



# MTC Regional Coordination Update



SamTrans Board of Directors | January 4, 2023

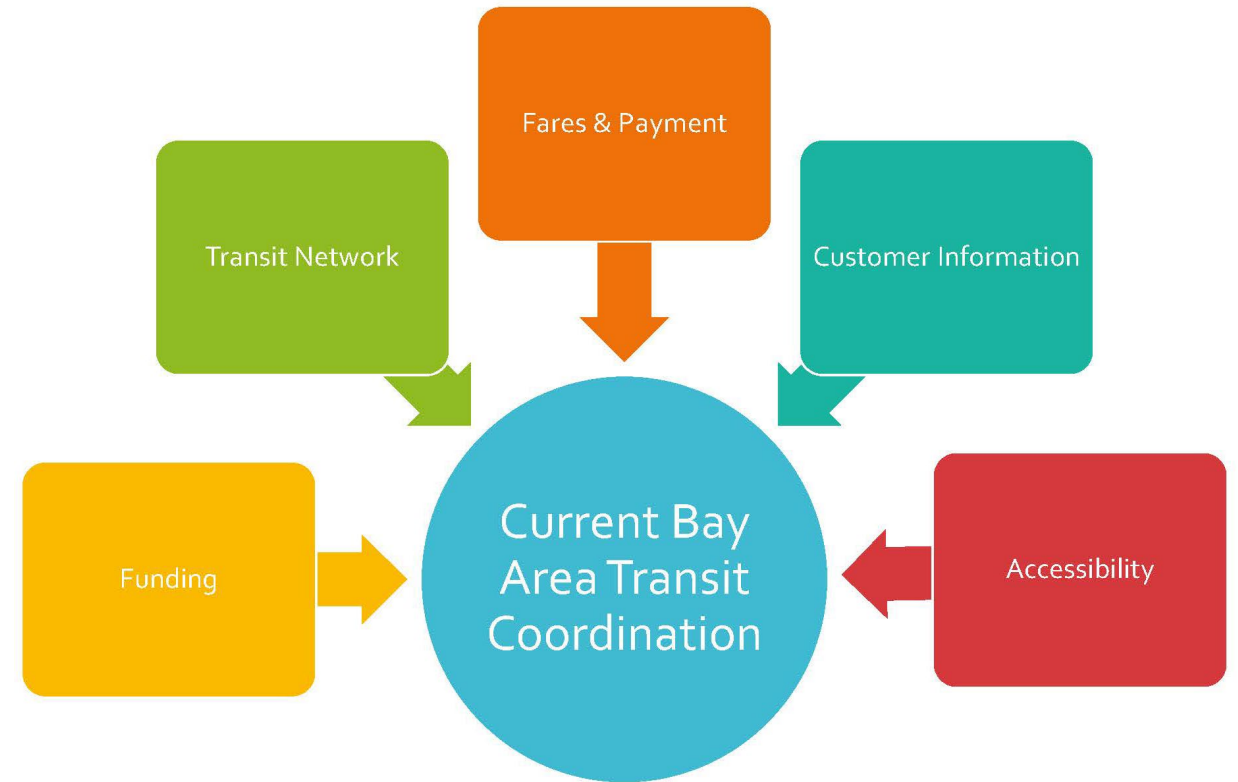
# Agenda

- MTC Regional Coordination Overview
- Major Project Highlights
  - Fare Integration
  - Next Generation Clipper (C2)
  - Mapping & Wayfinding
- MTC Regional Network Management Business Case Evaluation
- Look Ahead

# MTC Regional Coordination Overview

# Transit Operator Regional Coordination

- Transit Transformation Action Plan (TAP) (2021) identifies 5 transformational outcomes and 27 near-term actions
- Accelerated Items include Fare Integration, Mapping and Wayfinding, Bus Transit Priority, and Network Management Evaluation
- Includes ongoing weekly coordination by all operator staff and leadership
- \$5M Blue Ribbon funding set aside to support staffing (MTC and transit operators) on key TAP projects



# Major Project Highlights

# Fare Integration

- BayPass Pilot Program
  - Phase 1: Underway; includes 6 affordable housing sites in San Mateo County
  - Phase 2: Under development; rollout in mid-2023
    - Prepaid unlimited transit pass covering all operators for 10+ employers
- Free / Reduced Cost Transfers Pilot Program
  - Under development with Fare Integration Task Force
  - Pay the full fare on just the first agency you use
  - Transfers discounted up to \$2.50; all transfers to SamTrans would be free
  - Operators will need to opt-in to this pilot program (est. Spring 2023)
  - Rollout with Clipper Next Generation

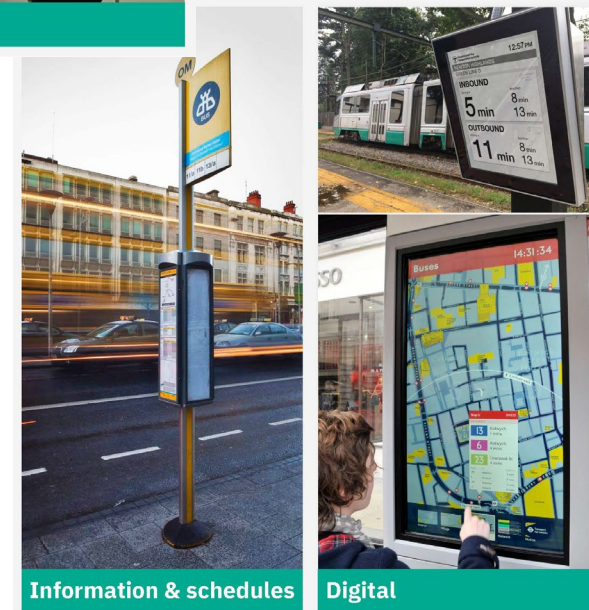
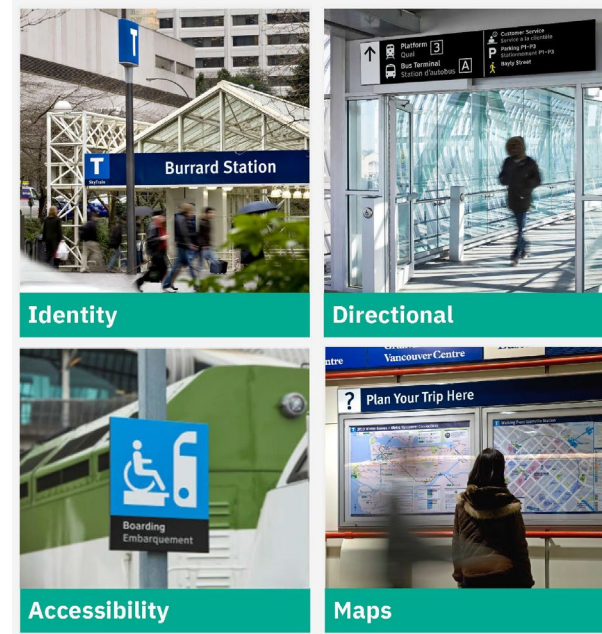
# Next Generation Clipper (C2)

- Opportunity to offer new fare products in Next Generation Clipper
- Daily and Monthly Accumulator Passes
  - Riders never pay more than the price of a day pass for rides in the same day
  - Cap monthly charges within a calendar month at the price of a monthly pass
  - Benefits: Proven equity tool, regional consistency
  - Staff studying potential financial implications, Title VI requirements
- Open Payment
  - Riders tap a credit, debit, or prepaid card to quickly and efficiently pay for bus fares.
  - Open payment would integrate with transfers and day/monthly pass accumulator rules
  - Benefits: Rider flexibility, Clipper fare products / pricing, potentially reduce dwell times
- Will come back to the Board for consideration with financial data and Title VI analysis



# Mapping and Wayfinding

- MTC programmed \$2 million in Oct 2022
- Contract awarded to Applied Wayfinding
- Co-PMs: Aaron Priven, MTC and Jumana Nabti, BART
- Project kickoff Dec 2022
- SamTrans staff involved in technical working groups
  - Marketing/comms, planning, IT/ITS, maintenance/facilities, bus operations





# MTC Regional Network Management (RNM) Business Case Evaluation

# RNM Background

Business Case focused on six representative areas of Network Management:

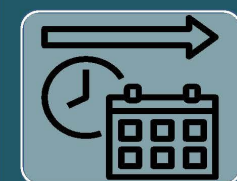
- Wayfinding
- Fare Integration Policy
- Accessibility
- Bus Transit Priority
- Rail Network Management
- Network Planning

## Selecting the Best Structure for Regional Network Management



### PURPOSE

- Business case to determine extent of authority and best form.
- Evaluate the benefits, costs, and risks of selected alternatives and present rationale for preferred solution.



### ADVISORY GROUP

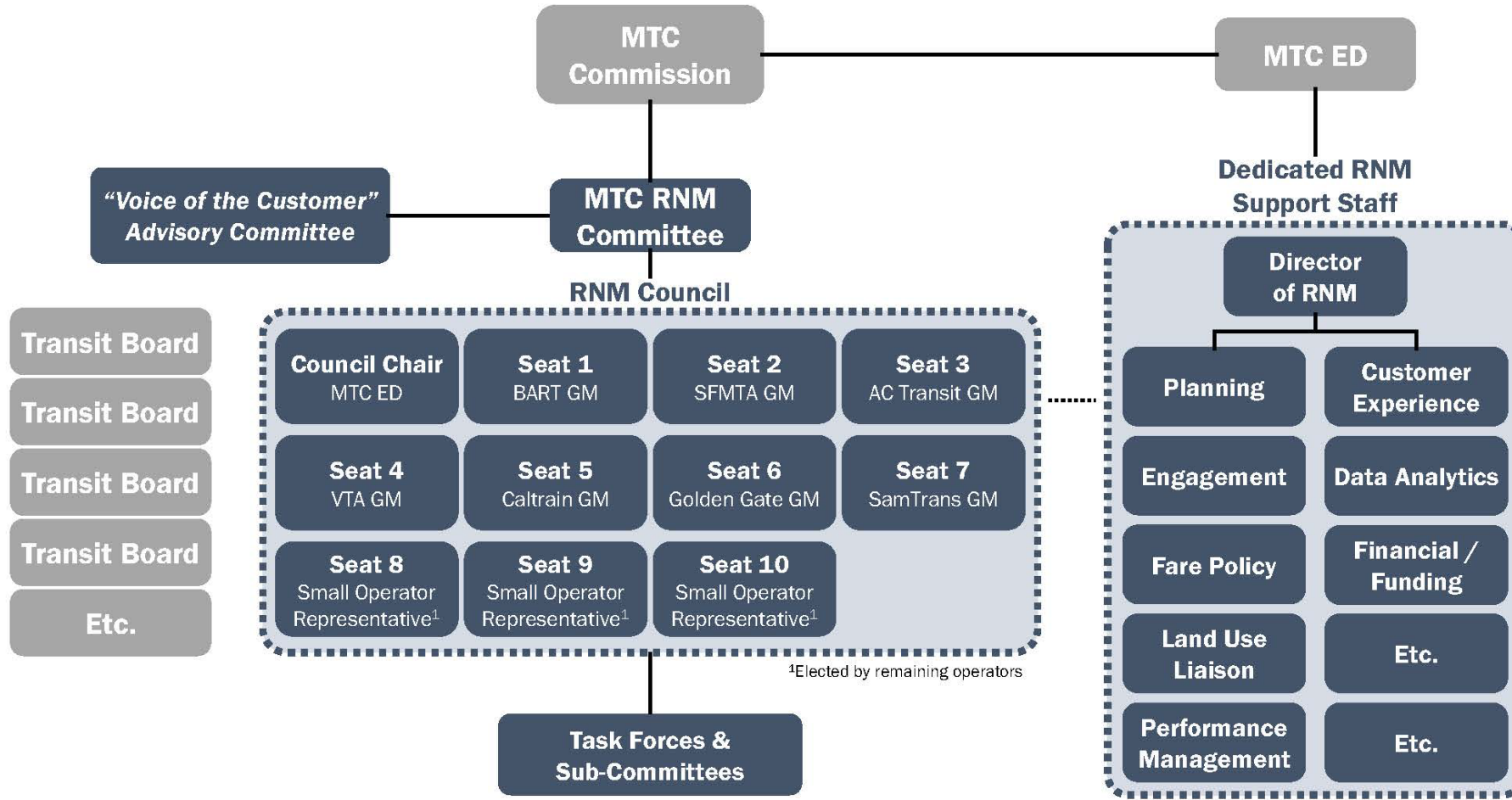
- Guide and review analysis and recommendations, provide periodic updates to Commission
- Limited Jan '22 – Dec '22 (~12 months)



### COMMISSION ACTION

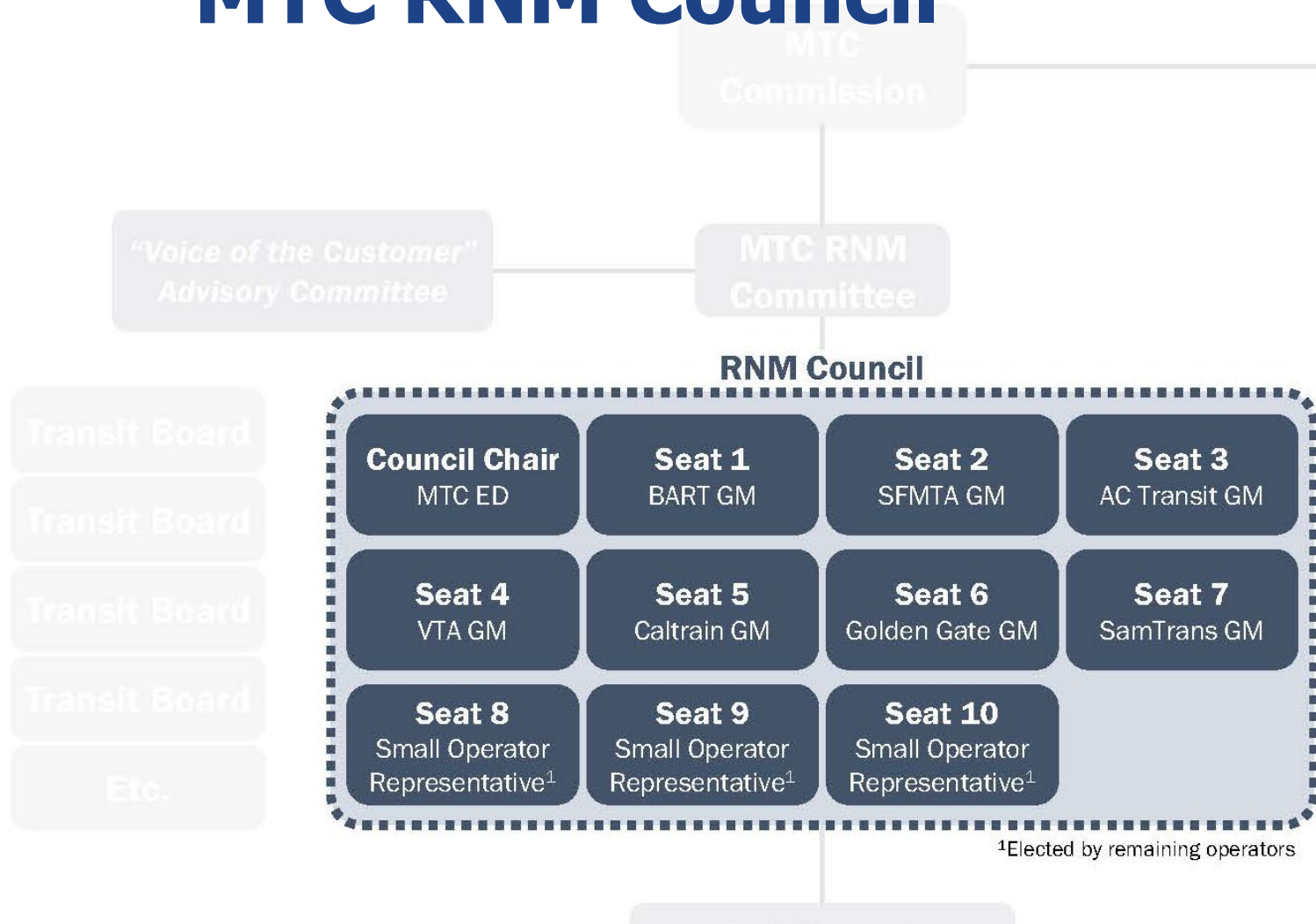
- Select Business Case Consultant
- Final action on Consultant recommendations (Feb 2023)

# Regional Network Management (RNM) Framework (Near Term)



- ✓ **Customer Focused:**
  - Enables highly inclusive decision making to bring a broad range of perspectives
  - Multiple engagement points for the “Voice of the Customer” to prioritize customers in decision making
- ✓ **Structured for Scale:**
  - Task Forces and Sub-Committees can be added or subtracted as additional Functional Areas are added or regional priorities shift
  - Team of Dedicated Support Staff can grow over time to provide needed capacity to Operators
  - Joint teams, with potential opportunities for seconded staff, enable high quality proposals to reach the Council, driving effective use of GM time
- ✓ **Balances Short-Term Momentum with Long-Term Transformation:**
  - Allows RNM to be stood up quickly to begin working on priority items, but also allows continuous evolution
  - Seeks to drive cost and time effectiveness
  - Feasible within current legislative constraints

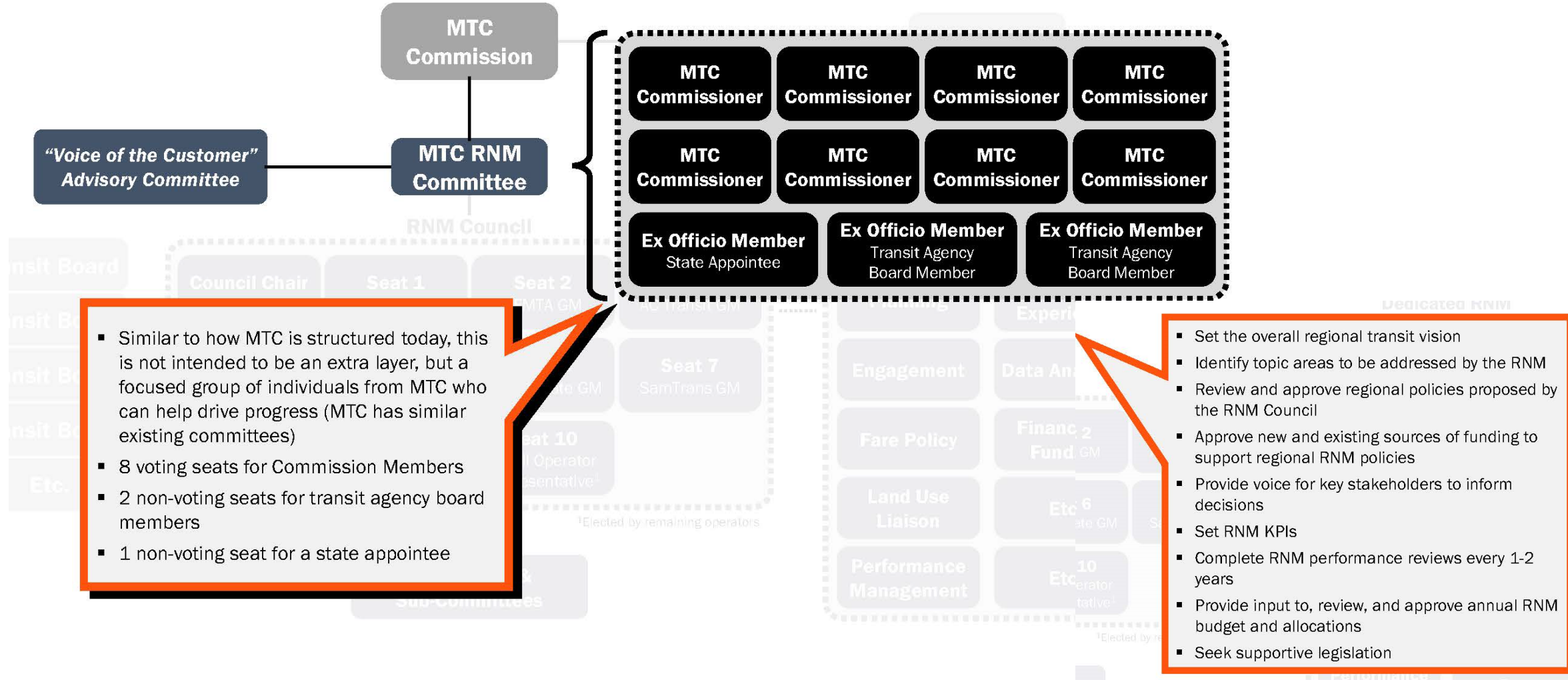
# MTC RNM Council



- Champion and advocate for regional priorities
- Provide consensus approval on policy recommendations (regional policies to then be approved by MTC; local policies to then be approved by Operators)
- Establish Task Forces and Sub-Committees
- Guide the Dedicated Support Staff, Task Forces, and Sub-Committees on priorities and the development of policies and action plans
- Monitor and report RNM KPIs
- Propose annual RNM budget and allocations
- Recommend RNM continuous improvement initiatives
- Guide implementation of regional policies and initiatives



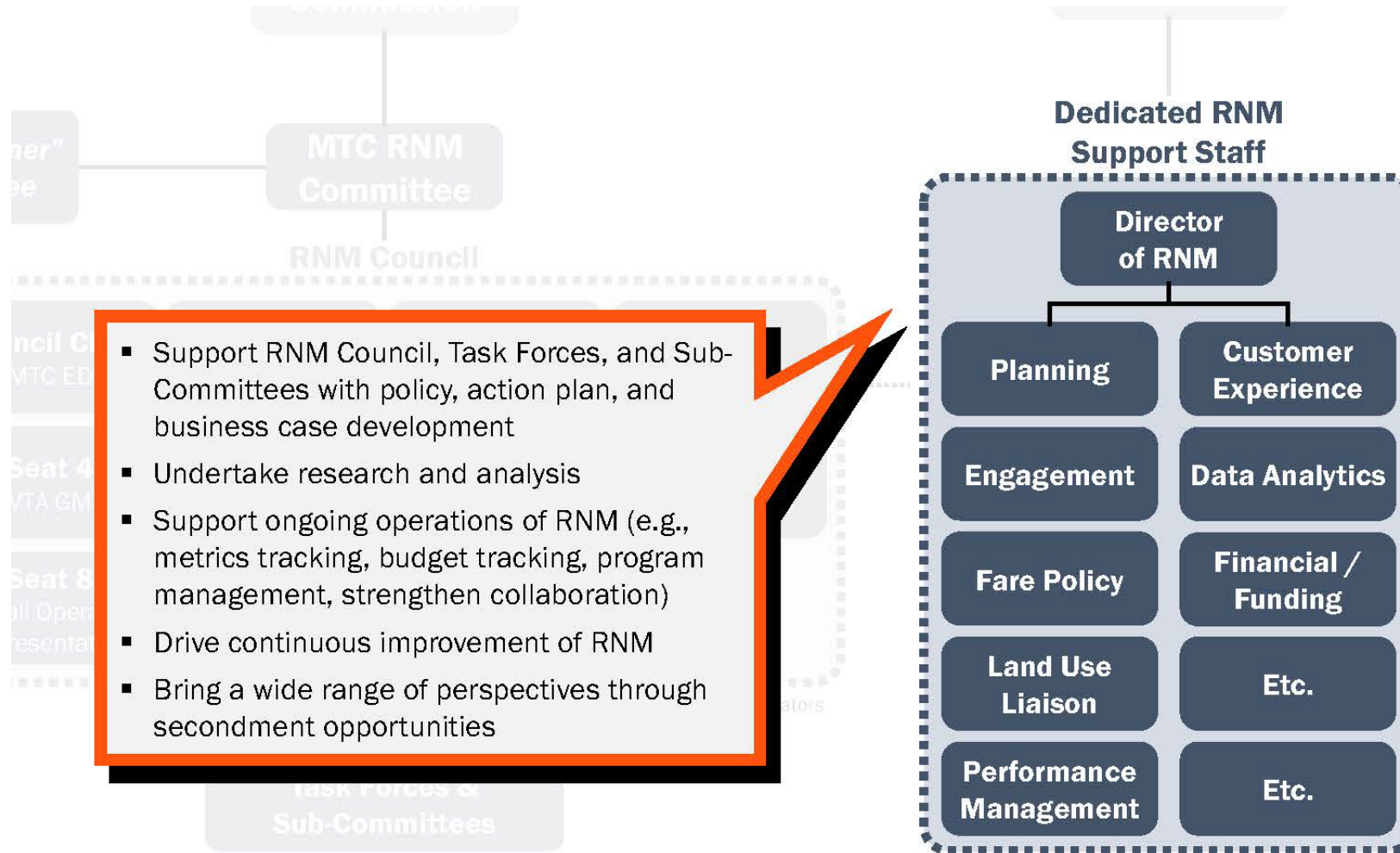
# MTC RNM Committee



- Similar to how MTC is structured today, this is not intended to be an extra layer, but a focused group of individuals from MTC who can help drive progress (MTC has similar existing committees)
- 8 voting seats for Commission Members
- 2 non-voting seats for transit agency board members
- 1 non-voting seat for a state appointee

- Set the overall regional transit vision
- Identify topic areas to be addressed by the RNM
- Review and approve regional policies proposed by the RNM Council
- Approve new and existing sources of funding to support regional RNM policies
- Provide voice for key stakeholders to inform decisions
- Set RNM KPIs
- Complete RNM performance reviews every 1-2 years
- Provide input to, review, and approve annual RNM budget and allocations
- Seek supportive legislation

# Dedicated RNM Support Staff

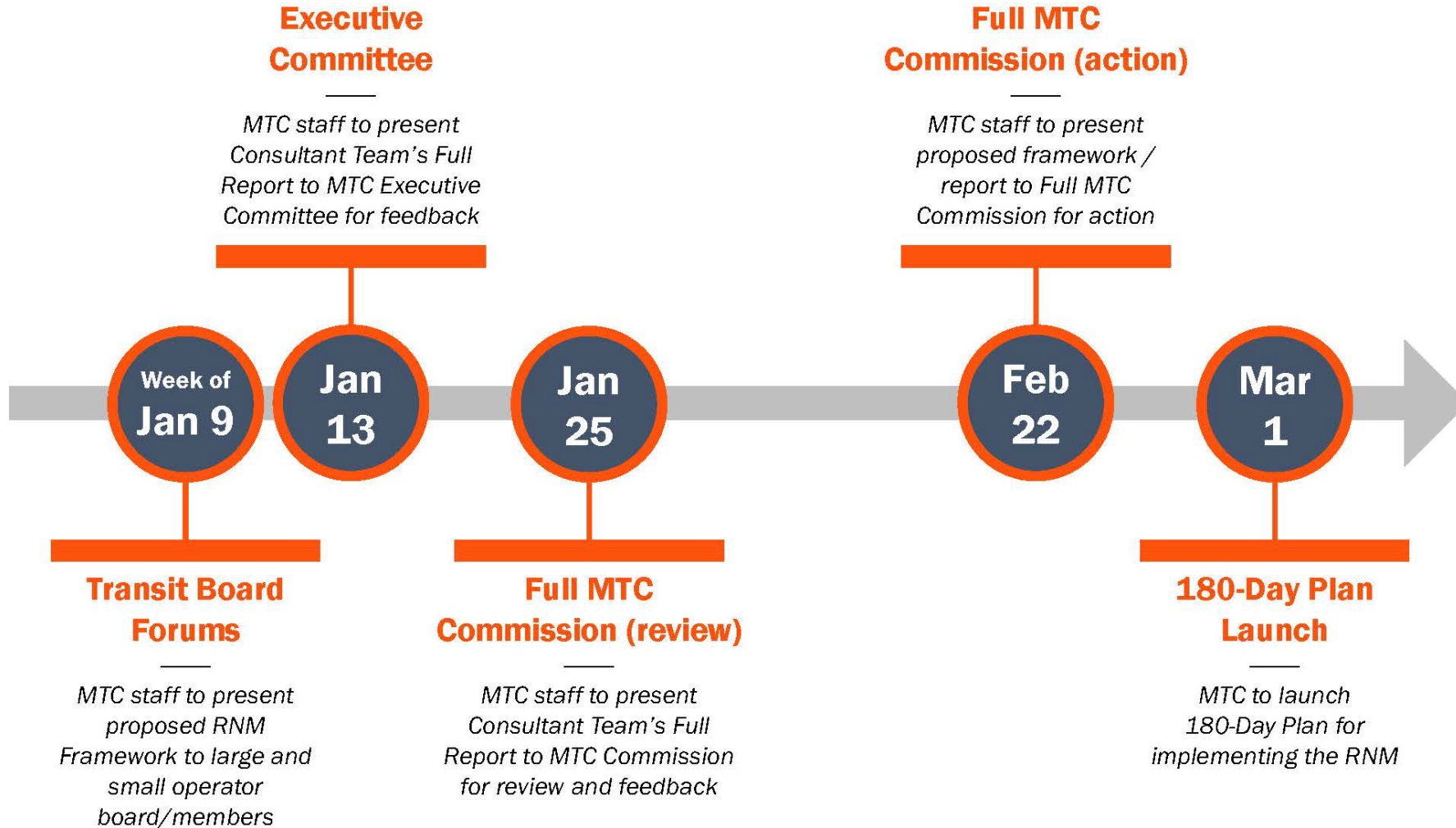


- Support RNM Council, Task Forces, and Sub-Committees with policy, action plan, and business case development
- Undertake research and analysis
- Support ongoing operations of RNM (e.g., metrics tracking, budget tracking, program management, strengthen collaboration)
- Drive continuous improvement of RNM
- Bring a wide range of perspectives through secondment opportunities

Estimated fully loaded staff costs for RNM Director and 2-3 dedicated staff = \$1.3M - \$2.1M



# RNM Next Steps and Milestones



# Look Ahead

# Look Ahead

- Spring 2023 Board of Directors Meetings
  - SamTrans Fare Program Changes, including Clipper Next Generation fare products
  - Authorize participation in MTC Free / Reduced Cost Transfer Pilot Program
  - Regional Network Management Transit Operator MOU
- Upcoming MTC TAP Projects
  - Connected Network Plan
  - Transit Priority
- Legislative/Funding Coordination
  - Working with MTC, CTA and Bay Area transit agencies



# Thank You! Questions?



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