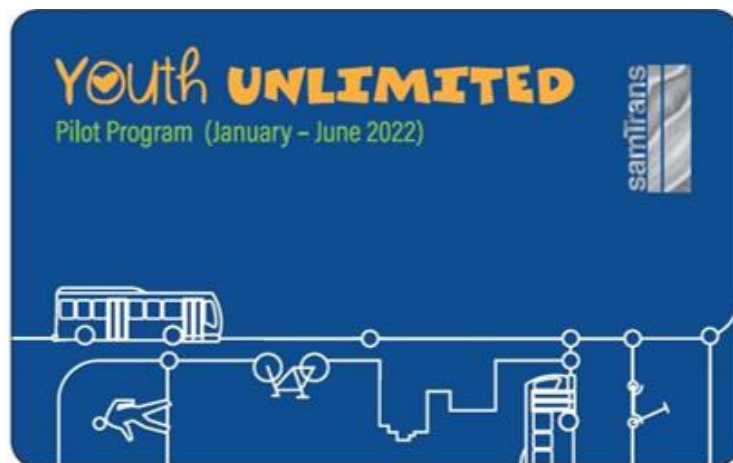


# SamTrans Youth Unlimited Pilot Evaluation Report

July 2022



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## Overview of Pilot

The Youth Unlimited pilot program provides free SamTrans bus fares for Socioeconomically Disadvantaged (SED) students. As defined by the California Department of Education, SED students include students eligible for the Free and Reduced-Price Meal program; students experiencing homelessness; foster-youth; migrant students; or students whose parents did not graduate high school.<sup>1</sup> As of 2022, there are approximately 30,000 SED students in San Mateo County. The pilot program's goals are to reduce transportation costs for low-income families, attract new and more frequent riders, and understand the potential operational impacts of providing free fares to some or all youth riders.

SamTrans launched the pilot program on January 1, 2022, in partnership with the County of San Mateo Office of Education. The pilot was originally planned for a duration of six months; however, it was extended for an additional two months (through August 2022) to cover the summer break. Due to the success of the pilot program in achieving or exceeding the established evaluation metrics, staff recommends implementing the Youth Unlimited as a permanent program for SED students. This report summarizes the process of developing and launching the pilot program, the performance of the pilot program to-date, and recommendations for next steps.

## Background

At the November 2021 SamTrans Board of Directors meeting, the Board directed staff to research the feasibility of a free fares pilot for all or some youth. Staff reached out to the County of San Mateo Office of Education to discuss eligibility requirements and pass distribution logistics. It was determined that the pilot should be offered to Socioeconomically Disadvantaged (SED) students. This eligibility aligned with an existing SamTrans vendor program, in place since 1998, that offers discounted youth monthly passes to schools for students who qualify for the Free and Reduced-Price Meal Program. Fifteen schools/school districts and two social service agencies participated in the vendor program in 2020. The pilot program builds on the existing relationships with schools and expands the existing vendor program to offer free passes to all SED students, including those eligible for free and reduced meals.

The proposed Youth Unlimited pilot program was presented to the Board of Directors at their January 5, 2022, meeting. The presentation outlined the pilot's goals, purpose, and evaluation metrics. Since then, the Board has received monthly updates on Youth Unlimited ridership via the Community Relations Committee's "Monthly Performance Report" agenda item. An overview of the following report was provided to the Board of Directors at the June 1, 2022, meeting as an informational item. Board members expressed support for the pilot program.

## Pilot Development and Internal Support

The Youth Unlimited pilot program was led by SamTrans Planning and Fare Operations staff and supported by an internal task force. The task force included representatives from several SamTrans departments including Operations Planning, Market Research and Development, Finance, Communications, Strategic Planning, and the Office of Civil Rights (Title VI). The task force met regularly

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<sup>1</sup> See California Department of Education's "California School Dashboard Technical Guide," page 39, accessed at <https://www.cde.ca.gov/ta/ac/cm/documents/dashboardguide19.pdf> on 11/22/2021.

to establish pilot program roles and responsibilities, support program development and evaluation, and review progress.

SamTrans worked with the Office of Education to acquire contacts and gauge interest from every public school district and charter school in San Mateo County. The Palo Alto Unified School District was also included because it serves a small group of San Mateo County residents. A total of 32 school districts and charter schools signed up to participate in the pilot. Each participating school district and charter school was asked to sign a Memorandum of Understanding (MOU) with SamTrans outlining the responsibilities of each party for the pilot program. The responsibilities are summarized in the table below.

SamTrans' Role	School Districts' / Schools' Role
<ul style="list-style-type: none"><li>• Distribute Youth Unlimited passes to school districts based on requested number of passes and student population eligibility</li><li>• Develop survey and distribute to school districts mid-pilot</li></ul>	<ul style="list-style-type: none"><li>• Announce the pilot to eligible students and their parents/guardians</li><li>• Distribute passes to eligible students and administer replacement passes as needed</li><li>• Track the number of passes distributed to students and provide this information to SamTrans at mid-semester and upon completion of the pilot program</li><li>• Distribute survey to participating students or their parents/guardians</li></ul>

As part of the pilot development process, staff also prepared supporting documents for schools and participants. This included developing content for the pilot program webpage and preparing a handout for schools with an overview of the pilot program and frequently asked questions.

## Evaluation

Several methods were used to evaluate the success of the pilot program against an established set of performance metrics. This included a participant survey, internal data collection and analysis, and a virtual multilingual community meeting. The evaluation methods informed the success of the performance metrics in addition to providing more detailed insights. A summary of the performance metrics and each evaluation method is provided below.

### Performance Metrics

Prior to the pilot program launch, the task force developed a set of performance metrics to measure pilot performance and serve as indicators for each goal. The pilot program goals are:

1. Reduce transportation costs for low-income families.
2. Attract new or more frequent riders and improve mobility options for low-income families.
3. Understand the potential operational impacts of providing free fares to some or all youth.

The project team used insights gathered from the participant survey and internal data analysis (ridership, farebox revenue, school route crowding) to evaluate the results of the pilot program using the performance metrics. As shown in the table below, the pilot program was able to achieve all seven of the performance metrics.

Performance Metric	Goal #	Achieved?	Results
Distribute >5,000 passes	1, 2	✓	Over 9,600 distributed
Increase in new riders	1, 2	✓	25% of respondents were not riding SamTrans prior to receiving the pass.
Increase in trip frequency of participants	2	✓	62% of respondents indicated that they are currently riding more than before receiving the pass
Improve school attendance	2	✓	28% of survey respondents indicated that it improved their school attendance
Crowding on school routes not to exceed 150%	3	✓	No capacity issues on school routes during pilot
Identify impact on farebox revenue	3	✓	Estimated total farebox annual revenue impact is \$300k-\$450k.
Provide economic benefit to participants and their families	1,2	✓	39% of respondents said the pass helped them save money

### Participant Survey Results

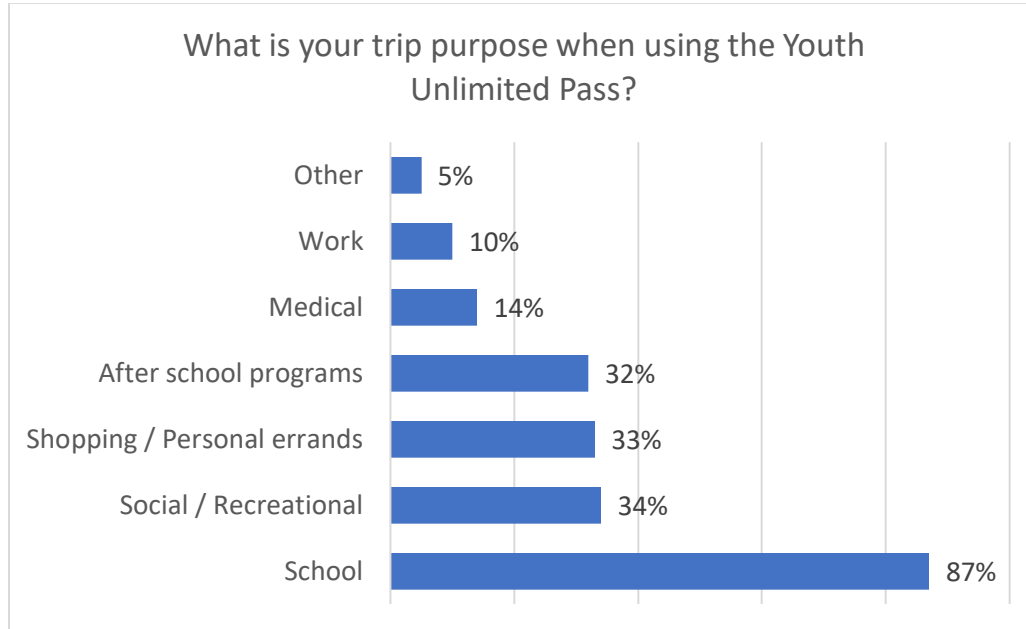
A participant survey was distributed in early April 2022 and was completed by over 300 participating students or their parents/guardians. The purpose of the survey was to better understand how students are using the pass, gather feedback, inform the Title VI analysis, and help SamTrans determine whether to make the pilot program permanent. As outlined in the MOU, schools were responsible for distributing the survey. Key insights from the survey are highlighted below.

#### How the Pass is Being Used

The survey asked participants how they've been using the pass, and how they've benefitted from the pass. Taken together, the survey responses to these two questions show that the Youth Unlimited pass has additional utility beyond just a means of transportation to and from school.

Most survey participants are using the Youth Unlimited Pass to go to school. However, about a third of survey participants are also using the pass to get around for fun (social/recreational), to run errands, and attend after school programs. Fourteen percent used the pass to get to a medical appointment, and 10% used the pass to go to work.

Figure 1. Trip purpose with Youth Unlimited pass



Participants were also asked to select all the ways that the Youth Unlimited Pass has benefited them. Over 80% of survey respondents say the pass has helped them to save money, and almost 60% were able to go to more places. 28% percent of survey respondents say the Youth Unlimited Pass has improved their school attendance, which is one of the performance metrics established at the start of the pilot program.

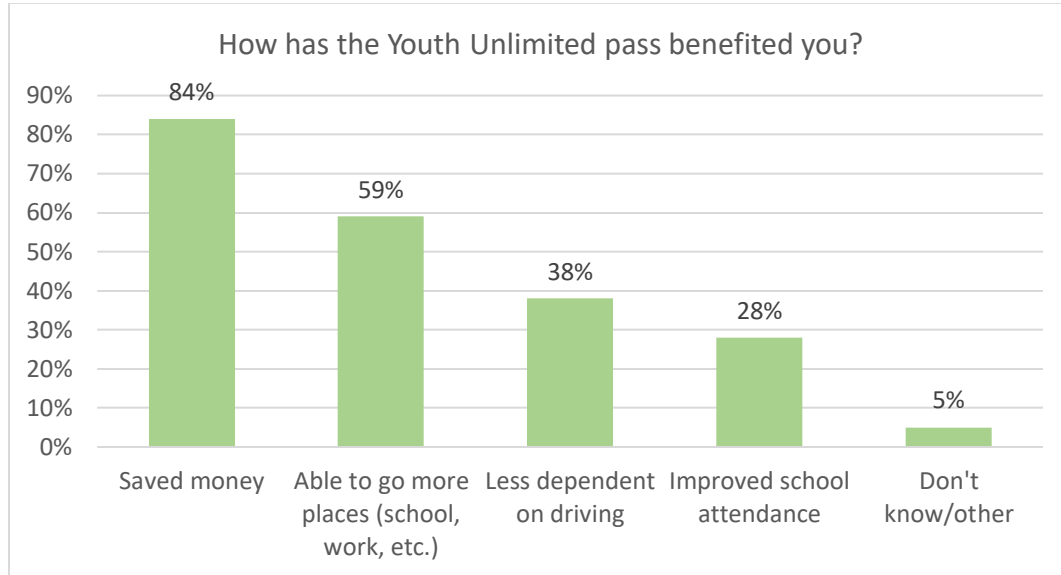
Other ways that the Youth Unlimited Pass benefited participants include:

*"Saved time and energy walking from place to place. It used to take me 30-45 minutes to walk home from school since I did not have a ride."*

*"Less walking which [means that] sometimes I['m] not late to school"*

*"Kids have become more responsible and independent when they know they need to be on time to catch the bus!!!!"*

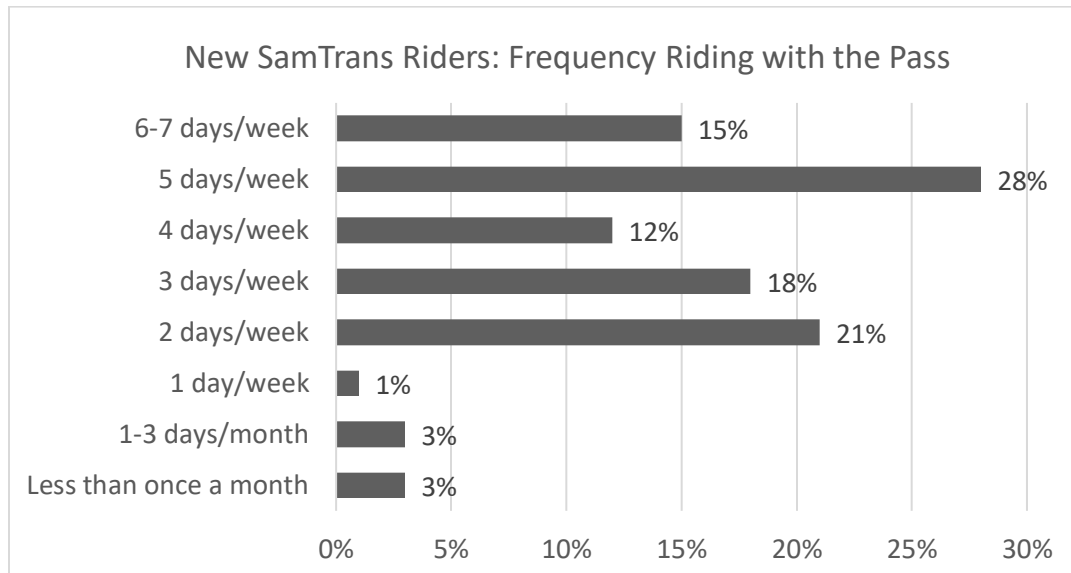
Figure 2. Benefits of Youth Unlimited pass



### Frequency Riding the Bus

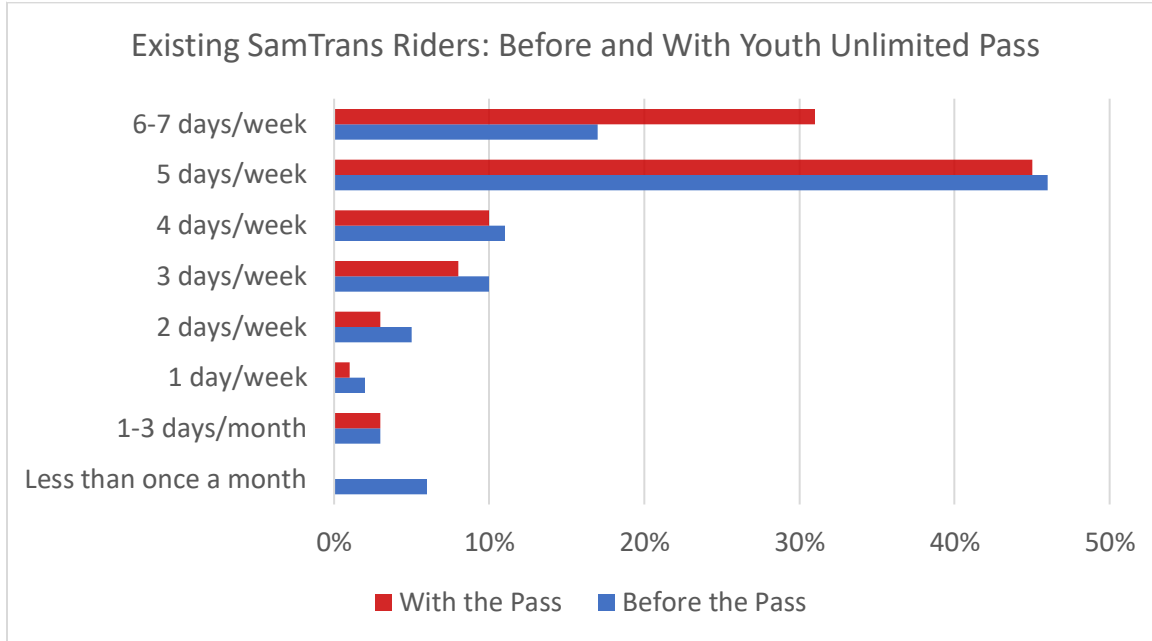
The survey also sought to understand how frequently Youth Unlimited pass holders were riding the bus. Ridership frequency varied for new SamTrans customers. Overall, 25% of survey respondents were not riding SamTrans prior to receiving the Youth Unlimited pass. Of these new riders, 39% are riding the bus an average of 2-3 days a week and 43% are riding an average of 5-7 days a week.

Figure 3. Frequency of new SamTrans riders with Youth Unlimited pass



For existing SamTrans customers, 63% were riding an average of 5-7 days per week prior to receiving the Youth Unlimited Pass. This number increased to 76% with the Youth Unlimited Pass. Overall, 62% of respondents indicated they are currently riding more than before receiving the pass.

Figure 4. Frequency of existing SamTrans riders before and with the Youth Unlimited pass



### Ridership and Financial Analysis

In addition to the survey responses, SamTrans was also able to analyze the pilot using operational data collected through the farebox. The Youth Unlimited pass is administered as a flash pass and when boarding the bus, the student shows the pass to the bus operator and the operator presses a dedicated key on the farebox. The pass is not scanned or tapped like other payment forms, which limits the availability and granularity of data. Nevertheless, through data generated by the farebox key staff can calculate the number of uses by day and by specific route.

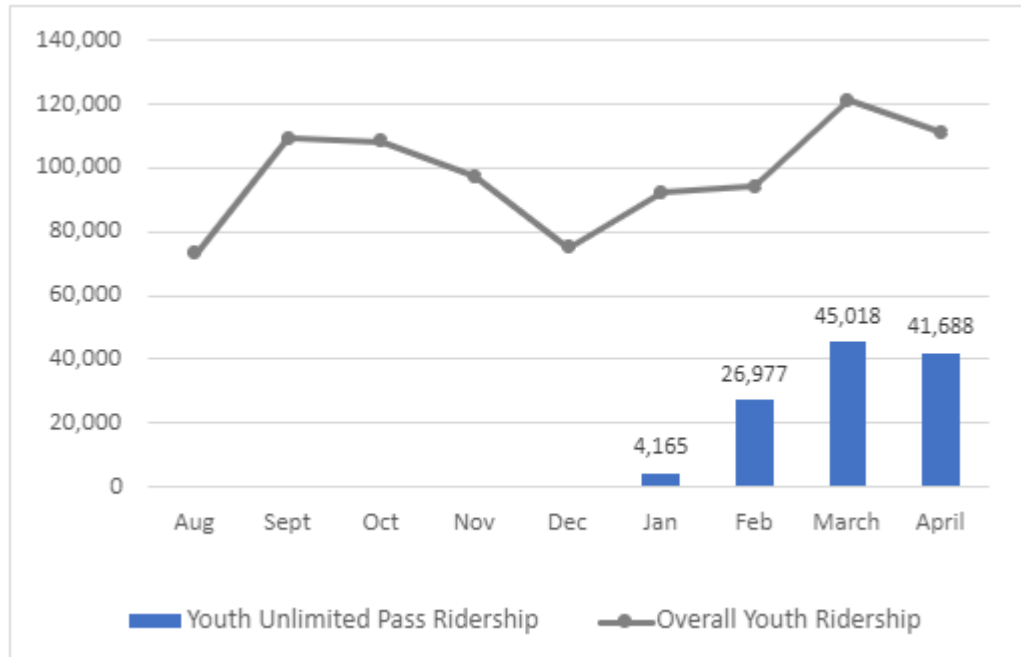
### Ridership

The graph below shows the ridership of the Youth Unlimited pass by month compared to overall SamTrans youth ridership, which includes youth monthly pass and day pass purchases. Although the



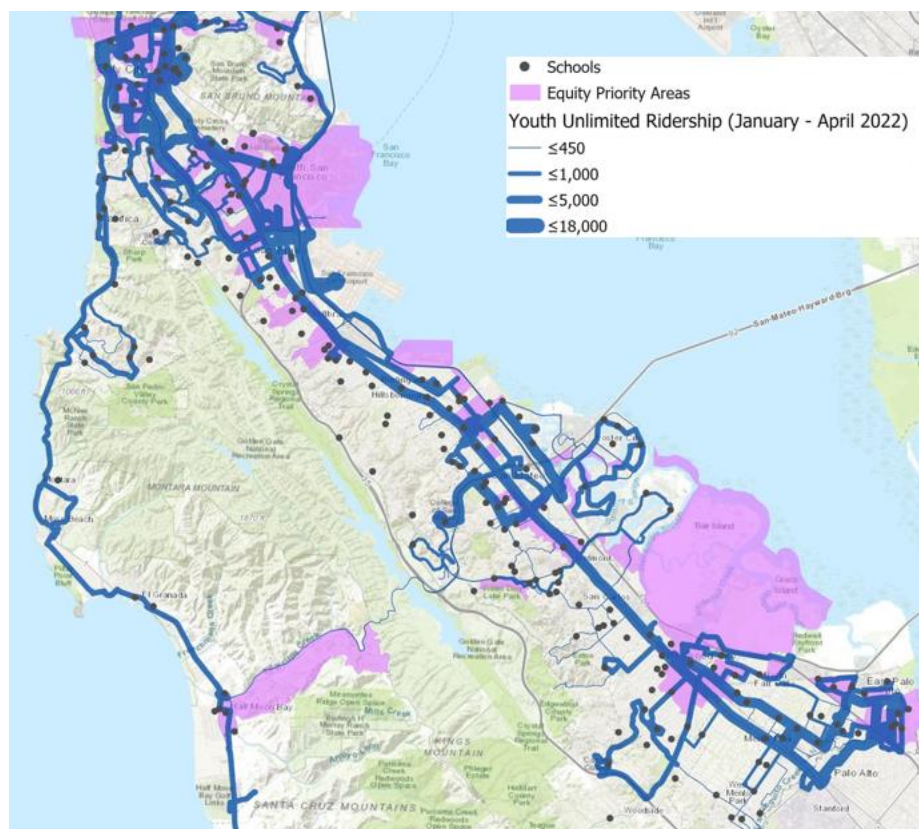
Youth Unlimited ridership took a few months to ramp up, it makes up a significant portion, about 35%, of the overall SamTrans youth ridership from February through April 2022.

*Figure 5. Youth Unlimited ridership and overall youth ridership*



The map below shows the Youth Unlimited ridership by route from January through April 2022. Students are using the pass in all parts of the county, with noticeable concentrations in East Palo Alto, San Mateo, and throughout the northern part of the county. There is significant ridership on all types of routes, not just the school-oriented routes. This supports the pilot’s goal to improve overall mobility for low-income families.

Figure 6. Map of Youth Unlimited Ridership by Route - January through April 2022



### Financial Impact

As with any free fare program, it's important to understand the impact this program will have on the farebox revenue if the pilot becomes permanent. The total farebox revenue loss of a permanent Youth Unlimited program is estimated at \$300,000 to \$450,000 per year. This amount considers lost revenue from the discounted youth monthly pass (also known as the vendor program) which generated approximately \$300,000 in annual revenues. It also factors in the associated farebox revenue loss of riders transitioning from other fare products (such as the youth monthly pass) to Youth Unlimited pass.

### Operational Impact

As SamTrans operates in a resource-constrained environment and providing additional trips or routes to schools is not currently feasible, it was important to understand the impact the pilot program could have on on-board crowding on SamTrans routes serving schools. The SamTrans Service Policy Framework currently dictates an acceptable level of crowding up to 150% of seated capacity. This means the passenger load should not exceed 60 passengers on a 40-foot SamTrans bus, for example.

Staff used ridership data to analyze the crowding levels on school-oriented routes during the pilot program and found that there were no recurring issues of overcrowding during the pilot period. SamTrans will continue to monitor this data point.

Staff also proactively educated bus operators about the new pass product and responded to input from bus operators during the pilot period. Some bus operators reported minor issues with students

presenting their cards via their phones or adults using their child's pass. Staff will continue to take operator input into consideration as the program is refined.

### Public Meeting

SamTrans held a virtual community meeting in Spanish and English on May 24, 2022, at 5:30 p.m. The purpose of the meeting was to share results of the evaluation and receive input on the pilot program. The meeting was published on the project website, advertised on SamTrans social media and a press release was issued encouraging parents, students, and community members to attend. Four people attended the public meeting, with one providing a comment. The speaker expressed support for the program and suggested SamTrans staff attend back-to-school events in the fall to help distribute the passes.

### Title VI Analysis

Federal Transit Administration Circular 4702.1B and District policies require that the SamTrans Board of Directors review and consider approval of the Title VI fare equity analysis of potential impacts to minority and low-income riders. The Title VI analysis for the Youth Unlimited program demonstrates the proposed program will not have a disparate impact or disproportionate burden on minority or low-income passengers, respectively.

### Recommendation and Next Steps

The staff recommendation is to extend Youth Unlimited as a permanent program, based on the pilot achieving or exceeding each of the pre-established evaluation metrics. Staff will bring this recommendation, including an updated fare structure and final Title VI analysis, to the SamTrans Board of Directors for adoption at the July 6, 2022, meeting. If adopted, the pilot would become permanent for the next school year, starting in August 2022.

For a permanent program, staff is planning on transitioning the pass from a flash pass to a magnetic stripe ("magstripe") ticket to collect more granular data on usage. The magstripe pass also provides the students with a pass that is less distinct in appearance since other SamTrans fare products are also issued on magstripe cards. Schools have mentioned that they aim to avoid distinguishing low-income students from other students in any form. There are plans to eventually administer the pass on the regional Clipper card after Clipper 2.0 is launched in late 2023.

Based on the reporting of pass distribution from schools, approximately 9,600 passes were distributed to students out of the 30,000 eligible students countywide. To ensure continued success of the permanent program and increase participation, SamTrans will develop marketing materials, such as flyers and social media messages, for the schools to better advertise the availability of this pass. There are also opportunities for SamTrans staff to attend back-to-school events to help advertise the program and distribute passes.

Staff will continue to monitor the Youth Unlimited ridership as well as the crowding on school routes on a monthly basis. In the future, there may be opportunities to expand the program to a larger subset or all students. Expanding the program will be further studied after at least one year of operating Youth Unlimited as a permanent program with the current eligibility requirements.