

**TRANSIT RECOVERY
TASK FORCE**

TO: Blue Ribbon Transit Recovery Task Force

DATE: October 26, 2020

FR: Steve Kinsey, CivicKnit

RE: Stage 3: Transformation Action Plan Scope

The September BRTF meeting was concentrated on Stage 3 (post-recovery) opportunities to work toward a world-class public transit system serving all Bay Area populations. Presentations were made by MTC, transit agencies, and transit advocates, followed by individual member and public comments.

Today's Stage 3 agenda item is designed to draw out what the Task Force wants to prioritize in the *Transformation Action Plan* you are developing. To steer the discussion, four draft Goals are being proposed. They warrant independent reflection and robust discussion, because once adopted, the Goals will drive how the remainder of the Task Force's work is organized. Adoption of specific *Transformation Action Plan* Goals and Objectives is scheduled for the November BRTF meeting.

Goal 1: Recognize Critical Recovery Challenges Facing Transit Agencies

Defer post-recovery service planning to allow Bay Area transit agencies to prioritize difficult fiscal and service choices in the midst of increasing uncertainty.

Goal 2: Advance Equity

Integrate and be accountable to equity in policy, service delivery and advocacy recommendations, as embodied in MTC's Equity Platform.

Goal 3: Propose Near-term Network Management & Governance Reform Actions

Identify specific near-term public transit network management and governance reform actions to facilitate transit transformation.

Goal 4: Clarify the Relationship Between MTC's Current Transit Initiatives & Transformation Planning

Review the scope, timing, and decision process of current MTC transit initiatives and identify specific actions to integrate them with Transformation Action Plan implementation.

As presented, the draft Goals recognize that all public transit operators are deeply engaged in making significant, difficult choices based on the depth of the pandemic's impact on ridership and revenue. The deeply uncertain Stage 2 (Recovery) timeline also affects the operators' capacity to engage in specific transformative planning at this time. Given that, the Task Force is encouraged to consider prioritizing near-term actions that can provide a sturdy foundation for reforms that may take longer to implement.

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TRANSIT RECOVERY
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TRANSFORMATION ACTION PLAN: GOALS AND OBJECTIVES

Steve Kinsey
CivicKnit

October 26, 2020

TODAY'S FOCUS

Overarching question:

What should the Transformation Action Plan achieve?

Today:

- Discussion of proposed Goals and Objectives
- Goals = Scope

Next Month:

Adopt Goals in November



TRANSFORMATION'S FOUNDATION

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TRANSIT RECOVERY
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- **2006 Transit Connectivity Plan** – Identified ways to improve and implement the quality of linkages between transit systems for the customer.
- **2010-2012 Transit Sustainability Project (TSP)** – Addressed financial shortfalls, transit service performance and improved customer experience.
- **2020 Bay Area Transit Ridership Trend Study (UCLA)** - Focused on recent ridership declines, possible causes, and a framework for reversing these trends.



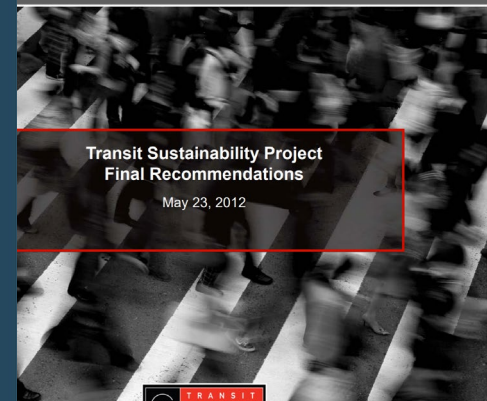
Transit Connectivity Report

Metropolitan Transportation Commission • January 2005

What's Behind Recent Transit Ridership Trends in the Bay Area?

Volume I: Overview and Analysis of
Underlying Factors

February 2020



Transit Sustainability Project
Final Recommendations

May 23, 2012



MTC'S 30-YEAR LEGISLATIVE HISTORY WITH TRANSIT COORDINATION

Two Bay Area specific bills **SB 602** (1989) followed by **SB 1474** (1996):

- Require MTC to ensure operators have a “joint fare revenue sharing agreement consistent with MTC rules and regulations”
- Authorize MTC to:
 - Require coordination of fares and schedules
 - Identify, in consultation with operators, functions that could be consolidated to improve the efficiency of regional transit
 - Improve service coordination and effectiveness in “**transit corridors of regional significance**” by recommending improvements
 - Require compliance with MTC’s regional transit coordination plan as a condition of receiving STA funds

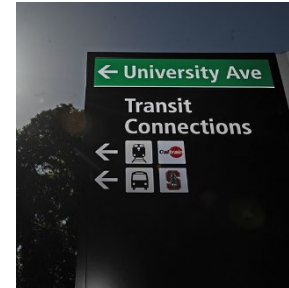
MTC'S CURRENT CUSTOMER-FOCUSED TRANSIT INITIATIVES



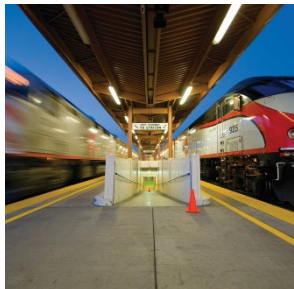
Partnership
Board
Subcommittee/
Connected
Mobility



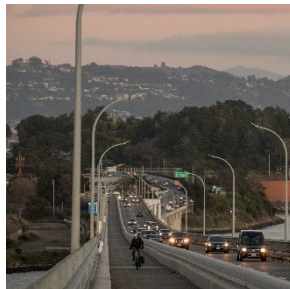
Regional Fare
Integration/
Coordination
Study



Regional
Mapping,
Wayfinding &
Public
Information



Regional Rail
Partnership
Grant



Forward
Projects
(Bay Bridge,
Dumbarton,
Richmond-
San Rafael)



Mobility Hub
Standards
and Pilots

CONCENTRATE ON DOING A FEW THINGS WELL

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- Recognize transit's unprecedented uncertainty
- Assemble the framework for Transformation
- Link Action Plan with the continuum
- Actively involve underserved populations
- Emphasize achievable near-term actions



TRANSIT TRANSFORMATION

Design, adequately invest in and effectively manage an appropriately frequent, accessible, reliable, affordable and better connected public transit network, serving all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

PROPOSED GOALS

1

Goal 1: Recovery

Recognize critical recovery challenges facing transit agencies

2

Goal 2: Equity

Advance equity

3

Goal 3: Network Management & Governance

Propose near-term network management & governance reform actions

4

Goal 4: Current Initiatives

Clarify the relationship between MTC's current transit initiatives & transformation planning

GOALS AND OBJECTIVES: 1

1

Goal 1: Recovery

2

Goal 2: Equity

3

Goal 3: Network Management & Governance

4

Goal 4: Current Initiatives

Goal 1: Recognize critical recovery challenges facing transit agencies

Defer post-recovery service planning to allow Bay Area transit agencies to prioritize difficult fiscal and service choices in the midst of increasing uncertainty

Objectives:

- A. Encourage additional MTC funding and regulatory relief during the Transit Recovery period
- B. Advocate for additional federal and state funding to support Recovery
- C. Receive quarterly Stage 2 updates from Operators and MTC

GOALS AND OBJECTIVES: 2

● Goal 1: Recovery

2 ● Goal 2: Equity

3 ● Goal 3: Network
Management &
Governance

4 ● Goal 4: Current
Initiatives

Goal 2: Advance equity

Integrate and be accountable to equity in policy, service delivery and advocacy recommendations, as embodied in MTC's Equity Platform

Objectives:

- A. Develop specific Equity Principles to guide transit transformation planning
- B. Include focused outreach to current riders, underserved populations, and persons with disabilities to inform the Transformation Action Plan

GOALS AND OBJECTIVES: 3

1 Goal 1: Recovery

2 Goal 2: Equity

3 Goal 3: Network
Management &
Governance

4 Goal 4: Current
Initiatives

Goal 3: Propose near-term network management & governance reform actions

Identify specific near-term public transit network management and governance reform actions to facilitate transit transformation

Objectives:

- A. Using experienced professionals, evaluate regionwide network management alternatives, addressing issues of legal authority, scope of duties, oversight and budget requirements. Recommend near-term reform actions.
- B. Using experienced professionals, evaluate which agency consolidation opportunities should advance in the near-term, and recommend next steps.
- C. Propose state and regional institutional and legislative actions to support transit transformation.

GOALS AND OBJECTIVES: 4

1 Goal 1: Recovery

2 Goal 2: Equity

3 Goal 3: Network
Management &
Governance

4 Goal 4: Current
Initiatives

Goal 4: Clarify the relationship between MTC's current transit initiatives & transformation planning

Review the scope, timing and decision process of current MTC transit initiatives and identify specific actions to integrate them with Transformation Action Plan implementation

Objectives:

- A. Receive presentations on several current MTC transit initiatives and comment on their relationship to the Transformation Action Plan
- B. Identify relationships between MTC initiatives and regionwide network management reforms

PROPOSED GOALS

Questions:

Are these the
right Goals?

Are these the
right Objectives?

1

Goal 1: Recovery

Recognize critical recovery challenges facing transit agencies

2

Goal 2: Equity

Advance equity

3

Goal 3: Network Management & Governance

Propose near-term network management & governance reform actions

4

Goal 4: Current Initiatives

Clarify the relationship between MTC's current transit initiatives & transformation planning

PROPOSED BRT/RTF ROADMAP

BLUE RIBBON



Oct.

Nov.

Dec.

Jan

Feb.

March

April

May

June

STAGE 2 RECOVERY (Operator Led)

PROCESS

SCOPING

STRATEGY OPTIONS

ACTION PLAN



GOAL 1

STAGE 2 Update

STAGE 2 Update

STAGE 2 Update

GOAL 2

EQUITY

GOAL 3

NETWORK MANAGEMENT/GOVERNANCE

GOAL 4

CURRENT INITIATIVES

APPROVAL MILESTONES

Goals & Objectives

Existing Transit Initiatives Memo

Next Steps for Network Management & Governance

Transformation Action Plan



THANK YOU.

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TRANSIT RECOVERY
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www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force



Date: October 26, 2020
Attention: Chair Jim Spering, Blue Ribbon Transit Recovery Task Force
Re: Item 5a. Stage 3: Transformation Action Plan

Dear Commissioner Spering and Members of the Blue Ribbon Transit Recovery Task Force,

We appreciate the commitment of agency staff, elected officials, and other stakeholder groups to the recovery of public transportation, and the ongoing engagement through the Blue Ribbon Transit Recovery Task Force. We strongly support the focus on network management and governance in the task force roadmap. We also applaud the recognition that objective professional expertise will be needed to support the task force in developing a strong governance reform and network management strategy.

We wish to express concern about elements of the draft Transformation Action Plan Scope, Goals and Objectives as circulated in the meeting materials. As currently phrased, the goals and objectives fall short of a Transformation Action Plan that would set the region on the path toward an integrated, equitable public transportation system.

We ask that the Scope, Goals and Objectives be strengthened in order to position our region for meaningful Transit Transformation that addresses the needs of our riders and urgency of our climate crisis.

Our specific suggestions include:

- (1) The Scope, Goals and Objectives should more clearly and specifically identify what we actually want to achieve with transformation. Current wording of “an appropriately frequent, accessible, reliable, affordable and better connected transit network” is a good start, but would benefit from additional specificity, including the need for “fully integrated service, fares, schedules, customer information, and a common identity that creates a unified experience for riders.” We also recommend language that recognizes the goal of optimizing the impacts of existing and future public transit investments in the Bay Area.
- (2) Stage 3 should assess how the state and region can deliver stronger authority to implement transit priority on our streets and highways. This could include more authority for transit agencies to deliver bus priority lanes, implement signal priority, and advance regulations and other infrastructure that supports faster transit service.

- (3) Goal 3 should be amended to clarify that network management and governance analysis and reform actions, including the evaluation of consolidation options, should not be limited to near-term actions. This work should be guided by long-term goals, and should include both near-term and long-term reform actions. We applaud the focus on near-term actions, but this should not exclude consideration of mid-term and long-term strategy.
- (4) The framing of Goal 4 should be improved to clarify that the purpose of learning about existing transit coordination initiatives is to highlight successes, shortcomings, and obstacles of current work, which should feed into network management and governance reform actions. Goal 4 may in fact be more appropriate as a process step in support of Goal 3 rather than its own goal.
- (5) In addition to hearing about MTC-led current initiatives, we request in the near future the Task Force receive a presentation from the California State Transportation Authority about ongoing and related State-led transit initiatives and priorities, including the Statewide Transit Strategic Plan. CalSTA should be invited to provide recommendations for what transformative actions would best support State Goals and plans, and position the Bay Area to be in a competitive position for existing and future state funding.

Thank you for considering these suggestions, which we believe can lead to a clearer and bolder Transformation Action Plan that can set our region up for long term success.

Sincerely,

Ian Griffiths
Policy Director, Seamless Bay Area

Jonathon Kass
Interim Transportation Policy Director, SPUR

Gwen Litvak
Senior Vice President, Bay Area Council

Metropolitan Transportation
Blue Ribbon Transit Recovery Task Force
375 Beale Street, Suite 800
San Francisco, CA 94105

Task Force Members;

On October 14, 2020 the Metropolitan Transportation Commission's (MTC) Policy Advisory Council (PAC) received the same report from SPUR and Seamless Bay Area that was presented to the Blue Ribbon Transit Recovery Task Force (BRTRTF) on September 14, 2020. This presentation was made as part of the Chair's Report which includes the Chair's activities as a member of the BRTRTF.

During the following discussion, the PAC voted unanimously to ask that the BRTRTF and MTC adopt the "Recommendations for the Blue Ribbon Transit Recovery Task Force & Transformation Action Plan" (see next page) as guiding principles.

This PAC considers this a starting point, not an entire package, to fulfill the intent of the BRTRTF's third goal: transformation. Independent analysis that brings all parties to the table will allow us to develop a true regional system that helps agencies serve the needs of their local constituents while becoming part of an integrated whole.

We recognize the immediate issues all transit agencies face and the operational problems during this phase of the crisis. This request should not be considered, in any way, a rebuke or dismissal of the work agencies have done to date.

It is, however, a statement of our desire to rebuild in an equitable and sustainable manner. We appreciate your consideration in this matter.

Sincerely,

A handwritten signature in black ink that reads "Randi Kinman". The signature is written in a cursive, flowing style.

Randi Kinman, Chair
Metropolitan Transportation Commission Policy Advisory Council

Recommendations for Blue Ribbon Transit Recovery Task Force & Transformation Action Plan

While supporting Stage 2 recovery and alignment efforts initiated by transit agencies, the Blue Ribbon Task Force should...

1. Support the long term goal of a connected, equitable, efficient, and rider-focused transit system across the Bay Area that has integrated service, fares, schedules, and customer information, and a common identity.
2. Identify governance and funding reforms, including legislation, that support creation of an effective transportation network manager in the Bay Area with the authority and mandate to integrate all forms of Bay Area transit.
3. Fully analyze of options for transit agency consolidations and their potential to support a more integrated, accessible, rider-focused system.
4. Bring on relevant subject matter experts with domestic and global expertise in effective transportation governance and organization to complete the analysis of governance and funding.