



Agenda Item No. 5

METROPOLITAN
TRANSPORTATION
COMMISSION

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Memorandum

TO: Operations Committee

DATE: September 2, 2011

FR: Executive Director

RE: Clipper[®] Title VI Summary Report

Background

In February 2010, MTC adopted Resolution No. 3866. This resolution mandated that those transit agencies participating in Clipper[®] would need to transition pre-paid paper fare media to be Clipper[®]-only. After its adoption, staff came before this Committee recommending that the Commission retain a consultant to conduct an assessment of the Title VI impacts of each of these fare media transitions. The firm of Milligan and Company (sub-consulting to Booz Allen Hamilton) was selected to perform this assessment.

Beginning in May 2010, Milligan worked closely with the five transit operators for which fare media transitions were specified in Res. 3866 – AC Transit, BART, Caltrain, GGBHTD, and SFMTA – to gather demographic data and relevant information about their various fare products. Milligan also relied on MTC data on original transit passengers in preparing its assessment. Milligan divided the 30 fare products analyzed as part of this process into 17 assessment reports. Once the individual reports were completed, staff consolidated them into a Summary Report and added a discussion on regional issues. The draft Summary Report is attached to this memorandum for your information (Attachment 1).

Additional Assessments

Staff is commencing the Title VI impact analysis of the upcoming fare media transitions for SamTrans and VTA. Samtrans is scheduled to complete its fare media transitions by December 31, 2011, so assessment for its fare media are expected to be completed shortly.

Ensuring Equitable Access to Clipper

MTC and transit agency staff have undertaken a number of initiatives to ensure that Title VI-protected persons have equitable access to Clipper program benefits and services:

- **Customer Education** – Conducted multiple and ongoing media campaigns in Chinese and Spanish advertising venues and vehicles.
- **Outreach** – Held over 800 outreach events in coordination with the transit operators, as well as worked with Community Based Organizations to identify specific community needs.
- **Customer Service** – Enhanced multi-lingual capabilities at the Clipper Service Bureau.

- **Card Distribution** – Offered incentives to the Clipper Contractor and re-evaluated the Clipper vendor network to ensure sufficient coverage in communities of predominately low-income and minority residents.
- **Card fee** – The \$5 card fee has been waived since June 2010.

Key Findings and MTC Mitigation Activities

As shown in Table 1, six of the 30 fare media transition analyses conducted by Milligan yielded findings of potential disparate impact on persons protected by Title VI. These findings were based on demographic data indicating that minority and low-income patrons use these six fare products at a disproportionately higher rate compared to non-minority and higher income patrons, and therefore are more severely impacted by any effect of their transition to Clipper-only availability.

Table 1 lists the 30 fare products and the potential disparate impacts associated with transitioning the six fare products, as well as specific mitigation actions MTC and the transit operators have undertaken to address these impacts. The Summary Report discusses these findings and MTC's initiatives to ensure equitable access to Clipper.

Conclusion and Next Steps

MTC and the transit operators have taken a number of steps to ensure that Clipper is accessible to all Bay Area transit patrons and MTC staff will continue to work on the following:

- Continue outreach and customer education, with a multi-lingual, multi-cultural emphasis
- Conduct ongoing analysis and discussions with the Clipper Contractor to adjust locations of Clipper vendors and other distributors
- Revise the card fee policy to mitigate impacts on low-income and minority customers, while addressing Clipper® operational needs.
- Seek input from MTC's Policy Advisory Council on the Report findings and outstanding activities related to the card fee and vendor locations and possible approaches for public participation.

MTC staff is ready to release this Summary Report for public comment. Staff will return to this Committee by the end of the calendar year with a summary of public input and any recommended changes, along with a summary of the assessments for Samtrans and VTA. Recommended changes for the card fee policy, as a revision to the Clipper® Operating Rules, also will be brought back to this Committee for approval.

Steve Heminger

SH:MC

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Table 1: Fare Media Transitions, Title VI Assessment Findings, and MTC Mitigations

Date of Transition	Fare Media No Longer Issued/Accepted	Potential Disparate Impact?	Recommended Mitigation	MTC Action
AC Transit				
7/31/2010	31-day paper youth ticket	Yes – Insufficient youth outreach & enrollment locations	More targeted outreach & additional locations accepting youth applications	Supporting and funding extensive AC Transit youth outreach and enrollment activities
12/31/2010	31-day paper adult ticket	Yes – Vendor deficiency in 1 location and \$5 card fee	1 additional Clipper vendor; elimination of \$5 card fee	Added 2 Clipper vendors; MTC proposes reducing card fee to \$3 with a \$2 minimum load
12/31/2010	10-ride paper ticket (Adult)	No	N/A	N/A
12/31/2010	10-ride paper ticket (Y/S/D)	No	N/A	N/A
BART				
12/15/2010	EZ Rider smart card as transit payment	No	N/A	N/A
12/31/2011	High Value Discount magnetic stripe tickets	No	N/A	N/A
12/31/2011	Senior (green) magnetic stripe ticket	No	N/A	N/A
12/31/2011	Youth & disabled (red) magnetic stripe ticket	No	N/A	N/A
Caltrain				
1/31/2011	Full fare 8-ride paper ticket	No	N/A	N/A
1/31/2011	Discounted 8-ride paper ticket	No	N/A	N/A
3/1/2011	Full fare paper monthly pass	No	N/A	N/A
3/1/2011	Discounted paper monthly pass	No	N/A	N/A
3/1/2011	Caltrain + Muni paper monthly pass	No	N/A	N/A
TBD	Paper Go Pass	No	N/A	N/A
GGBHTD				
8/1/2010	\$25.00 Transit Value Card	No	N/A	N/A
8/1/2010	\$50.00 Transit Value Card	No	N/A	N/A
8/1/2010	\$75.00 Transit Value Card	No	N/A	N/A
SFMTA				
4/15/2010	Golden Gate Ferry paper two-way transfer	No	N/A	N/A

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Date of Transition	Fare Media No Longer Issued/Accepted	Potential Disparate Impact?	Recommended Mitigation	MTC Action
4/30/2010	Adult Single Ride paper Ticket Book (10 rides)	No	N/A	N/A
10/4/2010	BART to Muni paper two-way transfer	No	N/A	N/A
11/1/2010	Adult Muni/BART paper Fast Pass	No	N/A	N/A
2/1/2011	Disabled Monthly Sticker	Yes – Vendor deficiency in 2 locations	2 additional Clipper vendors	Offered incentive to Contractor to add 2 vendors in impacted communities
4/1/2011	Adult Muni-only paper Fast Pass	No	N/A	N/A
6/1/2011	Paper Senior Pass	No	N/A	N/A
8/1/2011	Paper Youth Pass	Yes – Insufficient enrollment locations and vendor deficiency in 2 locations	Additional locations accepting youth applications; 2 additional Clipper vendors	Support and funding for SFMTA-led outreach and enrollment activities; Offered incentive to Contractor to add 2 vendors in impacted communities
TBD	BART/Daly City paper two-way transfer	Yes - \$5 card fee	Elimination of \$5 card fee or retention of transfer machines	Transition has not occurred - in discussions with SFMTA; MTC proposes reducing card fee to \$3 with a \$2 minimum load policy
TBD	Adult Single Ride Token	No	N/A	N/A
TBD	1-day, 3-day, and 7-day paper Passports	No	N/A	N/A
TBD	Paper bus transfers	Yes – Vendor deficiency, low accessibility to fare media and \$5 card fee	Retention of paper transfer; elimination of card fee; addition of Clipper vendors in several areas; expanded distribution of limited use tickets	Transition has not occurred - in discussions with SFMTA
TBD	Paper ADA transfers	No	N/A	N/A