Ribbon Task Force meeting.

# **Improving Paratransit Service**

Recognizing the need to improve paratransit service for regional trips, BART and AC Transit worked with other operators to prepare and submit an application for a Caltrans planning grant. If funded, this work could start as early as 2022.

# **Draft Problem Statement**

Regarding the Draft Problem Statement as proposed at the January 2021 Blue Ribbon Transit Recovery Task Force meeting, Bay Area Transit Operators hope to ensure the statement represents an accurate assessment of the problem that will in turn set the stage to deliver solutions that will restore and increase ridership, enhance customer experience, foster equity, and create the financial means needed to advance meaningful improvements. We remain committed to employing practical solutions that will create a more integrated regional network while also preserving the critical services that so many Bay Area residents depend on. We look forward to the further discussion of this at the next meeting.

# Appointment of Acting VTA General Manager/CEO

During a special meeting on Jan. 22, VTA appointed General Counsel Evelynn Tran as its Acting General Manager/CEO in addition to maintaining her current role. Nuria Fernandez was appointed by President Biden to be Acting Administrator of the Federal Transit Administration. Evelynn has been with VTA for 14 years, serving the last two and a half years as VTA's chief legal advisor, providing counsel to VTA's 12-member appointed Board of Directors. She replaces Nuria as the representative for VTA on the Blue Ribbon Transit Recovery Task Force.

Sincerely,

Michael Hursh, General Manager Alameda-Contra Costa

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Transit District (AC Transit)

Rick Ramacier, General Manager County Connection

Robert Powers, General Manager San Francisco Bay Area Rapid Transit District

Rost M. Powers

(BART)

Diane Feinstein, Transportation Manager (FAST)

Fairfield and Suisun Transit

Jim Hartnett, General Manager/Executive Director San Mateo County Transit District (samTrans)/Caltrain

Denis Mulligan, General Manager

Golden Gate Bridge, Highway and Transportation District

Nancy Whelan,
General Manager
Marin Transit

Kate Miller, Executive Director Napa Valley Transportation Authority (NVTA) Jared Hall, Transit Manager Petaluma Transit

Rachel Ede, Deputy Director City of Santa Rosa Transportation and Public Works

Seamus Murphy, Executive Director Water Emergency Transportation Authority (SF Bay Ferry) Jeffrey Tumlin, General Manager San Francisco Municipal Transportation Agency (SFMTA)

Farhad Mansourian, General Manager Sonoma-Marin Area Rail Transit (SMART) Beth Kranda, Executive Director Solano County Transit (SolTrans) Bryah Albee, Transit Systems Manager Sonoma County Transit

Jeanne Krieg, Chief Executive Officer Tri Delta Transit

Evelyngra

Michael S. Tree, General Manager Livermore Amador Valley Transport Authority Joan Malloy, City Manager Union City Transit

far Malley

Evelynn Tran, General Counsel & Interim General Manager/CEO Santa Clara Valley Transportation Authority (VTA) Charles Anderson, General Manager Western Contra Costa Transit Authority (WestCAT)