



# TRI DELTA TRANSIT

Eastern Contra Costa Transit Authority  
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## APPENDIX A

# Agenda Item 7a Income-Based Transit Fare Discount Pilot Program Fare Equity Analysis

**Board of Directors Meeting**

Wednesday December 16, 2020



# TRI DELTA TRANSIT

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## **Income-Based Transit Fare Discount Pilot Program**

### **Fare Equity Analysis**

November 2020

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## Agency Information

Eastern Contra Costa Transit Authority (ECCTA) was formed in 1977 as a Joint Powers Agency (JPA) consisting of the cities of Antioch, Brentwood, Pittsburg and the county of Contra Costa. Oakley incorporated as a city and joined in 1999. ECCTA is governed by an eleven-member board of directors composed of two appointed by each of the mayors of Antioch, Brentwood, Oakley, and Pittsburg, two appointed by the Contra Costa County Board of Supervisors, and one member at large. ECCTA operates fixed-route and demand response service under the name "Tri Delta Transit" and contracts with a private company, First Transit, for the operation of the buses.

ECCTA provides nearly 2 million trips each year to a population of approximately 315,000 residents in the 225 square miles of Eastern Contra Costa County. Tri Delta Transit operates 14 local bus routes weekdays, 5 local bus routes on weekends and holidays, on-demand weekday shuttle service, and door-to-door bus service for senior citizens and people with disabilities.



ECCTA System Map

## Background and Purpose

The Metropolitan Transportation Commission (MTC) adopted Resolution No. 4320 in May 2018, establishing the framework for a 12- to 18-month pilot program to offer a 20 percent to 50 percent single-ride fare discount to eligible low-income adults for travel on:

- BART (20 percent discount)
- Caltrain (50 percent discount)
- Golden Gate Transit (50 percent discount; except trips within zones 2, 3 and 4)
- Golden Gate Ferry (50 percent discount)
- Muni (50 percent discount)

Known as Clipper START, the Regional Means-Based Transit Fare Discount Pilot Program allows adults who live in the Bay Area and whose annual earnings are up to 200 percent of the federal poverty level to qualify for fare discounts. MTC established the 200 percent of poverty threshold in 2001 to account for the Bay Area's high cost of living relative to nationally defined poverty thresholds. The Pilot Program requires riders to use Clipper for fare payment. Clipper is a reloadable contactless smart card used for electronic transit fare payment in the San Francisco Bay Area. Riders can apply for the free Clipper START card online or submit a paper application. Applicants need to provide proof of identity and proof of income, and those approved will receive a personalized Clipper START card that can be used for single-ride discounts on the participating transit agencies' systems. The Clipper START card calculates fare discounts automatically for single-ride trips paid with e-cash.

To qualify for the Pilot Program, an individual must be a resident of the San Francisco Bay Area, be 19-64 years old, not have an RTC Clipper Card for people with disabilities, and have a household income of 200 percent of the federal poverty level or less.

Seniors, disabled, and youth currently receive transit fare discounts at most transit agencies in the San Francisco Bay Area, that in most cases are greater than 20 percent and therefore, are not eligible for the Pilot Program.

The Pilot Program is centrally administered on behalf of all participating transit operators; and is subject to revision based on financial sustainability, efficiency and effectiveness.

Establishment of the Pilot Program followed a three-year study launched by MTC in 2015 to determine if a transit fare program based on household income would be feasible and effective. This Regional Means-Based Transit Fare Pricing Study included three main objectives:

- Make transit more affordable for low-income residents
- Move toward a more consistent regional standard for fare discounts
- Develop implementation options that are financially viable and administratively feasible

Data from the Pilot Program will be used to evaluate and determine the feasibility of a permanent program.

ECCTA would like to join the Pilot Program to offer a 20 percent single-ride general public fare discount to eligible low-income adults (age 19-64) for travel on ECCTA fixed route and Tri MyRide demand response buses. This report analyzes a proposed new fare type that offers a 20 percent discount per single-ride trip on general public ECCTA fares for adult riders (age 19-64) with incomes at or below 200 percent of the federal poverty level.

This analysis is undertaken in connection with Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color, or national origin. While low-income passengers are not a protected class under Title VI, the Federal Transit Administration (FTA) requires recipients to evaluate proposed service and fare changes to determine whether low-income passengers will bear a disproportionate burden of the changes. It is important for fare equity analyses to examine both scenarios where minority and low-income passengers may bear a greater share of negative impacts, or experience a lesser share of positive impacts than non-minority and non-low-income passengers. Accordingly, the FTA has adopted regulations and reporting compliance requirements for agencies that receive federal financial assistance to ensure that the programs and activities of each respective agency comply with the requirements of Title VI.

FTA requires a fare equity analysis for all fare changes regardless of the amount of increase or decrease, on the entire system, on certain transit modes, or by fare payment type or fare media. As the proposed duration of the Pilot Program exceeds six months, to ensure compliance with federal and state civil rights regulations, including Title VI of the Civil Rights Act of 1964, ECCTA has performed this equity analysis using FTA-approved methodology.

MTC Resolution No. 4320 and the Regional Means-Based Transit Fare Pricing Study is in the appendix.

## **ECCTA Disparate Impact and Disproportionate Burden Policy**

The Disparate Impact and Disproportionate Burden Policy was developed pursuant to the FTA Title VI Circular 4702.1B, following a public participation process, and adopted by the ECCTA Board of Directors on April 22, 2015. The Disparate Impact and Disproportionate Burden Policy was re-affirmed by the ECCTA Board of Directors on February 26, 2020. The purpose of the Disparate Impact and Disproportionate Burden Policy is to define when impacts of a major service change or a fare change result in disparate impacts or disproportionate burdens on protected populations or passengers, defined as minority or low-income populations or passengers. A finding of disproportionate impacts would determine whether ECCTA may need to take additional steps to avoid, minimize or mitigate impacts.

The policy defines a disparate impact as a neutral policy or practice that disproportionately and adversely affects members of a group identified by race, color, or national origin. Further the policy defines a disproportionate burden as a neutral policy or practice that disproportionately and adversely affects low-income populations.

The fare equity analysis will use the following policies and thresholds to assess the impacts of the Regional Means-Based Transit Fare Discount Pilot Program.

### *Threshold for Disparate Impact and Disproportionate Burden*

The policy provides a process and threshold for determining if a disparate impact or disproportionate burden has resulted from a service change or fare change. In assessing disparate impact and disproportionate burden, ECCTA determines adverse impact based on a threshold that compares benefits and adverse impacts. The following definitions apply to determine if a disparate impact or disproportionate burden may exist.

1. For adverse effects or service decreases, a disparate impact or disproportionate burden will occur when the protected population impacted by service decreases is greater than 10 percentage points above the percentage of the protected population system wide.
2. For benefits or service increases, a disparate impact or disproportionate burden will occur when the protected population impacted by service benefits is less than 10 percentage points below the percentage of the protected population system wide.

### *Major Service Change Policy*

The ECCTA Board of Directors approved the updated Major Service Change Policy on February 26, 2020. The following defines a major service change or fare change, with exceptions also noted.

1. A transit route is added or eliminated; or
2. A reduction or increase of 25 percent or more in total vehicle revenue miles in service on any specific route over a one month period; or
3. A change in the routing of a bus route, when it is in service that alters 40 percent or more of the route's path.

Exceptions to the "major service change" include the following.

- Standard seasonal variations in service.
- Experimental or emergency fare changes may be instituted for six months or less without an equity analysis being completed; Experimental or emergency service changes may be instituted for twelve months or less without an equity analysis being completed.
- Changes to a route with productivity that is fifty (50) percent or below 18 passengers per revenue hour (Tri Delta Transit productivity standard) in a typical service day are not considered "major," unless service on that route is eliminated completely on any such day. Productivity refers to the number of passengers carried per revenue hour or per trip.
- Restoration of service previously eliminated due to budget constraints, provided the service runs on the same route as it had prior to its elimination, subject to minor deviations that do not exceed the requirements of (1), (2), or (3) above.

Any change in fare requires a fare equity analysis. The proposed Pilot Program uses the Clipper START card, a new fare type that provides the 20 percent single-ride general public fare discount to eligible low-income adult riders (age 19-64). ECCTA will assess whether the new fare type in the Pilot Program creates a disparate impact on minority riders and/or a disproportionate burden on low-income riders using ECCTA's Disparate Impact and Disproportionate Burden Policy.

Should ECCTA find that minority riders experience disparate impacts from the proposed fare change, ECCTA will take steps to avoid, minimize, or mitigate disparate impacts. If the additional steps do not mitigate the potential disparate impacts on minority riders, pursuant to FTA Title VI Circular 4702.1B, ECCTA can only proceed with the proposed change if ECCTA can show that:

- A substantial legitimate justification for the proposed fare change exists; and
- There are no alternatives serving the same legitimate objectives that would have a less disparate impact on minority populations.

Should ECCTA find that low-income riders experience a disproportionate burden from the proposed fare change, ECCTA will take steps to avoid, minimize, or mitigate impacts where practicable. ECCTA shall also describe alternatives available to low-income populations affected by the proposed fare change.

## Existing Conditions

### Clipper Fare Type Available on Fixed Route Buses

The following Clipper fare types are currently available for use on ECCTA's fixed route buses:

- Clipper card
  - Adult Clipper card
  - Senior Clipper card
  - Youth Clipper card
  - Disabled Clipper card (Regional Transit Discount Card)

When Clipper is installed on Tri MyRide demand response buses, all Clipper cards will also be available for use on Tri MyRide buses.

### Table 1: Adult Clipper Single-Ride General Public Fixed Route Fare Cost

Table 1 summarizes existing Adult Clipper single-ride general public (age 19-64) fare cost on ECCTA fixed route buses. When Clipper is installed on Tri MyRide demand response buses, the Adult Clipper single-ride general public fare cost will be \$2.00.

Adult Clipper Single-Ride General Public (age 19-64) Fare Type	Cost
Adult Clipper local route single-ride fare	\$2.00
Adult Clipper BART transfer local route single-ride fare	\$1.25
Adult Clipper route 200, 201 single-ride fare	\$2.50
Adult Clipper route 200, 201 BART transfer single-ride fare	\$1.75
Adult Clipper Day Pass Accumulator	\$3.75

### Table 2: Single-Ride General Public Fare Payment Methods by Fare Type on ECCTA Fixed Route Buses

Table 2 summarizes the existing adult single-ride general public (age 19-64) fare payment methods by fare type currently available on ECCTA fixed route buses. Currently cash and the mobile ticketing app are existing adult single-ride general public fare payment methods available on Tri MyRide demand response buses.

Adult Single-Ride General Public (age 19-64) Fare Payment Methods by Fare Type
Adult Clipper Card
Cash
Magnetic Swipe Tickets
Mobile Ticketing App



## Proposed Change to Fare Type and Fare with Pilot Program

With the proposed Pilot Program, ECCTA will offer a 20 percent single-ride general public fare discount to eligible low-income adults (age 19-64) for travel on ECCTA fixed route and Tri MyRide demand response buses with the Clipper START card.

### Proposed Clipper Fare Type for Fixed Route Buses

The Clipper START card will be a new fare type available for use on ECCTA's fixed route buses. When Clipper is installed on Tri MyRide demand response buses, the Clipper START card will also be available for use on Tri MyRide buses.

- Clipper card
  - Adult Clipper card
  - Senior Clipper card
  - Youth Clipper card
  - Disabled Clipper card (Regional Transit Discount Card)
  - Clipper START card

### Table 3: Proposed Clipper Fixed Route Single-Ride General Public (age 19-64) Fare Cost with Pilot Program

Table 3 summarizes the proposed Pilot Program's 20 percent single-ride general public fare discount for eligible low-income adults (age 19-64) on fixed route buses using the Clipper START card. When Clipper is installed on Tri MyRide demand response buses, the Adult Clipper single-ride fare cost will be \$2.00 and the Clipper START single-ride fare cost will be \$1.60.

Clipper Single-Ride General Public (age 19-64) Fare Type	Cost
Adult Clipper local route single-ride fare	\$2.00
<b>Clipper START local route single-ride fare</b>	<b>\$1.60</b>
Adult Clipper BART transfer local route single-ride fare	\$1.25
<b>Clipper START BART transfer local route single-ride fare</b>	<b>\$1.00</b>
Adult Clipper route 200, 201 single-ride fare	\$2.50
<b>Clipper START route 200, 201 single-ride fare</b>	<b>\$2.00</b>
Adult Clipper route 200, 201 BART transfer single-ride fare	\$1.75
<b>Clipper START route 200, 201 BART transfer single-ride fare</b>	<b>\$1.40</b>
Adult Clipper Day Pass Accumulator	\$3.75
<b>Clipper START Day Pass Accumulator</b>	<b>\$3.75</b>

### Table 4: Proposed Fixed Route Single-Ride Fare Payment Methods by Fare Type with Pilot Program

Table 4 summarizes the adult single-ride general public (age 19-64) fare payment methods by fare type available on fixed route buses with the proposed Pilot Program. When Clipper is installed on Tri MyRide demand response buses, cash, mobile ticketing app, and Clipper single-ride fare payment methods will be available for use on Tri MyRide buses.

<b>Adult Single-Ride General Public (age 19-64) Fare Payment Methods by Fare Type</b>
Clipper START card
Adult Clipper card
Cash
Magnetic Swipe Tickets
Mobile Ticketing App

## Fare Equity Analysis

The following section evaluates if the proposed Pilot Program new fare type will have a disparate impact and/or disproportionate burden on minority and/or low-income riders.

### Data Sources

To ensure compliance with Title VI regulations, the fare equity analysis used available information from the 2019 on-board passenger survey to assess whether the new fare type in the Pilot Program creates a disparate impact on minority riders and/or a disproportionate burden on low-income riders using ECCTA's Disparate Impact and Disproportionate Burden Policy.

The on-board passenger survey data was used to develop a detailed understanding of passenger demographics and fare payment by the Adult Clipper card. The survey was distributed on all ECCTA fixed routes and was weighted to reflect daily ridership levels. Passengers were selected for participation using a random sampling function built into the survey programming and passenger responses were captured in real time. The passenger-intercept interviews were completed using hand-held tablet personal computers (PCs) upon which the online survey was administered. Interviewers were required to adhere strictly to the random sampling protocol and were at no time permitted to exercise personal discretion with regard to the selection of survey subjects. The customer was able to select their language choice for the survey and Spanish speaking interviewers were also available to administer surveys. A paper version of the 2019 on-board passenger survey instrument is included in the appendix.

Minority definition- For the purposes of this analysis, minority is defined as all races/ethnicities besides White, non-Hispanic.

Low-income definition- ECCTA defines the low-income populations as those who are at or below 200 percent of the poverty level established for households by the US Department of Health and Human Services (HHS) poverty guidelines. ECCTA's definition is more inclusive of low-income populations than the HHS guidelines to account for the higher living costs in the Bay Area compared to most of the rest of the United States. This definition takes into account both the household size and household income of survey respondents. The combinations of household size and income that are defined as "low-income" are shown in Table 5.

**Table 5: 2020 Federal\* Poverty Guidelines**

2020 Federal* Poverty Guidelines		
Household Size	Poverty Guideline (Federal)	200%
1	\$12,760	\$25,520
2	\$17,240	\$34,480
3	\$21,720	\$43,440
4	\$26,200	\$52,400
5	\$30,680	\$61,360
6	\$35,160	\$70,320
7	\$39,640	\$79,280
8	\$44,120	\$88,240

\*For the 48 Contiguous States and the District of Columbia

Source: US Department of Health & Human Services

## Method of Fare Payment by Fare Type

Using data from the 2019 on-board passenger survey, the Adult Clipper card method of fare payment and the demographic characteristics of each passenger were analyzed.

Table 6 summarizes the method of fare payment by Adult Clipper card using the 2019 survey data.

**Table 6: Method of Fare Payment by Adult Clipper Card**

Method of Fare Payment by Demographic Group									
Fare Type	Minority	Percent Minority	Non-Minority	Difference		Low-Income	Percent Low-Income	Non-Low-Income	Difference
Adult Clipper card	228	76.25%	71	1.59%		184	70.23%	78	16.18%
All Riders System Wide	554	74.66%	188	-		334	54.05%	284	-

As the table above shows, data indicates that ECCTA's overall ridership is 54.05% low-income. Low-income riders paying fare with the Adult Clipper card total 70.23%. This is a difference of 16.18%. This difference exceeds the Disparate Impact/Disproportionate Burden Policy threshold of 10% for service benefits, which indicates there is not a disproportionate burden because a greater number of low-income riders benefit from the discount. Since every eligible low-income rider is able to get the free Clipper START card to receive the new benefit of a 20 percent single-ride general public fare discount, introduction of the new fare type would not place a disproportionate burden on ECCTA's low-income riders.

Data also indicates that ECCTA's overall ridership is 74.66% minority. Minority riders paying fare with the Adult Clipper card total 76.25%. This is a difference of 1.59%. This difference is within the Disparate Impact/Disproportionate Burden Policy threshold of 10% for service benefits, which indicates introduction of the new fare type would not place a disparate impact on ECCTA's minority riders.

## Public Engagement

The public engagement activities related to the fare equity analysis were conducted before implementation of the Pilot Program. The outreach provided an opportunity to both educate and to collect input from the community and riders on the proposed Pilot Program for eligible low-income adult riders, including minority and low-income populations.

Information was communicated in both English and in Spanish. Spanish is the identified Limited English Proficiency (LEP) language in ECCTA's service area.

ECCTA engaged the public through the following activities:

- Website- [www.TriDeltaTransit.com](http://www.TriDeltaTransit.com) communicated information about the proposed Pilot Program, the virtual public hearing, and how to provide comments through a banner, web page, and a news notification. The news notification was also sent by text message and email to customers and Community Based Organizations. The English virtual public hearing was online at [www.trideltatransit.com/publichearing/default.aspx](http://www.trideltatransit.com/publichearing/default.aspx) and the Spanish virtual public hearing was online at [www.trideltatransit.com/publichearing/default\\_esp.aspx](http://www.trideltatransit.com/publichearing/default_esp.aspx). The virtual public hearing webpages are in the appendix.
- Social Media- ECCTA's Twitter and Facebook account were used to communicate information about the proposed Pilot Program, the virtual public hearing, and how to provide comments. Additionally, information about the virtual public hearing was included in an electronic newsletter and in a Tri MyRide passenger notification.
- A public notice was placed in *The East Bay Times*, *The Press*, and *The Antioch Herald* local newspapers to inform the community of the virtual public hearing. A press release communicated information to the community about the proposed Pilot Program, the virtual public hearing, and how to provide comments. The legal notice is in the appendix.
- On-board poster- Information about the proposed Pilot Program, the virtual public hearing, and how to provide comments was placed on-board all ECCTA fixed route and Tri MyRide buses.
- Notice of Public Hearing- information about the proposed Pilot Program, the virtual public hearing, and how to provide comments was sent to the following Community Based Organizations in ECCTA's service area: libraries, chambers of commerce, La Clinica, Ambrose Recreation Center, City of Antioch, City of Pittsburg, City of Oakley, City of Brentwood, Contra Costa Health Clinic, Kaiser, John Muir Medical Center, Sutter Delta Medical Center, Medi-Cal offices, employment and human services, general assistance program offices and Contra Costa employment offices. The notice of public hearing and letter are in the appendix.
- Dedicated phone number- A dedicated phone number provided information on how to request a copy of the public hearing presentation and an option to leave a public comment.

Due to COVID-19, the Health Officer of Contra Costa County ordered all individuals living in the county to shelter at their place of residence, except to leave to provide or to receive certain essential services or engage in certain essential activities and work for essential businesses and governmental services, effective 12:01am on March 17, 2020 until 11:59pm on April 7, 2020. The shelter in place was then extended until 11:59pm on May 3, 2020 and

extended again until 11:59pm on May 31, 2020. With Contra Costa County still experiencing a significant increase in community transmission and illness from COVID-19 and the Health Officer of Contra Costa County imposing additional restrictions on certain businesses and activities that were previously cleared for operation on July 11, 2020, ECCTA scheduled a virtual public hearing.

The virtual public hearing was held from October 14, 2020 to November 15, 2020. Individuals were encouraged to comment or to submit questions online or by email, telephone, fax, mail or in-person. ECCTA's website ([www.TriDeltaTransit.com](http://www.TriDeltaTransit.com)) communicated information about the proposed Pilot Program, the virtual public hearing, and how to provide comments.

## Public Input

The public engagement process allowed ECCTA to gather community and rider feedback regarding the proposed Pilot Program. Public comments were collected from the community and riders. Comments were collected online, by email, telephone, fax, mail or in-person.

Comments collected, which totaled three, are summarized below:

- A customer had a question about why the Pilot Program reduced fare was not for seniors as well. ECCTA staff followed up with the customer and let her know that seniors already receive a reduced fare for travel on ECCTA buses and the senior discount is greater than the 20 percent discount for eligible low-income adult riders in the Pilot Program. The customer appreciated the follow up and the good deal that seniors get on the bus. She also thanked Tri Delta Transit for the wonderful drivers and service.
- A customer called twice, the first time requesting a copy of the virtual public hearing presentation and requesting a call back because she had some questions. She stated that she thought the program would be really beneficial because a lot of people are still on unemployment and the buses will no longer be free. She was hoping the program would go forward. The customer called a second time to comment on the Clipper START online application process, which she found not user friendly and difficult to upload documents. She stated that a paper application could only be picked up at Lake Merritt. ECCTA staff followed up with the customer and mailed a copy of the virtual public hearing presentation. Staff is looking into what paper application options MTC provides.

## Conclusion

ECCTA conducted a fare equity analysis to determine if the proposed Pilot Program offering a 20 percent single-ride general public fare discount to eligible low-income adults (age 19-64) for travel on ECCTA fixed route and Tri MyRide demand response buses with the Clipper START card resulted in a disparate impact on the basis of race, ethnicity, or national origin, and/or a disproportionate burden on low-income households.

Based on this analysis, ECCTA determined that introduction of the Pilot Program would not place a disproportionate burden on low-income riders or a disparate impact on minority riders.

## Appendix

### MTC Resolution No 4320 and Regional Means-Based Transit Fare Pricing Study

RE: Regional Means-Based Program Framework

METROPOLITAN TRANSPORTATION COMMISSION  
RESOLUTION NO. 4320

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

WHEREAS, transit affordability has been highlighted as a regional issue in MTC's Coordinated Plan, Plan Bay Area and other plans;

WHEREAS, MTC has conducted the Regional Means-Based Fare Pricing Study;

WHEREAS, the MTC recommends adopting a regional framework for the program, with participating operators, funding guidelines, and program conditions, as shown in Attachment A;

RESOLVED, that MTC approves Regional Means Based Fare Program Framework, subject to the conditions noted therein; and, be it further

RESOLVED, that MTC may annually allocate regional funds to support the Regional Means Based Fare Program per the respective funding program guidelines.

METROPOLITAN TRANSPORTATION COMMISSION

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Jake Mackenzie, Chair

The above resolution was approved by the Metropolitan Transportation Commission at a regular meeting of the Commission held in San Francisco, California, on May 23, 2018.

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*Draft Final*

# Regional Means-Based Transit Fare Pricing Study

## Project Overview Report

### Draft Final

Prepared for



METROPOLITAN  
TRANSPORTATION  
COMMISSION

375 Beale Street  
San Francisco, California 94105

March 13, 2017



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## Introduction

The goal of the Metropolitan Transportation Commission's Regional Means-Based Transit Fare Pricing Study is to answer three interrelated questions:

- Is there a way to make transit more **affordable** for the Bay Area's low income residents?
- How can the region best move towards a more **consistent regional standard** for fare discount policies?
- Is there a transit affordability solution that is **financially viable and administratively feasible**, and does not adversely affect the transit system's service levels and performance?

In pursuit of these goals, this study has developed a range of scenarios for implementing a regional means-based transit fare program in the nine-county San Francisco Bay Area. This study considered the feasibility of implementing and funding these scenarios.

MTC has been involved in identifying affordability barriers to transit and promoting solutions through regional policy initiatives for more than ten years. These include the Coordinated Public Transit-Human Services Transportation Plan, the Lifeline Transportation Program, and the 2012 means-based fare discount funding requests, the Regional Transportation Plan, the Transit Sustainability Project, and the Community Based Transportation Planning Program. Although MTC does not determine specific fare policies for individual transit operators, MTC does have statutory authority to promote regional transit and fare coordination.

## Study Methodology and Stakeholder Involvement

MTC staff established the study goals as part of the RFP process initiated in the second half of 2014. In March 2015, MTC retained the CH2M team as lead technical consultant to conduct research, provide quantitative and qualitative analysis, support community outreach, and document findings in accordance with the defined scope and work plan.

The questions posed in the study goals have been addressed in a series of four technical memorandums, each with a distinct focus:

- Technical Memorandum #1: Existing Policies and Conditions
- Technical Memorandum #2: Alternative Fare Scenarios
- Technical Memorandum #3: Evaluation of Alternative Fare Scenarios
- Technical Memorandum #4: Preferred Alternative Fare Scenarios

A Technical Advisory Committee (TAC) was established early in the study to provide initial input and subsequent feedback on each of the technical memorandums. The TAC consists of a broad-based group of stakeholders including representatives from the Alameda-Contra Costa Transit District (AC Transit), the Alameda County Social Services Agency Workforce and Benefits Administration, Bay Area Rapid Transit District (BART), the Contra Costa County Employment and Human Services Department, Marin Transit, Petaluma Transit, San Francisco Municipal Transportation Agency (SFMTA), San Jose State University's Mineta Transportation Institute, Urban Habitat, and the Santa Clara Valley Transportation Authority (VTA).

The TAC met four times over the course of the study, between May 2015 and December 2016, to review each of the four technical memorandums. TAC members also provided assistance with data collection.

Regional Means-Based Transit Fare Pricing Study:  
Project Overview Report – DRAFT FINAL

Early in the study, meetings and telephone interviews were also conducted with representatives of health and human service agencies serving Bay Area low income communities, as part of the process for understanding current needs and structuring low income program alternatives. Later, two community focus groups were assembled as part of the Evaluation of Alternative Fare Scenarios – one in San Jose and one in Vallejo. Low income riders were asked to articulate their needs for discount transit fare products, and their opinions regarding the products and policies being considered. In addition, MTC staff conducted interviews with low-income residents of San Francisco and the East Bay to help identify transit-affordability barriers for low-income residents of these communities.

Research on peer low income programs was conducted early in the study and the results are summarized in *Technical Memorandum #1, Policies and Conditions*. This report provided a summary of low-income discount programs in the Bay Area, including the SFMTA Lifeline program and VTA's Uplift program. It looked further at 21 peer agencies and identified six agencies with specific low-income programs, located in Chicago, Dallas, Los Angeles, Portland, Salt Lake City, and Seattle.

For technical analysis, the ridership and revenue impacts of each affordability and revenue-generating scenario were evaluated using FARES, CH2M's fare analysis model, as described in *Technical Memorandum #3, Evaluation of Alternative Means-Based Transit Fare Scenarios*. Key assumptions and data sources used in quantitatively evaluating ridership and revenue impacts include:

- Ridership and fare revenue impacts were analyzed by market segment, i.e., rider groups characterized by rider category (adult, senior/disabled, youth, etc.) and income (e.g., low income adult, non-low income senior) for AC Transit, BART, Caltrain, Golden Gate, SFMTA, SamTrans, and VTA and Marin Transit.<sup>1</sup> For the remaining 16 agencies, ridership and fare revenue impacts were estimated only for "low income" and "non-low income" rider groups and not distinguished by rider category.

On-board survey results provided by MTC were used to estimate the percentage of low income riders by transit operator. For the purposes of this study, and consistent with previous MTC studies, **a low-income Bay Area resident is defined as having a household income less than 200% of the Federal Poverty Level (FPL)**. In the absence of consistent household size data in transit operator surveys needed to determine an individual's income in relation to the Federal Poverty Level, **an annual household income of \$35,000** (which approximates 200% of the Federal Poverty Level for an average Bay Area household size, which is between two and three persons) was generally used as the low-income-fare eligibility threshold.

- The FARES model uses elasticities to estimate the impact of a fare change on ridership. For example, if a fare elasticity is assumed to be  $-0.33$ , a 10% increase in fare price will result in a 3.3% decrease in ridership, and vice versa — a 10% decrease in price will result in a 3.3% increase in ridership. It is generally assumed that lower-income riders are more sensitive to price and therefore their price elasticities are higher, while higher income riders tend to be less sensitive to price and exhibit lower price elasticities.
- The CH2M FARES model was used to calculate **maximum** potential program adoption and resulting program cost (revenue loss). Using local survey data and statistics on qualified riders, the study has established an upper limit on potential cost based on 100% adoption rates. However, in practical terms, the SFMTA estimates that only 40.5% of eligible riders have

<sup>1</sup> In the past, Golden Gate Transit provided much of Marin Transit's service and performance data reported by MTC combined the two agencies. As a result, Marin Transit was included with Golden Gate among the transit providers that were analyzed at the market segment level.

enrolled in its Lifeline program, while only 20.7% actively purchase Lifeline monthly passes. So it is reasonable to assume that not every qualified rider will take advantage of a low income fare program (and thus that actual costs would be lower than the maximum), but there is no firm basis to estimate how much below the maximum costs might be at the regional scale.

## Existing Policies and Conditions

*Technical Memorandum #1: Existing Policies and Conditions* provides the results of the first phase of the study, an existing conditions analysis that included:

- Discussions with Bay Area social service agencies
- Review of existing means-based fare discounts offered by Bay Area transit providers
- Research into other means-based pricing and transit affordability programs in the Bay Area and North America.

Technical Memorandum #1 also includes a statement of the project goals and the results of discussions of project objectives with study stakeholders and potential performance measures for use in assessing how well proposed policy changes meet study goals and objectives.

The key findings of this Policies and Conditions background review served as the foundation for crafting preliminary means-based transit fare scenarios for the Bay Area in the next task of this study. High-level findings from the existing conditions research include:

- **The region's four largest transit agencies (SFMTA, AC Transit, BART, and VTA) account for 90% of the region's transit trips.**
- **Transportation is the third-largest budget item for low income households in California's metropolitan areas.** For low income households, only housing and food expenditures constitute larger budget shares than transportation expenditures, on average.
- **A majority of transit riders are low income.** Approximately half of Bay Area transit riders have a household income under \$25,000, and three-quarters have a household income under \$50,000. While three-quarters of disabled passengers have household incomes below \$25,000, only about half of seniors do.
- **Among Bay Area transit riders, the lowest income riders make shorter trips than higher income riders, traveling less than one-third the distance of the highest income riders.** Low income riders generally use local bus systems at higher rates while upper-income riders use the region's long-distance transit modes at higher rates.
- **Low income transit discount programs have evolved over time.** The broad variety of the programs that have been developed reflect the diversity of needs that transit operators have chosen to address. Transit agencies generally offer two categories of low income transit discount programs: bulk ticket sales programs and other low income programs. The programs are targeted at different populations. Bulk sales are generally not intended to address on-going needs, but rather are designed to meet immediate needs of specific users. Other low income programs (e.g., Free Muni, ORCA LIFT in the Seattle region) are intended to meet longer-term, ongoing needs of more general groups.

- **Health and social service organizations can be key partners in low income transit discount programs.** In the Bay Area, these organizations are key partners in both SFMTA's Lifeline and VTA's UPLIFT and TAP programs. School districts are also partners with transit operators in low income discount programs targeting Bay Area students (SFMTA, Marin Transit, and SolTrans). In addition, using social service agencies provides potential opportunities to help enroll participants into other programs, such as Medi-Cal and CalFresh. Opportunities also exist to streamline means testing by linking eligibility to existing programs, such as Medi-Cal or PG&E's CARE program for home energy costs.

MTC presented these findings to the Technical Advisory Committee (TAC) on May 28, 2015. In response to the findings in the memorandum, the TAC wanted to ensure that the study would also:

- Create a fare pricing and/or payment structure that is convenient and compliant with applicable regulations, including Title VI.
- Establish clear and consistent definitions of "low income" and "resident."
- Support transit operator farebox recovery and financial objectives to ensure the program can be successful and sustainable – and if needed, identify funding source(s) to offset revenue and cost impacts.
- Build consensus for a shared regional approach across Bay Area transit operators, social service agencies, community organizations, and external stakeholders.
- Ensure program scenarios are appropriate for the region's four largest transit agencies (SFMTA, BART, AC Transit, and VTA) that account for 90% of the region's transit trips.
- Support low income individuals who make up the majority of Bay Area transit riders and whose households rank transportation as their third largest expense, behind housing and food.<sup>2</sup>
- Establish a well administered means-based testing process to verify eligibility for low income programs, if required.
- Review existing discount programs to see how they currently support low income riders, whether their policy objectives are being met, or if those programs could be adjusted to better serve low income riders.
- Consider how to partner with Bay Area health and human services agencies.

## Developing Low-Income Fare Affordability Scenarios

**Technical Memorandum #1, Policies and Conditions**, established the existing conditions and demographics of low income transit riders. Informed by that memo and feedback from the TAC, the CH2M study team with MTC staff developed a wide-ranging set of preliminary low-income fare affordability scenarios for consideration by the TAC. Those draft scenarios were documented in **Technical Memorandum #2, Alternative Fare Scenarios**.

Eight different fare affordability scenarios were proposed, based on the overall program objectives, national peer examples, local expertise in Bay Area transit fare policy, and findings of the previous task.

<sup>2</sup> As discussed in Regional Means-Based Transit Fare Pricing Study Technical Memorandum #1: Policies and Conditions, Section 1.1.2 Literature Review.

Developing and reviewing these draft scenarios exposed three key requirements for a successful low income program:

- A clear and consistent definition of “low income” and “resident.”
- A fair means-based testing program to verify eligibility for low income programs.
- Pricing and payment that is convenient and compliant with applicable regulations (e.g., Title VI).

The second technical memo explores these challenges and considers the following “building blocks” for the alternative fare scenarios proposed:

- **Discount Structure:** What discount and/or other policy tool will be implemented?
- **Geographic Scope:** Which operators will participate? Will it be an opt-in program? Will there be a limited demonstration project? Will there be regional consistency in discounts offered?
- **Target Population & Income Threshold:** Who is the target market? What income threshold will be used to determine eligibility?
- **Means-Testing:** Who will conduct the means-testing if eligibility assessments are required?
- **Distribution:** How will the benefits or discounts be distributed?
- **Fare Media:** What media will be used to distribute the discounts (e.g., Clipper, paper)?

## Proposed Fare Affordability Scenarios

Seven scenarios were defined for making transit fares more affordable for low income riders in the Bay Area. An eighth scenario combined several of the affordability scenarios into a multi-pronged, high-impact “Big Idea” scenario. Key features of each preliminary scenario are described below.

### 1. The Big Idea

Combining several different approaches (of those described below in scenarios 2-8) into one “Big Idea” could result in a multi-pronged, high-impact scenario. One example of how several different approaches might be combined include:

- Discounted low income fares and/or pass program (see scenario #2)
- Peak/off-peak pricing (see scenario #3)
- Fare accumulators (see scenario #6)
- Eliminate non-mandated cash discounts (see Revenue Generating opportunity ‘A’)

### 2. Discounted Low Income Fares and/or Pass Program

Offering low income riders a region-wide discount (potentially 50%) on all fares and passes, whether paid by cash or Clipper®.

### 3. Discounted Off-Peak Fares

Offering all riders, regardless of income, a fare discount during off-peak hours. Two-thirds of low income riders travel during the off-peak while only half of higher income riders travel during the off-peak. This option minimizes program administration by offering discounts to all riders and eliminating the need for means-testing.

#### 4. Regional Interagency Pass

Similar to the BART/Muni Adult “A” Fast Pass, this scenario would establish a regional pass that would allow unlimited rides on multiple operators within a defined geographic area. An interagency pass provides the flexibility for riders to use multiple operators, facilitating interagency transfers while minimizing the cost to transfer. Based on rider survey data, low income riders are more likely to transfer to reach their final destinations. However, introducing a pass to facilitate interagency travel will not necessarily address the high upfront cost that may not be affordable for low income riders.

#### 5. Make Transfers More Affordable

Offering free, discounted, or time-extended interagency transfers would increase affordability of trips that require use of multiple operators in the absence of an interagency or regional pass. While offering a small discount on interagency transfers (e.g., \$0.50) does improve affordability, the fare for the entire trip may still create a financial burden to low income riders. Offering a day pass in lieu of intra-agency transfers would further increase affordability, especially on transit systems designed to require transferring to complete a trip.

#### 6. Monthly Fare or Trip Accumulators

Also referred to as fare capping, best fares, or “fair fares,” this scenario establishes a mechanism that allows low income riders to pay individual fares for each boarding up to a “cap,” at which time the rider automatically earns a monthly pass so that future rides during that month are free.

#### 7. Add Cash to Clipper Card for Low Income Riders

This scenario would provide a cash value, transit-only subsidy to low income riders who qualify. Transit agencies would not be required to make changes to their established fares.

#### 8. Increase Use of Existing Discounts/Reduce Barriers to Existing Discounts

Several transit operators offer discounted fares and/or passes (e.g., youth passes, senior/disabled passes, monthly passes) that are sometimes underutilized due to a variety of barriers. This scenario would identify those barriers and implement strategies to mitigate them.

### Proposed Revenue Generating Scenarios

The Affordability Scenarios outlined above are all intended to reduce fares paid by low income riders. Therefore, they are expected to reduce overall fare revenue for the transit agencies. While scenarios selected for further evaluation are not required to be revenue neutral, each scenario should be consistent with the study goal to be “administratively viable and financially feasible, and not adversely affect the transit system’s service levels and performance.” Therefore, complementary revenue generation strategies were developed to consider how lost revenue might be replaced.

In developing the revenue generating scenarios, the study team tried to identify new, non-traditional revenue opportunities that might make sense only once the region is committed to fully implementing a low income fare program.

#### A. Eliminate Non-Mandated Cash Discounts/Eliminate Proxies for Low Income

Consistent with federal law, the Federal Transit Administration requires its grantees to provide half-fare discounts for seniors, persons with disabilities, and Medicare cardholders on one-way fares during off-peak periods. Eliminating the discounts that transit agencies choose to offer that exceed these requirements could generate additional revenue. However, a low income program that ensured all low

income riders, regardless of rider category, had access to discounts might eliminate the need for these non-mandated discounts.

#### B. Eliminate Discounted Fare Products (e.g., Monthly Passes)

Additional revenue could be generated by eliminating fare products, such as monthly passes, that provide discounts to all riders, regardless of financial need. Transit operators have traditionally offered passes to provide discounts to their most frequent and loyal riders, and to simplify fare payment and fare collection. However, with Clipper, passes are no longer needed to simplify fare collection and eliminating these discounts could generate additional fare revenue.

#### C. Implement Fare Increases for Non-Low Income Riders

Additional revenue could be generated by implementing fare increases. Revenue increases from non-low income riders can help offset revenue losses from offering a low income program.

## Quantitative and Qualitative Evaluation

The TAC met with MTC staff and the CH2M study team on August 3, 2015, to review and provide feedback on the alternative fare and revenue scenarios. That feedback was considered in staff's decision to narrow and refine the alternatives, which were reviewed by MTC's Programming and Allocations Committee in December 2015. From the preliminary affordability and revenue generating scenarios outlined in Technical Memorandum #2, three fare affordability scenarios and two revenue generating scenarios were selected for further definition and analysis, and re-numbered as follows:

### Affordability Scenarios

- A1 – Discounted Fares and Passes for Low Income Riders
- A2 – Accumulator with Monthly Cap for Low Income Riders
- A3 – Cash on Clipper® for Low Income Riders

### Revenue Generating Scenarios

- R1 – Eliminate Non-Mandated Cash Discounts
- R2 – Implement Fare Increases

## Evaluation Results

Each of the five scenarios is described here in greater detail, including program-specific parameters as well as the results of qualitative and quantitative evaluations, which were provided in **Technical Memorandum #3, Quantitative and Qualitative Evaluation**.

Agency-specific and region-wide ridership and fare revenue impacts were developed for each scenario. Region-wide impacts are summarized below, under each scenario description. Agency-specific ridership and fare revenue forecasts assume full implementation and utilization of each low income program in Year 1 – in effect, defining the maximum potential impacts and exposure of each scenario. In actually implementing low income programs, other agencies have found that uptake is more gradual and their experiences as well the results of any pilot program could help scale a Bay Area program. This independent analysis conducted by CH2M was a sketch-level planning analysis based on publicly reported 2014 regional ridership and revenue data, published agency survey information, and some broad assumptions across all agencies. These “rough order of magnitude” estimates were intended to support early policy-level conversations. Thus, this fiscal impact analysis is not a program cost estimate,

which would require more detailed program definition and agency specific data inputs. Specifically, SFMTA and BART staff working with the TAC have stated that the scenario analysis from Technical Memorandum #3 does not reconcile with their ridership and revenue numbers. For example:

- SFMTA has conducted detailed analysis of its existing Lifeline program (which makes a discounted monthly pass available to low-income riders) and noted that their estimated annual fiscal impact is roughly \$8 million. In contrast, the three scenarios analyzed in this study (which differ significantly from the Lifeline pass) have fiscal impacts ranging from \$12-14 million annually.
- BART staff has stated that they believe the fiscal impact estimated to BART may be *understated* by \$3-7 million. They note that their revenue has increased significantly since 2014 (the most recent year data was available when the technical analysis was performed) and the impact to BART would be magnified accordingly.

Beyond specifics of individual operators, the “maximum impact” of a regionwide program can be a useful starting point for an initial policy discussion, but it is important to emphasize to policy makers that the likely future impact will be significantly less than this maximum (because a significant percentage of qualified riders will not take advantage of the program), or participation could be capped to any amount deemed feasible for any of the affordability scenarios.

The qualitative and quantitative analysis findings of each of the scenarios are as follows. For each scenario, the qualitative analysis examines the scenario outcomes to the three key study goals described in the Introduction.

#### A1.–Discounted Fares and Passes for Low Income Riders

Most transit operators currently offer discounted cash fares or pass products to seniors, persons with disabilities, and youth. This scenario would create an additional discount category for low income persons, which would allow individuals below a certain income threshold to pay fares or purchase passes at a discount.

#### Parameters

- 50% discount on all agency-specific cash fares and Clipper® stored value fares.

#### Advantages

- Offering specialized low income fares and passes and requiring eligibility assessments, similar to the Seattle region’s ORCA LIFT program, provides a way to offer discounted fares to a specific target population without requiring discounted fares for those who do not qualify.
- Clipper® cards would be issued as IDs to individuals who qualify for means-based fare discounts. The cards could be used only as proof of eligibility or for both identification and fare payment.
- Can be implemented by all Bay Area operators, regardless of fare structure, including those that do not offer pass products and those that are not yet on the Clipper® system.
- Extending the discount to cash and stored value fares as well as to monthly passes makes the discount affordable to as many riders as possible. Offering only a discounted pass (and not a trip-based cash or stored value discount) would not address the high up-front cost that may make monthly passes unaffordable for low income riders.



**Disadvantages**

- Riders who wish to use a Clipper® card to store value or discounted passes would need to be able to load value or products onto their cards in advance of use.
- It may be necessary to issue the Clipper® card with a photo if it is used to allow riders to obtain discounts on cash fares. While some programs, including Seattle's ORCA LIFT, have avoided using distinguishing IDs (such as photo IDs or differently colored cards), other agencies do require photos (e.g., Tucson's SunGo ID & Card).
- Bay Area transit operators have different base fares, pass multiples, and transfer policies. Implementation on a regional basis will require handling multiple price points, different service types/distances traveled (e.g., local bus vs. regional rail), and other different fare policies, making it difficult to implement across operators.

**Quantitative Analysis**

Maximum region-wide impacts were estimated as follows:

<b>A1 (Cash/Pass Discounts)</b>	<b>Annual Ridership Impact (millions)</b>	<b>Annual Fare Revenue Impact (millions)</b>
Low Income Riders	24.7	-\$79.6
Non-Low Income Riders	0.0	\$0.0
Total	24.7	-\$79.6

Note: Ridership and fare revenue forecasts assume unconstrained, full implementation and utilization in Year 1.

**Qualitative Analysis**

- Transit would become more affordable for the Bay Area's low income residents under this scenario. Based on these eligibility thresholds, this alternative is estimated to increase transit trips among low income riders by 24.7 million (4.7%) to 544.4 million annually, if fully implemented and utilized.
- This approach would achieve a more consistent regional standard of 50% discount on fares in the Bay Area, if it were adopted by all operators.
- The financial viability of this alternative will depend on the ability to cover fare revenue losses of up to \$79.6 million plus implementation costs.

**A2—Accumulator with Monthly Cap for Low Income Riders**

Accumulators are alternatives to pass products that cap fares or provide bonus trips based on a threshold (number of boardings or value of fares paid) within a defined period of time. Accumulators with monthly caps would allow riders to purchase pass products (e.g., monthly passes) in small increments rather than paying the full price of the pass up-front. For example, if the fare is \$2.50 and the monthly pass price is \$100, \$2.50 would be deducted from the rider's Clipper® card on each boarding until the \$100 "cap" is reached (with the 40th boarding). After that, all trips would be free for the rest of the month. In this scenario, fares would be capped on a monthly basis, and the cap would be set lower for low income riders than for the general population.

**Parameters**

- 50% discount on fare caps for low income riders on agency-specific fare accumulators.

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- Separate fare caps for low income riders and all other riders.
- Accumulators are agency-specific; inter-agency transfer and monthly pass agreements are not included.

#### Advantages

- Clipper® business rules would provide low income riders the best fare possible. Frequent riders have the ability to obtain unlimited travel advantages of a monthly pass even if they are unable to afford the upfront cost of a monthly pass.
- Even riders who do not qualify as low income may find an accumulator program beneficial because they are able to spread the cost of a monthly pass over the course of many boardings.
- While infrequent riders may not travel enough to reach the monthly cap, they also would not need to purchase a monthly product in advance and risk underutilizing it.

#### Disadvantages

- Fare capping primarily benefits those riders who travel frequently enough to reach the cap. Alternatively, instead of capping low income fares at half the cap for general public users, the per-trip fare could also be discounted by 50%.
- Fare capping would require a Clipper® card to pay fares using stored value, track fares paid toward the cap, and provide free trips once the cap is reached. Fare capping could not be provided to riders paying cash fares. Focus group participants observed that it would be a burden to access the discounts if they were limited to Clipper®.
- With accumulators and fare capping, agencies may lose revenue associated with riders who previously purchased monthly passes but underused them.
- Implementation of a monthly fare cap is not possible with the current generation of Clipper® due to memory limitations with the current Clipper® card. This scenario therefore is not viable until the roll-out of the next generation Clipper® system that is anticipated to start in 2019 at the earliest.
- The Bay Area transit agencies have different base fares, pass multiples, and transfer policies. Implementation of accumulators throughout the region will require handling multiple price points, different service types/distances traveled (e.g., local bus vs. regional rail), and other different fare policies, making it difficult to implement a single regional accumulator across all operators.
- Agencies that do not currently offer pass products may not wish to develop a low income pass product.

#### Quantitative Analysis

Maximum region-wide impacts were estimated as follows:

A2 (Fare Capping)	Annual Ridership Impact (millions)	Annual Fare Revenue Impact (millions)
Low Income Riders	23.3	-\$64.2
Non-Low Income Riders	0.0	\$0.0
Total	23.3	-\$64.2

Note: Ridership and fare revenue forecasts assume unconstrained, full implementation and utilization in Year 1.

### Qualitative Analysis

- Transit would become more affordable for the Bay Area’s low income residents. Based on these eligibility thresholds, this alternative is estimated to increase transit trips among low income riders by 23.3 million to 252.1 million annually, if fully implemented and utilized.
- This approach would achieve the goal of a more consistent regional standard for discounting fares in the Bay Area, if it was adopted by all operators. It would provide a consistent 50% discount on the price of a monthly pass to all eligible riders paying fares from Clipper® stored value, as well as the advantages of fare capping, which would provide the benefit of a monthly pass to riders who currently may be unable to afford one.
- The financial viability of this alternative will depend on the ability to cover fare revenue losses of up to \$64.2 million plus development and implementation costs.

#### A3—Cash on Clipper® for Low Income Riders

The Cash on Clipper® scenario would provide a transit-only “cash” subsidy to eligible low income riders by adding funds to the stored value on a Clipper® card, to match funds added by the rider, effectively providing a 50% fare discount on fares paid with stored value. The subsidy could take the form of a stored value credit to eligible riders’ Clipper® cards, similar to a pre-tax transit benefit. Other methods of value distribution besides Clipper®, such as paper-based commuter checks or benefits cards, could be developed but are not recommended.

#### Parameters

The scenario evaluated here assumes that stored value added by eligible riders would be matched dollar-for-dollar, with no cap on the bonus that could be added, effectively providing a 50% discount on pay-per-trip stored value usage. Under this scenario, subsidies would be provided by MTC from a regional pool of funds, not by individual transit agencies.

#### Advantages

- Riders are able to spend their Cash on Clipper® transit dollars on any/all transit agencies that accept Clipper®, thereby providing access to the entire regional transit system.
- This option accommodates established transit fares and fare structures. It requires no changes to transit agencies’ established fares and therefore may be more feasible to implement.
- Transit agencies could gain fare revenue from additional trips induced by the program (discounted fares would be paid by riders and matched by the regional funding pool).
- Implementation on Clipper® speeds the distribution of value, minimizes the transferability of value, and reduces the potential for fraud, but enables and requires tracking and monitoring to minimize fraudulent use.

#### Disadvantages

- There is a potential for fraud associated with the use of alternative methods of transit value distribution, such as more readily transferrable paper-based commuter checks or benefits cards, if the program is made available outside of Clipper®.

## Quantitative Analysis

Maximum region-wide impacts were estimated as follows:

A3 (Cash on Clipper®)	Annual Ridership Impact (millions)	Annual Fare Revenue Impact (millions)
Low Income Riders	26.1	-\$75.5
Non-Low Income Riders	0.0	\$0.0
Total	26.1	-\$75.5

Note: Ridership and fare revenue forecasts assume unconstrained, full implementation and utilization in Year 1.

For each operator, it is assumed that 70% of low income riders not currently using Clipper® would migrate to Clipper® to take advantage of the Cash on Clipper® program.

## Qualitative Analysis

- Transit would become more affordable for the Bay Area's low income residents. Based on these eligibility thresholds, this alternative is estimated to increase transit trips among low income riders by 26.1 million to 254.9 million annually, if fully implemented and utilized.
- Although Cash on Clipper® is designed to provide a consistent 50% discount to all eligible riders paying fare using Clipper® stored value, this approach would neither provide regional fare policy coordination nor simplify riders' fare payment experiences.
- The financial viability of the Cash on Clipper® alternative will depend on the ability to cover revenue fare losses of up to \$75.5 million plus implementation costs

### R1—Eliminate Non-Mandated Cash Discounts

This scenario would generate revenue to help fund a low income transit fare program by eliminating all fare discounts beyond those that comply with Federal requirements. Federal regulations require transit systems that use FTA formula funds, which includes virtually all Bay Area transit operators, to provide half-fare discounts to seniors (at a minimum, those riders who are age 65 and older), persons with disabilities, and Medicare recipients, but only during off-peak hours and on cash fares. There are currently no federal requirements for fare discounts for youth or low income persons.

Under this scenario, discounts beyond those that are federally mandated would be eliminated. However, many of those customers would become eligible for the low income program, thereby directing subsidies to those who need a discount – and collecting full fares from those that are not low-income.

### Parameters

- Federally-mandated half fare discounts available only on cash and Clipper® stored value fares and only during off-peak.
- Retain free/reduced fixed route fares for ADA paratransit eligible riders.
- No discounted passes for youth, seniors, persons with disabilities, Medicare recipients; other (full fare) passes and pass programs retained.

**Advantages**

- Reducing the number and variety of discounts offered provides funding for a low income program designed to address the needs of those who are financially most in need of transit fare discounts.
- Eliminating the variety of reduced fare programs simplifies fare policies, makes fare policies more consistent across the region in keeping with the overall goal of this study, and reduces administrative costs of managing several different discount fare programs.
- Retaining mandated discounts on fares paid using Clipper® stored value reinforces the use of Clipper® regionally as well as the use of a specially programmed low income Clipper® card to support a Bay Area low income program.
- Retaining free/reduced fares on fixed route services for riders who are eligible for ADA paratransit services encourages the use of lower cost fixed route services.

**Disadvantages**

- Requires action by each transit agency's policy board and may be extremely difficult to accomplish consistently on a regional basis.
- Limiting discounts to off-peak periods would require time-sensitive (peak/off-peak) pricing, which is currently neither part of the Clipper® functionality nor of many operators' fare-collection mechanisms, such as on-board fareboxes.
- May have a negative impact on transit ridership throughout the Bay Area.

**Quantitative Analysis**

Region-wide impacts were estimated as follows:

<b>R1 (Eliminate Discounts)</b>	<b>Annual Ridership Impact (millions)</b>	<b>Annual Fare Revenue Impact (millions)</b>
Low Income Riders	-13.0	\$30.4
Non-Low Income Riders	-7.5	\$22.9
<b>Total</b>	<b>-20.5</b>	<b>\$53.2</b>

Note: Ridership and fare revenue forecasts assume unconstrained, full implementation and utilization in Year 1.

**Qualitative Analysis**

- By providing revenue that would help to offset the fare revenue reductions that would occur with the implementation of a low income transit fare program, this approach would help to assure that transit would become more affordable and sustainable for low income Bay Area residents.
- By eliminating the many agency-specific discounts, this approach would assist in coordinating and simplifying the fare options offered across Bay Area transit agencies.
- Eliminating these discounts would increase fares for many transit users, thereby reducing transit use by nearly 21 million trips (approximately 4.1%).

**R2--Implement Fare Increases**

This scenario would consider the revenue generating effects of raising fares on all fare products throughout the region by 10%. It would always be paired with one of the Affordability Scenarios so the net impact would be to decrease fares for low income riders.

**Parameters**

- Increase all cash and non-cash fares by 10%
- Retain existing discounted fare options and products

**Advantages**

- Provides funding for a low income program designed to address the needs of those who are most in need of transit fare discounts.
- Maintains each agency's existing fare policies and structures.

**Disadvantages**

- Increases fares by 10% for all riders on all Bay Area transit systems, modes and routes.
- Increasing all fares by 10% will require action by each transit agency's policy board and may be difficult to accomplish on a regional basis.
- Increasing all fares by 10% may negatively impact Bay Area transit ridership.

**Quantitative Analysis**

Region-wide impacts were estimated as follows:

<b>R2 (10% Fare Increase)</b>	<b>Annual Ridership Impact (millions)</b>	<b>Annual Fare Revenue Impact (millions)</b>
Low Income Riders	-6.7	\$20.9
Non-Low Income Riders	-7.2	\$45.5
Total	-13.9	\$66.3

Note: Ridership and fare revenue forecasts assume unconstrained, full implementation and utilization in Year 1.

**Qualitative Analysis**

- Increasing fares would increase fares for all transit users and potentially reduce transit use by nearly 14 million trips (approximately 2.7%).
- This approach would not change the fare options offered by Bay Area transit agencies and would neither improve fare coordination and simplification nor make fares more consistent across the agencies that provide transit services.
- The financial viability of any low income program depends on the ability to cover the fare revenue losses that the transit operators will experience. This revenue scenario has the potential to recapture most of the revenues lost by implementing a low income program.

## Means Testing

Despite efforts earlier in the study to identify scenarios that do not rely on means-testing, all three Affordability Scenarios analyzed include formalized means testing. The study accepts that means testing is a critical aspect of implementing and managing a low income program, even though it may limit the reach of the program and would not benefit those that do not meet the criteria. As noted in Next Steps, it may be preferable to reduce the complexities of means testing by on the qualifications of existing means-tested programs, such as CalFresh. However, relying on existing low-income program verification could limit the reach of a transit discount program.

Regardless of how means testing is conducted, an ID providing evidence of eligibility must be issued to serve as proof of low income qualification. A specially programmed low income Clipper® card could be created to serve this purpose, as well as a convenient way for riders to pay fares.

Means testing involves two steps:

- **Income Verification:** Establishing an income verification process will require agreement on forms of documentation that are acceptable for confirming income.
- **Eligibility Determination:** Eligibility determination involves reviewing income verification documentation, providing eligibility determinations, and distributing low income transit fare program identification cards.

The eligibility determination function could be managed in-house by one or more (or all) transit agencies and/or MTC, or outsourced to social service agencies or to a contractor similar to the Bay Area's RTC program contractor. Outsourcing would require MTC or a designated lead transit agency partner to manage the contract(s).

The following table provides rough order of magnitude estimates for program startup costs and ongoing operations costs required to develop and manage a regional means testing function, based on the study's analysis:

	In-House Low	In-House High	Outsourced Low	Outsourced High
<b>1-Time Startup Costs</b>	<b>\$600,000</b>	<b>\$1,000,000</b>	<b>\$550,000</b>	<b>\$800,000</b>
<b>Total Annual Operations</b>	<b>\$1,350,000</b>	<b>\$1,650,000</b>	<b>\$1,020,000</b>	<b>\$1,520,000</b>
<b>1st Year Startup + Ops</b>	<b>\$1,950,000</b>	<b>\$2,650,000</b>	<b>\$1,570,000</b>	<b>\$2,320,000</b>

Because the scenarios are only minimally defined, a range of implementation variables are likely to affect both the program cost and the cost of means testing. The future products offered, the number of riders targeted, the promotional goals of the program, and the number of staff dedicated to the program will determine the full range of eventual costs.

## Alternatives Evaluation and Recommended Actions

Throughout the study, MTC staff provided policy direction and guidance for a low income fare program. The TAC also served as a resource, providing feedback on the structures and assumptions behind the Affordability and Revenue Generating scenarios and the resulting ridership and fare revenue

projections. The TAC met on August 4, 2016, to review the ridership and fare revenue analysis and also provided the following broad-based input on policy direction for a Bay Area means-based fare pricing program:

- Affordability was further defined as helping all qualifying riders similarly every month up to the budgetary limits of the program. It does not necessarily favor certain subgroups of low income riders over others. While improving affordability is considered to be the primary policy objective, it can be relative:
  - A 50% discount is comparable to FTA's mandated discounts for seniors and persons with disabilities, and is an appropriate level of discount to provide a meaningful benefit to users.
  - Any discount would be viewed as helpful, as long as program qualification, enrollment, and participation is simple, straightforward, and streamlined for agencies and users alike.
- Feasibility was further defined to include nearer-term implementation that does not rely on the next generation of Clipper technology, which may still be years away from full implementation.
- Accessibility also refers to "easy to participate," meaning users don't need to come up with a lot of money up-front to enroll or buy a high-priced product.
- Centralized administration is essential for multi-county transit operators like BART and AC Transit; the RTC model was noted as a good example of centralized administration.
- Accessibility to Clipper® is neither a key concern nor a major potential barrier with using Clipper® to distribute subsidies; having a cash-paying option is not essential to a low income program.
- Limiting participation to a specific geographic area of the region was seen by some members of the TAC as potentially troublesome, unless the geographic limitation is part of a phased implementation or a pilot program.

With the analysis complete and TAC and MTC feedback received, CH2M conducted a weighting and prioritization analysis to determine the final set of preferred scenarios, using the following criteria:

1. **Rider Affordability:** This goal is weighted as a top priority for the program. This goal is defined by financial affordability and ease of access through objectives such as easy enrollment and participation, provision of the same discount to all eligible individuals, and means testing based on eligibility for another social program such as CalFresh.
2. **Administrative Feasibility & Financial Viability:** Along with Rider Affordability, this goal is weighted as a top priority. This goal is defined by objectives such as scalability to available funding, central and electronic management, implementability under the current Clipper system, and Clipper-only payment to minimize agency overhead.
3. **Consistent Regional Standard:** This goal is weighted as a secondary priority. This goal is defined by objectives that emphasize consistent eligibility requirements and the use of Clipper, but do not depend upon implementation of new region-wide fare policy or products. This reflects a recognition that a implementing regional fare policy could become a barrier to timely implementation of a low-income program.



**Affordability Scenarios: Recommendations**

Based on the weighting of these goals and objectives listed above, two preferred Affordability fare scenarios emerged as the preferred choices: A1, Discounted Fares and Passes for Low Income Riders and A3, Cash on Clipper. (*Technical Memorandum #4: Alternatives Evaluation and Recommended Actions* is dedicated to the detailed evaluation of scenarios against the study goals and objectives.)

**Revenue Generating Scenarios: Recommendations**

Revenue generating scenarios may be considered at the agency level if agencies are to help fund and implement a low income program. We recommend that MTC provide regional policy support to agencies for fare increases (R2) as a partial long-term program funding strategy, while also recognizing that the timing of, and revenue from, individual agency fare increases may be inconsistent from agency to agency. Consequently, additional non-agency funding and implementation resources may need to be identified. Transit agencies participating in the TAC expressed concern that no sustained funding source has been identified, and that in any event fund sources beyond fare revenues should be considered as part of a comprehensive funding strategy.

**Next Steps**

If MTC chooses to advance the concept of a regional means-based transit pricing program for the Bay Area, there are many policy and technical decisions that need to be made. A next step will be to share the study's findings and recommendations with all Bay Area transit agencies and set initial direction through a plan to pilot one or both of the top-ranked alternatives. Further program definition required for a pilot would also set the stage for development of a more precise cost estimate. This cost estimate should be a collaborative effort, built up with each transit agency applying individualized cost approaches based on each agency's unique ridership and available data.

**Technical Implementation Timeline**

Based on CH2M's experience with similar projects in the Bay Area, program definition activities could take two to four months. Contracting activities could take four to six months. Start-up of non-technical services (such as means-testing) could take four to eight months (depending on staffing). And technical systems implementation could take four to eight months (but could be conducted concurrently with start-up activities). Overall, technical implementation could take 10 to 18 months. However, this estimate could vary significantly depending on how Clipper system integration is managed and whether the current Clipper vendor is required to make changes to the current Clipper system.

**Pilot Program**

A limited pilot program could be a near-term alternative to full-scale implementation. A useful pilot program would test rider demand, uptake rate, behavior change, and establish likely costs of a full-scale implementation (due to lost revenues and implementation and ongoing costs), and identify any problems with the proposed implementation.

Two pilot program options have been put forward as a result of the study's analysis.

- Pilot Option #1 is to temporarily issue RTC Discount Clipper Cards to individuals who have already qualified for one or more means-tested programs, such as CalFresh. This program would be most similar to A1, Discounted Fares and Passes. The pilot program could be created quickly by issuing the policy directive to allow CalFresh cardholders to qualify for an RTC discount card. The pilot would track the uptake and usage of such cards for the duration of the pilot, after

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which time the pilot cards would be deactivated. RTC card issuance centers would need to be prepared for a surge in applications, but no other technical preparation would be required. Program enrollment could be restricted or expanded depending on the number of means-based programs (in addition to CalFresh) accepted as verification of low income status under the pilot program.

- Pilot Option #2 would test scenario A3, Cash on Clipper, using a well-defined sub-target population. For example, local clients of existing social service programs could be offered the benefits of the pilot program. Those willing to participate could be given pilot Clipper® accounts. Using current Clipper® functionality, monthly cash subsidies could be added electronically to those pilot accounts.

Each of these pilot options (explored in more detail in Technical Memorandum #4) provide a contained and straightforward way to test and document demand, uptake rate, and behavior change. This is the key information needed to define a means-testing process that reaches the target population, and to establish a solid multi-year budget that meets the needs of both low income riders and transit agencies.

## Appendix A: Technical Notes

The following two appendices of detailed analysis results are reprinted in their entirety from Technical Memorandum #3, Evaluation of Alternatives. They have retained their original titles of Appendix B and C to avoid confusion.

## Appendix B: Quantitative Analysis Results

### Current Ridership and Fare Revenue

	Current Ridership			Current Fare Revenue		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	35,225,000	20,270,000	55,495,000	\$36,126,800	\$22,473,200	\$58,600,000
ACE (Altamont Commuter Express)	130,000	946,000	1,076,000	\$831,700	\$6,053,300	\$6,885,000
BART	36,226,900	95,507,200	131,734,000	\$103,510,600	\$311,480,400	\$414,991,000
Caltrain	1,873,200	15,155,800	17,029,000	\$7,452,300	\$67,388,700	\$74,841,000
County Connection (CCCTA)	1,645,900	1,713,100	3,359,000	\$2,238,300	\$2,329,700	\$4,568,000
City of Dixon	34,600	17,400	52,000	\$61,900	\$31,100	\$93,000
ECCTA (Tridelta)	1,275,800	1,559,300	2,835,000	\$1,307,700	\$1,598,300	\$2,906,000
FAST (Fairfield and Suisun Transit)	778,700	298,300	1,077,000	\$1,517,600	\$581,400	\$2,099,000
Golden Gate (GGBHTD)	1,290,100	5,359,500	6,649,600	\$4,299,500	\$19,789,800	\$24,089,300
LAVTA (Wheels)	925,100	726,900	1,652,000	\$1,089,800	\$856,200	\$1,946,000
Marin Transit	563,500	2,340,900	2,904,400	\$1,877,900	\$8,643,800	\$10,521,700
Vine (NCTPA)	419,200	371,800	791,000	\$519,400	\$460,600	\$980,000
Petaluma Transit	237,600	122,400	360,000	\$143,900	\$74,100	\$218,000
Rio Vista Delta Breeze	6,900	5,100	12,000	\$11,500	\$8,600	\$20,000
SamTrans	7,304,500	5,479,500	12,784,000	\$9,684,200	\$7,471,800	\$17,156,000
Santa Rosa CityBus	1,817,400	512,600	2,330,000	\$1,741,000	\$491,000	\$2,232,000
VTA	28,228,900	15,200,200	43,429,000	\$24,512,000	\$13,148,000	\$37,660,000
San Francisco MTA	107,708,500	121,458,500	229,167,000	\$94,418,100	\$116,668,900	\$211,087,000
SoITrans (Solano County Transit)	999,500	434,500	1,434,000	\$2,340,500	\$1,017,500	\$3,358,000
Sonoma County	934,400	381,600	1,316,000	\$1,415,700	\$578,300	\$1,994,000
Union City	221,100	180,900	402,000	\$204,100	\$167,000	\$371,000
Vacaville City Coach	445,300	65,700	511,000	\$317,200	\$46,800	\$364,000
West CAT	415,800	940,300	1,356,000	\$565,400	\$1,278,600	\$1,844,000
San Francisco Bay Ferry (WETA)	79,200	1,901,800	1,981,000	\$524,700	\$12,593,300	\$13,118,000
<b>Total</b>	<b>228,787,100</b>	<b>290,949,300</b>	<b>519,736,000</b>	<b>\$296,711,800</b>	<b>\$595,230,400</b>	<b>\$891,942,200</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

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**Scenario A1 - 50% Discount for Low Income Cash, E-Purse, and Monthly Pass: Change in Ridership**

	Change in Ridership, #			Change in Ridership, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	4,569,000	0	4,569,000	13.0%	0.0%	8.2%
ACE (Altamont Commuter Express)	18,700	0	18,700	14.4%	0.0%	1.7%
BART	4,410,000	0	4,410,000	12.2%	0.0%	3.3%
Caltrain	197,100	0	197,100	10.5%	0.0%	1.2%
County Connection (CCCTA)	325,000	0	325,000	19.7%	0.0%	9.7%
City of Dixon	6,800	0	6,800	19.7%	0.0%	13.1%
ECCTA (Tridelta)	277,300	0	277,300	21.7%	0.0%	9.8%
FAST (Fairfield and Suisun Transit)	186,800	0	186,800	24.0%	0.0%	17.3%
Golden Gate (GGBHTD)	236,600	0	236,600	18.3%	0.0%	3.6%
LAVTA (Wheels)	202,300	0	202,300	21.9%	0.0%	12.2%
Marin Transit	103,300	0	103,300	18.3%	0.0%	3.6%
Vine (NCTPA)	97,200	0	97,200	23.2%	0.0%	12.3%
Petaluma Transit	47,700	0	47,700	20.1%	0.0%	13.3%
Rio Vista Delta Breeze	1,300	0	1,300	18.8%	0.0%	10.8%
SamTrans	1,289,300	0	1,289,300	17.7%	0.0%	10.1%
Santa Rosa CityBus	371,900	0	371,900	20.5%	0.0%	16.0%
VTA	5,170,700	0	5,170,700	18.3%	0.0%	11.9%
San Francisco MTA	6,467,500	0	6,467,500	6.0%	0.0%	2.8%
SolTrans (Solano County Transit)	215,200	0	215,200	21.5%	0.0%	15.0%
Sonoma County	191,200	0	191,200	20.5%	0.0%	14.5%
Union City	50,200	0	50,200	22.7%	0.0%	12.5%
Vacaville City Coach	103,000	0	103,000	23.1%	0.0%	20.2%
West CAT	101,800	0	101,800	24.5%	0.0%	7.5%
San Francisco Bay Ferry (WETA)	17,900	0	17,900	22.6%	0.0%	0.9%
<b>Total</b>	<b>24,657,800</b>	<b>0</b>	<b>24,657,800</b>	<b>10.8%</b>	<b>0.0%</b>	<b>4.7%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

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### Scenario A1 - 50% Discount for Low Income Cash, E-Purse, and Monthly Pass: Change in Fare Revenue

	Change in Fare Revenue, \$			Change in Fare Revenue, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	-\$9,229,300	\$0	-\$9,229,300	-25.5%	0.0%	-15.7%
ACE (Altamont Commuter Express)	-\$309,600	\$0	-\$309,600	-37.2%	0.0%	-4.5%
BART	-\$38,023,800	\$0	-\$38,023,800	-36.7%	0.0%	-9.2%
Caltrain	-\$2,374,600	\$0	-\$2,374,600	-31.9%	0.0%	-3.2%
County Connection (CCCTA)	-\$705,200	\$0	-\$705,200	-31.5%	0.0%	-15.4%
City of Dixon	-\$19,500	\$0	-\$19,500	-31.5%	0.0%	-21.0%
ECCTA (Tridelta)	-\$444,900	\$0	-\$444,900	-34.0%	0.0%	-15.3%
FAST (Fairfield and Suisun Transit)	-\$558,000	\$0	-\$558,000	-36.8%	0.0%	-26.6%
Golden Gate (GGBHTD)	-\$1,381,300	\$0	-\$1,381,300	-32.1%	0.0%	-5.7%
LAVTA (Wheels)	-\$372,600	\$0	-\$372,600	-34.2%	0.0%	-19.1%
Marin Transit	-\$603,300	\$0	-\$603,300	-32.1%	0.0%	-5.7%
Vine (NCTPA)	-\$186,000	\$0	-\$186,000	-35.8%	0.0%	-19.0%
Petaluma Transit	-\$45,900	\$0	-\$45,900	-31.9%	0.0%	-21.1%
Rio Vista Delta Breeze	-\$3,500	\$0	-\$3,500	-30.4%	0.0%	-17.5%
SamTrans	-\$2,979,600	\$0	-\$2,979,600	-30.8%	0.0%	-17.4%
Santa Rosa CityBus	-\$564,500	\$0	-\$564,500	-32.4%	0.0%	-25.3%
VTA	-\$7,521,100	\$0	-\$7,521,100	-30.7%	0.0%	-20.0%
San Francisco MTA	-\$12,603,000	\$0	-\$12,603,000	-13.3%	0.0%	-6.0%
SolTrans (Solano County Transit)	-\$790,300	\$0	-\$790,300	-33.8%	0.0%	-23.5%
Sonoma County	-\$459,000	\$0	-\$459,000	-32.4%	0.0%	-23.0%
Union City	-\$71,900	\$0	-\$71,900	-35.2%	0.0%	-19.4%
Vacaville City Coach	-\$113,300	\$0	-\$113,300	-35.7%	0.0%	-31.1%
West CAT	-\$211,300	\$0	-\$211,300	-37.4%	0.0%	-11.5%
San Francisco Bay Ferry (WETA)	-\$183,900	\$0	-\$183,900	-35.0%	0.0%	-1.4%
<b>Total</b>	<b>-\$79,755,600</b>	<b>\$0</b>	<b>-\$79,755,600</b>	<b>-26.9%</b>	<b>0.0%</b>	<b>-8.9%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

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**Scenario A2 - Low Income Monthly Accumulator, Cap at 50% of Monthly Pass: Change in Ridership**

	Change in Ridership, #			Change in Ridership, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	4,822,500	0	4,822,500	13.7%	0.0%	8.7%
ACE (Altamont Commuter Express)	9,700	0	9,700	7.5%	0.0%	0.9%
BART	3,432,300	0	3,432,300	9.5%	0.0%	2.6%
Caltrain	183,000	0	183,000	9.8%	0.0%	1.1%
County Connection (CCCTA)	196,800	0	196,800	12.0%	0.0%	5.9%
City of Dixon	3,800	0	3,800	11.0%	0.0%	7.3%
ECCTA (Tridelta)	155,000	0	155,000	12.1%	0.0%	5.5%
FAST (Fairfield and Suisun Transit)	103,700	0	103,700	13.3%	0.0%	9.6%
Golden Gate (GGBHTD)	202,300	0	202,300	15.7%	0.0%	3.0%
LAVTA (Wheels)	121,400	0	121,400	13.1%	0.0%	7.3%
Marin Transit	88,400	0	88,400	15.7%	0.0%	3.0%
Vine (NCTPA)	53,800	0	53,800	12.8%	0.0%	6.8%
Petaluma Transit	25,900	0	25,900	10.9%	0.0%	7.2%
Rio Vista Delta Breeze	700	0	700	10.1%	0.0%	5.8%
SamTrans	991,100	0	991,100	13.6%	0.0%	7.8%
Santa Rosa CityBus	197,900	0	197,900	10.9%	0.0%	8.5%
VTA	3,651,200	0	3,651,200	12.9%	0.0%	8.4%
San Francisco MTA	8,685,300	0	8,685,300	8.1%	0.0%	3.8%
SoftTrans (Solano County Transit)	132,600	0	132,600	13.3%	0.0%	9.2%
Sonoma County	101,800	0	101,800	10.9%	0.0%	7.7%
Union City	24,100	0	24,100	10.9%	0.0%	6.0%
Vacaville City Coach	60,400	0	60,400	13.6%	0.0%	11.8%
West CAT	65,200	0	65,200	15.7%	0.0%	4.8%
San Francisco Bay Ferry (WETA)	11,600	0	11,600	14.6%	0.0%	0.6%
<b>Total</b>	<b>23,320,400</b>	<b>0</b>	<b>23,320,400</b>	<b>10.2%</b>	<b>0.0%</b>	<b>4.5%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

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**Scenario A2 - Low Income Monthly Accumulator, Cap at 50% of Monthly Pass: Change in Fare Revenue**

	Change in Fare Revenue, \$			Change in Fare Revenue, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	-\$8,409,700	\$0	-\$8,409,700	-23.3%	0.0%	-14.4%
ACE (Altamont Commuter Express)	-\$179,800	\$0	-\$179,800	-21.6%	0.0%	-2.6%
BART	-\$27,436,700	\$0	-\$27,436,700	-26.5%	0.0%	-6.6%
Caltrain	-\$2,027,000	\$0	-\$2,027,000	-27.2%	0.0%	-2.7%
County Connection (CCCTA)	-\$464,100	\$0	-\$464,100	-20.7%	0.0%	-10.2%
City of Dixon	-\$11,800	\$0	-\$11,800	-19.1%	0.0%	-12.7%
ECCTA (Tridelata)	-\$274,800	\$0	-\$274,800	-21.0%	0.0%	-9.5%
FAST (Fairfield and Suisun Transit)	-\$345,100	\$0	-\$345,100	-22.7%	0.0%	-16.4%
Golden Gate (GGBHTD)	-\$1,121,800	\$0	-\$1,121,800	-26.1%	0.0%	-4.7%
LAVTA (Wheels)	-\$244,700	\$0	-\$244,700	-22.5%	0.0%	-12.6%
Marin Transit	-\$490,000	\$0	-\$490,000	-26.1%	0.0%	-4.7%
Vine (NCTPA)	-\$114,500	\$0	-\$114,500	-22.0%	0.0%	-11.7%
Petaluma Transit	-\$27,500	\$0	-\$27,500	-19.1%	0.0%	-12.6%
Rio Vista Delta Breeze	-\$2,200	\$0	-\$2,200	-19.1%	0.0%	-11.0%
SamTrans	-\$2,237,000	\$0	-\$2,237,000	-23.1%	0.0%	-13.0%
Santa Rosa CityBus	-\$332,800	\$0	-\$332,800	-19.1%	0.0%	-14.9%
VTA	-\$5,443,700	\$0	-\$5,443,700	-22.2%	0.0%	-14.5%
San Francisco MTA	-\$13,834,700	\$0	-\$13,834,700	-14.7%	0.0%	-6.6%
SolTrans (Solano County Transit)	-\$530,400	\$0	-\$530,400	-22.7%	0.0%	-15.8%
Sonoma County	-\$270,700	\$0	-\$270,700	-19.1%	0.0%	-13.6%
Union City	-\$39,000	\$0	-\$39,000	-19.1%	0.0%	-10.5%
Vacaville City Coach	-\$73,200	\$0	-\$73,200	-23.1%	0.0%	-20.1%
West CAT	-\$147,500	\$0	-\$147,500	-26.1%	0.0%	-8.0%
San Francisco Bay Ferry (WETA)	-\$128,800	\$0	-\$128,800	-24.5%	0.0%	-1.0%
<b>Total</b>	<b>-\$64,187,700</b>	<b>\$0</b>	<b>-\$64,187,700</b>	<b>-21.6%</b>	<b>0.0%</b>	<b>-7.2%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.



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**Scenario A3 - Low Income Clipper E-Purse with Bonus Value, at 1 to 1 Match: Change in Ridership**

	Change in Ridership, #			Change in Ridership, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	5,849,500	0	5,849,500	16.6%	0.0%	10.5%
ACE (Altamont Commuter Express)	13,300	0	13,300	10.2%	0.0%	1.2%
BART	4,794,200	0	4,794,200	13.2%	0.0%	3.6%
Caltrain	209,300	0	209,300	11.2%	0.0%	1.2%
County Connection (CCCTA)	259,500	0	259,500	15.8%	0.0%	7.7%
City of Dixon	5,200	0	5,200	15.0%	0.0%	10.0%
ECCTA (Tridelta)	205,800	0	205,800	16.1%	0.0%	7.3%
FAST (Fairfield and Suisun Transit)	125,900	0	125,900	16.2%	0.0%	11.7%
Golden Gate (GGBHTD)	262,200	0	262,200	20.3%	0.0%	3.9%
LAVTA (Wheels)	146,200	0	146,200	15.8%	0.0%	8.8%
Marin Transit	114,500	0	114,500	20.3%	0.0%	3.9%
Vine (NCTPA)	67,800	0	67,800	16.2%	0.0%	8.6%
Petaluma Transit	35,800	0	35,800	15.1%	0.0%	9.9%
Rio Vista Delta Breeze	1,000	0	1,000	14.5%	0.0%	8.3%
SamTrans	1,161,900	0	1,161,900	15.9%	0.0%	9.1%
Santa Rosa CityBus	273,500	0	273,500	15.0%	0.0%	11.7%
VTA	4,507,600	0	4,507,600	16.0%	0.0%	10.4%
San Francisco MTA	7,554,100	0	7,554,100	7.0%	0.0%	3.3%
SolTrans (Solano County Transit)	161,700	0	161,700	16.2%	0.0%	11.3%
Sonoma County	140,600	0	140,600	15.0%	0.0%	10.7%
Union City	33,300	0	33,300	15.1%	0.0%	8.3%
Vacaville City Coach	70,800	0	70,800	15.9%	0.0%	13.9%
West CAT	84,500	0	84,500	20.3%	0.0%	6.2%
San Francisco Bay Ferry (WETA)	14,400	0	14,400	18.2%	0.0%	0.7%
<b>Total</b>	<b>26,092,900</b>	<b>0</b>	<b>26,092,900</b>	<b>11.4%</b>	<b>0.0%</b>	<b>5.0%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

Regional Means-Based Transit Fare Pricing Study:  
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**Scenario A3 - Low Income Clipper E-Purse with Bonus Value, at 1 to 1 Match: Change in Fare Revenue**

	Change in Fare Revenue, \$			Change in Fare Revenue, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	-\$9,884,100	\$0	-\$9,884,100	-27.4%	0.0%	-16.9%
ACE (Altamont Commuter Express)	-\$235,600	\$0	-\$235,600	-28.3%	0.0%	-3.4%
BART	-\$36,115,200	\$0	-\$36,115,200	-34.9%	0.0%	-8.7%
Caltrain	-\$2,266,000	\$0	-\$2,266,000	-30.4%	0.0%	-3.0%
County Connection (CCCTA)	-\$586,600	\$0	-\$586,600	-26.2%	0.0%	-12.8%
City of Dixon	-\$15,600	\$0	-\$15,600	-25.2%	0.0%	-16.8%
ECCTA (Tridelta)	-\$349,200	\$0	-\$349,200	-26.7%	0.0%	-12.0%
FAST (Fairfield and Suisun Transit)	-\$406,000	\$0	-\$406,000	-26.8%	0.0%	-19.3%
Golden Gate (GGBHTD)	-\$1,386,800	\$0	-\$1,386,800	-32.3%	0.0%	-5.8%
LAVTA (Wheels)	-\$286,200	\$0	-\$286,200	-26.3%	0.0%	-14.7%
Marin Transit	-\$605,700	\$0	-\$605,700	-32.3%	0.0%	-5.8%
Vine (NCTPA)	-\$139,100	\$0	-\$139,100	-26.8%	0.0%	-14.2%
Petaluma Transit	-\$36,300	\$0	-\$36,300	-25.2%	0.0%	-16.7%
Rio Vista Delta Breeze	-\$2,900	\$0	-\$2,900	-25.2%	0.0%	-14.5%
SamTrans	-\$2,556,700	\$0	-\$2,556,700	-26.4%	0.0%	-14.9%
Santa Rosa CityBus	-\$438,900	\$0	-\$438,900	-25.2%	0.0%	-19.7%
VTA	-\$6,500,400	\$0	-\$6,500,400	-26.5%	0.0%	-17.3%
San Francisco MTA	-\$12,194,400	\$0	-\$12,194,400	-12.9%	0.0%	-5.8%
SolTrans (Solano County Transit)	-\$626,600	\$0	-\$626,600	-26.8%	0.0%	-18.7%
Sonoma County	-\$357,000	\$0	-\$357,000	-25.2%	0.0%	-17.9%
Union City	-\$51,400	\$0	-\$51,400	-25.2%	0.0%	-13.9%
Vacaville City Coach	-\$83,700	\$0	-\$83,700	-26.4%	0.0%	-23.0%
West CAT	-\$182,400	\$0	-\$182,400	-32.3%	0.0%	-9.9%
San Francisco Bay Ferry (WETA)	-\$155,000	\$0	-\$155,000	-29.5%	0.0%	-1.2%
<b>Total</b>	<b>-\$75,462,000</b>	<b>\$0</b>	<b>-\$75,462,000</b>	<b>-25.4%</b>	<b>0.0%</b>	<b>-8.5%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

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**Scenario R1 - Eliminate Non-Mandated Discounts (Retain Only 50% Senior/Disabled Discount on Cash Fares During Off-Peak Periods): Change in Ridership**

	Change in Ridership, #			Change in Ridership, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	-2,502,200	-972,700	-3,474,900	-7.1%	-4.8%	-6.3%
ACE (Altamont Commuter Express)	-1,700	-11,000	-12,800	-1.3%	-1.2%	-1.2%
BART	-1,529,400	-1,037,400	-2,566,800	-4.2%	-1.1%	-1.9%
Caltrain	-62,600	-129,500	-192,200	-3.3%	-0.9%	-1.1%
County Connection (CCCTA)	-43,200	-40,900	-84,100	-2.6%	-2.4%	-2.5%
City of Dixon	-900	-400	-1,300	-2.6%	-2.3%	-2.5%
ECCTA (Tridelta)	-34,600	-38,500	-73,100	-2.7%	-2.5%	-2.6%
FAST (Fairfield and Suisun Transit)	-33,200	-11,600	-44,800	-4.3%	-3.9%	-4.2%
Golden Gate (GGBHTD)	-52,500	-57,900	-110,300	-4.1%	-1.1%	-1.7%
LAVTA (Wheels)	-39,200	-28,100	-67,300	-4.2%	-3.9%	-4.1%
Marin Transit	-22,900	-25,300	-48,200	-4.1%	-1.1%	-1.7%
Vine (NCTPA)	-31,100	-25,100	-56,200	-7.4%	-6.8%	-7.1%
Petaluma Transit	-13,900	-6,500	-20,400	-5.9%	-5.3%	-5.7%
Rio Vista Delta Breeze	-800	-500	-1,300	-11.6%	-9.8%	-10.8%
SamTrans	-261,200	-148,800	-410,000	-3.6%	-2.7%	-3.2%
Santa Rosa CityBus	-84,500	-21,700	-106,300	-4.6%	-4.2%	-4.6%
VTA	-567,400	-261,400	-828,800	-2.0%	-1.7%	-1.9%
San Francisco MTA	-7,563,800	-4,611,400	-12,175,200	-7.0%	-3.8%	-5.3%
SoITrans (Solano County Transit)	-63,300	-25,100	-88,400	-6.3%	-5.8%	-6.2%
Sonoma County	-52,100	-19,400	-71,500	-5.6%	-5.1%	-5.4%
Union City	-11,500	-8,500	-20,000	-5.2%	-4.7%	-5.0%
Vacaville City Coach	-18,000	-2,400	-20,400	-4.0%	-3.7%	-4.0%
West CAT	-7,300	-15,000	-22,300	-1.8%	-1.6%	-1.6%
San Francisco Bay Ferry (WETA)	-1,400	-29,500	-30,900	-1.8%	-1.6%	-1.6%
<b>Total</b>	<b>-12,998,600</b>	<b>-7,528,900</b>	<b>-20,527,500</b>	<b>-5.7%</b>	<b>-2.6%</b>	<b>-3.9%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

Regional Means-Based Transit Fare Pricing Study:  
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**Scenario R1 - Eliminate Non-Mandated Discounts (Retain Only 50% Senior/Disabled Discount on Cash Fares During Off-Peak Periods): Change in Fare Revenue**

	Change In Fare Revenue, \$			Change In Fare Revenue, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	\$4,662,200	\$2,132,500	\$6,794,700	12.9%	9.5%	11.6%
ACE (Altamont Commuter Express)	\$38,500	\$291,000	\$329,500	4.6%	4.8%	4.8%
BART	\$10,615,400	\$8,442,100	\$19,057,500	10.3%	2.7%	4.6%
Caltrain	\$638,300	\$1,553,600	\$2,191,900	8.6%	2.3%	2.9%
County Connection (CCCTA)	\$124,300	\$135,300	\$259,600	5.6%	5.8%	5.7%
City of Dixon	\$3,500	\$1,800	\$5,300	5.7%	5.8%	5.7%
ECCTA (Tridelta)	\$75,100	\$96,100	\$171,200	5.7%	6.0%	5.9%
FAST (Fairfield and Suisun Transit)	\$140,600	\$56,400	\$196,900	9.3%	9.7%	9.4%
Golden Gate (GGBHTD)	\$275,600	\$343,700	\$619,200	6.4%	1.7%	2.6%
LAVTA (Wheels)	\$100,500	\$82,600	\$183,100	9.2%	9.6%	9.4%
Marin Transit	\$120,400	\$150,100	\$270,500	6.4%	1.7%	2.6%
Vine (NCTPA)	\$88,500	\$82,300	\$170,800	17.0%	17.9%	17.4%
Petaluma Transit	\$18,800	\$10,100	\$28,900	13.1%	13.6%	13.3%
Rio Vista Delta Breeze	\$3,200	\$2,500	\$5,700	27.8%	29.1%	28.5%
SamTrans	\$552,500	\$377,300	\$929,700	5.7%	5.0%	5.4%
Santa Rosa CityBus	\$177,200	\$52,300	\$229,500	10.2%	10.7%	10.3%
VTA	\$747,200	\$388,700	\$1,135,900	3.0%	3.0%	3.0%
San Francisco MTA	\$11,401,600	\$7,888,600	\$19,290,300	12.1%	6.8%	9.1%
SoTrans (Solano County Transit)	\$334,100	\$152,200	\$486,300	14.3%	15.0%	14.5%
Sonoma County	\$175,600	\$75,100	\$250,700	12.4%	13.0%	12.6%
Union City	\$23,300	\$20,000	\$43,300	11.4%	12.0%	11.7%
Vacaville City Coach	\$27,700	\$4,300	\$32,000	8.7%	9.2%	8.8%
West CAT	\$20,700	\$49,000	\$69,700	3.7%	3.8%	3.8%
San Francisco Bay Ferry (WETA)	\$18,700	\$468,000	\$486,800	3.6%	3.7%	3.7%
<b>Total</b>	<b>\$30,383,300</b>	<b>\$22,855,500</b>	<b>\$53,238,800</b>	<b>10.2%</b>	<b>3.8%</b>	<b>6.0%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

Regional Means-Based Transit Fare Pricing Study:  
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### Scenario R2 - 10% Across-the-Board Fare Increase: Change in Ridership

	Change in Ridership, #			Change in Ridership, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	-1,090,100	-571,100	-1,661,100	-3.1%	-2.8%	-3.0%
ACE (Altamont Commuter Express)	-2,800	-17,900	-20,700	-2.2%	-1.9%	-1.9%
BART	-785,000	-1,802,100	-2,587,100	-2.2%	-1.9%	-2.0%
Caltrain	-40,600	-286,000	-326,500	-2.2%	-1.9%	-1.9%
County Connection (CCCTA)	-50,900	-48,200	-99,200	-3.1%	-2.8%	-3.0%
City of Dixon	-1,100	-500	-1,600	-3.2%	-2.9%	-3.1%
ECCTA (Tridelta)	-39,500	-43,900	-83,400	-3.1%	-2.8%	-2.9%
FAST (Fairfield and Suisun Transit)	-24,100	-8,400	-32,500	-3.1%	-2.8%	-3.0%
Golden Gate (GGBHTD)	-39,900	-151,000	-190,900	-3.1%	-2.8%	-2.9%
LAVTA (Wheels)	-28,600	-20,500	-49,100	-3.1%	-2.8%	-3.0%
Marin Transit	-17,400	-65,900	-83,400	-3.1%	-2.8%	-2.9%
Vine (NCTPA)	-13,000	-10,500	-23,400	-3.1%	-2.8%	-3.0%
Petaluma Transit	-7,400	-3,400	-10,800	-3.1%	-2.8%	-3.0%
Rio Vista Delta Breeze	-200	-100	-400	-2.9%	-2.0%	-3.3%
SamTrans	-226,000	-154,400	-380,400	-3.1%	-2.8%	-3.0%
Santa Rosa CityBus	-56,200	-14,400	-70,700	-3.1%	-2.8%	-3.0%
VTA	-872,100	-428,100	-1,300,200	-3.1%	-2.8%	-3.0%
San Francisco MTA	-3,332,000	-3,420,600	-6,752,600	-3.1%	-2.8%	-2.9%
SolTrans (Solano County Transit)	-30,900	-12,200	-43,200	-3.1%	-2.8%	-3.0%
Sonoma County	-28,900	-10,700	-39,700	-3.1%	-2.8%	-3.0%
Union City	-6,800	-5,100	-11,900	-3.1%	-2.8%	-3.0%
Vacaville City Coach	-13,800	-1,900	-15,600	-3.1%	-2.9%	-3.1%
West CAT	-12,900	-26,500	-39,400	-3.1%	-2.8%	-2.9%
San Francisco Bay Ferry (WETA)	-2,500	-53,600	-56,000	-3.2%	-2.8%	-2.8%
<b>Total</b>	<b>-6,722,700</b>	<b>-7,156,900</b>	<b>-13,879,600</b>	<b>-2.9%</b>	<b>-2.5%</b>	<b>-2.7%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

Regional Means-Based Transit Fare Pricing Study:  
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### Scenario R2 - 10% Across-the-Board Fare Increase: Change in Fare Revenue

	Change in Fare Revenue, \$			Change in Fare Revenue, %		
	Low Income	Non-Low Income	Total	Low Income	Non-Low Income	Total
AC Transit	\$2,383,300	\$1,551,200	\$3,934,500	6.6%	6.9%	6.7%
ACE (Altamont Commuter Express)	\$63,400	\$479,700	\$543,100	7.6%	7.9%	7.9%
BART	\$8,035,000	\$25,156,200	\$33,191,200	7.8%	8.1%	8.0%
Caltrain	\$567,600	\$5,340,200	\$5,907,800	7.6%	7.9%	7.9%
County Connection (CCCTA)	\$147,600	\$160,800	\$308,400	6.6%	6.9%	6.8%
City of Dixon	\$4,100	\$2,100	\$6,200	6.6%	6.8%	6.7%
ECCTA (Tridelta)	\$86,200	\$110,300	\$196,500	6.6%	6.9%	6.8%
FAST (Fairfield and Suisun Transit)	\$100,100	\$40,100	\$140,200	6.6%	6.9%	6.7%
Golden Gate (GGBHTD)	\$282,800	\$1,361,800	\$1,644,600	6.6%	6.9%	6.8%
LAVTA (Wheels)	\$71,900	\$59,100	\$131,000	6.6%	6.9%	6.7%
Marin Transit	\$123,900	\$596,500	\$720,400	6.6%	6.9%	6.8%
Vine (NCTPA)	\$34,300	\$31,800	\$66,000	6.6%	6.9%	6.7%
Petaluma Transit	\$9,500	\$5,100	\$14,600	6.6%	6.9%	6.7%
Rio Vista Delta Breeze	\$800	\$600	\$1,300	7.0%	7.0%	6.5%
SamTrans	\$638,900	\$515,700	\$1,154,600	6.6%	6.9%	6.7%
Santa Rosa CityBus	\$114,800	\$33,900	\$148,700	6.6%	6.9%	6.7%
VTA	\$1,616,600	\$907,200	\$2,523,800	6.6%	6.9%	6.7%
San Francisco MTA	\$6,226,700	\$8,050,000	\$14,276,700	6.6%	6.9%	6.8%
SolTrans (Solano County Transit)	\$154,400	\$70,200	\$224,600	6.6%	6.9%	6.7%
Sonoma County	\$93,400	\$39,900	\$133,300	6.6%	6.9%	6.7%
Union City	\$13,500	\$11,500	\$25,000	6.6%	6.9%	6.7%
Vacaville City Coach	\$20,900	\$3,200	\$24,200	6.6%	6.8%	6.6%
West CAT	\$37,300	\$88,300	\$125,600	6.6%	6.9%	6.8%
San Francisco Bay Ferry (WETA)	\$34,600	\$869,100	\$903,700	6.6%	6.9%	6.9%
<b>Total</b>	<b>\$20,861,600</b>	<b>\$45,484,400</b>	<b>\$66,346,000</b>	<b>7.0%</b>	<b>7.6%</b>	<b>7.4%</b>

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

**Appendix C: Impacts on Farebox Recovery**

	Farebox Recovery					
	Current	A1	A2	A3	R1	R2
AC Transit	18.8%	15.9%	16.1%	15.7%	21.0%	20.1%
ACE (Altamont Commuter Express)	45.2%	43.2%	44.0%	43.7%	47.4%	48.8%
BART	73.1%	66.4%	68.3%	66.7%	76.5%	79.0%
Caltrain	62.7%	60.7%	61.0%	60.8%	64.5%	67.6%
County Connection (CCCTA)	16.5%	14.0%	14.8%	14.4%	17.4%	17.6%
City of Dixon	15.6%	12.4%	13.6%	13.0%	16.5%	16.7%
ECCTA (Tridelta)	18.4%	15.6%	16.7%	16.2%	19.5%	19.7%
FAST (Fairfield and Suisun Transit)	24.8%	18.2%	20.7%	20.0%	27.2%	26.5%
Golden Gate (GGBHTD) / Marin Transit	23.1%	21.8%	22.1%	21.8%	23.7%	24.7%
LAVTA (Wheels)	13.8%	11.2%	12.1%	11.8%	15.1%	14.7%
Vine (NCTPA)	14.6%	11.8%	12.9%	12.5%	17.1%	15.6%
Petaluma Transit	16.4%	12.9%	14.3%	13.7%	18.6%	17.5%
Rio Vista Delta Breeze	5.6%	4.6%	4.9%	4.8%	7.1%	5.9%
SamTrans	16.8%	13.9%	14.6%	14.3%	17.7%	17.9%
Santa Rosa CityBus	21.5%	16.0%	18.3%	17.3%	23.7%	22.9%
VTA	11.8%	9.4%	10.1%	9.8%	12.2%	12.6%
San Francisco MTA	30.4%	28.5%	28.4%	28.6%	33.1%	32.4%
SolTrans (Solano County Transit)	34.6%	26.5%	29.2%	28.2%	39.6%	36.9%
Sonoma County	17.2%	13.3%	14.9%	14.2%	19.4%	18.4%
Union City	11.3%	9.1%	10.1%	9.8%	12.7%	12.1%
Vacaville City Coach	20.3%	14.0%	16.2%	15.6%	22.1%	21.7%
West CAT	23.8%	21.1%	21.9%	21.5%	24.7%	25.5%
San Francisco Bay Ferry (WETA)	50.7%	50.0%	50.2%	50.1%	52.6%	54.2%
<b>Total</b>	<b>37.5%</b>	<b>34.1%</b>	<b>34.8%</b>	<b>34.3%</b>	<b>39.7%</b>	<b>40.3%</b>

NOTE: Operating costs for Golden Gate and Marin Transit are currently available only as a combined total for both agencies, so it has not been possible to calculate separate farebox recovery ratios for those two agencies.

Source: CH2M analysis based on 2015 MTC Statistical Summary of Bay Area Operators, MTC Transit Passenger Demographic Surveys, and BART 2014 Customer Satisfaction Survey.

2019 On-Board Passenger Survey (English version)



(for office use only) Route Code:  Time:  Interviewer:  Direction:

Please take a few moments to help plan for your transit needs by filling out this survey.

All personal information will be kept strictly confidential and WILL NOT be shared or sold.

What is your **HOME ADDRESS**: (please be specific, ex: 123 W. Main St);  
(If you are visiting the Bay area, please list the address where you are staying)

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**COMING FROM?**

1. What type of place are you

**COMING FROM NOW?**

(the starting place for your one-way trip)

- Your usual **WORKPLACE**
- Work related
- Your **HOME** → Go to Question #4
- Hotel Residence (Visitor Only)
- Social or recreational
- Shopping
- School (K-12) (student only)
- College or University (student only)
- Airport (airline passenger only)
- Medical / dental
- Dining / coffee
- Escorting others pick up/dropoff
- Personal business
- Other: \_\_\_\_\_

2. What is the **NAME** of the place you are coming from now?

\_\_\_\_\_

3. What is the **EXACT ADDRESS** of this place? (OR Intersection if you do not know the exact address:)

\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

4. How did you **GET FROM** the place in Question #1 TO THE VERY **FIRST** bus or train you used for this one-way trip?

- Walked all the way; how far did you walk? \_\_\_\_\_ blocks
- BIKE →  BIKE SHARE  Personal Bike
- Was dropped off using Uber, Lyft, or similar service (answer 4a)
- Taxi (answer 4a)
- Was dropped off by someone – not a service (answer 4a)
- Drove alone and parked (answer 4a)
- Drove or rode with others and parked (answer 4a)

4a. Where did you get **ON** the first bus or train you used for this one-way trip (Write the nearest intersection / park-and-ride lot / rail station below):

\_\_\_\_\_

5. Where did you **get ON** this bus?  
Please provide the nearest intersection / stop or station name / park-and-ride lot:

\_\_\_\_\_

**GOING TO?**

6. What type of place are you

**GOING TO NOW?**

(the ending place for your one-way trip)

- Your usual **WORKPLACE**
- Work related
- Your **HOME** → Go to Question #9
- Hotel Residence (Visitor Only)
- Social or recreational
- Shopping
- School (K-12) (student only)
- College or University (student only)
- Airport (airline passenger only)
- Medical / dental
- Dining / coffee
- Escorting others pick up/dropoff
- Personal business
- Other: \_\_\_\_\_

7. What is the **NAME** of the place you are going to now?

\_\_\_\_\_

8. What is the **EXACT ADDRESS** of this place? (OR Intersection if you do not know the exact address:)

\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

9. How will you **GET TO** your destination (listed in Question #6) after you get off the **LAST** bus or train you will use for this one-way trip?

- Walk all the way; how far did you walk? \_\_\_\_\_ blocks
- BIKE →  BIKE SHARE  Personal Bike
- Dropped off using Uber, Lyft, or similar service (answer 9a)
- Taxi (answer 9a)
- Dropped off by someone – not a service (answer 9a)
- Drive alone (answer 9a)
- Drive or ride with others (answer 9a)

9a. Where will you get off the last bus or train you are using for this one-way trip (Write the nearest intersection / park-and-ride lot / rail station below):

\_\_\_\_\_

10. Where will you **get OFF** this bus?  
Please provide the nearest intersection / stop or station name / park-and-ride lot:

\_\_\_\_\_

11. **INCLUDING THIS BUS**, how many **TOTAL BUSES/TRAINS** will you use to make **THIS ONE-WAY TRIP**?

- One, only this bus  Two  Three  Four or more

11a. Please list the routes and/or rail stations in the exact order you use them for this one-way trip.

**START** →  →  →  →  →  → **END**

1st route #/rail station    2nd route/rail station    3rd route/rail station    4th route/rail station    5th route/rail station



**OTHER INFORMATION ABOUT THIS TRIP(S)**

12. What time did you BOARD this bus? \_\_\_\_\_ : \_\_\_\_\_ am / pm (circle one)
13. Will you (or did you) make this same trip on exactly the same routes in the opposite direction today?  
 No  Yes - At what time did you leave for this trip in the opposite direction? \_\_\_\_\_ : \_\_\_\_\_ am/pm (circle one)
14. What fare category did you pay?  
 Adult  Senior  Disabled  Other: \_\_\_\_\_
15. How did you pay for this one-way trip?  
**BY CLIPPER** **BY CASH OR PAPER** **BY Mobile Ticket App**  
 Day Pass  Cash (coins and bills)  20 Ride Pass  Mobile Ticket App  
 Transfer from different Agency  Transfer from different Agency  31 Day Pass  Mobile Ticket App  
 Stored Value  Other: \_\_\_\_\_  Day Pass  
 31 Day Pass  East Bay Regional 31 Day Pass

16. How do you currently get information and updates about your bus (schedules, arrival times, etc)? select all that apply  
 Printed schedule  Mobile Ticketing app  Social Media (ie Facebook, Instagram, Twitter, etc)  
 Tri Delta website  Tri Delta mobile app  511.org  Other: \_\_\_\_\_
17. How would you prefer to get news, updates, schedule information about your bus? select top three choices  
 Printed schedule  Mobile Ticketing app  Social Media (ie Facebook, Instagram, Twitter, etc)  
 Tri Delta website  Tri Delta mobile app  511.org  Other: \_\_\_\_\_
18. How many working vehicles (auto or motorcycles) are available to your household? \_\_\_\_\_ vehicles
19. Including YOU, how many people live in your household? \_\_\_\_\_ people
20. Including YOU, how many adults (age 16 and older) that are employed full or part time live in your household? \_\_\_\_\_ people
21. Are you a student? (check the one response that BEST describes you)  
 Not a student  Yes - Full Time college/university  Yes - K - 12<sup>th</sup> grade  
 Yes - Part Time college/university  Yes - vocational/technical/trade school  Yes - other
- 21a. [if #21 is Yes] Please specify your college/university/school name and address: \_\_\_\_\_
22. What year were you born? \_\_\_\_\_
23. Are you? (check all that apply)  
 Latino/Hispanic  Black/African American  Asian  
 American Indian / Alaska Native  Native Hawaiian / Pacific Islander  White  Other: \_\_\_\_\_
24. What is your gender?  Male  Female  Other Gender: \_\_\_\_\_
25. Which of the following BEST describes your TOTAL ANNUAL HOUSEHOLD INCOME in 2018 before taxes?  
 Below \$10,000  \$50,000 - \$74,999  
 \$10,000-\$24,999  \$75,000 - \$99,999  
 \$25,000-\$34,999  \$100,000 - \$149,999  
 \$35,000-\$49,999  \$150,000 or more  Not provided
26. Do you speak a language other than English at home?  No  Yes - Which language?  
 IF YES: How well do you speak English?  Very Well  Well  Less than well  Not at all

**WIN A PRIZE!!!!**

People who submit an accurately completed survey will be entered in a random drawing for a chance to win a \$399 Visa gift card.

Name: \_\_\_\_\_  
 Phone Number: (\_\_\_\_) \_\_\_\_\_  
 E-mail address: \_\_\_\_\_

**THANKS FOR YOUR PARTICIPATION!**

## Virtual Public Hearing Webpage (English)



### Virtual Public Hearing: Income-based fare discount

[para información en español haga clic aquí](#)

Tri Delta Transit is seeking community input regarding a proposed income-based fare discount that would provide a 20% discount for low-income riders on Tri Delta Transit's fixed-route and Tri MyRide service. This pilot program is expected to begin January 2021 and will run for 12 months. During that time Tri Delta Transit will evaluate the program and determine if it offers a meaningful benefit to Tri Delta Transit passengers. After the trial period, this may become a permanent program, subject to approval by the Tri Delta Transit Board of Directors.

#### How to participate:

1. Watch this video. **Please turn on sound to hear the video.** (To receive a copy of this presentation call 925-384-2522 or email [comments@eccta.org](mailto:comments@eccta.org))



2. Submit a public comment or question here:

First Name	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Last Name	<input type="text"/>
Email	<input type="text"/>	Email	<input type="text"/>
Comment or Question	<input type="text"/>	Comment or Question	<input type="text"/>

Public comments must be received by November 15, 2020. There are many ways to submit a public comment or question:

1. **Call** - 925-384-2522
2. **Fax** - (925) 757-2530 Attn: Public Comment
3. **E-mail** - [comments@eccta.org](mailto:comments@eccta.org)
4. **Mail** or in-person:  
 Tri Delta Transit  
 801 Wilbur Ave.  
 Antioch, CA 94509  
 Attn: Public Comment

#### Frequently Asked Questions

## Virtual Public Hearing Webpage (Spanish)



### Audiencia Pública Virtual: Propuesta para establecer un descuento de tarifa basado en ingresos en Tri Delta Transit

For information in English click here

Tri Delta Transit solicita la opinión de la comunidad con respecto a un descuento de tarifa propuesto basado en los ingresos. El descuento que se plantea del 20% estaría disponible con la tarifa para el público en general, en viaje sencillo en los los autobuses de Tri Delta Transit en las rutas fijas y Tri MyRide el servicio para adultos elegibles de bajos-ingresos edades de 19-64.

Como participar:

1. Mira este video. **Encienda el sonido para escuchar el video.** Para recibir una copia de esta presentación llame 925-384-2522 o envíe un correo electrónico a [comments@eccta.org](mailto:comments@eccta.org)



2. Envíe un comentario público o una pregunta aquí:

Nombre	<input type="text"/>
Apellido	<input type="text"/>
Correo Electrónico	<input type="text"/>
Comentario o Pregunta	<input type="text"/>

Los comentarios públicos deberán entregarse para el 15 de Noviembre, 2020. Hay muchas formas de enviar una pregunta o un comentario público:

1. **Llamo** - 925-384-2522
2. **Fax** - (925) 757-2530 Attn: Public Comment
3. **Correo electrónico** - [comments@eccta.org](mailto:comments@eccta.org)
4. **Correo** o en persona:  
Tri Delta Transit  
801 Wilbur Ave.  
Antioch, CA 94509  
Attn: Public Comment

### Preguntas Frecuentes

Notice of Public Hearing

## Notice of Virtual Public Hearing

Tri Delta Transit is requesting public comment on a proposal to establish an income-based fare discount for regular service on Tri Delta Transit.

[REDACTED]

You can join this virtual public hearing anytime by visiting  
[www.TriDeltaTransit.com/PublicHearing](http://www.TriDeltaTransit.com/PublicHearing)  
or request information by calling 925-384-2522.  
Comments must be submitted by 11-15-2020.



## Aviso de Audiencia Pública Virtual

Tri Delta Transit está solicitando comentarios del público relacionados con la propuesta para establecer tarifas de descuento basadas en ingresos para el servicio regular de Tri Delta Transit.

[REDACTED]

Puede unirse a esta audiencia pública virtual en cualquier momento visitando este sitio [www.TriDeltaTransit.com/PublicHearing](http://www.TriDeltaTransit.com/PublicHearing) o solicitar información llamando al 925-384-2522. Comentarios públicos deberán entregarse para el 15 de Noviembre, 2020.

Community Based Organization Letter



**TRI DELTA TRANSIT**  
EASTERN CONTRA COSTA TRANSIT AUTHORITY

801 Wilbur Avenue  
Antioch • California 94509  
925 • 754-6622  
925 • 757-2530 FAX

October 19, 2020

Dear Community Member,

Tri Delta Transit is seeking public comment on an income-based fare discount for low-income adults age 19-64. The 20% discount will apply to single-ride general public fare on Fixed Route and Tri MyRide service.

A presentation packet, press release, and public notice are enclosed. Public comments must be received by November 15, 2020 and can be submitted through the following methods:

- Online
  - [www.trideltatransit.com/publichearing/](http://www.trideltatransit.com/publichearing/)
- Call
  - 925-384-2522
- Fax
  - 925-757-2530, Attn: Public Comment
- E-mail
  - [comments@eccta.org](mailto:comments@eccta.org)
- Mail or in-person:
  - Tri Delta Transit  
801 Wilbur Ave.  
Antioch, CA 94509  
Attn: Public Comment

If possible, please post and share the notification between now and November 15, 2020.

Sincerely,  
Tri Delta Transit  
Customer Service Department

Public Notice

East County Times

3280 Lone Tree Way, Suite 100  
Antioch, CA 94509  
925-779-7115

2018343

TRI DELTA TRANSIT  
ATTN: ACCOUNTS PAYABLE  
801 WILBUR AVE.  
ANTIOCH, CA 94509-7500

PROOF OF PUBLICATION  
FILE NO. Public Hearing Notice

In the matter of

East County Times

I am a citizen of the United States, I am over the age of eighteen years and I am not a party to or interested in the above entitled matter, I am the Legal Advertising Clerk of the printer and publisher of the East County Times, a newspaper published in the English language in the City of Antioch, County of Contra Costa, State of California.

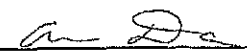
I declare that the East County Times is a newspaper of general circulation as defined by the laws of the State of California as determined by court decree dated January 6, 1919, Case Number 8268 and modified January 10, 2006, Case Number ND5-1494. Said decree states that the East County Times is adjudged to be a newspaper of general circulation for the City of Antioch, County of Contra Costa and State of California. Said order has not been revoked.

I declare that the notice, of which the annexed is a printed copy, has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to wit:

10/14/2020

I certify (or declare) under the penalty of perjury that the foregoing is true and correct.

Executed at Walnut Creek, California.  
On this 14th day of October, 2020.

  
\_\_\_\_\_  
Signature

Legal No. 0006524385

Notice of Virtual Public Hearing


Eastern Contra Costa Transit Authority (Tri Delta Transit) is hosting a virtual public hearing from October 14, 2020-November 15, 2020 to obtain community input regarding a proposed income-based fare discount that would provide a 20% discount for low-income riders on Tri Delta Transit fixed-route and Tri MyRide service. You can join the virtual public hearing website anytime by visiting [www.TriDeltaTransit.com/PublicHearing](http://www.TriDeltaTransit.com/PublicHearing) or call 925-384-2522 for more information.  
EOT# 6524385 Oct. 14, 2020

TRI DELTA TRANSIT

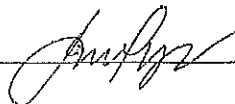
OCT 19 2020

RECEIVED

**PROOF OF PUBLICATION**

<p><b>THE PRESS</b></p> 	<p>TRI DELTA TRANSIT</p> <p>OCT 16 2020</p> <p>RECEIVED</p>
<p><b>NOTICE OF VIRTUAL PUBLIC HEARING</b></p>	
<p>STATE OF CALIFORNIA COUNTY OF CONTRA COSTA</p> <p>Jovel Parlog of said County, does hereby certify:</p> <p>That she is and was during all the times herein mentioned, a citizen of the United States, over the age of 21 years and neither a party to nor in any way interested in the matter or action herein set forth, and is and was competent to be a witness in said matter or action:</p> <p>That she is now and at all times herein mentioned was the principal clerk of the BRENTWOOD PRESS, publishers of the BRENTWOOD PRESS (No. 02-1273), which is and was at all times herein mentioned a newspaper of general circulation printed and published weekly in the City of Brentwood, County of Contra Costa, State of California, and as such principal clerk has now and at all of said times had charge of all legal notices and advertisements in said newspaper; that said BRENTWOOD PRESS is now and was at all times herein mentioned a newspaper of general circulation as that term is defined by Section 6000 of the Government Code, and as provided by said Section, is and at all of said times was published for the dissemination of local and telegraphic news and intelligence of a general character, having a bona fide subscription list of paying subscribers, and is not and at none of said times was devoted to the interests or published for the entertainment or instruction of a particular class, profession, trade, calling, race or denomination, or for any number of such classes, professions, trades, callings, races or denominations; that at all times said newspaper has been established, printed and published at regular intervals in said County and State, for more than one year preceding the date of the first publication of the notice herein mentioned; that said notice was set in type not smaller than nonpareil, and was preceded with words printed in black face type not smaller than nonpareil, describing and expressing in general terms the purport and character of the notice intended to be given.</p> <p>THAT THE</p> <p style="text-align: center;"><b>NOTICE OF VIRTUAL PUBLIC HEARING</b></p> <p>of which the annexed is a printed copy, was published in said newspaper and not in any supplement thereof on the following dates, to-wit:</p> <p><b>October 16, 2020</b></p> <p>I certify (or declare) under penalty of perjury that the foregoing is true and correct. Dated this 16 day of October, 2020.</p> <p>AD#: 84220</p>	
<p>Notice of Virtual Public Hearing Eastern Contra Costa Transit Authority (Tri Delta Transit) is hosting a virtual public hearing from October 14, 2020-November 15, 2020 to obtain community input regarding a proposed income-based fare discount that would provide a 20% discount for low-income riders on Tri Delta Transit fixed-route and Tri MyRide service. You can join the virtual public hearing website anytime by visiting <a href="http://www.TriDeltaTransit.com/PublicHearing">www.TriDeltaTransit.com/PublicHearing</a> or call 925-384-2522 for more information. Brentwood Press No. 02-1273 84220 Publish Dates: October 16, 2020.</p>	

SIGNATURE \_\_\_\_\_





# THE ANTIOCH HERALD

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 Antioch City Council  
 People, not politics!

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*NOTICE OF VIRTUAL PUBLIC HEARING*



Eastern Contra Costa Transit Authority (Tri Delta Transit) is hosting a virtual public hearing from October 14, 2020- November 15, 2020 to obtain community input regarding a proposed income-based fare discount that would provide a 20% discount for low-income riders on Tri Delta Transit fixed-route and Tri MyRide service. You can join the virtual public hearing website anytime by visiting [www.TriDeltaTransit.com/PublicHearing](http://www.TriDeltaTransit.com/PublicHearing) or call 925-384-2522 for more information.

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ECCTA Board Approval of Major Service Change Policy and Disparate Impact and Disproportionate Burden Policy



# TRI DELTA TRANSIT

Eastern Contra Costa Transit Authority  
801 Wilbur Avenue, Antioch, California 94509  
Phone: 925.754.6622 Fax: 925.757.2530

## RESOLUTION #200226A

Title VI Major Service Change Policy/Disparate Impact and Disproportionate Burden Policy

Resolution #200226A adopts ECCTA's Title VI Major Service Change Policy and Disparate Impact and Disproportionate Burden Policy, in compliance with FTA Circular 4702.1B.

**WHEREAS**, the Federal Transit Administration requires Eastern Contra Costa Transit Authority (ECCTA) to conform to Title VI of the Civil Rights Act of 1964, its amendments, and related statutes and Executive Orders, including Environmental Justice and Limited English Proficiency; and

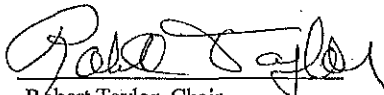
**WHEREAS**, ECCTA is required to comply with FTA Circular 4702.1B;

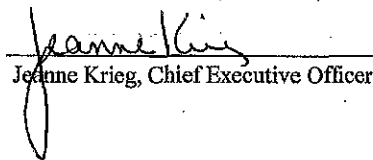
**WHEREAS**, ECCTA has established a Major Service Change Policy and Disparate Impact and Disproportionate Burden Policy complying with FTA Circular 4702.1B;

**NOW, THEREFORE, BE IT RESOLVED**, by the Board of Directors of the Eastern Contra Costa Transit Authority to adopt Resolution #200226A approving ECCTA's Title VI Major Service Change Policy and Disparate Impact and Disproportionate Burden Policy.

PASSED AND ADOPTED THIS 26<sup>th</sup> day of February 2020, by the following votes:

### EASTERN CONTRA COSTA TRANSIT AUTHORITY

  
Robert Taylor, Chair

  
Jeanne Krieg, Chief Executive Officer

AYES:	<u>11</u>
NOES:	<u>0</u>
ABSENT:	<u>0</u>
ABSTENTIONS:	<u>0</u>