Metropolitan Transportation Commission (MTC)
Network Management Business Case Update

FEBRUARY 23, 2022
Bay Area Transit Transformation Action Plan

Unanimous approval by the Blue Ribbon Transit Recovery Task Force in July 2021

Plan identifies 27 near-term actions related to five key outcomes

• Fares and payment
• Customer information
• Transit network
• Accessibility
• Funding

Following the adoption of the Plan, MTC has undertaken three key efforts related to regional transit coordination & governance:

• Network Management Business Case
• Regional Rail Partnerships Grant
• Resolution 3866 Update
Transit Coordination & Governance
Network Management Business Case

• Purpose
  • Evaluate the benefits, costs, and risks of transit network management alternatives
  • Present rationale for preferred solution (the ‘business case’ for making a change)

• Alternatives
  • Alternatives developed in summer 2021 are starting point
  • Expect additions, refinements or variants
  • Options defined against two axes/spectrums:
    • Management (collaborative) to Manager (higher authority)
    • Independent/Operator-based to within MTC

• Advisory group:
  • 14-member group: Seven transit general managers, MTC executive director, and six key stakeholders
  • Guide and review analysis and recommendations, provide periodic updates to Commission
Refined Operator Alternative: TNM Executive Board

• Mission
  • Act as a centralized forum and coordinating body for regional transit policy development and network management to improve customer experience, advance equity, and increase transit ridership.

Objectives
• Provide structured coordination on regional transit planning
• Implement the Transformation Action Plan
• Realize immediate benefits in response to urgent needs related to growing ridership, addressing the climate emergency, improving mobility, and ensuring equitable outcomes.
• Develop, advance and implement longer-term initiatives in areas of responsibility
• Improve transit network effectiveness and efficiencies
Refined Operator Alternative: TNM Executive Board

• Association of transit operator general managers and MTC, with expertise of their local agencies, riders, and boards
  • Leverages existing governance structures, authorities and accountabilities
  • Technical skills of experienced staff
  • Work can advance immediately

• Decision-making and implementation
  • Existing transit agency boards retain their authorities
  • Consensus based recommendations confirmed by majority executive vote
  • Decisions advance to MTC or transit agency boards as appropriate
    - MTC: Regional policy and funding
    - Agency boards: Agency policy and funding (including fares, major changes to service, agency budget impacts and/or allocation of agency funds)
Transit Coordination & Governance
Network Management Business Case

Refined Operator Alternative: TNM Executive Board

- TNM Executive Board collaborative process
  - Lay groundwork with adopting bodies
  - Incorporate technical expertise
  - Engage diverse perspectives
    - **Advisory Council**: Formal venue for stakeholder participation & to advise on key issues, concerns
    - Subcommittees/Technical Advisory Groups established as needed

- Public transparency and reporting
  - Quarterly or biannual report on status to MTC and agency board meetings as needed
  - Regular public meetings
Transit Coordination & Governance
Regional Rail Partnerships Study

• Led by MTC in partnership with rail providers and key regional stakeholders
• Project to identify **project delivery** and **governance structures** to build and operate a more seamless and customer focused rail network
• Accelerated schedule to complete by June 2022
• Objectives
  • Assess project delivery structures and partnerships for specific major rail projects over the next 10 years
  • Assess how different rail corridor governance/management models impact delivery of an integrated regional rail network and identify board governance and management models
  • Serve as a resource for on-going rail governance conversations and feed into the network management business case
Transit Coordination & Governance
MTC Resolution 3866

- **Resolution 3866**
  - Establishes MTC’s Transit Coordination Implementation Plan (last updated 2015)
  - Transit agencies must comply as a condition for MTC administered transit funding

- **MTC considering an update of Resolution 3866 by summer 2022 for Transformation Action Plan implementation that would:***
  - Establish MTC and operator commitments
  - Strengthen and clarify MTC’s authority to advance action plan implementation
    - Fare integration: Mutual accountability for implementation of recommendations
    - Mapping and wayfinding: Set milestones and cost-sharing expectations
    - Schedule coordination: Currently, no requirements included
  - May also revisit existing topics
    - Transit hub optimization
    - Real time transit information
    - Accessibility programs and Clipper®
2022 Look Ahead

Ongoing Operator Coordination

Regional Transit Network Business Case
- Scoping, Existing conditions & alternative refinement – Jan-Mar
- Alternative analysis and identify/recommend preferred alternative and next steps – Apr-Jul
- Commission action on preferred alternative – Sep

Resolution 3866 Update
- Identify topics for update – Jan
- Consultation with transit operators – Feb/Mar
- Amend Res 3866 (Operations Committee/Commission) – Apr/May

Regional Rail Partnership
- Existing conditions/ key factors – Jan
- Define delivery, governance & management structures – Spring
- Final report – June

MTC Led: Transit Coordination and Governance

OCT 2022
NOV 2022
DEC 2022
Caltrain Engagement

Caltrain is closely engaged with these MTC-led efforts

- Seated on MTC Network Advisory Committee
- Seated on Rail Partnerships Technical Advisory Committee
- Weekly meetings of operator General Managers
- Regular discussions with MTC staff

Next Steps

- Continue monthly written updates to JPB on MTC initiatives and programs related to regional coordination and governance
- Plan subsequent focused updates to WPLP and JPB to seek policy feedback as MTC’s work progresses and key information or decisions are contemplated
- Discuss Board priorities for coming year and approach to resourcing and structuring Caltrain involvement in regional governance discussions as part of Board’s planned March 21st workshop