

# **San Francisco Bay Area Rapid Transit District**

300 Lakeside Drive, P. O. Box 12688, Oakland, CA 94604-2688



## **BOARD MEETING AGENDA**

**Friday, February 26, 2021**

**8:30 AM**

**via Teleconference Only.**

**Board of Directors**



A regular meeting of the Board of Directors will be held at 8:30 a.m. on Thursday, February 25, 2021 and Friday February 26, 2021.

Please note, pursuant to Governor Newsom's Executive Order N-29-20 and the California Shelter-in-Place mandate, which prevents all but essential travel, public participation for this meeting will be via teleconference only.

You may watch the Board Meeting live or archived at <https://www.bart.gov/about/bod/multimedia>

Presentation materials will be available via Legistar at <https://bart.legistar.com>

You may also join the Board Meeting via Zoom by calling 1-669-900-6833

Access Code for Thursday, February 25, 2021: 932 7569 4930

Access Code for Friday, February 26, 2021: 925 3076 2738

Dial \*9 to raise your hand when you wish to speak. Public comment is limited to three (3) minutes per person.

If you wish to make a written comment:

Submit written comments via email to [board.meeting@bart.gov](mailto:board.meeting@bart.gov), using "public comment" as the subject line. Your comment will be provided to the Board and will become a permanent part of the file. Please submit your comments as far in advance as possible. Emailed comments must be received before 4:00 p.m. on February 25, 2021 in order to be included in the record.

Any action requiring more than a majority vote for passage will be so noted.

Items placed under "consent calendar" are considered routine and will be received, enacted, approved, or adopted by one motion unless a request for removal for discussion or explanation is received from a Director or from a member of the audience.

BART provides service/accommodations upon request to persons with disabilities and individuals who are limited English proficient who wish to address BART Board matters. A request must be made within one and five days in advance of Board meetings, depending on the service requested. Please contact the Office of the District Secretary at 510-464-6083 for information.

Rules governing the participation of the public at meetings of the Board of Directors and Standing Committees are available for review on the District's website (<http://www.bart.gov/about/bod>).

Meeting notices and agendas are available at [bart.legistar.com](http://bart.legistar.com); via email (<https://cloud.info.bart.gov/signup>); or via regular mail upon request submitted to the District Secretary.

Complete agenda packets (in PDF format) are available for review at [bart.legistar.com](http://bart.legistar.com) no later than 48 hours in advance of the meeting.

Please submit your requests to the District Secretary via email to [BoardofDirectors@bart.gov](mailto:BoardofDirectors@bart.gov); in person or U.S. mail at 300 Lakeside Drive, 23rd Floor, Oakland, CA 94612; fax 510-464-6011; or telephone 510-464-6083.

Patricia K. Williams  
District Secretary



Regular Meeting of the  
BOARD OF DIRECTORS

5. CALL TO ORDER

- A. Roll Call
- B. Pledge of Allegiance
- C. Introduction of Special Guests.

6. PUBLIC COMMENT-15 Minutes

(An opportunity for members of the public to address the Board of Directors on matters under their jurisdiction and not on the agenda.)

7. WORKSHOP - Continued.

- E. Update on Regional Transit Coordination: Transit Network Management.

Update on Regional Transit Coordination: Transit Network Management.

**Attachments:** [Update on Regional Transit Coordination - Transit Network Management - Presentation](#)  
[MTC Blue Ribbon Item 4abc - Network Mgmt PPT](#)  
[2021-02-22](#)  
[MTC Blue Ribbon - Item 5a-1 Return to Transit Focus Grp](#)  
[2021-02-22](#)  
[MTC Blue Ribbon - Item 5a-2 Transit Operator Boards](#)  
[Summarized 2021-02-22](#)

RECESS (10 Minutes)

- F. Strategic Homeless Action Plan.

Strategic Homeless Action Plan.

**Attachments:** [Strategic Homeless Action Plan - Presentation](#)

- G. District Retirement Incentive Program: Retiree Service Appreciation.

H. Workshop Recap.

Workshop Recap.

**Attachments:** [Workshop Recap - Presentation](#)

I. In Memoriam.



# Update on Regional Transit Coordination: Transit Network Management

BART Board of Directors

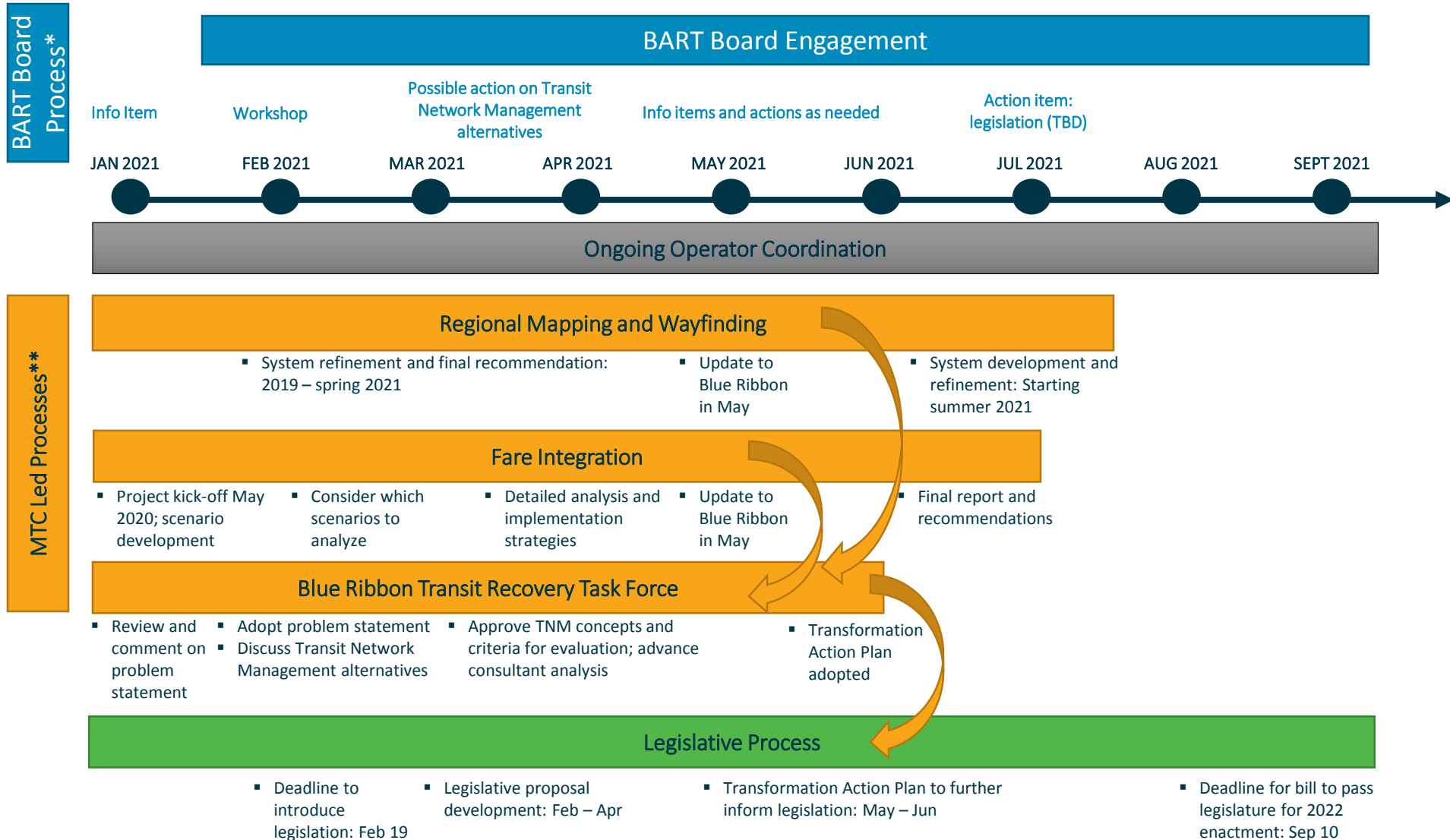
February 26, 2021

# Presentation Overview

1. Regional Coordination Overview and Background
2. Update on Key Regional Coordination Processes
  - Blue Ribbon Transit Recovery Task Force Process
  - Fare Integration Update
3. Discussion



# Regional Coordination Efforts: Multi-layered Process



\* The BART Board Adopted the Seamless Principles (Nov 2020)

\*\* MTC is also leading Bridge Forward, which includes **transit priority** projects and Safe & Seamless Mobility Quick-Strike Program

# Seamless Transit Principles

- In Nov 2020, BART became the first transit agency to endorse the Seamless Transit Principles
- They are focused on building a more integrated, efficient, and rider-friendly transit system



1. Run all Bay Area transit as one easy-to-use system



2. Put riders first



3. Make public transit equitable and accessible to all



4. Align transit prices and passes to be simple, fair, and affordable



5. Connect effortlessly with other sustainable transportation



6. Plan communities and transportation together



7. Prioritize reforms to create a seamless network

# State Legislation Anticipated

- Background

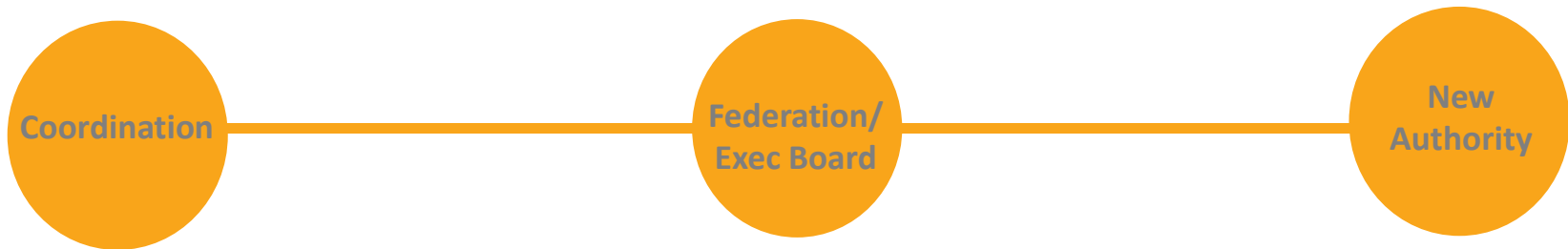
- State Assembly Member Chiu introduced AB 2057 in early 2020, sponsored by Seamless Bay Area
- Bill was tabled in Apr 2020 due to COVID (condensed legislative calendar and direction from leadership to limit bills under consideration)

- Anticipated Legislation

- Assembly Member Chiu plans to author new bill to implement task force recommendations
- Timeline
  - Deadline to introduce legislation Feb 19
  - Feb – Apr: Spot bill introduced and legislative proposal development
  - Feb – Jun: MTC Transformation Action Plan
  - Sep 10: Deadline for bill to pass Legislature for 2022 enactment
- Legislation will be brought to the Board for consideration

# Network Management and Governance

## Decision-Making Authority Spectrum



**Decision Areas:** Service/Schedules | Fares | Branding | Funding

### Questions

- **Authority:** What is the preferred balance of decision-making authority?
- **Funding:** What funding is identified for successful transformation?
- **Consolidation:** Should agency mergers or consolidation be considered?



# MTC Blue Ribbon Process Update

## Transit Network Management Alternatives Possible Roles & Responsibilities (local versus regional authority)

### • Customer Facing

- Fare policy and collection
- Network design, planning and coordination
- Service coordination
- Branding and wayfinding
- Station hub design review
- Technology and mobile standards
- Marketing and public information services
- Paratransit coordination
- Advance bus transit priority
- Micro-mobility integration

### • Administrative/ Institutional

- Strategic goals and standards
- Procurement and contracting
- Capital project prioritization
- Mega-project delivery and oversight
- Emergency coordination
- Data collection and coordination
- Program eligibility verifier
- Performance management
- Financial assessment and advocacy

### Questions

- Which topics are critical for BART to retain decision-making authority?
- What scope items are the highest priority or present the most potential benefits?
- Which topics Most clearly benefit from a regional decision-making authority?

# MTC Blue Ribbon Process Update

**Transit Network Management Alternatives: Key topics illustrate the complexity of defining roles and responsibilities**

Topic	Initial Considerations
<b>Network Design, Planning and Service Coordination</b>	<ul style="list-style-type: none"><li>• Efficiency and improved customer experience</li><li>• Balance regional and local considerations</li><li>• Service flexibility</li><li>• Funding adequacy and assurance</li><li>• Labor considerations</li><li>• Equity considerations and Title VI analysis</li></ul>
<b>Branding and Wayfinding</b>	<ul style="list-style-type: none"><li>• Improved customer experience</li><li>• Current effort underway by MTC</li><li>• Identity related to accountability voter support</li><li>• Funding adequacy and assurance</li></ul>
<b>Procurement and Contracting</b>	<ul style="list-style-type: none"><li>• Benefit may vary by discipline/ item</li><li>• Various small business and DBE goals/ requirements</li></ul>
<b>Fare Policy and Collection</b>	<ul style="list-style-type: none"><li>• Fare collection: Currently coordinated via Clipper and the Clipper Executive Board</li><li>• Potential implications for agency budgets/ need for subsidy</li><li>• Equity considerations and Title VI analysis</li><li>• Fare integration study illustrates the complexity of the possible issues related to fare policy</li></ul>

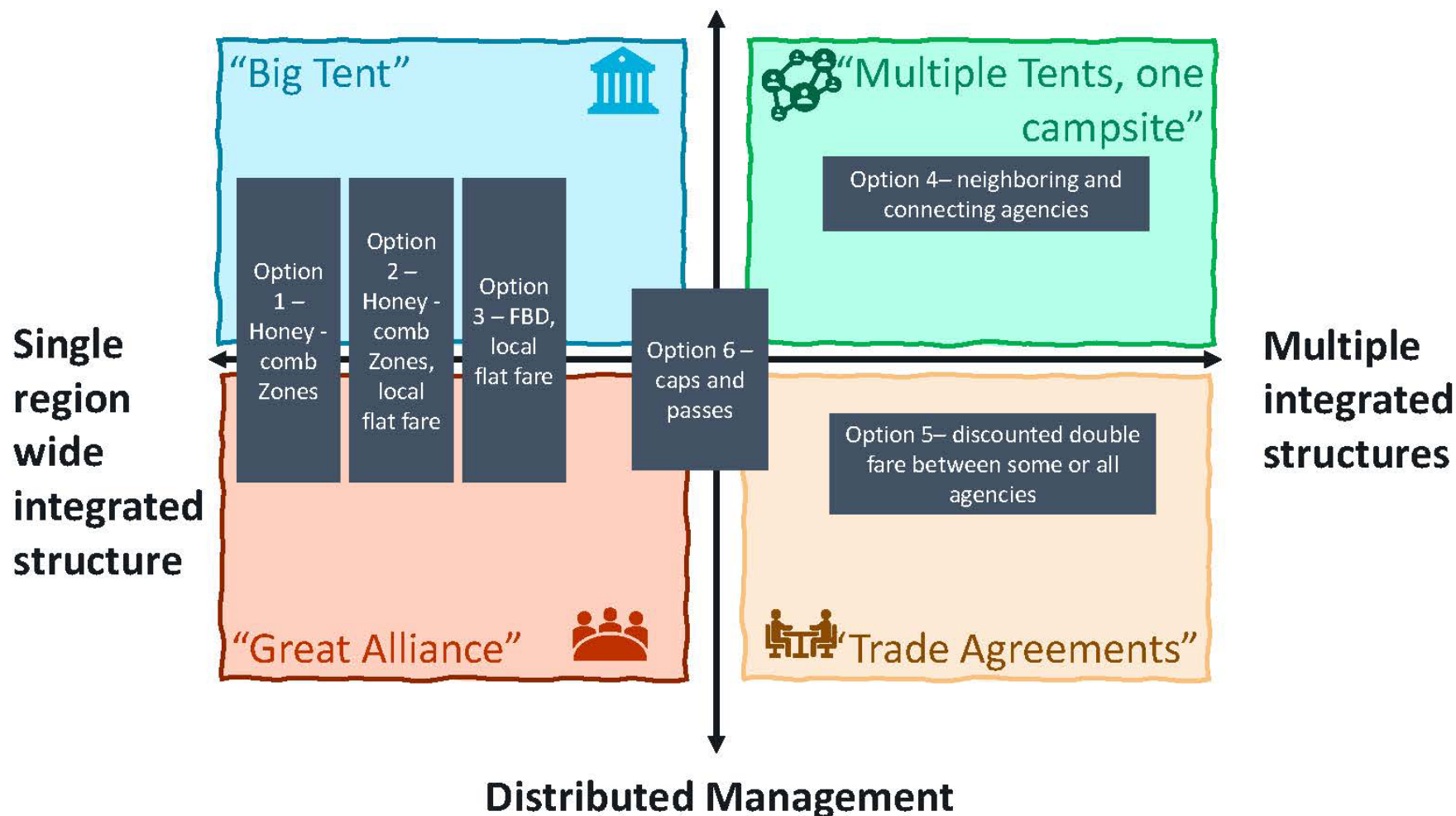
# Recent Fare Policy Coordination

1. Clipper Card Migration
2. Youth/Senior Fare Discount Alignment
3. Clipper START (Means Based Fare Pilot)



# Fare Integration Study: Policy Options Short List

**Managed by a single entity**



# Next Steps – MTC Processes

- MTC Blue Ribbon Transit Recovery Task Force (tentative)
  - February
    - Adopt problem statement, review, and discuss
    - Transit Network Management Alternative
  - March – May
    - Approve Transit Network Management concepts and criteria for evaluation
    - Sonoma County Transportation Authority – service consolidation and governance options
    - CalSTA presentation on State initiatives benefitting Network Management
    - Consultant evaluation of Network Management Concept Alternatives
  - June
    - Transformation Action Plan adopted
  - Business Case (timing TBD)
- Fare Integration Study
  - Final Report and Recommendations summer 2021

# BART Board Discussion

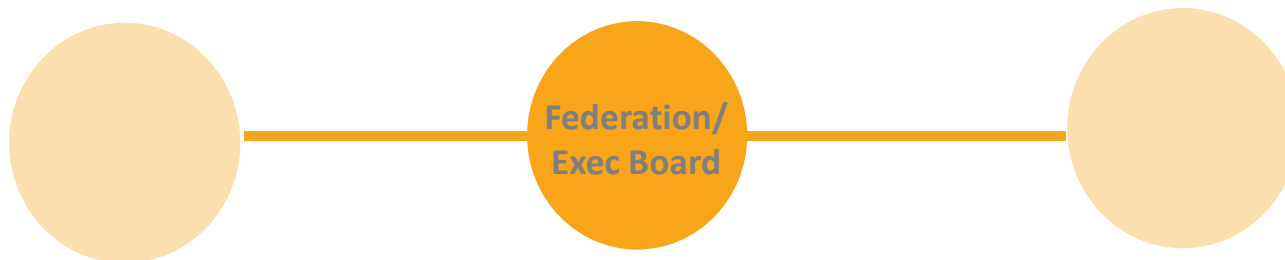
- What is the preferred **balance** of decision-making authority?
- Which network management roles/responsibilities:
  - Are critical for BART to retain **decision-making authority**?
  - Are the highest priority or present the most **potential benefits**?
  - Most clearly benefit from a **regional decision-making** authority?
- What is the **Business Case** for a Transit Network Manager?
- How does the Board want to lead on this?

# Supporting Slides



# Transit Network Management: Federation/ Exec Board Concept

- **Draft Concept** under development by Transit Operators for discussion
- **Formalizes unprecedented coordination** happening now
- Retains individual **agency control** and board **accountability**
- Recognizes **financial realities**
- Identifies **near-term priority action items**
- Ensures **public accountability & engagement**, such as Creation of a Policy Advisory Committee
- Suggests ideas for **membership** composition, including a subset of small & large operator general managers and MTC's Executive Director





# Fare Integration Study: Policy Options Short List

Short List	Overall Policy Changes
<b>1. Honeycomb Zones</b>	<ul style="list-style-type: none"> <li>• All modes use one fare structure - zones</li> </ul>
<b>2. Honeycomb Zones, local flat fare</b>	<ul style="list-style-type: none"> <li>• Local services (to be defined) would use a 'free transfer' flat fare</li> <li>• Higher order service (to be defined) would use zones</li> </ul>
<b>3. Fare by Distance, local flat Fare</b>	<ul style="list-style-type: none"> <li>• Local services (to be defined) would use a 'free transfer' flat fare</li> <li>• Higher order service (to be defined) would use FBD</li> </ul>
<b>4. Neighboring &amp; Connecting Agencies</b>	<ul style="list-style-type: none"> <li>• Logical agency pairs are identified and specific fare policies will be developed with an emphasis on:               <ul style="list-style-type: none"> <li>• Integrating higher order agencies where logical (example: aligning Caltrain and BART fares)</li> <li>• Reducing double fares for connecting services to higher order</li> <li>• Reducing double fares between neighboring local services</li> </ul> </li> </ul>
<b>5. Discounted Double fares</b>	<ul style="list-style-type: none"> <li>• Reducing double fares between individual agency pairs only</li> </ul>
<b>6. Caps &amp; Passes</b>	<ul style="list-style-type: none"> <li>• Setting up passes or caps at a multi agency or regional level</li> </ul>



BART  
**ba**



BLUE RIBBON



TRANSIT RECOVERY  
TASK FORCE

## GOAL 3: NETWORK MANAGEMENT AND GOVERNANCE

← University Ave

Transit  
Connections



February 22, 2021

## GOAL 3

**Identify near-term actions to implement beneficial long-term *Network Management & Governance* reforms**

Develop business case and identify specific next steps to deliver public transit network management and governance reforms that will fulfill long-term transit transformation.

## GOAL 4

**Establish how current MTC and state transit initiatives should integrate with *Network Management & Governance* reforms**

Review the scope, timing, and decision process of current MTC and state transit initiatives and identify specific actions to integrate them with Management & Governance reforms.





BLUE RIBBON



TRANSIT RECOVERY  
TASK FORCE

# REVISED PROBLEM STATEMENT

# PROBLEM STATEMENT PROCESS

February 22, 2021

## **BRTF Meeting #7**

Nov 16

Task Force approved Action Plan Goals & Objectives

## **BRTF Meeting #8**

Dec 14

Reviewed Key Challenge Areas to set stage for Problem Statement

## **Ad Hoc Problem Statement Working Group**

Jan. 8 + 15

Working Group met twice, plus additional calls between meetings

## **BRTF Meeting #9**

Jan. 25

Draft Problem Statement presented to Task Force for review and comment

## **Ad Hoc Workshop**

Feb. 17

Review and comment on Revised Draft Problem Statement

## **BRTF Meeting #10**

Feb. 22

Review, revise and adopt Problem Statement

# KEY REVISIONS TO PROBLEM STATEMENT

The following list describes the key changes proposed in the Revised Draft Problem Statement:

- **Context section** specifically identifies statistical information sources.
- **Problem Statement Summary**
  - Modified to use operators' preferred text to describe their institutional purpose
  - Text on lack of system-wide coordination entity moved to bulleted section
- **Organizational/Institutional Challenges modified to include:**
  - A stand-alone indication of the importance of transit priority projects
  - School service was removed because of great local variation in need and service
- **Customer Experience**
  - Changed in several instances to reflect variations among operator's challenges and acknowledge some studies are underway
- **Past and Current Disparities**
  - Substantially rewritten based on alternative text provided by Operators
- **Transit Costs and Funding**
  - Additional funding needed for more than regional transit coordination
  - Policy tradeoffs must be analyzed before shifting existing funding.





BLUE RIBBON



TRANSIT RECOVERY  
TASK FORCE

## NETWORK MANAGEMENT EVALUATION CONSULTANT SCOPE & TIMING



# NETWORK MANAGEMENT: EVALUATION PHASES

## By JUNE 2021

Blue Ribbon Task Force, Consultants

- Develop structure/ framework for business case analysis
- Identify business case data needs
- Identify Network Management governance alternatives
- Set “triggers” for initiating consultant’s Network Management Evaluation

## By DECEMBER 2021

MTC, Operator Staff, Consultants, Working Group

- Prepare business case data analysis
- Track Chiu legislation

## JULY 2021 – SPRING 2022

MTC, Operator Staff, Consultants, Working Group

- Implement Action Plan’s year-one Network Management priorities
- Proceed with the Network Management Evaluation

## BLUE RIBBON TRANSIT RECOVERY TASK FORCE

Define Network Management  
Evaluation Scope of Work

Introduce  
Consultant

Finalize Scope  
of Work

## ACTION PLAN IMPLEMENTATION GROUP

Carry out Network  
Management Evaluation

February/March 2021

April/May 2021

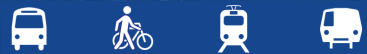
June/July 2021

Spring 2022





BLUE RIBBON



TRANSIT RECOVERY  
TASK FORCE

## NETWORK MANAGEMENT ROLES & RESPONSIBILITIES



# NETWORK MANAGEMENT BRAINSTORM: POTENTIAL ROLES/ RESPONSIBILITIES

(From January 25, 2021 Meeting)

## Customer Facing

- Fare Policy and Collection
- Network Planning and Coordination
- Service Coordination
- Branding and Wayfinding
- Station Hub Design Review
- Technology and Mobile Standards
- Marketing/ Public Information Services
- Paratransit Coordination
- Advance Bus Transit Priority
- Micro-mobility Integration

## Administrative/ Institutional

- Procurement and Contracting
- Capital Project Prioritization
- Mega-project Delivery and Oversight
- Emergency Coordination
- Data Collection and Coordination
- Program Eligibility Verifier
- Performance Management
- Financial Assessment and Advocacy

## CONCURRENT EFFORTS UNDERWAY – TRANSIT COORDINATION FOCUSED

### QUESTION :

*Does the Task Force need  
additional information to  
define how these initiatives  
are addressed in the Action  
Plan?*

### Concurrent Initiative/ Identify Priority

### Possible Linkages for Task Force:

#### Fare Coordination and Integration Study

- Act on Study – summer 2021
- Potential Action Plan near-term implementation priority

#### Regional Mapping and Wayfinding

- Refined program – spring 2021
- Program implementation – summer 2021
- Potential Action Plan near-term implementation priority

#### Advancing Transit Priority/ Reliability and Forward Projects

- Identify priority locations
- Streamline approval process
- Fund shovel-ready projects
- Potential Action Plan near-term implementation priority

#### Caltrans Partnership Grant — Rail Coordination

- Address governance evaluation and megaproject delivery and oversight
- Potential Action Plan mid-term implementation priority

# ORGANIZING ROLES & RESPONSIBILITIES BY PRIORITY

(Assignments for discussion purposes only)

## **BRTF Highest Priority**

### **Within 1 year**

- Implement Adopted Fare Coordination Study
- Return to Transit Campaign set in motion
- Expedited approval process for Bus Transit Priority
- Wayfinding Program refined/ Pilot projects started

## **BRTF Near Term Priorities**

### **Within 1 - 3 years**

- Network Connectivity Plan adopted (incl. transfers, hubs)
- Network Management reforms implemented
- Unified Real-time Travel information available
- Smaller Agency Management re-structuring complete

## **MTC-led Collaboration**

### **Within 1 - 3 years**

- Ensure Service Coordination
- Update performance standards
- Strengthen the Paratransit Program
- Prioritize Capital Projects
- Rail Grant evaluation complete

## **Operator's Voluntary Collaboration**

### **Operator's Voluntary Collaboration**

- Service Coordination
- Continue Paratransit Coordination
- Procurement and contracting
- Data Collection and Coordination
- Unify Emergency Coordination



[www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force](http://www.mtc.ca.gov/mtc.ca.gov/blue-ribbon-transit-recovery-task-force)





## TRANSIT RECOVERY TASK FORCE

Agenda Item 5a Attachment 2

TO: Blue Ribbon Task Force Members

DATE: February 22, 2021

FR: Ursula Vogler, MTC Staff

RE: Blue Ribbon Engagement Update

Over the past few months, MTC and consultant staff (led by EMC Research) have been working on transit rider and employer/schools research in order to determine the barriers and motivators for transit ridership, both pre-pandemic and currently. This work will be the foundation for creating communications aimed at restoring the lost transit ridership due to the Covid pandemic (Return-to-Transit Project) and will also assist in the transit network management effort. Below are the latest results of the research, along with near-term plans for future work.

### Focus Group Results

Last month for the Return-to-Transit effort, MTC's consultant team conducted eleven focus groups with transit riders and employers/schools to understand transit riding during the pandemic. Specifically, they held:

1. Six online focus groups with transit riders, which included:
  - a. Two groups with current riders who are transit dependent (including one group in Spanish)
  - b. Two groups with potential future transit dependent riders
  - c. Two groups with potential future transit choice riders
2. Five focus groups with employers and schools, which included:
  - a. 20 employers with 1-50 Bay Area employees
  - b. 10 employers with 50-100 Bay Area employees
  - c. 10 employers with 100-1,000 Bay Area employees
  - d. 10 employers with 1,000-10,000 Bay Area employees
  - e. 10 employers with more than 10,000 Bay Area employees

Within these groups, the following were represented:

- a. 10 government employers
- b. Two employers from each of the top ten industry sectors in the Bay Area
- c. 10 post high-school, higher education institutions
- d. Employers that span all nine-counties of the Bay Area

Results from these focus groups are outlined in Attachment A. The focus group results will feed into the public poll and employer/schools survey that are scheduled to be conducted in March or April. The survey results are scheduled to be presented to the Blue Ribbon Task Force this spring.



## TRANSIT RECOVERY TASK FORCE

### Future Research and Engagement Work

In addition to the Return to Transit work, MTC staff, along with EMC Research, will begin working conducting research and engagement that will provide input on the Blue Ribbon network management effort. This will include compiling input from transit riders on challenges they experience with transit, both pre-pandemic and currently, with a special focus on riders who are transit dependent. This includes:

#### 1. Comprehensive Research Review (February 2021)

Because a large volume of research on Bay Area transit currently exists, EMC Research will conduct a research review to compile information on transit challenges. Existing research efforts include: Plan Bay Area 2050 poll and online surveys, transit fare coordination/integration study focus groups, Clipper customer service surveys, transit mapping focus groups, along with work done by County Transportation Agencies (CTA) and transit operators. We will compare the results of the research review with the Blue Ribbon's adopted Problem Statement and the initial work on the network management's opportunity areas in order to confirm which topic areas could benefit from further coordination and identify where additional public input is needed.

#### 2. CBO discussion groups with transit dependent riders (March or April 2021)

In order to ensure we hear from transit dependent riders about the topics not addressed in the research review and to confirm their top priorities, we will hold four community-based discussion groups aimed at reaching the following:

- Transit dependent riders, English speakers
- Transit dependent riders, Spanish speakers
- Persons with disabilities
- CBO leaders/staff

The information heard from the discussion groups' participants, along with the results of the research review, will provide comprehensive input on the issues faced by transit riders. This information will be used to inform the transit network management process as well as the evaluation criteria of the proposed network management structure.





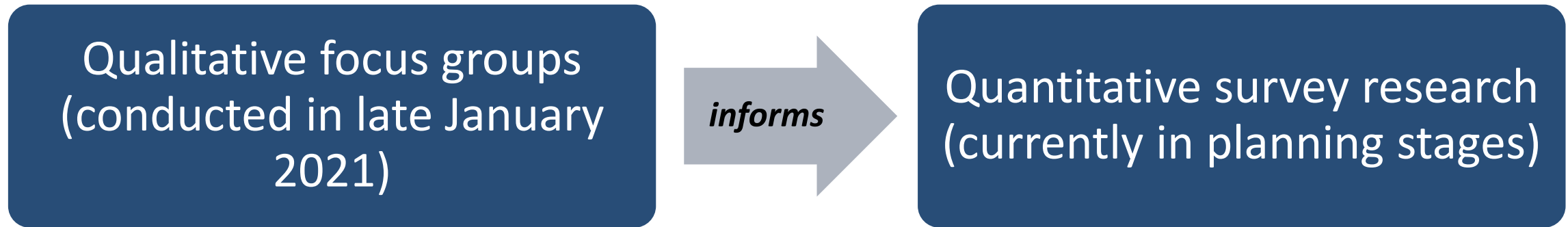
# MTC Return to Transit Research Program Update

Qualitative Research Draft Report

February 2021<sup>37</sup>

# Research Program Overview

- ▶ Two-step research program to understand attitudes about riding transit during the pandemic, and returning to transit going forward

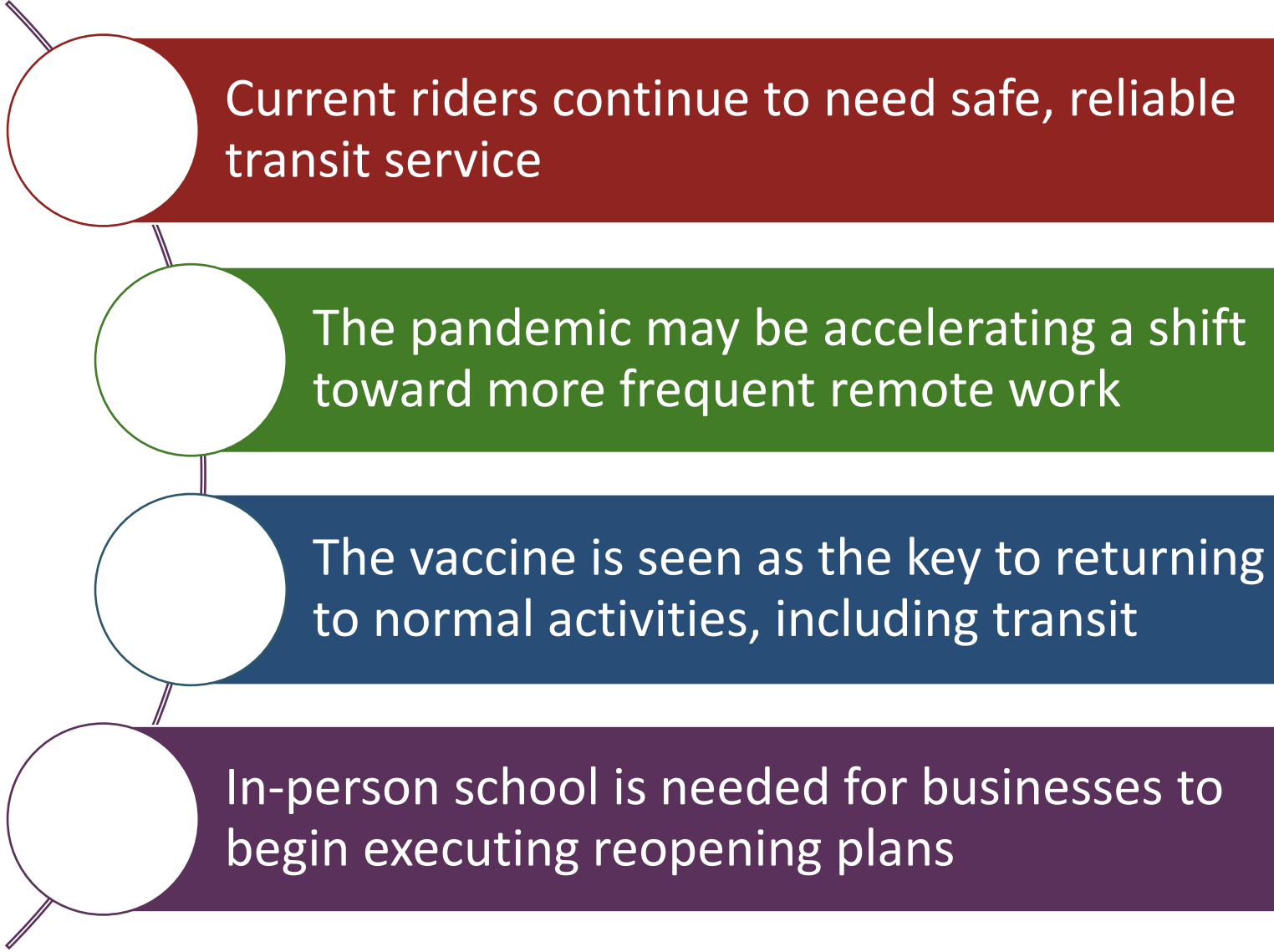


- ▶ Last month, we conducted a total of eleven focus groups:
  - Six with transit dependent and transit choice riders (one in Spanish), conducted by EMC Research
  - Five with employers and schools conducted by Bay Area Council

# Research Progress Update

The focus group research is beginning to validate some assumptions

*\*\*Note that the focus groups were conducted in late January, as COVID vaccines were beginning to roll out; this environment likely impacts how people think and talk about transit riding and planning for an uncertain future*



Current riders continue to need safe, reliable transit service

The pandemic may be accelerating a shift toward more frequent remote work

The vaccine is seen as the key to returning to normal activities, including transit

In-person school is needed for businesses to begin executing reopening plans



## Focus Group Finding: Current riders continue to need safe, reliable transit service

- ▶ Current riders continue to ride because they do not have other options
- ▶ Transit dependent populations are feeling the impact of service cuts and worried about permanently reduced service
- ▶ Being responsible for your own personal safety is just part of being a transit rider in the Bay Area, and has been since before the pandemic
- ▶ Confidence in environmental safety or the responsible actions of fellow transit riders is low

*"Public transportation is a need. We can't all drive. We can't all work from home. It's just impossible. There just has to be public transportation."  
-Transit rider focus group participant*

*"I'll still ride, because I need to get my medicine and I can't afford Uber."  
-Transit rider focus group participant*



## Focus Group Finding: The pandemic may be accelerating a shift toward more frequent remote work

- ▶ Urgency to return to shuttered workplaces is low, from both employers and the public; for those engaged in it, remote work is largely working
- ▶ Employers are sensitive to employee concerns around COVID safety and caregiving obligations
- ▶ Returning to in-person workplaces is likely to be gradual, and many do not anticipate commuting as frequently
- ▶ There is little evidence of long-term transit hesitancy

*"Working remotely has really worked well for me. I imagine that there will be some sort of hybrid where I would need to go back and be in person. But I don't imagine that it would be every day. I think it would probably be like twice a week or maybe three times."*

*-Transit rider focus group participant*

*"We're basically waiting for the public sentiment to shift in the global sense of optimism."*

*– Employer focus group participant*

## Focus Group Finding: The vaccine is seen as the key to returning to normal activities, including transit

- ▶ Many see widespread vaccination as the thing that enables a safe public health environment, where normal activities can resume without fear
- ▶ Employers are deferring to their perceptions of the concerns of their employees, and do not want to risk damaging their culture with discussion on returning to workplaces before employees feel ready
- ▶ When public health conditions allow for large gatherings to resume, that will signal that transit riding is adequately safe

*"I think that people will go back to transit after they have their vaccinations. I think that will be huge. All of a sudden from being not safe at all, you'll have at least 90% or 95% safety from getting COVID. People will be more careful, but I think everyone will go back to it."*

*-Transit rider focus group participant*

*"It's not an issue of the CDC guidelines. To a large degree, it's an employee retention issue of making sure that people feel that we're not pushing them back into the offices."*

*– Employer focus group participant*



## Focus Group Finding: In-person school is needed for businesses to begin executing reopening plans

- ▶ The re-establishment of consistent, stable in-person school will play a critical role in workplace reopening plans
- ▶ Many businesses are hesitant to commit to any plans while the school situation remains fluid
- ▶ Local control of school decisions makes anticipating timing challenging for local communities and workplaces, and everyone is not in the same phase

*“Part of this is if the school age children don’t go back [to school], I have a lot of staff who are homeschooling and have children at home... it’s a system interactive effect. It’s not just we decide and it happens.”*

*— Employer focus group participant*

# Next Steps

- ▶ Quantitative research with Bay Area residents (including transit dependent), employers, and schools
- ▶ Continue to build communication network connecting employers and schools with transit operators



## Blue Ribbon Transit Recovery Task Force

### Presentations/Listening Sessions for Transit Operator Board Members and General Managers

Small Transit Operators (1/28/21) and Large Transit Operators (2/1/21)

#### High-Level/Common Themes across both meetings:

- **Network Manager:** Both large and small transit operator board members and general managers expressed concerns about a Network Manager, and the possibility that by trying to solve one problem we will create others.
- **State of Transit:** Operators expressed a general sentiment that transit was performing well pre-pandemic and operators have only increased inter-agency coordination since COVID shelter-in-place. They feel there is a lack of recognition of this and other transit successes.
- **Goals:** Increased transit ridership, improved customer service and a better experience for riders are good goals. There is added value in making it easier for the rider to ride transit, making transit available to more people, offering a seamless experience for the user.
- **Equity:** Equity must remain in the forefront and transit operators must continue to serve transit-dependent riders.
- **Funding:** Across the board, partners and stakeholders are concerned about funding and the need for more/new/sustainable funds to support improvements.
- **Data:** Decision-making should be informed by data. Metrics to measure success should be included, and we should use a wider array of metrics than ridership numbers. Suggestions were made to review recent research and data collected for parallel efforts (fare integration, etc.) to help determine obstacles to transit ridership.
- **Local Service:** Small transit operators play an important role in adapting to and serving local needs, and local control allows this. Maintaining local service and local routes needs to be balanced with the advantages of central coordination.
- **Coordination:** There is agreement that coordinated schedules, and sufficient notice of schedule changes, improves service and supports seamless connections. More proactive coordination between large and small operators will benefit the system.
- **Governance:** The range of options and impacts need to be considered carefully. Accountability is important.
- **Timing:** Future remains very uncertain, and operators are focused now on recovery/survival and safety. The system is fragile right now.
- **Other Comments Captured:**
  - Interest in integrated public/private systems or other innovative solutions for last-mile services.
  - Dedicated lanes on bridges and highways are something we should be working on.
  - There should be a coordinated response to address homelessness and its impact on transit systems.
  - This effort should consider not only current and past riders, but how to encourage future new riders.

1/28/21 – Comment Summary from Small Operator Board Members and General Managers meeting:

**Transit Agency attendees:**

Stephen Adams, Union City Transit  
Jessica Alba, WETA  
Brian Albee, Sonoma County Transit  
Liz Alessio, Napa Valley Transportation Authority  
Charlie Anderson, WestCAT  
Judy Arnold, Marin Transit  
Teresa Barrett, Petaluma Transit  
Carol Dutra-Vernaci, Union City Transit  
Rachel Ede, Santa Rosa CityBus  
Diane Feinstein, Fairfield-Suisun Transit  
Ken Gray, ECCTA  
Pat Gacoscos, Union City Transit  
Jared Hall, Petaluma Transit  
Daryl Halls, Solano Transportation Authority  
Keith Haydon, CCCTA  
Lynda Hopkins, Sonoma County Transportation Authority  
Chris Kelley, WestCAT  
Beth Kranda, SolTrans  
Jeanne Krieg, Tri Delta Transit  
Joan Malloy, Union City Transit  
Farhad Mansourian, SMART  
Norma Martinez-Rubin, WestCAT  
Robert McConnell, SolTrans  
Kate Miller, NVTA  
Stacey Mortensen, ACE Rail  
Monique Moyer, WETA  
Seamus Murphy, WETA  
Sue Noack, County Connection  
Jaime Patino, Union City Transit  
Rick Ramacier, CCCTA  
Chris Rogers, Santa Rosa CityBus  
Shanelle Scales-Preston, Tri Delta Transit  
Michael Tree, LAVTA  
Nancy Whelan, Marin Transit  
Bob Woerner, LAVTA

**County Connection** – Noted that the number of transit operators can be is overwhelming. Streamlining that and fares is a good idea. But there is also a benefit of small operators. During this past year, County Connection adapted to local needs – serving Meals on Wheels, providing rides to seniors, etc.

**LAVTA** -- Agreed with goals of Task Force but questioned how to balance local needs with a desire to be centrally coordinated. Noted that 30% of LAVTA's service serves school routes. The "customer" isn't the same thing in each region. Most of the service now is local service, so how should we define the customer? Second point has to do with funding. How are you envisioning getting more funding? Is the

proposal to maintain funds that local areas are generating and add new funds, or are we going to have a zero-sum gain and reallocate?

**MTC Commissioner Papan** – My impression is that smaller agencies are more adaptable. I deal with the bigger agencies who for decades have not coordinated, and I think not assisted smaller agencies. If the bigger agencies were required to coordinate schedules, would that help smaller agencies?

**Union City Transit** -- With Union City Transit, we have flexibility. From a council standpoint, we have conversations about flexibility.

**MTC Commissioner Pedroza** -- We don't talk enough about what is working. Coming from Napa, our small operator adapted. A question to others in the meeting: What changes have been instituted that have brought back ridership?

**WestCAT** -- Appreciated learning about the Task Force. What we'd like to see included in future Task Force efforts and conversations is to keep in the forefront what the goals are for Task Force regarding equity and quality of service. Outcomes connote change, but to get there we must make assessments. What has been working well and what needs improvement? Are desired outcomes for individual riders or for regions? I want to speak for transit-dependent riders. Access mustn't be forgotten when we plan for a seamless system. Please highlight what are we talking about when we talk about access and advancing equity.

**Solano Transportation Authority** – When other operators such as BART or WETA make a schedule change, if there is consistency then it is easier to respond and have good connectivity. We engage with BART on how to better connect at the El Cerrito and Walnut Creek hubs, but more coordination would be better. We've also been piloting micro-transit for first/last mile and it is working. We have lots of localized programs. We need to come back more strategic, flexible.

**County Connection** – In our experience, BART has been very good to communicate with. When they change the schedules, we get advance notice to adjust our schedules. While there is always more that can be done, maybe we see different things in different areas. Our agency's history is tied to BART's. We provide bus bridges when Concord line is down. From my perspective, BART has been a great partner.

**WETA** -- Appreciates everything happening through the Task Force. The transparency and unity are remarkable. With regards to BART, coordination has been difficult but moving forward we know that Caltrain and BART are making efforts to coordinate schedules. A Transit Network Manager is a critical role that hopefully will come from this effort. Concerned about funding. What are the critical efforts and low-hanging fruit we can push forward first before we secure additional funding? All of this is happening in the environment of extreme uncertainty. Hopes that one recommendation of this Task Force is to extend the Clipper START pilot or make it a permanent program. As we talk about a Network Manager, we need opportunities to think about seamlessness across the system. We should take this time to turn Clipper 2.0 into Clipper 3.0, create a mobility-as-a-service platform, and make it an integrated public/private system. Excited about progress the Task Force has made in such a short and difficult time.

**WestCAT** – The Network Manager idea could be beneficial if it comes with funding, but we are concerned about local routes. As a small agency, we can be nimble. We operate efficiently and have a high farebox return for a small agency, don't want to lose that in the process. We have different kinds of riders: students, essential workers, college students, and workers going to SF on a one-seat ride. Lastly, in Contra Costa county, TriDelta, County Connection and WestCat work together well all the time.

**Denis Mulligan, GGBHTD, Blue Ribbon Member** -- As a large operator, I would like to give a shout-out to small operators. We've been coordinating for decades in North Bay. Connections are seamless. Small operators are vital. I don't want changes we look at to harm our small agency partners.

**Ian Griffiths, Seamless Bay Area, Blue Ribbon Member** -- Thank you to MTC for holding this meeting and engaging with operators and boards. We've done research on models for Network Management around the world to understand best practices for growing ridership. We shared some findings at an earlier Task Force meeting. These models range from one Network Manager and lots of operators that are seamless to customer. In other models, there is only one operator. These managed systems can be associated with high ridership and excellent customer service and high levels of local service. Maintaining local service is not at odds with network management – I see them as complimentary, but they need to be coordinated.

**WETA** -- This effort should be focused on making it possible for more people to take public transit in the Bay Area. This effort should be about making it possible for more people to choose transit rather than get in their car. Of course, we want to ensure that local trips and essential trips remain possible or are even more possible.

**Santa Rosa CityBus** -- There has been a lot of coordination between North Bay operators. We could use resources to boomerang our coordination and keep it going after the pandemic. We could use resources to help us show what is possible.

**LAVTA** – We should think about how to make transit more available to more people. We have a long way to go. In addition to the number of riders, when will you be putting out metrics that define how/if this is working? Have these metrics been articulated yet?

**Santa Rosa CityBus** -- We are approaching this from user standpoint, and working on better co-branding and co-marketing, better wayfinding. Looking at it from perspective of even if operations are not consolidated, the experience is seamless for the user. Main metric we've been using is on the return trip ridership.

**County Connection** -- 80-85% of County Connection's riders stay in our region, and we want to meet their needs. When ridership dropped during COVID, we repurposed our fleet for Meals on Wheels and other needs. When people do leave the region, they view the Bay Area as connected. We support that overall concept, but our primary focus is our local ridership. That is also our source of funding. The balance is the challenge.

**John Ford, Commute.org, Blue Ribbon Member** -- Next step in the transportation ecosystem is public/private partnerships that provide shuttles and connectivity to local service and wider region. It is important that we include them in coordinating efforts.

**WestCAT** -- Responding regarding metrics, suggested that we don't use just one metric. When we talk about efficiency, we get to the cost of things. What those things are must be part of the discussion. Let's not leave it to a single metric of increased ridership. It is essential that the Task Force recognize there are different means of weighing things and, prior to that, measuring them.

**MTC Commissioner Papan:** Regarding coordination and connectivity, we have new and existing stations, some in our area are being deconstructed, what is going on elsewhere?

**County Connection** -- County Connection has a good relationship with BART, but this is interesting and a thorny issue. We are constantly trying to educate our public on how to use the two systems effectively. There are resource issues between how many BART trains there are and how many buses. We can't serve every train with a bus. The Contra Costa Transportation Authority are innovating solutions for first and last miles. We must keep working on it as we move the technology along.

**Solano Transportation Authority** -- Our partnership is strong with Capitol Corridor. We also have a strong relationship with WETA. SolTrans, Napa Vine and WETA are working together on a coordinated plan. Perhaps we all need to be more proactive with BART.

**LAVTA** -- LAVTA coordinates a lot with BART -- 80% of LAVTA bus routes end at a BART station. I am hearing that it is important for local agencies to retain local control. Pre-COVID, we had 10% ridership increases each month, thanks to local board working with communities.

**Chair Spring** -- Thank you all for joining us tonight. We on the Task Force want to come up with recommendations we feel we can accomplish. Change is needed and we need to do what we can. We are not seeking to eliminate small operators, that is not the case. Working together, we can make this a much better transit system.

**Therese McMillan, MTC** -- Grateful for the time you've given. The topline takeaways: COVID for all the trauma it has provided has thrown a spotlight on small operators' ability to be service innovators and support equity. As we come back, our transit-dependent population can't be left behind. I heard that you appreciate the idea that we need a better transit system for the region, but there are many layers to that system. Your insights were thoughtful, thank you.

**Public comment --**

- David Pilpel -- Recently sent two short letters to MTC about transit coordination, suggesting looking at this by area and mode. I support having fewer than 27 but more than 1 agency -- provided examples. As to modes, how many ferry operators does the region need. As to rail, ask ACE, Caltrain, Capitol Corridor etc. what would help them? Joint Powers agreements and MOUs are great tools. Also it would be great if staff could summarize tonight's discussion points to post on the web.

- Roland Lebrun – I’m still confused what problem we are seeking to solve. As an outsider, it seems to be that the obvious network manager would be BART.

2/1/21 – Comment Summary from Large Operator Board Members and General Managers meeting:

**Transit Agency attendees:**

Gwyneth Borden, SFMTA  
 Dev Davis, Caltrain  
 Amanda Eaken, SFMTA  
 Mark Foley, BART  
 Carol Groom, SamTrans  
 Chappie Jones, VTA  
 Elsa Ortiz, AC Transit  
 Barbara Pahre, GGBHTD  
 David Pine, Caltrain/Samtrans  
 Rebecca Saltzman, BART  
 Charles Stone, Caltrain

**AC Transit** - Appreciated being invited to join the working group. Acknowledged frustration by GMs for lack of recognition for what we are doing, how many of our trips are local, transit dependent, we recognize there’s an opportunity, but we encourage a link to funding to pay for these improvements. Appreciates the diversity of the group – labor and community stakeholders, but we are very much in recovery and having to leave riders at the stop due to social distancing requirements.

**BART** - Acknowledged Chair Spering and said he was well chosen to head up this effort. Acknowledged Steve Kinsey and his difficult task to round up all these different points of view. Noted operators have been working very closely together since onset of pandemic. We have stepped up our coordination even though there are always ways to improve. But we can build on this. The background work has been done, now the discussions are really going to be timely as we get into everybody’s budget season. We need to keep that in mind as we go forward.

**Caltrain**– It’s not fair to say that the effects of COVID on transportation are permanent – there is so much unknown. MTC doesn’t have customers. If anything, we are your customers. To the extent that this conversation is one about wresting local control from us you should be cautious. We know what we are talking about. Many of the GMs are already working on equity, but we are hearing that those efforts aren’t being recognized. Unfunded mandates are anathema to good government. Hope that any recommendations come with a funding source. We should be careful that we don’t eliminate the nimbleness that local operators have. Caltrain and Samtrans got tired of waiting for Clipper2.0 so rather than wait we formed mobile apps that enabled our riders to purchase fares more quickly. If what I’m hearing is accurate, the world that you envision would not have allowed us to do that. It’s interesting that you seem to already have the framework for a solution but only have a draft problem statement. Chair Spering – noted the solution has not been determined yet. The idea that the system doesn’t need improvement is a mistake, but we’re not going to make changes without the large operators’ cooperation. We have a legislator that wants to do something about it. Hopefully, everyone on this meeting will help us formulate the solution.

**SFMTA** –Associated their comments with Caltrain. Being able to operate effectively as an agency is something about which we are concerned. People just want us to perform well. They don't have the patience for massive organizational change. What they care about is how much time that trip takes. How can we help with the connectivity of our schedules so that people want to make the trip again? Dedicated lanes on bridges and highways are the types of things we should be working on rather than getting bogged down on governance issues. The GMs are already working collaboratively, and we can focus on lining up union schedules for greater connectivity. Make it easier for the rider to ride transit – it doesn't matter the brand. Very supportive generally of the idea of a network manager and how we can work together.

**AC Transit** – Noted SFMTA and Caltrain raised valid issues. The concept of a network manager is good, but devil in the details. On issue of governance, it hasn't been explained. We are a special district and an elected board. Does that mean the governance will be removed from the board and they [the network manager] will make policy decisions? For example, fares are a decision that an elected board makes. Funding – how is reimbursement going to be made? How would local measures work, such as the Measure BB in Alameda County that provides specific funding for programs? Each of these agencies have their own labor contracts. How will those be negotiated? Someone mentioned that you are following European style, but in Europe, benefits are provided by the government, not the labor contracts. In those contracts, there are issues like where do the drivers go? For example, most of AC transit riders travel within a 4-mile radius. How will a seamless system benefit our riders? It will be helpful to hear these details and whether they will be provided in the legislation.

**BART**–The BART board is supportive of the concept - we were the first agency to unanimously support the seamless principles. We have a committee between BART and AC Transit that's been going for about 7 years. Happy to see this moving forward at the regional level. The question is how it's done and ensuring that trying to solve one problem, we don't create another. We can make everything sync up and the fares the same but if that means operators must reduce service it all falls apart. We must have a funding backstop, so we aren't fighting each other. This is especially important over the next several years because at BART at least we don't think we'll return to normal for many years. These are the things about which we must think. Another board member mentioned labor contracts. We can't break those. Our union partners – they have done so much in the pandemic working so closely and been such willing partners. One other consideration is whether the network manager is MTC or thru MTC – we have a problem with accountability – no seat on MTC due to having a directly-elected board, like BART. This is something that's very important that there is representation and that the operators' needs are being considered.

**Samtrans** – This is about local control. Local people take transit and know their board members. As we grow, I have concerns about a very large agency and how we get down to the person who buys their bus pass to get to work.

**MTC Commissioner Alfredo Pedroza** – Thanked Sperling for arranging these listening sessions with the small and large operators and for all the operators you have done to collaborate. It's been good to hear this. This is not about dismantling what's working. COVID has provided us with an opportunity to listen. We have a commitment to do this *with* you, but also being willing to get a little bit uncomfortable to look for opportunities to make improvements. I ask that you stay engaged. This is intended to be done with you and not *at* you.

**Caltrain** – Wanted to echo the comments from earlier Caltrain representative. We all want to improve the usability of the system. When it comes to funding, I have a lot of questions. This doesn't feel like a fully formed idea. Where has it been done before? Anywhere in the U.S.? Where has it worked? How long did it take? I was many years ago an intern at Pierce Transit who was trying to coordinate with just two agencies for decades. Most of the people who take transit are just staying within their county. I just have more questions than I have opinions at this point. We have a lot more work to do to see what's been done elsewhere. I'd like to see a timeline, funding plan, and how we are going to keep the focus on the local transit rider as the bulk of transit riders are.

**BART**– We can't predict the future or control which employers will offer telecommuting. We don't know if many former riders may prefer to drive. The average worker is asking how can I change my life, do I need to commute the same way? How do we phase this in? The current issue is, is transit safe? Is it touchless? If we can't address those things, I don't think people return. Midterm, homelessness. MTC should be coordinating with all our agencies to address homelessness. The state has failed us. We ought to work together to come up with a solution that involves cities and counties. We need to provide rides that are perceived as safe. Coordinated scheduling is tremendously important. Lastly, long-term, seamless fares and sustainable funding is the big issue. How do we prevent these peaks and drops in ridership? On local control, I was elected by my constituents who may want no fares, but how do I balance that with the direction I might receive from a network manager?

**MTC Commissioner Papan** - Noted in response to concern about MTC not having customers, that it has constituents. Noted connectivity challenges at BART and Caltrain. We have a common goal – we want to get people back on transit by better coordination and working together to make it convenient for the riders. It is their quality of life when schedules don't match up. When they don't have access to the stations. Some of the great things the task force is doing is working with so many of you to make the system better than ever before. It is going to take a lot of work together. There's no established determination of "this is what the manager is going to do." That's something to be figured out in legislation. Some of us think legislation is needed to bring some agencies together. There are many different areas to work on.

**James Lindsay, ATU, Blue Ribbon Member** –What I've heard tonight is what I hear at the negotiating table; concerns about control and taking money away. I couldn't imagine this being any different. This is going to be a tough pass, a tough road to hoe, finding that fine line of local control and funding. I know the Assemblymember is going to have a hard time getting additional funding, so not sure where it will come from, federal funding a possibility but may not be long-term solution.

**Caltrain** - Nobody can say there hasn't been measured improvement in transit performance. Caltrain ridership growth pre-pandemic was strong. I would like to not hear words like dysfunctional so much, because 70% of voters thought transit was good enough to tax themselves for Caltrain. We can always do better but we've been doing pretty good in a lot of ways.

**Randy Kinman, MTC Policy Advisory Council, Blue Ribbon Member** – Nobody is calling any agency dysfunctional – but common long-standing pre-pandemic complaints from the public is that while they can get around on their local system there is no fare they can count on, no connectivity they can count on. We know you've been doing a good job and come together extremely quickly during the pandemic, but what we want to do now is to have a conversation about how to make the system work better at a consistent level across the Bay Area. Post-pandemic, we have to have a system in place. Your ridership shows most of your riders just use your system, but you aren't seeing the riders that don't use the



system because it's so difficult, not seamless and expensive. If we want everybody to operate better and maintain local control, what are those things that we can take back to the task force to work on?

**Caltrain** —One of the things we preach in our own agencies and regionally is importance of frequency, reliability and time. To the extent that we can work together on those, we are more successful. We try to be data driven. Some of the data derived from the fare integration task force has asked, what are the top obstacles to people riding transit? This will help inform the decisions about what is best to focus on to increase ridership. Is it on frequency, reliability and time overall, or connectivity? This will help guide decisions down the line.

**SFMTA** – I'm hearing a lot of acknowledgment of the problem and support for a high-level integrated system but it's no surprise that it gets more difficult as we talk about the solutions. What are the tradeoffs for each of these solutions? And how do we pay for this? We need to remember the larger context that we are in during this pandemic. Some of the solutions, such as fare integration are extremely expensive. Getting this right and really thinking about network integration will take a lot of staff time, at a time when staff are struggling to address other pandemic issues. Is this the right moment? I want to acknowledge all the amazing work of our staff already. It seems that the best path is to build on the work that is already being done by the operators with a more targeted approach that recognizes some of the nuances. Think of that coordination as the starting point.

**Caltrain** - wanted to echo the last point I've been thinking of how fragile the transit systems are right now. Making progress on these issues would be easier in normal times. This is a difficult environment to make change, not to say we shouldn't try but we must get new funding if we are to have these new requirements. The transit agencies are struggling to survive. That has to be their top priority.

**MTC Commissioner Papan**— Agreed coordination is the most important thing and probably the easiest thing that you've shown us you can do, and we hope that that continues. I don't see anyone hearing from the airports. Hopefully, they will come into the discussion.

**Chair Spering**— The highest priority is "recovery", and we are very concerned about funding. MTC is working on infrastructure projects to speed up buses. We want to protect jobs and ensure the agencies can protect their workforce. When I used the word dysfunctional, I wasn't referring to any particular agency. But we hear from riders that aren't notified about routes being discontinued. This is the beginning of a long process. We're not going to do this without the large operators cooperating and working together. I hope that we are looking at added value. Nobody is looking at taking over your system. But there are going to be future funding sources and the people that support these measures have made it clear that without change, don't count on their support. The cooperation of the GMs is a foundation we can build on that we haven't seen for some time. What is the infrastructure that can support and enhance what you do? Please continue to give us your feedback. Our goal is to help you recover your riders and to do it in an efficient way and if we can do that with a transit network manager, that's the goal.

**Therese McMillan, MTC** – Noted the observation about the importance of data to inform decision-making is extremely important. One of the very critical things is knowing who has come back? We need to dive deeper to find out where we are today and how that information can help us particularly is regarding our most vulnerable riders. Equity for those who most need our systems has got to be a front facing item. Thank you for your candor and I'm looking forward to working with my peers.

**Kinsey, MTC Consultant** – We are working closely with the GMs and operator staff to make sure we are clear that we have identified the problem. We want to make sure that the types of responsibilities are ones that will be useful in a network manager. As a task force, we are going to be relying on more discussion with all the task force members, we are going to be relying upon the wisdom of the task force and a consultant. We need to have a business case that demonstrates any approach is economically viable. In response to concern that this is the wrong time, as the chair has stated, this is also an opportunity.

**BART** – Let us know the best ways to engage in this. If there are going to be other opportunities like this, let us know, but if there are other mechanisms, please advise us.

**Chair Sprong, MTC** - Noted we will likely need to have another meeting similar to this one as we develop the ideas.

**Public comment –**

- Adina Levin – Friends of Caltrain and Transit Justice Coalition in San Mateo County – noted having worked on Measure RR with grass roots coalition to get the tax measure passed, couldn't agree more with the concern about unfunded mandates. There needs to be funding for anything that costs money, but voters want a seamless system. Having planning in place for seamlessness will help win support for a future measure.
- Roland LeBrun – Everyone agrees there is a problem, but nobody agrees on the solution and the "show me the money" question is well understood. As far as I can see, this is not the time to rock a bunch of leaky boats. Moving forward would be to start with the top of the food chain, BART, Caltrain, Capitol Corridor & ACE and make those work better with everyone else watching and then move forward. I strongly discourage you from forcing legislation.
- Rich Hedges – this was a very good meeting. I'm so happy everyone put their issues on the table. I think one of the most important issues is wayfinding. I travel throughout the region. I'm blessed with convenient bus service on Samtrans that goes to Caltrain, but I have to carry 3 transit maps with me for the larger systems. For the person just starting to ride they are overwhelmed. A system manager can help rationalize the system.



# Strategic Homeless Action Plan

BART Board of Directors

February 26, 2021

# Presentation Overview

1. A Region in Crisis During the Pandemic
2. UCLA Transit & Homelessness Report
3. Regional Impact Council's Regional Action Plan
4. BART Strategic Homeless Action Plan
5. Next Steps
6. Questions

# A Region in Crisis During the Pandemic

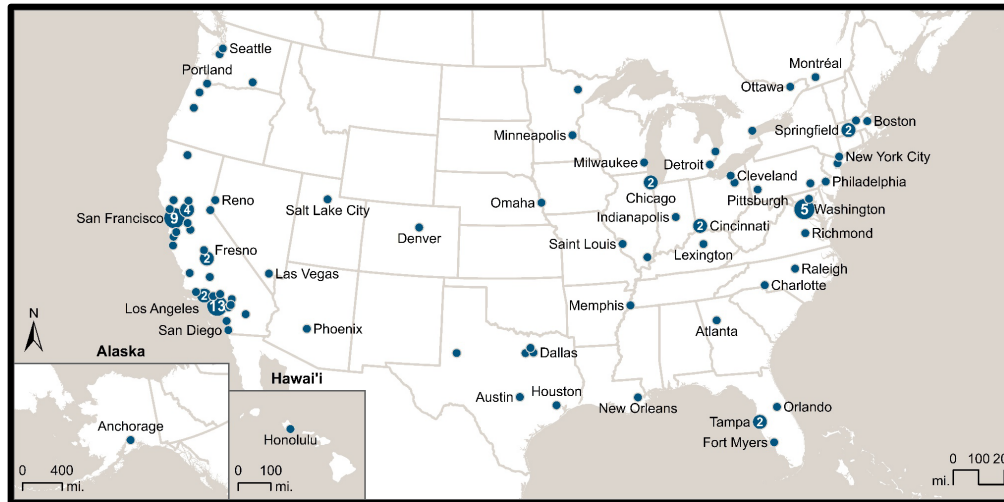
- Impacts in the nine-county Bay Area
  - 35K unhoused
  - Many on the verge of becoming homeless due to impacts from pandemic
  - Extremely low income (ELI) and Black Indigenous People of Color (BIPOC) disproportionately affected
  - ~ \$2B spent on healthcare, criminal justice & social services in Santa Clara County
  - Expected reduced tax revenues that may lead to less services and financial assistance
  - Shelters closed during pandemic with many in hotel rooms and even more on public properties
- State, counties and cities are prioritizing housing for unhoused and keeping people in homes
- Unclear how much funding for services, outreach, programs, treatment are available



# Homelessness in Transit Environments

## UCLA December 2020 Report

- 115 major transit operators in US & Canada
- 142 individual survey responses



### Key survey responses

- 85% of agencies view homelessness as a challenge
- 86% receive complaints about unhoused riders
- 60% say unhoused riders creates negative effect on ridership which has increased during the pandemic.
- CA operators are especially impacted

### Key issues:

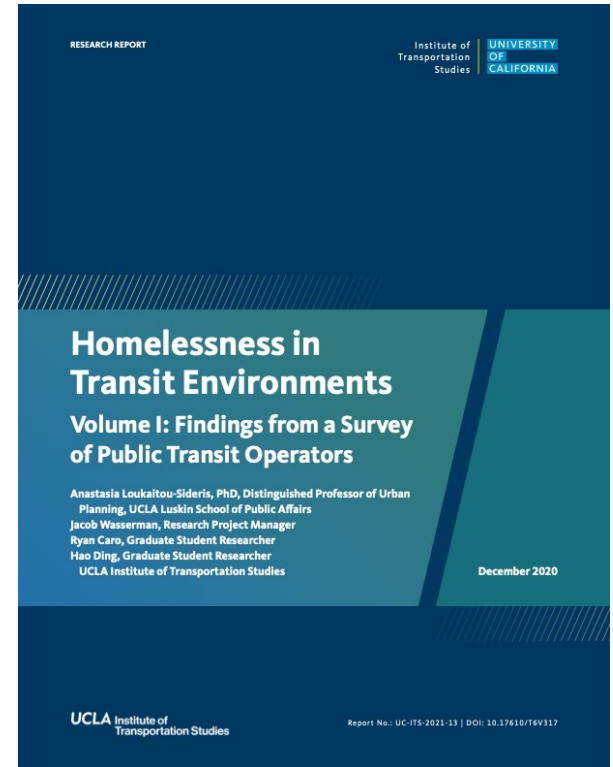
- Other riders' concerns about unhoused individuals
- Lack of funding to address transit homelessness
- Lack of support from city, county, or state governments
- Unclear or undeveloped policies on how to address homelessness in transit settings



# Homelessness in Transit Environments

## UCLA December 2020 Report Recommendations

- Need for better data
- Create and expand on social services partnerships
- Lobby legislators and policymakers
- Define success to include wellbeing of unhoused riders
- Learn from best practices
  - UCLA Report to be updated in 2021.  
(<https://escholarship.org/uc/item/55d481p8>)



# Regional Impact Council (RIC)

- Formed in 2020 to develop regional strategies on rapid responses to:
  - The unsheltered homelessness crisis
  - On structural & systems changes necessary to disrupt homelessness permanently
  - Provide economic & social mobility for extremely low income (ELI) Bay Area residents
- Comprised of Bay Area leaders & staff from the world of public sector, private sector, affordable housing, homeless services, non-profits & transit (BART)
- Focus on regional thinking & coordination
- Framework: House, stabilize & thrive
- 18-month effort



# RIC - Eight Strategic Priorities

## Housing

1. Secure Shelter in Place (SIP) housing locations
2. Streamline state funds and applications for housing & homeless services
3. Prioritize ELI for housing resources
4. Extend covenants of affordability to preserve affordable housing supply & fund ELI tenancy
5. Extend eviction moratorium
6. Provide income-targeted rental assistance to those impacted by COVID-19

## Stabilization & Prevention

7. Accelerate cash payments to people impacted by COVID-19
8. Accelerate targeted, data-informed regional prevention model



# RIC – Call to Action

## Address the unsheltered crisis

- Accelerate work to house 30% in 2021 & 75% by 2024 by existing systems and investing in 1-2-4 flow: For each **1** housing unit, fund **2** housing solutions and **4** preventative interventions.

## Operationalize this work

- Total five-year cost of sheltering 75% of unhoused estimated at \$6.5B with \$1.6B needed in 2021. Costs include existing resources but also requires new resources.

## Lead with racial equity

- Close racial disparities with support from State, counties & private & philanthropic partners.

## Call for Federal partnership

- Expand Federal funding & partnership with call to Biden-Harris Admin to act within first 100 days for financial assistance with emergency rental & permanent housing.

## Priorities for Implementation

- Identified eight priorities to focus on housing, stabilization & prevention.



# BART Strategic Homeless Action Plan

## Intent

- Develop Strategic Document + Action Items
- Summarize current efforts, identify and prioritize new initiatives for delivery
- Address homelessness, cleanliness, substance abuse, mental health, housing, etc. using Customer Satisfaction Survey results & other data points
- Communicate to and coordinate with policymakers, decision-makers, social service partners and stakeholders (riders, employees)
- Secure resources and funding

## Process and Timeline

- Led by new Senior Manager of Social Services Partnerships
- Aim to complete and update at future Board Workshops
- Fully engage internal and external stakeholders

# BART Strategic Homeless Action Plan

## Top six action items

1. Regularly engage and advocate at all levels of government
2. Develop public/private partnerships
3. Create statewide transit advocacy coalition
  - January 21<sup>st</sup> joint GM letter to state assembly requesting more support and resources (BART, LA Metro, Sac RTD, SamTrans, AC Transit, Capitol Corridor)
  - SFMTA to follow
4. Integrate and coordinate with similar BART priorities progressive policing & “Be The Change” recommendations, TOD Work Plan, etc.
5. Develop performance measures, and collect and analyze data
6. Continue to follow & incorporate relevant best practices from all over



# BART Strategic Homeless Action Plan

## Internal and External Coordination and Partnerships



# BART Strategic Homeless Action Plan

## 2020 Data & Metrics (Quality of Life Program)

### Elevator Attendants (monthly avg @ Civic Center)

- Users = 39,243
- Disabled = 3,424
- Mask wearers = 9,494
- Turn away = 158
- Needles = 1
- Human waste = 1

### Pit Stops Counts (BART customers only)

- Powell St. = 2,078
- 16<sup>th</sup> St./Capp = 2,679
- 24<sup>th</sup> St. = 7,809

### SFHOT (Mar-Nov, modified due to COVID-19)

- Total outreach attempts = 2,809
- Total accepted services = 2,345
- Total declined services = 464
- Total medical services referral = 1,031
- Total distribution of masks, kits, hand sanitizer, water, food = 2,238

### Contra Costa CORE (Jan-Dec)

- Total contacts made = 714
- CARE Center Coordination = 1,555
- Healthcare coordination = 27
- Shelter bed coordination = 21
- Warming Center coordination = 570

# BART Strategic Homeless Action Plan

## Data & Metrics (Measuring Success) for Progressive Policing

Measure efficacy of program with monthly sets of specific data points

### Short-Term Metrics

- Positive engagements
- Rapport building
- Provide information
- Follow up for multiple contact individuals

### Long-Term Metrics

- Acceptance of services
- Temporary housing
- Permanent housing
- Drug/alcohol programs
- Conservatorship
- Reuniting with family or care givers

# BART Strategic Homeless Action Plan

## Data & Metrics (Measuring Success) for Progressive Policing

Metrics for our Community Outreach Team Specialists

### Monthly Statistics

- Direct contact/ engagement
- Referrals/ service connected
- Refusal of services

### Service Referral Detail

- Unsheltered/ unhoused
- Mental health
- Substance use
- Medical

### Level of Engagement

- New case
- Ongoing case management
- Case resolved
- Family reunification

Based on CIT Outreach & Case Management best practice approaches & measurable outcomes

# BART Strategic Homeless Action Plan



# Next Steps

- Invite All Home to present to the BART Board soon on RIC Regional Action Plan & to seek Board endorsement
- Complete hiring of new Senior Manager of Social Services Partnership & launch Strategic Homeless Action Plan
- Complete hiring for Progressive Policing Program & fully deploy teams into stations & on trains
- Receive input to help inform FY22 Quality of Life Program Budget



# Board Discussion



BART  
**ba**



San Francisco Bay Area Rapid Transit District

# ▶ Board Workshop 2021



# Board Workshop Summary

February 26, 2021

# General Themes

- BART should continue to be a strong regional leader
- BART is central to the region's recovery
  - Support return to work with transit service
  - Contribute to regional jobs and economic activity through capital infrastructure investment
- Partnerships are essential
  - BART should continue developing partnerships to address homelessness
  - Partnering with other transit agencies for seamless regional transit
  - Deepen relationships with funding partners
- Innovation, nimbleness and focus necessary to support ridership recovery
  - Service scenario planning key to responding flexibly to possible pandemic recovery futures
  - Adapt to changing land use and travel patterns
  - Improve connections to other transit
  - Communicate with riders about benefits of riding BART
  - Ensure continued reliability
  - Address customer safety concerns



# General Themes

- Ridership recovery depends on widespread vaccinations and herd immunity
- General support for regionally coordinated transit
  - Be ambitious and keep an open mind
  - Ensure benefits to workers and riders
  - Advocate for funding needs
- Homelessness
  - Addressing this issue is critical for recovering BART ridership
  - Take to “next level” on advocacy and partnership (at all levels)
  - Metrics are important

# Fiscal Stability: Action Items

- Service Restoration
  - Scenarios
  - Decision points (like ridership % targets) for adjusting service
- Robust and regular presentations before budget adoption
  - Scenarios for revenues and expenses (linked to service)
  - Look at multiple fiscal years
- Detailed analysis of DRIP
  - Breakdown by executive office
  - Positions to fill
  - Net loss of positions and savings to District

# Funding Advocacy: Action Items

- Update on Link 21
  - Board update scheduled for March 11
  - Strategy around joint funding advocacy for railroad dollars
  - Creating a megaregional buy-in on this generational project
  - Public private engagement
- Advocacy Strategy
  - Develop plan for strategic, coordinated Board engagement
  - Next legislative update and bills for consideration – March 25
  - Refine and communicate infrastructure stimulus capital project prioritization approach
  - Develop collaborative strategy with peers to influence policy-makers to amplify transit focus in funding structure
- SRTP/CIP update

# Regional Transit Coordination & Transit Network Management: Action Items

- Continue to lead, keep conversations going beyond the Blue Ribbon Task Force, which ends in June
- Advocate for and participate in a strong Business Case
  - Deep dive into financial implications
- Provide monthly updates to the Board
  - 2nd meeting monthly
- Update on Clipper 2
  - Projected for April
- Identify early partnerships with other supportive transit agencies
- Send the revised problem statement when available from MTC
- Continue to coordinate with other agencies on return to transit marketing and promotions

# Strategic Homeless Action Plan: Action Items

- Hire new Senior Manager of Social Service Partnership
- Develop Strategic Homeless Action Plan
- Bring Regional Impact Council (RIC) to Board this Spring
- Director Engagement: to advocate for more resources and support
- Identify savings to County for assisting BART (i.e., Contra Costa) to “make the case” on outreach partnerships with other counties
- Bring to Board discussion on temporary land use options

# Workshop Evaluation

- Please go to: [https://bart.az1.qualtrics.com/jfe/form/SV\\_bBBa0cicwxNa9pQ](https://bart.az1.qualtrics.com/jfe/form/SV_bBBa0cicwxNa9pQ)
- Provide your thoughts on the 2021 Board Workshop by Tuesday March 2<sup>nd</sup>, 2021



