Date: February 24, 2010
W.I.: 1227
Referred By: Operations Committee
Revised: 10/26/11

ABSTRACT

Resolution No. 3866

This resolution updates and adopts MTC's Transit Coordination Implementation Plan pursuant to the requirements of California Government Code §§ 66516 (SB 1474) and 66516.5; Public Utilities Code §§ 99282.5l and 99314.7; and Streets and Highways Code § 30914.5.

This resolution supersedes Resolution No. 3055, as amended.

Date: February 24, 2010
W.I.: 1227
Referred By: Operations Committee

Re: Transit Coordination Implementation Plan

METROPOLITAN TRANSPORTATION COMMISSION

RESOLUTION NO. 3866

WHEREAS, pursuant to Section 66516 of the California Government Code, the Metropolitan Transportation Commission (MTC) is required to adopt rules and regulations to promote the coordination of fares and schedules for all public transit systems within its jurisdiction and to require every system to enter into a joint fare revenue sharing agreement with connecting systems; and

WHEREAS, pursuant to Section 66516.5 of the Government Code, MTC may identify and recommend consolidation of those functions performed by individual public transit systems that could be consolidated to improve the efficiency of regional transit service and;

WHEREAS, pursuant to Section 99282.5 of the California Public Utilities Code (PUC), MTC is required to adopt rules and regulations to provide for governing interoperator transfers so that the public transportation services between public transit operators are coordinated; and

WHEREAS, pursuant to Section 99314.7 of the Public Utilities Code, MTC is required to evaluate an operator's compliance with coordination improvements prior to an operator receiving allocations of State Transit Assistance (STA) funds; and

WHEREAS, pursuant to Section 30914.5 of the Streets and Highways Code, MTC must adopt, as a condition of Regional Measure 2 fund allocation, a regional transit connectivity plan to be incorporated in MTC's Transit Coordination Implementation Plan pursuant to Section 66516.5, requiring operators to comply with the plan, which must include Policies and procedures for improved fare collection; and

WHEREAS, MTC previously adopted Resolution No. 3055 to implement these requirements; and

WHEREAS, in order to ensure progress toward implementing coordination recommendations, MTC wishes to formalize these recommendations by adopting the rules and requirements required pursuant to Government Code Section 66516 and PUC Section 99282.5 as set forth in this MTC Transit Coordination Implementation Plan, which includes a regional Transit Connectivity Plan and Implementation Requirements, attached to this Resolution as Attachments A and B, and incorporated herein as though set forth at length;

WHEREAS, MTC has consulted with the region's transit agencies to develop the regional Transit Connectivity Plan and Implementation Requirements, as required by Government Code §§ 66516 and Streets and Highways Code § 30914.5; now therefore be it

RESOLVED, that MTC adopts the Transit Connectivity Plan ("Plan") as set forth in Attachment A; and be it further

RESOLVED, that MTC adopts the Implementation Requirements, as set forth in Attachment B; and, be it further

RESOLVED, that prior to determining fund programming and allocations for an operator, MTC shall review the efforts made by the operator to implement the requirements identified in Attachments A and B, and if MTC determines that the operator has not made a reasonable effort to implement the requirements of Attachments A and B, MTC may, at its discretion, withhold, restrict or re-program funds and allocations to such operator to the extent allowed by statute, rule, regulation, or MTC policy; and, be it further

RESOLVED, that all funds subject to programming and/or allocation by MTC are covered by this resolution including but not limited to State Transit Assistance, Transportation Development Act, Regional Measure 2, Congestion Mitigation and Air Quality, Surface

Transportation Program and Transit Capital Priorities funds, to the extent permitted by statute; and, be it further

RESOLVED, that this resolution shall be transmitted to the affected transit operators to guide them in development of their annual budgets and short-range transit plan revisions; and, be it further

RESOLVED, that the Operations Committee is authorized to approve amendments to Attachments A and B, following consultation with the affected transit operators; and be it further

RESOLVED, this resolution supersedes Resolution No. 3055.

METROPOLITAN TRANSPORTATION COMMISSION

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Scott Haggerty, Chair

The above resolution was entered into by
the Metropolitan Transportation Commission
at a regular meeting of the Commission held in
Oakland, California, on February 24, 2010

Attachment A
MTC Transit Connectivity Plan

This Attachment A incorporates by reference the Transit Connectivity Plan, previously approved by MTC in MTC Resolution No. 3055, which may be downloaded at: http://www.mtc.ca.gov/planning/connectivity/index.htm.

Attachment B
Implementation Requirements

The purpose of these Implementation Requirements is to establish the expectations and requirements for each transit agency with respect to implementing the recommendations of the Commission's Transit Connectivity Plan (2006) and maintaining other transit coordination programs, to outline the process by which MTC will involve transit operators in changes to coordination requirements, and to establish the process for Commission action in the event of transit agency non-compliance with these implementation requirements. A copy of this Resolution 3866 is available for download at http://www.mtc.ca.gov/planning/tcip/.

Per the Transit Connectivity Plan, MTC places high priority on improvements that:

- Accomplish tangible improvements for the passenger;
- Benefit the largest number of transit users, including both inter- and intra-system transit riders, to the extent possible;
- Improve system productivity by sharing agency resources; and
- Enhance the ability of transit riders to reach significant destinations in adjoining jurisdictions and along regional corridors by (1) improving the connections between system services and (2) providing through service to adjoining jurisdictions in those cases where the market clearly justifies such service.

In order to manage resources effectively, MTC will focus on a limited number of high priority improvements, transfer project leadership from MTC to one or more transit agencies where possible upon agreement of project partners, and establish priorities for implementing new projects.

The Commission has established specific transit operator requirements to implement a coordinated regional network of transit services and to improve overall service productivity as defined in the Transit Connectivity Plan. Any agency that is an eligible recipient of funds subject to allocation or programming by MTC is subject to these requirements, including, but not limited to the following:

1. Altamont Commuter Express
2. Alameda-Contra Costa Transit District
3. Bay Area Rapid Transit District
4. Caltrain
5. Capital Corridor Joint Powers Authority
6. Central Contra Costa Transit Authority
7. Dumbarton Bridge Route Operating Consortium
8. Eastern Contra Costa Transit Authority
9. Golden Gate Bridge, Highway and Transportation District
10. Livermore Amador Valley Transit Authority
11. Marin County Transit District
12. Napa County Transportation Planning Agency
13. San Francisco Municipal Transportation Agency
14. San Mateo County Transit District
15. Santa Clara Valley Transportation Authority
16. Solano Transportation Authority
17. Sonoma County Transit
18. Sonoma Marin Area Rail Transit
19. Transbay Joint Powers Authority
20. Union City Transit
21. Water Emergency Transportation Authority
22. Western Contra Costa Transit Authority
23. City of Alameda
24. City of Benicia
25. City of Cloverdale
26. City of Dixon
27. City of Emeryville
28. City of Fairfield/Suisun City Transit
29. City of Healdsburg
30. City of Petaluma
31. City of Rio Vista
32. City of Santa Rosa
33. City of Vacaville
34. City of Vallejo

A. Operator Implementation Requirements

1. Implementation Requirements

The region has a history of implementing projects to improve transit coordination. Early efforts focused on regional programs and policies such as disseminating tax-free transit benefits and making paratransit eligibility determinations. More recent efforts, such as the Transit Connectivity Plan, identified improvements to (1) designated regional transit hubs, including way-finding signage and transit information, real time transit information, schedule coordination, last-mile services and hub amenities, and (2) system wide connectivity improvements, including 511 information and Clipper®.

Specific implementation requirements for transit operators are listed in Appendices to this Attachment:

- Appendix B-1, 511 Transit Program Requirements (including real-time transit);
- Appendix B-2, Regional Transit Hub Signage Program Requirements;
- Appendix B-3, Clipper® Implementation Requirements; and
- Appendix B-4, Maintenance of Existing Coordinated Services.

As MTC continues to address recommendations from the Transit Connectivity Plan and other emerging issues such as Transit Sustainability, new implementation requirements may become necessary. The appendices may be modified to reflect changes in implementation

responsibilities, following the procedures outlined in this Attachment B, and subject to approval by the Commission.

2. SB 602 Fare and Schedule Coordination Requirements
Currently, each operator certifies its adherence to the provisions of SB 602 (Statutes 1989, Chapter 692, Government Code Section 66516, and as subsequently amended) as part of the annual allocation process for TDA and STA funds when requests for these funds are submitted to MTC. The SB 602 requirements are now incorporated into this Res. 3866, and each operator's compliance will be monitored accordingly. Per the requirements of SB 602, each transit agency in the region has a revenue sharing agreement with every connecting agency. In some cases, this takes the form of a reciprocal agreement to accept each other's passengers free of charge or to honor each other's period passes or single-trip transfers for a discounted fare. The BART/Muni FastPass is an example of a joint fare instrument to address SB602 requirements. Each transit agency in the region is required to maintain these reciprocal agreements as a condition of receiving STA funds (Gov. Code 66516).

3. Preserve Ability to Post and Disseminate Transit Information
MTC expects transit operators to preserve rights for MTC and connecting transit operators to post and disseminate connecting transit information for free within their facilities. This would include but not be limited to route, schedule, fare, real-time transit information and information about regional transit projects (511, ~~TransLink~~Clipper®). For any transit agency that has already entered into a third-party agreement that compromises these rights, MTC expects the transit agency to make good faith efforts to reinstate these rights in their agreement at the earliest opportunity and, at a minimum, to reinstate such rights in future agreements or renewals entered into after adoption of this Resolution. Nothing herein shall be interpreted as requiring transit agencies to display advertising. Rather, the objective is to provide transit customers with pertinent information that improves their transit experience.

B. Cost-Sharing
Implementation activities and other new transit connectivity and coordination efforts added to these Implementation Requirements will be funded with MTC discretionary funds, transit agency funds, and/or in-kind contributions of MTC and transit agency staff resources. If MTC considers adding new projects or services, MTC would implement the consultation process described in Section C below to vet any expected cost impacts on the operators. Transit agencies are required to waive all agency fees (for permits, etc.) they would otherwise charge to MTC, other transit operators or third-party contractors to implement and maintain regional transit coordination projects detailed in these requirements. Unless otherwise noted, MTC and transit agencies are expected to cover the cost to implement their respective roles and responsibilities as identified in these requirements or in pre-existing agreements. As specific initiatives move to implementation, a lead agency may be designated to coordinate implementation activities on behalf of the other participating transit agencies. Any agency that assumes this lead role and incurs costs that it would otherwise not assume in order to perform this function may be reimbursed, based upon an equitable agreement with the participating agencies, on a marginal cost basis (i.e., the additional cost the transit operator incurs to perform the work).

C. Consultation Process

MTC will consult with transit agencies when defining new coordination requirements for inclusion in Res. 3866 or when updating or revising requirements already in Res. 3866.

MTC will first consult with one or more of its technical advisory committees (TACs) to receive transit agency input on the specific implementation requirements. MTC will notify TAC members of the meetings and provide agendas in advance, and facilitate TAC discussions. Affected transit operators are expected to participate. Transit agencies are responsible for ensuring that the appropriate staff attends TAC meetings, that they participate in discussions in good faith, and that they communicate with other relevant staff within their agency (including those employees whose work may be affected) and executive management so that timely and constructive agency feedback can be provided to MTC. MTC will consider TAC input when formulating draft policy. In cases where there is no relevant TAC to address the issue under consideration, MTC will formulate draft policy and solicit feedback from general advisory groups, such as the Partnership Technical Advisory Committee (PTAC) or the Transit Finance Working Group.

At its discretion, MTC may also solicit input from the Partnership Board, the Partnership Technical Advisory Committee, the Transit Finance Working Group and MTC's Policy Advisory Council prior to Commission action. Following consultation with the TAC(s) and/or other advisory groups, MTC will solicit feedback from the Partnership Transit Coordination Committee. MTC will provide notification of the proposed PTCC meeting and agenda through written communication to transit general managers and transit program coordinators and posting of the meeting materials on MTC's web site.

After consulting with transit agencies, MTC will forward staff's recommendations to the MTC Operations Committee and the Commission.

D. Sanctions

The Commission expects each transit agency to comply with the requirements outlined in this Resolution and its Attachments as a condition of eligibility for STA and TDA funds, Regional Measure 2 funds, transit capital funds (including federal transit formula funds, STP, CMAQ and STIP funds) and other funds subject to Commission programming and allocation actions. MTC intends that the region's transit agencies will implement these requirements in good faith and cooperation among themselves and with MTC. The sanction of withholding, restricting or re-programming funds to enforce cooperation will be exercised by MTC in cases where an agency fails to meet or fails to exhibit good faith in meeting these requirements. In such cases, MTC staff will notify the agency of the possibility that a sanction may be imposed. This notification will also recommend corrective actions that the agency should take to meet the implementation requirements. The notification will be sent no less than sixty (60) days prior to forwarding an MTC staff recommendation to the Commission.

Appendix B-1
511 Transit Information Requirements

MTC provides static transit data (i.e. schedules/trip planning information) through the 511 phone and web service and real-time transit departure information through the 511 phone and web services and the Regional Hub Signage Program. MTC requires the full participation and support of all transit agencies to deliver quality and timely information. MTC and the transit agencies have jointly developed data transfer mechanisms for schedule, trip planner and real-time transit data and identified appropriate roles and responsibilities for all parties, as documented in "*511 Transit Program Roles and Responsibilities*." MTC will review these requirements on an as-needed basis with transit agency partners. Additionally, MTC and the Real-Time Transit TAC developed "*Real-time Transit Information System System Requirements*" that detail the system requirements for all parties. The two documents are available at: http://www.mtc.ca.gov/planning/tcip/. The key roles and responsibilities to provide transit agency data on 511 services are as follows:

Transit Agencies will:

Generally:

1. Participate in MTC's 511 RTIS and Real-Time Transit Technical Advisory Committees.
2. Support, fund and staff their roles and responsibilities related to the 511 services as described below.
3. Notify transit customers of the availability of 511 information and 511.org on transit agency web sites, in printed materials, at bus stops/rail stations, and on other transit agency information channels.

For Static Transit Information (Schedules/Trip Planner):

4. Provide accurate, complete, timely information regarding transit routes, stops, schedules, fares for dissemination on all 511 features and services.
5. Transmit schedule and other transit service information to MTC in advance of any schedule changes to allow for MTC's timely inclusion in the 511 Transit website. MTC will provide a schedule identifying the necessary advance time.
6. Perform quality control review (focusing on data changed for upcoming service revisions) on a representative sample of agency service data prior to transmittal to MTC for MTC's timely inclusion in 511's features and services.

For Real-time Transit Information:

7. Provide prediction data to the Regional System by establishing and maintaining a data connection to the Regional System and operating and maintaining an interface application.
8. Meet requirements, as defined in "*Real-time Transit Information System System Requirements*", including the standard interface requirements, and in "*511 Transit Program Roles and Responsibilities*".
9. Conduct on-going performance monitoring to ensure accurate and timely transfer of data to the Regional System and accurate provision of prediction data to the public, in collaboration with MTC.
10. Ensure that there is no impact to its provision of prediction data to 511 in the event that the transit agency provides its specific prediction data to a third party.

11. Provide service disruption information to 511 where available and logistically feasible through agreed upon formats.

MTC will:

Generally:

1. Organize and facilitate MTC's 511 Transit RTIS and Real-time Transit Technical Advisory Committees (TAC).
2. Fund, operate, and maintain the 511 services for regional transit information, including 511.org, the 511 transit website, 511 phone, regional real-time transit signs at transit hubs, and other relevant new applications.
3. In collaboration with transit agencies, conduct performance monitoring to ensure accurate and timely transfer of both static and real-time transit data to the Regional 511 System.

For Static Transit Information (Schedules/Trip Planner):

4. Notify transit customers of the availability of transit agency websites at appropriate locations on web site pages of 511.org.

For Real-time Transit Information:

5. Share with third party vendors and the general public the real-time transit data as described in "*511 Transit Program Roles and Responsibilities*".
6. Provide agencies with contact information for the 511 Traveler Information Center (TIC) to allow for the posting of real-time transit service disruption/emergency information on 511.

Appendix B-2
Regional Transit Hub Signage Program Requirements

MTC and transit agencies have developed the Regional Transit Hub Signage Program Technical Standards and Guidelines (e.g. 'the Standards') to ensure consistency across the region as the signage is deployed and maintained. A detailed version of the Standards is available at: http://www.mtc.ca.gov/planning/tcip/. The Standards may be periodically updated to reflect their evolution through the Concept Plan and Design/Plan, Specification and Estimates phases of implementation.

The Standards include:

1. Four main sign types: directional signs, wayfinding kiosks, transit information displays, real-time transit information displays.
2. Guidance to locate signs at key decision points between transit operator services.
3. Design elements to establish a common "look" and "feel" for the signage including:
   - Orange 'i' icon on a green background;
   - Standard logos, icons, arrows and messages and an organizing hierarchy;
   - Standard 'frutiger' font;
   - Hierarchy for the location of information in each sign;
   - Consistent map orientation and colors;
   - Directional map compass and walking distance/time radius;
   - Transit stop designation through agency logo/mode icon/route number 'bubbles'; and
   - Prominent 511 logo/message and regional transit program information.

Transit Agencies will:

1. Lead and/or actively participate in the process to implement the Hub Signage Program. Participate on the Transit Connectivity TAC.
2. Comply with the Standards which generally apply to the 21 regional transit hubs identified in the Transit Connectivity Plan and three airports. Where exceptions to the Standards are desired, transit operators must seek prior approval from MTC. Where ambiguity in the Standards exists, transit operators shall request clarification from MTC.
3. Comply with cost responsibilities. Per Res. 3771 (July 2006), costs associated with implementing the Regional Transit Hub Signage Program at the 24 hubs are shared. A revised matrix clarifying cost responsibility by sign type is included as Appendix B-2, Attachment 1. After initial installation, maintenance and replacement of each sign shall be the responsibility of the assigned transit agency.
4. Comply with task responsibilities (O&M, replacement and ownership) further detailed in Appendix B-2, Attachment 1. MTC expects that transit agencies will jointly confirm task responsibility for each sign at each hub during the Concept Plan phase, prior to sign installation, which will ultimately be documented in a table titled "Hub Signage Program Sign Ownership", incorporated herein by reference, and posted on MTC's website at http://www.mtc.ca.gov/planning/tcip/. In most cases, the transit agency that owns the property on which the sign is installed will be assigned responsibility. For signs installed on property not owned by a transit agency, the transit agency providing the most service

(passenger boardings) in the area of the sign will be assigned responsibility. Some negotiation between transit agencies may be necessary depending on sign location. Signs will not be installed until task responsibilities are final. Once installed, transit agencies must comply with the agreed-upon task responsibilities.

5. Facilitate the permitting of signs by waiving all fees that a transit agency would usually charge for sign installation on its property or leased operating area.
6. As transit agencies plan new facilities or prepare for major remodels of existing facilities, they shall consult with MTC early in the planning process for applicability of the Standards to the project.

MTC will:

1. Develop, document and periodically update regional sign Standards.
2. Support coordination of Hub Signage Program implementation at all 24 hubs.
3. Comply with cost and task responsibilities detailed in Appendix B-2, Attachment 1.
4. Solicit feedback from transit agencies on significant changes to regional policy affecting the 24 hubs through the Transit Connectivity Technical Advisory Committee.
5. As resources permit, provide technical assistance to transit agencies wishing to extend the regional sign Standard to non-regional hubs.

Appendix B-2, Attachment 1: Hub Signage Program Cost/Task Responsibilities

Hub Signage Program Element	Task	Est. Cost	Cost Responsibility		Task Responsibility	
			Regional	Operator*	Regional	Operator*
All Sign Types	1. Initial Deployment	$10,053,000				
	Concept Plans; Design/PSEs, Procure, Fabricate & Install		X		MTC-led hubs	BART Santa Rosa
Directional/Wayfinding Signs (including hub identification signs)	2. Annual Operations and Maintenance (O&M), including:	$680,000				
	Info. content, electricity, cleaning, graffiti removal, repairs			X		X
	3. Lifecycle Replacement	(included in #2)				
	Planning, procurement, coordination, installation			X		X
	4. Ownership	(included in #2)				
	Insurance liability, warranty claims			X		X
Wayfinding Kiosks	5. Annual Operations and Maintenance (O&M), including:	(included in #2)				
	Electricity, regular cleaning and graffiti removal, repairs			X		X
	Information content, quarterly cleaning		X		X	
	6. Lifecycle Replacement	(included in #2)				
	Planning, procurement, coordination, installation			X		X
	7. Ownership	(included in #2)				
	Insurance liability, warranty claims			X		X
Real-Time Transit Signs	8. Annual Operations and Maintenance (O&M), including:	$254,000				
	Electricity, communications, cleaning, graffiti removal, repairs, status reporting			X		X
	Information content		X		X	
	9. Lifecycle Replacement	$240,000				
	Planning, procurement, coordination, installation		X			X
	10. Ownership	(included in #8)				
	Insurance liability, warranty claims			X		X
Transit Information Displays	11. Annual Operations and Maintenance (O&M), including:	$177,000				
	Regular cleaning, damage/graffiti reporting			X		X
	Information content, electricity, communications, quarterly cleaning/graffiti removal, repairs, status reporting		X		X	
	12. Lifecycle Replacement	(included in #11)				
	Planning, procurement, coordination, installation			X		X
	13. Ownership	(included in #11)				
	Insurance liability, warranty claims			X		X
Totals	**Initial Capital Costs**	**$10,053,000**				
	Annual O&M, Replacement Costs	**$1,351,000**				

**In most cases, the transit agency who owns the property on which the sign is installed is responsible. For signs installed on property not owned by a transit operator, the transit agency providing the most service (passenger boardings) in the area of the sign is responsible. Sign responsibility will be confirmed as part of project planning prior to installation.*

Appendix B-3
~~TransLink~~Clipper® Implementation Requirements

This Appendix defines the Commission's expectations of the transit agencies to ensure a successful operation of the Clipper® (formerly TransLink®) system in ~~four~~ three sections:

I. Participation Requirements
II. Regional ~~TransLink®~~-Clipper® Communications and Marketing Activities
~~III. TransLink Card Distribution Program for Seniors and Youths~~
III. Fare Media Transition Schedules by Specific Operators

Section I describes general ~~TransLink~~Clipper® implementation requirements for participating operators.

Sections II ~~and III~~ defines expectations for communications and marketing: ~~two~~ a program areas critical to smooth implementation of a full transition to ~~TransLink~~Clipper® that can only be addressed through a collaborative, regional approach.
~~: customer awareness of and knowledge about TransLink~~Clipper®~~; and eligibility, validation and distribution of youth and senior cards; respectively.~~

Section ~~IV~~ III establishes the dates by which the ~~five~~ transit agencies that are currently operating ~~TransLink~~Clipper® will transition their existing prepaid fare media to ~~TransLink~~Clipper®-only availability.

I. Participation Requirements

The following transit agencies are currently operating ~~TransLink~~Clipper® as their fare payment system: AC Transit, BART, Caltrain, Golden Gate Ferry and Transit, ~~and~~ SFMTA, SamTrans, and VTA. ~~Additionally, MTC expects to declare SamTrans and VTA as TransLink® revenue-ready in 2010. Together these s~~Six of these agencies ~~and one joint powers authority~~ (not including Caltrain) were slated to be the first to operate ~~TransLink~~Clipper® and were classified as charter members in the ~~TransLink~~Clipper® Consortium, formed on December 12, 2003 by MTC and the six transit operators entering into the TransLink® Interagency Participation Agreement (IPA).[1] All seven agencies have negotiated and are in the process of entering into a Memorandum of Understanding (MOU) that will supersede the IPA when executed by all seven agencies and MTC. References in this Attachment to the IPA shall be read and understood to be references to the MOU after it becomes final.

The following describes general ~~TransLink~~Clipper® implementation requirements for participating operators.[2] An operator's failure to meet one or more of these requirements may result in non-compliance with Resolution 3866.

1. Implement and operate the ~~TransLink~~Clipper® fare payment system in accordance with the ~~TransLink~~Clipper® Operating Rules, as adopted and amended from time to time by MTC. The current ~~TransLink~~Clipper® Operating Rules (approved in October 2010~~April 2009~~) are incorporated herein by this reference. The ~~TransLink~~Clipper® Operating Rules establish operating parameters and procedures for the consistent and efficient operation of ~~TransLink~~Clipper® throughout the region and are available on MTC's website at http://www.mtc.ca.gov/planning/tcip/.

2. Pay its share of variable operating costs, according to the cost allocation formula set forth in Appendix A to the IPA, Cost Allocation and Revenue Sharing, except to the extent such costs are reduced by the incentive payments made by MTC (as referenced in Appendix A to the IPA).

3. Abide by the revenue sharing formula in Appendix A to the IPA.

4. Make its facilities and staff available to MTC and the ~~TransLink~~Clipper® Contractor for implementation of ~~TransLink~~Clipper®. Any Operator and MTC may agree to an Operator-Specific Implementation Plan, setting forth specific requirements regarding implementation and operation of ~~TransLink~~Clipper® for such Operator.

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[1] MTC ~~has given notice that it intends to withdraw~~ withdrew from the Consortium effective July 1, 2010, as permitted by the IPA; however, certain of its provisions related to cost allocation and indemnification ~~will~~ continue to apply to MTC.

[2] Items 1-6 are based on provisions of the IPA, as amended on June 27, 2005 and December 4, 2007, revised in light of MTC's ~~pending withdrawing~~ withdrawal from the Consortium.

5. Make determinations regarding the placement of ~~TransLink~~Clipper® equipment on the Operator's facilities and equipment; perform necessary site preparation; attend ~~TransLink~~Clipper® Contractor training on the use of the ~~TransLink~~Clipper® equipment; and provide training to employees using the equipment.

6. Accept transfer of ownership of equipment one year following Conditional acceptance by each Operator, as defined in Section 8.3 of the ~~TransLink~~Clipper® Contract (or for Phase 3 operators one year following Acceptance, as established by contract change order.[3]) Maintain and track a list of all equipment.

7. Perform actions necessary to support transfer of ownership of the ~~TransLink~~Clipper® bank accounts from BART to MTC. MTC must have fiduciary responsibility for patrons' prepaid balances no later than the date on which MTC's withdrawal from the Consortium becomes effective.

8. Implement, operate and promote ~~TransLink~~Clipper® as the primary fare payment system for each Operator. ~~TransLink~~Clipper®'s primary market is frequent transit riders (i.e., commuters and transit passholders). Operators shall not establish other fare payment systems or fare policies that could deter or discourage these patrons' preference to use ~~TransLink~~Clipper®. Operators shall set fares so that fares paid with ~~TransLink~~Clipper® are equivalent or lower than fares paid either with cash or other forms of payment.

   No new non-~~TransLink~~Clipper® prepaid fare product, other than for promotional, special event or limited-audience—e.g., tourist—fares, shall be created by any transit operator without consulting with and receiving prior approval from MTC.

   Nothing in this provision is intended to discourage operators from providing leadership on new technologies or innovations that would offer improvement to fare collection operations or the customer experience. The expectation is that these new initiatives should leverage the attributes and assets of ~~TransLink~~Clipper®, not compete with~~TransLink~~Clipper® or undermine customers' preference to use ~~TransLink~~Clipper®.

9. Perform first-line maintenance upon ~~TransLink~~Clipper® equipment located on their facilities or vehicles, promptly notify the ~~TransLink~~Clipper® Contractor when second-line maintenance of ~~TransLink~~Clipper® equipment is needed, promptly notify MTC and the ~~TransLink~~Clipper® Contractor of any issues affecting daily financial reconciliation or accuracy of system reports, issue all types (including, but not limited to, cards configured as senior or youth) of ~~TransLink~~Clipper® cards and add value to existing ~~TransLink~~Clipper® cards from all Ticket Office Terminals located at their business facilities, and provide at least the same level of front-line customer service to their patrons using ~~TransLink~~Clipper® as to patrons using other forms of fare payment.

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[3] The ~~TransLink~~Clipper® Contract refers to the Design Build Operate Maintain contract between MTC and Cubic Transportation Systems, Inc. for the ~~TransLink~~Clipper® fare payment system. The contract was assigned to Cubic on July 2, 2009 and has an operating term extending through November 2, 2019.

10. Sufficiently train and educate agency personnel who have ~~TransLink~~Clipper®-related responsibilities so those personnel are able to carry out the requirements placed upon operators in this Resolution.

11. Assist MTC, as necessary, to develop a program for Transit Capital Priorities (TCP) funds for the purpose of procuring and installing end-of-lifecycle ~~TransLink~~Clipper® equipment and to submit and administer grants for programmed TCP funds on a "pass-through" basis.

12. Upon transfer of ownership of equipment, take financial responsibility for replacement of equipment damaged in-service due to vandalism or any other cause not covered by the ~~TransLink~~Clipper® Contract warranty.[4]

~~13. MTC has begun the process of changing the name of the TransLink® program and service to Clipper®. Once the new brand is implemented, all references to "TransLink®" in this resolution shall be deemed to refer to "Clipper®."~~

II. Regional ~~TransLink~~Clipper® Communications and Marketing Activities

1. Effective Date. For operators currently operating the ~~TransLink~~Clipper® system, these ~~TransLink~~Clipper® marketing and communications requirements are effective immediately. For operators not yet operating ~~TransLink~~Clipper®, the requirements are effective two months after MTC's approval of the ~~TransLink~~Clipper® system as Revenue Ready for that operator.

2. General Requirements. Operators shall present ~~TransLink~~Clipper® to customers, employees and media as a fully operational fare payment option. This includes, but is not limited to, identification of ~~TransLink~~Clipper® as a fare payment option in brochures, websites, advertisements, schedules/timetables, email newsletters, internal memos, bulletins and training manuals, and any other materials that describe an operator's fare payment options. Operators shall present ~~TransLink~~Clipper® as an option so that ~~TransLink~~Clipper® has equal or greater prominence than the presentation of other payment options. Each operator shall incorporate and/or modify the presentation of ~~TransLink~~Clipper® in existing brochures, websites, schedules/timetables, etc. whenever the operator next updates the content of these items.

   In all cases, operators' marketing and communications about ~~TransLink~~Clipper®, whether in brochures, websites, advertisements or other forms, shall adhere to ~~TransLink~~Clipper® brand guidelines developed by MTC with input from transit operators. The ~~TransLink~~Clipper® Brand Guidelines are available at-
   ~~https://www.translink.org/TranslinkTransLinkWeb/toolbox.do~~https://www.clippercard.com/ClipperWeb/toolbox.do.

[4] MTC shall procure replacement equipment on an operator's behalf, and operators shall pay for the full cost of the equipment including all installation costs and materials.

3. Equipment Identification. If not already identified as such, operators shall identify ~~TransLink~~Clipper®-compatible fare payment and ~~TransLink~~Clipper®-compatible vending equipment with a decal or other visual identifier to indicate the equipment's ~~TransLink~~Clipper® compatibility.

4. Operator Training. Operators shall ensure appropriate ~~TransLink~~Clipper®-related training for transit operator staff including, but not limited to, vehicle operators, station agents, conductors, customer service personnel, proof of payment officers, ticket sales staff and any other personnel responsible for interacting with customers concerning payment options.

5. Marketing Coordination. Operators shall participate in the development and implementation of a ~~TransLink~~Clipper® marketing and communications initiative that will begin approximately June 1, 2010. This includes, but is not limited to:
   - Staff participation in the development and implementation of the initiative;
   - Dissemination of ~~TransLink~~Clipper® brochures and/or other information materials on vehicles and/or in stations in a manner consistent with the operator's dissemination of other similar operational information; and
   - Providing information about ~~TransLink~~Clipper® utilizing space available on vehicles and/or in stations that is already used by the operator for dissemination of operational information (space available includes, but is not limited to, car cards, posters, and electronic displays).

6. Funding. Funding for the initial phases of the communications and marketing program shall come from the marketing funds already in the ~~TransLink~~Clipper® capital budget and previously assigned to individual operators.

~~7.Name Change. Operators shall cooperate with or participate in actions taken by MTC or the TransLink® Contractor to change the TransLink® brand name to Clipper®.~~

~~**III. TransLink® Card Distribution Program for Seniors and Youths**~~

~~Unless transit operators and MTC agree upon a different time or approach, as of April 1, 2010, transit operators accepting TransLink® shall distribute TransLink® cards to youths and seniors using the following standard region-wide approach:~~

~~1.Customers will be able to request cards at all transit agency ticket offices and any other locations approved by the TransLink® Consortium, e.g. senior centers;~~
~~2.Transit agency staff or staff at approved locations will verify a customer's date of birth and approve the customer's written application if the customer qualifies for discount fares on any participating agency (up to age 18 for youth cards and not less than age 65 for senior cards);~~
~~3.Transit agencies and other approved providers will send all approved applications to the TransLink® Service Bureau (TSB), which is operated by the TransLink® Contractor under contract to MTC;~~
~~4.TSB will fulfill all new and replacement cards with the encoded date of birth;~~
~~5.TSB will prevent issuance of duplicate cards, hotlist lost/stolen cards, and hotlist cards identified as used fraudulently;~~
~~6.TSB will issue the cards without photos;~~

~~7. Transit agency personnel may continue using existing tactics to verify that a customer qualifies for a discount; and~~
~~8. Transit agency personnel should report fraudulent cards to TSB for hotlisting.~~

~~AC Transit shall distribute cards directly to youths, i.e. without involvement from TSB. At its option, AC Transit may issue the cards with photos of the registered bearer of the card. AC Transit shall register the cards in the TransLink® system.~~

Comment [dw1]: Section to be deleted in its entirety. Since adoption of Res. 3866, new distribution procedures have been implemented through efforts of MTC and transit agencies. Operator and Contractor responsibilities and procedures re senior and youth card issuance and distribution are and will be set forth in the Operating Rules.

III~~IV~~. Fare Media

~~In mid-2009, MTC requested that the five transit agencies which are currently operating TransLink® submit plans to describe how they will transition their existing prepaid fare media – i.e., tickets and passes – to TransLink® only availability within two years or less following their revenue-ready dates.~~

The tables below set forth ***the fare media*** that the designated operator shall convert to Clipper®-only availability and ***the date*** by which the operator shall no longer accept such fare media in its existing form. In general, MTC has emphasized with each operator a transition of those fare products which currently represent a significant portion of that operator's boardings.

An operator will be excused from compliance with a transition date requirement for particular fare media, if the Clipper® Contractor has not met at least ~~83%~~ 80% of the cardholder support service level standards set forth in Section B.1.12 of the Clipper® Contract for the two calendar months ending one month before the scheduled transition date. The operator's transition date requirement for the affected fare media will be reset to one month after the Clipper® Contractor has met at least ~~83%~~80% of the Clipper® Contract's cardholder support service level standards for two consecutive calendar months.

AC Transit will transition its existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
EasyPass	Transition done	
31-Day Transbay Pass – Adult	Transition done	
Bear Pass (U.C. Berkeley Employee Pass)	Transition done	
10-Ride Ticket – Youth	Transition done~~12/31/2010~~	~~Sales of the non-TransLink® version of this pass/ticket will end no later than 9/30/2010.~~
10-Ride Ticket – Adult	Transition done~~12/31/2010~~	~~Same comment as above~~
31-Day Local Pass – Youth	Transition done~~12/31/2010~~	~~Same comment as above~~
31-Day Local Pass – Adult	Transition done~~12/31/2010~~	~~Same comment as above~~
10-Ride Ticket – Senior/Disabled	Transition done~~Requirement waived at this time~~	Product in paper form was effectively eliminated upon transition of Youth 10-Ride Ticket to Clipper®-only.~~As a requirement prior to limiting this product to TransLink®-only availability, AC Transit has proposed implementation of additional TransLink® card readers at all vehicle entry points used by wheelchair customers.~~
~~Monthly Pass – Senior/Disabled~~	~~Requirement waived at this time~~	~~As a requirement prior to limiting this product to TransLink®-only availability, AC Transit has proposed implementation of additional TransLink® card readers at all vehicle entry points used by wheelchair customers.~~
~~Class Pass (U.C. Berkeley Student Pass)~~	~~Requirement waived at this time~~	~~AC Transit has opted not to make this pass available to TransLink® customers. AC Transit will make the pass available to TransLink® customers only following completion of the proposed integration of TransLink® and U.C. Berkeley campus identification card functions.~~
~~1-ride and 1-ride plus transfer (for social service agencies)~~	~~Requirement waived at this time~~	

Comment [dw2]: Product deleted from Res. 3866 because no viable approach on Clipper

Comment [dw3]: Product deleted from Res. 3866 because no viable approach on Clipper

Comment [dw4]: Product deleted from Res. 3866 because no viable approach on Clipper®.

BART will transition its existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
EZ Rider card as payment for transit	Transition done~~10/1/2010~~	~~EZ Rider card will continue to be accepted after this date as payment for parking at BART lots, until TransLink® is available as payment for parking~~
High Value Discount (HVD) adult magnetic stripe ticket (blue)	12/31/2011~~3/1/2011~~	~~BART Board approval planned for Aug 2010~~ • ~~March 2011~~ Transition date is when sales would end; acceptance of magnetic stripe tickets would continue until customers deplete their stock • BART may continue distribution to employer benefit distributors until two planned technology improvements are in place on Clipper®.
Senior magnetic stripe ticket (green)	12/31/2011~~5/1/2011~~	~~May 2011~~ December 2011 date is when sales would end. ~~Date is subject to further analysis of possible legal constraints.~~
Youth and disabled magnetic stripe ticket (red)	12/31/2011~~5/1/2011~~	~~May 2011~~December 2011 date is when sales would end. ~~Date is subject to further analysis of possible legal constraints.~~
Student magnetic stripe ticket (orange)	Requirement waived ~~at this time~~	Product not available on Clipper®. Recommend that BART align its definition of youth/student discount with all other operators in region, and eliminate this fare product. ~~Pending evaluation and implementation of eligibility verification and distribution processes for a TransLink® version of this fare product~~
~~BART Plus Ticket~~	~~Requirement waived at this time~~	~~MTC defers transition of this fare medium until all other transit agencies which also accept the BART Plus Ticket have begun to accept TransLink®, and subject to MTC's evaluation of the operational and financial feasibility of a transition of this product to TransLink.~~

Comment [dw5]: Product not available on Clipper®. Recommend discussion with other participating operators for a future, simpler inter-operator discount fare.

Caltrain will transition its existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
Full Fare Monthly Pass	Transition done~~1/31/2011~~	
8-ride Ticket	Transition done~~1/31/2011~~	
Caltrain + Muni Monthly Pass	Transition done~~1/31/2011~~	
Eligible Discount Monthly Pass	Transition done~~1/31/2011~~	
8-ride Eligible Discount Ticket	Transition done~~1/31/2011~~	
~~Go Pass~~	~~1/31/2011~~	

Comment [dw6]: Product deleted from Res. 3866 because no viable approach on Clipper®.

~~In addition, because Caltrain will not be transitioning its fare media to TransLink® within two years of Revenue Ready as originally requested by MTC, the following additional obligations are placed upon Caltrain:~~

~~Media Type or Function~~	~~Minimum Sales Per Month of TransLink® Version, or %~~	~~Date By Which to Achieve:~~
~~Monthly Pass~~	~~1,000~~	~~May 31, 2010~~
~~Monthly Pass~~	~~5,000~~	~~November 30, 2010~~
~~8-Ride Tickets~~	~~3,000~~	~~May 31, 2010~~
~~8-Ride Tickets~~	~~10,000~~	~~November 30, 2010~~
~~Autoload of Caltrain fare products~~	~~At least 50%~~	~~November 30, 2010~~

Golden Gate Transit and Ferry will transition its existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
$25 Value Card	Transition done~~8/1/2010~~	~~June 30, 2010 is the last day these Value Cards will be sold~~
$50 Value Card	Transition done~~8/1/2010~~	~~Same comment as above~~
$75 Value Card	Transition done~~8/1/2010~~	~~Same comment as above~~

The fare products listed below are issued by Marin Transit, yet accepted on vehicles operated by Golden Gate Transit within Marin County. If MTC and Marin Transit reach agreement whereby Marin Transit begins to accept Clipper® as a fare payment method, each of the fare media listed below shall be converted to Clipper®-only availability within six months after implementation of a Clipper® version of such fare media.

- $18 Value Card
- $36 Value Card
- Marin Local 1-Day Pass
- Marin Local 7-Day Pass
- Marin Local 31-Day Pass
- Marin Youth Pass

San Francisco MTA will transition its existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
Monthly Passes		
Adult BART/Muni Monthly Pass	Transition done~~8/1/10~~	
Adult Muni Monthly Pass	Transition done~~4/1/11~~	~~New product available for Jan 1 2010 sales period. Transition schedule dependent on completion of Metro faregates program.~~
Senior Muni Monthly Pass	Transition done~~2/1/11~~	.
RTC/Disabled Monthly Pass	Transition done~~9/30/10~~	~~Date shown assumes availability on TransLink® of the Senior/Disabled BART/Muni Monthly Pass. In no event shall the transition date for this product be later than February 1, 2011.~~
Youth Monthly Pass	Transition done~~2/1/11~~	
~~Senior/Disabled BART/Muni Monthly Pass~~	~~Date to be set after product development schedule and budget provided by Contractor~~	~~New product development and coordination with BART required for implementation.~~
~~Lifeline~~	~~Date to be set after product development schedule and budget provided by Contractor~~	~~SFMTA to submit to MTC an implementation strategy and proposed transition date by March 31, 2010.~~
Visitor/Cable Car		
1 Day Passport	Requirement waived ~~6/30/11~~	Product not currently available on Clipper® limited-use (LU) tickets. However, LUs are preferred implementation option.~~Schedule dependent on availability of fare payment handheld card reader and availability of product on limited use card.~~
3 Day Passport	Requirement waived~~6/30/11~~	Product not currently available on Clipper® limited-use (LU) tickets. However, LUs are preferred implementation option.~~Same as above~~

Comment [dw7]: Product not available on Clipper®.

Comment [dw8]: Product not available on Clipper®.

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
7 Day Passport	Requirement waived~~6/30/11~~	Product not currently available on Clipper® limited-use (LU) tickets. However, LUs are preferred implementation option.~~Same as above~~
Ticket Books/Tokens		
Adult Single Ride Ticket Book	Transition done ~~4/30/10~~	~~This is the 10-ridebook in TransLink.~~

~~School/Youth Ticket Book~~	~~Requirement waived at this time~~	~~Pending development of limited use card.~~
~~Adult Single Token~~	~~4/1/11~~	~~Pending development of limited use card; this product is a one-time use ride distributed by non-profits to clients.~~
Inter-Agency Transfers		
BART Two-Way Transfer	Transition done~~8/1/10~~	~~May require SFMTA Board action~~
BART/Daly City Two-Way Transfer	3/1/12~~8/1/10~~	~~May require SFMTA Board action~~
Golden Gate Ferry Two-Way Transfer	Transition done~~3/30/10~~	
Institutional Pass		
~~Class Pass~~	~~To be set after product development schedule and budget provided by Contractor~~	~~SFMTA to determine distribution strategy for fare product by June 30, 2010.~~
Transfers		
Bus Transfers	9/30/12~~9/30/11~~	~~Requires SFMTA Board action~~
Metro/Subway Transfers	Transition done ~~9/30/11~~	~~TransLinkRequires SFMTA Board action~~
ADA Transfers	Transition done~~3/31/11~~	~~Requires SFMTA Board action~~
~~BART Plus Ticket~~	~~Requirement waived at this time~~	~~Transition requirement for this fare medium is suspended until all transit agencies which accept the BART Plus Ticket have begun to accept TransLink®, and subject to MTC's evaluation of the operational and financial feasibility of a transition of this product to TransLink.~~

Comment [dw9]: Product deleted from Res. 3866 because no viable approach on Clipper®.

Comment [dw10]: Product deleted from Res. 3866 because no viable approach on Clipper®.

Comment [dw11]: Product not available on Clipper®.

Comment [dw12]: Not a SFMTA fare product.

SamTrans will transition these existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
Local Monthly Pass	12/31/11	
Local SF Monthly Pass	12/31/11	
Express Monthly Pass	12/31/11	
Eligible Discount Monthly Pass—senior/disabled	12/31/11	
Youth Monthly Pass	12/31/11	December 2011 date is when paper form of product is no longer available for purchase through retail outlets.

VTA will transition these existing fare media by the following dates:

Fare Media	Date for Ending Acceptance of Listed Prepaid Fare Media	Comments
Day Pass	6/30/2012	
Express Day Pass	6/30/2012	
Monthly Pass	6/30/2012	
Monthly Express Pass	6/30/2012	
Day Pass Tokens	6/30/2012	Date is when product is no longer available for purchase through retail outlets.

Other Operators

The following are general Clipper® implementation and fare media transition requirements for operators not yet operating Clipper®. Following MTC's approval of the Clipper® system as Revenue Ready for a given operator, MTC will work with the operator to identify more specific fare media transition plans. Unless otherwise approved by MTC, an operators shall (i) begin accepting Clipper® for fare payment by customers no more than two months following MTC's approval of the Clipper® system as Revenue Ready for ~~a given~~the operator~~.~~, and (ii) end acceptance of prepaid non-Clipper® fare media no more than one year following MTC's approval of the Clipper® system as Revenue Ready for the operator.

~~Operator~~	~~Date for Ending Acceptance of Prepaid Non-TransLink® Fare Media~~
~~SamTrans~~	~~One year after Revenue Ready milestone is achieved and TransLink® equipment has been installed on the new SamTrans vehicles currently being manufactured by Gillig.~~
~~VTA~~	~~One year after Revenue Ready milestone is achieved and VTA's day pass has been deployed as a TransLink® fare product.~~
~~Other operators~~	~~One year after Revenue Ready milestone~~

Appendix B-4
Maintenance of Existing Coordinated Services

The Commission's previously adopted Transit Coordination Implementation Plan (Resolution No. 3055) included a number of coordination programs that were not modified by the Transit Connectivity Plan. Of these, the Commission expects the transit operators to continue to support the following:

1. Regional Transit Connection (RTC) Discount Card Program – Provides identification cards to qualified elderly and disabled individuals for reduced fares on transit. Transit operators and MTC maintain memorandums of understanding about roles and responsibilities for program implementation. The RTC Discount Card is being incorporated into the Clipper® program
2. ADA Paratransit Eligibility Program – Consists of a regional application, a regional eligibility database administered by a transit agency on behalf of the region and universal acceptance across transit systems of all eligibility determinations. Transit operators have flexibility to tailor the application process to screen applicants to facilitate eligibility determinations.
3. Interagency ADA Paratransit Services – Establishes policies to promote a consistent approach to interagency paratransit passenger transfers (see Appendix A-4, Attachment 1).
4. Regional Transportation Emergency Management Plan – The Regional Transportation Emergency Management Plan (formerly know as the Trans Response Plan) is a framework to coordinate transit services during regional emergencies. Transit operators are required to participate in regional exercises to test the implementation of the plan. Transit agencies certify compliance through their annual State Transit Assistance (STA) funding claims process, and also address emergency coordination planning through their Short Range Transit Plans.
5. Regional Links/Express Bus/Feeder Bus Services – Regional Links include bus service across the Bay Bridge, Dumbarton Bridge, the San Mateo Bridge and the Richmond/San Rafael Bridge that has been incorporated into the Express Bus Services program funded with Regional Measure 2 (RM2), and will be monitored per RM2 requirements. Express Bus Services also include Owl Service which operates along the BART rail lines at night when BART is closed. Express feeder bus services to/from BART stations during peak periods are maintained through direct allocation of BART's STA funds to transit agencies as specified in the annual Fund Estimate. If STA is unavailable, BART's General Fund up to $2.5 million is available to support these services per existing agreement. If additional funding is needed, it will be subject to discussion on an annual basis.

Appendix B-4, Attachment 1
Requirements for Interagency ADA Paratransit Services

Note: Transit operators developed guidelines for interagency ADA paratransit services. MTC adapted these guidelines for the purpose of defining coordination requirements.

Consistent with the Americans with Disabilities Act (ADA) requirement to provide paratransit services that are complementary to fixed-route transit services, Bay Area transit operators have identified a transfer-oriented network of interagency paratransit services. Interagency paratransit trips may require a transfer between connecting paratransit providers at a location specified by the transit operator. The following regional requirements are intended to improve connections between paratransit services for both passengers and paratransit providers. The requirements establish regional protocol for how the system will operate as well as specify the responsibilities of paratransit providers to assure an efficient, user-friendly system.

1. All public transit agencies in the San Francisco Bay Area will honor the regional ADA Eligibility Process [as approved by transit agencies] when certifying an individual for ADA paratransit services.

2. Eligibility for an individual requesting interagency paratransit services will be verified through the ADA Paratransit Regional Eligibility Database.

3. Transit operators will develop and make available customer information on how to access and use interagency paratransit services. This information will be made readily available in accessible formats.

4. Interagency paratransit trips will usually require a transfer between connecting paratransit providers at a location specified by the transit operator. Transit operators will transfer passengers at designated transfer locations that, to the extent possible, are also used as fixed-route transfer sites. For operational efficiency or customer service quality, use of other transfer sites is not precluded. Operators will seek to establish transfer locations that are clean, safe, sheltered and well-lit with accessible telephones and restrooms nearby. Established interagency paratransit transfer locations on transit properties will be clearly marked with a consistent sign designed and adopted at the regional level.

5. For operational efficiency or customer service reasons, transit operators may:

    - transfer passengers to a connecting paratransit provider at a transfer location, including having the passenger wait without assistance until the connecting provider arrives; or
    - provide through-trip service into an adjoining transit agency's service area (not requiring a transfer); or

- provide transfer assistance to passengers at transfer points (waiting with the passenger until connecting provider arrives); and
- coordinate their schedules and dispatch procedures with connecting provider(s) on the day of service.

6. Coordinating Bay Area interagency paratransit reservations shall be the responsibility of paratransit providers. Subject to availability of rides, a single transit coordinator will be responsible to schedule an interagency paratransit trip (including round-trip service). For trips requiring coordination between only two transit operators, the operator in whose jurisdiction the trip originates will usually perform the function of trip coordinator to schedule the entire trip and to serve as a point of contact for passenger inquiries. For trips involving three or more paratransit providers, a regional trip coordinator may perform these functions.

7. Transit operators shall accept reservations for interagency paratransit trips according to their local advance reservation policies. When coordinating a trip, the shorter advance reservation period of the connecting agencies will apply. In some cases, the scheduling operator will be unable to determine the availability of a requested interagency paratransit trip until the shortest advance reservation period is open. If, due to differences in advance reservation periods, trip availability cannot be determined at the time the trip is requested, the scheduling operator will inform the passenger of when to call to complete the trip reservation process. In the meantime, the scheduling operator may book available legs of the requested trip according to local advance reservation policies.

8. Transit operators will charge a fare consistent with each individual operator's fare payment policy. All fares will be communicated to the passenger by the operator scheduling the first leg of the interagency paratransit trip at the time the ride is confirmed. Operators and MTC will work toward a regional fare payment method and/or regional fare policy for paratransit services.