

# Fare Coordination and Integration Study Update: Regional Institutional Pass Pilot

Citizens Advisory Committee  
June 15, 2022  
Agenda Item 7



# Presentation Overview

- Fare Coordination and Integration Study
  - Study Objectives
  - Policy Vision Statement
- Regional Institutional Pass Pilot
  - Overview
  - Phasing Plan
  - Funding Plan
  - Title VI
  - Approval Process and Timeline
- Questions and Discussion

# Fare Coordination and Integration Study (FCIS)-Objectives

- Developing goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;
- Identifying barriers, especially barriers related to fares and the user experience, that are impeding increased ridership;
- Identifying opportunities to increase transit ridership by improving the regional fare system through regional fare coordination and integration strategies; and,
- Developing a detailed implementation plan, including funding plan, for recommended improvements.

# Fare Coordination and Integration Study (FCIS)-Policy Vision Statement

- Adopted by the Fare Integration Task Force in Nov 2021
- Identifies four policy initiatives for advancement
  - **Deployment of an all-agency regional institutional pass product pilot in the current Clipper system (2022)**
  - Implement low-cost or no-cost transfers in Clipper 2.0 (2023)
  - Continue to develop the all-agency pass product in Clipper 2.0 (2023)
  - Continue to refine the vision of creating a common fare structure for regional services

# Regional Institutional Pass Pilot-Pilot Objectives

- Evaluate the degree to which transit pass covering all operators may increase transit ridership and better meet the needs of individual and institutional customers, as compared to single-agency passes.
- Collect data that could be used as the basis to develop a longer term revenue and pricing model for a permanent all-agency pass program.

# Regional Institutional Pass Pilot-Pilot Phasing Plan

- Phase 1 (Target of 8/2022): Public educational institutions and affordable housing properties
- Phase 2 (2023): Employers in transit-rich locations such as downtown San Francisco, Oakland, and San Jose
- Details will be finalized after the launch of Phase 1

# Regional Institutional Pass Pilot-Phase 1 Detail

- Scale: Up to 50,000 participants
- Target launch date: August 2022, continuing for two years
- Cost to participants: None during the pilot. All agency pass layered onto existing pass product (Clipper)
- Phase 1 Partner Institutions:
  - San Francisco State University
  - San Jose State University
  - University of California, Berkeley
  - Santa Rosa Junior College
  - MidPen Housing (3 Peninsula properties)

# Regional Institutional Pass Pilot-Funding Plan

- The MTC Commission has identified up to \$28M for fare integration activities, including \$6M targeted toward this pilot. The funding plan seeks to hold transit operators harmless for their participation.
- For pre-existing Phase 1 institution/agency pairs, business relationship will be unchanged.
- \$4.5M set aside to backfill fare revenue for new trips generated as a result of the pilot, half (\$2.2M) to be distributed up-front and half held as “top up” funds.
  - Caltrain to receive up to \$230k in up-front monies.



# Regional Institutional Pass Pilot-Title VI

- MTC will serve as lead agency for pilot program Title VI process.
- MTC and BART are working with FTA now to request permission for an initial pilot period lasting a minimum of 12 months.
- Data from the pilot will inform the Title VI analysis of any extension beyond 12 months and/or permanent program.

# Caltrain-Specific Considerations

- Caltrain has a robust existing institutional pass program (the GoPass).
- Regional all-agency pass provides a mechanism to build on the success of GoPass. If and when scale of program expands, regional pass could be a significant mechanism to bring new institutional riders and revenue to Caltrain
- No financial risk to Caltrain from current pilot, however ultimate selection of pricing and revenue model beyond pilot phase will be critical

# Regional Institutional Pass Pilot-Timeline and Next Steps

- June – Information Item
- July – Action to amend the Caltrains' Fare Structure
  - FTA Title VI waiver received
- August – Pilot launch
- September and beyond – Pilot ridership data collection and evaluation
  - Survey of pilot participants
  - Finalize Phase 2 details

# Questions?