Update on Regional Transit Coordination

November 17, 2022

Presentation Overview

Metropolitan Transportation Commission (MTC) Blue Ribbon Transit Recovery Task Force Next Steps

1. Regional Network Management Business Case - Update

2. Transformation Action Plan
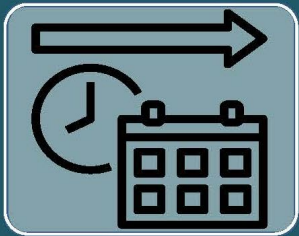   - Overview
   - Action Plan Highlight: Accessibility

MTC's Regional Network Management (RNM) Business Case Evaluation

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)

MTC's RNM Framework

Six Functional Areas:
- Wayfinding
- Accessibility
- Rail Network Management
- Fare Integration Policy
- Bus Transit Priority
- Network Planning

The Regional Network Management Framework

Benefits of the RNM Framework

Financial, Time, & Legal Constraints

Mission & Vision

+

Functional Areas

Accountabilities	Responsibilities

+

Operating Model

Governance & Decision Rights	Core Processes
Technology & Tools	Behaviors & Culture
Roles & Structures	Metrics & Incentives

Customer Benefits   *Network Mgmt. Benefits*   *Other Public Benefits*

The **mission** (the RNM's purpose) and **vision** (what the RNM hopes to accomplish) serve as guiding principles for the Functional Areas and Operating Model within the RNM

The **Accountabilities** and **Responsibilities** define what activities within each functional area for which the RNM is responsible (vs. the Operators or MTC)

The **Operating Model** defines *how* the RNM will deliver its Accountabilities and Responsibilities

The **Financial, Time, & Legal Constraints** place boundaries on the Mission, Vision, Functional Areas, and Operating Model for the RNM

MTC's Assessment Identified Challenges for which the RNM Operating Model will be focused to Address

Governance and Decision Rights
- Need to establish a single entity to coordinate / drive regional decision making
- Need to place existing / potential customers at the forefront of decision making
- Need to provide then RNM with clear policy purpose and hold the RNM accountable for delivery
- Need to establish common regional objectives / vision

Metrics and Incentives
- Need to establish standardized regional metrics
- Need to give the RNM authority / incentivize participation in regional activities (e.g., through new approaches to funding)
- Need to be able to obtain commitment from the participants in the RNM

Core Processes
- Need to improve planning / coordination processes
- Need to provide a simpler interface for key stakeholders / riders to provide input or coordinate activities
- Need to enable faster and more inclusive decision-making processes

Roles and Structures
- Need to leverage existing resource capabilities and capacities in the short/near term, but enable ability to scale over the long term
- Need to provide technical and communications capacity to support Operators
- Need to include a broad range of stakeholders

Technology and Tools
- Need to establish regional tools (e.g., regional travel market/demand model)
- Need to establish common language for data collection and reporting
- Need to enable centralized / shared procurement, where beneficial / possible

Behaviors and Culture
- Need to promote collaboration and trust between policy funding bodies and implementation bodies
- Need to ensure cross-integration of regional priorities
- Need to find right leader to drive the growth and success of the RNM and regional objectives

4

MTC's Identified Components to Deliver on Three Elements

Regional Visioning Element

MTC: Leverage existing regional purview and planning capabilities to help set the regional vision for transit in the Bay Area and drive the direction of the RNM

Steering Element

RNM Executive Board: Board comprised GM-level Operator and MTC representatives who understand transit operations and can represent the interests of their stakeholders, make critical decisions on regional polices, and provide leadership

"Voice of the Customer" Advisory Function: Group of stakeholders who represent the customer and can help inform decision-making with the customer in mind
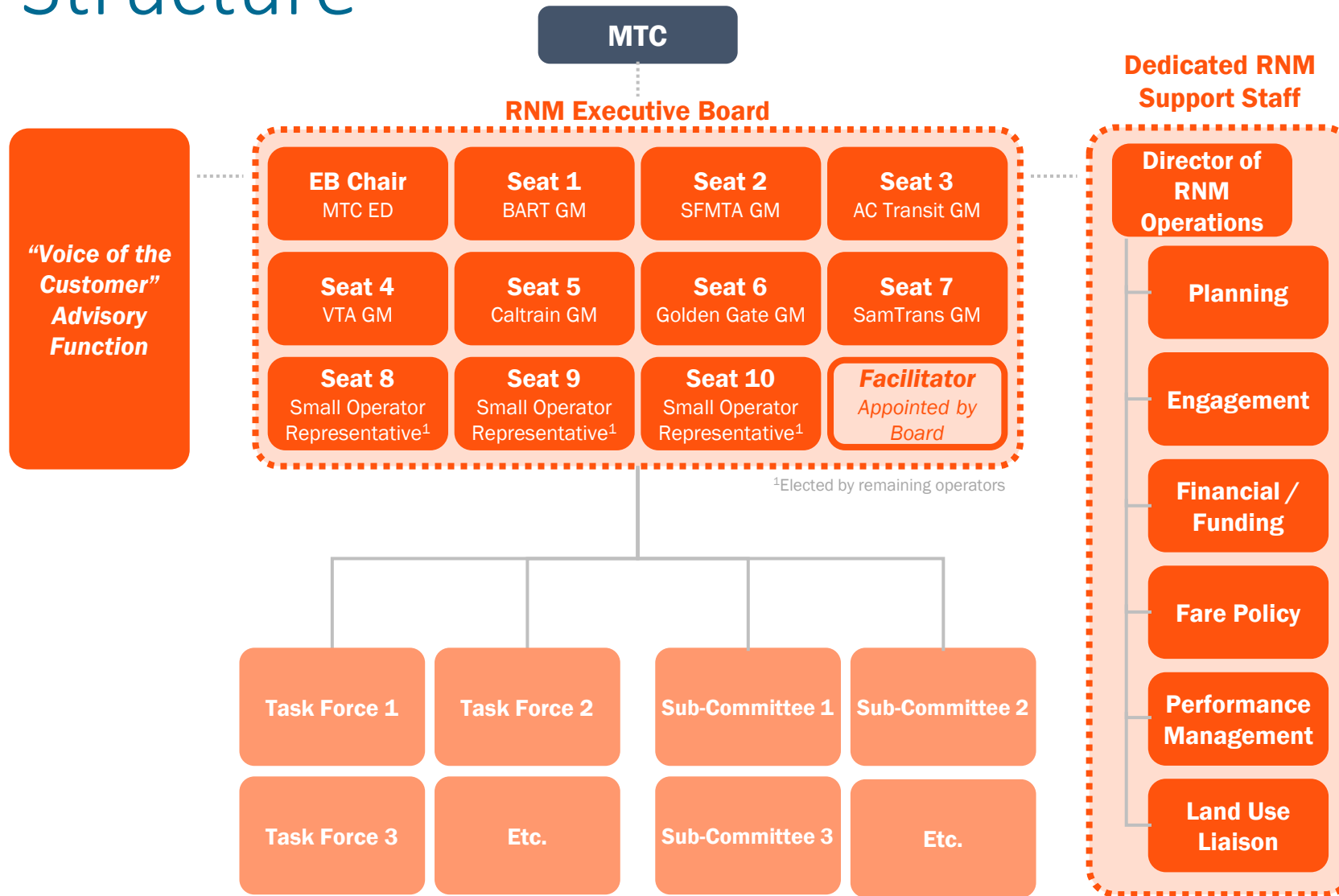
Administrative / Operational Element

Task Forces: *Temporary* groups comprised a broad range of representatives, including Operators, stakeholders, and subject matter experts, that will help complete analysis and develop policy recommendations / options for *targeted* topics

Sub-Committees: *Longer-term* groups comprised a broad range of representatives, including Operators, stakeholders, and subject matter experts, that will help complete analysis and develop policy recommendations / options for *ongoing* topics

Dedicated RNM Support Staff: Group of dedicated staff (potential opportunity for seconded staff as well) with a broad range of capabilities and expertise to support the operations and analysis of the RNM

MTC's Proposed Preliminary Short / Near-Term RNM Structure

MTC

RNM Executive Board

"Voice of the Customer" Advisory Function

EB Chair MTC ED	Seat 1 BART GM	Seat 2 SFMTA GM	Seat 3 AC Transit GM
Seat 4 VTA GM	Seat 5 Caltrain GM	Seat 6 Golden Gate GM	Seat 7 SamTrans GM
Seat 8 Small Operator Representative[1]	Seat 9 Small Operator Representative[1]	Seat 10 Small Operator Representative[1]	*Facilitator Appointed by Board*

[1]Elected by remaining operators

Dedicated RNM Support Staff

Director of RNM Operations
- Planning
- Engagement
- Financial / Funding
- Fare Policy
- Performance Management
- Land Use Liaison

Task Force 1 — Task Force 2 — Sub-Committee 1 — Sub-Committee 2

Task Force 3 — Etc. — Sub-Committee 3 — Etc.

✓ **Customer Focused:**
- Enables highly inclusive decision making to bring a broad range of perspectives
- Dedicated "Voice of the Customer" element to keep the customer at the forefront of decision making
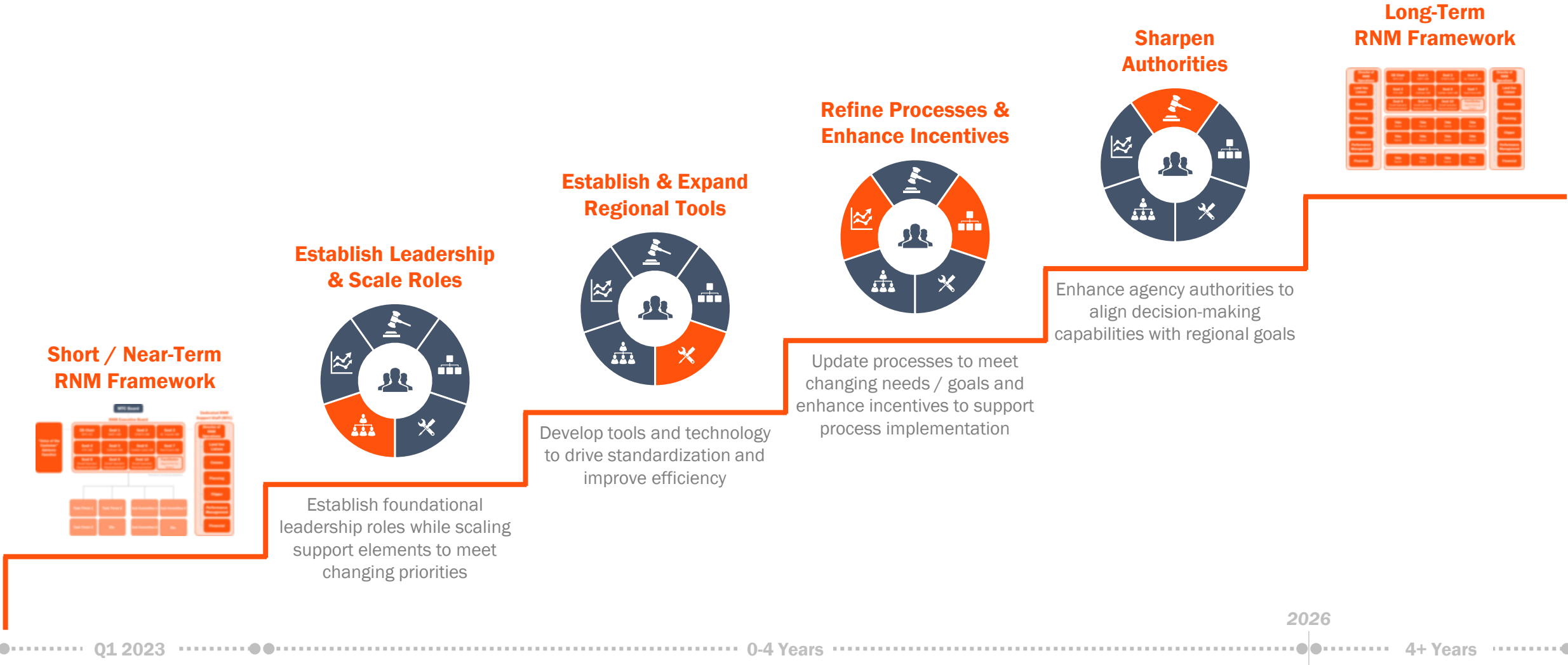
✓ **Structured for Scale:**
- Task Forces and Sub-Committees can be added or subtracted as additional Functional Areas are added or regional priorities shift
- Team of Dedicated Support Staff can grow over time to provide needed capacity to Operators
- Joint teams, with potential opportunities for seconded staff, enable high quality proposals to reach the Executive Board, 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
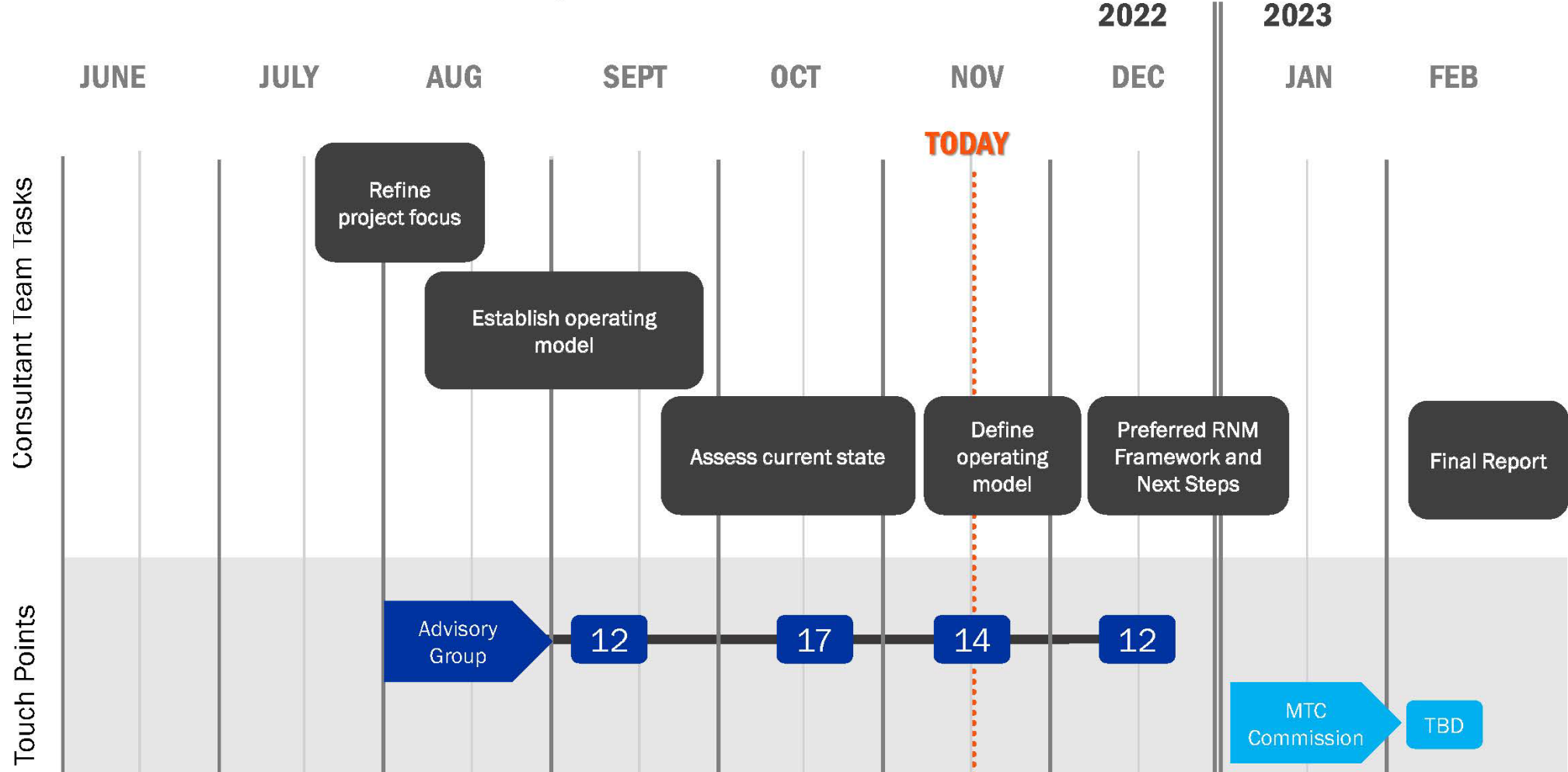- Feasible within current legislative constraints

MTC's Approach: How the Operating Model Framework will Drive Long-Term Evolution of the RNM Framework

Long-Term RNM Framework

Sharpen Authorities

Enhance agency authorities to align decision-making capabilities with regional goals

Refine Processes & Enhance Incentives

Update processes to meet changing needs / goals and enhance incentives to support process implementation

Establish & Expand Regional Tools

Develop tools and technology to drive standardization and improve efficiency

Establish Leadership & Scale Roles

Establish foundational leadership roles while scaling support elements to meet changing priorities

Short / Near-Term RNM Framework

Q1 2023

0-4 Years

2026

4+ Years

Note: Illustrative

MTC's Network Management Business Case Schedule

MTC's Transit Transformation Action Plan & Ongoing Regional Transit Coordination

- MTC's Transit Transformation Action Plan identifies 27 near-term actions related to five key outcomes

- Progress on all five outcomes in partnership with MTC

- Weekly coordination by all operators to support progress on the Action Plan and share best practices
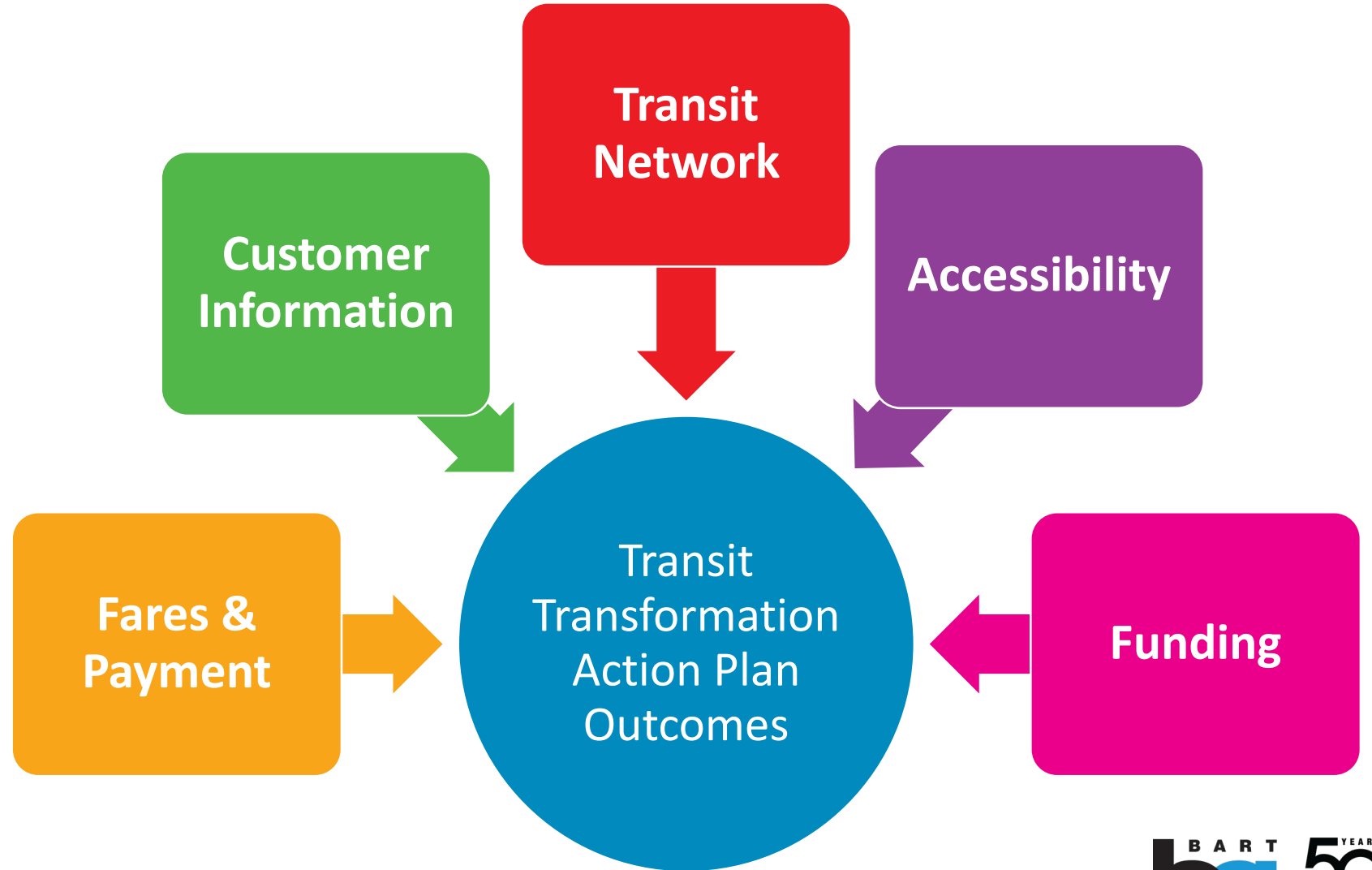
Transit Transformation Action Plan Highlight: Accessibility Actions

#21 Designate a Mobility Manager

- Designate a Mobility Manager to coordinate rides and function as a liaison between transit agencies in each county.

#22 One-seat Paratransit Ride Pilots

- Fund subregional one-seat paratransit ride pilots and develop cost-sharing policies for cross jurisdictional trips

#23 Clipper Next Generation Work

- Integration of ADA paratransit services on Clipper Next Generation. Work is ongoing and is led by Clipper Staff

#24 Recommend Reforms

- Identify key paratransit challenges and recommend reforms through the Coordinated Plan update

#25 Standardize Eligibility

- Adopt standardized eligibility practices for programs that benefit people with disabilities (ADA paratransit)

Transit Transformation Action Plan Highlight: Accessibility & BART's Regional Paratransit Approach

MTC initiatives to be completed by Winter 2024

- Working closely with MTC on these initiatives

BART's Regional Approach to Paratransit

- 25 years of partnership with AC Transit
- Operates a contactless fare payment system
- Pays for a coordinator to plan regional trips
- Offers certification training for other agencies