



Title VI
Equity Analysis
Way2Go Program Update
July 2021

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SamTrans
Title VI Equity Analysis:
Way2Go Program Update

■ **SUMMARY**

In September 2020, the San Mateo County Transit District (“District”) initiated the SamTrans Way2Go Pass Program Study (Study). Established in 2007, the SamTrans Way2Go Pass program allows residential complexes and businesses (“participants”) to purchase annual unlimited-ride bus passes for all eligible residents or employees (“users”). The Study has proposed changes to the program structure in order to meet the following goals:

- Increase participation in the Way2Go Pass program and overall bus ridership
- Ensure the program pricing structures are equitable for partners and financially-sustainable for the District
- Improve the efficiency and effectiveness of Way2Go Pass implementation and administration

Throughout the Study, Staff engaged and received guidance from stakeholders, including non-profit housing developers, educational institutions, San Mateo County businesses, and peer transit agencies. Based on this input as well as technical and financial analysis, the following changes are proposed to the Way2Go Pass program:

1. Add an additional category for educational institutions, which would allow colleges and K-12 schools to participate in the program
2. Adjust the per-pass price, making the program more affordable and better aligned with the bulk pass programs of peer agencies and the goals of increasing participation
3. Reduce the contract minimum in order to be more inclusive of smaller businesses, housing complexes, and other eligible groups

In order for the District to update the Way2Go program, it must make several changes to its Fare Structure.¹ These changes to the Fare Structure are being considered as part of a single board action that will be heard in August 2021. The changes to the Way2Go Pass Program align with the SamTrans Fare Policy to encourage ridership growth by keeping SamTrans affordable and simple to use.

Title VI of the Civil Rights Act of 1964 (Title VI) prohibits discrimination on the basis of race, color, and national origin in programs and activities receiving federal financial assistance. The District has committed to the Title VI objectives set forth in the Federal Transit Administration (FTA) Circular 4702.1B ensuring that FTA-assisted benefits and related services are made available and are equitably distributed without regard to race, color, or national origin.

¹ The Fare Structure is the legal document that outlines the specific fares for the SamTrans bus system.

As a federal grant recipient, the District is required to maintain and provide to the FTA information on District compliance with the FTA's Title VI regulations. At a minimum, the District must conduct periodic compliance assessments to determine whether its services are provided in a nondiscriminatory manner consistent with the law. Additionally, SamTrans must ensure compliance by evaluating service and fare changes at the planning and programming stages to determine whether those changes have discriminatory impacts, including disparate impacts on minority populations and/or disproportionate burdens on low-income populations. The indices of discrimination that could be monitored for disparate impacts include fare structures that could consistently cause minority-group riders to bear a higher fare burden than the overall riding public.

The changes to the Way2Go Pass program include changes to per-pass pricing and contract minimums that would go into effect in 2022. The program would also be expanded to include educational institutions. This assessment analyzes proposed changes to the Way2Go Pass fare product and any potential impacts on minority and low-income passengers. The analysis, contained in this report, found that the proposed changes do not result in a disparate impact on minority passengers nor a disproportionate burden on low-income passengers.

■ BACKGROUND

SAMTRANS OVERVIEW

The District provides SamTrans fixed-route bus service, as well as complementary ADA and non-ADA paratransit and shuttle services in San Mateo County, California. The 446-mile area also includes routes to San Francisco and Palo Alto. The District's diverse service area contains both dense urban and suburban landscape with residents from an array of different backgrounds. Prior to COVID-19, SamTrans operated approximately 78 routes throughout San Mateo County and San Francisco County. **Attachment 1** is a copy of the SamTrans Service Map.

Established in 2007, the Way2Go Pass program allows residential complexes and businesses ("participants") to purchase annual unlimited-ride bus passes for all eligible residents or employees ("users"). Way2Go Passes are loaded onto Clipper® regional fare payment cards and are valid for a single calendar year for use on Local and Express services. There are currently three non-profit residential properties participating in the program. The Way2Go Pass program generated \$48,625 in 2018, \$67,334 in 2019, and \$62,000 in 2020, for a total of \$177,959 over the past three years. In Fiscal Year 2019, the Way2Go Pass generated approximately 0.5% of the agency's farebox revenue.

■ FARE PROPOSAL

CURRENT FARES

At present, Way2Go Pass program participants must purchase a pass for all eligible users, as defined below:

- Residential complexes: All residents age five years old and older are considered “Way2Go Users.”
- Business: All staff working more than 20 hours per week, excluding temporary employees, interns, contractors and consultants, are considered “Way2Go Users.”

The 2021 Way2Go agreement specifies that employees of residential complexes and temporary employees or contractors of businesses are not eligible for the program.

The annual cost of Way2Go Passes is \$125 per resident or employee (i.e., per user) with a contract minimum of \$12,500, which equates to 100 passes. The cost is prorated if the participant joins the program or adds a user for less than a full year. The initial sign-up fee is paid upfront prior to the Way2Go Pass start date.

PROPOSED FARES

This Fare Equity Analysis analyzes the following proposed fare changes:

1. Add an additional category for educational institutions, which would allow colleges and K-12 schools to participate in the program
2. Adjust the per-pass price, making the program more affordable and better aligned with the bulk pass programs of peer agencies and the goals of increasing participation
3. Reduce the contract minimum, in order to be more inclusive of smaller businesses, housing complexes, and other eligible groups

The proposed pricing changes are reflected in **Table 1**.

Table 1: Current and Proposed Way2Go Pass Pricing and Contract Minimum

	Pricing Category (Annual Price per Pass)			Contract Minimum
	Residential Complex	Educational Institution	Employer	
Current	\$125	Not Eligible	\$125	\$12,500
Proposed	\$40	\$35 per semester*	\$75	\$2,500

*Semesters would be designed to cover the full calendar year (e.g., January through July, and August through December)

Attachment 3 reflects the proposed changes to the SamTrans Fare Structure.

■ SAMTRANS TITLE VI POLICIES

The Federal Transit Administration updated its Title VI of the Civil Rights Act of 1964 guidance in October 2012, through FTA Circular 4702.1B. This guidance requires that the governing authority of each federally assisted public transportation provider adopt three policies including:

- Major Service Change Policy
- Disparate Impact Policy
- Disproportionate Burden Policy

The District adopted its policies based on a number of factors, including existing policies already in use, consultation with other transit agencies, and analysis of impacts of past service and fare change decisions. The District published its policies for public review in January 2013 and conducted significant public outreach to solicit input. Following public engagement, the District revised the policy proposals and the Board of Directors adopted the revised policies at its March 13, 2013 meeting. The adopted policies follow and are included in **Attachment 2**.

MAJOR SERVICE CHANGE POLICY

All major increases or decreases in transit service are subject to a Title VI Equity Analysis, which must be completed and presented for Board consideration prior to Board approval of the subject service change. A major service change is defined as a reduction or increase of 25 percent or more in total vehicle revenue miles in service on any specific route over a one-week period. Certain changes, such as temporary changes lasting less than 12 months, are exempt.

DISPARATE IMPACT POLICY

This policy establishes a threshold for determining whether a given action has a disparate impact on minority populations versus non-minority populations. Per FTA Circular 4702.1B:

Disparate impact refers to a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the recipient's policy or practice lacks a substantial legitimate justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin....

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by minority populations. The disparate impact threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by minority populations compared to impacts borne by non-minority populations. The disparate impact threshold must be

applied uniformly...and cannot be altered until the next Title VI Program submission.

In the course of performing a Title VI Equity Analysis, the District must analyze how the proposed action would impact minority populations as compared to non-minority populations. In the event the proposed action has a negative impact that affects minorities more than non-minorities with a disparity that exceeds the adopted Disparate Impact Threshold, or that benefits non-minorities more than minorities with a disparity that exceeds the adopted Disparate Impact Threshold, the District must evaluate and demonstrate a substantial legitimate justification that cannot otherwise be accomplished, and that the proposed change is the least discriminatory alternative.

The District's Disparate Impact Threshold, which determines whether the impacts of a major service change (as defined in the Major Service Change Policy) or a fare adjustment are significant enough to require further analysis, is established at 20 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by minority populations compared to the same impacts borne by non-minority populations.

DISPROPORTIONATE BURDEN POLICY

This policy establishes a threshold for determining whether a given action has a disproportionate burden on low-income populations versus non-low-income populations. Per FTA Circular 4702.1B:

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by low-income populations. The disproportionate burden threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by low-income populations as compared to impacts borne by non-low-income populations.... The disproportionate burden threshold must be applied uniformly...and cannot be altered until the next [Title VI] program submission.

At the conclusion of the analysis, if the transit provider finds that low-income populations will bear a disproportionate burden of the proposed [fare/]service change, the transit provider should take steps to avoid, minimize or mitigate impacts where practicable. The provider should describe alternatives available to low-income populations affected by the [fare/]service changes.

The District's Disproportionate Burden Threshold, which determines whether the adverse impacts of a major service change (as defined in the Major Service Change Policy) or a fare adjustment is significant enough to require mitigation is established at 20% percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by low-income populations compared to the

same impacts borne by non-low-income populations.

PUBLIC ENGAGEMENT FOR POLICY DEVELOPMENT

FTA Circular C 4702.1B requires transit agencies to seek public input before Board action to adopt the Disparate Impact and Disproportionate Burden policies. Staff received public input through four community meetings throughout the county to further develop the District's Major Service Change, Disparate Impact and Disproportionate Burden policies. Comments were also made through the mail, telephone, and the dedicated e-mail address of TitleVI@samtrans.com.

The community meetings were held:

- Tuesday, Feb. 12, 2013 6:30 p.m. to 8 p.m.
Pacifica Sharp Park Library
104 Hilton Way, Pacifica
- Tuesday, Feb. 19, 2013 6:30 p.m. to 8 p.m.
War Memorial Activity Room
6655 Mission St., Daly City
- Thursday, Feb. 21, 2013 10:00 a.m. to 11:30 a.m.
SamTrans Offices
1250 San Carlos Ave., San Carlos
- Monday, Feb. 25, 2013 6:30 p.m. to 8 p.m.
Lewis and Joan Platt East Palo Alto Family YMCA
550 Bell St., East Palo Alto

A total of 15 members of the public participated in the meetings, providing valuable comments for staff. Upon receipt of the input from meeting attendees, staff revised the proposals for its standards and policies and submitted them for Board approval. The Board of Directors approved the Policies on March 13, 2013.

More information regarding the District's Title VI policies and standards can be found here: <http://www.SamTrans.com/riderinfo/TitleVI.html>

■ EQUITY EVALUATION OF PROPOSED CHANGES

In accordance with 49 CFR Section 21.5 (b) (2), 49 CFR Section 21.5 (b) (7) and Appendix C to 49 CFR part 21, grantees must evaluate all non-exempt fare changes to determine whether those changes have a discriminatory impact on minority or low-income populations.

In performing this analysis, it is concluded that the proposed Way2Go Pass program pricing change **would not have a disparate impact on minority customers nor impose a**

disproportionate burden on low-income customers based on the District's Policies.

FARE EQUITY METHODOLOGY OVERVIEW

Based on FTA Circular 4702.1B, for proposed changes to fares by payment type or fare media, the District should analyze any available information generated from ridership surveys that indicate whether minority and low-income passengers are more likely to use the payment types subject to the proposed change and the associated fare changes resulting from the change. If the difference in the percentage change experienced between minority riders and non-minority riders is greater than 20%, that would suggest that the fare change would result in disparate impacts on minority populations. If the percentage difference in the change experienced between low-income riders and non-low-income riders is greater than 20%, that would suggest that the fare change would result in a disproportionate burden to low-income populations. A difference of less than 0% (any negative percentage) would indicate that the fare change would benefit those populations more than the others.

This particular Fare Equity Analysis does not follow the District's typical fare equity analysis template because the subject fare product is paid for by purchasers who are not the end users, and generally, if a developer, university, or employer pays the entire pass price for their residents, students, or employees, no analysis is required. District staff reviewed previous institutional pass analyses from peer agencies including AC Transit, VTA and Sacramento Regional Transit as possible guides to conduct this type of analysis. Further, the Way2Go Pass currently only has three residential properties participating and does not have any employer participants, and the proposed fare changes would introduce a new educational pass option. As result, limited data on current and potential users are available to conduct the analysis, so alternative data sources were used as appropriate.

The analysis and methodology for this analysis use data from the SamTrans 2019 Origin-Destination Survey from Fall 2019, the 2020 Way2Go User Survey, and the American Community Survey (ACS) 5-Year for 2015-2019.

The methodology developed to analyze the impact of the fare proposal on minority populations compared to non-minority populations and low-income populations compared to non-low-income populations included the following steps:

1. Defining the term “minority” to mean those who self-identified as any ethnicity other than “white” alone or indicated that they are of Hispanic, Latino, or Spanish origin. Non-minority is defined as White/Caucasian and not of Hispanic, Latino, or Spanish origin.

2. Approximating the threshold for low-income status as those with an annual household income at or below 200 percent of the U.S. Department of Health and Human Services (HHS) poverty guidelines.²
3. Analyzing the average fare paid by current and potential users before and after the proposed fare changes and the percentage change.
4. Using survey data and current fares and proposed change to the Fare Structure to determine if the proposed fare change will have a disparate impact or disproportionate burden on minority or low-income populations, respectively, based on the agency's associated policies.

COVID-19

In March 2020, the COVID-19 pandemic caused many counties, including San Mateo County, to issue Shelter In Place (SIP) orders to prevent the spread of the COVID-19, and many riders to cease their use of public transportation. These changes reduced ridership on SamTrans by over 75% percent. At the time of writing this analysis, ridership has yet to return to pre-COVID levels. As a result, the data used for this analysis may not reflect ridership changes caused by COVID-19.

POTENTIAL ADVERSE EFFECTS

Typically, adverse effects associated with a fare change relate to the cost increase of a transit trip, fare or fare media. The residential pass and educational pass pricing would result in a decrease in average fare. Accordingly, this analysis does not anticipate any potential adverse effects to current or potential users of these programs. Rather, the residential and educational passes would create an overall benefit for the users of these programs.

DATA USE AND ANALYSIS

For purposes of examining fare payment behavior, the following data were used:

- The SamTrans 2019 Origin-Destination Survey contains ridership demographics that include ethnicity, race, income, and household size. The Survey has a sample size of 1,242, including weekday peak, off-peak, and weekend riders. Fieldwork for the SamTrans 2019 Origin-Destination Survey was conducted during Fall 2019. The collection of survey data in Spring 2020 has been postponed due to the COVID-19 pandemic. The data used in this analysis are weighted to overall monthly ridership since a sample size sufficient to weight by time period has not yet been collected.
- For the SamTrans 2019 Origin-Destination Survey, respondents were asked to

² The employer pass analysis defines an individual as low-income if the individual's annual household income was at or below or 150 percent of the poverty level due to limitations of the data available from 2019 ACS, 5-Year.

indicate whether they are of Hispanic, Latino, or Spanish origin in addition to their ethnicity. "Minority" included riders who are Asian, Native Hawaiian/Pacific Islander, Middle Eastern, Hispanic, Black/African American, American Indian/Alaskan Native, and Other (including multi-racial). "Non-minority" was defined as White/Caucasian and not of Hispanic, Latino, or Spanish origin.

- The 2020 Way2Go User Survey has a sample size of 216 surveys. Individuals were required to complete this survey prior to obtaining a pass.
- For the 2020 Way2Go User Survey, "minority" included riders who are Asian, Native Hawaiian or Other Pacific Islander, Hispanic/Latino, Black/African American, American Indian or Alaskan Native, and Other. "Non-minority" was defined as White/Caucasian.
- For the analysis using the SamTrans 2019 Origin-Destination Survey, a rider was defined as "low-income" if the rider's household income was reported as 200% or less of the federal poverty level to account for the region's higher cost of living when compared to other regions. This level is approximated by considering both the household size; 2018 household income combinations that comprise "low-income" are as follows:

HHS 2018 Poverty Guidelines

LOW INCOME	
Household Size	Household Income
1+	Under \$25K
2+	Under \$35K
3+	Under \$50K
4+	Under \$75K
5+	Under \$75K
6+	Under \$75K
7+	Under \$100K
8+	Under \$100K

For example, a household of two or more persons with an income of \$33,000 would be considered low-income.

- The residential pass analysis uses the 2020 Way2Go User Survey. A Way2Go User was defined as "low-income" if the individual's household income was reported as 200% or less of the federal poverty level. This level was approximated by considering both the household size, and household income combinations that comprise "low-income" are as follows:

HHS 2019 Poverty Guidelines

LOW INCOME	
Household Size	Household Income
1+	Under \$25K
2+	Under \$40K
3+	Under \$50K
4+	Under \$75K
5+	Under \$75K
6+	Under \$75K
7+	Under \$100K
8+	Under \$100K

- The employer pass analysis uses data from 2019 ACS, 5-Year, *Table S0804: Means of Transportation to Work by Selected Characteristics for Workplace Geography*. An individual is defined as low-income in this data set if the individual's household income is 150% or less of the poverty level. This level is defined by the United States Census Bureau following the Office of Management and Budget's Directive 14. Table S0804 does not provide data on individuals with household income of 200% of the poverty level.
- For calculating the average fare paid by potential users of the educational and employer pass programs, Fiscal Year (FY) 2019 farebox ridership data as well as monthly pass and transfer data from the SamTrans 2018 Triennial Survey were used to determine usage rates for the different fare payment methods available to full fare riders. These usage rates were applied to fare levels for the fare payment methods effective January 2020 to determine average fare per boarding.

Data Assumptions:

- Even though the SamTrans 2019 Origin-Destination Survey data is a robust set, some passengers preferred not to reveal their ethnicity, income and/or household size. Based on the unavailable data, the useable data set includes those who responded to the applicable questions to categorize respondent as minority and low-income status.

RIDERSHIP DEMOGRAPHICS OVERVIEW

To support the Fare Equity analysis, we performed cross-tabulations of the survey data to develop a breakdown of fare payment by minority and low-income riders, versus non-minority and non-low-income riders, as shown in the figures and tables below.

System-wide SamTrans Ridership Demographics

Figures 1 and 2 provide a system-wide overview on ethnicity and income based on the SamTrans 2019 Origin-Destination Survey. For SamTrans, "minority" riders are actually the

“majority” of SamTrans ridership.

Figure 1: Ridership Minority Status

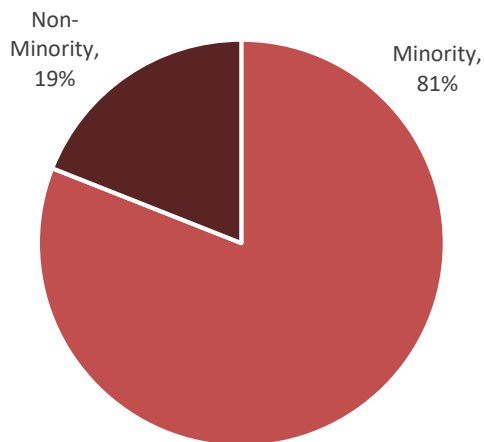
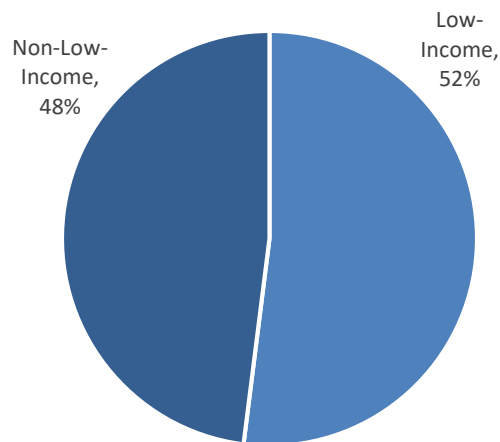


Figure 2: Ridership Income Status



Source: SamTrans 2019 Origin-Destination Survey, Fall 2019

We also reviewed the relationship between fare payment methods and ethnicity and income as we recognize that various fare changes may impact some protected groups more than others. **Table 2** and **Figure 3** present the fare payment method by minority and income status, while **Table 3** presents the percentage of minority and low-income ridership by fare payment method. While minority and non-minority riders have similar distribution among fare payment methods, low-income riders are more likely to use cash and less likely to use a monthly pass compared to non-low-income riders.

It should be noted that for less commonly used fare payment methods (e.g., Full Fare - Caltrain Monthly Pass (2+ zones) and Full Fare - Way2Go Pass) there were limited survey responses on the SamTrans 2019 Origin-Destination Survey. As such, when analyzing the demographics of these fare payment methods, there may be no survey responses for certain populations and fare payment methods (e.g., there were no non-minority respondents using a Way2Go Pass). This may skew the distribution of each ridership group by fare payment method in **Table 2** and the split between protected and non-protected populations by fare payment method in **Table 3**.

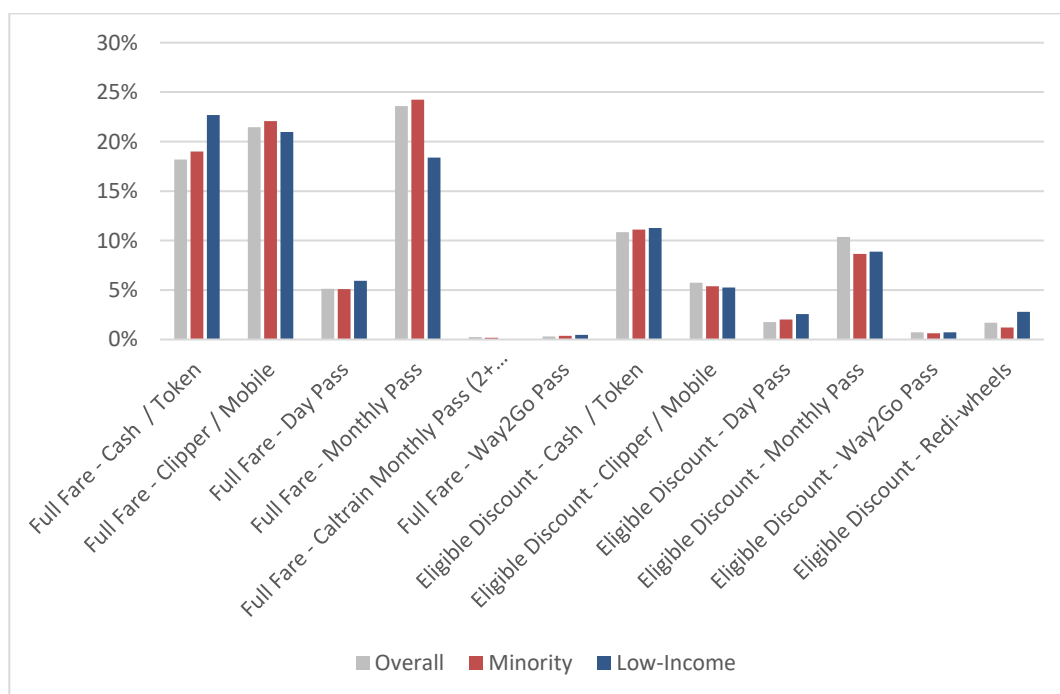
Table 2: Fare Payment Method by Ridership Group

Fare Payment Method	Overall	Minority	Non-Minority	Low-Income	Non-Low-Income
Full Fare - Cash / Token	18%	19%	16%	23%	17%
Full Fare - Clipper / Mobile	21%	22%	19%	21%	28%
Full Fare - Day Pass	5%	5%	6%	6%	5%
Full Fare - Monthly Pass	24%	24%	20%	18%	29%
Full Fare - Caltrain Monthly Pass (2+ zones)	0.2%	0.2%	0.4%	n/a	0.6%
Full Fare - Way2Go Pass	0.3%	0.4%	n/a	0.5%	n/a
Eligible Discount - Cash / Token	11%	11%	10%	11%	7%
Eligible Discount - Clipper / Mobile	6%	5%	7%	5%	5%
Eligible Discount - Day Pass	2%	2%	1%	3%	1%
Eligible Discount - Monthly Pass	10%	9%	18%	9%	7%
Eligible Discount - Way2Go Pass	1%	1%	1%	1%	1%
Eligible Discount - Redi-Wheels	2%	1%	3%	3%	1%
Total	100%	100%	100%	100%	100%

Source: SamTrans 2019 Origin-Destination Survey, Fall 2019

Note: n/a – no survey responses

Figure 3: Fare Payment Method by Ridership Group



Source: SamTrans 2019 Origin-Destination Survey, Fall 2019

Table 3: Minority and Income Status by Fare Payment Method

Fare Payment Method	Minority	Non-Minority	Total	Low-Income	Non-Low-Income	Total
Full Fare - Cash / Token	84%	16%	100%	59%	41%	100%
Full Fare - Clipper / Mobile	84%	16%	100%	45%	55%	100%
Full Fare - Day Pass	80%	20%	100%	56%	44%	100%
Full Fare - Monthly Pass	84%	16%	100%	40%	60%	100%
Full Fare - Caltrain Monthly Pass (2+ zones)	67%	33%	100%	n/a	100%	100%
Full Fare - Way2Go Pass	100%	n/a	100%	100%	n/a	100%
Eligible Discount - Cash / Token	83%	17%	100%	64%	36%	100%
Eligible Discount - Clipper / Mobile	78%	22%	100%	55%	45%	100%
Eligible Discount - Day Pass	94%	6%	100%	76%	24%	100%
Eligible Discount - Monthly Pass	68%	32%	100%	58%	42%	100%
Eligible Discount - Way2Go Pass	69%	31%	100%	56%	44%	100%
Eligible Discount - Redi-Wheels	62%	38%	100%	80%	20%	100%
Overall	81%	19%	100%	52%	48%	100%

Source: SamTrans 2019 Origin-Destination Survey, fall 2019

Note: n/a – no survey responses

For each of the three Way2Go Pass categories, we also explored the demographics of current users (Way2Go Users participating in the program through residential complexes) and potential users (those who will be eligible for the pass through educational institutions and employers), comparing these to systemwide ridership demographics, as shown in **Table 4**. These demographics were important in considering the pricing of the programs. Users who could access the pass through residential complexes are more likely to be minority and have low incomes than the systemwide SamTrans ridership. The demographics of potential users who could access the pass through educational institutions are projected to be very similar to the systemwide SamTrans ridership with a slightly higher proportion of users being having low incomes. The demographics of those who could access the pass through their employers are projected to be very different than the systemwide SamTrans ridership. Potential users of the pass through employers are expected to be more likely to be non-minority and non-low income than systemwide SamTrans ridership.

Table 4: Projected Demographics of Way2Go Pass Program Categories

Population	Minority	Non-Minority	Low-Income	Non-Low-Income
Residential Complex Pass Users	96%	4%	82%	18%
Educational Institution Pass Users	83%	17%	57%	43%
Employee Pass Users	61%	39%	6%	94%
Systemwide SamTrans Ridership	81%	19%	52%	48%

Sources: 1) Residential Complex-Provided Pass – 2020 Way2Go User Survey; 2) Educational Institution-Provided Pass – SamTrans 2019 Origin-Destination Survey, Fall 2019 (full fare riders on routes serving campuses); 3) Employer-Provided Pass – 2019 ACS, 5-Year, Table S0804: Means of Transportation to Work by Selected Characteristics for Workplace Geography; 4) Systemwide SamTrans Ridership – SamTrans 2019 Origin-Destination Survey, Fall 2019.

For the pass acquired from residential complexes, the demographics from the 2020 Way2Go User Survey were used instead of the SamTrans 2019 Origin-Destination Survey due to the larger sample size. The 2020 Way2Go User Survey had a sample size of 221 potential users compared to the 2019 Origin-Destination Survey with a sample size of 12. Individuals are required to complete this survey prior to obtaining a pass. While only approximately two-thirds of respondents provided the necessary demographic information (e.g., ethnicity, household size, and income), there were still 140 records with sufficient information to determine minority status and 124 records with sufficient information to determine low-income status.

For the pass available through educational institutions, the demographics of potential users were estimated based on the demographics of full fare riders on routes serving San Francisco State University (route 122) and the three San Mateo County Community College District (SMCCCD) campuses, including Skyline College located in San Bruno (routes 121, 140), College of San Mateo in San Mateo (routes 250, 260, 294), and Cañada College in Redwood City (routes 274, 275, 278). The proportion of the student body that is “White, non-Hispanic” generally aligns with the rider survey data for the routes serving the campuses. Minority status data is available for these student bodies, but not income status. For San Francisco State University, 15% of undergraduates indicated they identify as “White, non-Hispanic” in academic year 2020-2021. For SMCCCD, 17% of the fall cohorts for 2015-2019 indicated they identify as “White.”

In 2019, according to the United States Bureau of Labor Statistics, there were more than 21,000 employer establishments in San Mateo County. More than half had fewer than five employees. Given the uncertainty of which employers would participate in the Way2Go Pass option with the revised pricing, demographics of employees in San Mateo County were used. Data on demographics of employees working in San Mateo County are available from 2019 ACS, 5-Year, *Table S0804: Means of Transportation to Work by Selected Characteristics for Workplace Geography*. As noted previously, the definition of “low-income” varies slightly from how low-income was defined for surveys administered by the District, which apply HHS poverty guidelines. Table S0804 provides information on individuals with household income under 150% of the poverty level while the SamTrans rider survey defines “low income” as individuals with household incomes under 200% of the poverty level.

ANALYSIS METHODOLOGY

This Fare Equity Analysis assesses how minority and low-income (protected) vs. non-protected current and potential users would be affected by the proposed fare changes by comparing the average fare before and after the proposed fare changes, and the percentage changes, within each category of potential pass users: those acquiring it from residential complexes, educational institutions and employers. In accordance with the District's Disparate Impact Policy and Disproportionate Burden Policy, impacts are considered disparate or disproportionate when the differences are greater than 20%. Due to inconsistencies across the potential Way2Go Pass participants, each of the categories of

potential pass users are analyzed separately, rather than cumulatively.

Average Fare

This Fare Equity Analysis estimates the average fare paid (or received by SamTrans) before and after the proposed fare changes for potential users. Due to impacts of COVID-19 on ridership, pre-COVID average fare data were used. In addition, average fares were adjusted to reflect fare changes that went into effect in January 2020.

Using historical data, the average fare for before the proposed fare changes is calculated for:

- Average fare per boarding for Way2Go Pass users (revenue per user of the residential pass)
- Average fare per boarding for SamTrans full fare riders (average fare paid by potential users of the educational and employer passes)

For users of the pass program receiving passes through residential complexes, the analysis uses the average fare for the Way2Go Pass program to approximate the average fare per boarding before the proposed fare changes. The average fare per boarding was calculated by using an average of the total annual contract values for calendar year 2018 and 2019 and the ridership from FY 2019 (July 2018 through June 2019).

For the users of the pass programs receiving passes through educational institutions and employers, the average fare paid before introduction of the program, and proposed fare changes, most aligns with the fare paid by full fare riders. The average fare per boarding for full fare riders was developed using FY 2019 farebox ridership and estimated monthly pass usage and transfer data from the SamTrans 2018 Triennial Survey. Adjustments to the average fare for full fare SamTrans riders were made to reflect the fare changes implemented in January 2020 that affected full fare riders including the introduction of free transfers for Clipper and Mobile Ticketing users, decrease in day pass price from \$5.50 to \$4.50, and transition from out of SF fares to Express fares (\$4.00 to \$4.50 for cash fare and the corresponding increases in Clipper, day pass/transfer upgrade, and monthly pass pricing). The estimated average fare per boarding by full fare payment method is shown in **Table 5. Attachment 4** includes comparison of the average fare by full fare payment method to average fare for Way2Go Pass and systemwide average.

Table 5: Average Fare by Full Fare Payment Method

Full Fare Payment Method	Avg. Fare
Local - Cash / Token	\$2.25
Local - Clipper / Mobile	\$1.52
Local - Day Pass	\$1.44
Local - Monthly Pass	\$0.90
Express - Cash / Token	\$4.50
Express - Clipper / Mobile	\$2.97
Express - Monthly Pass	\$1.78
Full Fare Average	\$1.51

The average fare per boarding for SamTrans full fare riders is assumed to vary for minority, non-minority, low-income, and non-low-income riders based on distribution of ridership among fare payment methods. To create a weighted average fare for each population, the analysis applied the average fare by fare payment method to the distribution of full fare riders for a specific population among the available subset of fare payment methods for full fare riders, see **Table 2**.

The estimated average fare for before the proposed fare changes is shown in **Table 6**.

Table 6: Average Fare before Proposed Fare Changes

Population – Baseline Average Fare	Minority	Non-Minority	Low-Income	Non-Low-Income
Residential Complex Users of Way2Go Pass	\$3.64			
Passengers Using Passes through Educational Institutions & Employers - Full Fare	\$1.52	\$1.51	\$1.59	\$1.48

The projected average fares after the proposed fare changes were calculated based on the proposed pass pricing and the projected average number of boardings per user as shown in **Table 7**. Given the proposed Way2Go Pass contract minimum, the projected average fares are assumed to be based on the pass price and not the contract minimum. In the baseline average fare, one of the participants had fewer than 100 residents and paid the contract minimum rather than per pass. With the proposed contract minimum, the cost based on number of users would exceed the contract minimum for this participant (and consequently this participant as well as other residential pass participants would experience a contract price decrease due to the decrease in pass price).

Table 7: Average Fare by Pass Program Category after Proposed Fare Changes

Pass Program	Pass Price	Boardings per User	Average Fare
Residential Complex	\$40/year	40.8	\$0.98
Educational Institution	\$35/semester	29.6	\$1.18
Employer	\$75/year	48.0	\$1.56

The projected average number of boardings per pass obtained through residential complexes was based on actuals from February 2020 extrapolated for an entire year. For the passes acquired through educational institutions, the projected average number of boardings was estimated based on a two-week long Try Transit pilot program in 2019 for students of the San Mateo County Community College District. For the passes obtained through employers, the projected average number of boardings was based on findings from peer agencies' employer pass programs and literature review.

FARE EQUITY ANALYSIS FINDINGS

The following analyzes whether the proposed fare changes would result in a Disparate Impact or Disproportionate Burden for any of the three categories of pass users. Based on the differences in proposed pass price and average fare, each category is analyzed separately. Sufficient data is not available on how different populations will use their passes to assume different average fares for protected and non-protected pass users, nor to combine the data across the three categories of users. Residential complexes are the only type of organization currently participating of the Way2Go pass program, and therefore the average fare is based on actual usage. Usage assumptions for the other categories are based on previous pilot programs and peer agency review, as described below. The difference in usage assumptions is why the three categories cannot be analyzed as one.

Users Accessing Way2Go Pass Through Residential Complexes

For those accessing the pass through residential complexes, the average fare per boarding is expected to decrease 73% as shown in **Table 8**. The average fare and unit change amounts shown below are the same for both protected and non-protected users. As noted in Table 4, the demographics of these pass users are more likely to be minority and low-income than the system-wide SamTrans ridership.

Table 8: Residential Complexes: Pass Program Average Fare Analysis

	Average Fare		Unit Change	
	Before	After	\$	%
Way2GoPass-Residential Complexes (Protected and non-protected users)	\$3.64	\$0.98	-\$2.66	-73%

The decrease in pass price brings the average fare for the residential pass more in-line with the average fare for SamTrans motorbus of \$1.38 in FY 2019. Given that participants pay for all residents five years old and older, and that all three current participants are affordable housing properties, it is reasonable that the average fare under the proposed fare changes is lower than the systemwide average fare. The lower average fare also reflects the use of Clipper START pilot program, which launched in January 2021. This program allows low-income residents to purchase One Way Clipper fares at 50% discount. As more riders utilize the Clipper START pilot program, it's likely the systemwide average fare for SamTrans will decrease, which will better align with the decreased average fare for the Way2Go residential pass.

Based on the analysis, all users are uniformly impacted and experience a benefit, as such the difference in how protected and unprotected populations are impacted is 0%. **Thus, it is concluded that the changes to Way2Go Pass program pricing for residential complexes would not have a disparate impact on minority users or impose a disproportionate burden on low-income users based on the District's Title VI Policies.**

Users Accessing Way2Go Pass Through Educational Institutions

For those accessing the pass through educational institutions, the average fare per boarding is expected to decrease between 20% and 26% as shown in Table 9. As noted in Table 4, the demographics of potential pass users accessing the pass through educational institutions are projected to be very similar to the system wide SamTrans ridership with a slightly higher proportion of users having low incomes.

Table 9: Educational Institutions: Pass Program Average Fare Analysis

	Average Fare		Unit Change		% Difference between Protected and Non-Protected
	Before	After	\$	%	
Minority User	\$1.52	\$1.18	-\$0.34	-22%	0%
Non-Minority User	\$1.51	\$1.18	-\$0.33	-22%	
Low-Income User	\$1.59	\$1.18	-\$0.41	-26%	-6%
Non-Low-Income User	\$1.48	\$1.18	-\$0.30	-20%	

While minority and non-minority users accessing the pass through educational institutions would experience a similar decrease in average fare under an expanded Way2Go Pass program, low-income users would experience a greater decrease in average fare than non-low-income users. **Thus, it is concluded that the educational pass program pricing would not have a disparate impact on minority users nor impose a disproportionate burden on low-income users based on the District's Title VI Policies.**

Users Accessing Way2Go Pass Through Employers

For those acquiring passes from their employers, the average fare per boarding is expected to remain relatively the same with the proposed fare changes as shown in Table 10. Minority and non-minority users are both expected to experience a 3% increase in average fare. Low-income users are expected to experience a slight decrease of 2% while non-low-income users are expected to experience a slight increase of 5%. As noted in Table 4, the demographics of potential employer pass users are projected to be very different than the system wide SamTrans ridership. Potential users of an employer-provided pass are expected to be more likely to be non-minority and non-low income than system wide SamTrans ridership.

Table 10: Employer/ees: Pass Program Average Fare Analysis

	Average Fare		Unit Change		% Difference between Protected and Non-Protected
	Before	After	\$	%	
Minority User	\$1.52	\$1.56	+\$0.04	+3%	0%
Non-Minority User	\$1.51	\$1.56	+\$0.05	+3%	
Low-Income User	\$1.59	\$1.56	-\$0.03	-2%	-7%
Non-Low-Income User	\$1.48	\$1.56	+\$0.08	+5%	

While minority and non-minority users would both experience a 3% increase in average fare, low-income users would experience a decrease of 2% in average fare while non-low-income users would experience an increase of 5%. **Thus, it is concluded that the changes to pass program pricing for employer-provided passes would not have a disparate impact on minority users nor impose a disproportionate burden on low-income users based on the District's Title VI Policies.**

■ PUBLIC OUTREACH AND INVOLVEMENT ACTIVITIES

Throughout the study and development of the proposed fare changes, Staff engaged and received guidance from stakeholders, including Mid-Pen Housing and other non-profit developers, educational institutions, San Mateo County businesses, and peer transit agencies. A list of organizations that participated in a stakeholder survey and follow-up surveys are included in **Attachment 5**.

This pass is not available for public purchase. Only Bay Area institutions are/are proposed to be eligible to purchase this pass as a benefit to their residents, employees, or students. Therefore, outreach was targeted towards institutional stakeholders as directed in SamTrans Public Participation Plan. Upon approval of the new pricing, District staff will develop a campaign to inform stakeholders and their constituents of the benefits and procedures. As per the District's Language Access Plan, this campaign would include materials in Spanish, Chinese, and other identified stakeholder languages.

Stakeholder Survey

The stakeholder survey was distributed to determine the needs and desires in a bulk pass program, and how the Way2Go Pass program can be changed or improved to better fit the needs of both current and potential future stakeholders. Stakeholders surveyed included employers, educational institutions, and residential properties.

The stakeholder survey was distributed online via Survey Monkey in November 2020. District staff reached out to twenty stakeholders, some of which shared with their constituents/members and networks. **Attachment 5** summarizes the stakeholders that responded to the survey. The stakeholder survey received complete responses from eight stakeholders.

Follow-up Conversations

Staff reached out to the stakeholders that completed the survey to see if they were available for a follow-up conversation. Out of the eight stakeholders that completed the survey, six were available. Staff had follow-up discussions with MidPen Housing, Eden Housing, San Mateo Community College District, Stanford University, Stanford Health Care, and Google. After the draft pricing structure was created, staff met with five of the six stakeholders, from the initial follow-up discussions, to gain additional feedback. Those five stakeholders included MidPen Housing, Eden Housing, San Mateo Community College District, Stanford University, and Stanford Health Care.

District Board of Directors

Staff presented the proposed changes to the Way2Go Pass program via a PowerPoint presentation at the District's July 2021 Board of Directors meeting. Several comments were made by the directors about decreasing or eliminating the minimum contract amount. Based on the feedback received, staff will bring back final recommendations for Board action at the August 2021 Board meeting. The Board meetings are open to the public and anyone is able to make a public comment. Representatives from MidPen Housing and Eden Housing both made comments in support of the proposed Way2Go Pass changes at the July meeting.

Previous Engagement Efforts - SMCCCD Try Transit Program

In 2019, District staff conducted a two-week free pass program for San Mateo County Community College District (SMCCCD) students called the SMCCCD Try Transit pass program. Try Transit passes were valid for the period August 14-31. Passes were distributed on-site at each of the three community colleges campuses during Welcome Week activities (August 14 and 15), as well as on additional days the following week (August 19 and 20). Over four days, about 1,700 passes were distributed.

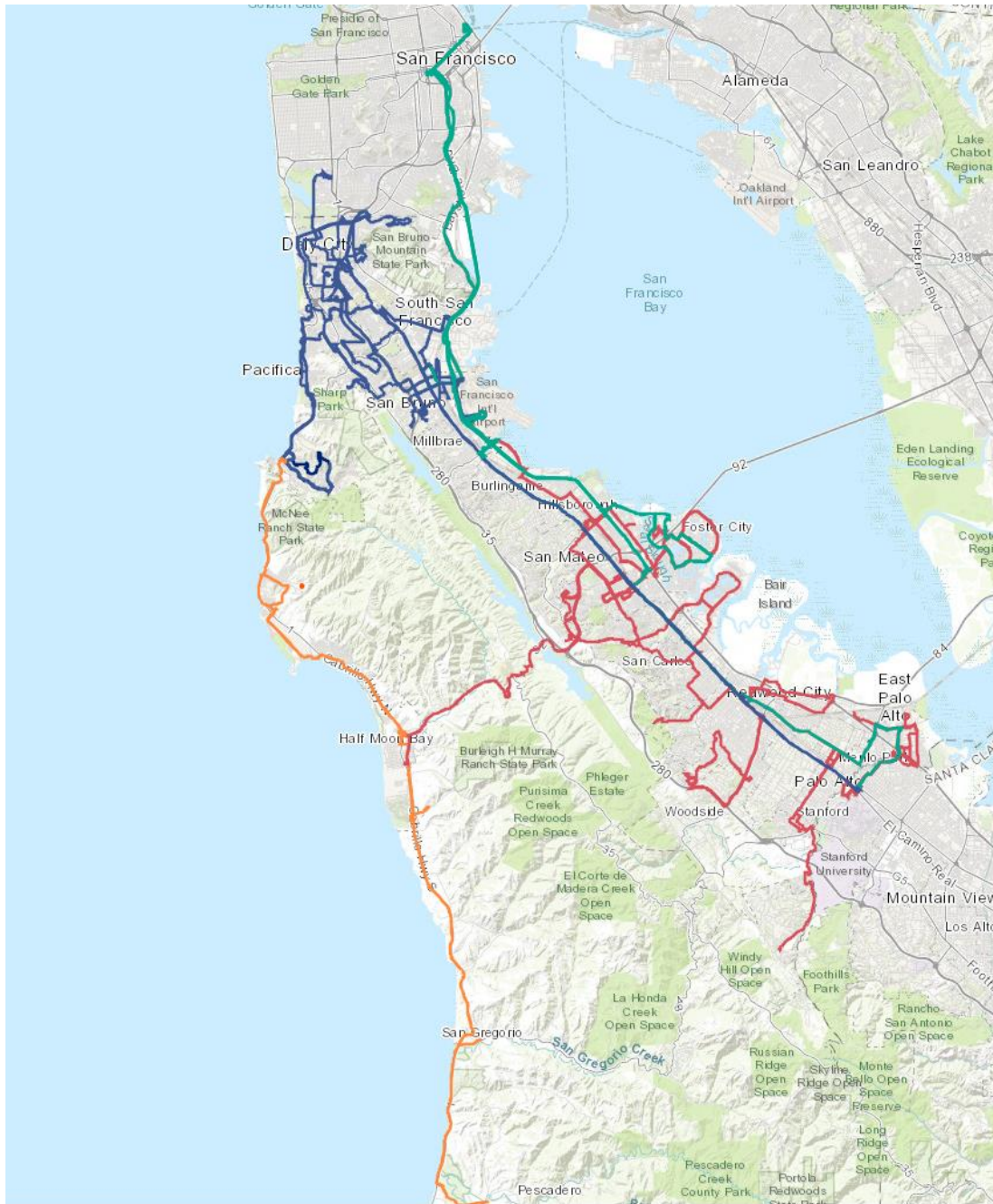
Staff developed a pre-pilot survey that participants were required to complete in order to receive a Try Transit pass, as well as a post-pilot survey that was distributed electronically via participant e-mail addresses collected in the pre-pilot survey. Both surveys were

designed to gather qualitative data including trip-making patterns and habit information to supplement the pass usage data provided by the program's mag stripe cards. The post-pilot survey provides the most relevant results to inform the expansion of the Way2Go Pass to educational institutions.

The post-pilot survey was distributed to the 1,652 people who received passes and shared their e-mail addresses in the pre-pilot survey. Of respondents to the post-pilot survey, 92 percent said they used their Try Transit pass, while 8 percent did not use the pass. Of the 92 percent who used their pass, 22 percent were trying SamTrans for the first time.

When asked if they would be interested in an unlimited pass for the entire school year, 97 percent said yes. And when asked a follow-up question about whether they would be willing to add a mandatory transportation fee of less than \$20 per semester to fund the pass, respondents were receptive if the pass was coupled with improvements to the service provided to the community college campuses. The top requests were more frequent buses and buses that took less time to make the trip. However, "yes, if" responses generated selections at just over 50 percent and the post-pilot survey as a whole represents only a very small sample of the student population.

ATTACHMENT 1 – SAMTRANS SYSTEM MAP (Effective August 16, 2020)



ATTACHMENT 2 – BOARD APPROVAL OF DISPARATE IMPACT AND DISPROPORTIONATE BURDEN POLICIES

RESOLUTION NO. 2013 –09

BOARD OF DIRECTORS, SAN MATEO COUNTY TRANSIT DISTRICT
STATE OF CALIFORNIA

* * *

**ADOPTION OF SYSTEM-WIDE SERVICE STANDARDS AND POLICIES, DEFINITION OF "MAJOR SERVICE CHANGE," AND DISPARATE IMPACT AND DISPROPORTIONATE BURDEN POLICIES
REQUIRED FOR COMPLIANCE WITH TITLE VI OF THE CIVIL RIGHTS ACT OF 1964**

WHEREAS, Title VI of the Civil Rights Act of 1964 requires recipients of Federal grants and other assistance to operate their programs and services without regard to, or discrimination based on, race, color or national origin; and

WHEREAS, the Federal Transit Administration (FTA) issued Circular FTA C 4702.1B, effective October 1, 2012, setting forth requirements and guidelines for Title VI compliance; and

WHEREAS, as set forth in the above-referenced Circular, the Board of Directors is required to adopt System-Wide Service Standards and Policies to guide the equitable distribution of SamTrans programs and services; and

WHEREAS, the San Mateo County Transit District (District) is also required to adopt policies to define when a service change is sufficiently broad or large to necessitate a review of its potential impacts on minority and low-income populations, and to define when a fare change or major service change will have a disparate impact on minority populations or impose a disproportionate burden on low-income populations, all of which policies and definitions are required to be subject to public input; and

WHEREAS, over the past two months, District staff has presented draft policies to this Board and the public in Board meetings and other public meetings, undertaken extensive public outreach and accepted public comment on the policies; and

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WHEREAS, the General Manager/CEO recommends the Board approve the attached System-Wide Service Standards and Policies, definition of "Major Service Change," and Disparate Impact and Disproportionate Burden policies, which comply with FTA requirements and which will guide future decisions regarding and monitoring of SamTrans' programs and services to ensure they are provided equitably, without discrimination based on race, color or national origin.

NOW, THEREFORE, BE IT RESOLVED the Board of Directors of the San Mateo County Transit District hereby approves the attached System-Wide Service Standards and Policies, definition of "Major Service Change," and Disparate Impact and Disproportionate Burden policies.

Regularly passed and adopted this 13th day of March, 2013 by the following vote:

AYES: DEAL, GEE, GUILBAULT, HARRIS, KERSTEEN-TUCKER,
LLOYD, MATSUMOTO, TISSIER, GROOM

NOES: NONE

ABSENT: NONE

Carole Groom
Chair, San Mateo County Transit District

ATTEST:

Shantel Martinez
District Secretary

STAFF REPORT ATTACHMENT

SAMTRANS TITLE VI STANDARDS AND POLICIES

Federal Title VI requirements of the Civil Rights Act of 1964 were recently updated by the Federal Transit Administration (FTA) and now require each large public transportation provider's governing board to approve five standards and policies:

- Major Service Change Policy
- Disparate Impact Policy
- Disproportionate Burden Policy
- System-wide Service Standards
- System-wide Service Policies

Staff has developed draft standards and policies and included them within this document for Board review.

The first policy defines "major service change" as a threshold for when an agency will conduct a thorough analysis of the potential effects of service changes on protected populations. For the second and third policies, agencies are required to define thresholds for when they will find that a fare change or major service change will result in a "disparate impact" on the minority population or a "disproportionate burden" on the low-income population. The last two policies define service standards and policies to be used when determining whether service and amenities are distributed equitably to minority and non-minority routes and facilities.

The Major Service Change Policy, Disparate Impact Policy, and Disproportionate Impact Policy are currently going through public review via a series of four public meetings held throughout the county. Information about the Title VI process, complaint procedures, and the proposed standards and policies are available via the SamTrans website as well by calling the customer service phone number or emailing a dedicated email address.

These policies are in draft form and will be revised based on input from the public and the Board. They will be brought back as final proposals for approval by the Board at the March 13 meeting.

PART 1

MAJOR SERVICE CHANGE POLICY

All major increases or decreases in transit service are subject to a Title VI Equity Analysis prior to Board approval of the service change. A Title VI Equity Analysis completed for a major service change must be presented to the San Mateo County Transit District Board of Directors for its consideration and included in the SamTrans Title VI Program with a record of action taken by the Board.

A major service change is defined as:

A reduction or increase of 25 percent or more in total vehicle revenue miles in service on any specific route over a one-week period.

The following service changes are exempted:

- Changes to a service on a route with fewer than 10 total trips in a typical service day are not considered "major" unless service on that route is eliminated completely on any such day.
- The introduction or discontinuation of short- or limited-term service (e.g., promotional, demonstration, seasonal or emergency service, or service provided as mitigation or diversions for construction or other similar activities), as long as the service will be/has been operated for no more than twelve months.
- SamTrans-operated transit service that is replaced by a different mode or operator providing a service with the same or better headways, fare, transfer options, span of service, and stops.

PART 2

DISPARATE IMPACT POLICY

This policy establishes a threshold for determining whether a given action has a disparate impact on minority populations. Per FTA Circular 4702.1B:

Disparate impact refers to a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the recipient's policy or practice lacks a substantial legitimate justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin...

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by minority populations. The disparate impact threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by minority populations compared to impacts borne by non-minority populations. The disparate impact threshold must be applied uniformly... and cannot be altered until the next Title VI Program submission.

In the course of performing a Title VI Equity Analysis, SamTrans must analyze how the proposed action would impact minority as compared to non-minority populations. In the event the proposed action has a negative impact that affects minorities more than non-minorities with a disparity that exceeds the adopted Disparate Impact Threshold, or that benefits non-minorities more than minorities with a disparity that exceeds the adopted Disparate Impact Threshold, SamTrans must evaluate whether there is an alternative that has a more equitable impact. Otherwise, SamTrans must take measures to mitigate the impact of the proposed action on the affected minority population and demonstrate that a legitimate business purpose cannot otherwise be accomplished and that the proposed change is the least discriminatory alternative.

The Disparate Impact Threshold to determine if the adverse impacts of a major service change (as defined in the first part of this document) or a fare adjustment is established at 20 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by minority populations compared to the same impacts borne by non-minority populations.

PART 3

DISPROPORTIONATE BURDEN POLICY

This policy establishes a threshold for determining whether a given action has a disproportionate burden on low-income populations versus non-low-income populations. The Disproportionate Burden Policy applies only to low-income populations that are not also minority populations. Per FTA Circular 4702.1B:

The policy shall establish a threshold for determining when adverse effects of [fare/]service changes are borne disproportionately by low-income populations. The disproportionate burden threshold defines statistically significant disparity and may be presented as a statistical percentage of impacts borne by low-income populations as compared to impacts born by non-low-income populations.... The disproportionate burden threshold must be applied uniformly... and cannot be altered until the next [Title VI] program submission.... At the conclusion of the analysis, if the transit provider finds that low-income populations will bear a disproportionate burden of the proposed fare[/service] change, the transit provider should take steps to avoid, minimize, or mitigate impacts where practicable. The transit provider should describe alternatives available to low-income populations affected by the fare[/service] changes.

The SamTrans Disproportionate Burden Threshold to determine if the adverse impacts of a major service change (as defined in the first part of this document) or a fare adjustment is established at 20 percent based on the cumulative impact of the proposed service and/or fare changes. This threshold applies to the difference of the impacts borne by low-income populations compared to the same impacts borne by non-low-income populations.

PART 4

SYSTEMWIDE SERVICE STANDARDS

Pursuant to requirements set forth in The Federal Transit Administration's (FTA) Circular 4702.1B SamTrans must establish and monitor its performance under quantitative Service Standards and qualitative Service Policies. These service standards contained herein are used to develop and maintain efficient and effective fixed-route transit service. In some cases, these standards differ from standards used by SamTrans for other purposes.

The FTA requires all fixed-route transit providers of public transportation to develop quantitative standards for the following indicators. Individual public transportation providers set these standards; therefore, these standards will apply to each individual agency rather than across the entire transit industry:

- A. Vehicle Load
- B. Vehicle Headways
- C. On-time Performance
- D. Service Availability

For the purposes of defining service standards and policies for SamTrans fixed-route service, the agency has split its system into four route categories:

- Coastal: Routes serving the coastal community – from Half Moon Bay to Pacifica, excluding those routes which link Pacifica to Daly City.
- Community: Infrequent, community-specific routes which do not operate during off-peak hours.
- Local: Routes designed to carry passengers between major passenger hubs, employment centers, and residential neighborhoods.
- Multi-city: Routes serving multiple cities, including some offering express or late-night service.
- Mainline: Long-distance routes serving significant portions of the county, generally at higher frequency.

The categories were not developed to, and in fact do not, differentiate routes by minority or income status of the areas or passengers served. The following chart illustrates which routes belong to each category:

Exhibit 1: Routes by Category

Category	Routes
Coastal	14, 16, 17, 294
Community	24, 35, 36, 38, 43, 46, 53, 54, 55, 58, 72, 73, 83, 85
Local	110, 112, 118, 120, 121, 122, 123, 130, 132, 133, 140, 141, 250, 251, 260, 262, 270, 271, 274, 280, 281
Multi-City	295, 296, 297, 359, 397, KX
Mainline	292, 390, 391, ECR

SamTrans also defines service standards differently for peak and off-peak service. "Off-peak" refers to weekday midday and evening service, as well as Saturday, Sunday, and Holiday service.

A. VEHICLE LOAD

Vehicle Load Factor is described as follows by FTA Circular 4702.1B:

Vehicle load can be expressed as the ratio of passengers to the total number of seats on a vehicle. For example, on a 40-seat bus, a vehicle load of 1.3 means all seats are filled and there are approximately 12 standees. A vehicle load standard is generally expressed in terms of peak and off-peak times. Transit providers that operate multiple modes of transit must describe the specific vehicle load standards for peak and off-peak times for each mode of fixed-route transit service (i.e., bus, express bus, bus rapid transit, light rail, heavy rail, commuter rail, passenger ferry, etc., as applicable), as the standard may differ by mode.

SamTrans calculates Vehicle Load Factor by dividing the average peak passenger load on each route by the number of seats on the type of bus typically assigned to that route. Vehicle Load Factor is monitored regularly to ensure customer comfort and to determine whether additional capacity needs to be added to specific trips or routes based on changing demand patterns. Vehicle Load Factor standards are presented in the exhibit below.

Exhibit 2: Vehicle Load Factor Standards

Category	Peak	Off-Peak
Coastal	1.25	1.00
Community	1.50	N/A
Local	1.25	1.00
Multi-City	1.25	1.00
Mainline	1.50	1.25

B. VEHICLE HEADWAY

Vehicle headway is described as follows by FTA Circular 4702.1B:

Vehicle headway is the amount of time between two vehicles traveling in the same direction on a given line or combination of lines. A shorter headway corresponds to more frequent service. Vehicle headways are measured in minutes (e.g., every 15 minutes); service frequency is measured in vehicles per hour (e.g., four buses per hour). Headways and frequency of service are general indications of the level of service provided along a route. Vehicle headway is one component of the amount of travel time expended by a passenger to reach his/her

destination. A vehicle headway standard is generally expressed for peak and off-peak service as an increment of time (e.g., peak: every 15 minutes; and off peak: every 30 minutes). Transit providers may set different vehicle headway standards for different modes of transit service. A vehicle headway standard might establish a minimum frequency of service by area based on population density. For example, service at 15-minute peak headways and 30-minute off-peak headways might be the standard for routes serving the most densely populated portions of the service area, whereas 30-minute peak headways and 45-minute off-peak headways might be the standard in less densely populated areas. Headway standards are also typically related to vehicle load. For example, a service standard might state that vehicle headways will be improved first on routes that exceed the load factor standard or on routes that have the highest load factors.

SamTrans calculates headway by determining the average length of time between buses on each route during peak and off-peak times. In the event a route regularly exceeds Vehicle Load Factor standards, SamTrans will evaluate whether frequency on that route should be adjusted within the confines of existing or expected funding levels. Vehicle headway standards are presented in the exhibit below.

Exhibit 3: Vehicle Headway Standards

Category	Peak	Off-Peak
Coastal	90 minutes	90 minutes
Community	60 minutes	N/A
Local	60 minutes	60 Minutes
Multi-City	60 minutes	60 Minutes
Mainline	30 minutes	60 minutes

C. ON-TIME PERFORMANCE

On-time performance is described as follows by FTA Circular 4702.1B:

On-time performance is a measure of runs completed as scheduled. This criterion first must define what is considered to be "on time." For example, a transit provider may consider it acceptable if a vehicle completes a scheduled run between zero and five minutes late in comparison to the established schedule. On-time performance can be measured against route origins and destinations only, or against origins and destinations as well as specified time points along the route. Some transit providers set an on-time performance standard that prohibits vehicles from running early (i.e., ahead of schedule) while others allow vehicles to run early within a specified window of time (e.g., up to five minutes ahead of schedule). An acceptable level of performance must be defined (expressed as a percentage). The percentage of runs completed system-wide or on a particular route or line within the standard must be calculated and

measured against the level of performance for the system. For example, a transit provider might define on-time performance as 95 percent of all runs system-wide or on a particular route or line completed within the allowed "on-time" window.

A bus is determined to be late if it departs its scheduled "time point" five or more minutes later than the published time. Buses are considered early if they depart from a published time point at any time prior to the scheduled departure. It is SamTrans' goal to be on-time at least 85 percent of the time. On-time performance is tracked and published on a weekly basis and also included within monthly performance reports to the SamTrans Board of Directors. Bus Transportation staff also regularly monitors on-time performance and counsels operators who consistently fail to meet on-time performance standards that are within their control. Discussions with bus operators are also used to identify vehicle scheduling issues which are corrected through service changes three times annually. On-time performance standards are presented in the exhibit below.

Exhibit 4: On-Time Performance Standards

Category	Peak	Off-Peak
Coastal	85 percent	85 percent
Community	85 percent	N/A
Local	85 percent	85 percent
Multi-City	85 percent	85 percent
Mainline	85 percent	85 percent

D. SERVICE AVAILABILITY

Service availability/transit access is described as follows by FTA Circular 4702.1B:

Service availability is a general measure of the distribution of routes within a transit provider's service area. For example, a transit provider might set a service standard to distribute routes such that a specified percentage of all residents in the service area are within a one-quarter mile walk of bus service or a one-half mile walk of rail service. A standard might also indicate the maximum distance between stops or stations. These measures related to coverage and stop/station distances might also vary by population density. For example, in more densely populated areas, the standard for bus stop distance might be a shorter distance than it would be in less densely populated areas, and the percentage of the total population within a one-quarter mile walk of routes or lines might be higher in more densely populated areas than it would be in less densely populated areas. Commuter rail service or passenger ferry service availability standards might include a threshold of residents within a certain driving distance as well as within walking distance of the stations or access to the terminal.

SamTrans' goal is to ensure 70 percent of county residents live within walking distance (i.e., one quarter mile) of a bus stop. SamTrans service is particularly strong in communities with significant minority and low-income populations. Transit access is determined by mapping all active bus stops within the system and then calculating the population (based on 2010 Census data) within one-quarter mile radii of those stops. This information is then compared to the total county population.

PART 5

SYSTEMWIDE SERVICE POLICIES

The FTA requires fixed-route transit providers to develop a policy for each of the following service indicators. Transit providers also may opt to set policies for additional indicators. The following system-wide policies differ from service standards in that they are not necessarily based on meeting a quantitative threshold, but rather qualitative evaluation results:

- A. Vehicle Assignment
- B. Transit Amenities

A. VEHICLE ASSIGNMENT

Vehicle assignment is described as follows by FTA Circular 4702.1B:

Vehicle assignment refers to the process by which transit vehicles are placed into service in depots and on routes throughout the transit provider's system. Policies for vehicle assignment may be based on the age of the vehicle, where age would be a proxy for condition. For example, a transit provider could set a policy to assign vehicles to depots so that the age of the vehicles at each depot does not exceed the system-wide average. The policy could also be based on the type of vehicle. For example, a transit provider may set a policy to assign vehicles with more capacity to routes with higher ridership and/or during peak periods. The policy could also be based on the type of service offered. For example, a transit provider may set a policy to assign specific types of vehicles to express or commuter service. Transit providers deploying vehicles equipped with technology designed to reduce emissions could choose to set a policy for how these vehicles will be deployed throughout the service area.

SamTrans' policy with respect to vehicle assignment is depot-specific. SamTrans currently has four general types of buses in the fleet, all of which are maintained to the same strict standards (whether by the District or its contract operator):

- 29-foot transit coaches
- 35-foot low-floor transit coaches
- 40-foot transit coaches
- 60-foot articulated coaches

All buses have the same level of amenities available to riders. Coaches are distributed among the various depots according to the number of operator runs assigned to each depot. The specific type of vehicle is then chosen by the operator based on the demands of the specific schedules he/she will be operating that day (i.e., shorter buses

are used on routes with tighter turning motions, articulated coaches are used on routes with higher ridership). All 29-foot buses are assigned to Route 17, which operates along the coast and generally has lower ridership and features difficult turning motions at certain points along the route. SamTrans is expecting delivery of new diesel-hybrid coaches in the next several years. Those new buses will be assigned in such a manner to ensure they are distributed equitably among the communities SamTrans serves.

In short, buses are not assigned to specific communities within San Mateo County based on vehicle age or size but rather to serve specific routes that call for them based on the needs of that route. Many of the routes and runs serve multiple communities with diverse populations. Given SamTrans' strict standards with respect to maintenance, age does not serve as a viable proxy for diminished quality.

B. TRANSIT AMENITIES

Transit amenities is described as follows by FTA Circular 4702.1B:

Transit amenities refer to items of comfort, convenience, and safety that are available to the general riding public. Fixed-route transit providers must set a policy to ensure equitable distribution of transit amenities across the system. Transit providers may have different policies for the different modes of service that they provide. Policies in this area address how these amenities are distributed within a transit system, and the manner of their distribution determines whether transit users have equal access to these amenities. This...is not intended to impact funding decisions for transit amenities. Rather, this...applies after a transit provider has decided to fund an amenity.

Transit amenities are distributed on a system-wide basis. Transit amenities include shelters, benches, trash receptacles, and park-and-ride facilities. The location of transit amenities is determined by factors such as ridership, individual requests, staff recommendations, and vendor preference (in the case of shelters which feature advertisements).

Bus Shelters

District policy states that shelters are considered for installation based on the following criteria:

- Stops where more than 200 passengers board each day.
- 75 percent of shelters shall be located in Census Tracts on routes associated within urbanized areas.
- Distribution of shelters county-wide should match the distribution of minority Census tracts.
- Locations for shelters with advertisements are chosen by the vendor based on the visibility and traffic.

District policy also states that all bus shelters shall include trash receptacles and that all stops with shelters and benches be cleaned and have their trash receptacles emptied at least once each week.

Bus Stop Benches

Benches are considered for installation based on the following criteria:

- Stops where more than 200 passengers board each day.
- Distribution of benches county-wide should match the distribution of minority Census tracts.

District policy states that stops with benches shall be cleaned at least once each week.

Trash Receptacles

Trash receptacles are considered for installation based on the following criteria:

- Stops where over 200 passengers board each day.
- Distribution of trash receptacles county-wide should match the distribution of minority Census tracts.

District policy states that trash receptacles shall be emptied at least one each week.

Next Bus Arrival Signage

Electronic signage informing passengers of the predicted arrival of the next bus for a given route can significantly improve the experience for customers. The District's policy with respect to electronic bus arrival signage is to install signage at locations meeting the following criteria:

- The location is a multi-modal transit center.
- The location is served by multiple SamTrans routes.
- Ridership is high at the location.
- Funding is available for installation/maintenance (e.g. from partner agencies).
- Installation is coordinated with other applicable agencies.

If and when SamTrans is in a position to introduce a comprehensive, system-wide electronic signage program, new policies will be developed to ensure equitable siting.

ATTACHMENT 3 – EXISTING FARE CHART AND PROPOSED FARE STRUCTURE

Existing Fare Chart

	Local Fare				Express Fare		
	Cash or Mobile#	Clipper#	Day Pass (Cash or Mobile)	Monthly Pass (Clipper)	Cash or Mobile#	Clipper#	Monthly Pass (Clipper)
Adult (Age 19 through 64)	\$2.25	\$2.05	\$4.50	\$65.60	\$4.50	\$4.00	\$130.00
Youth* (Age 18 & younger)							
Eligible Discount** (Senior / Disabled / Medicare cardholder)	\$1.10	\$1.00	\$2.00	\$27.00	\$2.25	\$2.00	N/A

Local fares are paid on all routes that are not mentioned in the above fare chart.

Proposed Fare Structure - August 2021

Adopted – May 26, 1976

Revised – ~~November~~ August 4, 2021¹⁰

Effective – ~~November~~ August 4, 2021¹⁰

SAN MATEO COUNTY TRANSIT DISTRICT STATE OF CALIFORNIA

FARE STRUCTURE

I. FARE PRICES

Fixed-route Service

Product	Payment Options	Category	Current
Local One-way (2-hour transfer on Clipper and Mobile app)	Cash, Mobile app, Ticket/Token	Adult	\$2.25
		Youth/Eligible Discount	\$1.10
	Clipper	Adult	\$2.05
		Youth/Eligible Discount/ Adult Means-based	\$1.00
	Transfers from Other Agencies (Clipper) [^]	Adult/Youth/ Eligible Discount/ Adult Means-based	One free transfer
Local Day Pass	Cash, Mobile app	Adult	\$4.50
		Youth/Eligible Discount	\$2.00
Local Monthly Pass	Clipper, Limited Paper Ticket	Adult	\$65.60
		Youth/Eligible Discount	\$27.00
Express One-way (2-hour transfer on Clipper and Mobile app)	Cash, Mobile app	Adult	\$4.50
		Youth/Eligible Discount	\$2.25
	Clipper	Adult	\$4.00
		Youth/Eligible Discount/ Adult Means-based	\$2.00
	Transfer upgrade from One-way Local (Mobile), Day Pass (Paper/Mobile), Ticket/Token	Adult	\$2.25
		Youth/Eligible Discount	\$1.00
	Transfer upgrade from Local Monthly Pass (Clipper), Summer Youth Pass, One-way Local transfer (Clipper)	Adult	\$1.95
		Youth/Eligible Discount/ Adult Means-based	\$1.00
	Transfers from Other Agencies (Clipper) [^]	Adult	\$1.95
		Youth/Eligible Discount/ Adult Means-based	\$1.00
Express Monthly Pass	Clipper	Adult	\$130.00
		Youth/Eligible Discount*	

[^] Accepted Inter-agency transfers on Clipper: Caltrain Monthly Pass (2 or more zones), VTA Monthly Pass, Dumbarton Express 31-day Pass and AC Transit 31-day Pass

* Youth and Eligible Discount may purchase the Adult Express Monthly Pass by using an Adult Clipper card or may use a Youth or Eligible Discount Local Monthly Pass and pay an upgrade.

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Other Products

Product	Payment Options	Category	Current
Local One-way 10-Ticket Book	SamTrans Sales Outlets	Adult	\$22.50
		Youth	\$11.00
		Eligible Discount	\$11.00
Discounted Youth Local Monthly Pass	Limited Paper Pass thru School Lunch Program	Youth	\$22.00
Summer Youth Pass	Mobile app, www.samtrans.com, SamTrans Administrative Office	Youth	\$40.00
Way2Go Pass	<u>Pursuant to agreement with</u> SamTrans Administrative Office	<u>Minimum of 100</u> <u>passes</u> <u>Educational</u> <u>Institution</u>	<u>\$125 per rider</u> <u>35 per</u> <u>semester / \$70 per year</u> <u>(\$42,500 annual</u> <u>minimum)</u>
		<u>Employer</u>	<u>\$75 per year (\$2,500</u> <u>annual minimum)</u>
		<u>Residential Complex</u>	<u>\$40 per year (\$2,500</u> <u>annual minimum)</u>

Demand Response Services

Paratransit Redi-Wheels/RediCoast One-way (ADA)	Cash, Mobile app	Regular	\$4.25
		Lifeline	\$1.75
	10-Ticket Book available at SamTrans Administrative Office	Regular	\$42.50
		Lifeline	\$17.50
	Agency-sponsored Group Trips thru SamTrans Administrative Office	Regular	\$5.00 per rider
		Lifeline	\$2.25 per rider
Paratransit 5311 Coastsides On- demand One-way (non-ADA)	Cash, Mobile app	Regular	\$4.25
		Lifeline	\$1.75
	Agency-sponsored Group Trips thru SamTrans Administrative Office	Regular	\$4.50 per rider
		Lifeline	\$1.75 per rider
<u>Taxi Subsidy</u> <u>Pilot Program</u>	<u>Customer pays taxi company using</u> <u>credit card or cash</u>	<u>Eligible Discount</u>	<u>\$5.00</u>
Microtransit Pilot Program	Same as Local fixed-route	Adult/Youth/ Eligible Discount	Local fixed-route Fare Structure applies

Parking

Daily Parking at Colma Park and Ride	Cash, credit/debit card	\$3.00
Monthly Parking at Colma Park and Ride	www.samtrans.com, SamTrans Administrative Office	\$63.00

II. FIXED-ROUTE SERVICE FARE TYPES & CATEGORIES

A. Fare Types:

1. **Local One-way (with Transfers).** Available through Clipper®, the SamTrans mobile app, cash, Token or Ticket. Valid on Local service. Effective January 1, 2020, for customers using Clipper or SamTrans mobile app: includes free transfers on SamTrans Local service for 120 minutes.

2. **Local Day Pass.** Available through the SamTrans mobile app or cash. When purchased on-board, bus operator issues through the farebox. Valid on Local service from the time of activation at the farebox until 2:00 a.m. the next day.
3. **Local Monthly Pass.** Available through Clipper and limited paper passes distributed through Social Services agencies and schools. Valid on Local service from 12:01 a.m. on the first day of the month for which issued until 2:00 a.m. on the first day of the following month.
4. **Summer Youth Pass.** Available through the SamTrans mobile app or advance purchase at SamTrans Administrative Office. Valid for Local service during June, July and August. Effective January 1, 2020, Youth will pay upgrade when riding Express service.
5. **Discount Youth Local Monthly Pass.** Available through public school districts to qualified low-income students as identified through the school lunch program. Valid on Local service. Effective January 1, 2020, Youth will pay an upgrade when riding Express service.
6. **Express One-way.** Available through Clipper, SamTrans mobile app or cash. Customers using Clipper or SamTrans mobile app: includes free transfers for 120 minutes valid on Express and Local SamTrans services.
7. **Express Monthly Pass.** Available through Clipper only for Adult, Youth and Eligible Discount may use a Local Day Pass, Local Monthly Pass or Summer Youth Pass for Express service with payment of an Express Service Upgrade. Youth and Eligible Discount also may choose to purchase an Express Monthly Pass on an Adult Clipper card.
8. **Express Service Upgrade.** To pay for the difference between Local and Express fares. For use with: (i) 120-minute Local service transfers (Clipper and SamTrans mobile app); (ii) Tokens and Tickets; (iii) Local Day Passes; (iv) Local Monthly Passes; (v) Summer Youth Passes.
9. **Way2Go Pass.** Annual pass sold to (i) housing complexes for distribution to and use by all residents aged 5 years and older, and (ii) businesses for employees working more than 20 hours per week. Valid within the calendar year for which issued on Local, Out of San Francisco and Express service. Minimum participation cost based on 100 participants. Unlimited-ride pass available to educational institutions, employers, and residential complexes ("Organizations") for use on all SamTrans service within the calendar year or semester issued. Organizations must purchase for all eligible participants, defined as:
 - a. Educational Institutions: all full-time students, or other eligible sub-groups subject to SamTrans approval (e.g., designated low-income student groups)
 - b. Employers: all full-time employees, or other eligible sub-groups subject to SamTrans approval (e.g., employees who live in San Mateo County)
 - c. Residential complexes: all residents age 5 years or older

B. Fare Categories:

1. **Adult.** Applies to passengers aged nineteen (19) through sixty-four (64).
2. **Eligible Discount.** Available to passengers aged sixty-five (65) or older, or who possess a Regional Transit Connection (RTC) Discount Card, a Medicare Card, a current Disabled Person Placard Identification Card issued by the Department of Motor Vehicles, or a valid transit discount card issued by another California transit agency which is equivalent to the RTC Discount Card. Passengers carrying an RTC Discount Card marked with an attendant symbol may have a personal care attendant travel with them at the Eligible Discount fare.
3. **Youth.** Available to passengers who are eighteen (18) years old or younger. Up to two children aged four (4) years or younger may travel free with each Adult or Eligible Discount fare-paying passenger. Additional children are subject to the Youth fare.
4. **Means-based Fare Pilot Program.** ~~The SamTrans' participation in the~~ Regional Means-Based Fare Pilot Program (Clipper START Pilot Program), administered by the Metropolitan Transportation Commission, ~~will run for 12 months beginning~~ began in January 2021 ~~and will run through June 2023.~~

The Means-Based Fare is available only to participants who apply, are accepted and enroll in the Pilot Program. Participation is limited to adults aged 19 through 64, who are current residents in one of the nine San Francisco Bay Area counties, and who have an annual household income level at or below 200 percent of the Federal Poverty Level. ~~Once the Pilot Program launches,~~ information about the application process ~~will be posted~~ is posted on SamTrans' website at www.samtrans.com.

5. **Waived Fares.** Local, Out of San Francisco and Express Bus fares are waived for the following categories of passengers with proper identification or fare media:
 - a. **Peace Officers.** Uniformed and non-uniformed, sworn peace officers showing proper identification.
 - b. **Military Personnel.** Active military personnel in uniform showing proper identification.
 - c. **Employees/Retirees.** San Mateo County Transit District employees, qualified retirees, spouses, domestic partners and dependent children under the age of eighteen (18) showing their employee identification or family transportation pass.
 - d. **Board of Directors and Citizens Advisory Committee Members.** Board of Directors and Citizens Advisory Committee members showing their District identification.
 - e. **ADA Paratransit-eligible Passengers.** Passengers certified for Redi-Wheels and RediCoast (ADA) paratransit, and their personal care attendants, showing valid Redi-Wheels or RediCoast identification cards.

III. **ADA AND NON-ADA PARATRANSIT FARE TYPES & CATEGORIES**

ADA Paratransit Redi-Wheels and RediCoast, and non-ADA Paratransit 5311 Coastside Demand Response services require advanced reservations; service area restrictions apply.

A. ADA Paratransit: Redi-Wheels and RediCoast

1. **Regular Redi-Wheels and RediCoast.** For passengers with disabilities who (i) are certified by the District as eligible for paratransit under the ADA, and (ii) possess a valid Redi-Wheels or RediCoast card. Available through the SamTrans mobile app, cash or ticket. Tickets are sold in booklets with 10 rides at SamTrans Administrative Office and via mail.
2. **Lifeline Redi-Wheels and RediCoast.** For passengers with disabilities who (i) are certified by the District as eligible for paratransit under the ADA, (ii) possess a valid Redi-Wheels or RediCoast card, and (iii) receive Supplemental Security Income, San Mateo County General Assistance, or Medi-Cal. Available through the SamTrans mobile app, cash or ticket. Tickets are sold in booklets with 10 rides at SamTrans Administrative Office or via mail.
3. **Service Agency-sponsored Group Trips.** For passengers with disabilities who (i) are certified by the District as eligible for paratransit under the ADA, (ii) possess a valid Redi-Wheels or RediCoast card, and (iii) are participating in group trips sponsored by eligible agencies. Lifeline fares apply to such passengers who also receive Supplemental Security Income, San Mateo County General Assistance, or Medi-Cal. Eligible agencies are: Poplar Recare, Rosener House, San Carlos Adult Day Care, Senior Focus, Senior Day Care, South San Francisco Adult Day Care and Coastside Adult Day Health Care. Sponsor is billed by the District after the trip.

B. Non-ADA Paratransit: 5311 Coastside Demand Response

1. **Regular and Lifeline 5311 Coastside Demand Response.** For passengers living in the 5311 Coastside Service Area. Lifeline fares apply to such passengers who also receive Supplemental Security Income, San Mateo County General Assistance or Medi-Cal. Pay with cash or the SamTrans mobile app.
2. **Agency-sponsored Group Trips.** For passengers living in the 5311 Coastside Service Area who are participating in group trips sponsored by Senior Coastside. Lifeline fares apply to such passengers who also receive Supplemental Security Income, San Mateo County General Assistance or Medi-Cal. Sponsor is billed by the District after the trip.

IV. FARE PAYMENT

- A. **Cash Payment.** Cash payments are made by feeding bills or coins into the farebox. Bills up to \$20 (twenty dollars) and coins of one cent, five cents, 10 cents and 25 cents are accepted. No cash change is provided in case of overpayment. Through June 30, 2020, change may be provided in the form of Change Cards issued through the farebox.
- B. **Change Cards.** Change Cards may be used toward the cost of future fixed-route bus rides. Change Cards expire one year from date of issue and no later than June 30, 2021. Effective July 1, 2020, Change Cards will no longer be issued.

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- C. **Local One-way Token or Ticket.** Available to Adult and Youth as Tokens through June 30, 2020, and as Tickets effective July 1, 2020. Available to Eligible Discount as Tickets. Sold only in packages of 10. Each Token or Ticket is valid for one Local ride. Multiple Tokens or Tickets may be combined for Out of San Francisco or Express service (but no Change Card is provided). Tokens will be accepted on SamTrans buses through June 30, 2021 (after which point only Tickets will be accepted).
- D. **Clipper®.** Use of Clipper requires customers to “tag” the card at the Card Interface Device on-board buses. The Clipper card is a transit fare payment card issued and administered by the Metropolitan Transportation Commission (MTC) that is valid for use on all major public transit services throughout the San Francisco Bay Area. There may be fees associated with the use of a Clipper card. Such fees, if any, will be set by the MTC. Clipper customers will have an approximate 10 percent discount over One-way cash fares.
- E. **Mobile Ticketing Application Pilot Program.** Customers may purchase via the SamTrans Mobile App: (i) Local, Out of San Francisco and Express One-way; (ii) Local Day Pass; (iii) Express Upgrade; (iv) Paratransit Redi-Wheels/RediCoast One-way (ADA); and (v) Paratransit 5311 Coastside Demand Responsive One-way (non-ADA). Credit and debit cards are accepted.
- F. **Inter-agency Transfers**
Transfers from certain transit systems to SamTrans will receive one Local fare credit; available only on Clipper. Effective January 1, 2020, Upgrade will be charged for Express service.

AC Transit 31-day Ticket	Local Fare Credit within two hours of tagging Clipper on home system
Caltrain Monthly Pass, two or more zones	Local Fare Credit
DB (Dumbarton Express) 31-day Ticket	Local Fare Credit within two hours of tagging Clipper on home system
Santa Clara Valley Transportation Authority	Local Fare Credit within two hours of tagging Clipper on home system

- G. **Institutional Agreements.** The General Manager/CEO may enter into agreements with public and private institutions (including other public transit agencies) through which SamTrans is reimbursed for bus trips taken by defined groups of riders, provided the reimbursement rate is an existing price in the SamTrans Fare Structure.
- H. **Special Promotional Fares.** From time to time, the General Manager/CEO may authorize the establishment of special and promotional fares.

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- I. **Rules and Regulations.** All Passes, Tokens and Tickets are subject to District regulations as may be adopted from time to time. Misuse of a Pass, Token or Ticket or violation of the laws governing behavior on transit vehicles makes such Pass, Token or Ticket subject to revocation. Passes must be kept in the possession of the rider at all times. Assigned Passes may not be transferred to another individual.

Passes, Tokens, Tickets and Change Cards are not subject to refund or replacement.

The individual ride value of a Pass shall be valid for any route that has a fare for the specified ride value or less. The single-ride value of a Pass may be applied to the fare for any route with a higher individual ride value by paying the difference in cash, Tokens, Tickets or Change Cards. Fixed-route fare media are not valid on Paratransit service. District staff is empowered to add means of fare media distribution (e.g. website) without amendment of this document.

V. **SERVICE CLASSIFICATIONS**

A. **Local Service**

Transit routes of an intra-community or inter-community nature that operate primarily on local and arterial streets are classified as Local service. Local routes provide service at each established bus stop.

B. **Express Service**

Express service includes specialized routes of an inter-community nature that operate a significant portion of the route length along freeways without intermediate stops.

C. **ADA and non-ADA Paratransit Service**

1. **ADA Paratransit.** Service known as Redi-Wheels and RediCoast operates for certified passengers with disabilities traveling in the San Mateo County Transit District service area. Advance reservations are required, and certain qualifying and service area restrictions apply.

The Redi-Wheels service area includes the bayside of San Mateo County, portions of the City of Palo Alto north of Embarcadero Road, and the City of San Francisco in the Stonestown area and the Bayshore Corridor.

The RediCoast service area includes Montara, Moss Beach, El Granada, Princeton, Half Moon Bay, San Gregorio, La Honda, and Pescadero, with limited service to the bayside, San Francisco and Palo Alto.

Redi-Wheels and RediCoast customers are able to transfer to other paratransit providers in San Mateo County, San Francisco, Santa Clara County, and the East Bay at specified locations.

2. **Non-ADA Paratransit.** Service known as 5311 Coastside Demand
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Responsive service is available to customers living in Montara, Moss Beach, El Granada, Princeton, Half Moon Bay, San Gregorio, La Honda, and Pescadero, with limited service to the bayside of San Mateo County, portions of San Francisco and Palo Alto. Advance reservations are required, and certain qualifying and service area restrictions apply.

D. **Microtransit On-demand Pilot Program Service**

Microtransit is a demand-responsive service model offering flexible routing of transit vehicles to serve one or multiple trip requests within a defined service area. Passengers wishing to use microtransit may request a ride using a mobile app or by phone. The service is facilitated by a cloud-based platform that receives trip requests and dynamically routes the transit vehicle to serve the customers. Local fares apply.

F. **Taxi Subsidy Pilot Program**

~~The on-demand taxi subsidy pilot program offers same-day, curb-to-curb taxi and accessible taxi service at a reduced rate in the program area. The service is provided for adults aged 65 or older, and people with disabilities as defined in the program policies. The pilot program launched in August 2020 and is expected to run through April 30, 2021.~~

VI. **PARKING**

A. **Fees**

Parking is provided for a fee at the Colma Park and Ride lot on a per-day or monthly basis. Daily parking fees are payable at the parking payment machine. Monthly parking passes can be purchased at the SamTrans Administrative Offices or via www.samtrans.com. The General Manager/CEO may authorize the sale of "reserved" parking permits for a fee of up to \$105.00 per month.

B. **Restrictions**

The use of San Mateo County Transit District parking facilities shall be in accordance with District's Vehicle Parking Regulations and other rules.

ATTACHMENT 4 – AVERAGE FARE BY PAYMENT METHOD

Estimated Average Fare by Payment Method

Full Fare Rider	Avg Fare
Local - Cash / Token	\$2.25
Local - Clipper / Mobile	\$1.52
Local - Day Pass	\$1.44
Local - Monthly Pass	\$0.90
Express - Cash / Token	\$4.50
Express - Clipper / Mobile	\$2.97
Express - Monthly Pass	\$1.78
Average for Full Fare	\$1.51
Way2Go Pass	Avg Fare
Way2Go Pass – FY2019 Estimated	\$3.64
Systemwide	Avg Fare
Systemwide FY 2019 Actuals	\$1.38

ATTACHMENT 5 – STAKEHOLDER ENGAGEMENT: LIST OF ORGANIZATIONS SURVEYED & INTERVIEWED

Stakeholder Survey

A stakeholder survey was distributed to determine the needs and desires in a bulk pass program, and how the Way2Go pass program can be changed or improved to better fit the needs of stakeholders, both current participants and potential future participants. Stakeholders included employers, educational institutions, and real estate/residential developers.

A link to the survey was sent out to representatives of the following organizations:

Organization that received survey	Sector	Survey Completed?	Notes
Mid-Pen Housing	Residential/Real Estate Developer	Y	
Eden Housing	Residential/Real Estate Developer	Y	
Housing Leadership Council	Residential/Real Estate Developer		
HIP Housing	Residential/Real Estate Developer		
CA Apartment Association	Residential/Real Estate Developer		They posted to their website https://caanet.org/samtrans-invites-landlords-to-take-survey-on-bulk-pass-program/
EPA Can Do	Residential/Real Estate Developer		
Lesley Senior Communities	Residential/Real Estate Developer		
Mercy Housing	Residential/Real Estate Developer		
BRIDGE Housing	Residential/Real Estate Developer		
Sares Regis Group	Residential/Real Estate Developer	Y	
San Mateo Community College District	Educational institution	Y	

Stanford University	Employer/ Educational Institution	Y	
Stanford Health Care	Employer	Y	
Kaiser	Employer		
Google	Employer	Y	
Facebook	Employer		
San Francisco Airport	Employer		
San Mateo County Economic Development Association (SAMCEDA)	Employer		They distributed survey to their members via email
Linkedin	Employer	Y	
Costco	Employer		

The stakeholder survey received complete responses from eight stakeholders.

Stakeholder Follow-Up Interviews

Follow-up interviews were conducted with six of the organizations that completed the survey:

- San Mateo County Community College District (SMCCCD)
- Stanford University
- Google
- Stanford Health Care
- Eden Housing
- MidPen Housing

Findings

The feedback received on the Way2Go Pass program is summarized below. Overall, stakeholders appeared captivated and interested in working with SamTrans to devise a new Way2Go Pass program that is more responsive to their needs.

- Flexibility is key. Each stakeholder is different and has unique needs. Structuring a flexible program that can accommodate these diverse needs will help to reduce barriers to program participation.
- Compared with other programs these agencies do or have participated in, the per pass cost is very high and can box out nonprofit housing developers and others working with limited budgets. Developing pricing structures that allow for lower per pass costs would open the program up to more participants.
- The current participants only participate in the Way2Go Pass program because it is a TDM requirement for them. Working to get this requirement in to more developments would help to increase participation.
- Overall, stakeholders responded positively to tiered pricing structures, and appreciated the flexibility to only enroll a portion of their employees/residents/students. They noted that post-

billing options were interesting, but many stakeholders noted that they prefer to have price certainty so the cost can be worked into annual budgets.

- Many employees/students/residents do not both live and work in San Mateo County. Purchasing passes for the percentage of people who live in SamTrans service area would be beneficial, or providing a larger regional pass that involves multiple transit agencies.
- Multiple stakeholders noted that access to a data dashboard would be very useful so they can make data-driven decisions regarding program participation. This data can also help to justify continued use of the program.
- Improvements should be coupled with high-quality, convenient transit service.

Overall, the stakeholders identified three key factors that would encourage program participation: affordability, flexibility, and connectivity. To address these factors, the proposed changes reduce the price of the pass and allow for flexibility in terms of how organizations define their pool of eligible participants. To address connectivity, SamTrans will continue to engage stakeholders in Reimagine SamTrans to design a bus network that meets their needs.

ATTACHMENT 6 – PUBLIC COMMENTS RECEIVED

SamTrans July Board Meeting, Comments on Way2Go Pass

Molly Naber– Assoc. Director of Development, MidPen Housing

Mid-Pen is 5-year-old non-profit affordable housing provider and developer based in Foster City and we operate 110 Communities throughout the Bay Area. San Mateo is one of the core properties where we have 34 homes in operation and provide 1600 homes for more than 3200 individuals. Our San Mateo Pipeline for new development includes 10 properties and over 1500 homes

We currently provide Way2Go Passes at 3 out of our 34 existing San Mateo County Properties and we anticipate providing passes at an equivalent of 3 of our 10 new developments. In our experience providing the Way2Go Passes, we found that some of our residents are super users such as school age residences. Some of our residents do not use the passes at all. We are very supportive of the proposed changes in the structure of the Way2GoPass Program to reduce the minimum per property and per resident cost and we view the benefits as following: The lower cost will allow us to consider an added resident amenity for our existing properties with a fixed budget we evaluate on a project by project basis in collaboration with our asset management and property management partners, and the lower cost will also allow us to consider the program as an added resident amenity for new developments. Currently, we are only underwriting the program where it's mandated by finance resources or local jurisdictions. The lower cost will be makes it very appealing and more feasible to expand to other Mid Pen communities where we view the Way2Go Pass as a useful tool to minimize vehicle use, parking demand and promoting sustainable transit

Thank you.

Hayden Miller

Good Afternoon, my name is Hayden Miller

SamTrans has really great job with ClipperSTART promotion. I ride a lot of the Bay Area Transit agencies and none of them have come close to what SamTrans has done...really great program being promoted and grow with extension of pilot program.

Excited for Way2Go Program. Had not heard of it before today and sounds like a great way to get more people in transit and hope to more support and great programs. Hope you will support.

From: Weijia Song <Weijia.Song@edenhousing.org>
Sent: Wednesday, July 7, 2021 2:55 PM
To: Public Comment <PublicComment@samtrans.com>
Subject: SamTrans Board of Directors Meeting 7/7/2021 - Public Comment Submission

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Hello,

I am writing to provide public comment on 9.C.3 and 13.A - proposed changes to the SamTrans Way-2-Go Program in the case I am not able to make my comment orally at the board meeting today.

"Good Afternoon, my name is Weijia Song a Senior project developer at Eden Housing. On behalf of Eden, one of the oldest non-profit affordable housing developers operating in California, I would like to voice our support of the proposed fare program changes to the Way2Go Program. In 2019 Eden partnered with SamTrans and the City of East Palo Alto and secured a 20M grant from State HCD to fund the construction of new affordable housing units at Light Tree Apartments as well as a plethora of transit improvements throughout San Mateo County. We committed as part of the grant to provide transit passes to all residents, the proposed changes to the way to go program would allow Eden to continue these passes beyond the lifetime of the grant. We all know the importance and need to build more affordable and supportive housing in California, being able to partner with Samtrans and provide low-income families with housing in tandem with access to high quality transit helps connect residents with employment and education opportunities across the peninsula that will create more sustainable communities. Thank you to the Samtrans staff who developed the comprehensive changes to the Way2Go Program and hope that the board will support the changes proposed today."

Thank you,
Weijia



Weijia Song
Senior Project Developer
22645 Grand Street Hayward, CA 94541
Office 510-247-8176 | **Cell** 415-670-9655
Weijia.Song@edenhousing.org | edenhousing.org

Eden Housing creates and sustains high-quality affordable housing communities that advance equity and opportunity for all.