



Memorandum

TO: Commissioners

DATE: October 23, 2019

FR: Executive Director

RE: MTC Resolution No. 3815, Revised – Proposal for Engagement and User Research on Fare Coordination/Integration Study

In response to the discussion at the October 9, 2019 Programming and Allocations Committee meeting and from public comments and correspondence, the Co-Project Managers (BART and MTC) of the Fare Coordination and Integration Study and Business Case have developed a proposed framework for policymaker and stakeholder engagement and clarified the user research approach. These proposals have the support of the project's Staff Working Group consisting of staff from agencies represented on the Fare Integration Task Force. MTC staff recommends formalizing these engagement approaches through the allocation requirements included in MTC Resolution No. 3815, Revised. The proposal and details are summarized below.

Policymaker Engagement

Policymaker Forum on Fare Coordination/Integration

Description: A convening of transit agency board members and MTC Commissioners at key points over course of the project (total of 3-4 meetings, or approximately quarterly assuming 12-18 month timeline) to receive status updates, provide feedback, and discuss the project. Meeting locations would rotate around the Bay Area (East Bay, San Francisco, and the Peninsula). The Policymaker Forum's role will be advisory; the Fare Integration Task Force will remain the governing body for the project.

Participants: Two (2) board members/MTC commissioners from each agency represented on the Fare Integration Task Force, selected by the Chair/President of each Task Force member's governing board.

Stakeholder Engagement

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration

Description: A new subcommittee of MTC's Policy Advisory Council which brings together Policy Advisory Council members and representatives from business, equity and stakeholder organizations. The subcommittee would meet approximately every other month, at MTC's offices in San Francisco.

Participants: The subcommittee will include selected members of the Policy Advisory Council along with invited participants from business, equity and other transit stakeholder organizations.

User Research

The Co-Project Managers will include a user research component in the project's scope of work as a new Task 7. This task will perform research with a sample of Bay Area transit users and non-users to better understand the following topics:

- User understanding of alternative fare policies proposed through the project
- Priorities for transit and how fares and fare system issues compare to other priorities
- Customers' decision-making process leading to and during the trip
- Legibility of the current fare system and what information matters to customers for the purposes of trip planning and mode choice
- The extent to which and specific ways in which the existing fare system presents barriers to transit ridership

In addition, an optional task to enhance user research will be included in the scope of work, if needed, and should more resources be identified.

The Co-Project Managers will report to the Fare Integration Task Force and the Commission on the user research approach and additional resources that may be needed to expand the breadth of that work at the time of contract award action in early 2020.

Next Steps

Should the Commission support the Regional Measure 2 allocation request, the Co-Project Managers expect to release a Request for Proposals from consultant teams, using MTC's procurement process, within the next month.

Recommendation

Staff recommends adding the requirements related to engagement, as well as a report back on the user research scope outlined in this memo into the proposed allocation for the Fare Coordination and Integration Study and Business Case, as detailed in MTC Resolution No. 3815, Revised, Attachment B-3.



Therese W. McMillan

REGIONAL MEASURE 2 PROGRAM Project Specific Conditions

Project Title: Business Case for Transit Fare Integration
Sponsor: Clipper Executive Board
Implementing Agency: MTC
Project Number: 34.3

The allocation and reimbursement of RM2 funds for the above project are conditioned upon the following :

1. The establishment of a Policymaker Forum on Fare Coordination/Integration.

The membership of the Forum will consist of two (2) board members/MTC commissioners from each agency represented on the Fare Integration Task Force, selected by the Chair/President of each Task Force member's governing board.

The Forum will meet at key points over course of the project (total of 3-4 meetings, or approximately quarterly assuming 12-18 month timeline) to receive status updates, provide feedback, and discuss the project. The Policymaker Forum's role will be advisory; the Fare Integration Task Force will remain the governing body for the project.

2. The establishment of a new Subcommittee on Fare Coordination/Integration of MTC's Policy Advisory Council.

The subcommittee will include selected members of the Policy Advisory Council along with invited participants from business, equity and other transit stakeholder organizations.

The subcommittee will meet approximately every other month, at MTC's offices in San Francisco.

3. The Co-Project Managers (BART and MTC) will report to the Fare Integration Task Force and the Commission on the user research approach and additional resources that may be needed to expand the breadth of that work at the time of contract award action in early 2020.

Transit Fare Integration

RM 2 Allocation to Support a Fare Coordination and Integration Study and Business Case

October 23, 2019

MTC Commission



Work Completed To Date

Fare Integration Seminar on Feb. 8, 2019

Agreement to develop a Fare Coordination and Integration Study and Business Case, with transit operator GMs + MTC as the project owner

Development of a scope of work for the study by transit operator and MTC staff

Objectives of the Fare Coordination and Integration Study

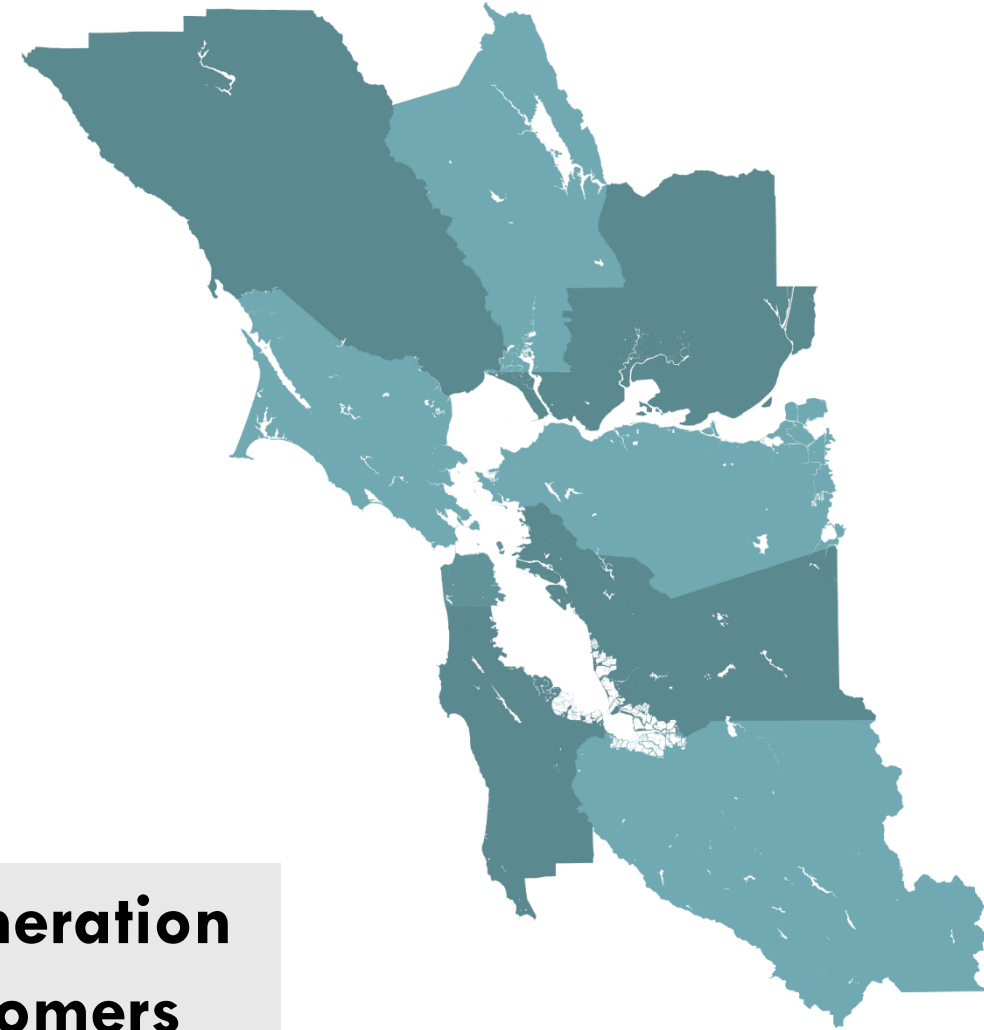
Develop goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;

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

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

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

... And we have an opportunity with Next Generation Clipper to make transit work better for our customers



Fare Coordination and Integration Study

Operators and MTC Working Together

Fare Integration Task Force – Project Ownership

Co-Project Managers – BART & MTC staff

Staff Working Group – Operator staff advise
Co-Project Managers

Business Case Consultant – Performs analysis
with support from Operator/MTC Staff

Fare Integration Task Force



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Recommendation – To add to Allocation Requirements **Policymaker and Stakeholder Engagement**

The Co-Project Managers (BART and MTC) propose to establish:

Policymaker Forum on Fare Coordination/Integration

Convening of transit agency board members and MTC Commissioners at key points during the project

Two (2) board members/MTC commissioners from each agency represented on the Fare Integration Task Force, selected by the Chair/President of each Task Force member's governing board.

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration

New subcommittee of MTC's Policy Advisory Council, meeting approximately every other month

Selected members of the Policy Advisory Council along with invited participants from business, equity and other transit stakeholder organizations.

Recommendation – User Research

The Co-Project Managers (BART and MTC) will include a user research component in the scope of work

Include user research in the project scope of work to examine:

User understanding of alternative fare policies proposed through the project

Priorities for transit and how fares and fare system issues compare to other priorities

Customers' decision-making process leading to and during the trip

Legibility of the current fare system and what information matters to customers for the purposes of trip planning and mode choice

The extent to which and specific ways in which the existing fare system presents barriers to transit ridership

The Co-Project Managers will report to the Fare Integration Task Force and the Commission on the user research approach and additional resources that may be needed to expand the breadth of that work at the time of contract award action in early 2020.

Requested Action

Approve MTC Resolution No. 3815, Revised, to allocate \$599,839 in RM 2 funds (from capital project #34) to support the development of a Fare Coordination and Integration Study and Business Case.

The Clipper Executive Board (the project sponsor for this RM2 capital project) voted on Sept. 16, 2019 to support this allocation request.