

Fare Integration Task Force

February 24, 2020

Agenda Item 3a

Overview of the Fare Coordination / Integration Study and Business Case

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

Background: At its September 2019 meeting the Clipper® Executive Board approved a scope of work for a Fare Coordination/Integration Study and Business Case and designated BART and MTC as Co-Project Managers for the effort.

Key objectives of the project, as defined by the Clipper Executive Board upon approval of the project scope include:

- Developing goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;
- Identifying barriers, especially barriers related to fares and the user experience, that are impeding increased ridership;
- Identifying opportunities to increase transit ridership by improving the regional fare system through regional fare coordination and integration strategies; and
- Developing a detailed implementation plan, including funding plan, for recommended improvements.

The project includes a variety of different venues to provide direction and input to staff and the consultant team including:

Fare Integration Task Force: The Task Force has project oversight responsibilities for all aspects of the project and serves as the owner and sponsor of the work. It consists of the members of the Clipper Executive Board as well as the Chair and Vice Chair of the Bay Area County Transportation Agencies (BACTA) group, currently the executive directors of the Solano Transportation Authority (STA) and the Napa Valley Transportation Authority (NVTA). Both STA and NVTA also manage and/or operate bus services in their counties which utilize both the Express Lanes network and local streets. The MTC Commission also directed staff to include the Executive Director of the Livermore Amador Valley Transit Authority (LAVTA) as a member of the Task Force. The Task Force will meet on average every other month over the course of the project.

Staff Working Group: Staff from each of the agencies represented on the Task Force collaborate with the Co-Project Managers through the Staff Working Group. The Staff Working Group will provide guidance and support to the consultant team throughout the project and meet regularly (approximately every other week).

Policymaker Forum on Fare Coordination/Integration: 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 will 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.

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration:

This new subcommittee of MTC's Policy Advisory Council (a citizen's advisory body to MTC) will bring together Policy Advisory Council members and representatives from business, equity, education, and other stakeholder organizations. The subcommittee will meet approximately every other month, with its first meeting anticipated in April 2020 and serve as the primary public stakeholder body for the project.

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

Issues: None identified.

Recommendation: Information.

Attachment: Presentation slides.



Michael Eiseman, Director of Financial Planning, BART



William Bacon, Policy and Financial Analyst, MTC

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Fare Integration Task Force



Fare Coordination/Integration Study

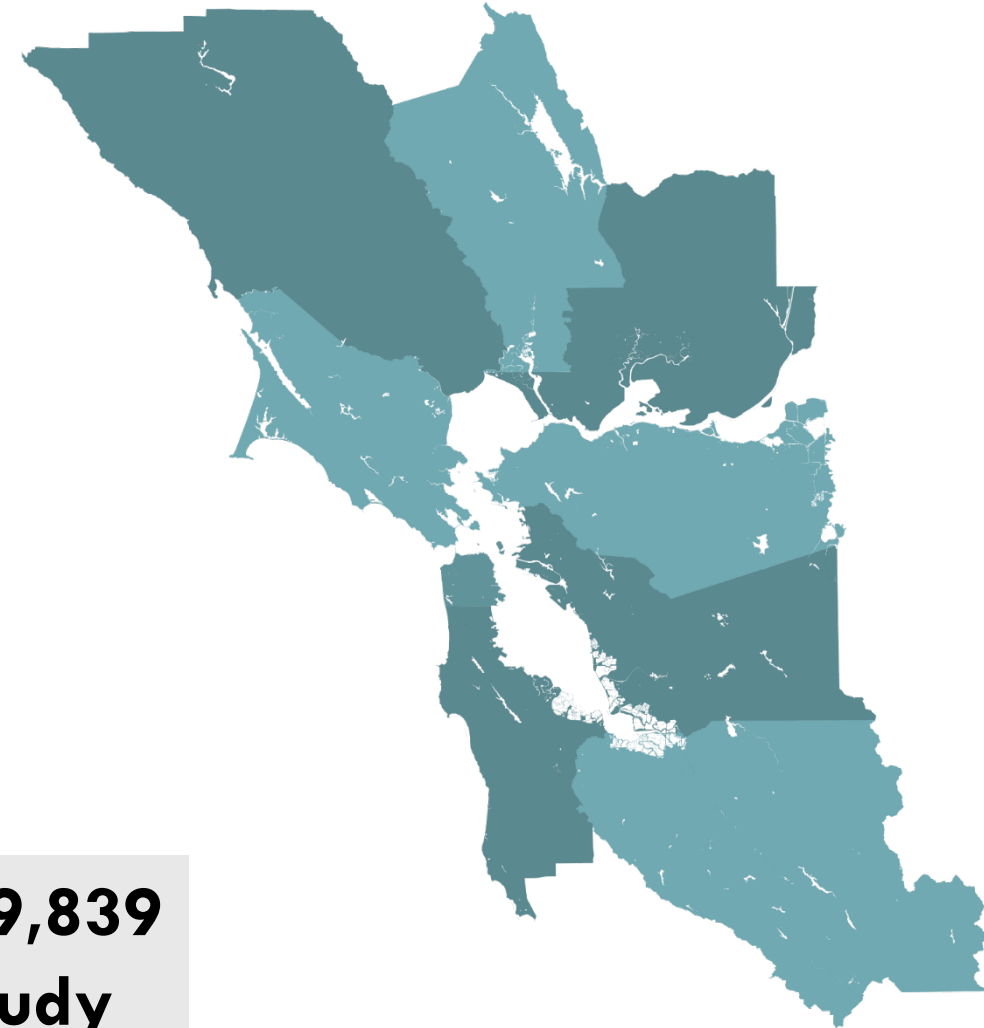
Objectives

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

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

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

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



Commission approved an allocation of \$599,839 in RM 2 funds in Oct. 2019 to support the study

Transit Operators and MTC Working Together

Fare Integration Task Force – Project Ownership

Co-Project Managers – BART & MTC staff

Transit Operator Staff Working Group

Consultant Team

Policymaker and Stakeholder Engagement

Policymaker Forum on Fare Coordination/Integration

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration

Fare Integration Task Force



Project Scope

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



Task 1: Problem Statement and Goals



Task 2: Existing Conditions and Background Research



Task 3: Barriers to Transit Ridership



Task 4: Alternative Solutions



Task 5: Alternatives Analysis



Task 6: Recommendations and Implementation Plan



Task 7: Stakeholder Engagement and User Research

Item 4a

Request to Recommend Award of a Contract for Project Technical Support to Steer



Request for Proposals

Conducted from November 20 to January 8

RFP sent to 2,730 individuals/firms

Proposers' conference attended by 15 firms

Three teams submitted proposals

Cambridge Systematics




LTK Engineering Services

Steer

Selection Process and Recommendation

12 person selection panel consisting of MTC and transit operator staff

After an in-depth process consisting of proposal reviews, interviews, and a subsequent discussion phase staff are recommending award of the contract to Steer

Evaluation Criteria			
Qualification and Experience – 40 points	34.42	34.25	27.00
Approach and Work Plan – 40 points	34.67	31.33	22.42
Cost Effectiveness – 15 points	12.42	10.67	10.08
Price – 5 points	4.92	4.93	5.00
Small Business Enterprise - 5 bonus points	0	0	0
Total	<u>86.42</u>	81.18	64.5

User Experience Research

Commitment at time of Oct. 2019 RM 2 allocation to “report to the 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”

Steer’s proposal partners with sub-consultant OXD to perform a baseline level of user research to inform the development and evaluation of alternatives

\$288,234 in additional funds would allow for more robust user research

Experience mapping, customer personas, co-creation of fare products with customers, testing and prototyping, and workshops

Deeper and broader user-centered research aims to better understand the “why” behind transit usage, barriers preventing ridership, and effective design of alternatives to optimize transit fares

Project Schedule

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- March 2020 - Project team kick off – Staff Working Group + Steer***
 - Spring/Summer 2020 – Initial meetings of MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration and the Policymaker Forum***
 - Fall 2020 – Project team begins development of alternative fare policies for evaluation and user research testing***
 - Winter 2020/21 – Project team conducts detailed analysis of financial and ridership impacts and develops implementation strategies***
 - June 2021– Project team presents final report and recommendations***

Requested Action

Recommend that the MTC Administration Committee authorize the MTC Executive Director or designee to negotiate and enter into a contract with Steer not to exceed \$888,231.

