Metropolitan Transportation Commission
Policy Advisory Council

September 8, 2021 **Agenda Item 7**

Transit Transformation Action Plan

Subject:

Blue Ribbon Transit Recovery Task Force's Transit Transformation Action Plan.

Background:

Policy Advisory Council Agenda Item 7, Transit Transformation Action Plan, is attached. This report will be presented to MTC's Operations Committee meeting on September 10, 2021.

Staff will be at your September 8 meeting to deliver and discuss this presentation. The Council's input is requested.

Issues:

None identified.

Recommendations:

Information.

Attachments:

- Attachment A: Agenda Item 5b from the September 10, 2021 Operations Committee meeting.

Metropolitan Transportation Commission
Operations Committee

September 10, 2021 **Agenda Item 5b**

Transit Transformation Action Plan

Subject: Blue Ribbon Transit Recovery Task Force's Transit Transformation Action Plan.

Background: In response to the COVID-19 pandemic, the Commission formed the Blue Ribbon Transit Recovery Task Force in April 2020 to set a course for public transit's recovery and long-term improvement.

Blue Ribbon Transit Recovery Task Force
On May 7, 2020, the Metropolitan Transportation Commission appointed a limited duration, 32-member Blue Ribbon Transit Recovery Task Force, chaired by MTC Commissioner Jim Spering. The group was composed of a diverse set of stakeholders, including advocates for people with disabilities, state legislators, and representatives from the California State Transportation Agency; transit agencies; business and labor groups; transit and social justice advocates; and MTC Commission and Advisory Council. The Task Force met 15 times between May 2020 and July 2021.

The Task Force assisted the Commission with understanding the scale of the COVID-19 crisis facing Bay Area transit systems and was charged with a three-stage purpose:

- **Stage 1:** Assist in the distribution of $500 million in federal Coronavirus Aid, Relief, and Economic Security (CARES) Act relief funds.
- **Stage 2:** Contribute to operators' recovery planning.
- **Stage 3:** Develop a Bay Area Transit Transformation Action Plan.

Transit Transformation Action Plan
Stage 3 was the Task Force's most complex assignment. Over a ten-month period, the Task Force actively debated among its members, listened to public comment, and reached consensus on crucial building blocks that informed the development of an action plan. These building blocks included:

- Goals and Objectives
- Equity Principles
- Problem Statement
- Key outcomes
- Network management roles and responsibilities
- Alternative network management governance options

The culmination of this work is the Bay Area Transit Transformation Action Plan (Action Plan). It identifies five desired outcomes and 27 associated, near-term actions needed to achieve a more connected, efficient, and user-focused mobility network across the Bay Area and beyond. At its final meeting on July 26, 2021, the Task Force approved

these actions and forwarded the Action Plan to the Commission for consideration.

This Action Plan focuses on near-term steps that generate needed customer benefits while simultaneously building toward longer-term system improvements. Transit transformation will take many years to achieve, and the Action Plan's identified actions will not be sufficient on their own. Several important features are built into the Action Plan.

- Shared responsibility and ongoing collaboration among operators, MTC and the spectrum of transit stakeholders.
- Elevating the urgent needs of the region's disadvantaged and low-income populations.
- MTC's existing authority should be exercised fully to implement the plan's recommended actions.
- These actions accompany many other network management duties currently being performed by transit agencies and accelerate the work already underway at MTC on three important customer-focused initiatives.
- A business case analysis of institutional reforms with input from a multi-stakeholder advisory body is necessary to confirm implementation of next steps.

Next Steps
The momentum created by the Task Force will continue through a series of follow-through actions.

1) Return To Transit: This summer, MTC and their partner transit agencies will complete a Return-to-Transit media toolkit that supports a unified communications campaign to be personalized by individual agencies.
2) Network Management: Based on the Network Management Alternatives Evaluation developed by the VIA Architecture team, MTC is initiating the Network Management Business Case analysis that is anticipated to be completed in mid-2022. This analysis will be guided by an MTC-appointed, multi-stakeholder advisory group to serve as a sounding board. The Commission is scheduled to act on this Network Management Business Case Advisory group at the September 2021 Commission meeting.
3) Action Plan Implementation: MTC will begin outlining implementation activities and next steps based on resources, funding and regional priorities, with a focus on fare integration, unified mapping and wayfinding, and travel time advantages for buses as high-priority near-term actions. In October, the Commission will hold a workshop where refinement and details of the Action Plan will be discussed.

Issues: Timely implementation of the Action Plan actions is ambitious. In October, the Commission will hold a workshop to further discuss Action Plan staffing, funding, prioritization, and target completion dates. Target completion dates in the Action Plan are preliminary and will be continually evaluated and refined. Success will be dependent on sufficient funding (combination of existing and new funding sources), staffing resources, and continued collaboration.

Recommendation: Receive and Accept

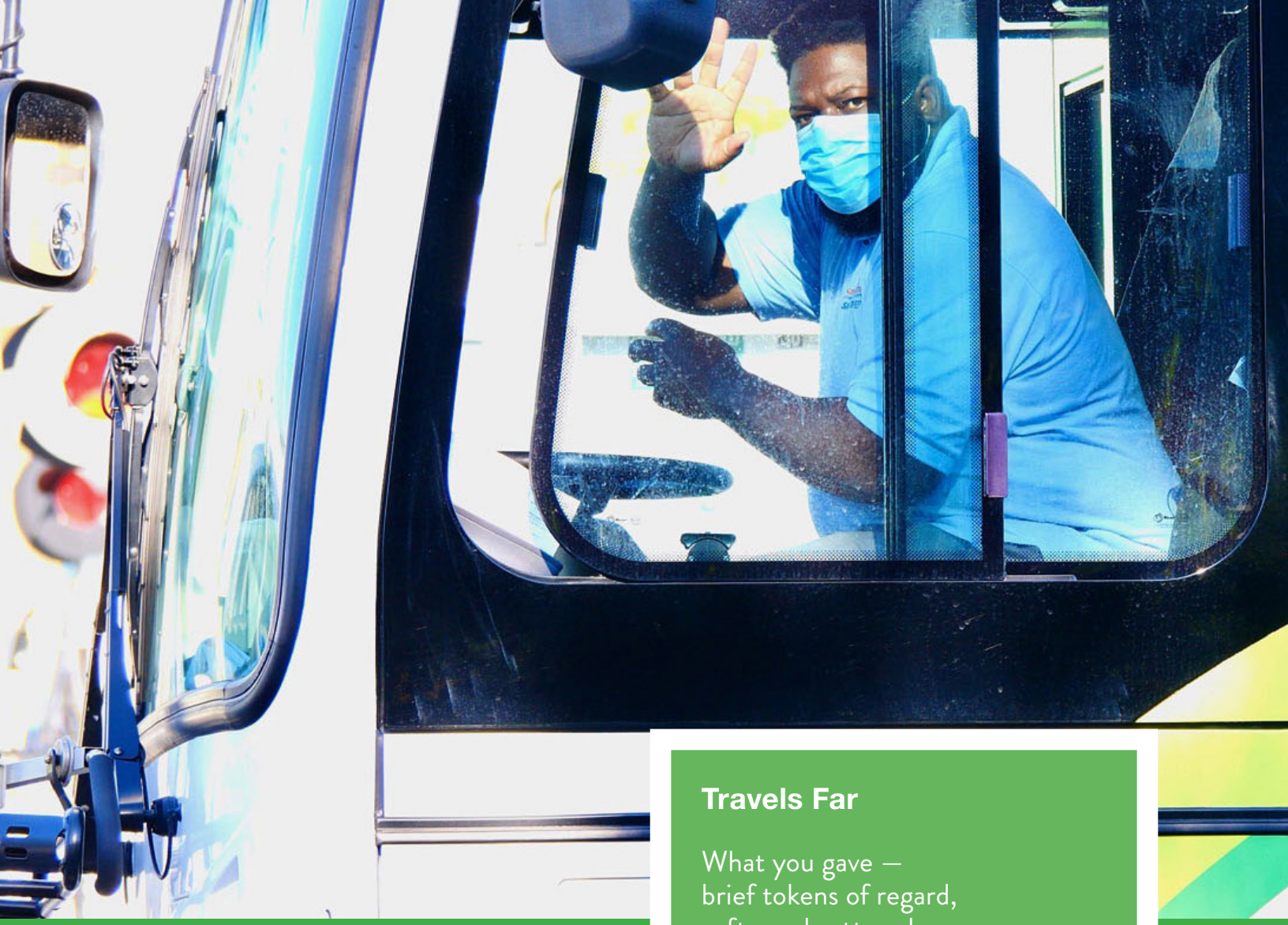
Attachments: Attachment A: Transit Transformation Action Plan
Attachment B: PowerPoint

Therese W. McMillan

BAY AREA TRANSIT TRANSFORMATION ACTION PLAN

JULY 2021

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE



DEDICATION

We are forever grateful for the commitment and perseverance of the Bay Area's transit workers who serve our community through good times and bad, and who held together our region's essential worker lifeline throughout the COVID-19 pandemic. Thank you.

Travels Far

What you gave —
brief tokens of regard,
soft words uttered
barely heard,
the smile glimpsed
from a passing car.

Through stations
and years, through
the veined chambers
of a stanger's heart —
what you gave
travels far.

— Tracy K. Smith

Tracy K. Smith is an American poet and educator. She served as the 22nd Poet Laureate of the United States from 2017 to 2019.

MESSAGES FROM THE CHAIRS

Alfredo Pedroza

Chair, Metropolitan Transportation Commission (MTC)

Since March 2020, COVID-19 has wreaked havoc across our communities and in our personal lives. Public transit services collapsed overnight and will take years to recover. MTC created the Blue Ribbon Transit Recovery Task Force to bring key stakeholders and transit operators together to build unified support during this existential crisis that public transit is facing.

In rebuilding and strengthening transit's vital role in the Bay Area's sustainable future, I stand with those who are determined to rebound equitably by investing resources in ways that overcome historic and current disparities for our most vulnerable communities.

Transforming our transit system while we recover will be challenging. Success depends upon continuing collaboration among all transit partners and fast-tracking customer improvements that will attract new riders and reward returning ones. Prioritizing coordination, capturing operational efficiencies, and securing funding are each essential to achieve the excellent transit system the Bay Area deserves.

MTC is committed to taking a leading role in this effort toward transformative outcomes; continuing our priority focus on fares, mapping and wayfinding; and creating transit travel time advantages on our streets and highways. We also recognize that a strong partnership with transit operators, the private sector, advocates and the public will be essential to creating a reliable, convenient and connected transit network.

As the work of the Task Force ends, I want to thank everyone who contributed to this robust blueprint for change. As Chair of the Commission, I have directed MTC staff to review this Action Plan and bring forward a recommendation for Commission acceptance in September followed by a proposed Year 1 work program by the end of 2021.

Jim Spering

Chair, Blue Ribbon Transit Recovery Task Force

The Blue Ribbon Transit Recovery Task Force was convened in May 2020 in response to the COVID-19 pandemic, and its first charge was to advise MTC on the fair distribution of federal relief funds. Next, it supported transit operators' efforts to determine essential public safety commitments as COVID protocols were evolving.

This Plan is the culmination of the Task Force's work and includes identifying specific, near-term actions needed to achieve a more connected, efficient and user-focused mobility network across the Bay Area and beyond.

Thanks to all 32 Task Force members who spent over a year deep in collaborative dialogue in a respectful search for consensus. Special appreciation goes to the nine transit-agency general managers who actively participated while also tackling historically severe impacts to their organizations.

The Task Force benefited from California Secretary of Transportation David Kim's statewide perspective throughout. State Assemblymember David Chiu's unwavering commitment to seamless transit and his guiding-force clarity deserve special tribute. Enormous gratitude is offered to all transit workers for their steadfast service during this health crisis.

While meeting virtually was tedious at times, our format provided each Task Force member, as well as members of the public, the opportunity to speak. I also appreciate MTC staff's inclusive outreach in support of the Task Force, reflecting the group's adopted Equity Principles.

In truth, we took the opportunity afforded by the crisis to initiate changes that have long been recognized as building blocks of a world-class transit network. I'm proud of the work we've done and hope this Action Plan will inspire MTC and the wide array of community stakeholders and agency partners to move swiftly, and equitably – with primary focus on the customers we serve – to achieve the bold aspirations embedded in Plan Bay Area 2050.

BLUE RIBBON TRANSIT RECOVERY TASK FORCE ROSTER

Task Force members and public participants alike deserve appreciation for generously giving their time and attention to this exercise in civic engagement and shared problem-solving.

METROPOLITAN TRANSPORTATION COMMISSION (MTC)

Jim Spering,
Task Force Chair and Solano County Supervisor

Alfredo Pedroza
MTC Chair and Napa County Supervisor

Nick Josefowitz
MTC Vice Chair and San Francisco Mayor's Appointee to MTC

Cindy Chavez
Santa Clara County Supervisor

Gina Papan
City of Millbrae Council Member

David Rabbitt
Sonoma County Supervisor

Amy Worth
City of Orinda Mayor

Therese W. McMillan
MTC Executive Director

STATE OF CALIFORNIA REPRESENTATIVES

The Honorable Dave Cortese
California State Senate

The Honorable David Chiu
California State Assembly

The Honorable David Kim, Secretary, California State Transportation Agency

TRANSIT OPERATORS

Michelle Bouchard, Caltrain, Acting Executive Director

Carolyn M. Gonot, Santa Clara Valley Transportation Authority (VTA), General Manager

Michael Hursh, Alameda-Contra Costa Transit District, General Manager

Carter Mau, San Mateo County Transit District (SamTrans), Acting General Manager and CEO

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

Robert Powers, Bay Area Rapid Transit, General Manager

Rick Ramacier, County Connection, General Manager

Michael Tree, Livermore Amador Valley Transit Authority, General Manager

Jeffrey Tumlin, San Francisco Municipal Transportation Agency (SFMTA), Director of Transportation

Nancy Whelan, Marin Transit, General Manager

STAKEHOLDERS

Jason Baker, Silicon Valley Leadership Group, Vice President

John Ford, Commute.org, Executive Director

Ian Griffiths, Seamless Bay Area, Co-Founder and Director

Darnell Grisby, TransForm, Executive Director

Daryl Halls, Bay Area County Transportation Agencies

Randi Kinman, MTC Policy Advisory Council

James Lindsay, Amalgamated Transit Union, President

Stacy Murphy, Teamsters 853, Trustee

Susan Rotchy, Independent Living Resource Center, Executive Director

Ellen Wu, Urban Habitat, Executive Director

Jim Wunderman, Bay Area Council, President and CEO

FORMER TASK FORCE MEMBERS

Several Blue Ribbon Transit Recovery Task Force members departed positions during the course of the Task Force or served partial terms. Their service and contribution to the Task Force also are greatly appreciated.

Jim Beall
former California State Senator

Hayley Currier, TransForm, Policy Advocacy Manager

Nuria Fernandez, VTA, former General Manager

Carl Guardino, Silicon Valley Leadership Group, former CEO

Scott Haggerty, former MTC Chair and Alameda County Supervisor

Jim Hartnett, SamTrans/Caltrain, former General Manager/ Chief Executive Officer

Evelynn Tran, VTA, former Interim General Manager

“CHANGE IS HARDEST IN THE BEGINNING, MESSIEST IN THE MIDDLE, AND BEST AT THE END.”

ROBIN SHARMA

2020 began as a normal year in the San Francisco Bay Area. Perennial issues associated with housing, transportation and the economy churned along. FASTER Bay Area, a coalition of community and business groups, was finalizing its legislative request to place a $100 billion ballot measure to fund a seamlessly integrated, world-class transit system before voters in the Fall.

By February 3rd, Assembly Member David Chiu had introduced AB 2057 which called for creating a Bay Area Seamless Transit Task Force to send the Legislature a report proposing reforms to the governance of the Bay Area’s dozens of transportation agencies to maximize the performance of the entire public transit system by January 1, 2023.

Silently and unseen, the nation was also experiencing the first cases of what would become an unprecedented health crisis. The federal government announced the first confirmed case of COVID-19 in the United States on January 21st. Just ten days later, the World Health Organization declared a “global health emergency” and then elevated their declaration to “global pandemic” status on March 11th due to alarming levels of spread. On March 13th, a National Emergency was declared in the U.S. and within a week, California became the first state to issue a stay-at-home order mandating all residents to remain at home except to go to an essential job or shop for essential needs. Life in the Bay Area changed instantly. Since then, over 450,000 Bay Area residents have been infected with the COVID virus and nearly 6,000 persons lost their lives.

As government, business and families struggled to respond to an extraordinary crisis, public transit ridership and revenues collapsed, creating an existential crisis for transit, and exacerbating and vastly deepening the pre-existing problem of declining demand for transit in the region. The Metropolitan Transportation Commission (MTC) moved quickly to respond to the immediate crisis while simultaneously recognizing that times of challenge and pain could offer an opportunity to plant the seeds of transformation for the Bay Area’s public transit system. With this in mind, the Commission on April 22nd established the Blue Ribbon Transit Recovery Task Force to set a course for transit’s recovery and long-term improvement.

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EXECUTIVE SUMMARY

On April 22, 2020, the Metropolitan Transportation Commission (MTC) established a 32-person Blue Ribbon Transit Recovery Task Force (Task Force) to set a course for public transit's recovery and long-term improvement. MTC Commissioner Jim Spering was appointed to serve as Chair. The group was composed of a diverse set of stakeholders, including California State Transportation Agency Secretary David Kim, two state legislators, eight MTC commissioners, the MTC executive director, nine transit agency general managers, and representatives of business, labor, social justice, persons with disabilities, transit advocates, county transportation agencies and MTC's Advisory Council. The Task Force met 15 times between May 2020 and July 2021.

The Task Force was charged with a three-stage purpose:

- **Stage 1 –** Assist in distribution of $500 million in remaining federal Coronavirus Aid, Relief, and Economic Security (CARES) Act relief funds.
- **Stage 2 –** Support operators' recovery planning.
- **Stage 3 –** Develop a Bay Area "Transit Transformation" action plan identifying actions needed to reshape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area and beyond.

Stage 3 was the Task Force's most complex assignment. Over a ten-month period, the Task Force actively debated among its members, listened to public comment, and reached consensus on crucial building blocks that informed the development of an action plan.

"TRANSIT TRANSFORMATION"

DEFINITION: Design, adequately invest in, and effectively manage a public transit network that is equitable, inclusive, frequent, affordable, accessible and reliable; is integrated with unified service, fares, schedules, customer information and identity; and serves all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

These building blocks included:

- Goals and Objectives
- Equity Principles
- Problem Statement
- Key outcomes
- Network management roles and responsibilities
- Alternative network management governance options

The culmination of the Task Force's work is the Bay Area Transit Transformation Action Plan (Action Plan). This plan focuses on the near-term actions (within three years) needed to begin transforming a vulnerable and diffuse network into a more connected, more efficient, and more user-focused mobility network that attracts many more users. It identifies five desired outcomes that are central to achieving transit transformation and 27 associated actions.

Transformation Action Plan Goals & Objectives

(adopted November 16, 2020)

GOAL 1: Recognize critical recovery challenges facing transit agencies.

GOAL 2: Advance equity.

GOAL 3: Identify near-term actions to implement beneficial long-term network management and governance reforms.

GOAL 4: Establish how current MTC and state transit initiatives should integrate with network management and governance reforms.

See *Appendix I* for complete Goals & Objectives

Several important features are built into the Action Plan:

- Ongoing collaboration among operators, MTC and the spectrum of transit stakeholders is essential to achieving a common vision.
- Elevating the urgent needs of the region's disadvantaged and low-income populations is central to planning and investment.
- MTC's existing authority should be exercised fully to implement the plan's recommended actions.
- Actions intended to accelerate work already underway at MTC on three important customer-focused initiatives – fare integration, unified mapping and wayfinding, and travel time advantages for buses – are high-priority, near-term actions.
- A business case analysis of institutional reforms with input from a multi-stakeholder advisory group is necessary to confirm implementation next steps.

This Action Plan focuses on near-term steps that generate needed customer benefits while simultaneously building toward longer-term system improvements. Transit transformation will take many years to achieve, and the Action Plan's identified actions will not be sufficient on their own. Independent and collaborative efforts by all transit operators must continue and grow. Joint legislative

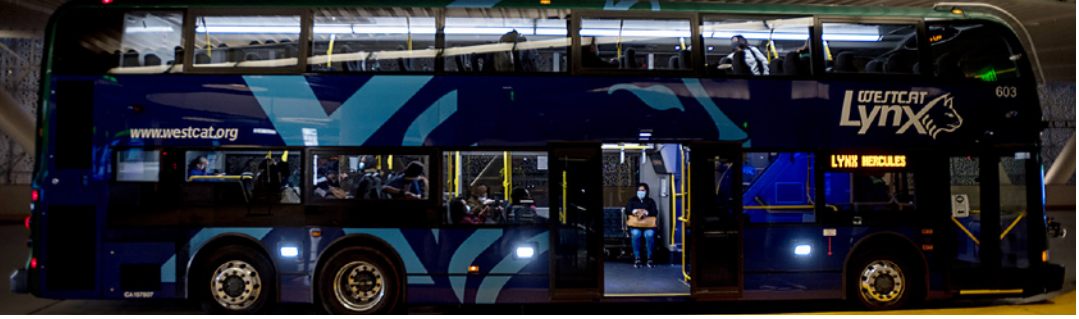
advocacy and consistent public communication must be bolstered. Partnerships must be forged through the rail partnerships assessment grant and integrated with the Action Plan as it is implemented.

The Task Force jump-started this journey and has generated momentum, but restoring and growing transit ridership in the Bay Area will require an ongoing effort across multiple geographies and levels of government. Much of this work is and will continue to be focused at the local and sub-regional levels – where most transit trips occur. As the pandemic subsides, however, there is also a significant and not-to-be-missed opportunity to create an efficient, coordinated and customer-friendly system that enables Bay Area residents and visitors alike to confidently navigate across the region's transit system with speed and ease.

The Action Plan's ultimate success will depend on a commitment by MTC and transit operators to embrace changes that put the customer first, continued collaborative efforts with stakeholders, jointly developed legislative initiatives, and vital new sources of transit funding.

Transformational Outcomes

Fares and Payment	Simpler, consistent, and equitable fare and payment options attract more riders.
Customer Information	Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.
Transit Network	Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.
Accessibility	Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.
Funding	The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.



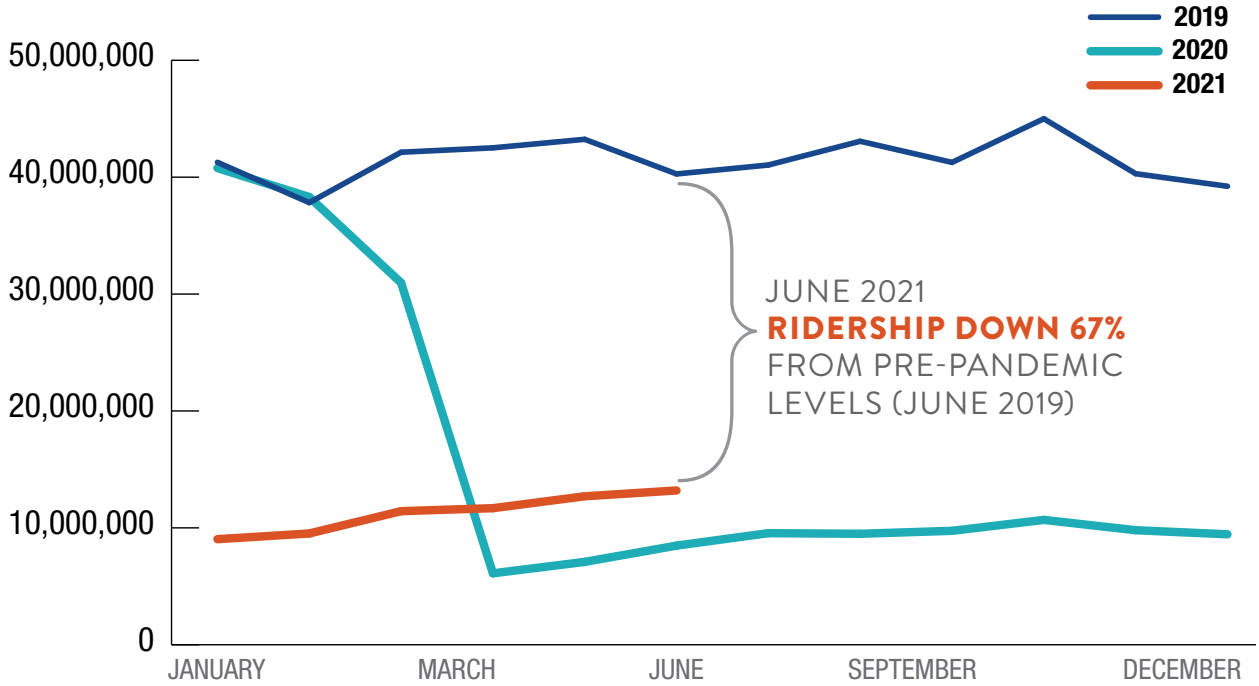
APPROACH: BLUE RIBBON TRANSIT RECOVERY TASK FORCE

A Crisis for Public Transit

The COVID-19 pandemic and the economic disruption associated with it have created the most serious and complex crisis for public transit in Bay Area history. Stay-at-home orders and public health concerns resulted in a dramatic drop in ridership on Bay Area transit — and it is unclear when, and to what extent, transit ridership will return to pre-pandemic levels.

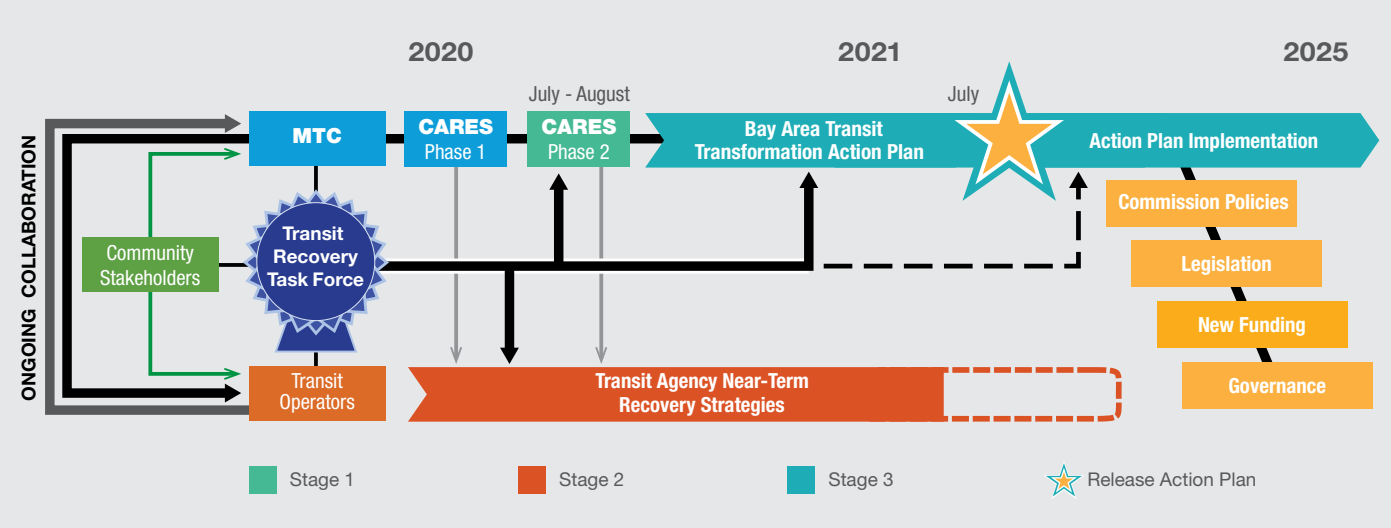
As of June 2021, ridership across the Bay Area was down by a crippling 67 percent. This loss of riders generated an acute and existential near-term crisis for our transit system, deepening the pre-existing condition of falling demand for transit across the nine counties. If not reversed, this decline in ridership threatens to debilitate our transit system, jeopardizing both the near- and long-term financial viability of individual transit operators and negatively impacting Bay Area transit riders.

BAY AREA TRANSIT RIDERSHIP [ALL OPERATORS]



Source: National Transit Database and Operator Data

APPROACH: BLUE RIBBON TRANSIT RECOVERY TASK FORCE



Task Force Stages

In April 2020, the Metropolitan Transportation Commission (MTC) appointed the 32-member Blue Ribbon Transit Recovery Task Force to immediately assist MTC with understanding the scale of the crisis facing Bay Area transit operators as a result of the COVID-19 pandemic — and responding to the crisis.

Stage 1: Survival

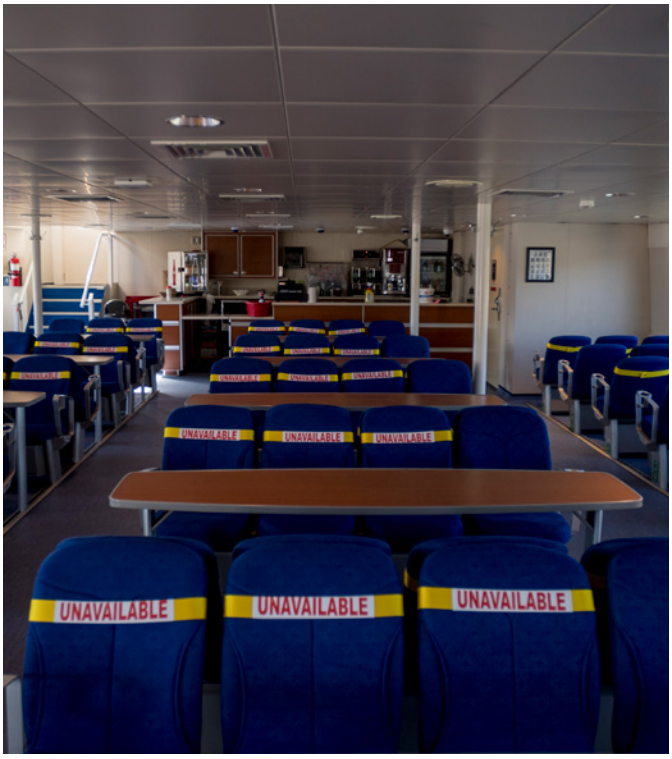
The first stage of the Task Force's work was to recommend to the Commission a fair and thoughtful distribution of $500 million in phase 2 federal CARES Act relief funds to the Bay Area's 27 transit operators. Retaining service for essential trips serving low-income and vulnerable riders was confirmed as the highest priority.

Stage 2: Recovery

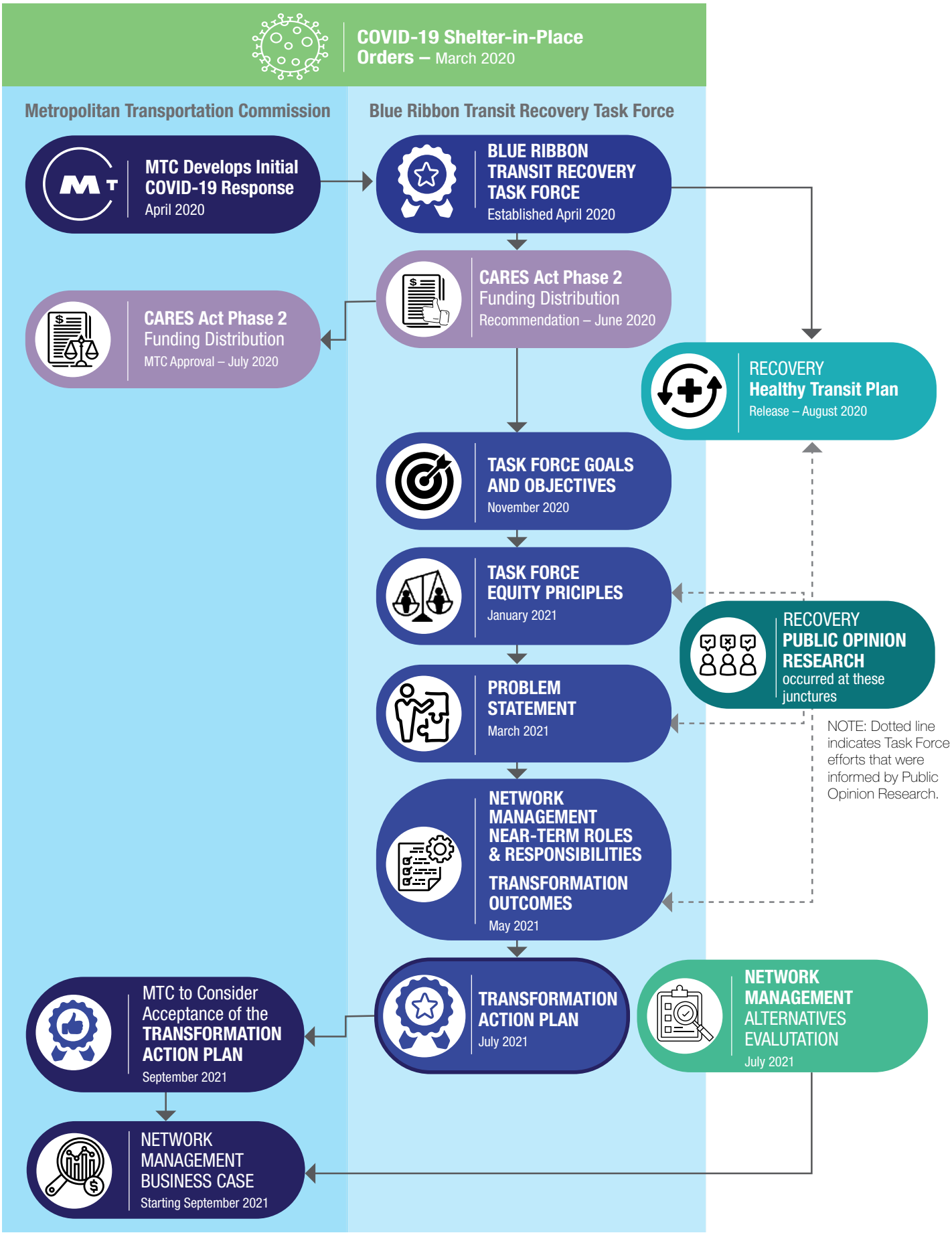
In the second stage of its work, the Task Force focused on transit operators' near-term recovery strategies and supported their collaborative recovery practices. Rider and transit employee safety, consistent cleaning protocols, and transparent public communication were key Task Force interests. Two products of this stage were the Bay Area Healthy Transit Plan, outlining common public safety commitments and expectations for transit employees and passengers, and a "Return to Transit" communications toolkit to support a regional marketing campaign that Bay Area transit operators plan to launch in August of 2021.

Stage 3: Transformation

In the third and final stage of its work, the Task Force embarked on identifying high priority, customer facing improvements to the Bay Area transit network that would help turn the tide on falling ridership despite the serious funding shortages that transit operators anticipate in the years to come. In recognition that the future of Bay Area transit will undoubtedly be different than before COVID-19, the Task Force focused on finding ways to make Bay Area transit more attractive for riders.



APPROACH: BLUE RIBBON TRANSIT RECOVERY TASK FORCE



APPROACH: BLUE RIBBON TRANSIT RECOVERY TASK FORCE

During its term, the Task Force set Goals and Objectives and Equity Principles for the Action Plan, jointly developed a Problem Statement, considered the wide range of network management roles and responsibilities, and selected those that should be evaluated for near-term actions. It also heard presentations on current state and MTC initiatives, agency integration progress in Sonoma County, and public opinion research. The Task Force invited members to submit alternative governance proposals to support the Action Plan's implementation.

An independent consultant team of transit management and design professionals considered the Task Force's work, reviewed the submitted governance proposals, and interviewed a cross-section of stakeholders before developing its own network management alternatives and comparing them. The consultants' report also identified how their work leads into a more detailed business case analysis.

The Task Force's final act is to submit this Bay Area Transit Transformation Action Plan to MTC for its consideration and possible adoption. The Action Plan identifies near-term 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.

Restoring and growing transit ridership in the Bay Area will require an ongoing multi-front effort to address the challenges transit faces across multiple geographies and levels of government. Much of this work is and will continue to be focused at the local and sub-regional levels – where most transit trips occur. As the pandemic subsides, however, there is also a significant and not-to-be-missed opportunity to create an efficient, coordinated and customer-friendly system that enables Bay Area residents and visitors alike to confidently navigate across the region's transit system and beyond with speed and ease.

SPOTLIGHT: **EQUITY**

Residents of the Bay Area, much like the United States as a whole, have dramatically different household incomes, educational attainment and health outcomes depending on race. These differences reflect generations of exploitative and discriminatory policies that denied Black, Indigenous and other people of color the opportunities afforded to white Americans. COVID-19 further exacerbated America's long-standing disparities: the disease spread more easily in under-resourced areas and imposed greater risk on low-income, transit dependent and low-wage essential workers who often had to work in less safe conditions.

While a significant number of Bay Area workers shifted to remote work overnight, a disproportionate share of people of color did not have this option, working as essential or low-wage workers in settings where they were at higher risk of exposure to COVID-19. As shelter-in-place orders took hold, only those with no other choice remained on transit, and were especially impacted by cutbacks in service and social distancing rules that placed limits on passenger capacity.

The Blue Ribbon Transit Recovery Task Force recognized these harsh and unfair consequences, and sought to address equity in its work. At the core of transit equity is the notion that transit is a fundamental public good – equitable and inclusive – that everyone benefits from, regardless of age, race, gender identity, disability, or class.

An equitable transportation system is one that is safe, affordable, and reliable in meeting the needs of all residents, but especially those with the fewest options. Equity also means thoughtful consideration of who benefits from a transportation investment when prioritizing projects. Quality service should be affordable and accessible.

One of the Task Force's four Plan Goals (see *Appendix I*) called for the inclusion of input from underserved populations, transit-dependent riders, and persons with disabilities to inform this Action Plan.

Blue Ribbon Transit Recovery Task Force

Equity Principles

(adopted January 25, 2021)

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 and 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.

"TRUE INCLUSION, AUTHENTIC INCLUSION, IS [WHEN] THE PEOPLE WHO WE SAY WE WANT TO FEEL WELCOME ACTUALLY HAVE SOME DECISION-MAKING POWER."

"WE MUST LOOK BACK AT THE INJUSTICES IN THE POLICIES AND DESIGNS WHICH WERE ACTIVELY RACIST IN ORDER TO BE INTENTIONALLY ANTI-RACIST. HOW DO YOU LOOK AT THE PAST, THE PRESENT, AND THE FUTURE ALTOGETHER TO INFORM DECISIONS, SO YOU DO NOT REPEAT RACIST ACTIONS MOVING FORWARD?"

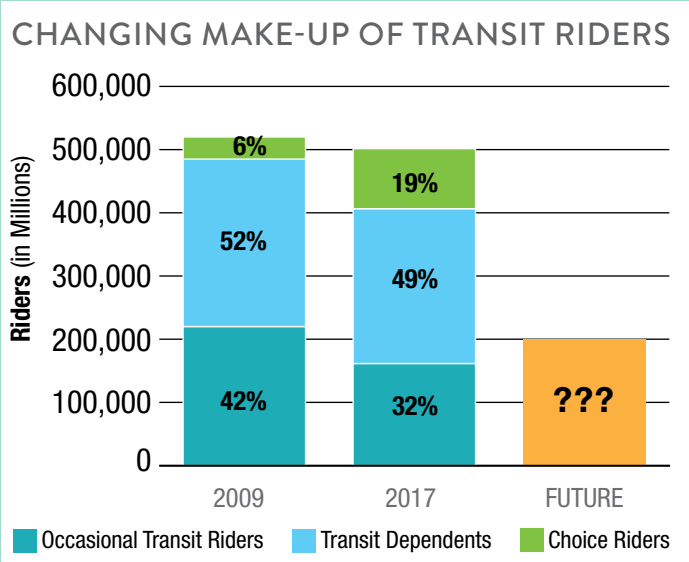
– Insights heard during Blue Ribbon listening session with Bay Area CBO leaders, January 14, 2021

The Task Force also adopted five Equity Principles central to planning and operations (*see previous page*), based on input directly from disadvantaged riders and community leaders. These principles can serve as a compass to continually point leaders, public agencies, advocates, and communities toward an equitable and lasting recovery.

The Task Force's adopted Problem Statement (see *Appendix II*) acknowledges historic disparities facing persons of color due to failed housing and lending practices, and cites the lack of a unified plan in the region to address the legacy of disenfranchisement and marginalization.

As our transit system starts to rebuild, this Action Plan seeks to achieve specific, near-term actions that advance equity, including addressing customer experience through more integrated fares that reward frequent riders; faster, more frequent service to improve travel speeds for those who rely on transit; and improvements to paratransit.

In partnership with transit agencies, community-based and non-profit organizations, and equity-priority communities, MTC has an opportunity to accelerate progress toward equity goals. This Action Plan also calls for MTC to adopt Transit Equity Principles and develop a process for applying them, an endeavor that could help address enduring injustices and have wider-reaching impacts for transit equity. The expanded use of equity analyses and inclusive decision-making, for example, could shape transit investments by prioritizing funding for projects that expand access to opportunity to underserved residents and those with lower incomes.



What can data tell us? Who is riding transit now? How can we meet the needs of current riders, and what other data do we need in the future?

(2009 & 2017 Data Source: UCLA Institute of Transportation Studies, "What's Behind Recent Transit Ridership Trends in the Bay Area?" February 2020)

CONTEXT: IDENTIFYING THE PROBLEM

Challenges Existed Prior to the Pandemic

Even before the pandemic, transit ridership in the Bay Area was falling. A 2020 study completed by UCLA's Institute of Transportation Studies determined that in 2017 and 2018, the Bay Area lost over 5 percent 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. The study cited a growing jobs-housing imbalance and displacement of low-income residents to less transit-rich neighborhoods as contributing factors, along with app-based ride-hail services as possible causes of declining transit ridership.

If not reversed, this decline in ridership could 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, particularly those who rely upon it as their primary mode of transportation, and fundamentally undermining the value of the public's past investments in transit as a public good. In addition, the region's roadway system has

Problem Statement

In March 2021, the Task Force approved a problem statement that identified a broad range of transit challenges across four categories.

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, inter-agency travel. Strong collaborative action is needed to restore and grow transit ridership to reach the ambitious targets associated with Plan Bay Area 2050's vision of a more affordable, connected, diverse, healthy, and vibrant Bay Area for all.

- **Organizational/Institutional Challenges:** Network management resources and authority; multiple agency coordination; addressing transit priority and rights-of-way; local-school access and inter-agency paratransit service; and data collection and management.
- **Customer Experience:** Addressing schedule coordination; fares; trip-planning services; and health and safety concerns.
- **Past and Current Disparities:** Addressing regional housing and development policies; access to opportunity; and inclusive planning.
- **Transit Costs and Funding:** Addressing funding disparities; barriers to raising revenue; integrated revenue strategies; administrative and operational efficiencies; and trade-offs.

See *Appendix II* for full Problem Statement

insufficient capacity to absorb the traffic increase that would occur with the collapse of the Bay Area's transit systems, creating traffic gridlock as well as an increase in greenhouse gas and other vehicle emissions harmful to air quality.

Transit Transformation is Not a New Idea

To avoid these negative impacts that would result from the collapse of the region's transit system, the Bay Area must identify the major challenges facing transit, confront them directly, and identify a path toward a flexible, affordable, well-funded transit system that more people will use for more trips. Transit ridership's downward trend must be reversed by making the system a more attractive choice than the automobile.

Over the last several decades, the region has pursued various transit reform initiatives and major capital investment programs towards this end.

- In 1998, MTC adopted Resolution 3055, MTC's Transit Coordination Implementation Plan pursuant to SB 1474 (Kopp, 1996). That resolution was revised four times and superseded by MTC's Resolution 3866 in 2010, which includes requirements applicable to the Clipper® regional transit-fare payment card and fare media, transit information displays, hub signage, paratransit, and transit rider surveys.
- In 2004, voters approved Regional Measure 2, providing significant operating and capital investment in transit, promotion of transit commuter benefits, and requiring a regional transit connectivity plan, an integrated fare study, benefits, and a regional rail master plan.
- In 2012, MTC adopted the Transit Sustainability Project, which identified specific goals and objectives related to ridership, customer-focus, and regional coordination.
- In 2018, voters approved Regional Measure 3, which included additional funding for transit operating expenses and major capital expansion, including funding to begin the design of a new transbay rail tube, significantly expanding ferry service and extending BART to San Jose.
- 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 2020, Assemblymember Chiu introduced AB 2057, which proposed a pilot of a multi-agency transit pass, development of an integrated mapping and wayfinding system, and establishment of a task force to identify governance changes needed to bring about a seamless public transit network.
- In 2021, the first year of a new two-year legislative session, Assemblymember Chiu introduced an updated bill, AB 629 to continue his effort to bring about more integrated transit fares, an integrated mapping and wayfinding system, and real-time transit information.
- In 2021, MTC's Plan Bay Area 2050 Blueprint identified several beneficial transit program enhancements needed to create an expanded, fast, frequent, efficient, and safe multi-modal transportation system that would substantially grow transit ridership.

Despite these efforts, significant barriers to the Task Force's vision remain and must be addressed if the Bay Area is to reverse its downward ridership trend.

A Call to Action

Today, even more than before the COVID-19 pandemic, the Bay Area must take the steps needed to bring back transit riders. This will require difficult decisions that should be guided by a fact-based, constructive discussion about change. The Task Force has grappled with how best to reposition the region's transit system to deliver a more effective and efficient transit system that more people will use for more trips – and thereby build a foundation for future financial support.

MTC's Transit Coordination Authority

As the regional transportation planning agency (RTPA, a state designation) and metropolitan planning organization (MPO, a federal designation) for the nine-county San Francisco Bay Area, MTC has considerable responsibility and authority with respect to funding and coordinating the region's more than two dozen public transit systems. Chief among them is the distribution of state and federal funds. While the funding amounts provided to individual transit agencies for some programs are determined on a formula basis, the Commission has discretion over hundreds of millions of dollars in annual federal funds as well as the population-based portion of State Transit Assistance funds.

MTC and the Bay Area's transit providers are working toward providing better information about key transit modes and connections.

Coordination Legislation

Beginning in the 1980s and culminating with enactment of SB 1474 (Kopp) in 1996, the state Legislature gave MTC increasing levels of responsibility to adopt policies requiring the coordination of routes, schedules, fares and transfers, and to condition the disbursement of both revenue-based and population-based STA funds on compliance with these requirements. In 2003, the Legislature expanded on this authority with the enactment of SB 916 (Perata), which required MTC to adopt and regularly update a Regional Transit Connectivity Plan and to condition receipt of Regional Measure 2 bridge toll funds on compliance with that plan.

Resolution 3866

MTC implements these transit coordination requirements through Resolution 3866, which was updated most recently in 2015 and lists out the transit coordination requirements by which operators must abide as a condition of receiving any MTC discretionary funds. It contains three key elements: (1) transit coordination implementation requirements applicable to 511 traveler information, regional transit hub signage, Clipper® implementation, maintenance of coordinated service, transit rider surveys; (2) fare and schedule requirements; and (3) regional transit information displays.

Resolution 3866 can be updated by the Commission to incorporate additional requirements or to modify existing ones after consultation with a technical advisory committee of transit operators, followed by input from the Partnership Transit Coordination Committee or PTCC — the renamed Regional Transit Coordination Council, which SB 1474 required MTC to establish — comprised of MTC's Executive Director and the region's transit agency general managers. The PTCC has not met formally since the last Resolution 3866 update in 2015 but will be reconvened if items in this Action Plan are proposed for incorporation into an update of the resolution.

SPOTLIGHT: **PUBLIC OPINION RESEARCH**

The Blue Ribbon Transit Recovery Task Force was informed by wide-reaching public opinion research and feedback from targeted focus groups. The findings helped the Task Force to understand public perceptions of transit before the pandemic, during the emergency, and looking into the future; to hear the perspectives of underserved groups; and to gauge public opinion regarding "seamless transit" legislation, a more integrated Bay Area transit system, and increased network management.

The findings presented to the Task Force were based on reviews of prior related research, community focus groups, employer focus groups and surveys, a statistically valid poll of Bay Area residents, and numerous community focus groups in English, Spanish, Cantonese, and with persons with disabilities.

A BETTER FUNCTIONING TRANSIT SYSTEM IS SEEN AS CRITICAL FOR EVERYONE IN THE BAY AREA, NOT JUST TRANSIT RIDERS. **THE VAST MAJORITY (87%) OF BAY AREA RESIDENTS POLLED BELIEVE PUBLIC TRANSIT IS IMPORTANT.**

– Blue Ribbon Transit Recovery Task Force Public Opinion Poll, April 2021

Everyone wants the same things:

92%	find real-time information on wait times and vehicle locations important
91%	find more direct service, fewer transfers, and shorter wait times important
88%	find a regional network that can set fares, align routes and schedules, and standardize information important
92%	find easy to use and uniform maps and signage important
90%	find a single mobile app for planning, schedules, and information important
89%	find a single set of fares, passes, discounts, and transfer policies important
80%	find dedicated travel lanes along key transit routes for buses and carpools important

Source: Blue Ribbon Transit Recovery Task Force Public Opinion Poll, April 2021

A primary and overarching finding from the research was that certain factors consistently and persistently influence how often people ride transit in the Bay Area. People are most likely to ride when they feel that transit service is simple to understand and easy to use; is reliable, predictable, and frequent; and is safe and clean, affordable, accessible, and connects them to their destination.

Better connectivity and coordination across modes and agencies stand out in the research as ways to improve convenience and ease of travel, and to increase ridership, including:

- Better transit connections between modes and agencies.
- Better coordination between agencies on fares and schedules.
- Better coordination with other forms of transportation, such as on-demand ride services, bike and scooter share, paratransit, and other first/last mile options

The poll also showed that 90% of Bay Area residents support legislation to coordinate the Bay Area's public transit systems so they operate as one seamless, multimodal system — including consistent mapping and signage to make transit easier to navigate, regional fares so riders pay one fare for their entire trip even if they must transfer, and real-time vehicle location data so riders know when a bus, train, or ferry will arrive.

ACTION PLAN: OUTCOMES AND ACTIONS

A Blueprint for Attracting More Riders to Transit

The Bay Area Transit Transformation Action Plan identifies five outcomes that would constitute substantial progress towards the Transit Transformation vision and 27 near-term actions needed to achieve them.

The outcomes grew from 14 Task-Force-approved priority roles and responsibilities for network management reform consideration (see *Appendix III*), which were selected from a larger list of 21 roles and responsibilities that included mega-project delivery and oversight. An initial description of the roles and responsibilities was developed to clarify and guide Task Force discussions (see *Appendix IV*) and will be refined in the upcoming business case assessment.

Each action is targeted for completion within approximately one to three years and can be achieved through a combination of existing resources, increased efficiencies, and new funding. To succeed, funding and staffing resources must be identified and collaboration among transit operators, MTC and other stakeholders will need to continue and increase. Target completion dates are preliminary and subject to continued evaluation and refinement.

The actions outlined in this plan are steps that will build toward a transit vision requiring many years to fulfill. These near-term actions will yield immediate customer benefits while building momentum for longer-term improvements. The Action Plan's identified actions will not be sufficient on their own to achieve transit transformation; independent and collaborative efforts by all transit operators must continue and expand. Joint legislative advocacy and consistent, well-researched public communication must be bolstered.

Transformational Outcomes

Fares & Payment: Simpler, consistent, and equitable fare and payment options attract more riders.

Customer Information: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.

Transit Network: Bay Area transit services are equitably planned and integrally managed as a unified, efficient and reliable network.

Accessibility: Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.

Funding: The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

The current grant-funded assessment of rail partnerships (see at right), which did not synchronize with the Action Plan's timing, is an example of an important related effort that may yield significant new recommendations related to transit transformation.

Accelerated Actions

Central to this Action Plan is an endorsement of three initiatives that were underway before the pandemic and were widely supported by the Task Force as being robust, transformative, and impactful. The Action Plan recommends that MTC accelerate these efforts and give them priority for funding and staffing resources relative to other actions.

- Fare Integration and Policy
- Mapping and Wayfinding
- Bus Transit Priority on Roadways

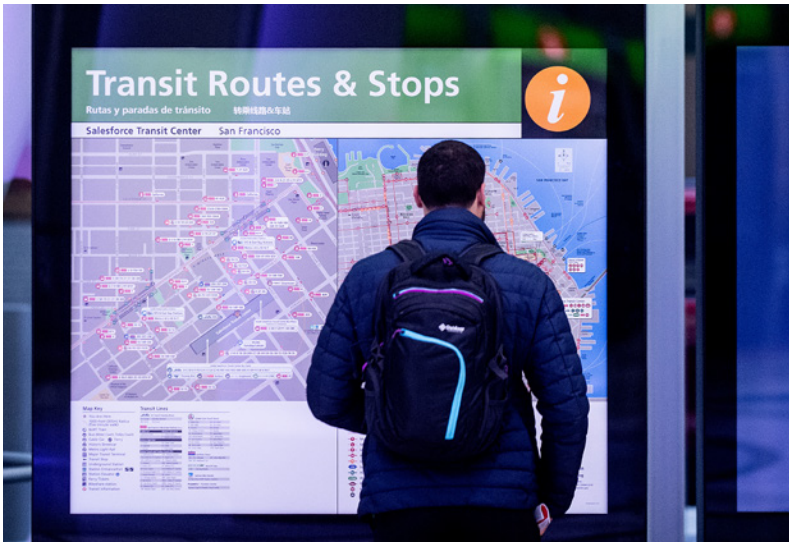
Network Management Evaluation

The Task Force requested that an independent assessment of network management alternatives be completed prior to the sunset of the Task Force to serve as the foundation for a more in-depth business case evaluation of these alternatives.

In developing their assessment of network management alternatives, the consultant team reviewed the Task Force's prior work, interviewed a range of Task Force members, utilized a half-day Ad Hoc Committee workshop and the June Task Force meeting to frame their evaluation criteria and governance options. The consultants presented a Summary Report that compared governance models and proposed a framework for evaluating specific reforms before implementing them. This work took place in parallel to the Task Force's work in developing the Action Plan.

Rail Partnerships Assessment: Project Delivery and Governance

Independent but related to the Network Management Business Case is a current grant-funded assessment of rail project delivery and governance. This rail assessment will be initiated in late summer 2021 and will evaluate various regional rail governance alternatives and megaproject delivery approaches across the region. While separate, the rail assessment will inform and be informed by the Network Management Business Case and ongoing rail governance policy considerations throughout the region and the state of California as a whole.



Fares and Payment: Simpler, consistent, and equitable fare and payment options attract more riders.

Network Management Roles & Responsibilities:

- **FARE INTEGRATION POLICY**

CURRENT & ONGOING EFFORTS

- Clipper® regional transit-fare payment card
- Clipper START
- Inter-operator transfer policies
- Mobile payment apps

FARES & PAYMENT

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
1. Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects.	December 2021	MTC, Transit Operators	TBD
2. Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations.	December 2021	MTC, Transit Operators	$
3. Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations.	Mid-2022	MTC, State Legislators	$

* Key to Estimated Range of Funding Needs:

$	= $0 - 10 million	$$$$	= $101+ million
$$	= $10 - 50 million	TBD	= Estimate not currently available
$$$	= $51 - 100 million		

Customer Information: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.

Network Management Roles & Responsibilities:

- **BRANDING, MAPPING AND WAYFINDING**
- **TECHNOLOGY AND MOBILE STANDARDS**
- **MARKETING/PUBLIC INFORMATION**

CURRENT & ONGOING EFFORTS

- Return-to-Transit campaign and future regional marketing campaigns
- 511 Infrastructure
- Business groups' employer surveys
- BART's station access signage & wayfinding standards update/ implementation

CUSTOMER INFORMATION

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
4. Fund and finalize regional mapping and wayfinding standards for application across all operator service areas.	Mid-2023	MTC, Transit Operators	$
5. Fund and complete 1-3 consistently branded North and East Bay subregional mapping and wayfinding pilot projects and adopt timeline for subsequent regionwide deployment across all service areas.	Late 2024	MTC, Sonoma, Solano, Eastern Alameda and Contra Costa counties	$$
6. Fund and develop a regional mapping data services digital platform, to enable the standardization and routine updating of digital and paper maps across all transit services.	Late 2023	MTC, Transit Operators	$

* Key to Estimated Range of Funding Needs:

$	= $0 - 10 million	$$$$	= $101+ million
$$	= $10 - 50 million	TBD	= Estimate not currently available
$$$	= $51 - 100 million		

Transit Network: Bay Area transit services are equitably planned and integrally managed as a unified, efficient and reliable network.

Network Management Roles & Responsibilities:

- **BUS/RAIL NETWORK MANAGEMENT REFORM**
- **CONNECTED NETWORK PLANNING**
- **CAPITAL PROJECT PRIORITIZATION**
- **BUS TRANSIT PRIORITY**
- **STATION HUB DESIGN REVIEW**
- **DATA COLLECTION AND COORDINATION**

CURRENT & ONGOING EFFORTS

- Regional transit priority and arterial investment programs
- SFMTA emergency transit lanes
- Richmond-San Rafael, Dumbarton and Bay Bridge Forward projects
- Blue Ribbon Task Force and related collaborations
- Transit Sustainability Project (TSP)
- Synchronize schedule changes across operators
- Operators' schedule and hub transfer coordination improvements
- Operators' transit hub coordination framework
- Transit connectivity tool (software)
- Regional Annual Transit Passenger Survey

BUS TRANSIT PRIORITY [speed & reliability]

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
7. Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions.	December 2021	CalSTA, MTC	$
8. Sponsor legislation to remove barriers to transit priority implementation.	Early 2022	MTC, Transit Operators	$
9. Fund the design and delivery of prioritized near-term transit corridor projects.	Mid-2022	MTC, Transit Operators, County Transportation Agencies (CTAs)	$$$$

* Key to Estimated Range of Funding Needs:

$	= $0 - 10 million	$$$$	= $101+ million
$$	= $10 - 50 million	TBD	= Estimate not currently available
$$$	= $51 - 100 million		

Transit Network: *(continued)*

BUS TRANSIT PRIORITY [speed & reliability] *(continued)*

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
ACCELERATED			
10. Select near-term HOV lane operating policies to advance to the State.	Mid-2022	MTC, Transit Operators, CTAs	$
11. Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way.	Late 2022	MTC, Caltrans, CTAs, Transit Operators, Cities	$
12. Fund, develop and adopt a Transit Priority Policy and Corridor Assessment for improving bus speed and reliability on high-transit corridors and arterials, including identification of current bus speeds to establish a baseline.	Late 2023	MTC, Caltrans, CTAs, Transit Operators, Cities	$
BUS/RAIL NETWORK MANAGEMENT REFORM			
13. Fund and complete a business case analysis of potential network management reforms, including resource requirements and implementation steps.	Mid-2022	MTC	$
14. Establish and support an MTC advisory group to guide the Network Management Business Case analysis.	October 2021	MTC	$
15. Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiencies initiatives.	December 2021	MTC, CTAs	$
16. Deliver Phase 1 Rail Partnership and Governance Assessment grant by late 2021 and Final Assessment by mid-2023.	Late 2021/ Mid-2023	MTC	$
17. Adopt Transit Equity Principles and a process for applying them.	Mid-2022	MTC, Transit Operators, CTAs	$
CONNECTED NETWORK PLANNING			
18. Fund, develop and adopt a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks (such as Rapid Transit), funding requirements and next steps.	Late 2023	MTC, Transit Operators	$
19. Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local government access plans and policies.	Late 2023	MTC, Transit Operators	$
DATA COLLECTION AND COORDINATION			
20. Establish protocols and implement uniform Realtime and transit pathway data collection as a foundation for providing consistent and accurate customer information.	Mid-2023	MTC, Transit Operators	$

Accessibility: Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.

Network Management Roles & Responsibilities:

- **ACCESSIBLE SERVICES (INCLUDING PARATRANSIT)**
- **CENTRALIZED PROGRAM ELIGIBILITY VERIFICATION**

CURRENT & ONGOING EFFORTS

- Regional Transit Connection card (RTC discount)
- Integration of paratransit on Clipper Next Generation

ACCESSIBILITY

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
21. Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county, consistent with the 2018 Coordinated Plan.	Mid-2022	MTC, Transit Operators, CTAs	$
22. Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips.	Late 2022	MTC, Transit Operators, East Bay, Sonoma County, SF / Peninsula	$ $
23. Identify the next steps for the full integration of ADA-paratransit services on Clipper Next Generation.	Late 2022	MTC, Transit Operators, Paratransit Providers	$
24. Identify key paratransit challenges and recommend reforms through the Coordinated Plan update.	Early 2023	MTC, Paratransit Providers	$
25. Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC).	Late 2022	MTC, Bay Area Partnership Accessibility Committee	$

* Key to Estimated Range of Funding Needs:

$	= $0 - 10 million	$$$$	= $101+ million
$$	= $10 - 50 million	TBD	= Estimate not currently available
$$$	= $51 - 100 million		

Funding: The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

Network Management Roles & Responsibilities:

- **FUNDING ADVOCACY**

CURRENT & ONGOING EFFORTS

- Continue state and federal advocacy efforts for increased transit funding

FUNDING

ACTIONS	Target Completion Date	Action Partners	Estimated Range of Funding Needs*
26. Identify cost-saving efficiencies and network management funding needs as part of business case analysis.	Early 2022	MTC, Transit Operators	$
27. Convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit.	Late 2023	MTC, Transit Operators, CTAs, Stakeholders, the Public, NGOs	$

* Key to Estimated Range of Funding Needs:

$	= $0 - 10 million	$$$$	= $101+ million
$$	= $10 - 50 million	TBD	= Estimate not currently available
$$$	= $51 - 100 million		

TRANSIT TRANSFORMATION ACTIONS SCHEDULE

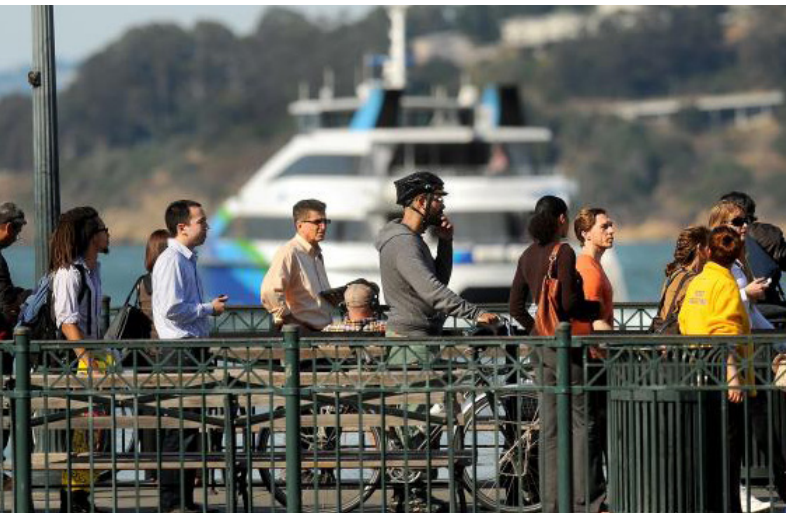
NETWORK MANAGEMENT OUTCOMES		ACTIONS	TARGET COMPLETION DATE										
			2021		2022			2023			2024		
			MID	LATE	EARLY	MID	LATE	EARLY	MID	LATE	EARLY	MID	LATE
FARES AND PAYMENT		1. Act on the FCIS recommendations		X									
		2. Determine whether existing authority is sufficient for FCIS implementation		X									
		3. Seek state legislation for additional authority, if needed				X							
CUSTOMER INFORMATION		4. Fund and finalize regional mapping and wayfinding standards							X				
		5. Fund and complete 1-3 subregional mapping and wayfinding pilot projects											X
		6. Fund and develop a regional mapping data services digital platform								X			
TRANSIT NETWORK	Bus Transit Priority (Speed and Reliability)	7. Request a Caltrans Deputy Directive on Design Exceptions		X									
		8. Sponsor legislation to remove barriers to implementation			X								
		9. Fund design and delivery of prioritized transit corridor projects				X							
		10. Select near-term HOV lane operating policies to advance to the State				X							
		11. Define a Cooperative Agreement process					X						
		12. Fund, develop and adopt a Transit Priority Policy and Corridor Assessment								X			
	Bus/Rail Network Management Reform	13. Fund and complete a Network Management Business Case analysis				X							
		14. Establish and support an advisory group to guide business case	X										
		15. Provide financial incentives for Integration Efficiencies initiatives		X									
		16. Deliver Rail Partnership and Governance Assessment (2 phases)		PH 1					PH 2				
		17. Adopt Transit Equity Principles and a process for applying them				X							
	Connected Network Planning	18. Fund, develop and adopt a Bay Area Connected Network Plan								X			
		19. Adopt a transit hub toolkit to optimize station design and connectivity								X			
	Data Collection & Coordination	20. Establish protocols and implement uniform Realtime and transit pathway data collection							X				
ACCESSIBILITY		21. Designate a Mobility Manager in each county				X							
		22.Fund one-seat paratransit ride pilot projects					X						
		23. Identify steps for ADA-paratransit integration on Clipper Next Generation					X						
		24. Identify paratransit challenges and recommend reforms						X					
		25. Adopt standardized eligibility practices for disability programs					X						
FUNDING		26. Identify efficiencies and network management funding needs			X								
		27. Convene stakeholders to guide transportation funding ballot measure								X			

MOVING FORWARD: NEXT STEPS

Keeping the Momentum

The Bay Area Transit Transformation Action Plan was unanimously approved at the final meeting of the Blue Ribbon Transit Recovery Task Force on July 26, 2021. The Action Plan seeks to advance transit transformation across the entire Bay Area and beyond through near-term actions combined with a commitment from transit operators to continue jointly tackling planning, finance, communication and operational issues related to COVID-19 pandemic recovery.

At the conclusion of its work, the Task Force forwarded to the Commission for consideration a charted path for next steps and future efforts to support the Task Force's vision (at right).



Charting a Path

SUMMER 2021

- Launch of Return-to-Transit Campaign (a communications toolkit developed by MTC and the transit operators to unify return-to-transit messaging delivered by individual agencies through a wide range of channels).

SEPTEMBER 2021

- MTC to consider acceptance of the Bay Area Transit Transformation Action Plan.
- MTC to consider appointing a limited-term (approximately one year) advisory group to work with the consultants to complete a business case analysis of network management alternatives.

OCTOBER – DECEMBER 2021

- MTC workshop to include discussion of Action Plan staffing and funding requirements. Action Plan prioritization and preliminary target dates will be evaluated and refined.
- Convene initial meeting of the Network Management Business Case Advisory Group.
- Kick off business case analysis of network management alternatives.

JANUARY 2022 AND BEYOND

- MTC and transit operators to work on implementing Action Plan items approved by MTC.
- In the first quarter of 2022, MTC will review Action Plan progress.
- Monitor and seek legislation to support the Action Plan.
- Make funding and timing adjustments based on assessment of the efforts.

ACTION PLAN: NEXT STEPS

A Shared Responsibility

This Action Plan is a near-term blueprint for removing barriers that stand in the way of the Bay Area having a world class transit system. It charts the first steps to be taken over the next three years on the path to transit transformation. While the recommendations are directed towards MTC as the convener of the Blue Ribbon Transit Recovery Task Force, its implementation will depend on the cooperation of the 27 transit operators, who each have independent control over their fares, schedules, route design, transfers, communication, and mapping and wayfinding.

Over the long term, achieving transit transformation will require substantial additional funding to provide the level and quality of service needed to attract many more riders. Gaining support for these funding increases, some of which are likely to require support by over two-thirds of voters, will partly depend on the extent to which the region is making demonstrable progress on this Action Plan.

MTC should convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit. Another essential ingredient in the development of a funding plan that can deliver transit transformation will be inclusive and meaningful public engagement, particularly within underserved communities and with Bay Area residents most reliant upon public transit.

The members of the Blue Ribbon Transit Recovery Task Force call upon all parties represented at the Task Force and other interested stakeholders to embrace the recommendations of the Action Plan and to help bring them to fruition. If successful, the Bay Area's future transit riders and those who appreciate the critical role that it serves will look back on this effort as a historic turning point when the region set a new course towards a better, more unified transit system that puts the rider first.

APPENDICES

I. Transformation Action Plan Goals & Objectives

II. Transit Network Management Problem Statement

III. Priority Roles and Responsibilities for Network Management Alternatives Evaluation

IV. Initial Descriptions on Near-term Priority Roles and Responsibilities for Network Management Evaluation

V. Transit Recovery and Transformation: Research Overview and Results

APPENDIX I

TRANSFORMATION ACTION PLAN GOALS & OBJECTIVES

ADOPTED NOVEMBER 16, 2020

Transit Transformation Definition:

Design, adequately invest in and effectively manage a public transit network that is equitable, inclusive, frequent, affordable, accessible and reliable; is integrated with unified service, fares, schedules, customer information and identity; and serves all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

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.

A. Encourage timely additional MTC funding and regulatory relief during the Transit Recovery period.

B. Advocate for timely additional federal and state funding to support Recovery.

C. Receive quarterly Stage 2 updates from Operators and MTC.

D. Support regional funds for inclusive rider research and return-to-transit communications.

GOAL 2: Advance Equity

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

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.

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.

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

B. Using prior MTC analyses and qualified professionals, evaluate regionwide network management alternatives, addressing issues of legal authority, labor, scope of duties, oversight, and increased budget requirements and savings. Recommend near-term reform actions.

C. Using MTC staff and qualified professionals, identify and support near-term consolidation opportunities focused in, but not limited to, smaller transit markets with multiple transit operators to provide a more connected service to the customer, where feasible.

D. Propose state and regional policy and legislative actions to support transit transformation and expedite implementation of transit priority advantages on streets and highways.

APPENDIX I – TRANSFORMATION ACTION PLAN GOALS & OBJECTIVES

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.

A. Receive presentations on several current MTC transit initiatives and comment on their relationship to Management & Governance reforms.

B. Receive state presentation on CalSTA initiatives that inform management and governance reform.

APPENDIX II

TRANSIT NETWORK MANAGEMENT PROBLEM STATEMENT

ADOPTED MARCH 22, 2021

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 megaregion. 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.[1]
- 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, Assemblymember 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 several 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.

Despite 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 mega-regional 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[2], and it is unclear when, and to what extent, ridership will return.

1 MTC – Transit Sustainability Project, May 2012

2 Operator provided information; from BRTF meeting/ December 14, 2020

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Prior to the pandemic, UCLA completed a study for MTC[3] that 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 ridesharing 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 of the factors contributing to transit's ridership decline and equitable access cannot be solved by transit operators alone. Bay Area governments and the planning profession at large have played a central role in systematically denying opportunities to communities 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. 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. In addition, the region's roadway system has insufficient capacity to absorb the traffic increase that would occur with the collapse of transit systems, creating greater travel delay and greenhouse gas emissions.

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, inter-agency travel. Strong collaborative action is needed to restore and grow transit ridership to reach the ambitious targets associated with Plan Bay Area 2050's vision of a more affordable, connected, diverse, healthy, and vibrant Bay Area for all.

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, however this only underscores and deepens 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 and negatively impacting riders.

3 UCLA Institute of Transportation Studies, "What's Behind Recent Transit Ridership Trends in the Bay Area?" February 2020

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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 the pandemic subsides, however, there is also a significant opportunity at the regional scale to create a more efficient, coordinated and customer-friendly system that better serves existing riders and attracts new ones.

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

Organizational/Institutional Challenges

- There is a lack of transit priority on surface roads.[4] 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.
- Network management resources and authority are insufficient to ensure frequent, reliable service to key destinations across boundaries of multiple agencies, with efficient connections at multimodal hubs.
- Cooperation on coordinated approaches across multiple agencies is time-consuming and unpredictable.
- There is a need to improve local school access and inter-agency paratransit service in an effective and efficient manner.[5]
- 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.[6]
- 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.[7]
- Large operators' customers are expressing greater rider health and safety concerns.[8]

4 MTC – Plan Bay Area 2050: A Blueprint for the Bay Area's Future, December 2020

5 MTC – Coordinated Public Transit–Human Services Transportation Plan Update, March 2018

6 MTC Fare Integration Task Force is currently developing a business case and phased implementation recommendation.

7 MTC – Bay Area Core Capacity Study, September 2017

8 BART, Caltrain Rider Surveys

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Past and Current Disparities

- Failed regional housing and development policies have resulted in the displacement of low income residents and people of color to car-dependent communities, reducing full access to economic opportunities due to longer, less convenient, and more expensive mobility options.[9]
- 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

- Bay Area transit agencies are not uniformly funded, creating disparate challenges among operators. Current and future service coordination efforts can only offer limited benefits without additional funding, which has not yet been identified.[10]
- The potential to raise additional needed revenues to advance the transit system and levels of service will be more difficult until an integrated, aligned and coordinated system is in place.
- Integrated local, state and federal transit revenue strategies need to be developed in a regionally supported forum.
- 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.[11]
- Changing current funding levels or priorities cannot be done without understanding difficult tradeoffs.

9 MTC – Plan Bay Area 2040 Equity Analysis, July 2017 / MTC – Plan Bay Area 2050 Equity and Performance Outcomes, December 2020

10 MTC – Transit Sustainability Project, May 2012

11 MTC – Transit Sustainability Project, May 2012

APPENDIX III

PRIORITY ROLES AND RESPONSIBILITIES FOR NETWORK MANAGEMENT ALTERNATIVES EVALUATION

ADOPTED WITH AMENDMENTS MAY 24, 2021

Network Management Outcomes	Roles & Responsibilities[1]
FARES AND PAYMENT: Simpler, consistent, and equitable fares and payment options attract more riders.	• Fare Integration Policy
CUSTOMER INFORMATION: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	• Branding, Mapping and Wayfinding • Marketing / Public Information • Technology and Mobile Standards (Real Time Info)
TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient and reliable network.	• Bus Transit Priority • Connected Network Planning • Station Hub Design Review • Data Collection and Coordination • Capital Project Prioritization • Bus Network Management Reform • Rail Network Management Reform
ACCESSIBILITY: Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.	• Accessible Services (including Paratransit) • Centralized Program Eligibility Verification
FUNDING: The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.	• Funding Advocacy

1 Mega-project Delivery and Oversight was modified by the Task Force to be a consideration but not a focus of the Network Management Alternatives Evaluation. Six additional roles and responsibilities that were considered for Network Management alternatives evaluation but not adopted were: Current Services Coordination, Capital Project Prioritization, Performance Management Standards, Procurement and Contracting, Emergency Coordination, and School Services.

APPENDIX IV

INITIAL DESCRIPTIONS ON NEAR-TERM PRIORITY ROLES AND RESPONSIBILITIES FOR NETWORK MANAGEMENT EVALUATION

REVISED TO REFLECT MAY 24, 2021 TASK FORCE ACTION

To aid in the Blue Ribbon Transit Recovery Task Force's discussion of network management roles and responsibilities, initial descriptions of roles and responsibilities were drafted to clarify and guide feedback during prioritization. Additional definition of the roles and responsibilities will be developed during the business case assessment.

Initial Near-Term Priority Roles and Responsibilities Definitions

Network Management Outcomes	Roles & Responsibilities	Description
FARES AND PAYMENT: Simpler, consistent, and equitable fares and payment options attract more riders.	**Fare Integration Policy**	Findings from the Fare Coordination and Integration Study will guide the implementation recommendations for regional fare integration, with an emphasis on increasing equity and transit ridership. Specific actions are to be determined.
CUSTOMER INFORMATION: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	**Branding, Mapping, and Wayfinding**	Develop new regional standards and processes for creating and deploying new harmonized mapping, wayfinding, and branding products. Processes will streamline and expedite delivery for consistent, comprehensive information at a greatly increased number of transit access points throughout the region. The development of mapping, wayfinding, and branding standards builds on elements of MTC's current effort - the Hub Signage Program. Part of this effort overlays with the "Station Hub Design Review" area to facilitate passenger movements but could also make recommendations to improve physical footprint and transfer path of travel.

Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **CUSTOMER INFORMATION: Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.**	**Technology and Mobile Standards**	Coordination and administration of data and technology standards encompasses both scheduled and real-time passenger information standards, implemented through core and extended GTFS and GTFS-Realtime standards. Coordination with state initiatives and neighboring regions can be done if relevant. Work elements may include support for creation of GTFS and GTFS-Realtime feeds for agencies that do not have them and ongoing technical assistance with data feeds such as testing, validation, and QA/QC.
	Marketing/Public Information	Regional collaboration on marketing campaign creation and promotion to ensure consistent messaging across all Bay Area transit operators. This may also include market research efforts that are conducted on a regular basis in order to establish regional comparative data.
TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	**Bus Transit Priority**	The focus of this work is on projects, programs and policies that enable buses to achieve travel time benefits over private automobiles. Specific areas may include dedicated transit lanes, bridge approaches, and regional and local arterials; bus-on-shoulder; connections to intermodal transit stations; and buses on HOV/Express Lane facilities. Projects may be advanced on either Caltrans ROW and/or local city streets. This effort may also establish common standards for signal priority equipment and software. Advancing CEQA *(continued on next page)*

Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.**	*(continued)* **Bus Transit Priority**	*(continued)* Streamlining legislation (such as extending and broadening SB 288) would serve to remove project implementation barriers, particularly in relation to transit priority.
	Connected Network Planning	The structure of transit service delivery varies throughout the Bay Area and the pressures on local decision makers to be responsive to local transit demand make it difficult to coordinate a multi-agency view of how cross jurisdictional trips might be better served on a joint basis. The design of the existing Bay Area transit network could be improved with a focused multi-agency effort on regional and subregional service planning to deliver an effective transit system that can attract more riders and be more reliable, connected, and customer oriented. Elements of this work could include express bus network planning, identification of regional routes, gap identification for interjurisdictional trips, operating and capital connectivity improvements at intermodal hubs and beyond.
	Station Hub Design Review	Part of this effort overlays with the "Branding, Mapping and Wayfinding" area to facilitate passenger movements but could also make recommendations to improve physical footprint and transfer path of travel. Major capital projects and station access improvements must be informed by, coordinated with, and supported by the surrounding community. The intent is to plan *(continued on next page)*

Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
(continued) **TRANSIT NETWORK: Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.**	*(continued)* **Station Hub Design Review**	*(continued)* and design hubs for ease of use and navigation so that wayfinding becomes more intuitive and effective and connected with the community.
	Data Collection and Coordination	Better define data standards, develop common data definitions, and enhance regional data clearinghouse efforts to better make data available to both the region and operators for local and regional network management and coordination.
	Capital Project Prioritization	Based on projects identified in the adopted Plan Bay Area 2050 Blueprint, assess, identify, and prioritize transit capital projects for funding and development.
	Bus Network Management Reform	Develop a transit network management business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation. Bus will be one component of the larger regional transit network analysis.
	Rail Network Management Reform	Develop a transit network management business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation. Rail will be one component of the larger regional transit network analysis. Through a Caltrans Sustainable Communities Grant, MTC may develop a rail focused analysis that would feed into the Transit Network Management business case assessment.

APPENDIX IV

Initial Near-Term Priority Roles and Responsibilities Definitions (continued)

Network Management Outcomes	Roles & Responsibilities	Description
ACCESSIBILITY: Transit services for older adults, people with disabilities, veterans and those with lower incomes are coordinated efficiently.	**Accessible Services (including Paratransit)**	Reduce barriers between different types of services for older adults and persons with disabilities, including both fixed-route and paratransit services. Special consideration should be given to service and public transit infrastructure around destinations frequented by passengers with accessibility needs. Pilot projects should be explored at the regional and subregional levels to determine functional best practices and ensure program designs are sustainable.
	Centralized Program Eligibility Verification	Cost effectively determining eligibility for ADA paratransit service, age/income based programs, and other eligibility-based policies through a centralized regional provider. Once verified by the central provider, operators need to be able to confirm individual program eligibility and conditions/restrictions without additional effort from the passenger.
FUNDING: The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.	**Funding Advocacy**	Secure existing and new revenue to assist in the advancement of transit initiatives, the sustainability of transit, and implementation of recommendations from the Blue Ribbon Transit Recovery Task Force.

Blue Ribbon Task Force
Transit Recovery & Transformation: Research Overview & Results

EMC research

EMC Research, Bay Area Council, & MTC Staff
May 27, 2021

Return to Transit Campaign Update

- MTC and transit operator marketing staff are developing a Return to Transit Communication Campaign that will include print, digital, social media and audio advertising.
- Craft + Commerce, MTC's marketing contractor, developed five campaign concepts that were narrowed down to three.
- EMC Research is message testing the three concepts; Imprenta Communications, an ethnic communications firm, is testing the concepts in Spanish, Chinese, Vietnamese and Tagalog.
- Testing will be completed in early June. The three campaigns will be narrowed down to one.
- Campaign will be built out by early July and promoted in summer or fall.

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Blue Ribbon Research Overview

- Since mid-2020, EMC Research and Bay Area Council have been providing public opinion and employer research support
- Research efforts have included:
  - Two reviews of prior opinion research conducted in the Bay Area
  - Two rounds of community focus groups (most recent round in April, in English, Spanish, Cantonese, and with persons with disabilities)
  - Statistically valid random sample poll of 1,000 Bay Area residents (mid-April)
  - Employer focus groups and monthly return to workplace tracking surveys (April - September)
- Bay Area Resident Poll & Community Focus Groups designed to:
  - Understand transit perceptions and expectations for the future
  - Measure interest in more integrated Bay Area public transit & Seamless bill
  - Gauge reaction to issues addressed by network management

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

Please note that due to rounding, percentages may not add up to exactly 100%.

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Summary of Research Findings

EMC research

- Bay Area residents, both transit riders and not, were not satisfied with public transit prior to the pandemic, and **they demand better and encourage that now is the time to act**. Reliability, frequency, ease of use, and personal safety on board are all viewed as inadequate.
- Most Bay Area residents (87%) believe public transit is important to the Bay Area. **Reliable, frequent, and safe transit for the Bay Area** is a priority for nearly everyone, whether they ride or not.
- Coordinated public transit that operates as a **seamless, multimodal transit system** for the Bay Area is overwhelmingly popular (89% support). Support is high across riders and non-riders, and all regions of the Bay Area.
- Bay Area residents all want the same things, including **real-time information**, better transit for **dependent populations**, more **direct service** with fewer transfers, a single **mobile app**, uniform **maps and signage**, a single **set of fares, passes, and discounts**, and a **regional network** that can set fares, align schedules, and standardize information.

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EMC research

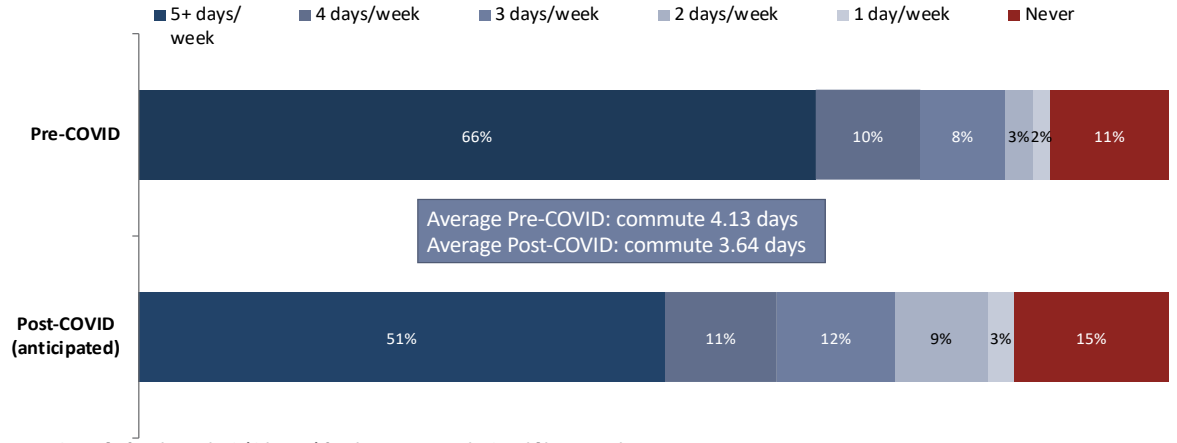
Commute Frequency & Transit Use

Commute Frequency *(all modes)*

EMC research

Commuters anticipate heading to the workplace fewer days a week than they did prior to the pandemic.

(Among employed/students only – 69% of residents)



Q50, Q51 & Q52. [Before the pandemic/right now/after the COVID-19 pandemic ends] how many days per week [did/do/do you anticipate that you will] commute or go into a workplace?

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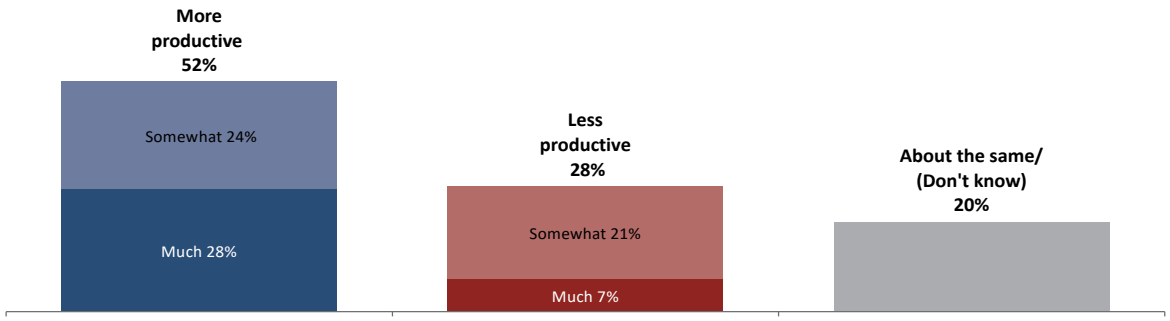
Work from Home

There is evidence that employees are not particularly unhappy in their work at home environment.

How would you rate your productivity working at home?*

Among employed working from home always or sometimes; n=430



* Question from Bay Area Council Bay Area Poll – March 2021

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Employer Return to Office

Employers surveyed are anticipating their employees will generally spend fewer days in the office post-COVID than they did prior.

Most employers anticipate beginning to bring non-essential employees back to offices in late summer/early fall. A majority think their "new normal" will be in place by mid-fall, while about a third felt it might be closer to the end of the year, or even early 2022.

Most employers surveyed support the use of public transit as a way for their employees to commute to the workplace.

In addition to COVID safety concerns, employers want improved efficiencies in the transit system such as improved reliability, more service, and reduced wait times.

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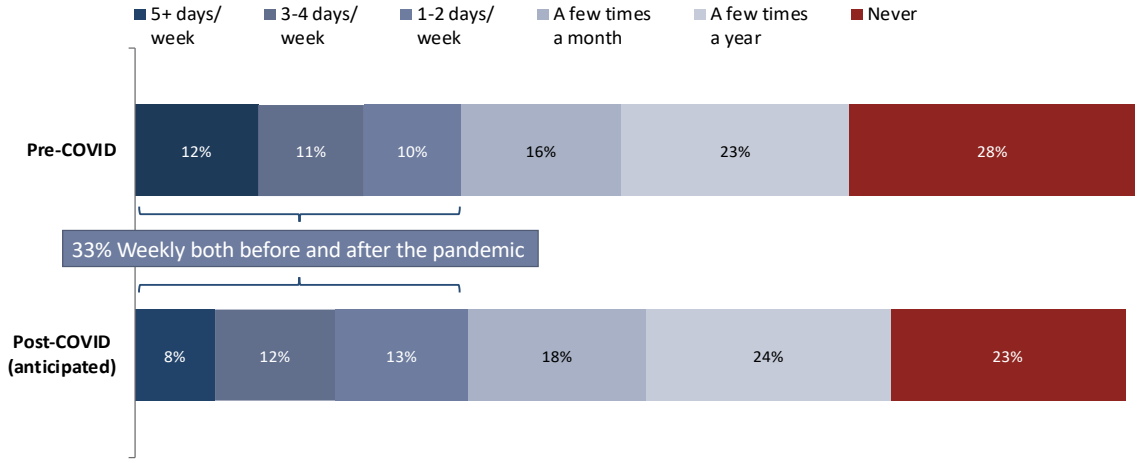
Transit Usage

EMC research

The one-third of Bay Area residents that were regular transit riders before COVID anticipate returning, although maybe with less frequency.



Q45, Q47 & Q48. [Before the COVID-19 pandemic/currently/after the COVID-19 pandemic ends] how many days per week [did/do/do you think you will] take public transit?

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Focus Groups: Transit & Commuting

EMC research

Focus group participants generally felt they would return to transit when they went back to their regular activities.

"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**."

-- Pre-pandemic transit rider

"Once I feel that everything is safe, I will be going back to using the Caltrain, not as often, just because our workplace has expressed the idea of maybe doing **part-time remote and then part-time in the office.**"

-- Pre-pandemic transit rider

"I haven't taken BART since March (2020), but **I have every intention**, post vaccine rollout, post normalcy **to return to taking BART**."

-- Pre-pandemic transit rider

"I would love to be able to go to a Giants game, go to the museums, go to the concerts and the things that I used to go to with other people. That's just what I'm waiting for, **venues and things like that to open up again**."

-- Pre-pandemic transit rider

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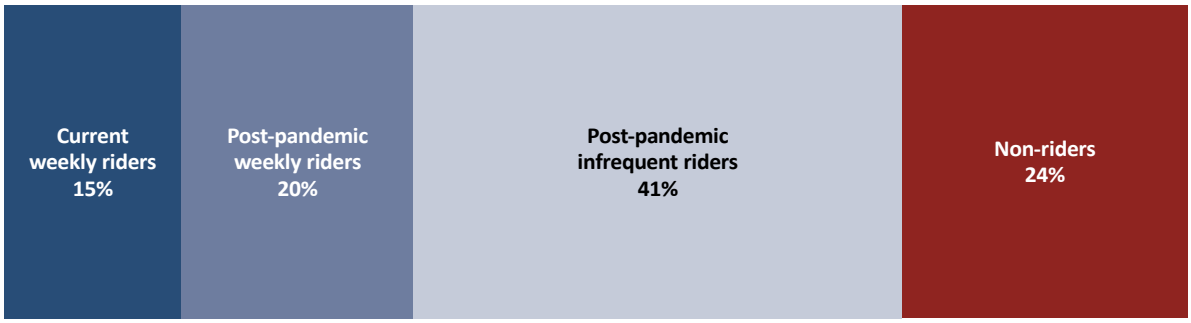
Transit Usage Groupings



Current Weekly Riders: *Currently taking transit at least once a week*
Post-pandemic Weekly Riders: *Anticipate taking transit* ***at least*** *once a week post-pandemic*
Post-pandemic Infrequent Riders: *Anticipate taking transit* ***less than*** *once a week post-pandemic (but more than never)*
Non-Riders: *Do not anticipate taking transit at all post-pandemic*

Segmentation created from questions 47-48.

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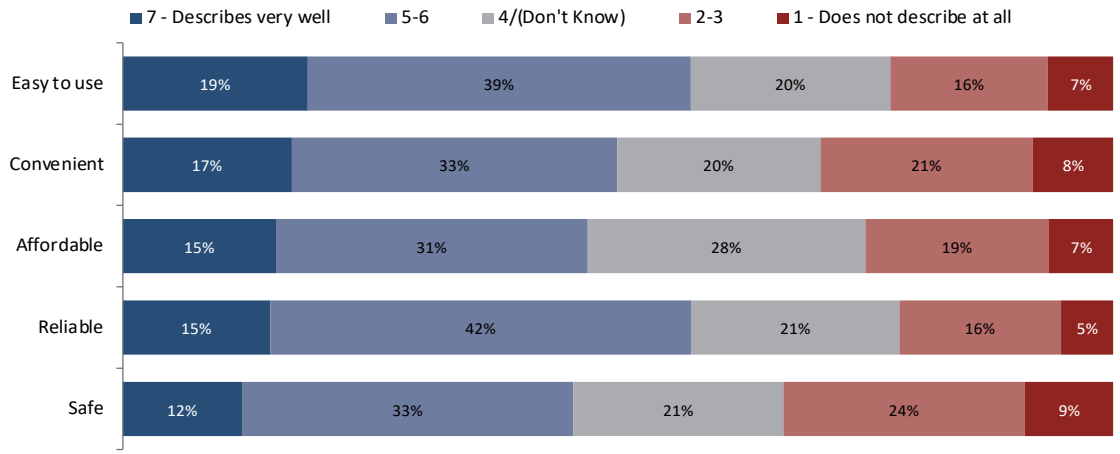
Transit Perceptions

Pre-COVID Transit Perceptions

EMC research

Bay Area residents were not particularly positive about transit before the pandemic.



Q5-Q9. How well does each of the following describe public transit in the Bay Area before the pandemic?

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Focus Groups: Transit Perceptions

EMC research

Riders in the focus groups had a range of concerns about public transit in the Bay Area.

"**It would be safer if it was on time.** Transit is not on time. You just wait on the street, wait for the bus before you get on. Someone already robbed you."

-- CBO focus group participant (Cantonese language group)

"BART is nasty and grimy, anyway. So it's like, **if you can survive a BART train, you'll survive COVID.**"

-- Pre-pandemic transit rider

"**Paying all the different prices and figuring out every different schedule is kind of a lot** for someone who solely uses public transportation."

-- CBO focus group participant (English language group)

"If I miss my ferry **I don't want to have to pay extra cash to jump on another mode of transportation.**"

-- CBO focus group participant (English language group)

"The rate of the AC Transit kept going up year by year, even though I'm a senior and I'm on a fixed income. So the increase in that and the increase in BART fares also deeply affected me. **It is becoming more difficult to be able to afford transit."**

-- CBO focus group participant (English language group)

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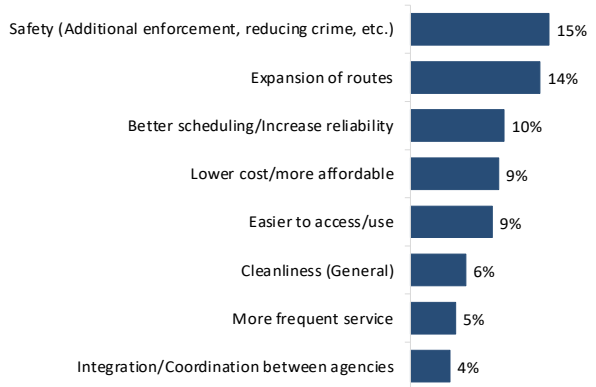
Future Transit Improvements: Top Responses

EMC research

Nearly all Bay Area residents could name something they would like improved about Bay Area transit, with safety, convenience, reliability and affordability mentioned frequently.

What specific improvements to public transit in the Bay Area do you think we should make today that future generations will thank us for tomorrow?



Only 16% of residents were unable to offer a suggestion on how to improve public transit in the Bay Area

Q15.

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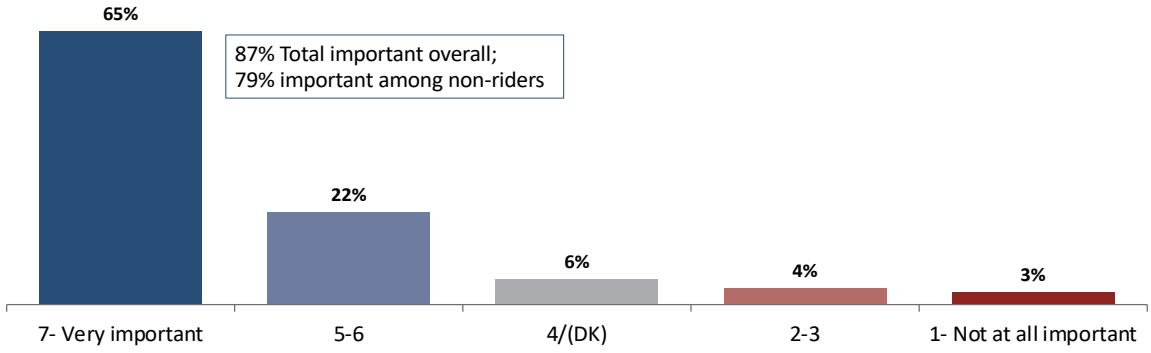
Importance of Transit to the Bay Area

EMC research

Public transit is seen as important for the Bay Area by nearly everyone, including those who don't ride transit.

Overall, how important is public transit for the Bay Area?



Q4.

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Focus Groups: Importance of Transit

EMC research

Focus group participants talked about the importance of transit both to their own lives but also to the entire area. The connection of better transit to the environment was a common theme as well.

"We need to have a **multimodal system that services the entire region**, we need to have paratransit, we need to have rail, we need to have buses, we need to have shuttles…we need to have all kinds of modes of travel and we need to have service that goes where people need to use the service, we need reliable service, we need frequent service."

-- CBO focus group participant (Persons with disabilities group)

"Now, gas is very expensive. Also, people don't drive. And when it comes environmental protection, less driving is less emission, it's better for air quality. We're all getting old. **We need public transit.** That's part of our daily living."

-- CBO focus group participant (Cantonese language group)

"So we get people back on public transit, rather on cars and stuff that **it would be healthier for us, it's healthy for our children and our future**, and it would be more convenient as well."

-- CBO focus group participant (English language group)

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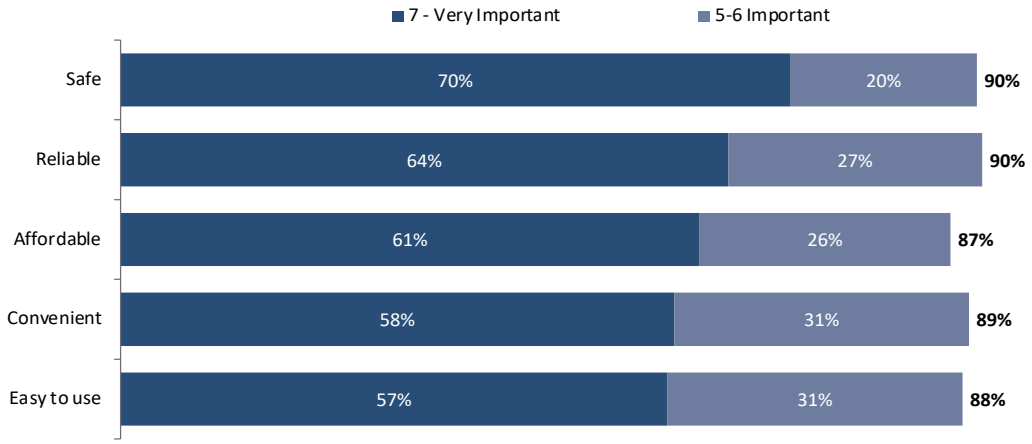
Post-COVID Transit Importance

EMC research

Bay Area residents place a high value on public transit system that is easy to use, convenient, affordable, reliable, and safe.



Q10-Q14. Now think about the future of public transit following the COVID-19 pandemic. For each of the following, please tell me how important they are to the future of the Bay Area's public transit system.

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EMC research

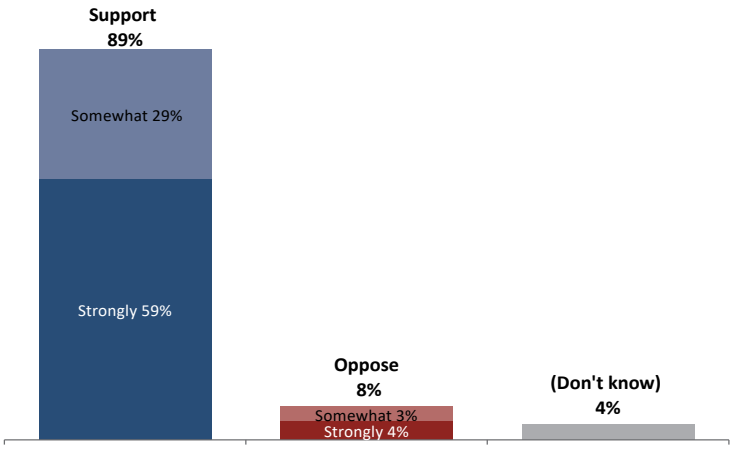
Bay Area Seamless and Resilient Transit Act

Support for Seamless Concept

EMC research

Support for the idea of better coordinated seamless transit for the Bay Area is nearly universal.

A bill has been introduced in the state legislature called the **Bay Area Seamless and Resilient Transit Act**. This bill would coordinate all of the public transit systems in the Bay Area to operate as one seamless, multimodal transit system, including consistent mapping and signage to make transit easier to navigate, regional fares so riders pay one fare for their entire trip even if they have to transfer, and real-time vehicle location data so riders know when a bus, train, or ferry will arrive.

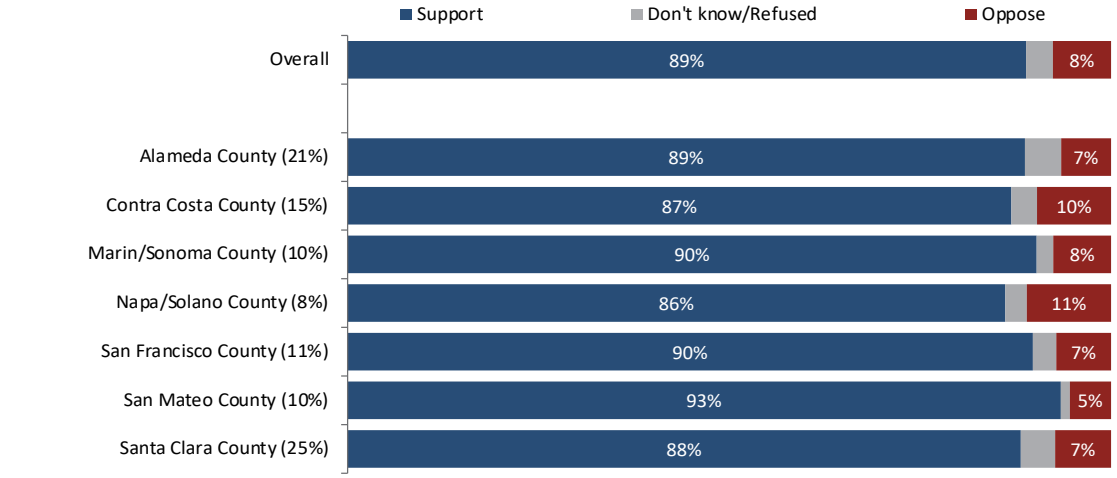


Q16. Given what you just heard, do you have support or oppose the Bay Area Seamless and Resilient Transit Act?

21-8062 MTC BRTF Transit Recovery & Transformation | 20

Support by Region

The idea is supported across the entire Bay Area.



Q16. Given what you just heard, do you have support or oppose the Bay Area Seamless and Resilient Transit Act?

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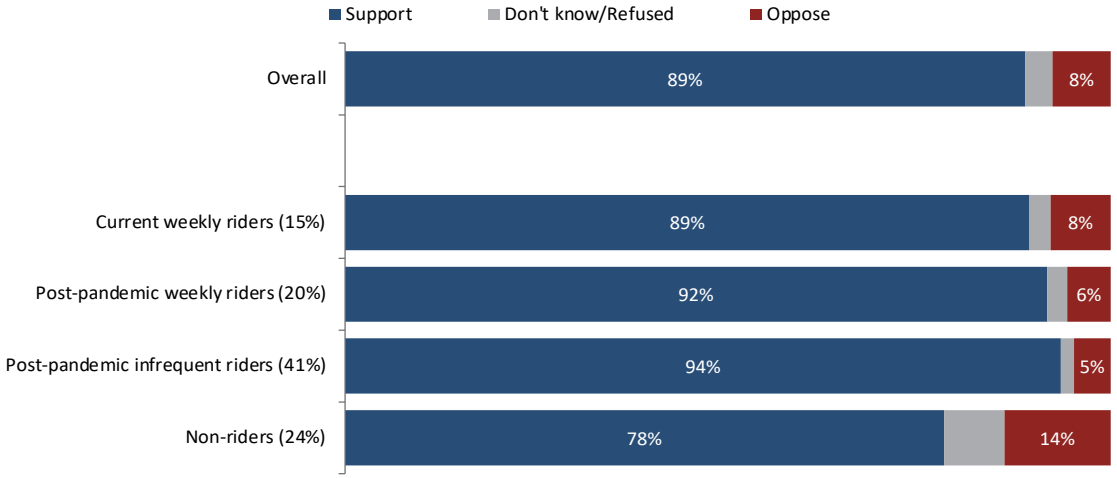
Support by Transit Ridership

Current transit riders, future transit riders, and non riders all support the idea by wide margins.



Q16. Given what you just heard, do you have support or oppose the Bay Area Seamless and Resilient Transit Act?

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Focus Groups: Support for Integrated System

EMC research

Focus group participants groups felt a more integrated system would help them get where they are going more easily, comfortably, and quickly.

"When you say integrated, it sounds like if a lot of the agencies kind of work together to make sure that their riders are happy and that they're comfortable and that they're safe…they're doing a service for the Bay Area, so **they should all kind of be on the same page**."

-- CBO focus group participant (English language group)

"I think if there was an integrated system, **more people would use it**. "

-- CBO focus group participant (Spanish language group)

"VTA has a totally different system than BART. And then…San Mateo has a different system and they're all…taking people to work in San Francisco so **they should be synchronized**."

-- CBO focus group participant (English language group)

"I think that it would be good if they were to **make connections in different locations and connect them all** so that people who take them, it'll be more accessible for them. That way they can know all of the options…and they would know how to…transfer from the bus to the train and get to the place where they have to go.

-- CBO focus group participant (Spanish language group)

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Elements of Seamless

EMC research

Bay Area residents all want the same things:

- 92% find real-time information on wait times and vehicle locations important
- 91% - 93% find better transit for dependent populations important
- 91% find more direct service, fewer transfers, and shorter wait times important
- 88% find a regional network that can set fares, align routes and schedules, and standardize information important

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Elements of Seamless

EMC research

Bay Area residents all want the same things:

- 92% find easy to use and uniform maps and signage important
- 90% find a single mobile app for planning, schedules, and information important
- 89% find a single set of fares, passes, discounts, and transfer policies important
- 80% find dedicated travel lanes along key transit routes for buses and carpools important

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Focus Groups: Elements

EMC research

Focus group participants were particularly enthusiastic about fare, schedule, and information coordination.

"I would love to see all the systems working with each other, I would love to see **fares working with each other** so that it's not a major mess to try to go on nine different systems with nine different fares."

-- CBO focus group participants (Persons with disabilities group)

"Let people know what direction buses and transit is going and **how long it would take** for those systems to arrive at that point and **how frequently it will get to you.**"

-- CBO focus group participants (English language group)

*When asked if they liked the idea of **paying just one fare** to get to their destination even if they took multiple modes:*

"That sounds like a dream come true"
"That would be excellent"
"Tell us when that's going to happen"

-- CBO focus group participants (Spanish language group)

"I'm thinking, if I could get to that job with only one bus or maybe one transfer in under two hours that would be nice. But if I have two, three different ones, and **if it takes me anything over an hour, it's a lost cause. Forget it.**"

-- Pre-pandemic transit rider

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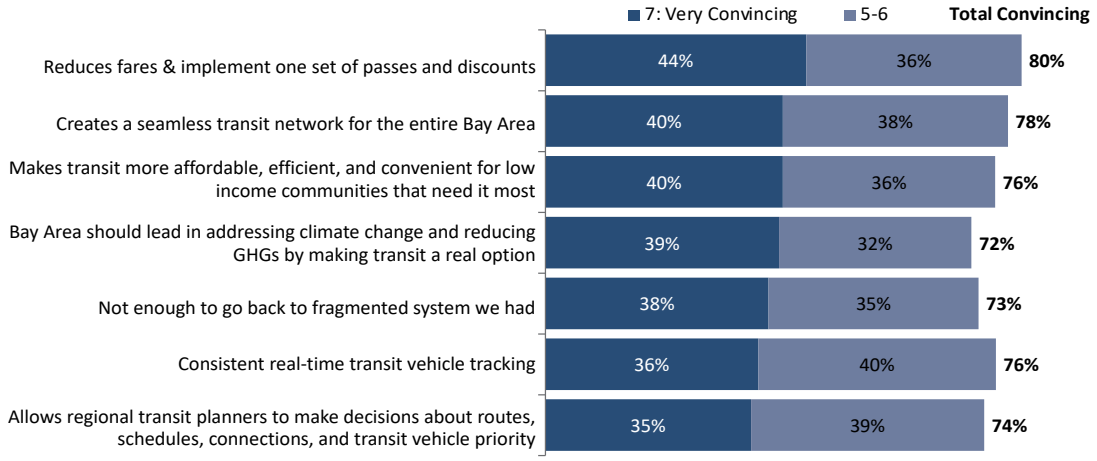
Impact of Additional Information

Outcomes of the proposal are compelling.



** Wording of questions condensed for presentation purposes: full statements available in topline report.*

Q30-36. How convincing is each statement is to you as a reason to support the Bay Area Seamless and Resilient Transit Act? 21-8062 MTC BRTF Transit Recovery & Transformation | 27

Focus Groups: Elements

Focus group participants were particularly enthusiastic about fare, schedule, and information coordination.

"I would love to see all the systems working with each other, I would love to see **fares working with each other** so that it's not a major mess to try to go on nine different systems with nine different fares."

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"Let people know what direction buses and transit is going and **how long it would take** for those systems to arrive at that point and **how frequently it will get to you.**"

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-- Pre-pandemic transit rider

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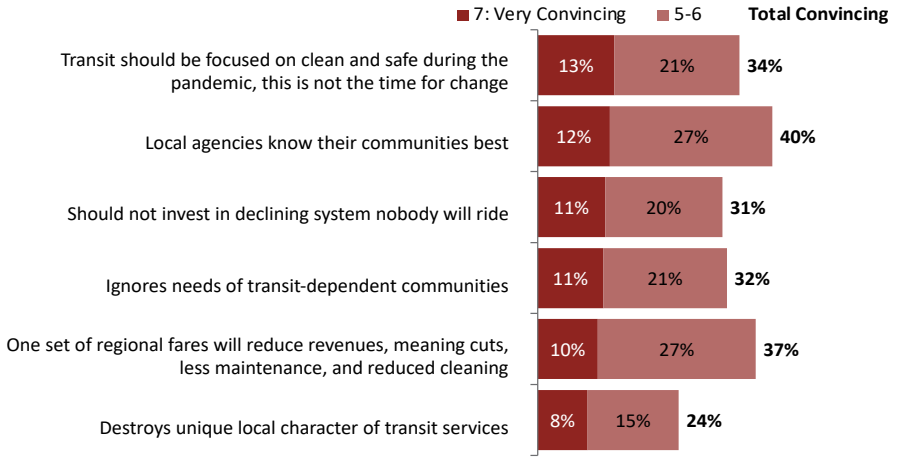
Impact of Counter Information

EMC research

Information against the idea of integrated regional transit has limited impact.



** Wording of questions condensed for presentation purposes: full statements available in topline report.*

Q38-43. How convincing is each statement is to you as a reason to oppose the Bay Area Seamless and Resilient Transit Act? 21-8062 MTC BRTF Transit Recovery & Transformation | 29

Focus Groups: Concerns

EMC research

There were some concerns from focus group participants about implementation and unintended consequences.

"Negative things will be people, they go short distance, they have to **pay more, be more expensive**."

-- CBO focus group participants (Cantonese language group)

"Transit agencies have a habit of only caring about the choice riders. I think **transit dependent riders should be front and center**."

-- CBO focus group participants (Persons with disabilities group)

"What I'm afraid that might happen is if this network integration happens, **we better not make some bad precedent** or do something wrong, that has something really crappy baked into it, that is really hard to get out."

-- CBO focus group participants (Persons with disabilities group)

"You can look the old BART (online) platform. It basically just was an app, but it just pulled up the old school web page, so **it didn't really actually provide any real specifically helpful things.**"

-- CBO focus group participants (English language group)

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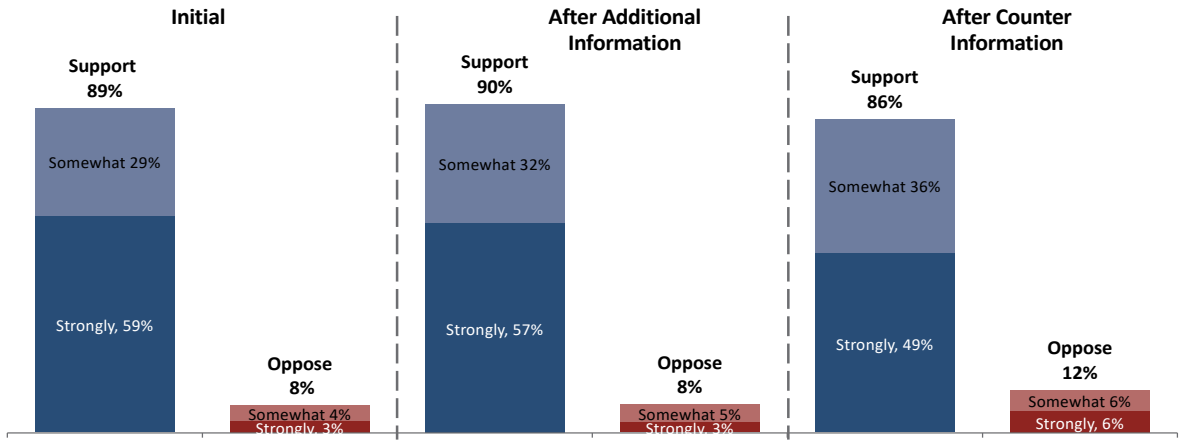
Seamless Support Progression

Additional information about the issue does little to impact support for the idea.



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Conclusions

- Transit riders in the Bay Area do anticipate returning to transit
- Return to normal may take months, and many anticipate reducing their number of days in the office
- Residents, including non-transit users, place a high value on a quality public transit system
- There is near universal desire to see significant improvements in public transit including around fare structures, frequency, connectivity, and availability of information
- Transit-dependent residents are especially eager to see changes

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APPENDIX V – TRANSIT RECOVERY AND TRANSFORMATION: RESEARCH OVERVIEW AND RESULTS

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BLUE RIBBON

TRANSIT RECOVERY TASK FORCE

TRANSIT TRANSFORMATION ACTION PLAN

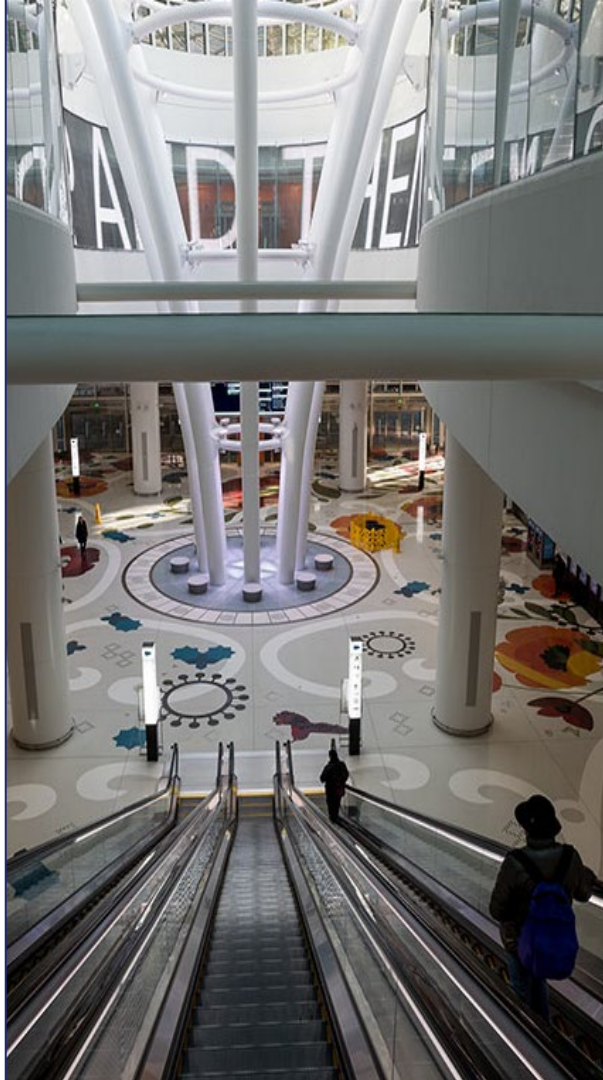
Operations Committee

September 10, 2021

BLUE RIBBON TRANSIT RECOVERY TASK FORCE

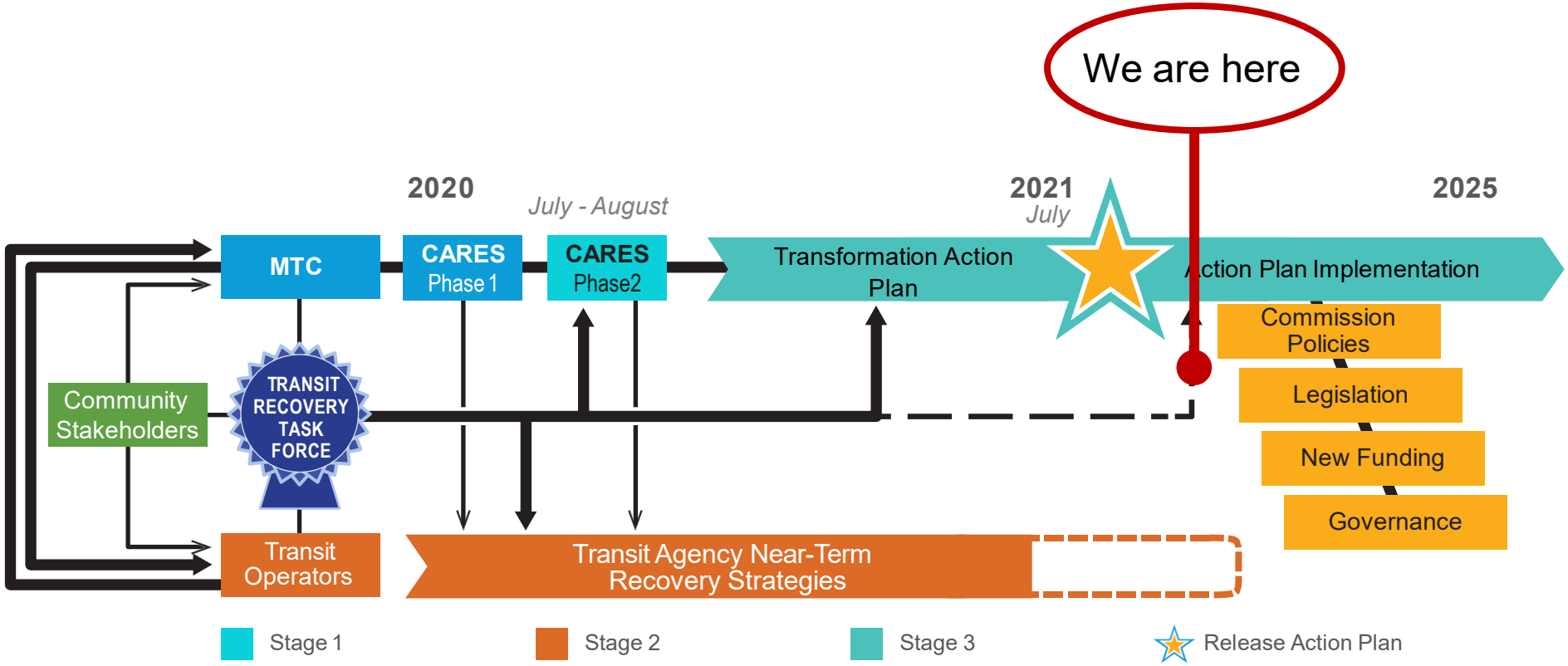
Appointed by MTC in April 2020 to guide the Bay Area's transit system recovery in response to the COVID-19 pandemic

- 32 members composed of representatives from the State, MTC Commission, transit operators, and stakeholder groups:
- CalSTA Secretary David Kim
- State Senator Dave Cortese
- Assemblymember David Chiu
- 8 MTC Commissioners and MTC Executive Director
- 10 Transit Agency General Managers
- 10 stakeholders representing the interests of labor, business, transit & social equity advocacy organizations, and persons with disabilities
- A representative of the county transportation agencies



TASK FORCE TIMELINE

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE



TASK FORCE PURPOSE

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE

STAGE 1 SURVIVAL

Assist in distribution of $500 million in remaining federal Coronavirus Aid, Relief, and Economic Security (CARES) Act relief funds.

STAGE 2 RECOVERY

Support operators' recovery planning.

- Healthy Transit Plan
- Return to Transit Campaign
- Public Opinion Research
- Operator Collaboration and Immediate Response

STAGE 3 TRANSFORMATION

Develop a Bay Area "Transit Transformation" action plan identifying actions needed to reshape the region's transit system into a more connected, more efficient, and more user-focused mobility network across the entire Bay Area and beyond.

APPROVED GOALS
(November 2020)

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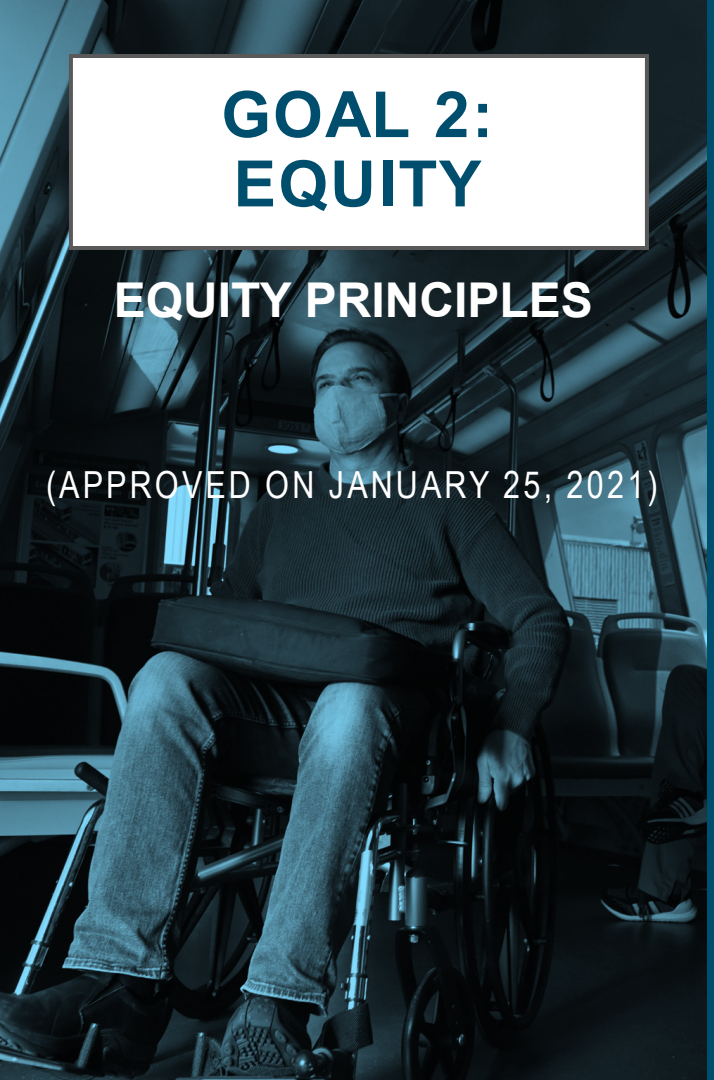
TRANSIT RECOVERY TASK FORCE

1 **Goal 1: RECOVERY**
Recognize critical recovery challenges facing transit agencies

2 **Goal 2: EQUITY**
Advance equity

3 **Goal 3: NETWORK MANAGEMENT & GOVERNANCE**
Identify near-term actions to implement beneficial long-term Network Management & Governance reforms

4 **Goal 4: CURRENT INITIATIVES**
Establish how current MTC and state transit initiatives should integrate with Network Management & Governance reforms



GOAL 2: EQUITY

EQUITY PRINCIPLES

(APPROVED ON JANUARY 25, 2021)

1. 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.

2. INCREASE ACCESSIBILITY

Increase transit access, prioritize service investments, and improve travel experiences for seniors and riders with disabilities and/or low incomes by increasing fare affordability and service connectivity.

3. 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.

4. 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.

5. 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.

TRANSIT TRANSFORMATION

Design, adequately invest in and effectively manage a public transit network that is equitable, inclusive, frequent, affordable, accessible and reliable; is integrated with unified service, fares, schedules, customer information and identity; and serves all Bay Area populations, resulting in increased transit ridership and reduced growth in vehicle miles traveled.

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TRANSIT RECOVERY TASK FORCE

ACTION PLAN

Bay Area Transit Ridership (all operators)

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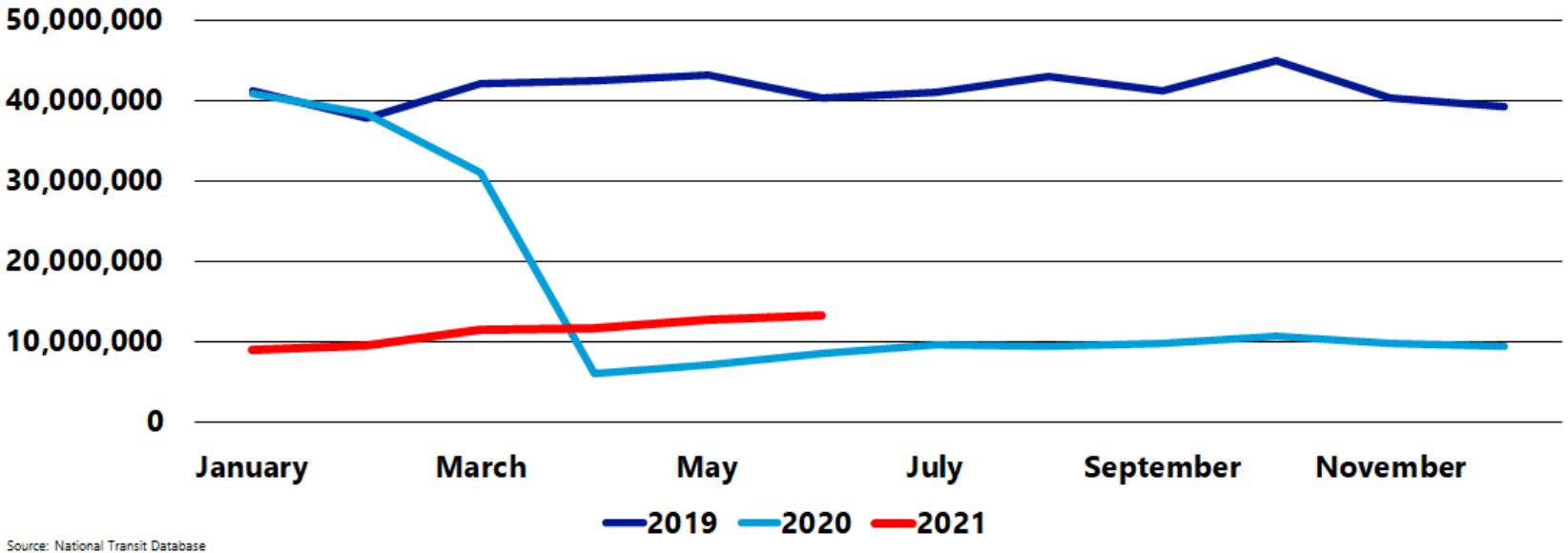
TRANSIT RECOVERY TASK FORCE

June 2021 Ridership Down 67% from Pre-COVID-19 Levels

Ridership remains depressed from a 2019 average of over 40 million trips per month, to 13 million trips in June 2021. Since June, most operators are reporting continuing increases in ridership.



Source: National Transit Database

CHALLENGES TOWARDS IMPROVING RIDERSHIP

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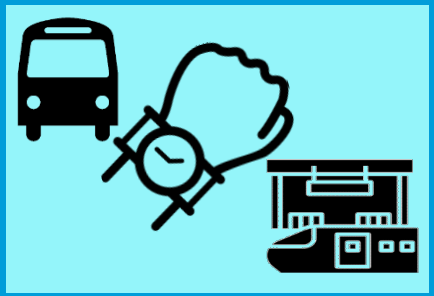
TRANSIT RECOVERY TASK FORCE

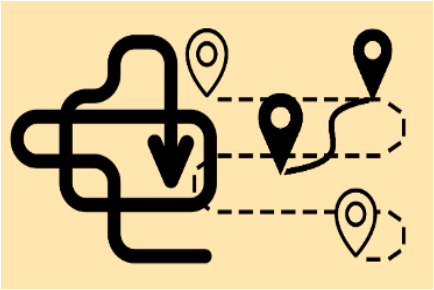
Customer Experience

Roadway Congestion Impacts on Transit

Usability

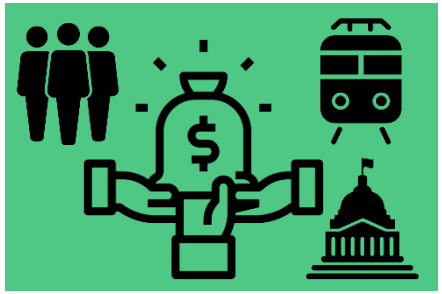


Network Gaps and Connectivity



Organizational and Institutional Challenges

Past and Current Disparities



Costs and Insufficient Funding

OUTCOMES

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TRANSIT RECOVERY TASK FORCE

I. Fares and Payment	II. Customer Information	III. Transit Network	IV. Accessibility	V. Funding
Simpler, consistent, and equitable fare and payment options attract more riders.	Integrated mapping, signage and real-time schedule information makes transit easier to navigate and more convenient for both new and existing riders.	Bay Area transit services are equitably planned and integrally managed as a unified, efficient, and reliable network.	Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.	The Bay Area's transit system uses its existing resources more efficiently and secures new, dedicated revenue to meet its capital and operating needs.

ACTION PLAN KEY ELEMENTS

- Expanded collaboration between transit operators and with partners is essential
- Actions are keyed to Outcomes
- Focused on near-term actions (approx. 1-3 years) leading toward Transit Transformation
- Requires alignment on existing regional funding and new funding
- The Action Plan is ambitious, and the target completion dates are preliminary and subject to continued evaluation and refinement

TRANSFORMATION ACTION PLAN: **ACCELERATED ACTIONS**

BLUE RIBBON TRANSIT RECOVERY TASK FORCE

I. FARES AND PAYMENT

Fare Integration Policy

1. Act on the Fare Coordination and Integration Study (FCIS) recommendations, including selecting and funding pilot projects, **by December 2021**.
2. Determine whether existing authority is sufficient to support uniform implementation of FCIS recommendations **by December 2021**.
3. Seek state legislation for additional authority, if needed, to ensure uniform and timely implementation of FCIS recommendations **by mid-2022**.

II. CUSTOMER INFORMATION

Mapping and Wayfinding

4. Fund and finalize regional mapping and wayfinding standards for application across all operator service areas **by mid-2023**.
5. Fund and complete 1-3 consistently branded North and East Bay subregional mapping and wayfinding pilot projects and adopt timeline **by late 2024** for subsequent regionwide deployment across all service areas.
6. Fund and develop a regional mapping data services digital platform, to enable the standardization and routine updating of digital and paper maps across all transit services **by late 2023**.

TRANSFORMATION ACTION PLAN: **ACCELERATED ACTIONS**

BLUE RIBBON TRANSIT RECOVERY TASK FORCE

III. TRANSIT NETWORK

Bus Transit Priority (speed & reliability)

7. Request a Caltrans Deputy Directive that expedites State right-of-way bus priority Design Exceptions **by December 2021**.
8. Sponsor legislation to remove barriers to transit priority implementation **by early 2022**.
9. Fund the design and delivery of prioritized near-term transit corridor projects **by mid-2022**.
10. Select near-term HOV lane operating policies to advance to the State **by mid-2022**.
11. Define a Cooperative Agreement process that expedites travel time improvements on arterials and bus rights-of-way **by late 2022**.
12. Fund, develop and adopt a Transit Priority Policy and Corridor Assessment for improving bus speed and reliability on high-transit corridors and arterials, including identification of current bus speeds to establish a baseline, **by late 2023**.

TRANSFORMATION ACTION PLAN: **ACTIONS**

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE

III. TRANSIT NETWORK

Bus/Rail Network Management Reform

13. Fund and complete a Business Case analysis of potential network management reforms, including resource requirements and implementation steps, by mid-2022.
14. Establish and support an MTC advisory group to guide the Network Management Business Case analysis by October 2021.
15. Provide financial incentives for Solano and Sonoma counties to complete their Integration Efficiencies initiatives by December 2021.
16. Deliver Phase 1 Rail Partnership and Governance Assessment grant by late 2021 and Final Assessment by mid-2023.
17. Adopt Transit Equity Principles and a process for applying them by mid-2022.

Connected Network Planning

18. Fund, develop and adopt a Bay Area Connected Network Plan that includes transit service and hub categories, core service networks (such as Rapid Transit), funding requirements and next steps by late 2023.
19. Adopt a transit hub toolkit to optimize station design and connectivity that includes coordination with local government access plans and policies by late 2023.

Data Collection and Coordination

20. Establish protocols and implement uniform Realtime and transit pathway data collection as a foundation for providing consistent and accurate customer information by mid-2023.

TRANSFORMATION ACTION PLAN: **ACTIONS**

BLUE RIBBON
TRANSIT RECOVERY TASK FORCE

IV. ACCESSIBILITY

21. Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county, consistent with the 2018 Coordinated Plan, **by mid-2022**.
22. Fund additional subregional one-seat paratransit ride pilot projects and develop cost-sharing policies for cross jurisdictional paratransit trips **by late 2022**.
23. Identify next steps for the full integration of ADA-paratransit services on Clipper Next Generation **by late 2022**.
24. Identify key paratransit challenges and recommend reforms through the Coordinated Plan update **by early 2023**.
25. Adopt standardized eligibility practices for programs that benefit people with disabilities (paratransit and Clipper RTC) **by late 2022**.

V. FUNDING

26. Identify cost-saving efficiencies and Network Management funding needs as part of Business Case analysis **by early 2022**.
27. Convene stakeholders to identify priorities and a funding framework for a transportation funding ballot measure that includes new funding for transit **by late 2023**.

NEXT STEPS

BLUE RIBBON
TRANSIT RECOVERY
TASK FORCE

SEPTEMBER 2021

- Commission to consider acceptance of the Action Plan
- Commission establishes Network Management Business Case advisory group

OCTOBER 2021 AND BEYOND

- **Transformation Action Plan Implementation**
  - **October Commission workshop:** Provide direction on funding and staff resources needed to implement Action Plan
  - Fund and initiate prioritized Action Plan projects
- **Network Management Business Case**
  - Consultant contract for Network Management Business Case analysis
  - Convene First meeting of Network Management Business Case advisory group

THANK YOU.