



METROPOLITAN
TRANSPORTATION
COMMISSION

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Memorandum

TO: Select Committee on Transit Sustainability

DATE: March 27, 2013

FR: Deputy Executive Director, Policy

W.I. 1517

RE: Inner East Bay Comprehensive Operational Analysis

Staff recommends the Select Committee refer Resolution No. 4060, Revised to the Commission for approval to incorporate the Inner East Bay Comprehensive Operational Analysis (COA) recommendations, as described in this memorandum and presentation slides.

Inner East Bay Comprehensive Operational Analysis

Early in the TSP process, the Commission identified the Inner East Bay as a strong transit market with capacity for further ridership growth and interagency coordination. An Ad-Hoc Committee of board members from AC Transit, BART and MTC provided direction to staff. In cooperation with AC Transit and BART, the Commission has developed a framework for addressing service improvements in the Inner East Bay including joint agency planning and coordination for Transbay services, service designs that reinforce spontaneous use in the urban core, and a joint fare product pilot program.

The Inner East Bay COA was developed to promote a seamless Inner East Bay bus and rail transit system. Specific recommendations are outlined below and detailed in the attached presentation.

BART Service Recommendations for the Inner East Bay

1. Change the dominant BART role from commute to Urban Metro integrated with the Inner East Bay bus network.
2. Implement capacity utilization strategies.
3. Ensure Title VI/Environmental Justice considerations are addressed in both service quality and coverage.

AC Transit Service Recommendations for the Inner East Bay

1. Focus resources on key urban trunk corridors to provide “spontaneous use” Metro network.
2. Redefine “coverage service” or service that provides basic access to transit regardless of ridership levels, as 30 minutes or higher.
3. Invest in service speed improvements.
4. Transbay pilots based on the following design options:
 - a. Current service model modified to improve productivity and cost effectiveness
 - b. Fast, frequent shuttles to BART stations
 - c. Augment BART with Transbay service
5. Ensure Title VI/Environmental Justice considerations are addressed in both service quality and coverage.

Joint Fare Product Pilot Programs Recommendation

Staff recommends implementing two pilot fare product programs to provide incentives for customers to use AC Transit and BART interchangeably. The pilots will test the concept that reducing transfer barriers between AC Transit and BART service allows customers to select the optimal mode for each trip. The evaluation of the programs will assess the tradeoffs between Inner East Bay fare revenue and ridership growth.

The first pilot would increase the current 25 cent discount to \$1 for customers transferring from AC Transit to BART. The second pilot would establish a \$1 discount on any trip that utilizes both systems. The pilots would be limited to several hundred participants each and utilize Clipper cards without any hardware or software changes to the Clipper system.

Staff intends to develop a funding and implementation plan for the Joint Fare Product Pilot Programs for consideration by the Programming and Allocations Committee later this summer.

Recommendation

Staff recommends the Select Committee refer Resolution No. 4060, Revised, to the Commission for approval.



Ann Flemer

Attachment

Date: May 23, 2012
Referred by: TSP Select Committee
Revised: 4/24/13-C

ABSTRACT
Resolution No. 4060

This resolution approves the recommendations of the Transit Sustainability Project.

This resolution was amended on April 24, 2013 to include the Inner East Bay Comprehensive Operational Analysis recommendations.

Discussion of the recommendations made under this resolution is contained in the Executive Director Memorandum presented to the Select Committee on Transit Sustainability on April 11, 2012 and March 27, 2013.

Date: May 23, 2012
Referred by: TSP Select Committee

Re: Transit Sustainability Project

METROPOLITAN TRANSPORTATION COMMISSION
RESOLUTION NO. 4060

WHEREAS, pursuant to Government Code § 66500 et seq., the Metropolitan Transportation Commission (“MTC”) is the regional transportation planning agency for the San Francisco Bay Area; and

WHEREAS, MTC develops a long-range Regional Transportation Plan (RTP), pursuant to Government Code §§ 66513 and 65080; and

WHEREAS, the last major update of the RTP, adopted in April 2009 (Transportation 2035 - MTC Resolution No. 3893), identified twenty-five year transit capital and operating shortfalls of \$17 billion and \$8 billion, respectively; and

WHEREAS, to address these shortfalls, as well as address immediate transit operators’ service reductions and budget shortfalls, to improve transit performance for the customer, and to attract more customers to the transit system, in January 2010, the Commission created the Select Committee on Transit Sustainability to guide the Transit Sustainability Project (TSP); and

WHEREAS, the TSP focused on three project elements: financial, service performance and institutional frameworks; and

WHEREAS, to inform the TSP, a Project Steering Committee was formed, made up of transit agency, government, labor, business, environmental and equity representatives to provide executive-level input into the project; and

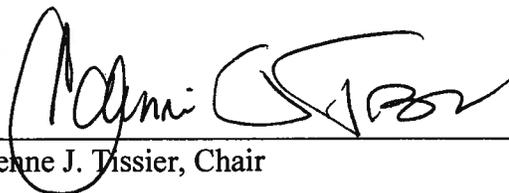
WHEREAS, additional input and guidance was received from the MTC Policy Advisory Committee, as well as from multiple public events and forums sponsored by interested parties; now, therefore, be it

RESOLVED, that based on project findings related to the financial and service performance of the Bay Area transit system, MTC approves the performance measures and targets and investment recommendations set forth in Attachment A to this resolution; and, be it further

RESOLVED, that based on project findings related to the financial, service performance, and institutional framework of the Bay Area transit system, MTC approves the policy recommendations set forth in Attachment B to this resolution; and, be it further

RESOLVED, that MTC will conduct periodic reviews of progress toward the performance targets and policy recommendation implementation.

METROPOLITAN TRANSPORTATION COMMISSION

A handwritten signature in black ink, appearing to read 'Adrienne J. Tissier', is written over a horizontal line.

Adrienne J. Tissier, Chair

The above resolution was approved by the Metropolitan Transportation Commission at a regular meeting of the Commission held in Oakland, California, on May 23, 2012.

Service, Paratransit and Institutional Recommendations

Service

- 1. Integrate bus/rail scheduling software to facilitate schedule coordination and customer travel planning. Establish a regional schedule change calendar.**

The Commission finds that schedule coordination between connecting agencies will increase the attractiveness of public transit but that connecting agencies make schedule changes on different dates and in some cases use incompatible scheduling software systems that make schedule integration difficult. This recommendation would align the schedule change calendar for major schedule changes among the region's operators and require all connecting operators to implement a compatible scheduling software system. Implementation would be subject to each transit agency's future scheduling system procurement timeline, and, for some agencies, may be subject to negotiation of changes to existing labor contract provisions that govern schedule change dates.

- 2. Conduct multi-agency Short-Range Transit Plans (SRTPs) at the county or subregion-level to promote interagency service and capital planning.**

The Commission has historically provided federal planning funds for each transit agency to independently prepare an SRTP of the agency's 10-year operating and capital plan. This recommendation would strengthen the joint planning that has begun in the region and recommend that transit agencies in a county or multi-agency travel corridor collaborate on a 10-year plan. The multi-agency SRTPs should develop capital replacement priorities and schedules, consider connectivity in service planning, establish fare policy consistency, establish common performance measures, and identify opportunities for shared functions. Future funding for SRTPs will take into account coordination opportunities.

- 3. Support transit agency operations on major corridors by requiring local jurisdictions to consider transit operating speeds and reliability in projects affecting these corridors.**

Travel time savings are a key component in building customer satisfaction and attracting new passengers. Under the Commission's proposed OneBayArea Grants program, local jurisdictions are required to adopt a complete streets resolution to be eligible for regional funding. Complete streets aims to consider all road network users including pedestrians, bicyclists and transit riders. MTC is further proposing to expand the scope of the Freeway Performance Initiative to include investments to improve transit operations on key arterial roadways.

4. Consider fare policies focused on the customer that improve regional/local connections.

Implement the Phase III Clipper requirements to revise existing operations and fare policies to a standardized set of business rules. Continue to work towards a more consistent regional standard for fare discount policies and minimize transfer penalties so that passengers can choose the most optimal route for their transit trip.

5. Recommendations specific to Marin, Sonoma, and Solano Counties

The Commission is committed to achieving more rational service delivery in geographic areas served by multiple transit agencies by supporting the collaboration, coordination and consolidation efforts already underway to bring them to implementation stage.

Sonoma: County-level SRTP work is underway in Sonoma County. MTC will provide funding to the Sonoma County Transportation Authority to collect customer opinion and demographic survey data to better inform service planning throughout the county.

Marin/Sonoma: The commencement of SMART service in Marin and Sonoma counties will alter transit travel patterns. This presents an opportunity to strengthen coordination and service planning among Marin and Sonoma transit providers serving the 101 Corridor and local connections. In coordination with the SRTP process, MTC will work with transit operators and the Marin and Sonoma County CMAs to develop a two-county corridor transit plan for submittal and presentation to the Commission.

Solano: County-level SRTP work is underway in Solano County. MTC will provide funding to the Solano Transportation Authority (STA) to complete the analysis to better inform service planning throughout the county. STA and the Solano transit operators are to use this process to identify service improvements, performance objectives and potential service functional and institutional consolidation opportunities.

6. Inner East Bay Comprehensive Operational Analysis

The Commission supports the following recommendations developed by AC Transit and BART for the Inner East Bay shared service area to: 1) promote a seamless Inner East Bay bus and rail system; 2) build the urban core to allow for spontaneous bus and rail network use by customers; 3) match bus and rail service levels with demand, focusing on improving service productivity while increasing overall system ridership; and 4) ensuring on-going financial sustainability.

BART Service Recommendations for the Inner East Bay

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Joint Fare Product Pilot Programs Recommendation

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Paratransit Cost Containment and Service Strategies

The Commission finds that transit agencies must consider strategies to contain the cost of ADA paratransit service using tools that are available to them individually or collectively. MTC expects individual agencies to consider the following strategies:

1. Fixed Route Travel Training and Promotion to Seniors

Expanding fixed route travel training – through mobility orientation sessions and one-on-one individualized training – would increase mobility for the users and help reduce growth of ADA paratransit demand. Ideally, training and outreach should be conducted before individuals apply for paratransit service or, at a minimum, should be made available during the process of determining eligibility for these services.

2. Premium Charges for Service Beyond ADA Requirements

Where transit agencies provide paratransit service that goes beyond what the ADA requires, they may charge extra for those "premium" services. For example, transit agencies that serve an entire jurisdiction (for example they may serve an entire city or taxing district) can define a "two-tiered" service area, with the first tier being the ADA required service area within $\frac{3}{4}$ mile of the fixed route service and the second tier extending to the jurisdictional limits. A higher fare can then be charged for trips in that second tier. The transit agency can also adopt

differing policies for that premium second tier, such as more limited service hours, denials of service once capacity is reached, and so forth.

3. Enhanced ADA Paratransit Certification Process

A robust certification process that includes in-person interviews as well as evaluations of applicants' functional mobility by trained professionals provides more accurate determinations of applicants' travel skills and may result in more applicants being referred to fixed route service based on their individual abilities. This may result in some reduction in ADA paratransit costs and also result in improving the mobility of riders due to the increased spontaneity afforded by fixed-route transit. Depending on the transit agency, available cost savings range from none to substantial. One centralized regional process is not needed, but many transit agencies can enhance their processes. Some smaller agencies could combine this function for efficiency and to support staff with specialized skills.

4. Implement Conditional Eligibility

Conditional eligibility finds that some applicants can use fixed-route service for at least some of their trips and specifies the particular conditions under which paratransit service is required. While this requires a more sophisticated eligibility certification process of conditional eligibility avoids ADA paratransit costs for those trips that ADA-eligible riders take on fixed-route service. Opportunities exist at several transit operators in combination with an enhanced eligibility process.

5. Creation of sub-regional Mobility Managers (e.g. CTSA) in one or more sub-regional area to better coordinate resources and service customers

National and local coordinated models exist and should be evaluated to deliver high quality and efficient paratransit services across transit agency boundaries and shared costs with social services. Several MTC programs, including Lifeline and New Freedom, have funded mobility management efforts to identify best practices and develop mobility management models for regional replication. The Commission will use the information from these efforts to recommend specific areas and agency leads for implementation of sub-regional mobility managers in the Bay Area.

6. Improve Fixed-Route Transit (per Plan Bay Area)

Continuous improvements to the fixed route system will shift some demand from paratransit to the fixed route system.

7. Walkable Communities, Complete Streets, and Land Use Planning (per Plan Bay Area)

The term “walkable communities” refers to communities that are pedestrian friendly, with sidewalks and pathways connecting residential areas with activity centers. Improving the “walkability” of a community is a more holistic approach to addressing ADA paratransit sustainability than other strategies. Similarly, planning efforts should, to the extent possible, ensure that senior housing and other senior-related facilities are sited in locations that are close to fixed-route services and close-in within the community and proximate to activity centers featuring shopping, medical and other services, as opposed to locations outside the community and isolated from activity centers. The ultimate impact of this recommended strategy is very large, even though this is a long-term strategy in which transit agencies will only play a supportive role. It requires an active role from cities and counties.

An integrated land-use/transportation plan is the primary goal of Plan Bay Area, under development and scheduled for adoption in 2013. In addition, the proposed OneBayArea grant program seeks to reward local jurisdictions for building housing near transit and conditions funding on adherence to complete streets policies.

Institutional

1. Complete service consolidations for Soltrans and ferry services (Vallejo, Alameda-Oakland, and Harbor Bay).

Per the Solano Transit Consolidation Study conducted by the Solano Transportation Authority – the cities of Vallejo and Benicia have formed a joint powers authority (Soltrans) to operate their transit service as a consolidated system. Senate Bill 1093 called for the consolidation of Vallejo, Alameda-Oakland, and Harbor Bay ferry services under WETA. WETA has adopted a transition plan to guide the consolidation of all ferry service, except the Golden Gate ferry services. WETA is currently operating the Alameda-Oakland and Harbor Bay ferry service and set to assume Vallejo service in 2012. Soltrans has completed the initial stages of the consolidation. The Commission will support these agencies and monitor progress during the consolidation process and support Solano County to move forward to consider further consolidations as supported through local planning.

2. Pursue functional and institutional consolidation among smaller operators where supported by local planning and input.

Through the local planning process and, as transit agencies do coordinated planning and fare policy setting, the benefits of functional and institutional consolidation should be further evaluated. Work with Congestion Management Agencies and operators, focusing on Marin/Sonoma and Solano to continue to improve coordination and evaluate the benefits of

additional functional and/or institutional consolidation to improve the financial stability and service for the customer. The appropriateness of these efforts and timeline will be established based on local planning and input.

3. Integrate multiple transportation functions (transit operating, planning, sales tax, etc).

The importance of other transportation decisions, such as roadway projects and pricing, in the success and performance of the public transit system was highlighted throughout the TSP. Therefore, opportunities to better integrate these decision-making authorities should be explored. Currently, the Santa Clara Valley Transportation Authority is the one example of an agency in the region that serves as the sales tax authority, transit agency, and congestion management agency. Work with transit operators and Congestion Management Agencies to identify potential vertical integration opportunities and local support for such integration.

4. Expand regional capital project planning/design to include sharing existing expertise (e.g., BRT) and facilities (e.g., maintenance shops).

Several transit agencies and congestion management agencies in the region have developed robust expertise in capital project development and delivery. As new projects or systems are developed, expertise should be shared across transit agencies to optimize resources. Using Plan Bay Area project listings, MTC will identify specific upcoming projects that may benefit from a sharing of resources and convene a joint discussion of county CMAAs and transit agencies to identify specific projects and terms for sharing resources.

5. Formalize joint procurement of services and equipment.

Transit agencies currently have an informal process to monitor each other's bus purchases, allowing agencies to "piggy-back" on another Bay Area or national procurement. This reduces administrative costs of duplicative procurement processes and lowers the unit cost of the purchase because of the higher volume order. The TSP recommends that these joint procurements be strengthened and formalized.

The Commission will identify typical annual procurements (scope and cost) in addition to those included in the Regional Transit Capital Inventory (major capital replacements), convene transit agencies to identify strong candidate services and equipment for joint procurement, and work with transit operators to evaluate and implement joint procurement models.