

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 pre-pandemic 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.

Ian 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 of 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 Spring -- 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 Sperling 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 Sprong, 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.