



## **MARIN COUNTY TRANSIT DISTRICT BOARD OF DIRECTORS**

Board of Supervisors Chambers, Room 330  
3501 Civic Center Drive, San Rafael, CA 94903

### **AGENDA**

Monday, July 1, 2019

#### **10:00 a.m. Convene as the Marin County Transit District Board of Directors**

1. Open Time for Public Expression (limited to three minutes per speaker on items not on the Transit District's agenda)
2. Board of Directors' Matters
3. General Manager's Report
  - a. General Manager's Oral Report
  - b. Monthly Monitoring Report for April
4. Consent Calendar
  - a. Minutes for June 3, 2019
  - b. Extend Fixed Route Service Agreement with Golden Gate Bridge, Highway & Transportation District for the First Option Year
  - c. Award of Five-Year Contract for Fixed Route Scheduling Software Services to Optibus for an amount not to exceed \$178,200
  - d. Agreement with West Marin Senior Services for Services to Support Marin Access Programs in West Marin County
  - e. Disadvantaged Business Enterprise Participation (DBE) Goal Methodology for Marin Transit Contracting Opportunities in Federal Fiscal Years 2020-22
  - f. Fiscal Year 2018/19 Contract Awards and Fiscal 2019/20 Contracting Opportunities  
**Recommended Action: Approve.**
5. Response to Civil Grand Jury report "SMART First/Last Mile Options"  
**Recommended Action: Authorize the Board President to forward the attached response to Marin County Civil Grand Jury Report, "SMART First Mile/Last Mile Options."**

(continued)

6. Marin Transit Connect One-Year Evaluation Report  
**Recommended Action: Accept report.**
7. Overview of Marin Transit Fares and Fare Policies  
**Recommended Action: Information only.**

### **Adjourn**



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711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
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July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: General Manager Report – Monthly Report: April 2019**

Dear Board Members:

**board of directors**

damon connolly  
president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
director  
supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

**RECOMMENDATION:** This is a recurring information item.

**SUMMARY:** The attached monthly report provides an overview of Marin Transit operations for the monthly period ending April 30, 2019. The monthly reports summarize statistics on the performance of Marin Transit services and customer comments.

Overall ridership in April 2019 increased by 5.0 percent compared to April 2018. Ridership on fixed-route services increased by 4.7 percent compared to the same month last year. Ridership on Marin Access services increased by 10.6 percent. Ridership on yellow bus services decreased by 5.2 percent.

Additional detailed analyses of system performance and trends are provided in separate quarterly and annual reports, including route-level statistics and financials. These reports are available on the District's website at <http://marintransit.org/monitoringreports.html>.

**FISCAL/STAFFING IMPACT:** None associated with this report.

Respectfully submitted,

Nancy Whelan  
General Manager

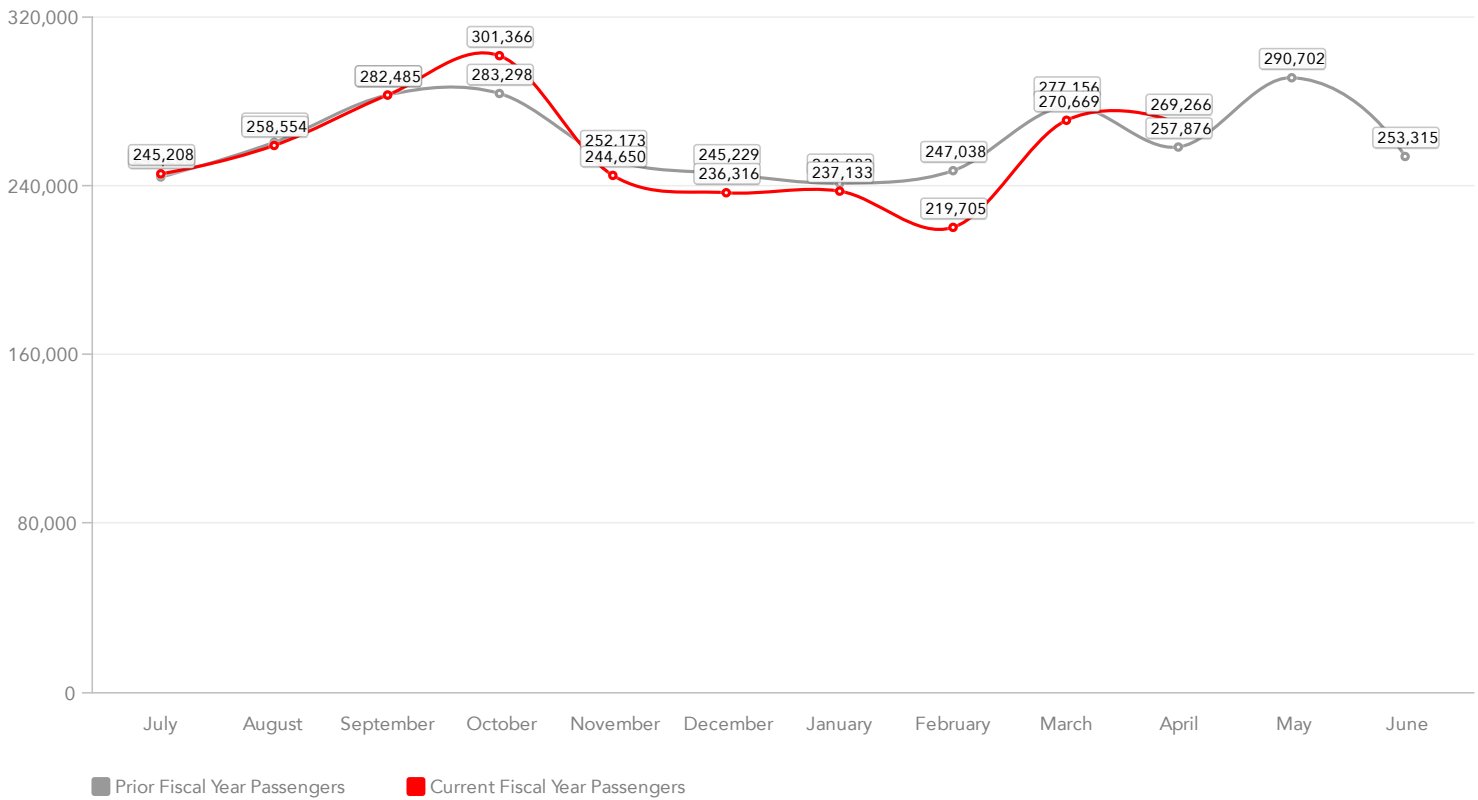
Attachments

FISCAL YEAR

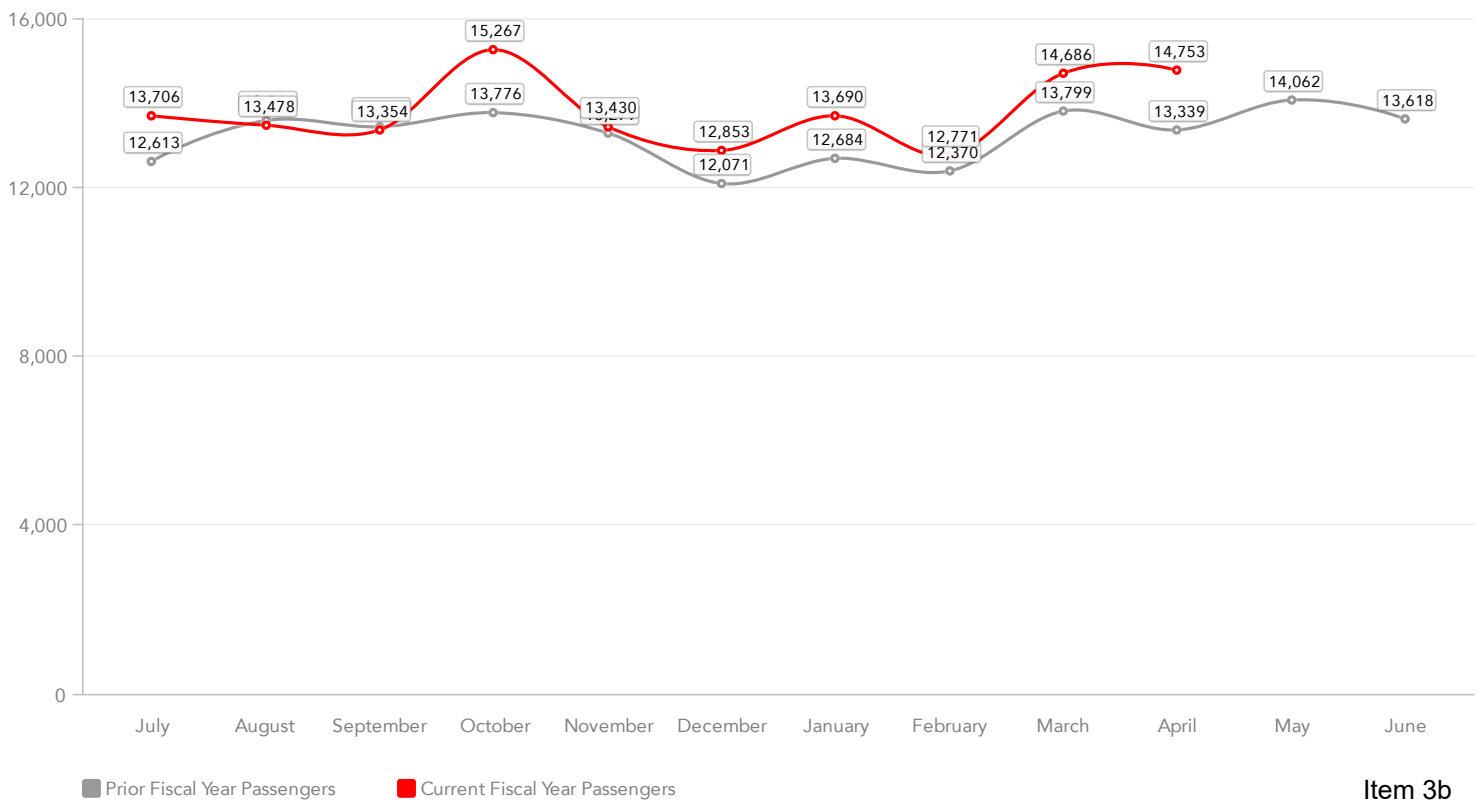
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## Year-to-Date Ridership Trends

Fixed-Route Passengers (incl. Yellow Bus) by Month



Demand Response Passengers by Month



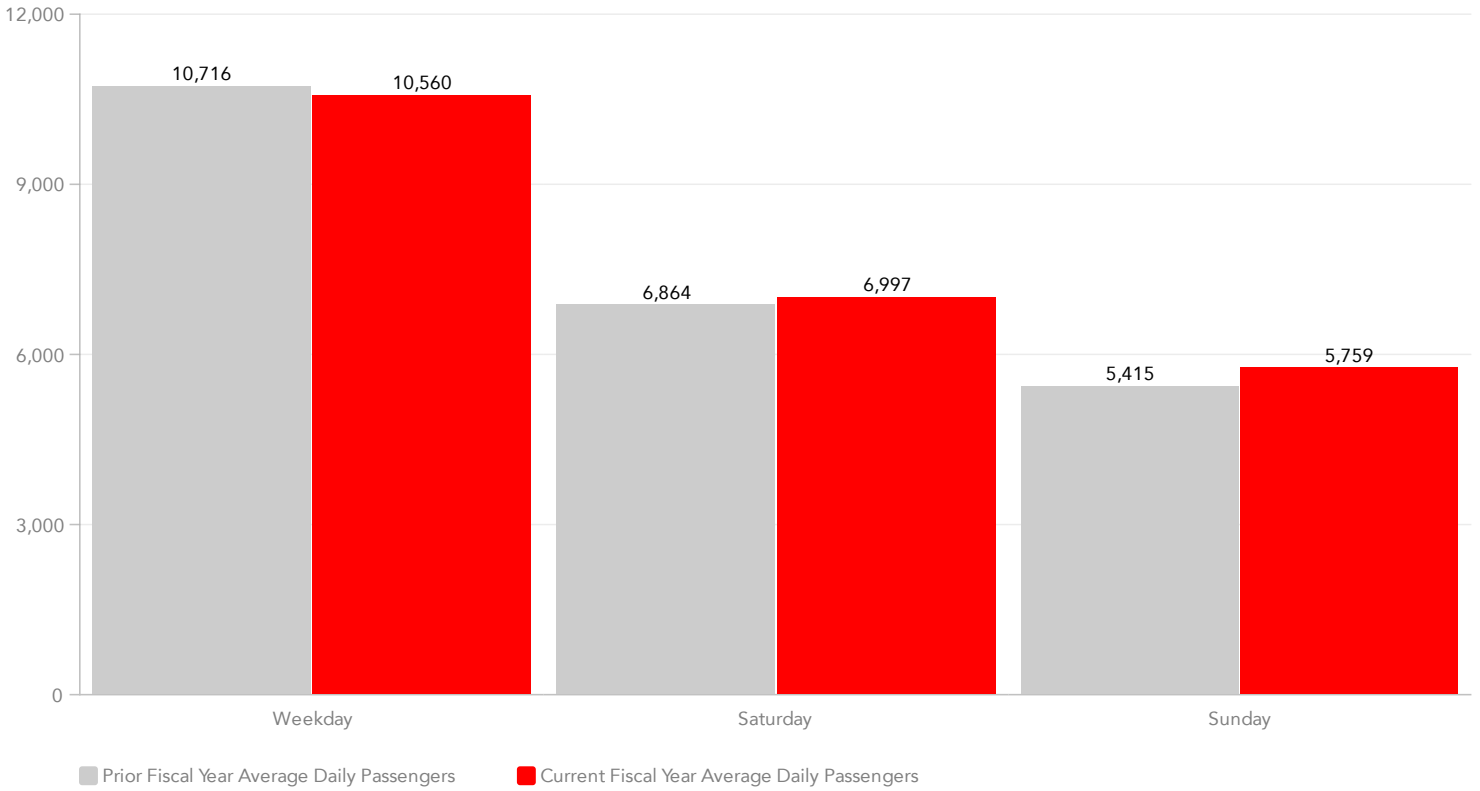


# Monthly Statistics

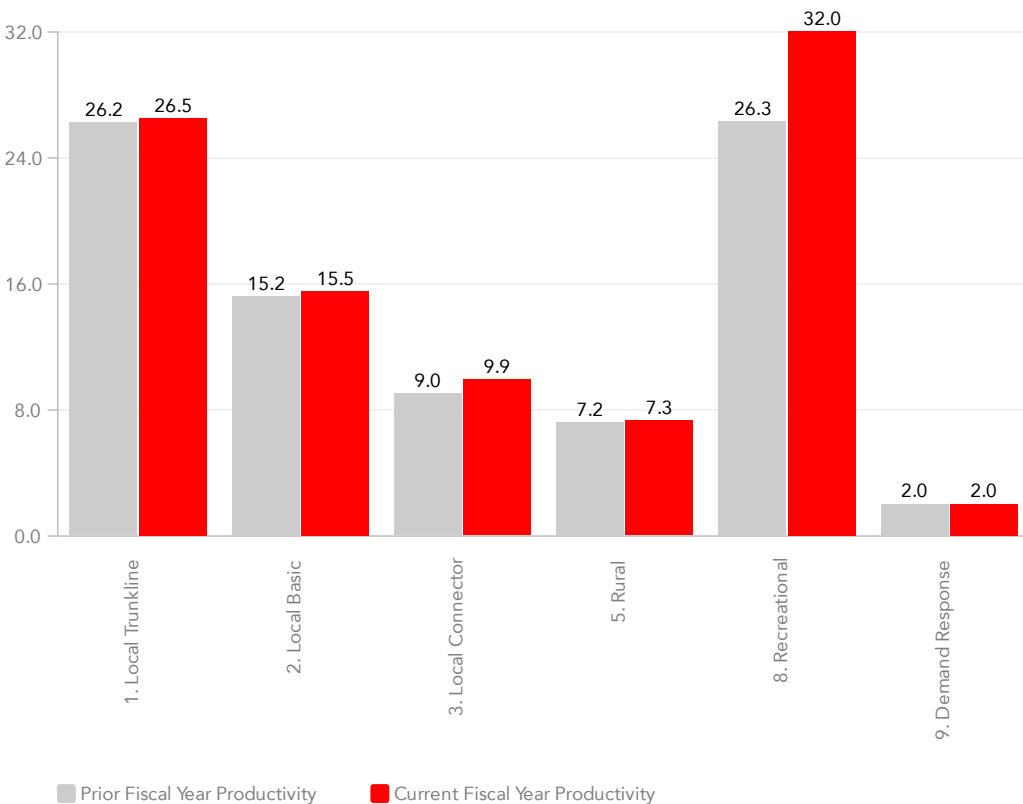
MONTH

April

Average Systemwide Daily Passengers



Productivity (pax/hr) by Typology



**Route Typologies**

- 1. Local Trunkline:  
Routes 35, 36, 71X
- 2. Local Basic:  
Routes 17, 22, 23, 23X, 29, 49
- 3. Local Connector:  
Routes 219, 228, 233, 245, 251, 257
- 5. Rural:  
Routes 61, 68
- 8. Recreational:  
Routes 66/66F
- 9. Demand Response:  
Local Paratransit, Novato Dial-A-Ride, Rural Dial-A-Ride



Month: April 2019		Program							Total
Category	Fixed-Route Local	Fixed-Route Shuttle	Stagecoach & Muir Woods	Supplemental & Yellow Bus	Demand Response	Mobility Management	Systemwide		
<b>Commendation</b>	1	0	0	0	10	0	0	11	
<b>Service Delivery Complaint</b>	24	12	5	4	5	0	1	51	
Accessibility	2	1	0	0	0	0	0	3	
Driver Conduct Complaint	7	2	2	1	1	0	0	13	
Driving Complaint	6	1	2	0	4	0	1	14	
Early Trip	2	1	1	0	0	0	0	4	
Equipment Issue	0	0	0	0	0	0	0	0	
Farebox	0	0	0	0	0	0	0	0	
Late Trip	1	0	0	0	0	0	0	1	
Missed Connection	0	0	0	0	0	0	0	0	
Missed Trip	0	0	0	0	0	0	0	0	
No-Show	1	2	0	0	0	0	0	3	
Off-Route	0	0	0	1	0	0	0	1	
Pass-Up Complaint	5	5	0	2	0	0	0	12	
<b>Service Structure Complaint</b>	1	0	1	1	0	0	0	3	
Bus Stop Improvement Request	0	0	0	0	0	0	0	0	
Fares	0	0	0	0	0	0	0	0	
Other Complaint	0	0	0	0	0	0	0	0	
Scheduling Complaint	0	0	1	0	0	0	0	1	
Service Improvement Suggestion	1	0	0	1	0	0	0	2	
<b>Safety Complaint</b>	0	0	0	0	0	0	0	0	
<b>Total Service Hours</b>	9,079	3,547	1,745	935	6,156	-	23,029	23,029	
Commendations per 1,000 Hours	0.1	0.0	0.0	0.0	1.6	-	0.0	0.5	
Complaints per 1,000 Hours	2.8	3.4	3.4	5.4	0.8	-	0.0	2.3	
<b>Total Passengers</b>	181,371	35,209	22,143	31,259	12,381	2372	284,735	284,735	
Commendations per 1,000 Passenger	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	
Complaints per 1,000 Passengers	0.1	0.3	0.3	0.2	0.4	0.0	0.0	0.2	

## REGULAR MEETING OF THE MARIN COUNTY TRANSIT DISTRICT BOARD OF DIRECTORS

Held Monday, June 3, 2019 at 10:00 A.M.

### Roll Call

**Present:** President Connolly, Vice President Rodoni, Second Vice President Colin, Director Moulton-Peters, Director Sears

**Absent:** Director Arnold, Director Rice

**President Connolly opened the meeting at 10:02 A.M.**

1. [Open Time for Public Expression \(limited to three minutes speaker on items not on the Transit District's agenda\)](#)

President Connolly asked if any member of the public wished to speak. Seeing none he called for Board of Directors' Matters.

2. [Board of Directors' Matters](#)

President Connolly asked if any member of the Board wished to speak. Seeing none he called for the General Manager's Report.

3. [General Manager's Report](#)

#### Staff Report

- a. [General Manager's Oral Report](#)
- b. [Monthly Monitoring Report for March](#)

General Manager Nancy Whelan reported that the Civil Grand Jury released their SMART First and Last Mile Connections Report on May 9<sup>th</sup>. Their recommendations primarily focus on expanding Marin Transit Connect service to serve additional SMART stations. The Grand Jury requires Marin Transit to respond to four of the five recommendations in the report. Staff will provide a recommended response at the next Board meeting.

Ms. Whelan reported that the Transportation Authority of Marin (TAM) recently issued a draft Measure AA strategic plan. The TAM Board will consider approval of the plan on June 27. Marin Transit provided a letter to TAM with comments on the draft plan on May 23<sup>rd</sup>. Staff will update the comment letter to provide more specific comments regarding Measure AA reserve funds.

Ms. Whelan reported that overall ridership in March 2019 decreased by 1.9 percent compared to March 2018. Ridership on fixed-route services decreased by 1.8 percent compared to the same month last year. Ridership on Marin Access

services increased by 6.4 percent, and ridership on yellow bus services decreased by 12.4 percent.

The quarterly performance report from January through March is on the consent calendar. Rainy weather during this period had the most significant impact on ridership, especially for the Muir Woods shuttle. Ms. Whelan noted that the quarterly performance report is missing revenue hours and operating costs for the Hidden Valley School yellow bus routes. The corrected version is posted on the Marin Transit website with the quarterly reports.

4. [Consent Calendar](#)

Staff asked to pull Item 4d from the Consent Calendar for a presentation on the status of the bus stop improvements. The Board agreed to hear the presentation and vote on Item 4d separately.

- a. [Minutes for May 6, 2019](#)
- b. [Marin Transit Third Quarter Financial Report FY 2018/19](#)
- c. [Marin Transit Third Quarter Performance Report FY 2018/19](#)
- d. [Amendment to Agreement with Coastside Concrete for Bus Stop Improvements](#)
- e. [Contract with Mill Valley Refuse Service, Inc. for Portable Toilet Rental and Cleaning Services](#)
- f. [Marin Transit Passenger Code of Conduct](#)
- g. [Authorizing Resolution and Project List for State of Good Repair Program](#)

**Recommended Action: Approve.**

**Director Kate Sears made a motion to approve remaining Consent items. Director Stephanie Moulton-Peters seconded the motion.**

M/s: Director Sears - Director Moulton-Peters

Ayes: President Connolly, Vice President Rodoni, Second Vice President Colin, Director Moulton-Peters

Noes: None

Absent: Director Arnold, Director Rice

Senior Capital Analyst Anna Penoyar reported on the State of Good Repair Bus Stop Improvements Project (Item 4d). She requested that the Board authorize the General Manager to execute change orders with Coastside Concrete and Construction Inc (Coastside) for up to \$25,000 in additional contract costs to complete improvements at two locations and provide contingency funds to address project delays.

Director Stephanie Moulton-Peters expressed her appreciation for the improved stops.

**Vice President Rodoni made a motion to approve Item 4d.  
Director Kate Sears seconded the motion.**

M/s: Vice President Rodoni - Director Sears

Ayes: President Connolly, Vice President Rodoni, Second Vice President Colin, Director Moulton-Peters

Noes: None

Absent: Director Arnold, Director Rice

5. [Marin County Transit District Final Operating and Capital Budget for FY 2019/20](#)

[Staff Report](#)

Director of Finance & Capital Programs Lauren Gradia presented the proposed final operations and capital budget for FY 2019/20 with the following changes from the draft budget:

- Reduced Marin Transit Connect fare revenue to better match FY 2018/19 estimated actuals, and increased Measure AA budget expenditure to cover expenses;
- Reduced Measure A/AA FY 2019/20 Budget Revenues for Sub strategy 1.2 Rural by \$73,359, based on the lower available amount from TAM. The budget programs property tax revenue to offset this reduction in Measure AA revenue;
- Reduced Measure A/AA FY 2019/20 Budget Revenues for Sub strategy 1.3, Marin Access by \$38,541, based on the lower available amount from TAM. The budget programs property tax revenue offset this reduction in revenue; and
- Added \$30,000 of Measure AA funding to the Ross Valley yellow school bus program, and reduced the expected yellow bus fare revenue by \$30,000, based on the Board's action at the May meeting.

Director Kate Sears clarified that staff is concerned that it is unnecessary for TAM to make additional reserve deductions from Marin Transit's Measure AA funds as Marin Transit already has a reserve policy.

General Manager Nancy Whelan stated that Marin Transit will have two areas of concern:

- TAM's establishment of a reserve; and
- Marin Transit's FY 2019-20 budget assumes that TAM will return \$3.2 million in previous Measure A reserves to Marin Transit. TAM staff have confirmed that return though Marin Transit has not received an official notification.

Director Stephanie Moulton-Peters noted that with respect to the reserve policy the TAM Board has stated that although TAM has not differentiated funds that way previously, there is no explicit prohibition from doing that.

Vice President Rodoni suggested that the reserve could be reduced to 2.5 percent and extended for ten years and this would build the reserve over a longer period with less immediate impact.

**Recommended Action: Approve FY 2019/20 budget.**

M/s: Director Moulton-Peters - Director Sears

Ayes: President Connolly, Vice President Rodoni, Second Vice President Colin, Director Moulton-Peters

Noes: None

Absent: Director Arnold, Director Rice

6. [Funding Agreements for Yellow School Bus Programs](#)

[Staff Report](#)

Senior Operations Analyst Kelly Zalewski requested that the Board authorize the General Manager to execute agreements with five recipients of Measure AA funds to support existing yellow bus programs.

Director Stephanie Moulton-Peters requested that staff develop a best practices sheet for Yellow School Bus Contracting in order to facilitate the best delivery of school bus services among the eligible districts. Ms. Moulton-Peters also requested that staff provide data about Yellow School Bus service for the Ross Valley as well as other school districts as part of the monthly monitoring reports.

Director Kate Colin asked how the fund allocation for the Yellow School Bus program compares to what was approved by the voters. Ms. Colin also asked about the primary cost drivers of the Yellow School Bus program. Ms. Zalewski answered that contractor rates vary significantly as some contractors have unions or are employee-owned. She noted that the largest cost variable for these programs is the different contract rates. Districts have incorporated new features, such as apps, that increase the base price.

The Dixie School District hires their own bus drivers and they own a parking facility, and their program costs are not comparable to those of school districts that contract for buses and drivers. General Manager Nancy Whelan stated that Marin Transit is required to spend five percent of its Measure AA

allocation on school transportation. Marin Transit accomplishes this in a variety of ways to meet and exceed the expenditure requirement. Marin Transit provides:

- A Youth Pass Program that subsidizes income-qualified riders with a free or reduced-cost passes;
- Fixed route supplemental school services that primarily serves high schools;
- \$1.325 million to the five school districts and an additional \$100,000 due the high demand for these services.

Ms. Whelan noted that staff continues to seek opportunities for additional funding. Staff also continue to search for a dedicated parking facility to help reduce contract and leasing costs. A dedicated facility will enable more competition for services in Marin and increase service reliability.

**Recommended Action: Authorize the General Manager to execute agreements with the five recipients of Measure AA funds to support existing yellow bus programs.**

M/s: Director Moulton-Peters - Director Sears

Ayes: President Connolly, Vice President Rodoni, Second Vice President Colin, Director Moulton-Peters

Noes: None

Absent: Director Arnold, Director Rice

**Adjourn** President Connolly adjourned the meeting at 10:39 A.M.

SINE DIE

\_\_\_\_\_  
PRESIDENT

ATTEST:

\_\_\_\_\_  
CLERK



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

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president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
director  
supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Extend Fixed Route Service Agreement with Golden Gate Bridge, Highway & Transportation District for the First Option Year**

Dear Board Members:

**RECOMMENDATION:** Approve the contract extension with the Golden Gate Bridge, Highway & Transportation District (GGBHTD) through June 30, 2021 by exercising the first option year.

**SUMMARY:** Marin Transit's current contract for Operations and Maintenance of local fixed route bus service with GGBHTD began on July 1, 2015. The term of the contract is five years with two additional option years. The base contract is scheduled to expire on June 30, 2020. Per section 104.C.1 of the Operations and Maintenance contract, Marin Transit shall notify the Bridge District at least 350 calendar days prior to the end of the last year of the Base Contract Term if we intend to exercise the first option year.

Staff recommends approving the contract extension for this additional year and extending the term of the contract until June 30, 2021. The draft letter to GGBHTD confirming the contract extension is provided as an attachment to this report.

Marin Transit's upcoming Short Range Transit Plan will determine projected service levels for routes operated under this agreement during FY 2020/21. In FY 2019/20, Marin Transit's anticipated annual levels of service will be between 78,000 and 83,000 hours.

**FISCAL/STAFFING IMPACT:** The cost of the contract to GGBHTD is included in Marin Transit's annual budget in the Local Service budget. The contract allows for a 2.7 percent annual escalation. Rates for FY 2020/21 are \$125.67 per revenue hour, as shown in the table below.



<b>Contract Year</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Option 1</b>	<b>Option 2</b>
Fiscal Year	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22
Cost per Revenue Hour	\$110.00	\$112.97	\$116.02	\$119.15	\$122.37	\$125.67	\$129.07

There is no staffing impact associated with this item.

Respectfully submitted,



Robert Betts  
 Director of Operations and Planning

Attachment:

1. Letter to GGBHTD: Intent to Extend Contract into Option Year One



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Tony Clark  
Director of Schedules and Service Development  
Golden Gate Bridge, Highway & Transportation District  
1011 Andersen Drive  
San Rafael, CA 94901

**RE: Intent to Extend Agreement into Option Year One**

Dear Mr. Clark,

**board of directors**

damon connolly  
president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
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city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

Per section 104.C.1 of our Operations and Maintenance contract, Marin Transit shall notify the Bridge District at least 350 calendar days prior to the end of the last year of the Base Contract Term if we intend to exercise the option years. Please accept this letter as notification of Marin Transit's desire to extend our Operations and Maintenance Contract into the first option year, FY 2020-21.

We do not foresee any significant changes to our contracted service levels in FY 2019/20 and anticipate annual levels to remain between 78,000 and 83,000 hours. Our upcoming Short Range Transit Plan will provide further detail on projected service levels for routes operated under this agreement. This effort will provide additional clarity on future changes that may impact the contracted amount of annual service. We expect this exercise will be ongoing until Fall 2019, and we invite you and your staff to participate.

We value our longstanding partnership and look forward to continuing our agreement into the final year of our Base agreement and the first option year. Please feel free to contact me with questions or comments.

Sincerely,

Robert Betts  
Director of Operations & Planning

cc: Nancy Whelan, General Manager  
Lauren Gradia, Director of Finance and Capital Projects  
Mona Babauta, Deputy General Manager, Golden Gate Transit



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July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Award of Five-Year Contract for Fixed Route Scheduling Software Services to Optibus for an amount not to exceed \$178,200**

Dear Board Members:

**RECOMMENDATION:** Authorize General Manager to 1) Negotiate and execute a software license agreement with Optibus for fixed route scheduling software and 2) Issue purchase orders for annual maintenance fees to support Optibus fixed route scheduling software and 3) approve budget amendment 20-01.

**SUMMARY:** Currently, Marin Transit uses several software applications to plan, develop, and maintain fixed route schedules. The different tools each provide a specific functionality and are limited in scope. With this procurement, Marin Transit will consolidate the functionalities of these software suites into one central software package.

**HISTORY:** In 2014, Marin Transit issued a Request for Proposals for Scheduling Software services for the first time in the District's history. Up to that point, staff developed schedules manually using a combination of basic spreadsheet and database tools. As service expanded, staff identified the need to contract for a robust scheduling software program. Three firms submitted proposals for the 2014 procurement and staff selected the Master Scheduler application from Schedule Masters, Inc due to its competitive price and comprehensive functionality.

The contract with Schedule Masters was a five-year agreement that recently concluded. On May 14, 2019, staff issued a request for scheduling software to capture additional planning and operations

functions related to schedule development and maintenance in a comprehensive software package.

**PURPOSE:** Scheduling software is necessary for Marin Transit for a variety of reasons including ongoing communication of schedule information to our contractors. Customers also consume schedule information through various means, most of which are maintained separately. These include the District's website, online maps, printed brochures, bus stop blades, and rider panels.

In addition to the District's own use, there are a variety of external needs for this data that can be more efficiently met by a streamlined software application. These external needs are necessary anytime a major or minor adjustment is made to a schedule and include:

- **MTC's 511:** Marin Transit participates in the regional 511 program and is responsible for feeding both static and real-time schedule information to this regional system. This information is then disseminated throughout the Bay Area to both local and regional transit users. The Metropolitan Transportation Commission (MTC) requires this data to meet their system specifications, which have continually evolved.
- **Daily Operations:** Marin Transit supplies its contractors with various reports and data needed to support ongoing operations, including assignments of vehicles and drivers.
- **Syncromatics:** Marin Transit's Automatic Vehicle Location (AVL) system requires planned schedule data in a specific format to be imported in order to support real-time predictions.
- **TransTrack:** Marin Transit's internal data management system requires planned service metrics to be put into the system in order to calculate statistics required for regular reporting including and those required by the Federal Transit Administration as part of the District's National Transit Database reporting.
- **Google Transit:** Google has become a valuable resource for customer trip planning. Google requires schedule data to be submitted in a format known as the General Transit Feed Specification (GTFS).
- **Third-Party Developers:** Many software companies and independent developers today are creating their own transit applications and often request data for use in their projects.

A significant amount of staff resources are dedicated to support both internal and external needs for schedule data, develop custom data feeds, and provide ongoing maintenance. The purchase of scheduling software will reduce the amount of staff resources necessary to maintain and update scheduling data. It will also ensure the stability and integrity of the data as the District's services evolve. The advanced algorithms in these types of software can optimize driver and vehicle resources while ensuring that labor work rules and capacity needs are met. The software will also provide the District with greater flexibility that will enable staff to respond to necessary scheduling adjustments or service requests in a more timely manner.

**PROCUREMENT PROCESS:** On May 14, 2019, Marin Transit issued a Request for Proposals for Scheduling Software for Fixed Route Services. Questions were due on May 21, 2019 and

staff issued one addendum on May 24, 2019 with answers to the questions. Proposals were due by 3:00 pm PST on June 4, 2019. At the time of the deadline, seven proposals had been received. Staff scored all seven proposals to determine a shortlist of four finalists who were invited to show a product demonstration and answer questions on June 10 and 11.

The following basic functionality was requested for scheduling applications:

- Management and development of schedules, including the ability to build and modify from a database of route patterns, stops, and timetables.
- The ability to assign garage, routes, and certain vehicle types to specific contractors and specific routes while using logic or parameters that respect these assignments.
- The ability to assign headsign codes to route patterns.
- Visual mapping interface where users can define and view routes, stops, relief points, break points, and garage locations.
- The ability to export feeds for third-party app developers and online trip planning tools, including General Transit Feed Specifications (GTFS) and the Bay Area's Regional 511 data manager.
- The ability to export schedule, block, and runcut operational inputs needed to support the District's AVL system (provided by GMV Syncromatics).
- A reporting and statistics module that includes block and runcut metrics such as total distance, revenue distance, total hours, revenue hours, pull out and pull in time, total number of buses required, and other efficiency measurements. These metrics should be reportable for the system as a whole and by route.
- Easy to read, detailed, printable and exportable stop lists, patterns, blocks, rosters, timetables, headsign codes, driver turn sheets (lefts and rights) and employee lists in Excel format and editable Word formats. Submittal of examples is highly desirable.

Five Marin Transit staff members from Operations and Planning participated in the interview panel. They scored the proposals and interviews for each of the four final firms on the following categories:

- Responsiveness to the RFP
- Technical ability
- Initial set up and integration with existing programs/systems
- Ease of use
- Reporting
- Training
- Project implementation
- Ability to perform
- Client references
- Cost

**RECOMMENDATION:** The panel conducted a comprehensive review of the software applications and submitted quotes. Staff recommends that your Board authorize the General Manager to negotiate and execute a software license agreement with Optibus for fixed route

scheduling software and issue purchase orders for annual software maintenance fees. The term of the agreement will be five years.

Optibus software is used in more than 300 cities worldwide and has excellent references from Nassau InterCounty Express, MV Transportation, and Keolis. The tool will provide flexibility for Marin Transit to create and modify routes and build optimal schedules. The solution is a cloud-based software as a service (SaaS) platform that staff can access from any standard internet browser. A suite of standard reports will provide staff with all necessary exportable data to share with contractors and external data feeds.

Optibus will lead staff through an initial weeklong onsite training workshop, in addition to an online training course. Full implementation of the program is expected to be completed within two months.

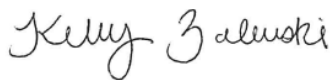
The annual fee schedule is listed below. The fees were determined based on the maximum number of vehicles Marin Transit places in service (54) multiplied by a monthly fee per vehicle (\$55.00). This determines the monthly fee of \$2,970, or \$35,640 annually. There is no escalator associated with the fees, and the fees will not increase if the maximum number of vehicles operated by Marin Transit changes.

**Table 1: Pricing for Fixed Route Scheduling Software Services**

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
<b>Annual Fee</b>	\$35,640	\$35,640	\$35,640	\$35,640	\$35,640	\$178,200

**FISCAL/STAFFING IMPACT:** The cost of the scheduling software is included in Marin Transit’s FY 2019/20 budget under Local Service. The amount included in the original budget was \$30,000 in FY 2019/20. The actual cost to the District will be \$35,640 and staff is requesting Board approval of budget adjustment 20-01 to recognize this change. There is no staffing impact.

Respectfully submitted,



Kelly Zalewski  
Senior Operations Analyst



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Agreement with West Marin Senior Services for Services to Support Marin Access Programs in West Marin County**

Dear Board Members:

**board of directors**

damon connolly  
president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
director  
supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

**RECOMMENDATION:** Authorize General Manager to execute an agreement between Marin County Transit District and West Marin Senior Services for services to support Marin Access programs in West Marin at a cost not to exceed \$16,400 for the initial one-year term.

**SUMMARY:** In 2011, Marin Transit contracted with West Marin Senior Services (WMSS) to operate a volunteer driver program (TRIP) serving rural west Marin County. TRIP was primarily designed to reimburse mileage expenses for riders who find their own volunteer drivers. In some cases, WMSS worked with the riders to match them with a suitable driver. The contract for administering this program expired on June 30, 2016.

In 2016, Marin Transit completed a Senior Mobility Study that included an assessment of Marin Access programs and awarded a comprehensive Travel Navigator contract. These activities provided an opportunity for Marin Transit and WMSS staff to re-evaluate their services for seniors and people with disabilities in West Marin. The partners worked together to reallocate funding and program responsibilities to best meet the needs of these residents.

In July 2016, Marin Transit adjusted the programs serving west Marin County and shifted responsibilities for program administration to the Travel Navigator team. Marin Transit also entered into an agreement with WMSS to continue to provide support for Marin Access programs including marketing and driver matching service for TRIP. The initial agreement was for a one-year term to pilot this new role for WMSS. In 2017 and 2018, Marin Transit amended the contract to authorize two additional one-year terms. As amended, the contract expires on June 30, 2019.

Staff requests your Board’s approval for a new agreement with West Marin Senior Services to provide marketing and outreach services and driver matching services, as detailed below.

**Marketing and Outreach**

Under the agreement, WMSS will:

- Work to inform West Marin seniors senior about the availability of Marin Access volunteer drivers, travel navigators, West Marin Stagecoach, and shuttle programs.
- Host travel navigators and facilitate their interactions with residents at community events.
- Advertise and recruit riders for Marin Access shuttle programs.

**Driver Matching Services**

WMSS will continue to match suitable drivers with community members enrolled in the volunteer driver program who are not able to provide their own drivers. WMSS will be responsible for background checks on drivers and will provide Marin Transit with monthly reports detailing the number of round-trip matches provided.


WMSS has continued to demonstrate the positive impact of these services, and staff is seeking to ease the administrative burden of single-year contracts. Staff recommends that your Board authorize the General Manager to execute a one-year contract with WMSS for continued support of Marin Access programs in West Marin with the ability to exercise up to four additional option years. Exercise of the option years will be contingent on your Board’s approval of the annual Marin Transit operating budget.

**FISCAL/STAFFING IMPACT:** The total cost for this agreement with West Marin Senior Services will not exceed \$16,400 for the initial one-year term. Compensation for the services will be based on a monthly fixed fee of \$500 for marketing and outreach and a fee per ride match of \$20 per round trip. If the parties choose to exercise the option years, the annual cost will remain the same.

**Table 1: Pricing for West Marin Senior Services to Support Marin Access Programs in West Marin County**

	Marketing & Outreach	Driver Matching Services	Annual Not to Exceed
<b>FY 19/20</b>	\$6,000	\$10,400	\$ 16,400
<b>Option Years</b>			
<b>FY 20/21</b>	\$6,000	\$10,400	\$ 16,400
<b>FY 21/22</b>	\$6,000	\$10,400	\$ 16,400
<b>FY 22/23</b>	\$6,000	\$10,400	\$ 16,400
<b>FY 23/24</b>	\$6,000	\$10,400	\$ 16,400

Respectfully submitted,



Joanna Huitt  
Mobility Planner

Attachment: #192001 West Marin Senior Services Support for Marin Access Programs



Contract Log #192001  
**MARIN COUNTY TRANSIT DISTRICT  
 PROFESSIONAL SERVICES CONTRACT**

**THIS CONTRACT** is made and entered into this 1st day of July 2019, by and between the MARIN COUNTY TRANSIT DISTRICT, hereinafter referred to as "District" and West Marin Senior Services, hereinafter referred to as "Contractor."

**RECITALS:**

**WHEREAS**, District desires to retain a person or firm to provide the following service: support for Marin Access programs in west Marin County; and

**WHEREAS**, Contractor warrants that it is qualified and competent to render the aforesaid services;

**NOW, THEREFORE**, for and in consideration of the Contract made, and the payments to be made by District, the parties agree to the following:

**1. SCOPE OF SERVICES:**

Contractor agrees to provide all of the services described in **Exhibit A** attached hereto and by this reference made a part hereof.

**2. FURNISHED SERVICES:**

The District agrees to:

- A. Guarantee access to and make provisions for the Contractor to enter upon public and private lands as required to perform their work.
- B. Make available all pertinent data and records for review.
- C. Provide general bid and Contract forms and special provisions format when needed.

**3. FEES AND PAYMENT SCHEDULE:**

The fees and payment schedule for furnishing services under this Contract shall be based on the rate schedule which is attached hereto as **Exhibit B** and by this reference incorporated herein. Said fees shall remain in effect for the entire term of the Contract. Contractor shall provide District with his/her/its Federal Tax I.D. number prior to submitting the first invoice.

**4. MAXIMUM COST TO DISTRICT:**

In no event will the cost to District for the services to be provided herein exceed the maximum sum of **\$16,400** including direct non-salary expenses. As set forth in section 14 of this Contract, should the funding source for this Contract be reduced, Contractor agrees that this maximum cost to District may be amended by written notice from District to reflect that reduction.

**5. TIME OF CONTRACT:**

This Contract shall commence on July 1, 2019, and shall terminate on June 30, 2020 with four additional option years. Certificate(s) of Insurance must be current on day Contract commences and if scheduled to lapse prior to termination date, must be automatically updated before final payment may be made to Contractor. The final invoice must be submitted within 30 days of completion of the stated scope of services.

**6. INSURANCE:**

Commercial General Liability:

The Contractor shall maintain a commercial general liability insurance policy in the amount of \$1,000,000 (\$2,000,000 aggregate). The District shall be named as an additional insured on the commercial general liability policy.

Commercial Automobile Liability:

Where the services to be provided under this Contract involve or require the use of any type of vehicle by Contractor, Contractor shall provide comprehensive business or commercial automobile liability coverage, including non-owned and hired automobile liability, in the amount of \$1,000,000.00.

Workers' Compensation:

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance, a letter of self-insurance, or a copy of the Certificate of Consent to Self-Insure shall be provided to the District prior to commencement of work.

Errors and Omissions, Professional Liability or Malpractice Insurance.

Contractor may be required to carry errors and omissions, professional liability or malpractice insurance.

All policies shall remain in force through the life of this Contract and shall be payable on a "per occurrence" basis unless District specifically consents to a "claims made" basis. The insurer shall supply District adequate proof of insurance and/or a certificate of insurance evidencing coverages and limits prior to commencement of work. Should any of the required insurance policies in this Contract be cancelled or non-renewed, it is the Contractor's duty to notify the District immediately upon receipt of the notice of cancellation or non-renewal.

If Contractor does not carry a required insurance coverage and/or does not meet the required limits, the coverage limits and deductibles shall be set forth on a waiver, **Exhibit C**, attached hereto.

Failure to provide and maintain the insurance required by this Contract will constitute a material breach of this Contract. In addition to any other available remedies, District may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

**7. ANTI DISCRIMINATION AND ANTI HARASSMENT:**

Contractor and/or any subcontractor shall not unlawfully discriminate against or harass any individual including, but not limited to, any employee or volunteer of the Marin County Transit District based on race, color, religion, nationality, sex, sexual orientation, age or condition of disability. Contractor and/or any subcontractor understands and agrees that Contractor and/or any subcontractor is bound by and will comply with the anti discrimination and anti harassment mandates of all Federal, State and local statutes, regulations and ordinances.

**8. SUBCONTRACTING:**

The Contractor shall not subcontract nor assign any portion of the work required by this Contract without prior written approval of the District except for any subcontract work identified herein. If Contractor hires a subcontractor under this Contract, Contractor shall require subcontractor to provide and maintain insurance coverage(s) identical to what is required of Contractor under this Contract and shall require subcontractor to name Contractor and Marin County Transit District as an additional insured under this Contract for general liability. It shall be Contractor's responsibility to collect and maintain current evidence of insurance provided by its subcontractors and shall forward to the District evidence of same.

**9. ASSIGNMENT:**

The rights, responsibilities and duties under this Contract are personal to the Contractor and may not be transferred or assigned without the express prior written consent of the District.

**10. LICENSING AND PERMITS:**

The Contractor shall maintain the appropriate licenses throughout the life of this Contract. Contractor shall also obtain any and all permits which might be required by the work to be performed herein.

**11. BOOKS OF RECORD AND AUDIT PROVISION:**

Contractor shall maintain on a current basis complete books and records relating to this Contract. Such records shall include, but not be limited to, documents supporting all bids, all income and all expenditures. The books and records shall be original entry books with a general ledger itemizing all debits and credits for the work on this Contract. In addition, Contractor shall maintain detailed payroll records including all subsistence, travel and field expenses, and canceled checks, receipts and invoices for all items. These documents and records shall be retained for at least five years from the completion of this Contract. Contractor will permit District to audit all books, accounts or records relating to this Contract or all books, accounts or records of any business entities controlled by Contractor who participated in this Contract in any way. Any audit may be conducted on Contractor's premises or, at District's option, Contractor shall provide all books and records within a maximum of fifteen (15) days upon receipt of written notice from District. Contractor shall refund any monies erroneously charged.

**12. WORK PRODUCT/PRE-EXISTING WORK PRODUCT OF CONTRACTOR:**

Any and all work product resulting from this Contract is commissioned by the Marin County Transit District as a work for hire. The Marin County Transit District shall be considered, for all purposes, the author of the work product and shall have all rights of authorship to the work, including, but not limited to, the exclusive right to use, publish, reproduce, copy and make derivative use of, the work product or otherwise grant others limited rights to use the work product.

To the extent Contractor incorporates into the work product any pre-existing work product owned by Contractor, Contractor hereby acknowledges and agrees that ownership of such work product shall be transferred to the Marin County Transit District.

**13. TERMINATION:**

- A. If the Contractor fails to provide in any manner the services required under this Contract or otherwise fails to comply with the terms of this Contract or violates any ordinance, regulation or other law which applies to its performance herein, the District may terminate this Contract by giving five (5) calendar days written notice to the party involved.
- B. The Contractor shall be excused for failure to perform services herein if such services are prevented by acts of God, strikes, labor disputes or other forces over which the Contractor has no control.
- C. Either party hereto may terminate this Contract for any reason by giving thirty (30) calendar days written notice to the other parties. Notice of termination shall be by written notice to the other parties and be sent by registered mail.
- D. In the event of termination not the fault of the Contractor, the Contractor shall be paid for services performed to the date of termination in accordance with the terms of this Contract so long as proof of required insurance is provided for the periods covered in the Contract or Amendment(s).

**14. APPROPRIATIONS:**

The District's performance and obligation to pay under this Contract is contingent upon an annual appropriation by the Marin County Transit District Board of Directors, the State of California or other third party. Should the funds not be appropriated District may terminate this Contract with respect to those payments for which such funds are not appropriated. District will give Contractor thirty (30) days'

written notice of such termination. All obligations of District to make payments after the termination date will cease.

Where the funding source for this Contract is contingent upon an annual appropriation or grant from the Marin County Transit District Board of Directors, the State of California or other third party, District's performance and obligation to pay under this Contract is limited by the availability of those funds. Should the funding source for this Contract be eliminated or reduced, upon written notice to Contractor, District may reduce the Maximum Cost to District identified in section 4 to reflect that elimination or reduction.

**15. RELATIONSHIP BETWEEN THE PARTIES:**

It is expressly understood that in the performance of the services herein, the Contractor, and the agents and employees thereof, shall act in an independent capacity and as an independent Contractor and not as officers, employees or agents of the District. Contractor shall be solely responsible to pay all required taxes, including but not limited to, all withholding social security, and workers' compensation.

**16. AMENDMENT:**

This Contract may be amended or modified only by written Contract of all parties.

**17. ASSIGNMENT OF PERSONNEL:**

The Contractor shall not substitute any personnel for those specifically named in its proposal unless personnel with substantially equal or better qualifications and experience are provided, acceptable to District, as is evidenced in writing.

**18. JURISDICTION AND VENUE:**

This Contract shall be construed in accordance with the laws of the State of California and the parties hereto agree that venue shall be in Marin County, California.

**19. INDEMNIFICATION:**

Contractor agrees to indemnify, defend, and hold District, its employees, officers, and agents, harmless from any and all liabilities including, but not limited to, litigation costs and attorney's fees arising from any and all claims and losses to anyone who may be injured or damaged by reason of Contractor's negligence, recklessness or willful misconduct in the performance of this Contract.

**20. COMPLIANCE WITH APPLICABLE LAWS:**

The Contractor shall comply with any and all Federal, State and local laws and resolutions: including, but not limited to the County of Marin Nuclear Free Zone and Living Wage Ordinance Copies of any of the above-referenced local laws and resolutions may be secured from the Contract Manager referenced in section 21. In addition, the following NOTICES may apply:

1. Pursuant to California Franchise Tax Board regulations, District will automatically withhold 7% from all payments made to vendors who are non-residents of California.
2. Contractor agrees to meet all applicable program access and physical accessibility requirements under State and Federal laws as may apply to services, programs or activities for the benefit of the public.
3. For Contracts involving any Federal Transit Administration grant funds, Exhibit D must be attached. Exhibit D provides all Federal Transit Administration Contract Provisions relevant to this Contract.

- 4. For Contracts involving any State or Federal grant funds, Exhibit E must be attached. Exhibit E shall consist of the printout results obtained by search of the System for Award Management at [www.sam.gov](http://www.sam.gov).

**Exhibit E - Debarment Certification**

**By signing and submitting this Contract, the Contractor is agreeing to abide by the debarment requirements as set out below.**

- The certification in this clause is a material representation of fact relied upon by District.
- The Contractor shall provide immediate written notice to District if at any time the Contractor learns that its certification was erroneous or has become erroneous by reason of changed circumstances.
- Contractor certifies that none of its principals, affiliates, agents, representatives or contractors are excluded, disqualified or ineligible for the award of contracts by any Federal agency and Contractor further certifies to the best of its knowledge and belief, that it and its principals:
  - Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal Department or Agency;
  - Have not been convicted within the preceding three-years of any of the offenses listed in 2 CFR 180.800(a) or had a civil judgment rendered against it for one of those offenses within that time period;
  - Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or Local) with commission of any of the offenses listed in 2 CFR 180.800(a);
  - Have not had one or more public transactions (Federal, State, or Local) terminated within the preceding three-years for cause or default.
- The Contractor agrees by signing this Contract that it will not knowingly enter into any subcontract or covered transaction with a person who is proposed for debarment, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction.
- Any subcontractor will provide a debarment certification that includes the debarment clause as noted in preceding bullets above, without modification.

**21. NOTICES:**

This Contract shall be managed and administered on District’s behalf by the Department Contract Manager named below. All invoices shall be submitted and approved by this Department and all notices shall be given to District at the following location:

Contract Manager:	Joanna Huitt
Dept./Location:	711 Grand Avenue, Suite 110 San Rafael, CA 94901
Telephone No.:	415.226.0871

Notices shall be given to Contractor at the following address:

Contractor: West Marin Senior Services

Address: P.O. Box 791  
Pt. Reyes Station, CA 94956

Telephone No.: 415-663-8148

**22. ACKNOWLEDGEMENT OF EXHIBITS**

*Check applicable Exhibits*

**CONTRACTOR'S  
INITIALS**

<b><u>EXHIBIT A.</u></b>	<input checked="" type="checkbox"/> <b>Scope of Services</b>	
<b><u>EXHIBIT B.</u></b>	<input checked="" type="checkbox"/> <b>Fees and Payment</b>	
<b><u>EXHIBIT C.</u></b>	<input type="checkbox"/> <b>Insurance Reduction/Waiver</b>	
<b><u>EXHIBIT D.</u></b>	<input type="checkbox"/> <b>Federal Transit Administration Contract Provisions</b>	
<b><u>EXHIBIT E.</u></b>	<input type="checkbox"/> <b>Contractor's Debarment Certification</b>	
<b><u>EXHIBIT F.</u></b>	<input type="checkbox"/> <b>Subcontractor's Debarment Certification</b>	

**IN WITNESS WHEREOF**, the parties have executed this Contract on the date first above written.

**CONTRACTOR**

By: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Title: \_\_\_\_\_

**APPROVED BY  
MARIN COUNTY TRANSIT DISTRICT:**

By: \_\_\_\_\_

=====

**COUNTY COUNSEL REVIEW AND APPROVAL *(required if template content has been modified)***

**County Counsel:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## EXHIBIT "A"

### SCOPE OF SERVICES

This Contract will provide funding to West Marin Senior Services to provide the following program support:

#### Marketing and Outreach

West Marin Senior Services will:

- Work to inform the west Marin County senior community about the availability of volunteer drivers, travel navigators, West Marin Stagecoach, and shuttle programs provided by Marin Access.
- Host travel navigators and facilitate their interactions at community lunches.
- Advertise and recruit riders for shuttle programs.

#### Driver Matching Services

West Marin Senior Services will continue to match suitable drivers with members of the community enrolled in the volunteer driver program who unable to provide their own drivers. West Marin Senior Services will be responsible for background checks on drivers and will provide Marin Transit with monthly reports detailing the number of round-trip matches provided.

**EXHIBIT "B"**

**FEES AND PAYMENT SCHEDULE (required)**

DISTRICT shall pay CONTRACTOR as follows:

- (1) CONTRACT RATES. DISTRICT shall pay CONTRACTOR based on the rate table below and billed in quarter hours. CONTRACTOR shall submit requests for payment via invoice net 30 days following provision of services.

Contractor payments will be comprised of two components:

- 1. A monthly fee to support marketing and outreach efforts;
- 2. A fee per round trip ride for driver matching services.

Program Component	Fee	Limitations
Marketing & Outreach	\$500 per month	
Driver Matching	\$20 per round trip match	Up to 10 documented round-trip matches per week

- (2) MILEAGE. DISTRICT shall not pay CONTRACTOR for travel by private, leased or hired vehicles as required by this Contract.
- (3) TRAVEL COSTS. DISTRICT shall not pay CONTRACTOR for meals, lodging, or other travel costs not included in this Contract.
- (4) AUTHORIZATION REQUIRED. Services performed by CONTRACTOR and not authorized in this Contract shall not be paid for DISTRICT. Payment for additional services shall be made to CONTRACTOR by DISTRICT if, and only if, this Contract is amended by both parties in advance of performing additional services.
- (5) MAXIMUM CONTRACT AMOUNT. The maximum term of this Contract is one year. The maximum amount payable to Contractor under this Contract for this period shall not exceed \$16,400. Four additional option years are included and the maximum cost per year is \$16,400.



**EXHIBIT "C"**

**INSURANCE REDUCTION/WAIVER (if applicable)**

CONTRACTOR: \_\_\_\_\_

CONTRACT TITLE: \_\_\_\_\_

Contractor's professional liability insurance may be provided, in part, by self-insurance or large deductible as long as contractor provides: (1) evidence to the District that contractor has segregated amounts in a special insurance reserve fund meeting the contract's insurance requirements and restricted specifically to this project or (2) contractor's general insurance reserves are adequate to provide the necessary coverage and the Marin County Transit District may conclusively rely thereon.

This statement shall accompany all requests for a reduction/waiver of insurance requirements. Please check the box

if a waiver is requested or fill in the reduced coverage(s) where indicated below:

	<i>Check Where Applicable</i>	<i>Requested Limit Amount</i>	<i>CAO Use Only</i>
<b>General Liability Insurance</b>	<input type="checkbox"/>	\$	
<b>Automobile Liability Insurance</b>	<input type="checkbox"/>	\$	
<b>Workers' Compensation Insurance</b>	<input type="checkbox"/>		
<b>Professional Liability Deductible</b>	<input type="checkbox"/>	\$	

Please set forth the reasons for the requested reductions or waiver.


Contract Manager Signature:

---

Date:

---

---



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**board of directors**

kathrin sears  
president  
supervisor district 3

katie rice  
vice president  
supervisor district 2

stephanie moulton-peters  
2nd vice president  
city of mill valley

judy arnold  
director  
supervisor district 5

maribeth bushey  
director  
city of san rafael

damon connolly  
director  
supervisor district 1

steve kinsey  
director  
supervisor district 4

**SUBJECT: Disadvantaged Business Enterprise Participation (DBE) Goal Methodology for Marin Transit Contracting Opportunities in Federal Fiscal Years 2020-22**

Dear Board Members:

**RECOMMENDATION:** Approve methodology for developing a three-year goal for DBE participation in Marin Transit contracts supported by U.S. Department of Transportation funds.

**SUMMARY:**

Staff recommends that your Board approve the attached methodology for determining a goal for minority- and women-owned businesses participation in Marin Transit projects that receive federal funds. As a direct federal recipient, Marin Transit is required to develop a methodology to identify and approve a three-year goal and monitor progress towards achieving that goal.

The Federal Transit Administration (FTA) requires DBE programs for contracts related to federal funding for planning activities, capital projects, and operating assistance. Transit vehicle purchases have separate DBE compliance procedures and are not subject to transit agency DBE goals. Your Board adopted a Diversity Program for Contracts at your June 24, 2013 meeting. Marin Transit's Diversity Program establishes procedures to obtain information and input regarding available businesses, monitor and enforce compliance of contractors, and develop corrective action plans if the DBE goal is not met. Marin Transit's DBE officer actively participates in an outreach committee of staff from Bay Area transportation agencies who develop programs for minority and women-owned businesses to learn about proposal, bidding, and contracting procedures and increase awareness of upcoming contract opportunities.

The proportion of funds subject to DBE requirements reflects the District's approved three-year DBE goal and upcoming contracting opportunities where federal funds will be utilized. Utilizing the methodology results in a 2 percent overall goal that is based on staff's assessment of the availability of ready, willing, and able DBEs relative to all businesses ready, willing, and able to participate in federally assisted contracts. This analysis relies on U.S. Census 2016 Countywide Business Pattern data to obtain information on businesses that offer services related to the District's upcoming contract opportunities. Staff utilized the current California Unified Certification Program Directory to identify disadvantaged businesses. The attached description of the methodology for determining the goal follows current FTA guidance. Staff anticipates an overall DBE goal for Marin Transit's FTA-assisted contracts that will be achieved through race-neutral methods.

Marin Transit is a member of the Business Outreach Committee (BOC) a group of 15 transit and transportation agencies located in the San Francisco Bay Area. The BOC held a joint public participation meeting at AC Transit on April 2, 2019 to receive comments pertinent to the FFY 2020-2022 goal-setting processes. Members of the public were given opportunities to provide comments. Invitations to the public participation session were sent to 8,700 firms in the BOC mailing list including minority and women-owned businesses and consultants/contractors. Invitations to the consultation meeting were sent to 170 community organizations and small business resources centers. In the North Bay, these organizations include the Marin Small Business Development Center, North Bay Black Chamber of Commerce, Hispanic Chamber of Commerce of Marin, the Chambers of Commerce for individual Marin Cities and Towns, and the North Coast Builders Exchange. The input obtained from these sessions is provided in the attachment to this letter.

On June 27, 2019, Marin Transit posted a Public Notice of the availability of the proposed DBE goal methodology in English and Spanish, with a link to this document, for public review and comment on the District's website at [www.marintransit.org](http://www.marintransit.org). The notice also informs the public that the proposed goal and rationale are available for inspection during normal business hours for 30 days following the date of the Public Notice. Marin Transit will submit the FFY 2020-22 DBE goal methodology to the Federal Transit Administration for review and approval.

**FISCAL IMPACT:** None associated with this report.

Respectfully submitted,



Amy Van Doren  
Director of Policy and Legislative Programs

Attachment – Marin County Transit District Overall Disadvantaged Business Enterprise (DBE) Goal for Federal Fiscal Years 2020-2022



**Marin County Transit District**  
**Overall Disadvantaged Business Enterprise (DBE) Goal**  
**Federal Fiscal Years 2020-22**

**Marin Transit**  
**Revised Overall Disadvantaged Business Enterprise (DBE) Goal**  
**for Federal Fiscal Years 2020-22**

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## Introduction

Under the requirements of the Code of Federal Regulations 49 C.F.R. Part 26.45 (Participation by Disadvantaged Business Enterprises in U.S. Department of Transportation (USDOT) Programs), Marin County Transit District developed an overall Disadvantaged Business Enterprise (DBE) goal for DBE participation from Federal Fiscal Year (FFY) 2020 through FFY 2022 in contracting opportunities that may include federal funding. Marin Transit's proposed overall DBE goal for FFY 2020-22 is 2% of the federal financial assistance for FTA-assisted contracts, exclusive of contracts related to the purchase of transit vehicles.<sup>1</sup>

The regulations require federal recipients to prepare the overall goal using a two-step process. According to the *USDOT Tips for Goal Setting*, the recipient must first determine a base figure for the relative availability of certified DBEs and potentially certified Minority and Woman-owned Business Enterprises, hereafter collectively referred to as Disadvantaged Business Enterprises (DBEs), in the relevant market area. The base figure is intended to be a measurement of the current ready, willing, and able DBEs as a percentage of all businesses ready, willing, and able to perform the recipient's anticipated FTA-assisted contracts.

Next, the recipient must examine all relevant evidence to determine what adjustment, if any, is needed to the base figure in order to arrive at an overall goal. The final adjusted figure is the recipient's overall goal and represents the proportion of federal transportation funding that the recipient is expected to allocate to DBEs during the subsequent three federal fiscal years. Once the agency determines the adjusted overall goal, the process requires considering what portion of the goal will be met by race- and gender-neutral measures.

If a recipient finds that it can meet its overall goal with race- and gender-neutral measures, those measures must be utilized. In contrast, if the recipient determines it cannot achieve the entire overall goal using only race- and gender-neutral measures, it must establish a race- and gender-conscious portion of the overall goal. Development of a race- or gender-conscious goal is subject to a 2005 legal opinion that affects federal recipients in California. Subsequent to that opinion, *Western States Paving v. State of Washington (Western States)*<sup>2</sup>, recipients in the Ninth Circuit cannot consider the use of a race- or gender-conscious goal unless a finding of statistically significant disparity has been made for the ethnic and gender groups to be included in the race- or gender-conscious goal. The Ninth Circuit determined that statistical findings demonstrating a "small disparity" are of insufficient probative value to meet the strict scrutiny standard. Citing *Croson*, the

<sup>1</sup> Effective February 28, 2011, the USDOT amended the DBE regulations set forth in 49 CFR Part 26 as described in the Federal Register, Volume 76, Number 22 and Vol.79 No. 221 October 2, 2014 Part II Disadvantaged Business Enterprise Program Implementation Modifications; 49 CFR Part 26 [Docket No. OST-2-12-0147]

<sup>2</sup> *Western States Paving Co. v. United States & Washington State Department of Transportation*, 407 F. 3d 983 (9th Cir. 2005).

Court declared that an inference of discriminatory exclusion could arise where there is a statistically significant disparity between the number of qualified minority contractors willing and able to perform a particular service and the number of such contractors actually engaged by the locality or its prime contractors.

This *Overall DBE Goal Setting Report* is based on the DBE regulations contained in 49 CFR Part 26.45, as amended, the decisions of the United States Federal Court, and the *USDOT Guidance Memorandum*. The goal identifies the relative availability of DBEs based on evidence of ready, willing, and able DBEs in relationship to all comparable businesses known to be available to compete in the Marin Transit's FTA-assisted contracts.

In April 2019, Marin County Transit District participated with peer Bay Area transit and transportation agencies in outreach sessions to obtain public participation and input in developing DBE goals. The overall DBE goal reflects staff's determination of the availability of DBE opportunities and the level of DBE participation expected absent the effects of discrimination.

Marin County Transit District will submit this revised goal methodology for FFY 2020-2022 to the Federal Transit Administration (FTA) for review. The District's recommended overall DBE goal for the period is 2%, which reflects the weighted base figure. The xxx% will be achieved through race-neutral methods. The FTA reporting period for the recommended overall goal will be October 1, 2020 to September 30, 2022.

## **Marin Transit Federally Assisted Contract Opportunities from Fiscal Years 2020 through 2022**

Marin Transit has calculated the projected number, types of work, and dollar amounts of contracting opportunities that will be funded, in whole or in part, by U.S. DOT federal financial assistance for the three-year reporting period. Exclusive of contracts for vehicle purchases, FTA-assisted contracting opportunities for Fiscal Years 2020 through 2022 are expected to primarily consist of onboard vehicle equipment and a new paratransit contract to start in the last quarter of FFY 2022. Additional projects may be undertaken if additional federal revenue becomes available, and Marin Transit will adjust the overall DBE goal if necessary. The anticipated contracts and purchases are listed below in **Table 1**. Note that DBE goals for Transit Vehicle Manufacturers are established through a separate FTA process.



**Table 1****Actual and anticipated value of FFY 2020-22 FTA-assisted contracts and percent of total amount**

<b>Project</b>	<b>Federal Dollars</b>	<b>Percent of Total</b>
ADA Paratransit Operations and Maintenance (for new contract start date July 2022)	\$1,977,000	68.20%
Uniforms for Paratransit	\$12,000	.41%
Information Technology for Paratransit	\$97,500	3.36%
Paratransit Vehicle Washing	\$48,000	1.66%
Travel Navigator for Mobility Management (for new contract start date July 2022)	\$100,000	3.45%
Automated Vehicle Location Systems: Mobile Data Terminals, Automated Vehicle Annunciators, & Automated Passenger Counters ( <i>sole source</i> )	\$321,500 Under negotiation. Estimate based on a median value.	11.09%
Clipper Regional Electronic Fare Equipment ( <i>sole source</i> )	\$140,500	4.85%
On Board Cameras ( <i>sole source</i> )	\$191,200	6.60%
Radios ( <i>sole source</i> )	\$11,000	.38%
<b>Total Anticipated Federal Value of New Contracts and Purchases</b>	<b>\$2,898,700</b>	<b>100%</b>

The total amount of anticipated funds available for DBE opportunities in federally assisted contracts and purchases is \$2,898,700 during the three-year reporting period. This amount excludes transit vehicle purchases.

Marin Transit routes uses Caltrans-administered 5311 funds to supports rural transit services. For the upcoming triennial period, Marin Transit has agreed to report these 5311 expenditures directly to FTA. There is DBE participation in the current rural operations contract, though Marin Transit will not rebid this contract in FFY 2020-22.

### **Overall DBE Goal Methodology**

The overall goal is expressed as a percentage of the total amount of U.S. DOT funds Marin Transit anticipates expending in the three forthcoming fiscal years. As described below, Marin Transit used a two-step process to establish the overall DBE goal.

### Step 1: Compute Base Figure

As specified in 49 CFR 26.45(c), Marin Transit developed a base figure to determine the relative availability of DBEs to perform work on the anticipated contracts and purchases. The formula for calculating the relative availability of DBEs for each project is:

$$\text{Base figure} = \text{Ready, willing, and able DBEs} / \text{divided by} \\ \text{All firms ready, willing and able (including DBEs and} \\ \text{non-DBEs)}$$

Based on guidance from FTA and the U.S. DOT Office of Small and Disadvantaged Business Utilization, Marin Transit computed a weighted base figure that takes into account the relative size of the anticipated contracts.

The weighted base figure was developed by:

- 1) Using the **2019** California Unified Certification Program Directory to identify the number of registered DBEs willing to perform work in Marin County Transit District's market area for each of the anticipated procurements, based on the NAICS (North American Industry Classification System) code(s) most relevant to each contract or purchase. Marin County Transit District's market area is determined based on where the substantial majority of bidders are located, as documented in the District's Bidders List. For the purposes of the DBE goal, the market area is defined as the San Francisco–Oakland–Hayward, CA Metropolitan Statistical Area (MSA) combined with the Santa Rosa, CA Metro Area MSA. This combined area includes six counties: Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Sonoma Counties. The number DBEs in the market area, by NAICs code, is listed in **Table 2**.
- 2) Using **2016** County Business Patterns (CBP) data from the U.S. Census Bureau to identify the total number of businesses available in Marin County Transit District's market area for work on each contract, based on the same NAICS codes. This data was released on April 19, 2018. **Table 2** lists the number of businesses in the market area, by NAICs code.
- 3) Dividing the number of DBEs by the number of all businesses to determine the relative availability of DBES in the market area for each contract and weighted for contracts with more than one identified work category. The proportion of DBEs available by each procurement type is listed under "% DBE" in **Table 3**.

**Table 2****Data on Availability of DBEs and Businesses for Anticipated Contracts by NAICS Code**

<b>Anticipated Contracts</b>	<b>NAICS Code</b>	<b>Six County Business Census Patterns (Two MSAs combined) by NAICS Code</b>	<b>DBEs California Unified Certification Program</b>
ADA Paratransit Operations and Maintenance	485991-Special Needs Transportation	34	<b>2</b>
Uniforms for Paratransit	812331-Linen Supply	15	<b>2</b>
Information Technology for Paratransit	541512-Computer Systems Design and Related Services	1494	<b>6</b>
Paratransit Vehicle Washing	811192-Automotive Washing and Polishing	177	<b>0</b>
Travel Navigators	624120-Services for the Elderly and Disabled	621	<b>0</b>
Mobile Data Terminals, Automated Vehicle Annunciators, & Automated Passenger Counters ( <i>combined sole source</i> )	334220-Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	27	<b>3</b>
Clipper Regional Electronic Fare Equipment ( <i>sole source</i> )	334220-Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	27	<b>3</b>

On Board Cameras (sole source)	334220-Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	27	3
Radios (sole source)	334220-Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	27	3

\* Marin Transit identifies these upcoming vehicle equipment purchases as sole source procurements consistent with existing technologies and systems. These are described under the section on the Adjusted Overall DBE Goal for FFY 2020-22, on page 14 below.

**Table 3** extracts all the NAICS codes from the anticipated projects and identifies the proportion of DBEs available to work in Marin County using the CUPC database of DBEs and the data from U.S. Census County Business Patterns for the two Metropolitan Statistical Areas by code.

### **Table 3**

#### **Relative Availability by NAICS Code for FFY 2020-22**

NAICS	Description	Available Businesses in the CBP	Number of Available DBEs	DBE % of Available Businesses by NAICS
485991	Special Needs Transportation	34	2	.0588
812331	Linen Supply	15	2	.1333
541512	Computer Systems Design and Related Services	1494	6	.0040
811192	Automotive Washing and Polishing	177	0	0

624120	Services for the Elderly and Disabled	621	0	0
334220	Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing-radio, security camera	27	3	.1111
<b>Total</b>		2368	13	.55%

**Table 4** aggregates anticipated contract expenditures by NAICS code identified for contracting and possible subcontracting opportunities. The table assigns both a proportionate dollar amount for each code and a percentage of the total anticipated estimate of federal dollars.

#### **Table 4**

#### **Summary of Anticipated Dollar Amounts by NAICS Code**

<b>NAICS</b>	<b>Description</b>	<b>Anticipated Contract Dollars</b>	<b>% of Total</b>
485991	Special Needs Transportation	\$1,977,000	.6820
812331	Linen Supply	\$12,000	.0041
541512	Computer Systems Design and Related Services	\$97,500	.0336
811192	Automotive Washing and Polishing	\$48,000	.0166
624120	Services for the Elderly and Disabled	\$100,000	.0345
334220	Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	\$664,200	.2291
<b>Total</b>		<b>\$2,898,700</b>	<b>100%</b>

The Base Figure is derived by dividing the number of ready, willing, and able DBE firms identified for each work category by the number of all firms identified for each corresponding work category (relative availability), weighting the relative

availability for each work category by the corresponding work category weight from **Table 4** (weighted ratio), and adding the weighted ratio figures together.

$$\text{Base Figure} = \frac{\sum (\text{Number of Ready, Willing, and Able DBEs}) \times \text{Weight} \times 100}{\text{Number of All Ready, Willing, and Able Firms}}$$

**Table 5**

**Weighted-Base Figures for FTA-Assisted Contract Expenditures FFY 20-22**

NAICS	Industry Description	NAICS Base Figure	% Total Expenditures	Weighted Base Figure
485991	Special Needs Transportation	.0588	.6820	.0401
812331	Linen Supply	.1333	.0041	.0005
	Linen Supply	.0040	.0336	.0001
54151	Computer Systems Design and Related Services	0	.0166	0
811192	Automotive Washing and Polishing	0	.0345	0
334220	Radio & Television Broadcasting & Wireless Communications Equipment Manufacturing	.1111	.2291	.0255
<b>Total</b>			100%	<b>6.63%</b>

As shown in **Table 5** above, the **Weighted Base Figure** is equal to the sum of the **Weighted Ratios** for all NAICS Work Categories and is calculated at 6.63%.

### Step 2: Adjust Base Figure

Per 49 CFR 26.45(d), following calculation of a base figure, all available evidence must be examined to determine what adjustment, if any, is needed to the base figure to arrive at the overall DBE goal. The primary form of evidence available is the past participation of DBEs in Marin Transit contracting.

#### **Bidders' List - Section 26.45(c.3)**

Marin Transit maintains a Bidder's list as set forth in 49 CFR Part 26.11 of bidders for its federal and non-federally assisted projects. Marin Transit has reviewed this list and determined that the data derived from this list substantiates the market area for contractors, including DBE contractors, as outlined above.

#### **Sources from Organizations and Institutions - Section 26.45(g.1)**

Directly and through the Business Outreach Committee, Marin Transit communicates with various contractor associations, minority business associations, and the DBE and SBE business communities in general.

### **Applicability of Disparity Studies**

Marin Transit has met its previous overall DBE goal through race-neutral means and is not required to conduct a disparity study. In developing the FFY 2020-22 DBE goal, Marin Transit staff have reviewed three disparity studies. Findings from the Caltrans and SFMTA studies are described below. In both cases, the size and nature of their projects differ significantly from Marin Transit's projects. The Santa Clara Valley Transportation Authority (VTA) recently completed a disparity study, which they have not released to the public. Marin Transit's market area does not include Santa Clara County, though our respective market areas include Bay Area counties to the north. This section also summarizes VTA's findings.

Marin Transit will consider the findings of these and future disparity studies in the conduct of its DBE participation program, including outreach and education activities with the Bay Area Business Outreach Committee, to ensure access to bid opportunities for all eligible MBE/WBE's.

Caltrans issued a draft FTA Disparity Study for comment on May 30, 2019. The draft study found that minority- and woman-owned businesses participation in transit-related contracts that Caltrans and subrecipient local agencies awarded during the study period exceeded what one might expect based on the availability of those businesses for that work. Results did vary substantially across individual groups as follows:

- Three groups exhibited disparity indices substantially below parity: non-Hispanic white woman-owned businesses, Asian Pacific American-owned businesses, and Black American-owned businesses.
- Three DBE categories did not exhibit a disparity: Hispanic American-owned businesses, Native American-owned businesses, and Subcontinent Asian American-owned businesses.

Minority- and woman-owned businesses considered together exceeded parity on both prime contracts and subcontracts. Results for individual groups indicated that:

- Three groups exhibited disparity indices substantially below parity on prime contracts: non-Hispanic white woman-owned businesses, Asian Pacific American-owned businesses, and Black American-owned businesses
- Black American-owned businesses were the only group that exhibited a disparity index substantially below parity on subcontracts.

The draft Caltrans study also analyzed the results separately for transit-related professional services and goods and services contracts. It found overall that minority- and woman-owned businesses did not show disparities for professional services contracts or for goods and services contracts. However, disparity analyses results differed by contracting area and DBE group:

- Three groups exhibited disparity indices substantially below parity on professional services contracts: non-Hispanic white woman-owned

businesses, Asian Pacific American-owned businesses, and Black American-owned businesses.

- Two groups exhibited disparity indices substantially below parity on goods and services contracts: non-Hispanic white woman-owned businesses and Black American-owned businesses.

San Francisco Transportation Authority (SFMTA) completed a disparity study in early 2016. The SFMTA marketplace for construction and related goods contracts consists of four Bay Area counties (San Francisco, Alameda, San Mateo, and Santa Clara) and Los Angeles County. SFMTA's marketplace for professional services contracts are the same four Bay Area counties of San Francisco, Alameda, San Mateo, and Santa Clara. Marin Transit's market area includes the North Bay and does not include Santa Clara or Los Angeles Counties.

The SFMTA Disparity Study's findings include:

- SFMTA's race/gender-neutral measures appear to be effective for Minority-owned businesses (MBEs) in construction and professional services contract categories with two exceptions.
- Evidence supports a conclusion that race-neutral measures have not assisted Black American construction contractors to participate fully and equitably in SFMTA federally assisted construction contracts.
- Women-owned businesses (WBEs) are substantially underutilized on SFMTA FTA-funded contracts, whether WBEs participate as prime contractors or subcontractors in either construction or professional services contract categories, inclusive of goods.

Santa Clara Valley Transportation Authority (SCVTA) completed a disparity study in March 2019. SCVTA is in Silicon Valley, and has responsibility for transit, highways, and the BART extension project in Santa Clara County. While SCVTA has not released the study to the public, they posted the findings on their website at [www.vta.org/osdb](http://www.vta.org/osdb) under Outreach Events, as VTA Final Findings.

The VTA study found no disparities in prime contracts for small construction projects worth under \$1 million and under \$25,000. For professional services prime contractors, the study found disparities for contracts valued at under \$500,000 and under \$50,000 for African Americans, Hispanic Americans, and Caucasian Women. For prime contractors supplying goods, equipment, and supplies, the VTA study found disparities for purchases valued at under \$500,000 and under \$50,000 for African Americans, Asian Pacific Americans, and Hispanic American

For subcontractors, the VTA study identified disparities in construction subcontracts for African Americans, Asian Pacific Americans, and Subcontinent Asian Americans. For subcontracted professional services, the study found a disparity for African Americans. VTA intends to take the following actions to increase Race and Gender-Neutral DBE participation:

- Form partnerships with private firms and nonprofits to provide technical assistance and support services;



- Maintain adequate staff in the Office Business Diversity Programs;
- Use direct contracting to award small contracts to SBEs;
- Implement M/W/DBE and SBE subcontractor substitution standards;
- Assess allocation of risk at prime and subcontract level; and
- Develop a contract-opportunities forecast.

Marin Transit will continue to participate in the DBE research and outreach activities with its San Francisco Bay Area peers in the Business Outreach Committee. Marin Transit will monitor its current and future procurements to identify possible trends in DBE participation, progress in meeting its race neutral goal, and determine whether a race conscious goal is needed.

### **Historic DBE Participation in Marin Transit Contracts**

Marin Transit became a direct federal recipient in 2013. The District has had a limited number of federally assisted contracts.

The District submitted its second DBE goal and methodology to FTA in August 2016 for FFY 2017-2020, with an identified a DBE goal of 6%. The District's primary procurement in FY 2017 was to construct the \$4.7 million Downtown Novato Transit Facility to combine four bus stops into one location. This construction project is by far the District's most extensive and costly project to date. Marin Transit's DBE Officer assume the possibility of using federal funds for the project and included all the contract dollars for Novato Transit Facility in determining the 2017-19 DBE goal. As no federal dollars were used on the \$4.7 million project, the District did not meet Marin Transit's federal DBE goal.

The DBE officer set a 10 percent goal for the Novato Transit Facility construction contract. The selected bidder was also the responsive bidder and committed to meeting this 10 percent goal. Marin Transit verified the skills and demonstrated participation of a total of five DBE firms that were utilized to complete this project. In addition, a portion of the project work was carried out by an organization that supports local youth employment development - the North Bay Conservation Corps.

Marin Transit's largest federally supported procurement for FFY 2017-19 was the purchase of a Mobile Information Kiosk Vehicle to provide information for passengers riding the Muir Woods Shuttle to Muir Woods National Monument. In the FFY 17-19 goal, Marin Transit assumed that this would be a construction project.

The remaining projects for FFY 17-19 primarily consisted of highly specialized equipment purchases for new buses: fareboxes, on-board camera systems, automated passenger counters, regional electronic smart card readers, and automated vehicle annunciators. These are consistent with current equipment technologies and systems at the local and regional level. Two other projects required highly specialized skills and experience: Radio communications needs assessment and Space needs analysis for a future operations and maintenance facility.

There is DBE participation in Marin Transit's rural 5311 contract, which the District has historically reported to Caltrans. For the FFY 20-22 triennial period, Caltrans has agreed to allow Marin Transit to report its DBE participation in a Section 5311 supported contract to FTA.

In the US DOT Tips for Goal Setting in the Disadvantaged Business Enterprise Program, page 7 suggests that an agency can make a Step 2 adjustment by averaging the base figure with the past median DBE participation.

Excluding the rural 5311 program, the DBE participation rate in Marin Transit's federally assisted contracts is based on the proportion of new federally assisted contracts awarded to DBEs during FFY 2017-19 as follows:

- FFY 2017: 0%
- FFY 2018: 0%
- First half of FFY 2019: 0%

Using the method in the *Tips for Goal Setting*, the median of 0% percent is the historic participation rate in federally supported procurements. An adjusted goal would be determined in the following formula:

1. FFY 2020-22 Base Figure = 6.63%
2. Median Past Participation = 0%
3. Adjustment Factor = (6.63%) +(0%) divided by 2 = 0%

### **Consideration of an Adjusted Overall DBE Goal for FFY 2020-22**

Based on the Step 2 analysis, Marin County Transit District has concluded that the 6.63% figure should be adjusted lower. Marin Transit proposes an overall DBE goal of 2% of federal funds that will be expended in FTA-assisted contracts in FFY 2020-2022, exclusive of funds for the purchase of transit vehicles.

In FFY 2020-22, the following anticipated vehicle equipment procurements will be sole source: Mobile Data Terminals, Automated Vehicle Annunciators, & Automated Passenger Counters, Radios, and Regional Electronic Fare (Clipper). These will be consistent with existing local and regional systems. Removing those purchases from the Step One calculations lowers the Step One calculation to 4%.

The remaining anticipated contract awards are for operations: primarily for the ADA paratransit contract and possibly for a travel navigator program serving senior and disabled residents. Marin Transit's DBE officer has identified three possible areas for unbundling the ADA paratransit contract: uniforms, information technology support, and vehicle washing. Marin Transit's paratransit vehicles are fueled at the Marin County-owned garage. Thus, there are no DBE opportunities associated with fueling. Marin Transit does not anticipate any federally supported construction projects for FFY 20-22.

In anticipation of a new ADA paratransit contract in late FFY 2022, Marin Transit will work to identify possible DBE firms that may be able to provide the skills necessary to deliver the District's paratransit services. The District has some experience with its Section 5311 supported contract in efforts to identify DBEs. The contractor demonstrated a substantial good faith effort and was able to subcontract with a DBE uniform supplier. The proportional cost of uniforms for the District's 5311 supported operating contract is small, at 1% of the federal grant amount in the award.

Given the District's limited experience with DBE participation in operating contracts, Marin Transit proposes a 2% DBE goal for FFY 20-22.

### **Use of Race-Neutral Methods and DBE Contract Goals**

The U.S. DOT regulations require that race-neutral methods be used to the maximum extent feasible to achieve the DBE overall goal. Race-neutral methods include making efforts to assure that bidding and contract requirements facilitate participation by DBEs and other small businesses; unbundling large contracts to make them more accessible to small businesses; encouraging prime contractors to subcontract portions of the work that they might otherwise perform themselves; and providing technical assistance, communications programs, and other support services to facilitate consideration of DBEs and other small businesses.

Because of the emphasis on race-neutral methods, Marin County Transit District does not propose to set contract-specific DBE goals on FTA-assisted contracts to be awarded in Federal Fiscal Year 2020 through Fiscal Year 2022. Instead, the District will focus on developing race-neutral methods for facilitating DBE participation. The District will advise prospective contractors of areas for possible subcontracting, and of the availability of ready, willing, and able subcontractors, including DBE firms, to perform such work. The District will carefully monitor its progress during the year and may establish contract-specific goals if race-neutral methods do not appear sufficient to achieve the overall DBE participation goals for Federal Fiscal Year 2020 through Fiscal Year 2022. It is anticipated that the DBE goal for FTA-assisted contracts will be achieved through race-neutral methods.

### **Public Participation in Setting the Overall DBE Goal**

Under 26.45(g), Marin Transit participates in various professional services and/or construction outreach and assistance events throughout the year. Marin Transit is a member of the Business Outreach Committee (BOC) a group of 14 transit and transportation agencies located in the San Francisco Bay Area that includes BART, SFMTA, Caltrans, SamTrans/JPB, AC Transit, Alameda CTC, the Metropolitan Transportation Commission, and other smaller agencies.

The BOC held a joint community-based organization and public participation meeting at AC Transit in Oakland on April 2, 2019 to receive comments pertinent to the FFY 2020-2022 goal-setting processes. Member agencies presented their upcoming procurements along with other opportunities projected for FFY 2020 and

beyond, and members of the public were given opportunities to provide comments. The purpose of these sessions was to obtain input in the goal-setting process, specifically on the availability of ready, willing, and able DBEs relative to all businesses ready, willing, and able to compete for U.S. DOT-assisted contracts.

The BOC conducted the consultation meeting and public participation sessions to provide information about the DBE program applicable to U.S. DOT-funded contracts, and to obtain pertinent input from businesses and organizations that are most impacted by the DBE goals established for U.S. DOT-assisted contracts.

The BOC and other participating agencies disseminated copies of a notice inviting representatives of various groups, organizations, and agencies to attend the public participation session. These included minority, women's, and general professional and trade organizations, and other organizations that could be expected to have information concerning the availability of disadvantaged and non-disadvantaged businesses, the effects of discrimination on opportunities for DBEs, and the District's efforts to establish a level playing field for the participation of DBEs.

Copies of the notice were emailed and mailed in March 2019 to disadvantaged, minority, and women-owned businesses and to over 170 general contractor groups and community organizations. These organizations are knowledgeable about the availability of disadvantaged and non-disadvantaged businesses and the effects of discrimination on contracting opportunities for DBEs. In the North Bay, these organizations include the Marin Small Business Development Center, North Bay Black Chamber of Commerce, Hispanic Chamber of Commerce of Marin, the Chambers of Commerce for individual Marin Cities and Towns, and the North Coast Builders Exchange.

Only one of the invited community and business organizations, VSCE, participated in the consultation session. Over 65 firms registered for the public participation session. The discussion in the consultation session is summarized below:

- VSCE asked how the BOC could better reach contractors since their firm was the only participant in attendance for this session. He stated that it would be great to have one main website at least at the regional level of all agency contracting opportunities instead of having to register through each individual website.
- BOC members asked VSCE how they become aware of job opportunities before they are advertised. They participate in many networking opportunities and agency events. The BOC provides match-making events to build connections with prime contractors. The BOC may consider fine-tuning its annual "Meet the Primes" events to create more 1-on-1 opportunities/interviews for DBEs/SBEs and prime contractors.
- A VSCE representative stated that DBEs need assistance with financial forms in the procurement process if they have not done it before. It would be helpful for agencies to hold separate sessions to assist in completing all required forms and all involved departments should be present at those meetings.

- A BOC member asked VSCE what types of financial requirements they have for the firms they work with. The representative stated that they generally have payment mechanisms in place that are consistent with state law. Agencies asked how others were encouraging their primes to submit bills on time and what types of different payment mechanisms were there to ensure subcontractors were being paid on time and primes were being held accountable. A BOC member noted that one payment mechanism was using an escrow account to ensure subcontractors were being paid on time. This is something agencies can consider during the contract negotiations process.
- Members asked if VSCE had any suggestions for resources and how the BOC could assist. Ms. Chambers noted more outreach and partnering up with different organizations (i.e. Conference of Minority Transportation Officials (COMTO)).
- A VSCE representative asked about the difference between the BOC consultation and public participation sessions. The BOC chair explained that the consultation session is intended for business organizations, chambers of commerce, etc. to provide feedback and information on the DBE/SBE communities they work with. The public participation session is open to the general public and DBE/SBE community to comment on the goal-setting methodology agencies use to establish their overall goals and/or the DBE program in general.
- A BOC member asked the VSCE representative how busy their organizations are and noted that his agency has had several solicitations that have had few or no bids. The member asked for input on different advertising strategies and how other agencies were getting their information out.

For the public participation session, the Business Outreach Committee sent invitations to 8,700 firms on the BOC mailing list including minority and women businesses, DOT grantees, and consultants/contractors. The session provided information about the availability of certified and potential DBEs willing and able to compete for DOT-assisted contracts, an opportunity to discuss their concerns, and perspectives on how DOT recipients might more effectively administer their programs to improve DBE participation. During the public participation session, BOC member agencies discussed their respective DOT-assisted contracting opportunities projected for FFY 2019, and a forecast of contracting opportunities through FFY's 2020/2021 and 2021/2022.

Of the 65 firms that attended the April 2, 2019 public participation meeting, many emphasized the need for more outreach to the DBE community and for additional notification about upcoming procurement activities. Questions and comments included:

- Are race-neutral goals being phased out? Are you finding more success in race-conscious goals? They must be narrowly tailored based on a disparity study.
- How does an agency have a 0% proposed goal?
- Is there anywhere on your website(s) where we can see past DBE participation/goal attainment? It would be helpful to see the attainment and how DBEs could help achieve those goals. Proposed goals with past attainments will be posted on individual agency websites, and the FTA website lists its top fifty grantees past goals and attainment.
- Request that all agencies coordinate to create one major report that captures cumulative data related to the DBE program. This may include progress, challenges, participation, payments, etc. There are challenges with DBEs and SBEs being paid on time. The program should help small businesses grow and profit in the State of California.
- What level or tier are DBEs participating on contracts? How can DBEs take a larger role? FTA encourages agencies to unbundle contracts, though it can be a challenge.
- What resources are available to SBEs?
- How do businesses start forming teams before an RFP is issued? The BOC offers opportunities to help DBEs/SBEs build working relationships through matchmaking, networking, and interviews/1-on-1 with primes. DBEs are encouraged to contact project managers at the specific agency and contact primes in advance. They typically maintain a vendor database during the procurement process that lists all firms interested in a specific project.
- Our firm is interested in a solicitation and has begun the process of reaching out to DBEs. Not all DBEs will call back/respond or are not interested. What can we do? The DBE Officer can assist as some DBEs may need to update their phone numbers, have moved, etc.

Additional comments included requests to improve notification of upcoming opportunities to vendors and for workshops on insurance and strategic planning.

The BOC advised the participants that it holds quarterly events, such as networking sessions, insurance and bonding, how to get certified, etc. The BOC issues a quarterly newsletter with upcoming contracting opportunities, helpful hints on how to respond to bids, information on no-cost educational courses, and contact information for each BOC member's DBE Liaison and/or Contract Administrators.

On June 27, 2019, Marin Transit posted a Public Notice of the availability of the proposed revised DBE goal methodology in English and Spanish, with a link to this document, for public review and comment on the District's website at [www.marintransit.org](http://www.marintransit.org). The notice also informs the public that the proposed goal and rationale are available for inspection during normal business hours for 30 days following the date of the Public Notice.

## Conclusion

Marin Transit has prepared this goal setting and methodology report for submission to FTA, in compliance with the procedures outlined in 49 CFR Part 26, as amended, requiring DOT grantees to establish a DBE overall goal as a percentage of all FTA funds expected to be expended in the three forthcoming federal fiscal years. A 2% DBE overall goal has been established for all FTA-funded contracts anticipated to be awarded for FFY 2020-2022.

Marin Transit will monitor progress on the DBE overall goal by tracking each individual contract throughout the term of the contract for DBE participation and payments respective to the federal fiscal year of award.

Interested parties are encouraged to submit comments to:

Amy Van Doren, DBE Officer  
Marin County Transit District  
711 Grand Avenue, Suite 110  
San Rafael, CA 94901

Or

Federal Transit Administration, Region IX  
Attention: Civil Rights Officer  
San Francisco Federal Building  
90, 7th Street, Suite 15-300  
San Francisco, CA 94103

## Attachment 1

### Public Notice Disadvantaged Business Enterprise (DBE) Goal For Federal Fiscal Years 2020-2022

In accordance with regulations of the U.S. Department of Transportation (DOT), 49 CFR Part 26, Marin County Transit District announces its proposed goal over the following Fiscal Years 2020, 2021, and 2022 goal of 2% for DBE participation on contracts assisted by the Federal Transit Administration (FTA).

The proposed goal and its rationale are available for public review for the next 30 days during normal business hours from 8:30 a.m. to 5:00 p.m., Monday through Friday, at the offices of Marin County Transit District, 711 Grand Avenue, Suite 110 in San Rafael, CA 94901, and on our web page at [www.marintransit.org/purchasing.html](http://www.marintransit.org/purchasing.html).

Written comments will be accepted by Marin County Transit District and FTA for 30 days following publication of this notice. The District's Federal Fiscal Year 2020-2022 goal may be adjusted by any comments received.

Interested parties are encouraged to submit comments to:  
 Amy Van Doren, DBE Officer  
 Marin County Transit District  
 711 Grand Avenue, Suite 110  
 San Rafael, CA 94901

Comments may also be submitted to the Federal Transit Administration, Region IX, Attention: Civil Rights Officer, San Francisco Federal Building, 90, 7th Street, Suite 15-300, San Francisco, CA 94103.

### **Empresa Comercial en Desventaja (DBE) meta de Marin Transit para los años fiscales 2020-2022**

De acuerdo con los regulaciones del Departamento de Transportación de los EE.UU. (DOT), 49 CFR Parte 26, El Distrito de Tránsito de Marin (Marin Transit) anuncia su meta propuesta para los siguientes años fiscales 2020, 2018 y 2022 una meta del 2% participación en DBE en contratos con la ayuda de la Administración Federal de Transito (FTA).

La meta propuesta y su razón fundamental están disponibles para opinión pública para los próximos 30 días entre las horas normales 8:30 a 5:00p.m., Lunes a Viernes, en las oficinas de Marin Transit, 711 Grand Avenue, Suite 110 en San



Rafael, CA 94901, y también por nuestra página de web **[www.marintransit.org/purchasing.html](http://www.marintransit.org/purchasing.html)**.

Comentarios escritos estarán aceptados por Marin Transit y FTA para 30 días después de publicación de la noticia presente. La meta del año fiscal 2020-2022 del Distrito puede ser ajustado por los comentarios recibidos.

Se anima a los interesados a enviar sus observaciones a:

Amy Van Doren, DBE Oficial  
Marin County Transit District  
711 Grand Avenue, Suite 110  
San Rafael, CA 94901

Los comentarios también se pueden enviar a la Administración Federal de Transito, Region IX, Attention: Civil Rights Officer, San Francisco Federal Building, 90, 7th Street, Suite 15-300, San Francisco, CA 94103



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Fiscal Year 2018/19 Contract Awards and Fiscal Year 2019/20 Contracting Opportunities**

**board of directors**

Dear Board Members:

damon connolly  
president  
supervisor district 1

**RECOMMENDATION:** Information only.

dennis rodoni  
vice president  
supervisor district 4

**SUMMARY:**

The contract awards for the first half of FY 2018/19 were brought to your Board in January 2019. This report provides an update and lists all contracts awarded in FY 2018/19 and anticipated solicitations for FY 2019/20.

kate colin  
2nd vice president  
city of san rafael

*FY 2018/19 Contract Awards*

Marin Transit entered into 72 agreements. Of these, 17 are revenue or non-financial agreements. Your Board awarded 13 agreements for a total value \$10.5 million. The General Manager has the authority to approve contracts up to \$25,000 and approved a total of \$390,967 in contract awards. With authority from your Board, the General Manager also approves Task Orders and additional years of multi-year contracts as required. In total, the General Manager approved \$141,147 in Task Orders and multi-year agreements with Board authorizations. (Attachment A)

judy arnold  
director  
supervisor district 5

Capital contracts are the largest funding awards. The \$8.9 million contract with Gillig LLC for the purchase of eleven low-floor hybrid vehicles (#181959) is over 90 percent of the awarded funds. The competitively bid construction contract with Coastside Concrete awarded an additional \$479,000 for bus stop improvements.

stephanie moulton-peters  
director  
city of mill valley

The new awards of Measure AA Sales tax funding to existing yellow bus programs represent a combined total award of almost \$600,000.

katie rice  
director  
supervisor district 2

Smaller contract awards were for printing, vehicle equipment, software, and costs related to the possible acquisition of property for an operations and maintenance facility.

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

*FY 2018/19 Contracting Opportunities*

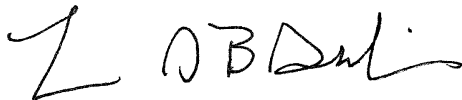
Your Board adopted the FY 2019/20 annual budget on June 4, 2019. Marin Transit staff anticipated the contract opportunities required to deliver the service and projects outlined in the Budget. These are listed in **Table 1** below.

**Table 1: FY 2019/20 Contracting Opportunities**

Product or Service	Type of Procurement	Procurement Method	Anticipated Release Date	Contract Value over or under \$1 Million
Scheduling Software	Professional Services	RFP	Award pending	Under
Realtime Signs	Equipment	RFP	Award pending	Under
9 Shuttle Vehicles	Vehicles	Joint Procurement	March 2020	Over
16 Paratransit Vehicles	Vehicles	Joint Procurement	March 2020	Over
4 Electric Vehicles	Vehicles	Piggyback	March 2020	Over
2 Muir Woods Shuttle Vehicles	Vehicles	Joint Procurement	March 2020	Under

**FISCAL/STAFFING IMPACT:** There are no fiscal impacts associated with this information item.

Respectfully submitted,



Lauren Gradia  
Director of Finance and Capital Programs

Attachment A - FY2018/19 Contract Awards

Attachment A  
FY2018/19 New Contract Awards

Contract #	Contract Title	Date of Award	Contractor	Board Awards	Other Awards (Under \$25,000)	Previous Board Authorizations
181901	Trapeze Maps Upgrade	7/25/2018	TripSpark Trapeze		\$13,175	
181902	<i>revenue contract</i>					
181903	<i>revenue contract</i>					
181904	60 Month Postage Machine Lease	7/1/2018	Pitney Bowes		\$692	
181905	<i>revenue contract</i>					
181906	<i>revenue contract</i>					
181907	Volunteer Driver Contract - Amendment 2	8/7/2018	West Marin Senior Services		\$16,400	
181908	<i>revenue contract</i>					
181909	Employee Assistance Program	9/1/2018	Employee Services Inc (ESI)		\$2,500	
181910	Rider Guide Printing	8/6/2018	Mittera Wisconsin LLC	\$45,000		
181911	Ops & Maintenance 2 <sup>nd</sup> Amendment-Connect	9/17/2018	Whistlestop		\$14,513	
181912	State of Good Repair Phase II Bus Stop Improvements	9/17/2018	Coastside Concrete	\$479,000		
181913	Marin in Motion Printing	9/20/2018	Unicorn Group		\$13,000	
181914	Public Information Services- Amendment 1	7/1/2018	Civic Edge		\$25,000	
181915	Electric Bus Operations & Maintenance	9/25/2018	GGBHTD (Golden Gate Transit)		\$25,000	
181916	<i>Non-financial agreement</i>					
181917	<i>revenue contract</i>					
181918	<i>Not issued</i>					
181919	<i>Not issued</i>					
181920	Actuarial Consulting Services	10/8/2018	David Dougherty LLC		\$10,000	
181921	Install Clipper on two XHF and one Cutaway Vehicles	10/10/2018	Cubic Transportation Systems		\$16,422	
181922	<i>revenue contract</i>					
181923	Downtown Novato Shelter Cleaning MOU	10/22/2018	Downtown Streets Team		\$3,019	
181924	Blink Tag, Inc.	11/21/2016	Blink Tag, Inc.		Time extension	
181925	Decals for two XHF Vehicles	11/1/2018	Decals by Design		\$4,559	
181926	Replacement Glass – Redwood & Grant	11/14/2018	Moon Shadow Etchers, Inc.		\$3,693	
181927	Printing Bus Transfers	11/16/2018	EDM		\$5,040	

Attachment A  
FY2018/19 New Contract Awards

Contract #	Contract Title	Date of Award	Contractor	Board Awards	Other Awards (Under \$25,000)	Previous Board Authorizations
181928	Bus Stop Design - Amendment 1	5/15/2018	Parisi Transportation		Time extension	
181929	Bus Stop Maintenance - Amendment 2	2/4/2019	Clean Solutions		Time Extension	
181930	On-Call Public Information and Marketing	12/3/2018	Civic Edge Consulting	\$50,000		
181931	revenue contract					
181932	revenue contract					
181933	Professional Services-LGS/PERS Support - Amendment 1	12/3/2018	Terry Matsumoto		\$25,000	
181934	Professional Services - Data mgmt & applications Amendment 1	1/9/2018	Trillium		\$24,950	
181935	Grant - Technology classes for seniors – Amd 1	1/9/2019	Technology 4 Life		\$25,000	
181936	Trapeze License, Maintenance, Pass Rework, Custom Data Cube	12/13/2018	TransTrack		\$20,100	
181937	Property Appraisal	1/14/2019	Nanette Quigley, Appraiser		\$3,800	
181938	GES Task Order 1.4 Property Assessment	2/4/2018	Mark Thomas			\$25,356 <sup>1</sup>
181939	On-call Short Range Transit Planning Assistance	2/15/2019	TMTF		\$19,810	
181940	Install AVL on two XHF vehicles	2/4/2019	Syncromatics	\$25,191		
181941	Shuttle MDT	2/12/2019	Syncromatics		\$9,672	
181942	revenue contract					
181943	revenue contract					
181944	Measure AA funding agreement for Ross Valley Yellow Bus service	6/3/2019	Marin County Transit District	\$132,956		
181945	Via Amendment 1 - 6-month extension	4/8/2019	Via (NoMad Transit, LLC)		\$25,000	
181946	Measure AA funding agreement for existing yellow bus program	6/3/2019	Mill Valley School District	\$25,279		
181947	Measure AA funding agreement for existing yellow bus program	6/3/2019	San Rafael City Schools	\$232,085		
181948	Measure AA funding agreement for existing yellow bus program	6/3/2019	Tiburon Peninsula JPA (Bus Challenge)	\$135,877		
181949	Measure AA funding agreement for existing yellow bus program	6/3/2019	Dixie School District	\$42,244		
181950	revenue contract	3/26/2019				
181951	License Agreement for Yellow Bus Parking Los Gatos	4/23/2019	County of Marin		\$24,700	
181952	revenue contract	6/19/2019				
181953	revenue contract	6/5/2019				

Attachment A  
FY2018/19 New Contract Awards

Contract #	Contract Title	Date of Award	Contractor	Board Awards	Other Awards (Under \$25,000)	Previous Board Authorizations
181954	On-Call Public Information and Marketing-Task Order 1	4/2/2019	Civic Edge Consulting			\$11,000 <sup>2</sup>
181955	Map Services - PASS-Core	3/27/2019	TripSpark Trapeze		\$4,650	
181956	Bike Racks for Transit Connect Vans	3/29/2019	SportsWorks		\$5,872	
181957	Property Appraisal	3/28/2019	Nanette Quigley, Appraiser		\$3,300	
181958	Hosting Start Up Costs	3/28/2019	TripSpark Trapeze		\$13,175	
181959	Purchase of 11 Low-Floor Hybrid Vehicles	4/1/2019	Gillig, LLC	\$8,906,040		
181960	WSW Travel Navigator- Amendment 2	5/6/2019	Whistlestop (WSW)	\$319,957		
181961	<i>Not used</i>					
181962	Portable toilet rental and cleaning service - Pohono & Los Gamos	6/3/2019	Mill Valley Refuse Service, Inc	\$87,500		
181963	1151 Anderson Property Appraisal	4/10/2019	Nanette Quigley, Appraiser		\$3,800	
181964	Site Acquisition and FTA Grant Compliance	4/26/2019	Leslie Rogers-LTR Advisory Services, LLC		\$25,000	
181965	FY20 Maintenance & Support Agreement-	4/30/2019	TransTrack			
181966	FY19 Financial Audit for FY18-Letter of Engagement	4/2/2018	Brown Armstrong CPA			\$32,561 <sup>3</sup>
181967	Rider Guide Printing	5/6/2019	Mittera Wisconsin LLC	\$45,000		
181968	Change Order #1	6/1/2019	Coastside Concrete		\$24,750	
181969	Task Order #8-Pohono Improvements MW	4/11/2019	Mark Thomas			\$42,230 <sup>1</sup>
181970	Task Order 1.5 GES	5/9/2019	Mark Thomas			\$30,000 <sup>1</sup>
181971	<i>Not Used</i>					
181972	Bus Maintenance Inspections	6/1/2019	Triple C Consulting		\$20,775	
181973	<i>revenue contract</i>					
181974	Braintree Payment Services Agreement	6/10/2019	Braintree		none	
181975	<i>revenue contract</i>					
181976	Ops & Maintenance-Personnel change-3rd Amendment-	pending	Whistlestop (WSW)		none	
<b>Totals:</b>				<b>\$10,526,129</b>	<b>\$390,967</b>	<b>\$141,147</b>
<ol style="list-style-type: none"> <li>1. Task order under Mark Thomas &amp; Co General Engineering Contract, Board Authorization on March 20, 2017.</li> <li>2. Task order under Civic Edge Contract 181930, Board Authorization on December 3, 2018.</li> <li>3. Second year of three-year term under Brown Armstrong Accountancy Corp Contract 171868, Board Authorization on April 4, 2018.</li> </ol>						



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Response to Marin County Civil Grand Jury Report  
“SMART First Mile/Last Mile Options”**

Dear Board Members:

**board of directors**

damon connolly  
president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
director  
supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

**RECOMMENDATION:** Authorize the Board President to forward the attached response to Marin County Civil Grand Jury Report, “SMART First Mile/Last Mile Options.”

**BACKGROUND:**

On May 9, 2019 the Marin County Civil Grand Jury released a report entitled, “SMART First Mile/Last Mile Options”. The Grand Jury requested that Marin Transit respond to the seven findings and four of the five recommendations.

Overall, the Grand Jury report suggests that Marin Transit should take the lead on implementing a First Mile/Last Mile options for SMART stations in Marin County with the Transportation Authority of Marin (TAM).

Marin Transit staff has prepared the attached response to the Grand Jury’s findings and recommendations. We have shared this draft response with TAM staff.

The Civil Grand Jury report states that the response of the governing body must be conducted in accordance with Penal Code section 933 (c) and subject to the notice, agenda, and open meeting requirements of the Brown Act.

**FISCAL/STAFFING IMPACT:**

None associated with this item.

Respectfully submitted,

Nancy Whelan  
General Manager

Attachment 1: Marin Transit Response to Civil Grand Jury Report, "SMART First Mile/Last Mile Options"

Attachment 2: SMART First/Last Mile Options Report





711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

**board of directors**

damon connolly  
president  
supervisor district 1

dennis rodoni  
vice president  
supervisor district 4

kate colin  
2nd vice president  
city of san rafael

judy arnold  
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supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

eric lucan  
alternate  
city of novato

July 1, 2019

The Honorable Judge Paul Haakenson  
Marin County Superior Court  
P.O. Box 4988  
San Rafael, CA 94913-4988

Ms. Pat Randolph, Foreperson  
Marin County Grand Jury  
3501 Civic Center Drive, Room #275  
San Rafael, CA 94903

**SUBJECT: Response to Marin County Civil Grand Jury Report,  
“SMART First Mile/Last Mile Options”**

Dear Judge Haakenson and Ms. Randolph:

On July 1, 2019, the Marin County Transit District (Marin Transit) Board of Directors authorized the Board President to respond to the Marin County Civil Grand Jury Report, “SMART First Mile/Last Mile Options.” Attached is Marin Transit’s response.

Please contact Marin Transit’s General Manager Nancy Whelan at [nwhelan@marintransit.org](mailto:nwhelan@marintransit.org) or 415-226-0864 if you have any questions about this response.

Sincerely,

Damon Connolly  
President

Attachment

Attachment

## **MARIN TRANSIT RESPONSE TO GRAND JURY REPORT FINDINGS AND RECOMMENDATIONS**

REPORT TITLE: **SMART First Mile/Last Mile Options**

REPORT DATE: **May 9, 2019**

RESPONSE BY: **Marin County Transit District (Marin Transit)**

### **GRAND JURY FINDINGS**

F1. An important key to the success of SMART will be the availability of economical, fast and convenient transit connectivity to and from the stations since many passengers do not live or work in areas close to these stops.

F2. There are numerous transportation modes to connect with SMART stations. These include walking, biking, electric bikes and scooters, cars, ride sharing, Lyft, Uber, traditional taxis, group vans, standard sized as well as smaller buses, including shuttles such as Marin Connect, which can be called as needed. In the future, autonomous shuttles and other vehicles will be an option.

F3. Transportation Authority of Marin in conjunction with Marin Transit, are the agencies charged with fostering public transit connectivity with SMART in Marin.

F4. Comprehensive surveys of customer riding patterns are extremely useful to the determination of which modes to focus on and put resources into, but the ultimate determination will be driven by customer preferences over the next few years.

F5. The distance between the SMART Larkspur terminal and the ferry terminal may act as a barrier that could adversely impact SMART ridership since currently there are no known plans for public transit between the two terminals.

F6. The SMART plan calls for limited parking for passengers at the Larkspur station. This could be an obstacle to SMART ridership northbound.

F7. There are railroad tracks owned by SMART going east out of southern Novato currently used only for freight. An engineering study is currently underway, due late spring of 2019, to determine the feasibility of extending SMART to Amtrak in the East Bay.

### **Marin Transit Response to Findings**

- We agree with Findings F1, F5, F6, F7
- We partially disagree with Findings F2, F3, and F4

F2 Explanation: The Grand Jury Report overlooked the availability of fixed route transit service provided at the Civic Center and Downtown San Rafael SMART stations. In Downtown San Rafael, bus and SMART services are coordinated at this primary transit transfer hub for Marin County. SMART agreed to time its

## Attachment

operations to sync with bus schedules at the San Rafael Transit Center (SRTC). SMART riders can access most of Marin County at the SRTC, and 14 Marin Transit bus and shuttle routes make timed transfers at half hour or 15-minute intervals at this location. At Civic Center, two Marin Transit routes serve the station and the schedules allow a four- to five-minute connection.

Connections to the existing fixed route bus network have proved to be the most cost-effective way to serve the first/last mile connection. The Grand Jury report did not include these as a potential option to consider. The ability to extend these fixed route connections to the Novato stations is dependent on capital improvements and bus stops/turnouts at or adjacent to the stations that were identified in the Metropolitan Transportation Commission led SMART Integration Study.

F3 Explanation: Golden Gate Transit (GGT) operates a shuttle (Route 31) from the San Rafael Transit Center to the Larkspur Ferry Terminal. Currently, GGT pays for the weekday ferry connector service and SMART pays for the weekend service. Under the Measure AA transportation sales tax extension, Golden Gate Transit receives funds that are specifically dedicated to provision of ferry feeder connections.

Marin Transit bus and shuttle routes serve SMART stations in Marin County where bus turnouts are provided. SMART and Golden Gate Transit have already entered into partnerships to provide first/last mile services and should be included in the conversation regarding connecting services to SMART

F4 Explanation: SMART has already conducted extensive public and passenger surveys before and after it initiated rail service. Surveys and studies assist in identifying needs and potential travel behavior. However, funding availability and sustainability is the ultimate determinant in the decision to provide service.

## **GRAND JURY RECOMMENDATIONS**

The Grand Jury requested that Marin County Transit District respond to the following recommendations.

R1. Transportation Authority of Marin and Marin Transit should conduct surveys and pertinent research, using the criteria of convenience, cost, and accessibility to determine optimal “first mile - last mile” connections to SMART stations.

R2. Marin Transit should expand the usage of Marin Connect beyond northern San Rafael no later than the first quarter of 2020.

R4. Upon completion of the SMART station in Larkspur, there needs to be a free passenger shuttle between the station and the Larkspur ferry terminal.

R5. SMART, Transportation Authority of Marin and Marin Transit should prepare a joint feasibility study for the possible implementation of an autonomous shuttle for connection from the Larkspur SMART station to the Larkspur Ferry.

Attachment

## **Marin Transit Response to Recommendations**

### Responses to Individual Recommendations

#### *R1. The recommendation has been implemented.*

Marin Transit has worked with and advised SMART on planning for its stations since its inception. In SMART's Environmental Impact Report, SMART proposed to provide up to ten shuttle routes in support of its rail service. In its planning and design phases, SMART conducted surveys and developed possible shuttle options. Marin Transit met with SMART staff and consultants throughout that process. The MTC led SMART Commuter Rail Integration Plan (2015) is the most recent effort and included all transit operators in the Highway 101 corridor.

Since SMART became operational, it has surveyed its passengers extensively. Marin Transit has conducted surveys associated with the planning and implementation of the Connect pilot service in Northern San Rafael and has shared these results with SMART and TAM.

The Transportation Authority of Marin subsidizes Lyft services and will soon provide bikeshare programs serving the SMART stations in Marin.

The Civil Grand Jury's Report does not include the most important SMART transit connections for all modes and service providers at the San Rafael Transit Center (SRTC).

#### *R2. The recommendation will not be implemented because it is not reasonable.*

The Connect service is a pilot project that Marin Transit continues to evaluate. The pilot is currently scheduled to run until the end of 2019. At this time, Marin Transit does not know whether the service will continue or what funding could be dedicated to support it. Current funding for the program comes from a Federal Section 5310 discretionary grant and the Measure B Vehicle License Fee. Marin Transit has not identified a funding source to extend current Connect operations beyond the term of the pilot. There is no funding to extend the current service beyond Northern San Rafael. At this time, Marin Transit would have to reduce its other services and reallocate resources in order to continue or expand the Connect.

#### *R4. The recommendation requires further analysis.*

Golden Gate Transit (GGT) operates a shuttle from the San Rafael Transit Center to the Larkspur Ferry Terminal. Currently, GGT pays for the weekday ferry connector service and SMART pays for the weekend service. Under the Measure AA transportation sales tax extension, Golden Gate Transit receives funds that are specifically dedicated to provision of ferry connections. Golden Gate Transit and SMART are the appropriate agencies to consider providing a shuttle connection between the Larkspur Ferry Terminal and the future Larkspur SMART station.

#### *R5. The recommendation has not yet been implemented.*

## Attachment

Golden Gate Transit owns the Larkspur Ferry Terminal and the parking overflow lots in the vicinity. GGT and the City of Larkspur should lead a future feasibility study with participation by Marin Transit, SMART, and the Transportation Authority of Marin. Currently, autonomous transit vehicles are being tested on dedicated rights of way where no other vehicles, pedestrians, or bicyclists are allowed. These dedicated rights of way are off-street and do not have traffic signals. The timeframe is unknown for studying an autonomous shuttle linking the Larkspur Ferry Terminal to the Larkspur SMART Station. This is due to the state of the technology, accompanying regulations, and the availability of funding. Marin Transit will be happy to participate in a future feasibility study with SMART, the Transportation Authority of Marin, Golden Gate Transit, and the City of Larkspur.

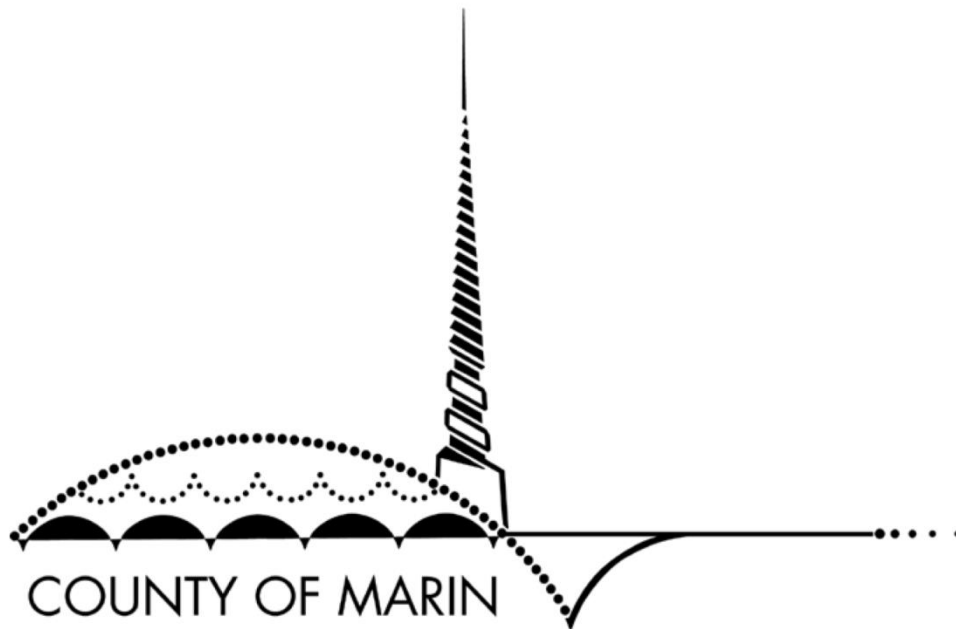
2018–2019 MARIN COUNTY CIVIL GRAND JURY

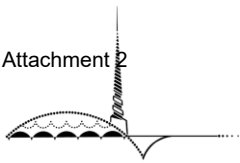
# SMART

## First Mile/Last Mile Options

Report Date: April 25, 2019

Public Release Date: May 9, 2019





## SMART – First Mile/Last Mile Options

### SUMMARY

Sonoma Marin Area Rail Transit (SMART) has been operational since August 2017, providing passenger rail service between the Sonoma County Airport Station north of Santa Rosa and downtown San Rafael. Expansion of service to Larkspur Landing as well as an additional stop in downtown Novato is scheduled to open in late 2019. One of the main objectives of SMART is to provide a transit alternative for commuters between Sonoma and Marin. Whether it will prove to be a boon to Marin and Sonoma Counties' livability, will in part depend on the convenience and feasibility of east-west and north-south connectivity to/from the stations, often referred to as "first mile - last mile."

The Marin County Civil Grand Jury issued two earlier reports on SMART operations prior to the implementation of train service. Now that SMART is operational, the current Grand Jury decided to focus on the connectivity question as it relates to SMART stations located in Marin County. While the Grand Jury looked at information related to SMART stations located in Sonoma and Marin Counties, the scope of this report is limited to Marin SMART stations.

The Grand Jury interviewed transit agency and SMART representatives as well as independent consultants; reviewed management reports; researched the SMART website; and talked with SMART passengers.

Measure Q, the voter initiative that established a sales tax to fund SMART operations, requires SMART to publish a strategic plan update every five years. With previous plans published in 2009 and 2014, the next update is due in 2019. SMART management has assured the Grand Jury that the 2019 update is under development and scheduled to be released in the fall of 2019.

All possibilities to enhance and improve first and last mile connections should be examined, including expansion of Marin Connect to include additional areas outside of the North San Rafael pilot zone. The feasibility of using autonomous shuttles should be considered since the technology is available and is currently deployed in a number of pilot projects.

Given that SMART has been operational for less than two years, they and their partner transit agencies have done a commendable job in developing numerous modes for traveling to and from SMART stations. The expectation is that new options for first and last mile connections will be implemented as the system matures.

## BACKGROUND

Marin has never had a comprehensive public transit system because its population is concentrated along its major north-south artery, U.S. 101, and its primary east-west corridor, Sir Francis Drake Boulevard. Prior to 2005, the main source of public transit was Golden Gate Transit (GGT) which ran buses within Marin and to San Francisco with ferry service from Larkspur to the SF Ferry Terminal added in August 1970. In 2005, Marin Transit took over the intra-county bus service. With the growth of Santa Rosa and Sonoma County over the past 30+ years, traffic has increased tremendously between Marin and Sonoma, but public transit between the two counties has not kept pace with this growth. Sonoma and Marin counties added a new public transit option, SMART, which started carrying passengers in August 2017. The Grand Jury decided to investigate how passengers connect to and from SMART stations within Marin County now that it has completed its first year of operation.



SMART Train at the San Rafael Station



## METHODOLOGY

The Grand Jury:

- Interviewed transportation experts from Marin agencies, representatives of major employers in the County, as well as independent consultants.
- Reviewed SMART’s website for basic operating information.
- Obtained SMART’s ridership reports and surveys.
- Rode SMART round trip between San Rafael and Santa Rosa.
- Studied prior Grand Jury reports on the development and implementation of SMART as well as documentation from other transportation sources.
- Conducted informal “interviews” with SMART riders.
- Observed passengers making connections at several stations.

## DISCUSSION

### SMART’s First Year of Operation

Currently SMART has ten stations between downtown San Rafael and a station one mile from the Sonoma County Airport. Construction is underway to expand the SMART system to Larkspur Landing as well as a new downtown stop in Novato, with passenger operation projected to begin by the end of 2019. Additionally, construction is slated to begin on the extension to Windsor shortly thereafter. Eventually, SMART plans to extend service to Healdsburg and Cloverdale in northern Sonoma County when funds become available. In addition, SMART and other regional transit agencies are preparing a study, due in 2019, of the feasibility of utilizing the existing freight line partially paralleling Highway 37 as a passenger train route. Part of this track is owned by SMART. The proposal is for SMART to ultimately connect to Amtrak in the East Bay.

Fares are multi-tiered depending on distance traveled (calibrated by zones), with special rates for youth, seniors, and the disabled. There are also discounted monthly passes and pre-purchased Clipper® cards available to all passengers. Additionally, participating employers can purchase Eco-Passes at a significant discount. They can then pass that discount on to employees, who have the added advantage of paying with pre-tax dollars. See the SMART Fact Sheet on its Eco-Pass in Appendix A for details. SMART reports that Marin businesses have been slow to embrace the use of the Eco-Passes, with only about two dozen employers doing so as of January 2019; this may be due in part to the small number of medium to large size businesses located in the county.

SMART data indicates that more than half of its revenue comes from Clipper single fare riders followed by SMART 31 day discounted monthly passes. SMART has also created a mobile app which many riders are now using. According to SMART, 16% of fare revenue for their first 12 months of operation came from passengers using the mobile app. During its field trip, the Grand

Jury used both the Clipper card and the mobile app and found the app was quite convenient. The app is available online.<sup>1</sup>

Data from SMART shows that their average monthly passenger load is approximately 63,000 riders; SMART carried its one-millionth passenger on January 17th of this year. SMART currently has capacity issues during commute hours, often resulting in standing room only, which should be ameliorated when four additional rail cars will be added in the spring of 2019.

### **Issues Investigated**

Key questions to increasing ridership are how do passengers travel to the various stations to start their trip and how do they get to their final destination after they disembark at a SMART station? SMART is attempting to address these questions. What SMART does know is that many passengers live or work at varying distances -- sometimes considerable -- east and west as well as north and south of SMART stations. A recent ridership survey is attached as Appendix B. In its investigation, the Grand Jury found that various modes of connecting to SMART stations are in use or are under consideration. These include walking, driving where parking is available, being dropped off by others, biking and scooters -- motorized and non-motorized, taking a bus or shuttle, and ridesharing in various forms.

### Connection Options

In addition to Marin Transit buses, there are several specific “first mile - last mile” options. The most important ones are illustrated below.

---

<sup>1</sup> [Apple App Store](#), [Google Play Store](#), and [SMART Website](#). Accessed on March 19, 2019.

# Modes of First/Last Mile Transit to and from SMART



### Marin Connect

Marin Connect is an on-demand, 100% accessible, nine passenger shared bus service operated as a pilot program by Marin Transit. It currently serves northern San Rafael, which includes the Marin Civic Center SMART station. The app for this service is available on-line.<sup>2</sup> The area served by this pilot program is shown in Appendix C.

A new connection issue will be raised once SMART's Larkspur terminal is completed. Though SMART is planning on 35 parking spaces plus 4 handicapped spaces at its Larkspur terminal, sufficient parking may be a problem when the station is open. Because there is approximately a quarter mile between the ferry and the SMART terminal, a public transit connection between the two could prove pivotal to increasing ridership on both systems. With the Larkspur SMART station's lack of substantial on-site parking, the Marin Connect program might become even more important for this new SMART station.



A Marin Connect shuttle stop adjacent to the Civic Center Station

<sup>2</sup> [Marin Transit/Marin Transit Connect](#). *Marin Transit*. Accessed 19 Mar. 2019.

### **Hamilton Shuttle**

For those passengers living or working in the Hamilton area, there is a free shuttle operated by Whistlestop, funded by the Hamilton Field of Marin Owners Association. It operates during commute hours, with stops at the Hamilton station from 5:50 to 8:20 A.M. and from 4:00 to 7:00 P.M. for the evening commute. See Appendix D for the shuttle's route.



Hamilton Shuttle at the Novato Hamilton SMART Station

### **Novato Dial-a-ride**

Novato residents have an alternative for transit to and from the San Marin and Hamilton stations, as well as Novato Downtown (once it is operational), called Novato Dial-A-Ride, which can provide curb-to-curb pick-up and drop-off service. This service is available to anyone within Novato (see Appendix E for the service area). To use the service, the passenger must request a ride by calling the scheduling office at 415-892-7899, preferably at least a day in advance; a same day ride request runs the risk that a seat will not be available.



## Lyft

The Transportation Authority of Marin (TAM) has partnered with Lyft in a program called “GetSmart 17”. This allows the passenger to obtain up to a \$5/ride subsidy to and from SMART stations in Marin County.<sup>3</sup> This program has proven to be extremely popular as it has gone from an initial use by only 60 in its first month of operation in September 2017 to over 1300 rides per month as of September 2018, the last date data is available. Other TAM data shows that approximately 65% of those who used this program had their origin/destination within 4 miles of a SMART station.



Banner Promoting Lyft Credit

## Zipcar

For those who want the flexibility of driving themselves to their final destination, Zipcar offers another alternative. Zipcar is a car-sharing service that allows the member to rent a car by the hour or by the day and then return the car to its point of origin. The driver applies online and receives a membership card in the mail. A car can then be reserved using the Zipcar app. Two Zipcars are currently available at the San Rafael SMART station.

## Autonomous Vehicles

Another possibility to be examined in the future is the use of autonomous vehicles. In June 2018, Mcity, a University of Michigan public-private partnership, launched the first autonomous shuttle in the United States.<sup>4</sup> Similar projects are under consideration in the Bay Area. In Marin, such possibilities could include a shuttle between the SMART

<sup>3</sup> [“TAM Partners with Lyft and Whistlestop on a \\$5-discount for Lyft to/from SMART Stations in Marin”](#). *Transportation Authority of Marin*. Accessed 19 Mar. 2019.

<sup>4</sup> [Mcity Driverless Shuttle](#). *University of Michigan*. Accessed 19 Mar. 2019.

terminus and the Larkspur Ferry terminal. Other possibilities could include a loop around Hamilton to the SMART station. In addition, perhaps a circuit through Novato that ends at the downtown Novato SMART station could be developed.

### **Biking**

Biking to and from a SMART station has proven to be a very popular option. SMART has now carried its 100,000th bicyclist as of March 14th, 2019.<sup>5</sup> While each two-car SMART train has space for 24 bicycles, a potential problem that comes with this popularity, as noted by SMART management, is that bike racks on many trains are usually filled quickly within the first few stations. In a few instances, bike riders have been turned away because there was no more room on the cars for the bikes. However, each SMART station has ten U-racks for bicycles and SMART has installed 34 electronic lockers, accommodating 68 bicycles systemwide. Each station has a minimum of four locker parking spaces and efforts are being implemented to ensure that any new stations will also have electronic lockers, as space allows. According to SMART, these lockers are rarely used, perhaps because those who bike to a SMART station also use their bikes to get to their final destination. SMART is also exploring partnerships to provide bike sharing near some of its stations.<sup>6</sup>

### Transit Subsidies

The Grand Jury investigated employer subsidies that encourage employees to take some form of public/shared services transportation. Several of Marin’s largest employers offer a variety of programs. For example, any Kaiser employee that uses public transit three times per week or any combination totaling 12 rides per month receives a monthly subsidy of \$60. Kaiser also has an arrangement with Marin Connect to provide free shuttle service for any employee riding to and from SMART stations and between Kaiser facilities. Marin Connect is also available to the general public for a fee.

Bank of Marin subsidizes any employee up to \$50/month in a commuter benefit account, which is a pre-tax benefit. It also provides Uber subsidies for employees going to and from SMART stations and bank branches.

Similarly, the County of Marin provides a program called “Ride Green” for its employees. The county offers numerous transportation benefits for employees through this program, including several for riders of SMART. Employees can ride Marin Connect shuttles to and from county facilities within the Connect service area with fees currently covered by the county. The Connect app must be downloaded for this service. They can also use the Lyft Line app for a \$5 discount. Additionally, by registering through the Employee Benefits “RideGreen” portal, employees can

---

<sup>5</sup> “[Smart To Surpass The 100,000-cyclist Mark](#).” SMART Website. *Sonoma Marin Area Rail Transit*. Accessed 14 Mar. 2019.

<sup>6</sup> “[SMART exploring bike sharing partnerships](#).” SMART Website. *Sonoma Marin Area Rail Transit*. Accessed 14 Mar. 2019.

obtain SMART Eco-Passes by purchasing a Clipper Card using pre-tax dollars and receive up to \$40/month in transit matching benefits.

## **FINDINGS**

- F1. An important key to the success of SMART will be the availability of economical, fast and convenient transit connectivity to and from the stations since many passengers do not live or work in areas close to these stops.
- F2. There are numerous transportation modes to connect with SMART stations. These include: walking, biking, electric bikes and scooters, cars, ride sharing, Lyft, Uber, traditional taxis, group vans, standard sized as well as smaller buses, including shuttles such as Marin Connect, which can be called as needed. In the future, autonomous shuttles and other vehicles will be an option.
- F3. Transportation Authority of Marin in conjunction with Marin Transit, are the agencies charged with fostering public transit connectivity with SMART in Marin.
- F4. Comprehensive surveys of customer riding patterns are extremely useful to the determination of which modes to focus on and put resources into, but the ultimate determination will be driven by customer preferences over the next few years.
- F5. The distance between the SMART Larkspur terminal and the ferry terminal may act as a barrier that could adversely impact SMART ridership since currently there are no known plans for public transit between the two terminals.
- F6. The SMART plan calls for limited parking for passengers at the Larkspur station. This could be an obstacle to SMART ridership northbound.
- F7. There are railroad tracks owned by SMART going east out of southern Novato currently used only for freight. An engineering study is currently underway, due late spring of 2019, to determine the feasibility of extending SMART to Amtrak in the East Bay.

## **COMMENDATION**

In its first year, SMART and the other transit agencies have done a commendable job in developing first and last mile connections to SMART stations. This report attempts to provide a comprehensive guide to the various connection options. To further encourage ridership on SMART, it also makes recommendations to enhance the effectiveness of the connections.



## RECOMMENDATIONS

- R1. Transportation Authority of Marin and Marin Transit should conduct surveys and pertinent research, using the criteria of convenience, cost, and accessibility to determine optimal “first mile - last mile” connections to SMART stations.
- R2. Marin Transit should expand the usage of Marin Connect beyond northern San Rafael no later than the first quarter of 2020.
- R3. SMART should complete and publish its feasibility study by July 2019 on the east-west track connecting to an Amtrak station in the East Bay.
- R4. Upon completion of the SMART station in Larkspur, there needs to be a free passenger shuttle between the station and the Larkspur ferry terminal.
- R5. SMART, Transportation Authority of Marin and Marin Transit should prepare a joint feasibility study for the possible implementation of an autonomous shuttle for connection from the Larkspur SMART station to the Larkspur Ferry.

## REQUEST FOR RESPONSES

Pursuant to Penal code section 933.05, the Grand Jury requests responses as follows:

From the following governing bodies:


- Sonoma Marin Area Rail Transit (SMART) Board of Directors (R1, R3, R5)
- Marin Transit Board of Directors (R1, R2, R4, R5)
- Transportation Authority of Marin Board of Commissioners (R1, R2, R4, R5)

The governing bodies indicated above should be aware that the comment or response of the governing body must be conducted in accordance with Penal Code section 933 (c) and subject to the notice, agenda and open meeting requirements of the Brown Act.

Note: At the time this report was prepared information was available at the websites listed.

Reports issued by the Civil Grand Jury do not identify individuals interviewed. Penal Code Section 929 requires that reports of the Grand Jury not contain the name of any person or facts leading to the identity of any person who provides information to the Civil Grand Jury. The California State Legislature has stated that it intends the provisions of Penal Code Section 929 prohibiting disclosure of witness identities to encourage full candor in testimony in Grand Jury investigations by protecting the privacy and confidentiality of those who participate in any Civil Grand Jury investigation.

## APPENDIX A: SMART Eco-Pass Fact Sheet



**SMART ECO-PASS FACT SHEET**

**THE SMART ECO-PASS**  
Employers, colleges, and veterans' groups can purchase Eco-Passes directly from SMART for their employees or members. Eco-Passes are discounted up to 50%, based on the number of passes purchased. Passes can be purchased in four, six, or twelve-month increments and are loaded onto Clipper® Cards by SMART. All Clipper® products, including the Eco-Pass, are eligible for transfer credits with other local bus operators.

DISCOUNTS FOR ECO-PASSES	
Number of Passes Purchased	Eco-Pass Price (per month)
Up to 50	\$213.00
51-250	\$193.00
251-500	\$174.00
Over 500	\$155.00
College Students & Veterans' Groups	\$138.00

It doesn't matter how far your commute is or how many times you ride the train, SMART's Eco-Pass offers one discounted flat rate.

**COMMUTER TAX BENEFITS**  
The Federal Tax Code allows employees to use up to \$265 per month of pre-tax dollars to pay for transit costs through employer sponsored programs.


**EMPLOYEE SAVINGS**  
Employees can save hundreds of dollars each year by setting aside pre-tax income to pay for transit expenses. For example, an employee who spends \$200 per month on transit will save \$60 per month, or \$720 per year, in taxes (at 30% tax rate).

**EMPLOYER SAVINGS**  
Providing employees with pre-tax commuter tax benefits can save payroll taxes for employers. The value of the benefit paid to employees is considered a tax-free transportation fringe benefit and not wage or salary compensation, therefore, payroll taxes do not apply. Employers can save roughly 7.5% in payroll taxes (including FICA, SUI, SDI and city taxes) on the amount employees set aside.

**COMMUTE COST SAVINGS**  
Taking the train can save commuters time and money. On average, most SMART Eco-Pass users would save close to \$12 each day in fuel and vehicle wear-and-tear costs.

For example, using the 2019 IRS mileage reimbursement rate of 58-cents per mile, a 70-mile round-trip commute costs \$40.60 per day. An Eco-Pass costs between \$6.90 and \$10.65 per day, depending on the number of passes purchased, saving commuters roughly \$30 per day, or \$600 per month, in fuel and vehicle wear-and-tear costs.

For more information on Eco-Passes visit [www.SonomaMarinTrain.org](http://www.SonomaMarinTrain.org), email [info@SonomaMarinTrain.org](mailto:info@SonomaMarinTrain.org) or call (707) 794-3330.

 SMART || SONOMA-MARIN AREA RAIL TRANSIT

P: (707) 794-3330    F: (707) 794-3037    [www.SonomaMarinTrain.org](http://www.SonomaMarinTrain.org)

[Eco-Pass Fact Sheet](#), Sonoma Marin Area Rail Transit

## APPENDIX B: SMART’s Recent Ridership Survey (2017-2018)

Ridership survey data is from [SMART Board of Directors Workshop](#), SMART Board of Directors

### MARIN CIVIC CENTER STATION

#### How did you get to the Marin Civic Center Station?

1. Drove my car (52%)
2. Walked (24%)
3. Dropped off at the station (Ex: Lyft, Uber, friend dropped you off, etc.) (14%)
4. Biked (7%)
5. Rode the bus (3%)

#### How are you getting to your final destination from the Marin Civic Center Station? (Select all that apply)

1. Walking (44%)
2. County of Marin Employee Shuttle (26%)
3. Getting dropped off (Ex: Lyft, Uber, friend will drop you off, etc.) (13%)
4. Driving my car (8%)
5. Biking (5%)
6. Taking a bus (4%)

### SAN RAFAEL STATION DATA

#### How did you get to the San Rafael Station?

1. Rode a bus (38%)
2. Got dropped off (Ex: Lyft, Uber, friend dropped you off, etc.) (21%)
3. Walked (15%)
4. Drove my car (13%)
5. Biked (13%)

#### How are you getting to your final destination from the San Rafael Station? (Select all that apply)

1. Walking (30%)
2. Taking a bus (23%)
3. Taking the ferry (21%)
4. Getting picked up (Ex: Lyft, Uber, friend will pick you up, etc.) (12%)
5. Biking (9%)
6. Driving my car (3%)
7. I’m already at my final destination (2%)

**APPENDIX B: SMART’s Recent Ridership Survey (2017-2018) (cont’d)****NOVATO HAMILTON STATION DATA****How did you get to the Novato Hamilton Station?**

1. Drove my car (32%)
2. Biked (23%)
3. Walked (22%)
4. Dropped off at the station (Ex: Lyft, Uber, friend dropped you off, etc.) (20%)
5. Rode the bus (3%)

**How are you getting to your final destination from the Novato Hamilton Station? (Select all that apply)**

1. Walking (46%)
2. Biking (26%)
3. Getting dropped off (Ex: Lyft, Uber, friend will drop you off, etc.) (20%)
4. Driving my car (5%)
5. Taking a bus (3%)

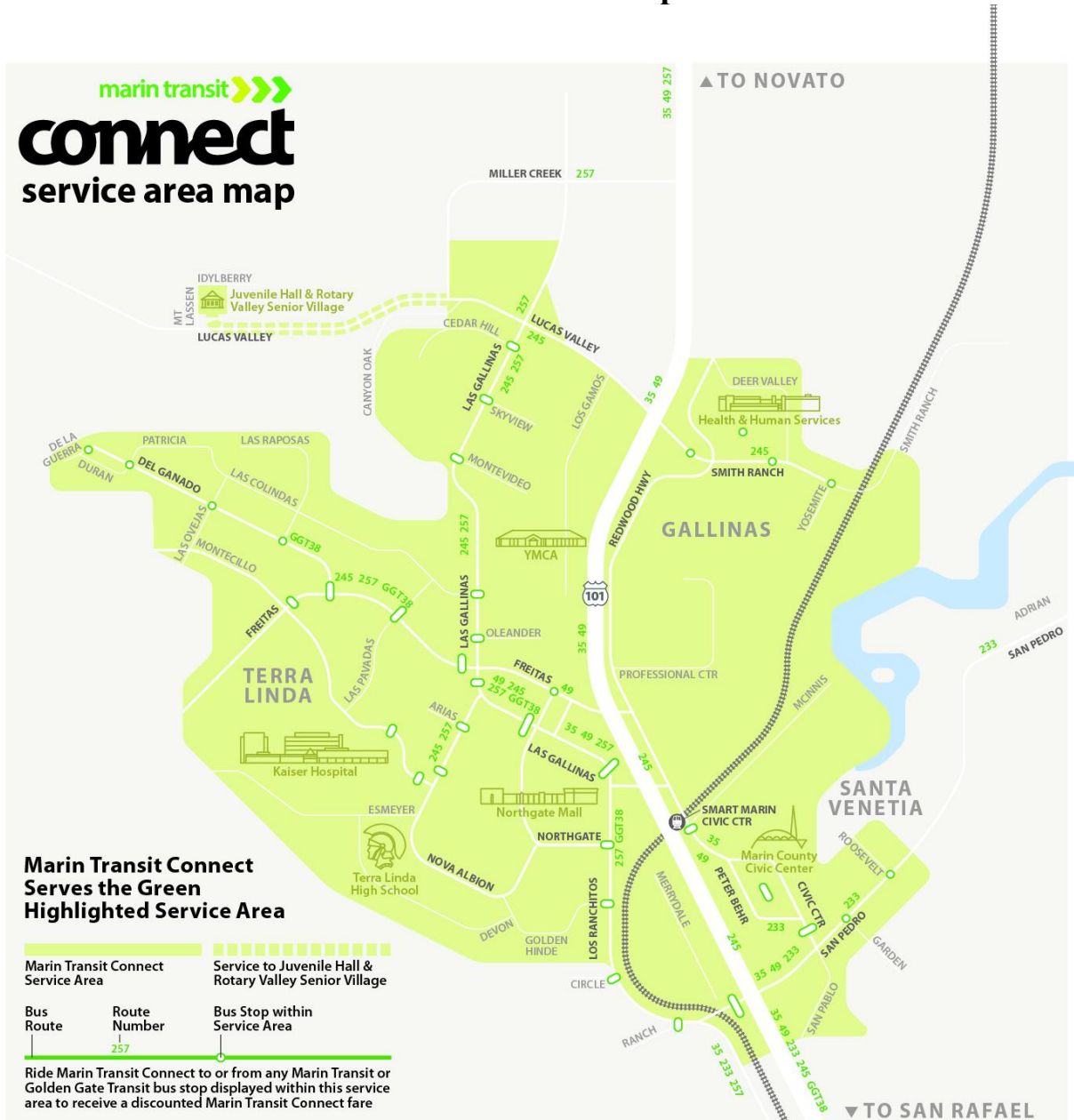
**NOVATO SAN MARIN DATA****How did you get to the Novato San Marin Station?**

1. Drove my car (46%)
2. Dropped off at the station (Ex: Lyft, Uber, friend dropped you off, etc.) (23%)
3. Biked (17%)
4. Walked (12%)
5. Rode the bus (2%)

**How are you getting to your final destination from the Novato San Marin Station? (Select all that apply)**

1. Walking (56%)
2. Getting dropped off (Ex: Lyft, Uber, friend will drop you off, etc.) (19%)
3. Driving my car (12%)
4. Biking (9%)
5. Taking a bus (4%)

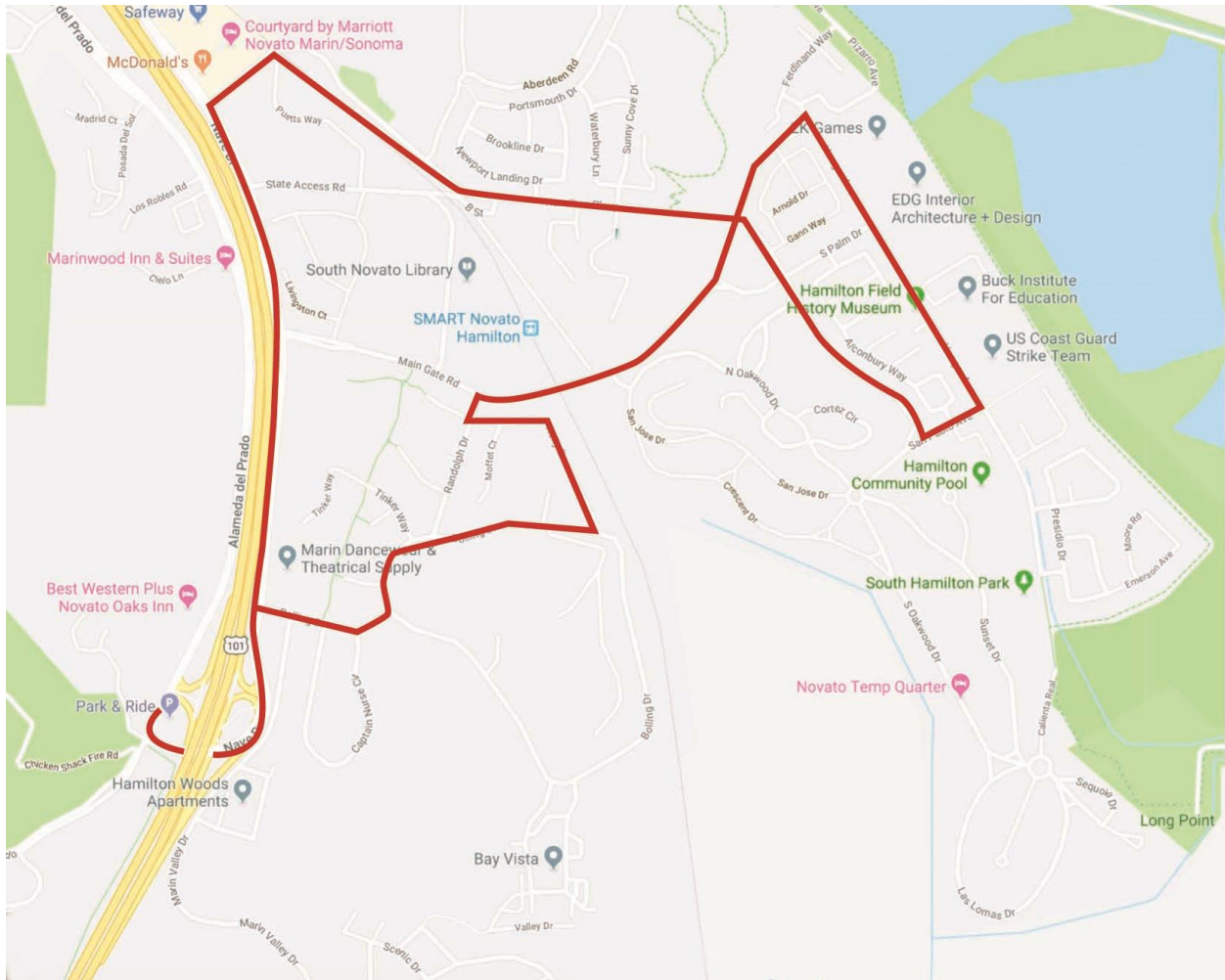
# APPENDIX C: Marin Connect Service Area Map



[Marin Connect Service Area Map, Marin Transit](#)

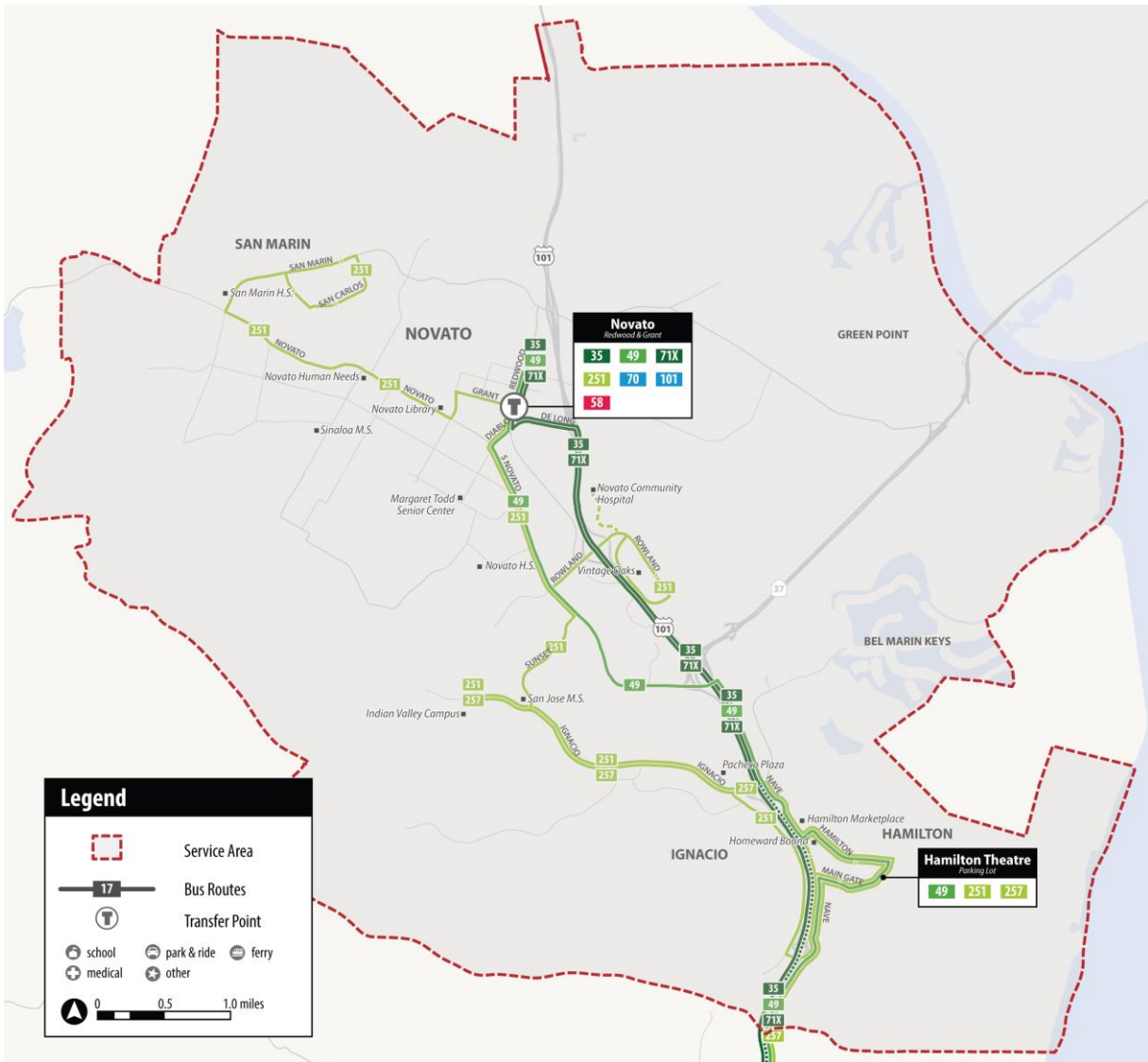


### APPENDIX D: Route Map for Hamilton Shuttle



[Route Map for Hamilton Shuttle, Hamilton Field](#)

### APPENDIX E: Service Area Map for Novato Dial-A-Ride



[Service Area Map for Novato Dial-A-Ride - Marin Transit](#)



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Marin Transit Connect One-Year Evaluation Report**

**board of directors**

Dear Board Members:

damon connolly  
president  
supervisor district 1

**RECOMMENDATION:** Accept report.

dennis rodoni  
vice president  
supervisor district 4

**SUMMARY:** Marin Transit Connect is an on-demand, public transit service offered in Northern San Rafael in operation since May 2018. Staff have prepared a one-year evaluation report based on observations, data collection, and a survey administered in November 2018.

kate colin  
2nd vice president  
city of san rafael

**BACKGROUND:** Emerging mobility services are offering new opportunities to provide more efficient and attractive transportation services to a variety of transit markets. These opportunities include advances in scheduling and dispatch technology and enhanced user-focused technology and smartphone applications. Marin Transit has worked proactively to understand the changing transportation landscape and determine how the District can best adapt to and leverage these changes to improve service for our riders. Several planning efforts have referenced the need for this type of technology. These include:

judy arnold  
director  
supervisor district 5

- 2010 Senior Mobility Action & Implementation Plan;
- 2013 Job Access Mobility Institute (JAMI) Summary Report;
- Marin Access 2016 Strategic Analysis and Recommendations; and
- Marin Transit 2016 and 2018 Short Range Transit Plan (SRTP).

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

In addition, the District’s partnership with Via in developing the Connect pilot has benefited from discussions with private businesses, non-profit organizations, and peer agencies. Beginning in 2014, ongoing stakeholder engagement has helped staff to identify partnership opportunities to leverage technology and policy changes. The District has continuously sought funding to support

eric lucan  
alternate  
city of novato



innovative mobility initiatives that will improve local transit offerings and serve the mobility needs of all Marin residents.

**STATUS:** The pilot project is the first on-demand service of its kind for Marin Transit. Developing the project required significant collaboration with Via, Whistlestop, the Transportation Authority of Marin (TAM), and stakeholder groups in the designated service area (senior facilities, employers, retail centers, etc.). The service attributes consist of:

- **Service Hours:** Weekday, 6:20am-7:00pm
- **Ride Requests:** Made using a smartphone app or calling a scheduling line
- **Fare:** \$4.00/seat or discounted \$2.00/seat for senior/ADA/transit stop. \$40.00 monthly pass option also available
- **Service Area:** Northern San Rafael
- **Vehicles:** Accessible vans (Nine passengers or five plus wheelchairs)

The Marin Transit Connect pilot is an opportunity for the District to test a new model of transit service to determine whether it can efficiently serve the unmet needs of multiple rider markets and is attractive. The goals are to gain experience with the dynamic, on-demand scheduling software and understand whether and how the Connect serves the markets identified below.

Market	Objectives
Paratransit Riders	<ul style="list-style-type: none"> <li>▪ Better understand same day paratransit opportunities and service delivery model</li> <li>▪ Improve transit options for conditionally eligible paratransit riders</li> </ul>
Commuters traveling from outside of Marin	<ul style="list-style-type: none"> <li>▪ Reduce number of drive-alone commuters</li> </ul>
Northern San Rafael residents and commuters	<ul style="list-style-type: none"> <li>▪ Improve first and last mile connectivity between Northern San Rafael residential neighborhoods and transit corridors</li> <li>▪ Test delivery method for more effective/productive neighborhood shuttle</li> </ul>

Since the launch of service on May 22, 2018, staff have closely collaborated with Via and Whistlestop to monitor and adjust service parameters. These include hours of operation, number of vehicles in service, and various operating procedures for drivers and riders. In late August, Marin Transit signed agreements with the two largest employers in Marin, the County of Marin and Kaiser, that committed them to pay the fare for their employees who use the service. These partnerships significantly increased ridership on the system. It also enabled the District to better understand the limits of the technology and work with Via to update and adjust operating parameters to meet program objectives.

Up until December 16, 2018, Marin Transit and Via staff were in ongoing discussions to identify and update the software to address ongoing performance issues. A software update on Sunday, December 16, 2018 corrected the most significant algorithm issues that hindered batching of rides and the user experience. Operations after January 1, 2018 represent a fully functional

batching and ridesharing environment and provides the conditions to better understand the potential performance of the app and the service.

Staff presented a mid-year evaluation to your Board in January 2019. Today's one-year evaluation includes another six months of performance of the service and a deeper evaluation of the markets who are using the service. The report identifies the next steps that staff will undertake to determine a recommended future direction for the pilot. Formal recommendations will include a comprehensive financial assessment and will take into account the service changes identified in the Short Range Transit Plan. Should Marin Transit decide to continue to offer the Connect, staff will perform the required steps to formalize the service.

**FISCAL/STAFFING IMPACT:** There is no fiscal impact associated with this item.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'R. Betts', written in a cursive style.

Robert Betts  
Director of Operations and Planning

Attachments: Marin Transit Connect One Year Evaluation Report  
Marin Transit Connect One Year Evaluation Presentation



# MARIN TRANSIT Connect Evaluation Report

DRAFT | July 2019

**DRAFT**

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## I. Program Background

In May of 2018, Marin Transit partnered with a technology partner (Via) to offer the first fully accessible, on-demand transportation service in the County. The pilot project was the result of years of planning and outreach to address mobility gaps for a wide range of users including seniors, those with disabilities, and able-bodied commuters. This chapter summarizes the development of this pilot project to resolve some of the longstanding mobility challenges in Marin County.

### Overview of On-Demand Transportation

Public transportation offerings typically fit into one of two categories of service: fixed route and demand response. Fixed route services serve a series of pre-defined timepoints on a fixed schedule where demand response services curb-to-curb trips based on pre-scheduled trip requests. The most common form of demand response services provided by transit agencies are complementary paratransit services. These services are provided to those who are unable to use the fixed route network, often due to a lack of accessibility to get to or from the bus stop and the riders origin or destination. Under the American with Disabilities Act (ADA), paratransit services typically require riders to schedule their ride at least one day in advance so agencies can develop driver manifests to accommodate all requests for day-of operations.

On-demand transportation provide real-time, personalized mobility services to an individual based on a specific trip request. These services typically operate curb-to-curb and requests are made in real-time using a smartphone app. The most prevalent examples in the Bay area are Uber, Lyft, and, until February of 2019, Chariot<sup>1</sup>. Uber and Lyft allow riders to pick their origin and destination while Chariot predefines stops and routes that riders must go to access the service. Uber and Lyft also rely on individuals for their workforce (drivers) and vehicles whereas Chariot directly hires and trains their drivers and provides a specific vehicle to operate the service. Fare calculation and payment is done through the app and drivers do not typically take cash or credit cards.

Prior to the widespread use of smartphones, taxis provided on-demand transportation as described above. The request was typically made by calling a number or physically “hailing” a vehicle. Taxi providers use a designated vehicle for the service, as opposed to their personal vehicles, and can either be direct employees of company or operate individually as their own private company. Fares are calculated from a meter (based on time and distance) and payment is done onboard the vehicle using either cash or credit/debit card.

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<sup>1</sup> Chariot operated a commuter shuttle service in select markets including San Francisco. Rides were requested through a smartphone app similar to other TNCs. Chariot was purchased by Ford Motor Company in 2016 and operations were terminated in February 1, 2019.

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Compared to traditional fixed route and demand response (paratransit, dial-a-ride, etc.) public transportation, on-demand transportation has several differences. These include:

- **The ability for riders to book a same day, curb-to-curb ride.** Traditional demand response services that offer curb-to-curb service typically require advance reservations the day before. Advanced reservations allow the transit providers to develop “static” schedules for their drivers and vehicles so they can ensure supply and demand is balanced and transportation will be reliably provided.

While fixed route transit services offer riders a same day service without reservation, vehicles do not typically deviate from the route to provide the curb-to-curb pickup and drop-off.

- **Estimated pickup times are dynamic and not pre-set.** Traditional demand response services will provide a pickup window upon booking that gives the rider an expected time for the ride to occur. This window is typically 30 minutes wide and straddles the requested pick-up time. For example, if the rider requests a pick-up of 10:30 am, the rider would be instructed to be ready between 10:15 am and 10:45 am. On-demand services will give you an estimated pickup time only once the ride is booked. This estimate is provided through the smartphone app and updates as the vehicle gets closer to the pickup location. The app also provides additional feedback tools for the rider including the physical location of the vehicles, the driver name, vehicle type and customer service rating for the rider.
- **Automated fare payment.** App based on-demand services allow, and in some cases require, credit cards to be used for fare payment. The card is entered and associated with the rider when signing up for the service and payment is automatically deducted. Most public transit riders rely on cash to pay for their travel. Cash is generally inconvenient for riders, slows operations, and requires additional resources to process.

Over the year, the District has made progress in improving its transit services to achieve many of the benefits the on-demand services offered by the private sector. These include:

- **Investments in Demand Response Software.** The software upgrade approved in April of 2017 enhanced many features of the Marin Access operation for riders. The upgrades include;
  - Enhanced trip request tools. Riders now have access to an online passenger portal that will allow trips to be requested and managed from a PC or smartphone.
  - Enhanced Feedback Tools. Riders will be able to sign-up for phone, text, or email alerts on their upcoming trip to give them a better sense of when within the pickup window their trip will occur. Automated reminders can also be provided the day before or morning of travel.



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- Electronic Purse. Riders on Marin Access services will soon be able to pay for their travel using a credit card associated with rider profile or if the rider has pre-paid value on their account. Riders will also be able to check the value of their account through the online passenger portal.
- **Real Time Transit Arrival Information.** Marin Transit first published real-time arrival information to its riders in 2011 for the community shuttle and Stagecoach routes. In 2016, real-time information was expanded to include all local Marin Transit fixed route services. This information is available online, within various apps, and through signage at select high ridership bus stop across the county.
- **Integrated Fare Payment Card – Clipper.** Marin Transit participates along with all other transit agencies in the Bay Area in the Clipper program. Clipper provides a fare payment card that automatically deducts fares and calculates transfer credits. Riders can put value on the card and associate the card with a credit card for autoloading.

While many enhancements have been made to improve the experience for riders, there continues to be a void in the ability for riders to reliably request a same day, curbside ride and have operations be nimble enough to reliably guarantee the ride. Perhaps more importantly, riders are unable to book the ride through a smartphone app and track the status of the ride in real-time.

### Previous Efforts/Studies That Identified the Need

Recognizing the aging population in Marin County, Marin Transit has a long history of planning and implementing innovative mobility options for seniors and those with disabilities. Under the umbrella “Marin Access”, the District provides: ADA paratransit; subsidized taxi rides; coordinated volunteer driver reimbursement programs; an integrated program eligibility, resource and referral center (“Travel Navigators”); and travel training assistance.

In 2008, Marin Transit in partnership with the County of Marin conducted a study of taxi service for social service transportation and public transit programs. Based on the recommendations of this study, Marin Transit purchased accessible vans and loaned these vehicles to the local taxi industry to use for service. These vehicles operated for approximately five years before the taxi market started to downsize and cut back on operating costs, including operating these vans. Since 2016, Marin County has been lacking accessible vehicles in general public taxi service.

Marin Transit recently increased its per ride subsidy rate on its subsidized taxi program (Catch-A-Ride) in January of 2017 to encourage service providers to operate accessible vehicles and accommodate non-transfer wheelchair trips on this service. Taxi providers were offered \$20.00 per trip incentive for wheelchair trips in an accessible vehicle and a \$6.00 incentive for ambulatory trips provided in an accessible vehicle. This change did encourage one provider to start operating accessible vehicles in the program, but the supply continues to be very limited.

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While advancements have been made in senior and ADA mobility options, there continues to be a gap in the network for unplanned transportation options for those who cannot use traditional taxi and Transportation Network Company (TNC)-type services. The following is summary of previous planning efforts that identified and reinforced the demand for this type of service.

**2010 Senior Mobility Action & Implementation Plan.** The 2010 plan was the guiding framework for supporting senior mobility in Marin County and identified the need for “flexible transit services” for seniors who live too far from transit to walk.

**2013 Job Access Mobility Institute (JAMI) Summary Report.** Marin Transit participated in a countywide project that focused on improving access to employment opportunities for low-wage workers. One of the identified concepts is to develop transportation hubs served by high-frequency transit and connected to multi-modal transportation options.

**Marin Access 2016 Strategic Analysis and Recommendations.** This analysis provided guidance for developing new programs and improving current services for older adults and ADA consumers, and including more travel options. These include:

- Same-day rides, more direct service, and better time choices;
- More convenient short travel connections to local destinations and fixed route transit services;
- Safe and reliable service in the most challenging topography and roadway infrastructure in the county; and
- Options that provide new riders with attractive alternatives to driving.

Additionally, the study recognized that Marin Access riders are adopting technology and have expressed interest in the benefits technology has to offer for transportation. Advances in technology and increased rates of internet and smartphone use present the opportunity for more seamless experiences and new options for travel. As follow-up actions, the study suggested that staff develop and pilot a new transportation program with input from riders and contractors to address transportation gaps in convenience and coverage for seniors and persons with disabilities. The study also provided an example of working with outside transportation providers (for example, ride-hailing companies or employee shuttle programs) to support first and last mile connections where current services are not meeting these needs.

**Marin Transit 2016 and 2018 Short Range Transit Plan (SRTP).** The two most recent SRTPs recognize that mobility services are amid radical changes and that transit needs to respond to these changes and take advantage of benefits for congestion relief and transportation for highly transit-dependent populations. There are opportunities for public transit to be part of the solution alongside private and non-profit partners and the District should evaluate partnerships with the private sector to increase and expand mobility. The 2018 SRTP anticipated a partnership to support on-demand mobility within the plan’s first year.

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## On-Demand Partnerships Programs Observed

Many transit and transportation peers have been experimenting with various forms of partnership and programs to support on-demand transportation services. The goals of these programs range from improving first/last mile connectivity to reducing costs associated with paratransit demands. The following is a summary of select programs with various approaches to solving specific on-demand mobility gaps.

**TAM Lyft Pilot:** The Transportation Authority of Marin (TAM), in partnership with Lyft and Whistlestop, initiated a subsidized voucher program in the fall of 2017, shortly after service on SMART commenced that summer. A \$5.00 promotional code is available in the Lyft app for Marin Lyft Line (shared-ride) trips to and from a SMART station after the rider pays an initial \$2 fare. Lyft Line rides are eligible for discount given that they are shared rides, though many rides are not necessarily shared despite being a Lyft Line ride. The rider is responsible for any remaining fare above \$7.00. Whistlestop is under contract to provide an accessible service option for riders with disabilities, and schedule rides for individuals without access to smartphones.

From March 2018 to March 2019, the program has averaged 39.7 passengers per day. The time of day split is relatively even, with 13.0 average passengers in the AM period (6:00 -10:00 am), 13.2 in the midday (10:00 am-4:00 pm) period, and 11.8 in the PM (4:00-10:00 pm) period. Average trip length/trip time is not able to be calculated by station, only by month. Average trip length is approximately 3.5 miles, and trip duration is about nine minutes and thirty seconds.

Many transit agencies across the nation have experimented with partnerships with TNCs or technology companies for the past few years. Below are some representative examples and their current status.

**LAVTA Go Dublin (2017-present):** The Livermore Amador Valley Transit Authority (LAVTA) launched Go-Dublin an on-demand real time mobility alternative in partnership with Lyft, Uber, and DeSoto Cab Company. The program was developed to replace underperforming fixed route service. Using a specific promocode in either the Lyft, Uber, or DeSoto Cab Company app, riders receive half of their shared-ride fare covered up to \$5.00 for rides that start and end in the city limits of Dublin. Customers who lack access to a smartphone and/or specifically want to pay cash can reserve rides by calling DeSoto Cab Company. The cab company operated wheelchair accessible vehicles.

A goal of the program is to determine if rideshare programs reduce congestion and parking issues in Dublin while help complementing the Wheels fixed route bus service and BART.

**AC Transit Flex (2017-current):** In 2017, the Alameda-Contra Costa Transit District (AC Transit) announced the launch of a year-long microtransit pilot program

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known as AC Transit Flex, being tested as a replacement of an existing fixed route. The pilot offers an on-demand fully accessible service that serves at the existing bus stops as the reserved pick-up and drop-off sites along the designated routes. It operates using MobilityDR platform developed by DemandTrans Solutions.

To bypass waiting time at bus stops, AC Transit Flex offers riders to schedule their pick-up and desired drop-off locations, using a desktop computer, smartphone device or traditional telephone riders within two designated zones. Flex also offers AC Transit passengers to reserve an itinerary every weekday — for up to three months — as well as the option to reserve trips for family or traveling companions with a single transaction. While Flex service is designed with a reservation requirement of at least 30 minutes prior to an intended departure, it offers exceptions to the reservation requirement at two designated BART stations.

The cost to ride Flex is the same as any other AC Transit local service. Flex bus is outfitted with both a fare box and Clipper Card readers. Flex service continues today in Newark and Castro Valley.

**Pinellas County, Florida (2016-present):** In February 2016, Florida’s Pinellas Suncoast Transit Authority (PSTA) became the first agency in the nation to subsidize first/last mile Uber rides through its Direct Connect pilot. The roots of its Direct Connect pilot can be traced back to 2014, when voters rejected a transit referendum that would have added an extra penny in sales tax to expand the county’s bus service and build a 24-mile light rail system. Instead, Direct Connect offers rides to 24 direct locations with a \$5.00 subsidy towards an Uber, taxi or accessible ride. The program is ongoing.

**Centennial, Colorado (2016-2017):** The City of Centennial launched Go Centennial, a six-month pilot program that combined a multi-modal trip-planning mobile app and a fully-subsidized ridesharing service, in 2016. Go Centennial was the first multi-modal app of its kind to feature in-app booking with Lyft. The program sought to address first-last mile issues surrounding the Dry Creek light rail station in Centennial and achieve better performance than its existing dial-a-ride services.

Go Centennial was created the Centennial Innovation Team (i-team), funded by Bloomberg Philanthropies. The City’s i-team developed the Go Centennial pilot concept and led development of the implementation plan by securing private-public partnerships with Xerox, Lyft, Via and the Denver South Transportation Management Association. While the model proved to be cost-effective, ridership was lower than expected. The pilot ended in 2017.

**VTA Flex (2016):** In 2016, the Santa Clara Valley Transportation Authority (VTA) launched Flex, a six-month on-demand, shared ride service. The agency partnered with software company, RideCell, to provide the technology support of the app-based service. The pilot focused on solving first-last mile issues within the service area near VTA light rail stations to encourage ridership on the light-rail system.

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Riders were able to assign pick-up and drop-off points anywhere within a six-square mile region in North San Jose. The pilot was not continued due to low ridership.

**KCATA Bridj (2016-2017):** In March 2016, Kansas City Area Transportation Authority (KCATA) began a pilot program to test how on-demand services could integrate into the suite of transportation options available in the Kansas City region. The partnership between Bridj, KCATA, and Ford was a public-private partnership between a major U.S. transit system, an automaker, and an urban technology company to enhance existing mass transit by providing greater mobility options. The pilot ended in early 2017 after a year of low ridership. Marketing was cited as a major challenge of the pilot.

**OCTA OC Flex (2018-present):** OC Flex is an on-demand pilot program operating accessible curb-to-curb shuttle service serving two zones in Orange County operated by the Orange County Transportation Authority (OCTA) in partnership with Via. The OC Flex is funded in part by a grant provided by the Mobile Source Air Pollution Reduction Review Committee (MSRC), which provides subsidies for clean transportation alternatives. As of June 2019, OCTA passed a balanced \$1.5 billion budget for the 2019-2020 fiscal year that includes ongoing funding for the pilot.

**MBTA Paratransit Pilot Program (2018-2019):** The Massachusetts Bay Transportation Authority (MBTA) is running a pilot program with TNC companies Uber, Lyft, and Curb to offer on-demand transit service to paratransit (RIDE) customers. Trips can be booked from a smartphone, instantly or by using a call-in option for concierge service. All RIDE customers can participate in the pilot program if: they are not currently suspended, their eligibility for The RIDE does not expire during the pilot time period, they are not up for renewal of RIDE membership during the pilot time period, and they have a valid email address, phone number, and payment method on file with The RIDE program. The pilot program's newest addition, Curb, offers RIDE customers on-demand taxi trips in Boston, Brookline, Cambridge, and Somerville. The pilot program has been extended to July 1, 2019 but is subject to change or cancellation during the current period.

## Marin Transit Options Explored

The District has been exploring options to fill the same day transportation void identified in the planning efforts. These included partnering with TNCs, enhancing the existing agency operated on-demand programs, and supporting enhanced taxi service in Marin County. Marin Transit also put out a request to the industry and identified funds to help solve this issue through its Innovative Incubator program in 2017.

**DRAFT****Transportation Network Company (TNC) Opportunities**

Many transit and government agencies across the US have explored partnerships with private sector transportation companies. Transportation Network Companies (TNCs) rely on smartphone apps to match drivers and riders in need of transportation. While these companies pre-screen drivers and vehicles, their relationship closely resembles a contractor/sub-contractor relationship with their focus on technology, as opposed to service delivery. Compared to public transportation with contracted service such as Marin Transit, these companies have far less oversight and control over the service including driver training and screening and vehicle maintenance.

Marin Transit has initiated conversations with multiple private sector transportation providers that offer these types of service and has explored potential partnership opportunities. The District has also closely followed peers in the industry who have tested these arrangements. Ultimately, the District did not formally partner with TNCs for the following reasons:

- **Accommodation for riders with special needs and mobility devices.** The TNC industry does not, and in most cases cannot, require or suggest drivers provide vehicles that can accommodate mobility devices such as wheelchairs. Further, drivers are not expected to assist riders in or out of the vehicle, and to or from the curb to the front door. Accommodating those with disabilities is not only a federal requirement but also a priority for the District. While peers have supplemented their relationships with the TNC with other transportation providers that offer wheelchair accessible services, the ability to make these two service offerings comparable in terms of rider wait times, ability to book a reservation, and paying the fare, is challenging, if not impossible.

The District is also sensitive to the needs for senior riders and those with other disabilities that limit physical ability to get into and out of a vehicle. TNC drivers are not required to be trained to work with these riders.

- **Equity issues.** As previously mentioned, access to most TNC services requires not only a smartphone to book and manage the ride, but also a credit or debit card to pay for the ride. Although some TNCs offer a backend system to allow a call center to function on behalf of the smartphone, fare payment must still be worked out independently between the rider and booking party. Recent surveys of Marin Transit riders show 79% of fixed route and only 66% of Marin Access riders have a smartphone and could take advantage of the service without the support of a call center capable of dispatching trips on behalf of the rider.<sup>2</sup>
- **The ability to complement transit services, not duplicate transit services.** TNC's offer additional mobility options, or supply to the transportation network, and can play an effective role in supporting transit. However, unless very tight restrictions are put on the partnership and both parties agree to these, TNC services can

<sup>2</sup> 2017 fixed route on-board survey & 2018 Marin Access Rider Survey



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duplicate public transit and, in some cases, add additional congestion to already congested roadways and transit centers. This is especially true if the agency does not have the ability to set parameters of the service such as routing, pick-up/drop-off points, requiring shared rides over single rider trips, and setting fare policy and pricing.

- **Data sharing.** Understanding rider usage and behavior of government subsidized services is critically important to justifying investments in taxpayer dollars and giving policymakers the necessary information to make informed decisions. Since TNCs are private entities with proprietary information on how their systems function, many are resistant to sharing data that assists the funding agency in adjusting or making changes to the program.
- **Integrated trip planning and fare payment.** The smartphone app that powers TNC services is an app specific to that company that is used nationally and globally for most TNCs. The ability to customize and integrate within their platform is highly unlikely for the transit agency. Thus, riders using TNC services to complement public transit services are using TNC apps that likely do not include other public service options, and likely use other apps to receive public transit information.
- **Lack of alternative on-demand options.** To comply with federal regulation and limit agency liability in subsidizing private transportation services, public transit agencies must allow the rider choice in who provides the trip for the rider. Typically, the rider must be given a choice of at least three options and all must provide a comparable service at a comparable price. Aside from TNCs, many peers have relied on local taxi providers and/or local social service or non-profits to be their options. In Marin County, the taxi industry has suffered significant reductions in drivers and providers in recent years and current companies limit service during peak hours due to standing commitments to home to school transportation services.

While some social service agencies and nonprofits employ drivers to support their program needs, very few can keep their vehicles in service to support on-demand trip requests countywide.

### Enhanced Paratransit

Paratransit services are designed to complement fixed route for individuals who are unable to use the fixed route bus system. Service design, policies, and fares recognized the federal ADA mandates. Riders must apply and be accepted to be eligible for the service. Rides must be booked at least a day in advance and 30 minutes pickup windows are given to the rider indicating when the ride will occur. Trips are grouped together the night before and drivers largely operate a set schedule or manifest of work based on pre-arranged bookings.

Marin Transit received federal funding for a Mobility Management Technology Backbone Project in 2013. This project provided funding to develop an overall systems approach to

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Marin County's mobility management technology needs and create comprehensive technology functions to facilitate coordination of transportation for low-income residents.

From the time of award until recently, District staff searched for a vendor capable of providing suitable software. Following conversations with a variety of vendors, Marin Transit released a Request for Proposals for a comprehensive demand response scheduling software package and associated hardware for the operation of the Marin Access Paratransit program and all Marin Access mobility management programs in November 2016. The RFP asked the industry for an application that would allow the District to continue advanced reservation scheduling and dispatch to meet the requirements of the ADA and for optional enhancements that would allow on-demand scheduling to occur within a smartphone app. The results of this procurement identified that at the time, there was no single vendor that proposed that could offer both the baseline ADA requirements and the enhanced on-demand scheduling.

In April 2017, your Board authorized a contract with TripSpark for Demand Response Scheduling Software and Hardware. As the incumbent vendor, TripSpark offered new features from the previous contract. These features provide Marin Access riders and their support teams more ways to view, schedule, or update existing reservations and increase the efficiency of the call and dispatch center. They consolidate the functionalities of three software suites utilized by Marin Access contractors into one central software package. However, the TripSpark software did not provide the tools to integrate emerging mobility services or dynamically schedule same-day transportation.

### **Supporting Enhanced Taxi Service**

Traditionally, the District has relied on and subsidized local taxis to support short local trips and provide a same-day option for riders who are dependent on paratransit. Through the Marin Access Catch-A-Ride program, eligible riders receive either a \$14 or \$18 discount on up to eight one-way trips per month. The services provided are limited by the availability of taxis. Beginning in April 2015, there was a dramatic decrease in ridership when the county's largest cab company, On the Move, went out of business. Following that closure, the one remaining taxi subcontractor instituted "blackout" periods during hours of peak demand. In addition to limited availability and capacity, the taxi industry has found it difficult to operate and maintain wheelchair accessible vehicles to adequately serve all Marin residents.

### **Open Invitation to Industry**

In 2017, Marin Transit revised the Measure B Gap Grant program and reintroduced it as a Mobility Innovation Incubator. The 2017-2018 call for proposals made available up to \$100,000 over the period of two years, open to all interested parties. These included non-profits, community-based organizations, local government agencies, and private firms. The District was looking for projects and programs that required initial seed funding and technical support and addressed gaps in transportation for seniors and people with disabilities. The intent was to identify programs in areas where the District may have



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expertise though may not be the appropriate entity to operate, implement, or market a particular solution. While all types of projects were eligible, Marin Transit specifically called out the lack of on-demand, accessible service as a top priority.

Chariot, a microtransit company operating in the San Francisco Bay Area, submitted the second highest scoring application. They proposed operating accessible on-demand transportation, and their proposal advanced to the next round for phone and in-person interviews. Through subsequent meetings, Marin Transit learned that Chariot's proposal required more than seed funding, would be less cost-efficient to operate compared to existing District contracts, and that the service delivery model that Chariot was ready to implement did not meet the needs of the intended population of older adults and persons with disabilities, including the lack of accessible vehicles.

### Guiding Principles for Deployment of On-Demand Services

In order to best leverage new technology and services, Marin Transit developed criteria and principles for evaluating partnership or pilot opportunities and developing programs for on-demand services. These criteria were informed by feedback from our peers, academic research, as well as outreach to private mobility providers and are intended to help Marin Transit and the Marin Transit Board of Directors identify ways to meet the agency's goals while most efficiently and effectively serving the public.

These criteria and principles will be developed recognizing the District and other Countywide mobility goals and focus on solutions that complement and enhance existing transit services.

1. **Transit First: Fixed Route Transit Provides the Backbone for Service.** It's important to note that on-demand transportation will not take the place of fixed route transit in the foreseeable future. On-demand services will not be able to move the volume of riders and achieve productivity results of fixed route transit. Simply put, mass transit will continue to offer the best solution to move large amounts of people and fight roadway congestion in dense, transit supportive corridors. Further, if ridesharing is not encouraged, on-demand transportation has the ability to increase traffic and congestion.

Public transportation services should also serve those unable to access or use traditional fixed route. Recognizing the challenging topography in many of Marin's communities and the rapidly aging population, the need to provide and continuously expand paratransit and dial-a-ride type services is a focus of the District. These services can both complement and better connect riders to fixed route.

2. **Focus on Riders in Need of Mobility Opportunities.** The private sector is quickly responding to market desires and availability for these services in Marin is on the rise. The District in no way should directly compete with these services and use its resources to simply subsidize their offerings. Rather, opportunities to encourage their use for those who are able and evaluate discounted transfer agreements to encourage transit use should be pursued.

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3. **Accessibility for All.** The private sector has been unable to meet the needs of wheelchair users or those who need additional assistance with their travel due to a limiting physical or mental condition. These riders tend to rely on Marin Access services and have very few other options. As previously mentioned, access to most TNC services requires not only a smartphone to book and manage the ride, but also a credit or debit card to pay for the ride. Although some TNCs offer a backend system to allow a call center to function on behalf of the smartphone, fare payment must still be worked out independently between the rider and booking party. Recent surveys of Marin Transit riders show 79% of fixed route and only 66% of Marin Access riders have a smartphone and could take advantage of the service without the support of a call center capable of dispatching trips on behalf of the rider.<sup>3</sup>
4. **Ensure Accountability.** Sufficient data sharing agreements between the private and public sectors is needed to allow policy makers the ability to make informed decisions when spending taxpayer money.
5. **Riders Must Have Choice in Service Providers.** To comply with federal regulation and limit agency liability in subsidizing private transportation services public transit agencies must allow the rider choice in who provides the trip for the rider. Typically, the rider must be given a choice of at least three options and all must provide a comparable service at a comparable price. Aside from TNCs, many peers have relied on local taxi providers and/or local social service or non-profits to be there options. In Marin County, the taxi industry has suffered significant reductions in drivers and providers in recent years and current companies limit service during peak hours due to standing commitments to home to school transportation services. While some social service agencies and nonprofits employ drivers to support their program needs, very few can keep their vehicles in service to support on-demand trip requests countywide.
6. **Use Pricing and Fare Policies to Control Demand.** It's hard to argue that a curb-to-curb on-demand service is less convenient than a service you must get to and from and operates on its own schedule. If, however, on-demand and fixed route services are priced to encourage use of on-demand services for trips that are short, facilitate transfers to transit, and in areas of low congestion and transit demand, and discourage longer trips, the District could refocus fixed route resources on "trunkline" service to improve service frequencies.

### Selected Strategy

Through ongoing meetings and discussions with our partner Golden Gate Transit, Marin Transit was introduced to Via as a potential software partner to achieve the goals outlined in previous planning work. Via offered to provide Marin Transit with an opportunity to test the provision of accessible, on-demand service without making a significant investment in new software or having to contract with a new provider to operate the service. On November 20, 2017, the Marin Transit Board authorized the General Manager

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<sup>3</sup> Ibid.

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to enter into a no-fee agreement with NoMad Transit, LLC, a wholly owned subsidiary of Via Transportation, Inc. to provide a cloud-based technology platform for scheduling and dispatch of on-demand transit service. This agreement enabled staff to work with Via to develop the most appropriate use of the technology for existing or new services within Marin County. On February 26, 2018, the Board authorized the General Manager to purchase four accessible vans to provide the service. These vehicles were smaller than the traditional paratransit cutaway vehicles but offered wheelchair lifts and configurable seating options.

This selected public-private hybrid service model relies on a smartphone app and driver app technology (provided by Via) to schedule and dispatch services provided using District owned vehicles operated through current contracts. In comparison to a subsidy-only program (voucher or coupon code), this hybrid model enabled the District to control:

- Driver training, screening, and support to riders outside the vehicle;
- Vehicle design and maintenance, including wheelchair accommodation;
- Fares and fare policy, including the ability to accept cash and recognize transfer agreements with other transit services;
- Routing and operational policies, including where the service is available, limitations on trip distance, etc.; and
- Reporting metrics and data access.

Via had implemented or was in the process of implementing similar partnerships with public transit agencies throughout the country.

### Targeted Markets

The Marin Transit Connect pilot was an exciting opportunity for the District to test a transit service that could efficiently meet unmet needs of multiple markets and be more attractive for riders. The goal of the pilot is to gain experience with dynamic on-demand scheduling software and understand how it serves or does not serve the markets identified in Table 1 below. It should be noted that the pilot is focused on serving the senior/ADA market but also viewed an opportunity to serve other markets identified in the District's SRTP.

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Table 1: Targeted Markets for Connect

Market	Objectives
Senior/ADA Riders	<ul style="list-style-type: none"> <li>Better understand same day paratransit opportunities and service delivery model</li> <li>Improve transit options for conditionally eligible paratransit riders</li> </ul>
Commuters traveling from outside of Marin	<ul style="list-style-type: none"> <li>Reduce number of drive alone commuters</li> </ul>
Northern San Rafael residents and commuters	<ul style="list-style-type: none"> <li>Improve first and last mile connectivity between Northern San Rafael residential neighborhoods and transit corridors</li> <li>Test delivery method for more effective/productive neighborhood shuttle</li> </ul>

**Operations & Funding**

The Connect service is operated by the District’s paratransit contractor, Marin Senior Coordinating Council or “Whistlestop”. This decision was made because of the nature of the type of service (demand response), the nature of a curb-to-curb operation including scheduling and dispatch practices, and the desired level of driver training (ability to assist seniors and those with disabilities). Due to the unpredictable demand, the District agreed to pay the contractor for all scheduled driver hours as opposed to traditional revenue hours or only when the trips were being provided.

Initial operations consisted of a soft launch of up to two months where fares were offered for free and service supply was slowly ramped up as demand increased. The soft launch allowed Via, Whistlestop, and the District to communicate daily to identify issues and get quick resolution to refine the performance of the rider and driver app.

Operations costs for the service are based on the Whistlestop Contract service rates and estimated fuel prices. Other costs associated with service include scheduling, marketing, technology fees, staff time, and consultant support for service evaluation. Via, the software partner, is waiving the software licensing fees for the pilot period. Estimates for the technology fees are included in the ongoing service operation costs. While scheduling will primarily be done with the Via smartphone app, Marin Transit will provide phone-based scheduling under the District’s Travel Navigator program.

The initial budget for the program assumed approximately 11,000 hours of service and a total budget of just over \$800,000 annually. Estimated actuals for service are expected to be approximately 8,460 hours and at a cost of \$646,000. The primary difference in the original budget and the estimated actuals is the weekend service that was never implemented.



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In FY 2019/20, the project was primarily funded with federal grants, fare revenue, and Marin County Vehicle Registration Fees (Measure B). In 2017, Marin Transit received \$700,000 Federal Transit Administration (FTA) Section 5310 grant for the operation of same day accessible service. A portion of these funds were allocated for operations during the first year.

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## II. Program Overview

Marin Transit Connect was developed in partnership with Via and its contractor, Whistlestop. Compared to existing fixed route or demand responsive services offered by the District, the single largest difference offered by the new Connect service was the ability to dynamically request and manage your trip within a smartphone app.

### App Functionality

The partnership with Via allowed the District to test the use of technology alongside the new service to see how riders would respond. The app functions similar to TNC apps provided by Lyft and Uber and allows the following functionality:

- Requesting a shared ride from a specific pickup and drop-off location
  - Specifying if the request is for now or a later time. Also allowing a reoccurring (daily, weekly, monthly) request for this same ride request.
  - Specifying if a wheelchair accessible vehicle is needed
  - Specifying the number of passengers on the ride request
  - Receiving information on available pickup times and costs associated with the trip, then allowing a trip to be selected for pickup
  - Visually seeing the service area and notifying the rider if the requested pickup or drop-off falls outside these limits
- Providing real-time feedback to the rider on a requested ride
  - Showing the vehicle's location and movement prior to pickup
  - Updating the rider an estimated time of arrival
  - Push alerts to the rider when the vehicle is 2 minutes away, when the vehicle has arrived, and, if the rider is delayed, warnings that the driver needs to keep moving
- Managing payment and fare media
  - Management of a credit card to charge rides
  - Purchasing and storage of a monthly pass or ride credit
  - Input of coupon codes or other codes to get ride discounts
- Managing historic ride history allowing the user to see previous rides on the service including origin, destination, driver, and fare information
- Managing rider account and communication information including phone and email. Riders can also email Connect support through the app.

The images below in Figure 1 show the general booking process in the app environment.



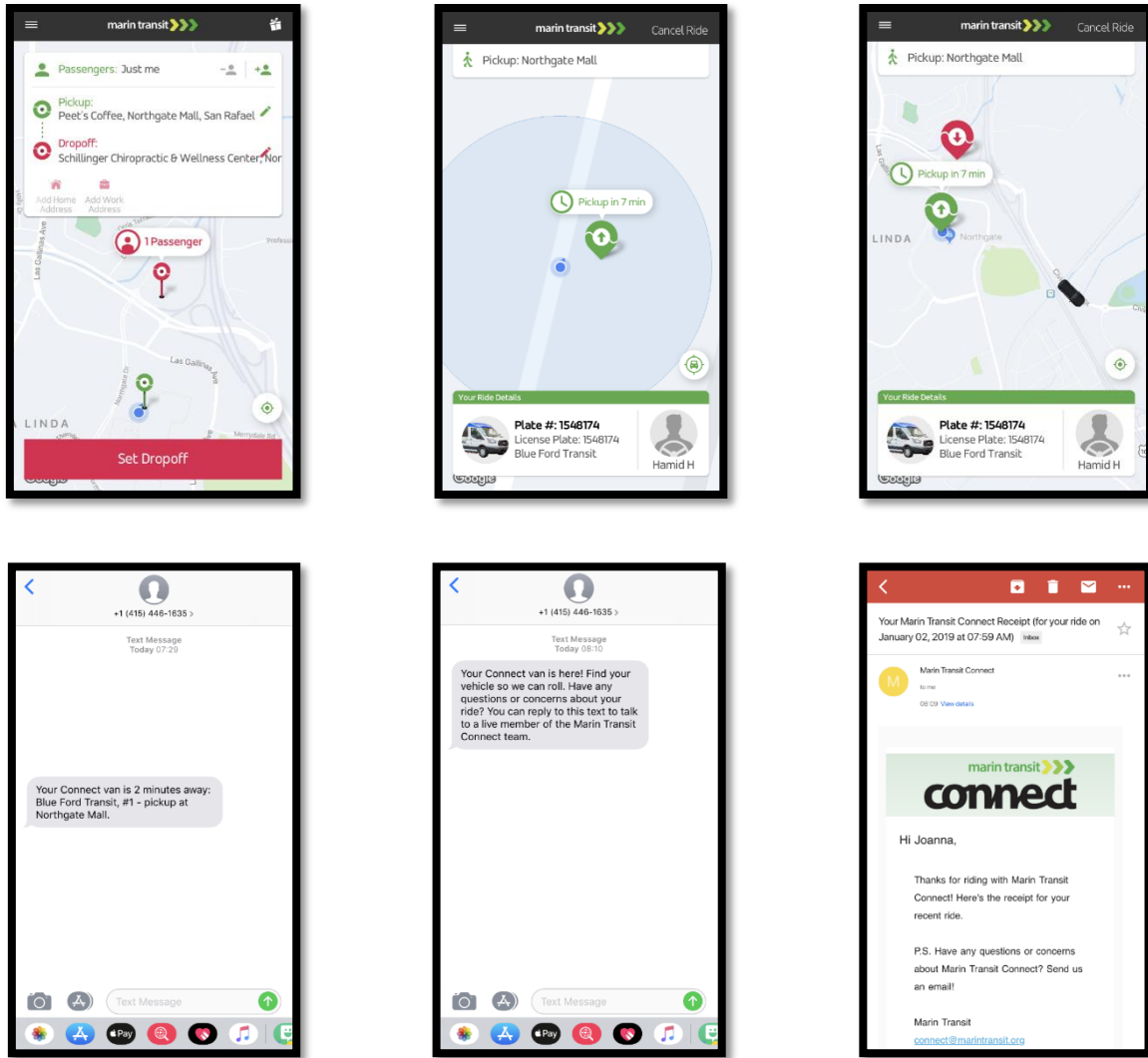


Figure 1: Trip Booking Flow in the App

### Service Characteristics

Table 2 below shows the service characteristics of the service as of May 2019.



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Table 2: Service Profile Summary

<b>Service Hours</b>	6:20-7:00pm (weekdays only)
<b>Ride Requests</b>	Requested through the app or by calling scheduling line
<b>Regular Fares</b>	\$4.00 per trip \$40.00 monthly pass
<b>Discounted Fares</b>	\$2.00 (Senior / ADA) \$2.00 (to/from bus or rail stop)
<b>Service Area</b>	Northern San Rafael
<b>Vehicles</b>	Ford Transit (9 passenger or 5 passenger + WC)

### Service Hours

The original service hours were identified as 7:00 am to 7:00 pm, weekday. These hours were identified based on typical commute hours and when Marin Access rides were taken within the service area. The start of service was adjusted to 6:20 am after four months of service due to requests by riders to meet the SMART train that is scheduled to arrive at 6:20 am. Original funding for the program included the ability to expand service to weekends but that market was not explored during the pilot program due to lack of interest observed during surveying efforts.

### Ride Requests

Request for the service can be made through the app or by calling the scheduling line. The process for making a ride request is described in the app functionality section above. Requests can be for an on-demand ride where the user wants to travel now, or by requesting a pre-scheduled ride.

Pre-scheduled rides are provided as a 20-minute window, in 10-minute increments. For example, if a rider wants to travel at 7:30am, they can request either a pickup between 7:20-7:40am or 7:30-7:50am. A pre-schedule ride request does not guarantee a ride at a specific pickup time, rather it automatically pushes a request to the system five minutes before the pickup window starts and then selects the next ride option for the rider. For example, if the rider selected the 7:20-7:40 am window, the system will submit the request to the system at 7:15 am and, assuming the next pickup option is in say nine minutes, the rider would get picked up at 7:24 am. Once the ride has been placed by the system, the user would get all ride updates and notifications within the app just like booking an on-demand trip.





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## Fares

The base fare for the service was set at \$4.00 per trip, per rider for the pilot. This fare allowed a curb-to-curb trip anywhere within the service area. A monthly pass was also offered at \$40.00 per month which provided unlimited rides for a 30-day period, starting with the date of the first ride.

Fares for additional passengers booked on the same reservation experience a discount of 50% for each passenger after the first two on the reservation. Figure 2 below shows this pricing structure.



**Figure 2: Fare Structure**

Several discounted fare options were offered during the pilot phase. The first was for a 50% discount for user who were eligible for Marin Access services (Senior/ADA programs). This discount applied to all base fares and passes. Eligible users were given a discount code that applied this discount to all fares associated with their account.

The second discount was offered to riders whose pickup or drop-off was at an existing transit stop (bus or rail). Over 50 of these locations were identified in the service area. This 50% discount was applied to the specific trip request and developed to encourage riders to use the service as an extension of the larger transit network and overcome the first/last mile challenges in the service area. Due to complexities with integrating the service into existing fare collection systems (GFI, Clipper), it was decided to offer this geographic discount instead of working out a transfer discount that would apply to fixed route and Connect services. The geographic discount was also viewed as an opportunity to aggregate trips along the major corridors, even if riders were not transferring to or from the other transit services.

## Service Area

The service area is approximately four-square miles and is shown below in Figure 3. As described in Service Strategy section in Section I, the area was selected due to: a good mix of employment, residential, educational, and other activity centers; a high level of transit services to connect to/from including fixed route local bus, fixed route regional

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bus, and regional rail; and a high concentration of Marin Access trips and activity centers for these users.

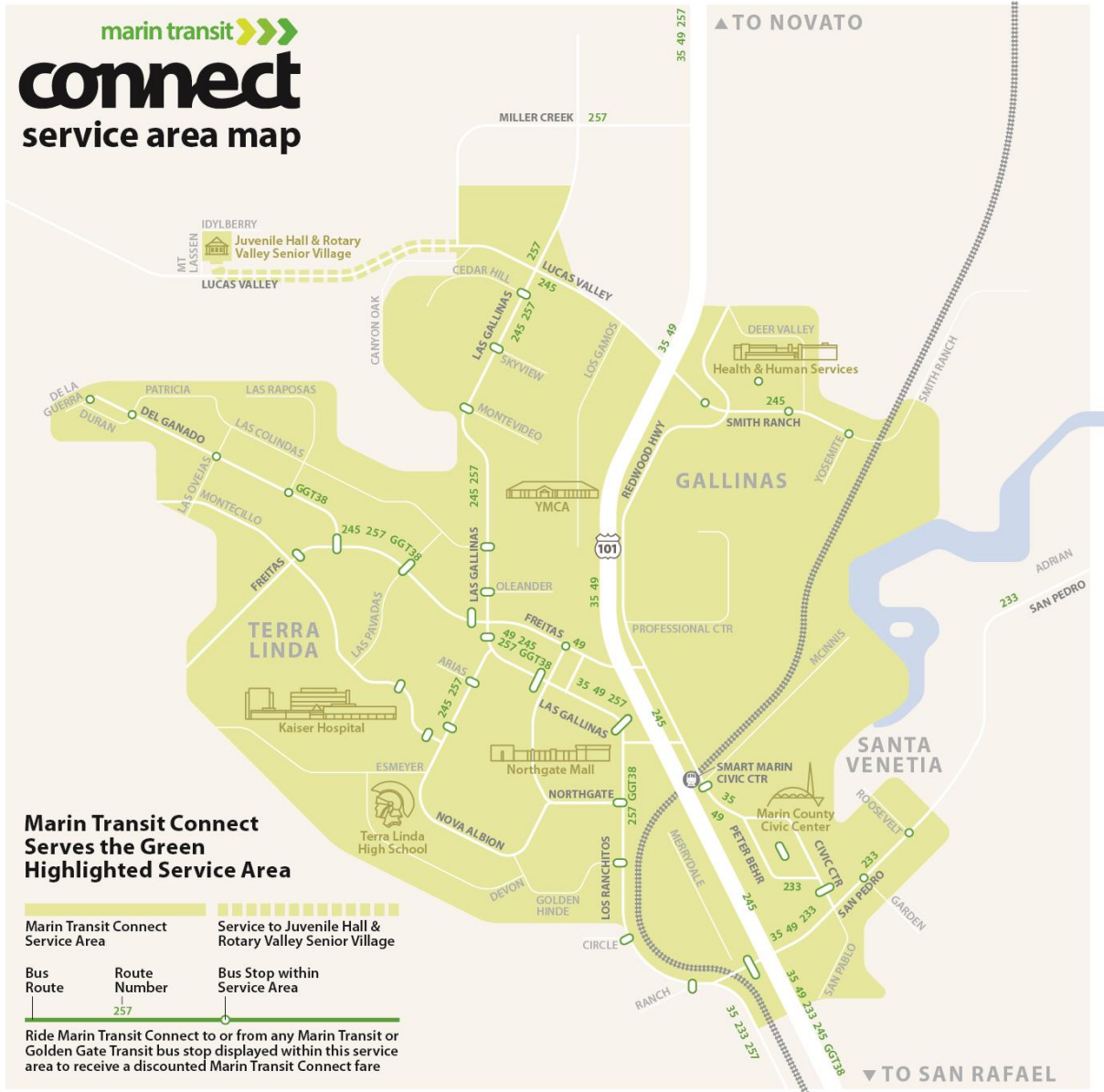


Figure 3: Service Area Map

### Vehicles

Vehicles were selected to balance the need for wheelchair accommodation and anticipated maximum passengers loads of six to eight passengers. The selected vehicle was a Ford Transit, mid-roof van. A total of four vehicles were purchased for the pilot project and each was decaled with a Connect specific branding and each was assigned a different color to allow for easier identification by riders using the service. The vehicle image is shown in Figure 4.



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**Figure 4: Connect Vehicle Image**

The vans were designed with a smart-floor system that allowed the seating configuration to be modified based on the needs of the program. The maximum seating offered without accommodation for a wheelchair is nine passengers plus the driver and the maximum with one wheelchair is five passengers plus driver. The assignment of vehicles always allows for at least one wheelchair accessible vehicle to be in service and three of the four are currently configured to accommodate wheelchairs.

### Service Levels

Operation of on-demand service is a new operating model for the District and differs from traditional fixed route and demand response services. In fixed route operations, the service levels (schedules) are set and only adjusted with demand has demonstrated a steady and consistent increase or decrease. Fixed route shows the public exactly how much service (based on frequency and span of service) will be available on any given day. Changes to a schedule on the fixed route program usually only happens at a set service change or bid change date. On-time performance is based on the vehicles ability to service the timepoint stops at the posted times.

Demand responsive service such as paratransit and dial-a-ride (DAR) are a bit more dynamic but service needs can be planned for at least the day before service. Since paratransit and DAR require advanced reservation, the scheduling department can build shifts for the next day which are only adjusted day of for unplanned operational issues such road calls or driver absenteeism. On-time performance is based on performing pickups within a window of time that was pre-determined with the rider.

On-demand services challenge operations to be able to offer enough service to ensure requested pickups are available at an attractive time but not oversupply to point where drivers sit idle and productivity is low. Supply, or the number of vehicles available for

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request, can be adjusted throughout the day or throughout the week to balance this rider experience and operational productivity.

After initial ramp up of service, the District’s approach to the pilot was to oversupply early on to (1) get a sense of unconstrained demand by time of day, (2) to give riders a positive experience of the service, and (3) offset early software issues that hindered batching of trips. Service levels were changed eight times throughout the pilot as ridership patterns changed and software bugs were reduced and eliminated. Figure 5 below shows typical daily hours of service offered, by month, during the first year of service. After a ramp up of service in August of 2018, service was slightly adjusted downward based on observed demand by time of day.

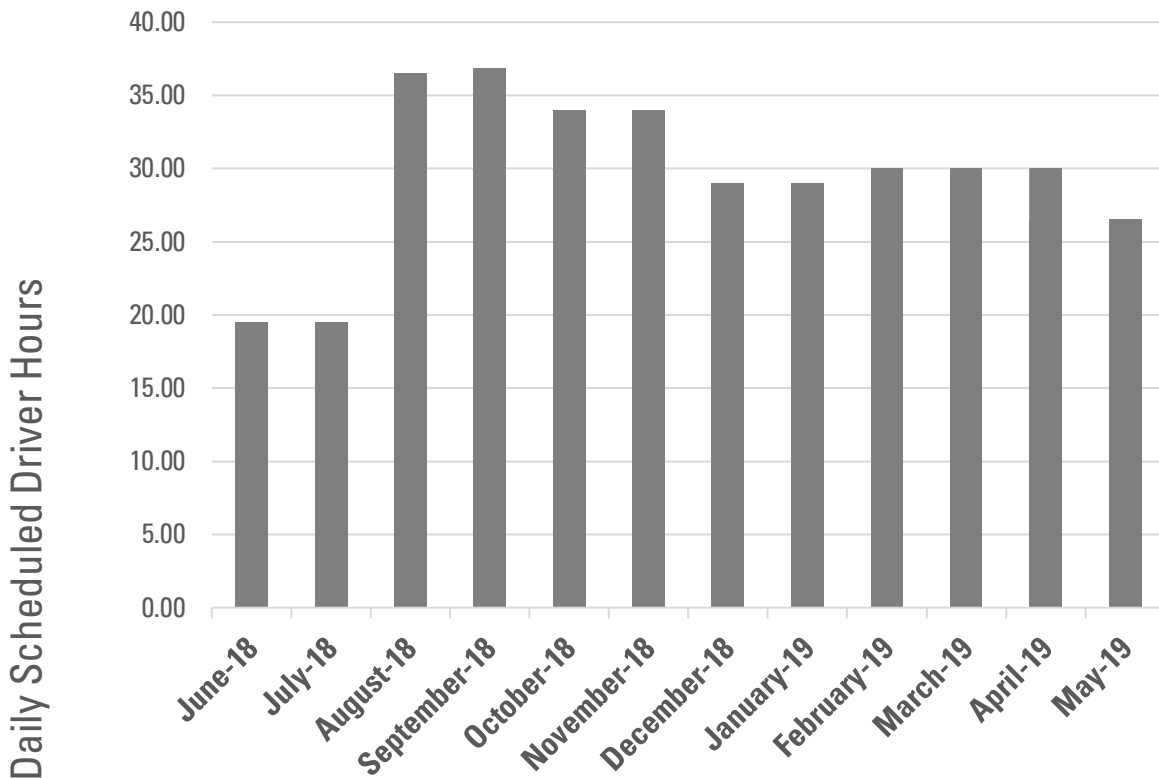


Figure 5: Scheduled Driver Hours

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## Marketing and Outreach

The Connect program was heavily marketed since the launch of the service in late May 2018. Since the program included so many new elements to riders (app, defined service area, credit card payment, on-demand/no advanced reservation, etc.), numerous strategies were used to inform potential riders of the new service. The District partnered with Via, the Travel Navigators, and other community-based partners to conduct the outreach activities. The following briefly summarizes these efforts.

**Community Events:** Marin Transit spent significant time in the first few months of the program tabling at larger community events, focusing on those within or near the service area. These events included: Northgate Mall Summer Concert Series, Agricultural Institute of Marin Sunday and Thursday Farmer's Markets at the Marin Civic Center, Kaiser Permanente Employee Wellness Festival, Drawdown Marin Global Climate Action Summit, SMART 1-Year Anniversary Celebration, Jewish Community Center (JCC) Summer Concert Series. Visitors were given Marin Transit promotional items for signing up for a Connect account.

Marin Transit also informed members of the Paratransit Coordinating Council and Marin Mobility Consortium about the service and provided marketing information for partners to distribute.

**Senior Outreach:** One of the primary reasons for creating the Connect program was to address a gap in same-day accessible service. Thus, senior outreach was the primary focus of marketing efforts for the Connect program. Calls and emails were made to over thirty senior residential facilities. Many were sent information postcards to share with residents, and presentations were given at facilities willing to accommodate.

The Marin Transit Travel Navigators were also leveraged to contact Catch-A-Ride clients within the service area to create an account with ride credit to take free rides to test out the service. Travel Navigator staff also supported Marin Transit staff during presentations at senior residential facilities.

Marin Transit staff also reached out to senior coordinators at the City of San Rafael Community Centers, San Rafael Library, YMCA and JCC to schedule tabling times, presentation opportunities, newsletter marketing, and flyer distribution.

In 2019, Marin Transit used its partnership with Technology4Life to provide Connect information as part of its Tech Tips for Transportation classes. Technology4Life also produced a Connect informational video that will be used for marketing efforts.

**Business Outreach:** Marin Transit staff conducted in-person drop off of marketing materials or sent emails to businesses within the service area including popular destinations and employers like Northgate Mall, Marin Link, Bank of Marin, Sheraton San Rafael, Embassy Suites/Hilton, San Rafael Chamber of Commerce, Kaiser Permanente, Scotty's Market, Safeway, Rite Aid, CVS, Legal Aid of Marin, Marin Ventures, DaVita Dialysis, Guide Dogs for the Blind and FICO. Many of the businesses assisted with



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marketing efforts by putting up informational posters, distributing postcards to customers, or sending out press releases or newsletters.

**On-Street Marketing:** Extensive canvassing was completed throughout the first few months of service, mainly revolving around the Civic Center SMART station—the most frequent pick-up and drop-off point within the service area. Canvassing was conducted for several hours during both the AM inbound peak and outbound PM peak. Via contributed to this effort by hiring a local brand ambassador team to provide additional support approaching riders at the SMART station, Northgate Mall, grocery stores, bus stops, and employment centers within the service area for three weeks in September of 2018. Canvassing around the SMART station continued in the April of 2019. All bus stops within the service area contain notices about the Connect service, and a large banner was installed at the SMART station.

**Digital Marketing:** The nature of Connect as an on-demand, app-based service provided the ability to directly communicate with passengers. This ability was helpful not only to communicate with riders about their trip but offer incentives to use the service. Promotional campaigns included free rides throughout May and June of 2018, \$10 in free ride credit for new riders, a two-week free ride promotion during lunch hours in October of 2018, and free rides during the 2019 Marin County Fair. Promotional codes were customized for staff to track the success of certain campaigns.

Press releases and newsletter announcements were distributed throughout the pilot period by community and business partners including Aging Action Initiative, Marin Villages, City Manager of San Rafael, JCC, Kaiser Permanente, Marin Center, and the San Rafael Chamber of Commerce.

**Employer Accounts:** Marin Transit signed agreements with the County of Marin and Kaiser Permanente to provide employee-sponsored rides for their employees. All trips taken by employees under this program had their ride charges directly billed to the respective employer. Kaiser and the County of Marin staff assisted with targeted messaging to employees to receive this transit benefit. Marin Transit was also able to send out a direct mailer to over 300 residents who subscribe to Marin County updates.



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### III. Rider Survey Results

To better understand the active users of the Connect service and those who had downloaded the app but not taken a ride, staff conducted a survey in November of 2018, approximately six months after the start of service. The survey was administered online and sent to users at the email addresses associated with the Connect app account and by pushing notifications directly within the app. In total, 193 responses were received with 105 coming from active Connect users and 88 responses received from those who had downloaded the app but never taken a ride. Based on the number of active riders and downloads, this represents approximately 48% of total active users and 25% of total accounts.

The following is a distilled overview of the survey results.

#### Who's Using Connect?

The first area addressed in the survey was who was using the Connect service. Overall, results showed that the majority were commuters using the service to get to and from the SMART station. 67% reported that their primary trip purpose was work and nearly half reported that they lived in Sonoma County. The second most common response on trip purpose was social/recreational (23%) and only 26% lived within the service area.

Rider income levels were significantly higher than typical Marin Transit fixed route or Marin Access riders. Nearly half indicated their household income was over \$100,000 compared to just 18% on fixed route and 3% on Marin Access<sup>4</sup>. Access to an automobile was also significantly higher for Connect riders with only 16% not having access and over half having access to two or more vehicles. Fixed route riders have over twice as high a percentage without access to a vehicle (38%) and only 30% with access to two or more vehicles.

Interestingly, the most frequent comment of both users on improving the service—and non-users on what it would

### SURVEY TAKEAWAYS

- Over 220 accounts have taken a ride in the last year
- 67% are traveling for work
- About half of riders are Sonoma County residents commuting on SMART
- Connect riders tend to be higher income commuters familiar with public transit
- 25% say they would drive to their destination if the Connect service was not available; 29% would take a Lyft, Uber or taxi; 8% would not make the trip altogether

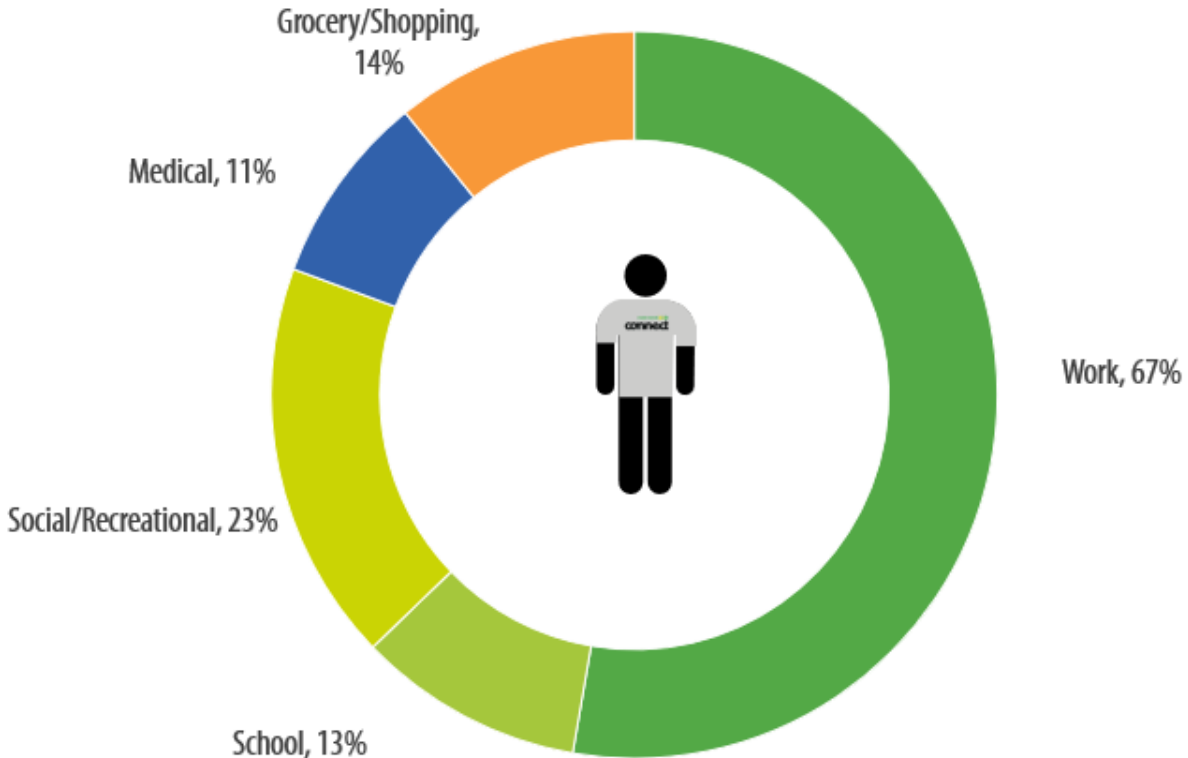
<sup>4</sup> 2017 onboard rider survey & 2018 Marin Access Rider Survey

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take to use Connect—was an expanded service area to downtown San Rafael.

**Survey Results**

**Trip purpose and time:** The primary trip purpose for riders’ trips was for work but showed a healthy mix among other trip purpose categories. Over 55% answered that they travel during both the 6:00 am—9:00 am and 3:30 pm—6:00 pm windows.



**Figure 6: Trip Purpose of Connect User Survey Respondents**

**Age:** Both the median and average age of riders was 46 years old.

**Ride Booking:** 97% of respondents said they booked their ride using the app as opposed to the call-in option.

**Other transportation options:** Nearly 56% of respondents use SMART; 33% use a Marin Transit fixed route service; 13% use a Marin Access service; and nearly 30% use Golden Gate Transit. Eighty-four percent of users said they have access to one or more vehicles.

**How’d you find out?** Over 40% of riders became aware of the Connect service through their employer. Seventeen percent responded that they became aware from a friend or co-worker, and 15% found out through a bus or bus stop announcement.



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**Place of residence:** Most riders surveyed reside in Sonoma County, which is telling as to how Connect is being utilized as a first-last mile solution for SMART commuters to connect to their places of employment.

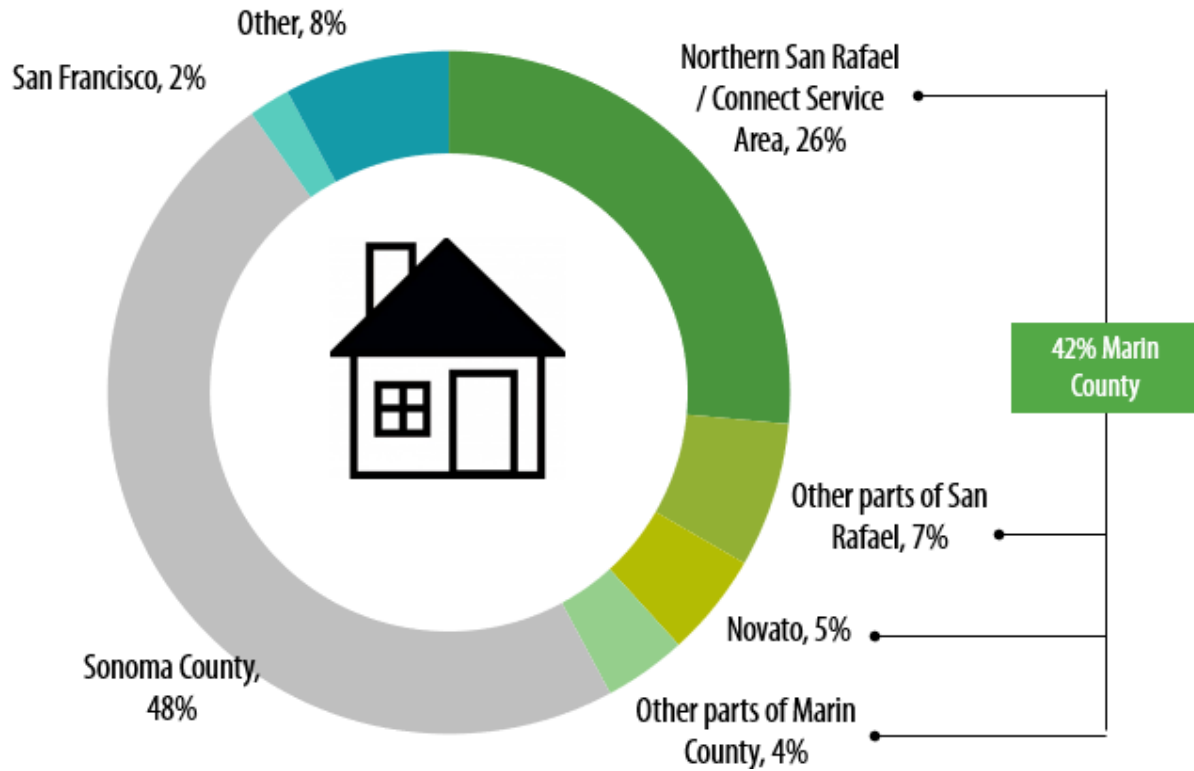


Figure 7: Residence of Connect User Survey Respondents

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**Income levels:** Nearly 50% of all riders have an average household income over \$100,000 per year. The Connect rider tends to be a higher income customer than what is typically noticed on public transit.

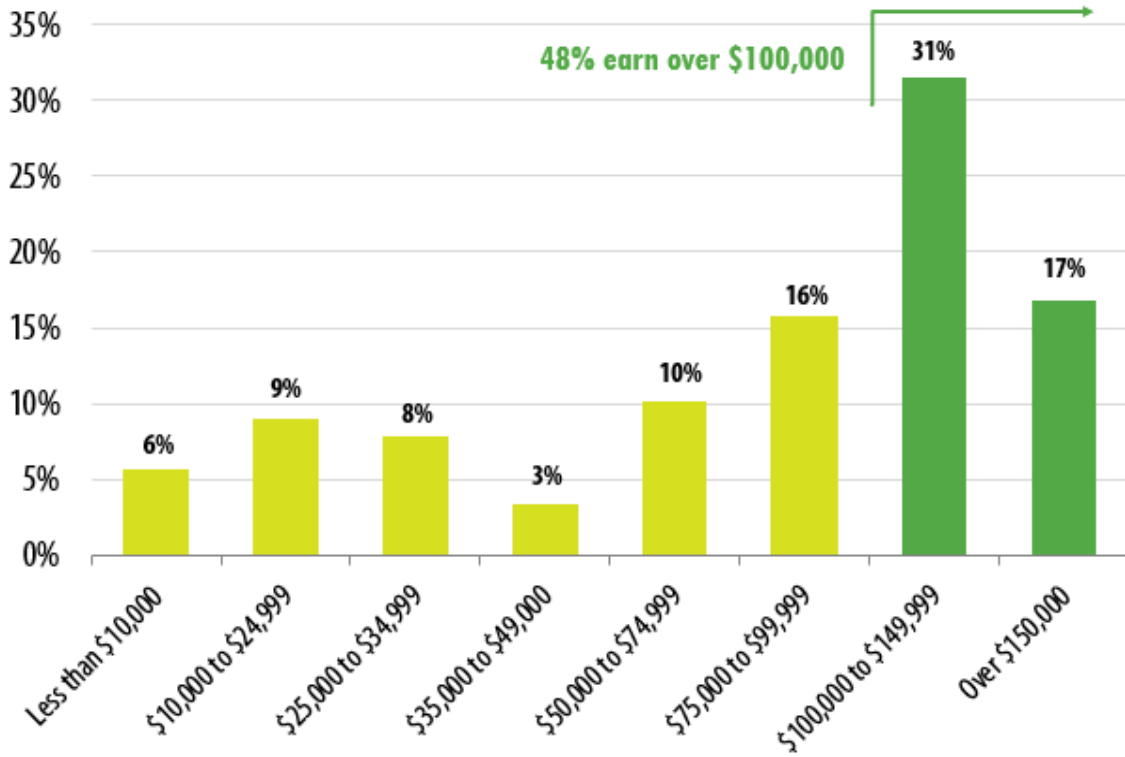


Figure 8: Connect Household Income Levels

**Rider ratings:** On a ten-point scale, 10 being completely satisfied and 1 being completely dissatisfied, components of quality of service received the following ratings:

- Reliability: 8/10
- Cost: 9/10
- Service area coverage: 7/10
- Drivers: 10/10
- Service hours: 8/10
- Vehicles: 9/10
- Customer service: 9/10

**Overall satisfaction:** Riders tend to be satisfied with the service—90% of those surveyed identified as somewhat satisfied (14%), satisfied (23%), or very satisfied (53%). Nearly 90% of rated rides are rated as 5/5. The average ride rating received is 4.8 within the app environment.



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## IV. Data Analysis

### Systemwide Performance

One of the primary factors in selecting the partnership with Via for the on-demand service was the ability to have full access to the data. Via worked with the District to offer standard and custom reports to understand how the app was performing and how the service was performing. Multiple levels of the program were monitored and reporting including:

- App Download Activity
- Accounts Created and Special Type of Account (Employer-Sponsored, WAV/ADA) Created
- Rides Requested and Performed
- Rider Retention
- Pickup Time Estimates and On Time Performance
- Percent of Rides Shared
- Rides by Fare Types and Discounts
- Promo Code Usage

Reporting formats allowed most of these metrics to be filtered by a specific date range to see daily, weekly, and monthly totals.

### App Download Activity

Accounts were monitored using AppsFlyer and were split between Android and Apple Operation Systems. Figure 9 shows the number of times the app was downloaded from the iTunes or Google Play store between program launch and the end of May 2019. In total, the app has been downloaded nearly 2,500 times in the first year since the program launched.

Observations from the download activity show that aside from the first full month of service (June 2018), download activity of the app has been fairly steady, between 100-200 per month. Comparing Android to Apple operating systems, approximately 70% were downloaded for the Apple IOS compared to 30% on Android.

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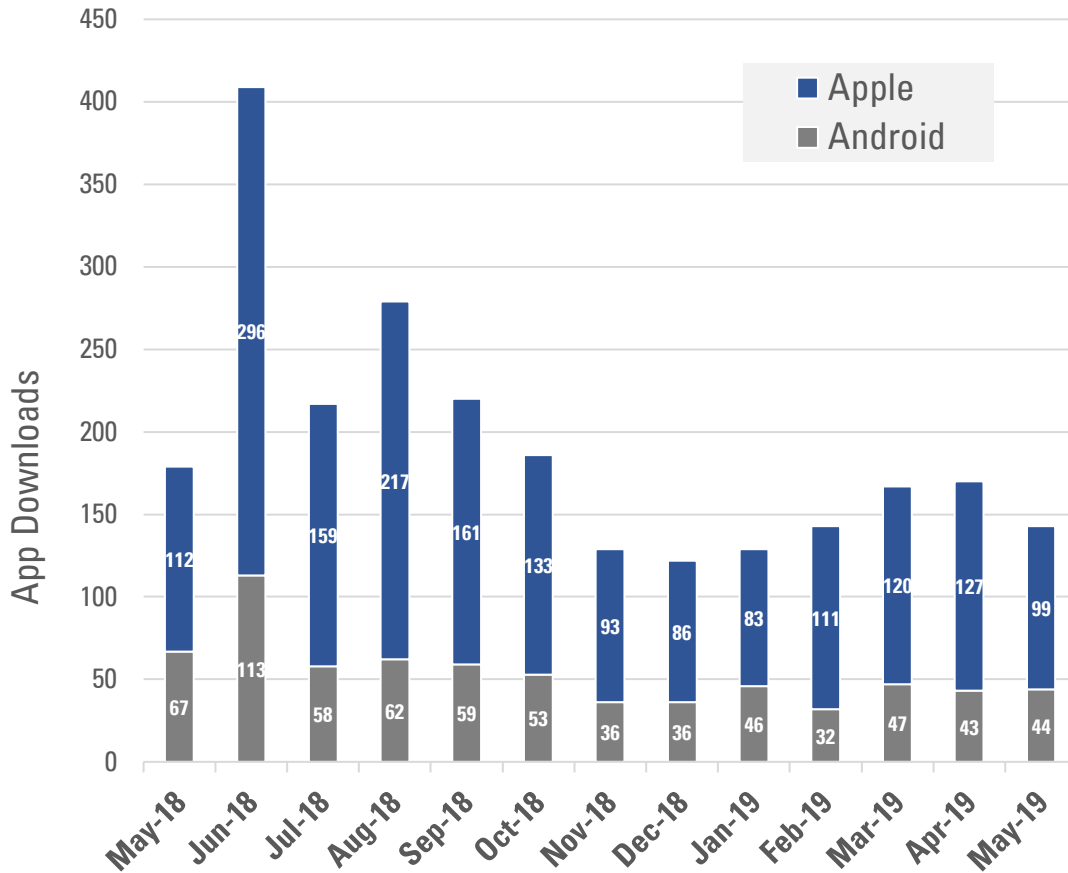


Figure 9: App Download Summary Chart

### Accounts Created

An account is created after the app has been downloaded and the rider profile is created, including credit card information for billing. Compared to total downloads, the number of users that take the next step to create an account is significantly less. Only approximately 1/3 of all downloaded apps turn into accounts. Figure 10 shows that of those who then create an account, only 30% actually tried the service, while the remaining never requested or never took at least one ride.

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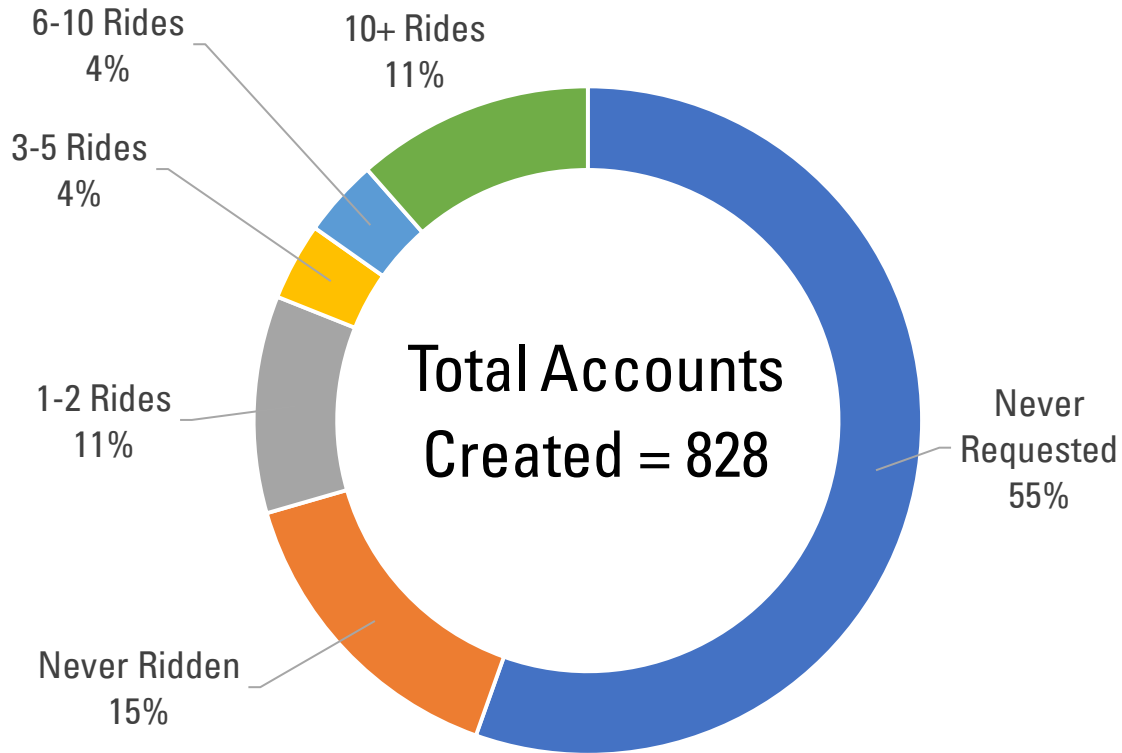


Figure 10: Accounts and Rides Taken

**Requested Rides and Performed Rides**

Requesting a ride and taking a ride is the final step in process after downloading the app and creating an account. Ride requests are recorded when someone opens the app and requests a trip. Requests can either turn into a confirmed ride if the user likes the presented options, they can be denied for a variety of reasons including lack of availability or request parameters are outside the program limits (time or geography), or the request can expire if the rider doesn't like the options provided. Figure 11 shows ride requests and rides performed by month, since the start of service. This chart indicates the following trends in the service

- Monthly totals show continued growth in the first 6 months of service and a leveling of ridership in the last 3-4 months prior to June 2019. Monthly completed ride totals are currently averaging approximately 1,300 trips per month.
- The chart also shows an increase in the percentage of requests that turn into rides and a corresponding reduction in ride refusals and other errors. This is largely attributed to improvements in the app performance and a better match of supply (number of vehicles in service) to demand.
- Ridership drops during November and December attributed to the commuter-based ridership population that did not ride during the holiday season.

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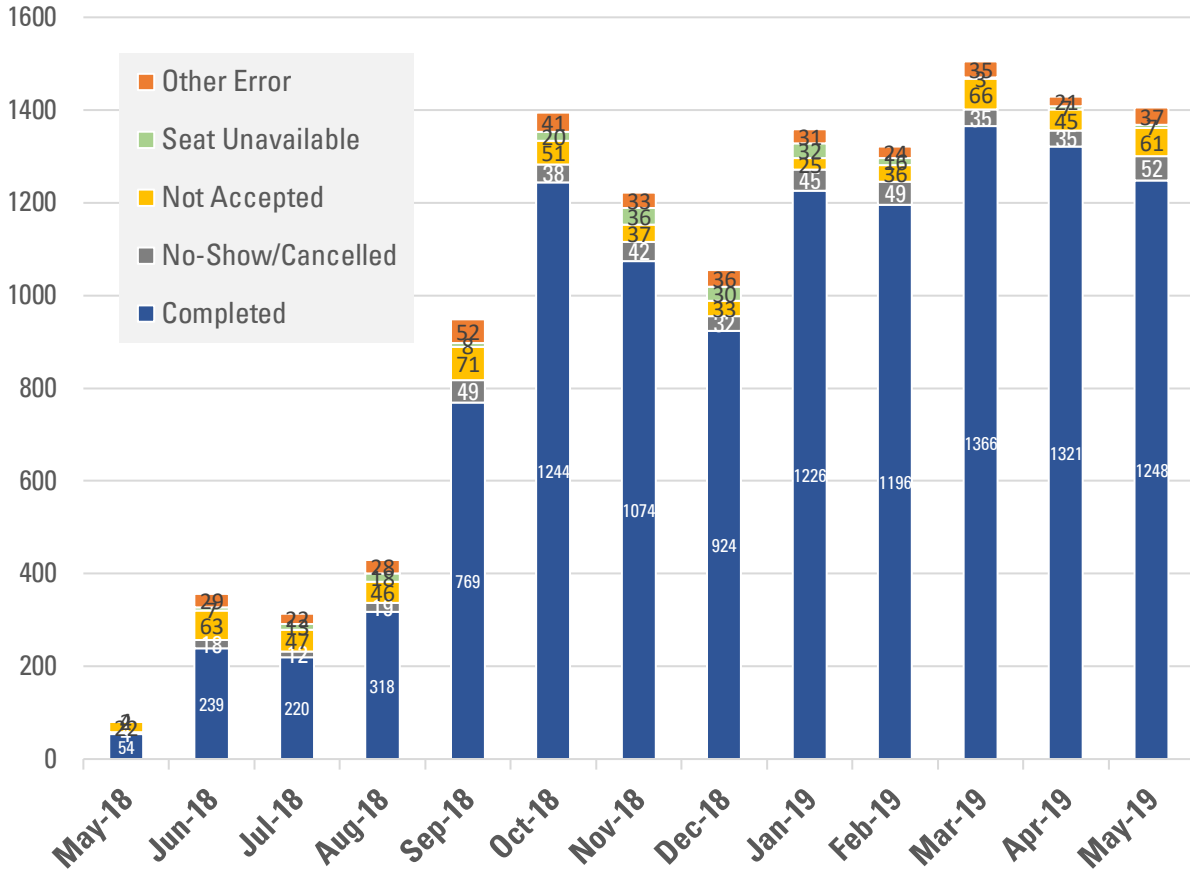


Figure 11: Ride Request Summary

When factoring in the number of service days, Figure 12 shows average daily ridership. The large dips in total ridership are smoothed out a bit for November and December in this chart. Overall, daily ridership has average over 50 passengers per day since October of 2018, with averages growing to over 60 per day experienced in recent months.

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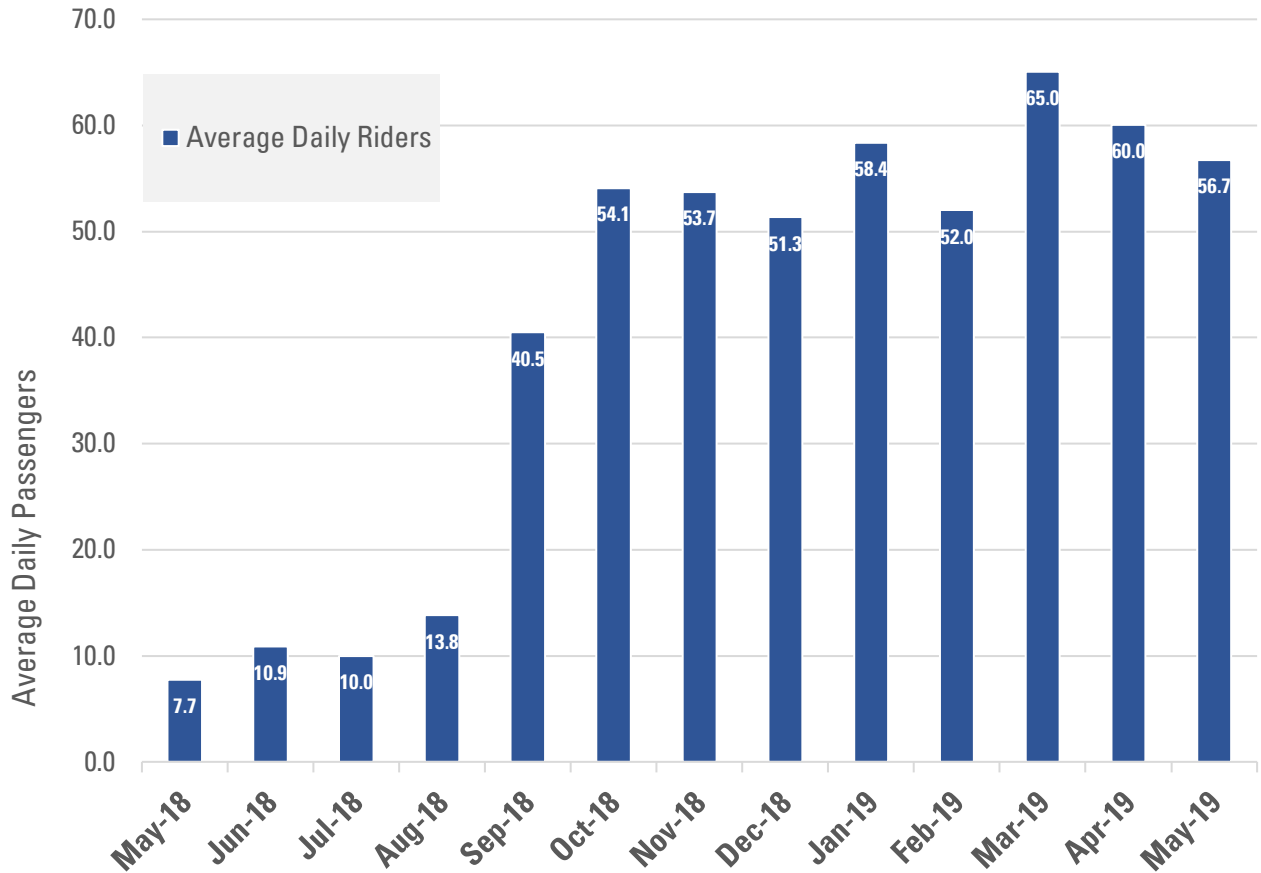


Figure 12: Average Daily Ridership

Using ridership data from January thru April 2019, Figure 13 shows the average number of daily riders, by hour for the service. The figure demonstrates the exaggerated demand due to commuters during the 6:00-9:00 am hours and between the 3:00-5:00 pm hours. During these hours, total trips per hour average between six and 12 passengers. The off-peak hours average three passengers or less per hour.

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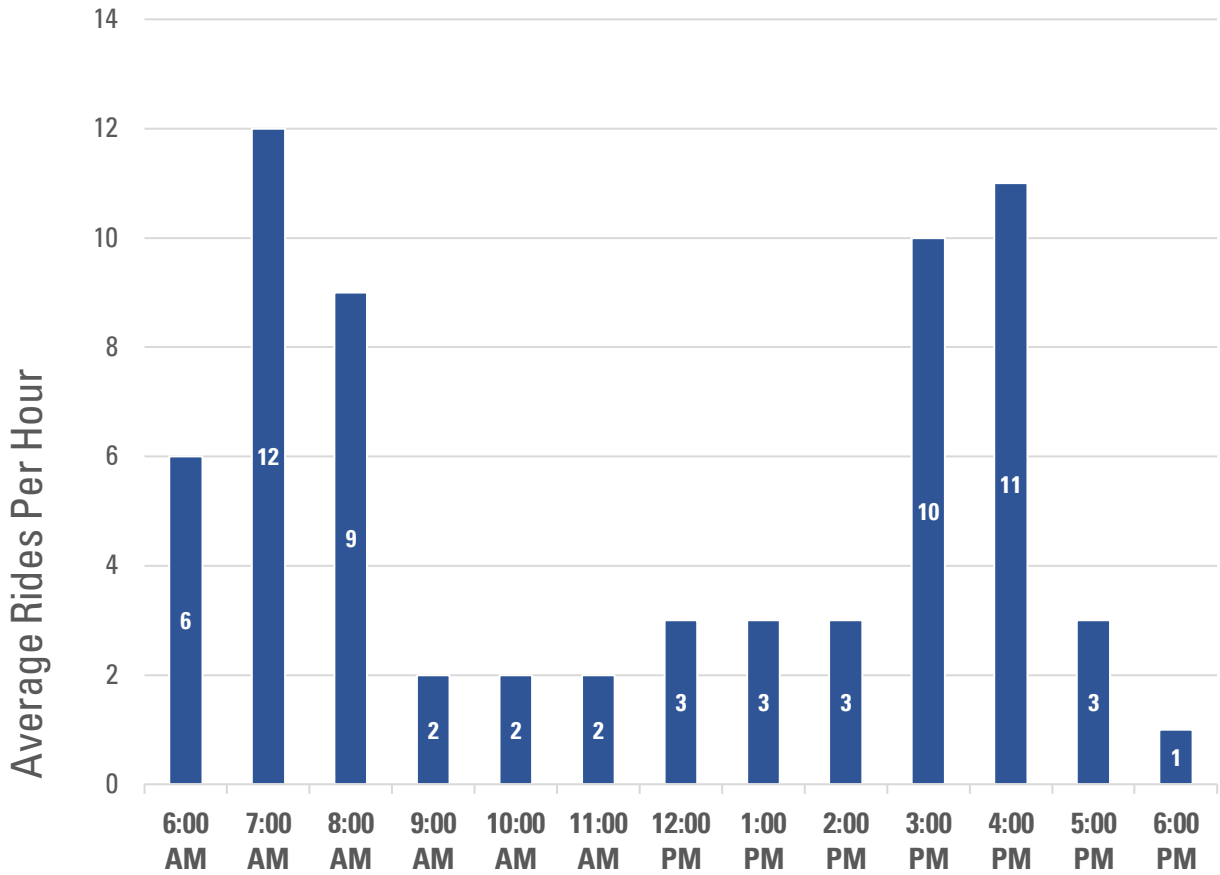


Figure 13: Rides by Hour of the Day

Another trend observed in the Connect program is a growing number of average trips per rider as the program has developed. Figure 14 shows the average number of trips per rider has slowly grown to approximately 12 per month.



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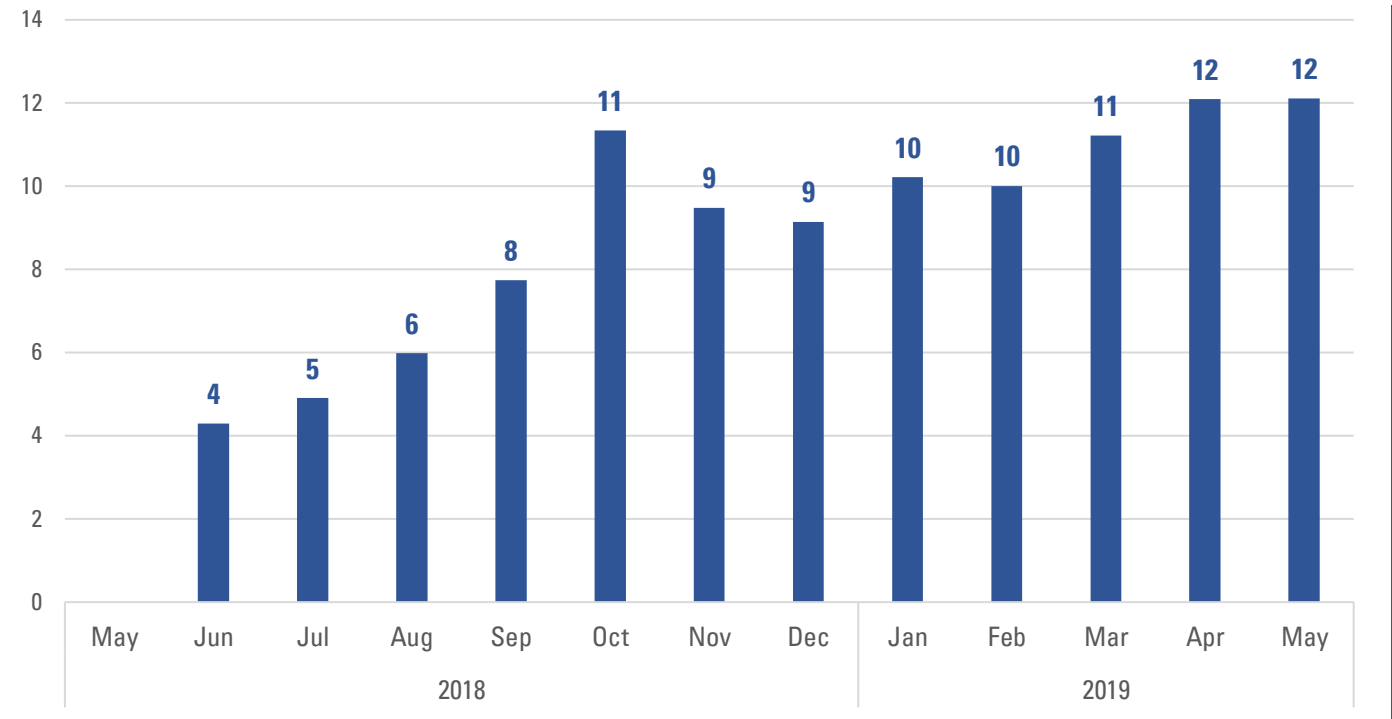


Figure 14: Average Trips per Rider by Month

### Productivity

Productivity is measured by the District in terms of passenger trips per revenue hour of service. This metric indicates utilization of the service. In traditional demand response services, passengers are required to schedule at least a day in advance. This advanced scheduling helps to ensure the right amount of service, or supply, is provided to meet the demand. Due to the inexperience with this type of program and the on-demand nature of the service, estimating the needed supply to meet the anticipated demands has been an ongoing effort.

Early in the pilot period, service was oversupplied to ensure new riders would have a positive experience and continue using the service. Added supply was also needed during the software development stages when the batching algorithms were still being refined and ride matching was not functioning as well as it does today. These factors, along with low initial ridership, showed very low productivity in the early stages of the program (less than 1 passenger per revenue hour). As ridership has matured, the technology has advanced, and supply levels have been adjusted to respond to stabilized demand trends, productivity has steadily increased. Figure 15 below shows the average monthly productivity trends since the start of service.

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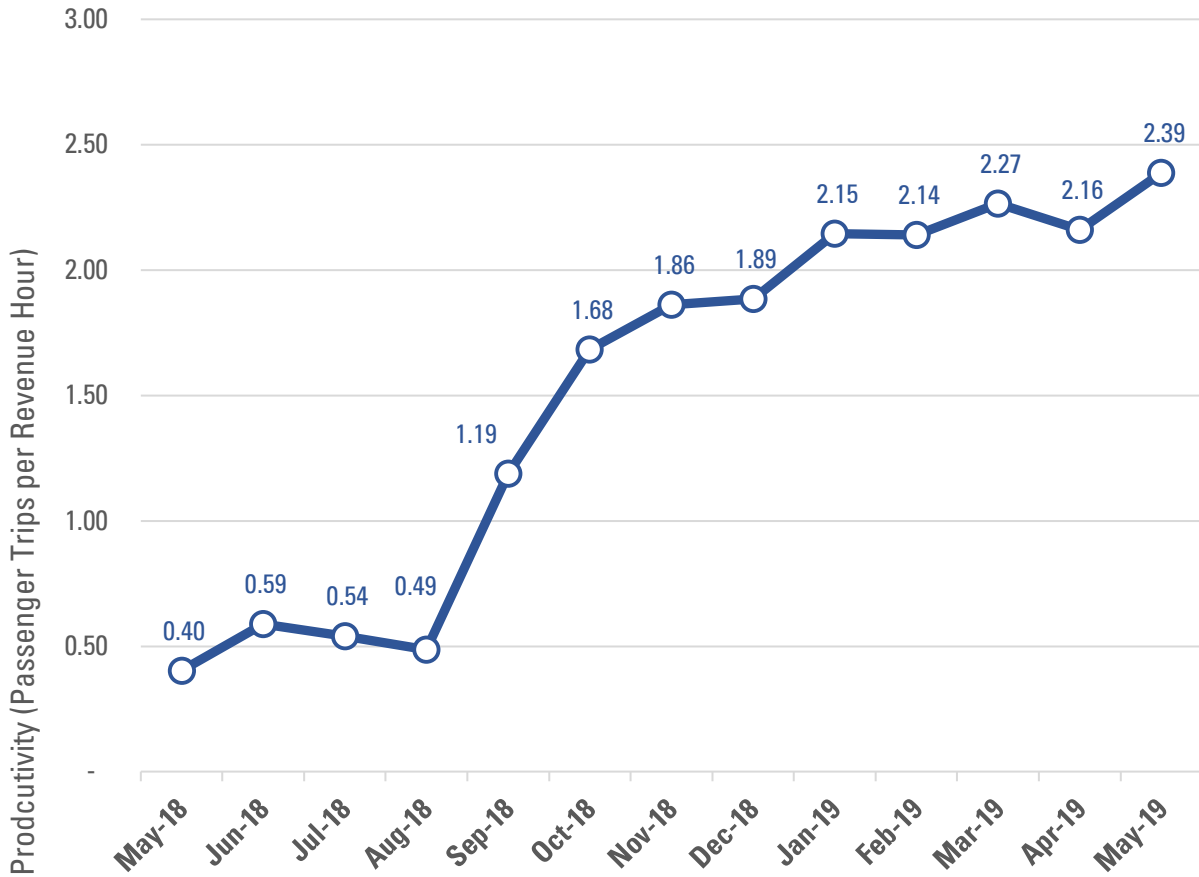


Figure 15: Productivity

### Rider Retention

Rider retention measures how many riders return to use the service after their first use and month over month. Rider retention provides a metric of satisfaction based on continuing to make trips after trying the service. Figure 16 shows approximately 100 riders per month actively use the service, with 90% being return riders and 10% new.

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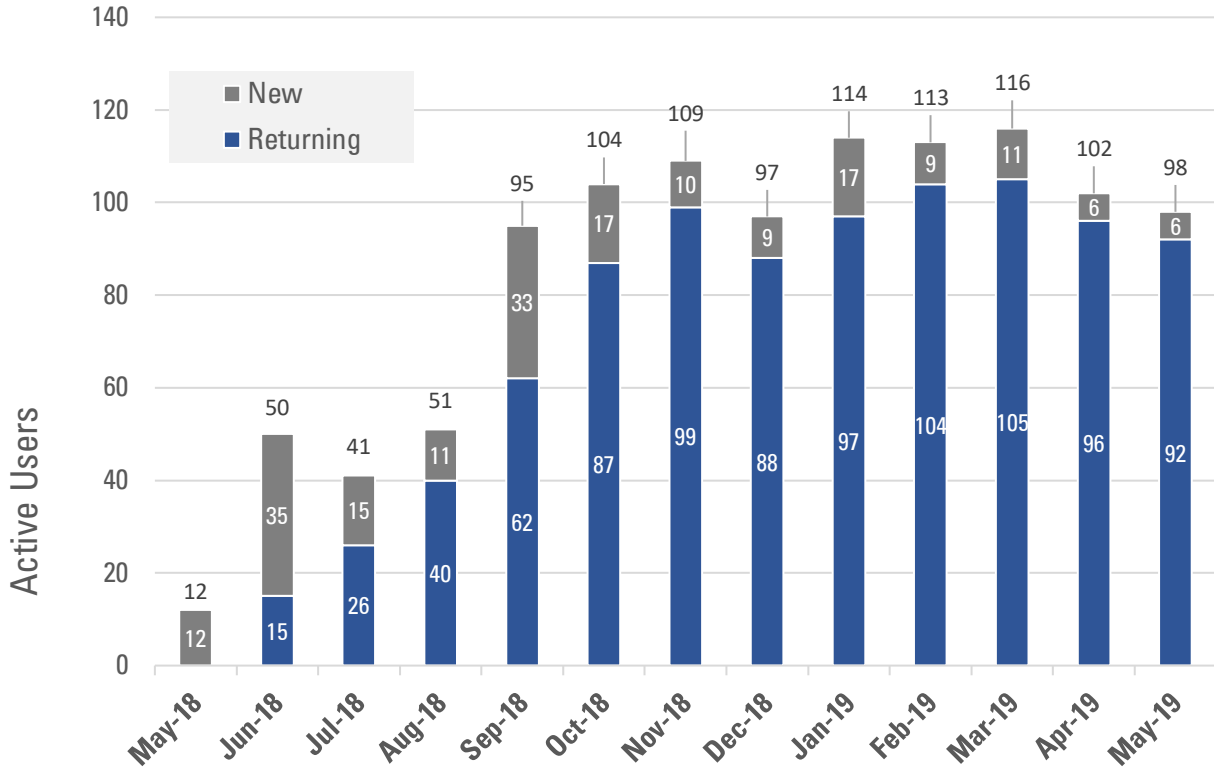


Figure 16: Rider Retention

Ridesharing

One of the primary objectives of the District is to reduce congestion on Marin County roadways by offering high capacity transit services. While Connect is primarily focused on improving mobility and access and less focused on capacity like other transit service typologies, it’s still looking to take single occupant vehicles off the road and provide alternatives to driving. The partnership with Via aligned with this objective since their platform is designed as a ridesharing platform.

Figure 17 below shows the percent of all rides that were shared, by time of day, since the start of the program. The highest percentages of shared rides occurred during the peak commute hours, specifically in the morning hours when most trips are originating from a single location – Civic Center SMART station. The lower percentages of ridesharing during the midday hours reflect the low ridership that occurs during these hours and the limited opportunities to share rides.

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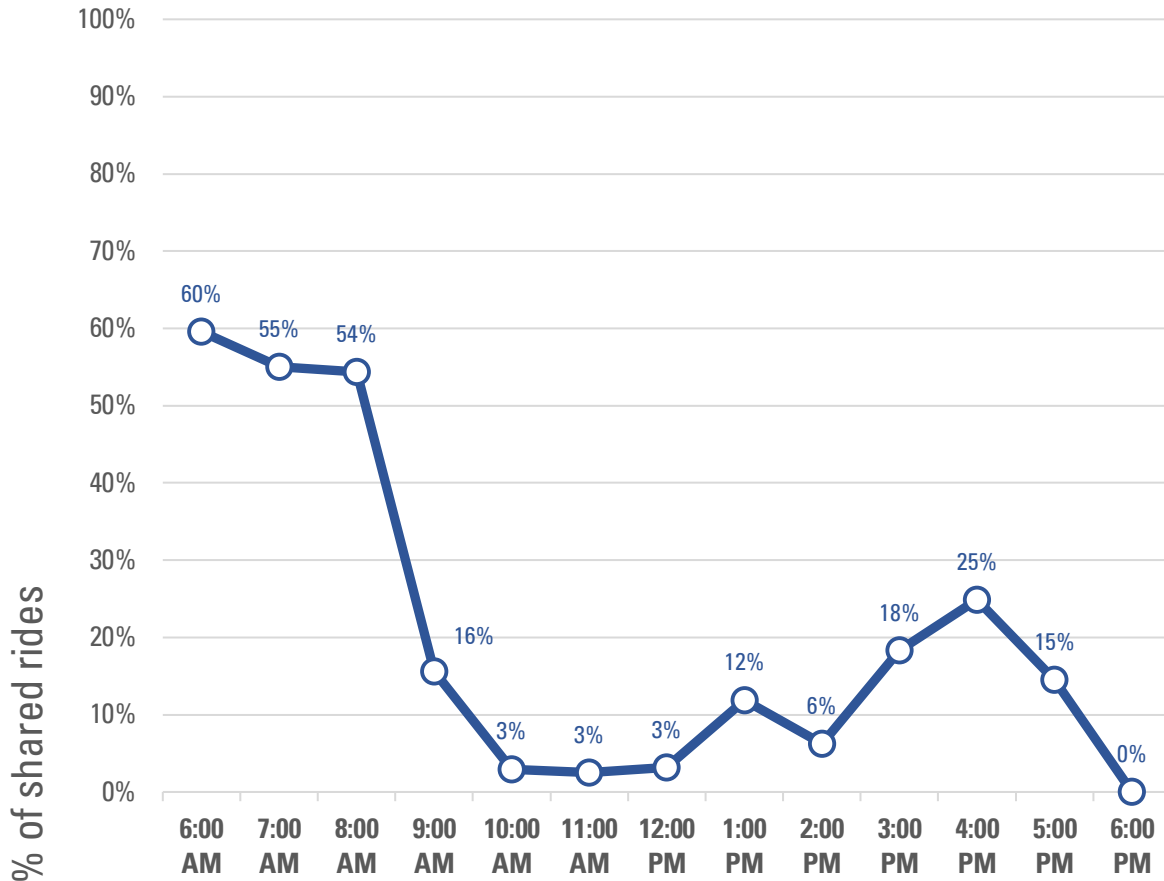


Figure 17: Ridesharing Percentages by Time of Day

### Fare Media

Connect is the only program offered by Marin Transit that is completely cash free and the only program that allows integrated payment within the app. The pricing structure recognized the premium nature of the service, but the small travel area offered. An initial base fare of \$4.00, twice the fixed route and ADA paratransit fare, was established. Since the payment was not integrated with the fixed route or Marin Access media products and there was desire to encourage use of Connect as a first or last mile connection to the existing public transit service, discounts were offered for riders who started or ended their trip at an existing bus or rail station. A final 50% discount was offered for riders who qualified for the Marin Access programs. Finally, an unlimited month pass was offered at \$40 per month. Additional information on the pricing structure can be found in Section II.

Figure 18 shows the distribution of fare payment as a percentage of total rides. The chart shows that only 11% of trips made paid the full \$4.00 fare while 51% paid the \$2.00 fare offered through the bus stop discount. Only 7% of all trips received the Marin Access 50% discount and the remaining 31% of trips were made on an unlimited pass product. It should also be noted that 47% of trips had their fares paid by the employer through the partnerships with the County of Marin and Kaiser. Unsurprisingly, all monthly pass



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purchases were made by the WAV/ADA and other non-employer markets since employee rides are paid for by respective employer, and Marin Transit would invoice the employers on a quarterly basis.

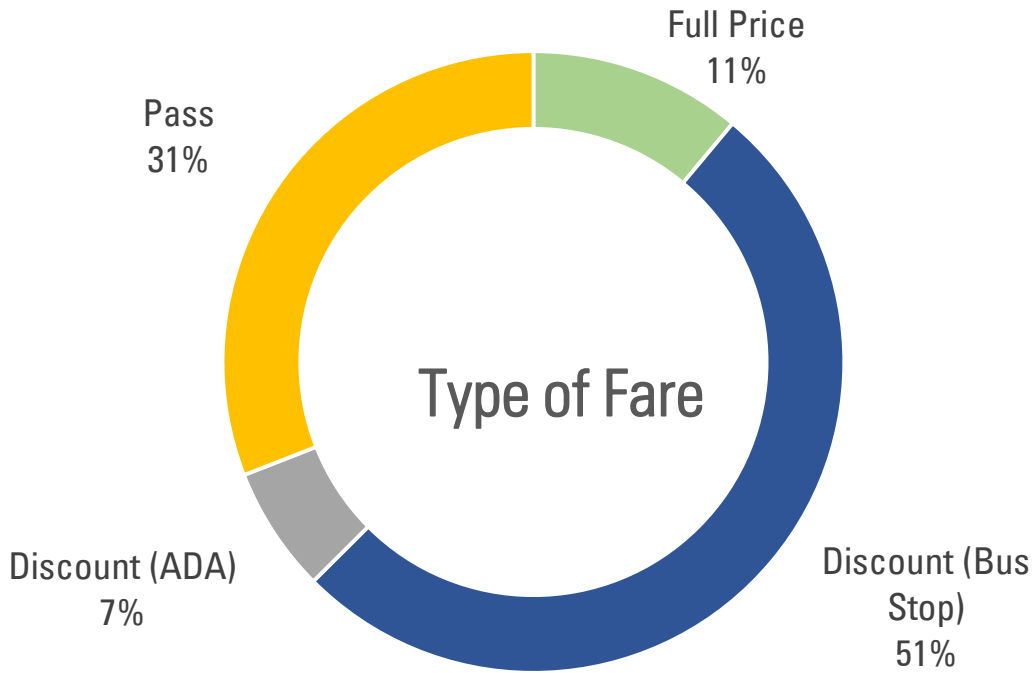


Figure 18: Fare Payment Distribution

### Trip Request and Ride Statistics

The experience of the rider is a function of the app’s performance as well as the supply and demand conditions. The goal of the program was to create attractive ETAs (estimated time of arrival) for riders but also being mindful of costs and oversupplying service that can lead to low productivity. The District selected a 30-minute parameter for the maximum wait time. If demand exceeded this parameter, the app would indicate the rider that all seats were full and to ask the rider to try back later.

Based on these settings, Table 3 shows trip request and ride statistics by quarter.

**DRAFT****Table 3: Connect Ride Statistics**

		FY 2019/20				Total
		Q1	Q2	Q3	Q4 <sup>(1)</sup>	
Avg Wait Time for Pickup (min)		7.15	7.56	7.58	8.31	<b>7.73</b>
% On Time Arrival for Pickup	Within +/- 3 min.	84%	79%	84%	80%	<b>82%</b>
	Within +/- 5 min.	94%	93%	94%	93%	<b>93%</b>
Average Trip Length (Time, min)		7.61	7.50	7.53	7.45	<b>7.51</b>
Average Trip Length (Distance, mi.)		1.2	1.1	1.1	1.1	<b>1.1</b>

1. Date includes April 1-June 18, 2019

The District's desire to keep ETAs below 10 minutes has been met in all quarters during the first year. As supply has been adjusted to better target demand, ETAs have slightly increased over time. On time performance exceeds the District's standard for fixed route services and continues to perform at a reliable level for riders.

The trip length statistics reflect the relatively small service area geography and the types of trips the program is accommodating. The average trip length is approximately one mile which reflects the strong demands for the service as a first/last mile connection from the SMART station. The average travel time of these short trips (~8 minutes) reflects the high percentage of shared rides (shared origins and destinations) the system is accommodating during those peak commute hours.

### Market Segmentation

Via also worked closely with the District to segment ridership and trip data based on the goals of the pilot, including those associated with an Employer sponsored program (County of Marin and Kaiser), those eligible for Marin Access services or in need of an accessible vehicle, and a third category for all others. The segmentation of the markets was done to allow the District to determine if a single mobility service like Connect can feasibly serve multiple unmet needs from these different markets. Parsing out the data by markets provides the District an opportunity to apply and compare typical transit performance metrics (productivity and subsidy) to the service.

The District offers a wide variety of service targeted at various markets of riders including regular commuters, students, senior/ADA, recreational visitors, etc. These various services types are classified as service typologies in the Short Range Transit Plan and performance metrics are adopted for each. Table 4 shows how these metrics differ between the various types of services. The variation in these performance targets recognizes the differences in services and cost to provide the service.

**DRAFT****Table 4: Typologies and Performance Targets**

Route Typology	Routes	Productivity Target (minimum)	Subsidy Target (maximum)
Local Trunkline	35, 36, 71	20 passengers/ REV HR	\$4.50/passenger
Local Basic	17, 22, 23, 23X, 29, 49	18 passengers/ REV HR	\$6.50/passenger
Local Connector	219, 228, 233, 245, 251, 257	8 passengers/ REV HR	\$9.00/passenger
Supplemental	113, 115, 117, 119, 125, 139, 145, 151, 154	20 passengers/TRIP	\$3.00/passenger
Rural	61, 68	6 passengers/ REV HR	\$12.00/passenger
Recreational	66/66F	25 passengers/ REV HR	\$3.00/passenger
Demand Response	Local Paratransit, Dial-A-Ride	2 passengers/ REV HR	\$35.00/passenger
Partnership	122 (College of Marin Express)	<i>no target</i>	<i>no target</i> <sup>(1)</sup>

Developing performance targets at the start of the pilot was challenging because it wasn't clear how the service would be used and who would benefit from the new offering. The decision to make it a fully accessible, curb-to-curb, general public service didn't preclude any particular market from being served. Thus, if a program level target needed to be developed, it should be done only after understanding the type of mobility the program was supporting.

The discussion of performance targets should also capture the qualitative benefits offered by the new service. These include the following;

- **Convenience.** Connect offers an on-demand, curb-to-curb service within the service area. This is the only public transit service that offers this high quality connection and can be booked without advanced reservation.
- **Enhanced Communication.** The app powered service allows riders to get precise pick up time estimates and allow a visual tracking of the driver and vehicle throughout the trip. These predictions are specific to the requested trips and give the rider more information in the trip planning and trip making process.
- **Integrated payment.** Connect is the only public transit service offered by the District that allows a credit card to be placed on file and payment deducted automatically following a completed trip. While the Clipper program offers a similar system for fixed route, it still requires the user to engage during the trip to tag on and off.
- **Accessibility.** Marin County lacks taxi providers and TNC operators with wheelchair accessible vehicles. Connect is the only same-day travel option for

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riders in wheelchairs who are unable to transfer from a wheelchair to a vehicle seat. Further, Connect drivers are fully trained to work with riders with special needs and go through the same testing practices and procedures as all other transit operators.

These unique program characteristics make it challenging to compare Connect to the performance of the other services offered by the District. Programs currently offered by the District that deliver similar types of services include traditional demand response service (paratransit, dial-a-ride), local connector fixed route services, and partnership services that includes the College of Marin express Route 122. Table 5 below shows productivity (passengers per revenue hour) targets for these programs and Table 6 shows cost effectiveness targets (subsidy per trip) for these programs.

**Table 5: Productivity Targets for Similar District Programs**

Connect Market	District Typology Match	District Typology Productivity Target (minimum)	FY 2017/18 Performance
Senior/ADA Trips	Demand Response	2.0 pax/rev hour	2.1 pax/rev hour
Employer Sponsored	Partnership	None identified	11.4 pax/rev hour
Regular/Other	Local Connector	8.0 pax/rev hour	9.1 pax/rev hour
<b>Suggested Target</b>		<b>4.0 pax/rev hour (suggested)</b>	<b>2.2 pax/rev hour</b>



**DRAFT****Table 6: Cost Effectiveness Targets for Similar District Programs**

Connect Market	District Typology Match	District Cost Effectiveness Target (maximum)	FY 2017/18 Performance
Senior/ADA Trips	Demand Response	\$35.00 per passenger trip	\$40.05 per passenger trip
Employer Sponsored	Partnership	None identified	\$5.89 per passenger trip
Regular/Other	Local Connector	\$9.00 per passenger trip	\$9.96 per passenger trip
<b>Suggested Target</b>		<b>\$15.00 per passenger trip (suggested)</b>	<b>\$39.48 per passenger trip</b>

Connect ridership (showing data since start, since stabilization, and projected) was segmented in order to understand travel behavior, the cost and levels of subsidy Marin Transit was segmented to each market. Segmented markets include employer sponsored programs (County/Kaiser), WAV/Marin Access, and other.

Since the start of revenue service in July of 2018 thru May 2019, the Connect program has provided 10,576 rides, and nearly 47% of those rides have been associated with an employer program with roughly a 70%/30% split between Marin County and Kaiser employees, respectively. WAV/Marin Access rides account for 8% of total rides, while 45% are categorized as other (non-employer, non-WAV/Marin Access). Figure 14 shows a month by month segmentation of rides by market. Looking at ridership trends, there has been steady growth since the official launch of the employer programs with the County and Kaiser.

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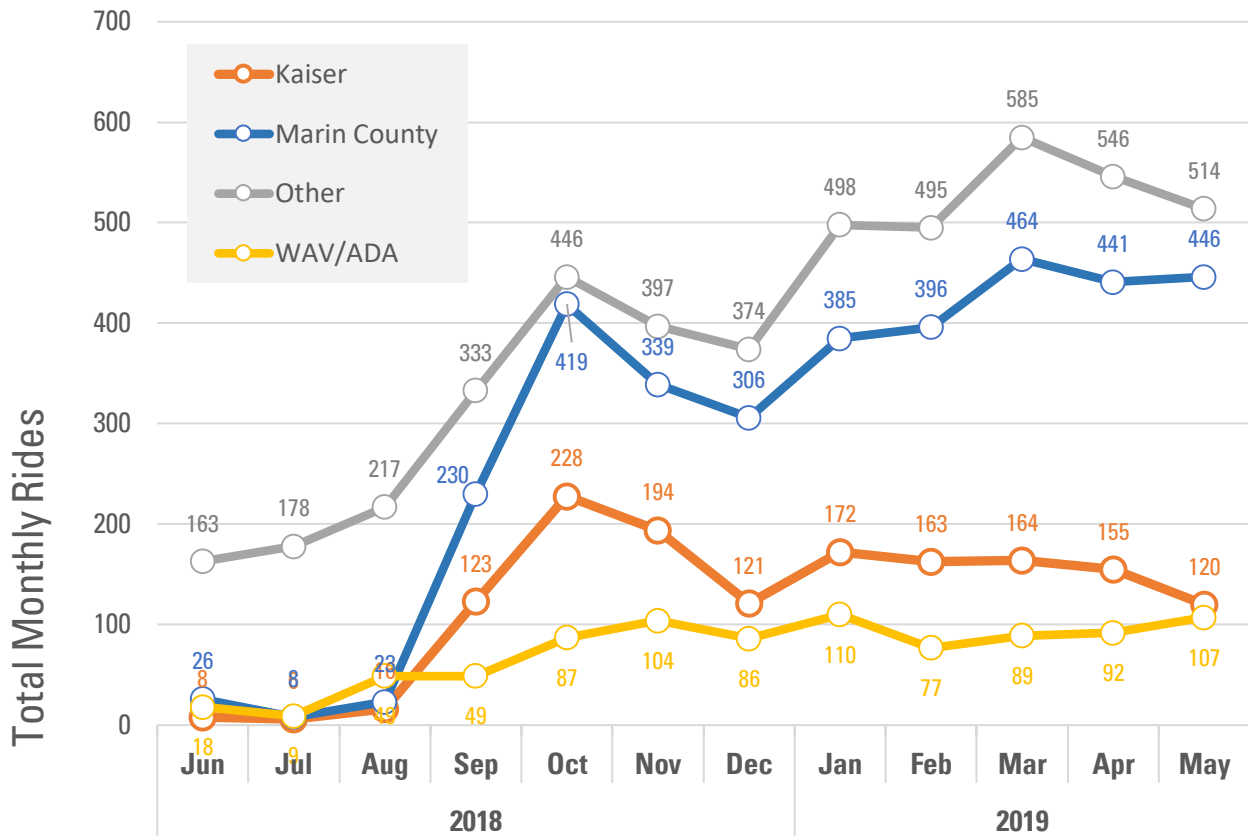


Figure 19: Monthly Ridership Segmented by Market

Connect experiences heavy utilization by the employer markets during the AM peak period (6:00 am-9:00 am) and the PM peak period (3:00 pm-6:00 pm). On average, nearly 20% of the rides in the AM peak are associated with Kaiser accounts and over 40% are associated with Marin County accounts. In the PM peak, the share of Kaiser and Marin County rides drops to 12% and 35%, respectively, which is attributed to more frequent outbound SMART trains which spreads demand throughout the afternoon. For the WAV/Marin Access market, the highest share of rides occurs during the off-peak period from 10:00 am until 3:00 pm, demonstrating where much of the senior-ADA activity occurs on the system (over 40%). Figure 15 provides an hour-by-hour break down of the share of rides by each market.

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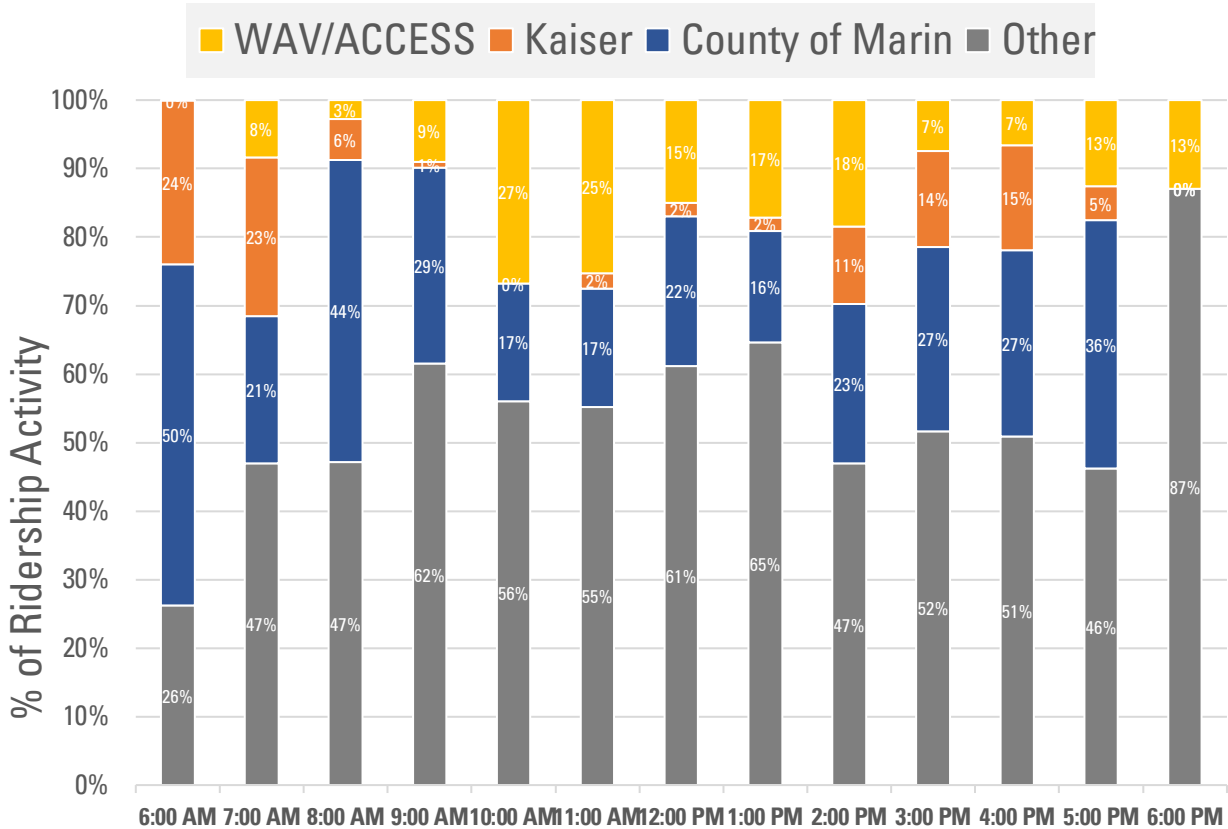


Figure 20: Market Segmentation by Service Hour

Understanding the market segmentation by hour of service is a helpful exercise to ultimately assign driver hours to each segmented service hour to allocate costs to determine passenger subsidies shown in Table 5 and Table 6. Reviewing activity throughout the day, there is high activity by the employer markets throughout the AM and PM peak periods and a modest, but consistent level of utilization by Marin County employees throughout the day.

Understanding that almost half of activity on Connect is driven by the Kaiser and Marin County employee markets, the total number of active users per employer was calculated by month to see how each program was retaining patrons. Figure 21 displays the monthly breakdown between Kaiser and Marin County employees—where there has been consistent utilization from 24 to 28 Marin County employees and decreasing usage by Kaiser employees since the programs officially began in September of 2018. There was a high of 22 Kaiser employees taking rides in October of 2018, but most recently that monthly number averages 13 users since January of 2019. For the County, the average in 2019 is about 27 monthly users.

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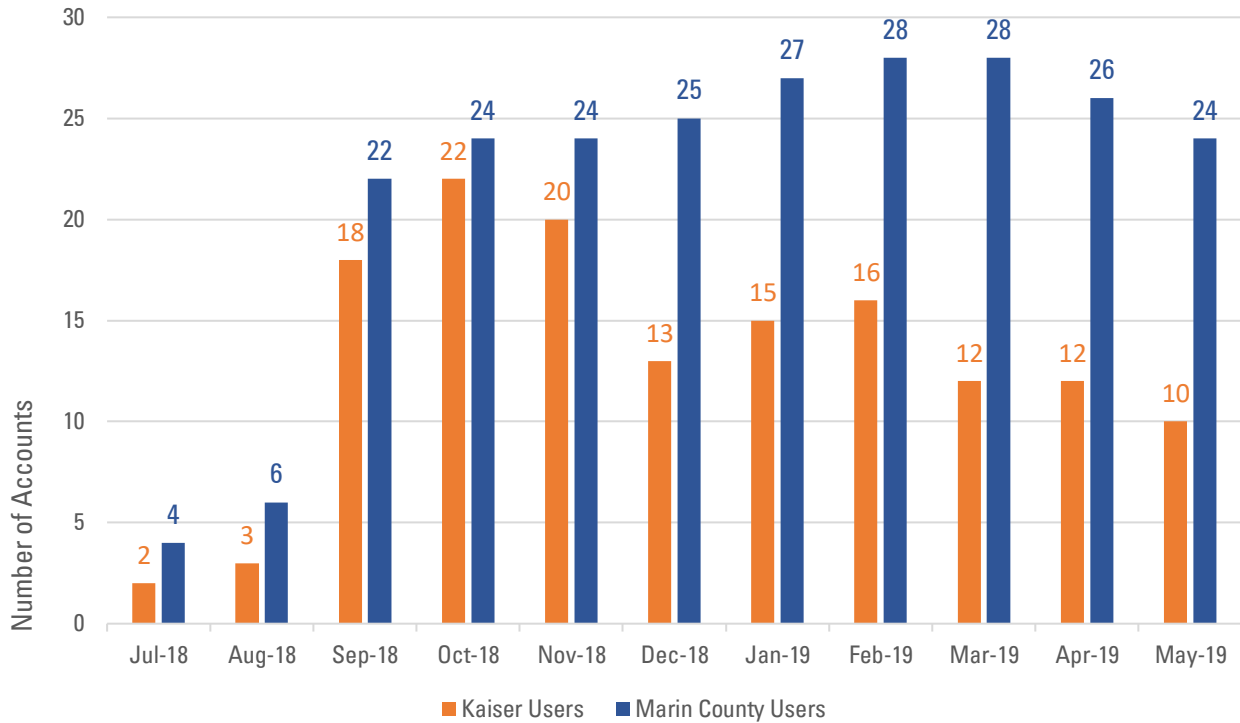


Figure 21: Active Employee Accounts

Figure 22 separates average trips per employer by month. Interestingly, despite less Kaiser employees utilizing Connect, the average trips by each user trends consistently averaging 12 trips per month in 2019, whereas average trips for Marin County employees trends positively and averages 16 trips per month.

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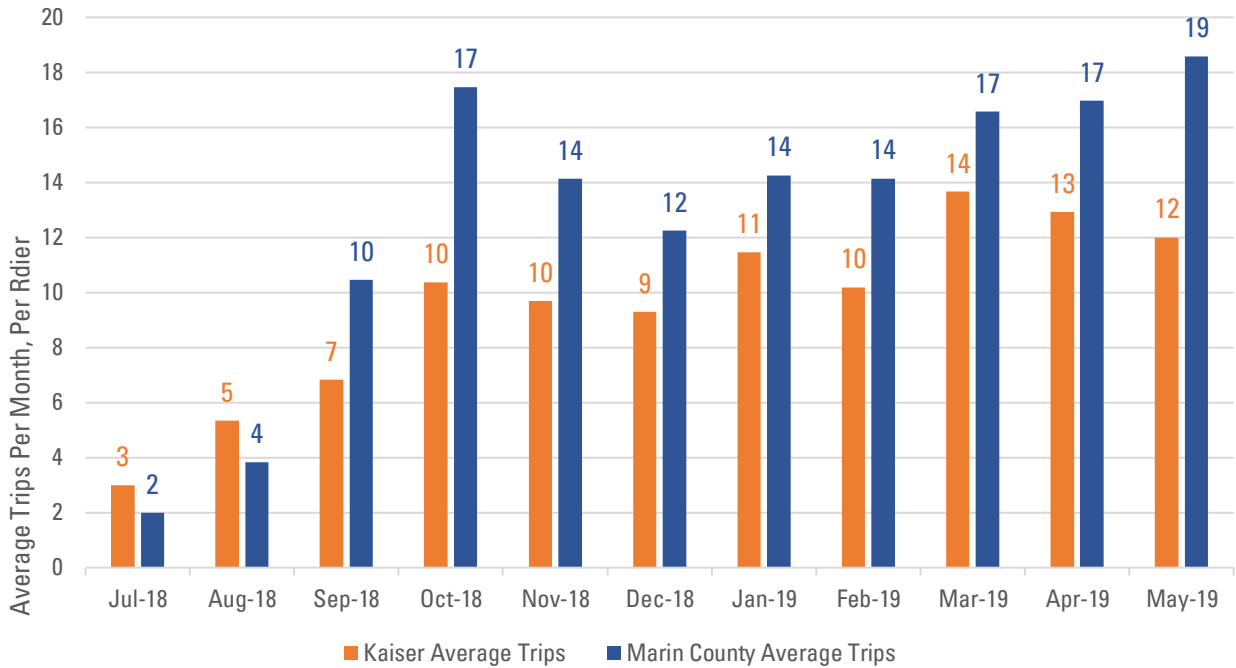


Figure 22: Average Employee Trips

Subsidy per passenger for each market was calculated by allocating monthly operating costs to each market by multiplying the total number of revenue hours (by time of day) and the percent of rides taken by each market (by hour of day). Productivity was determined by the ratio of monthly passengers and revenue hours allocated to each market. Table 7 shows these results for the period July 2018-June 2019 (estimate) and Table 8 shows these results January-May in 2019.

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Table 7: Annual Performance Estimate

Connect Market	District Typology Match	Passenger Allocations	Driver Hours Allocations	Subsidy per passenger	Productivity
Senior/ADA Trips	Demand Response	8%	11%	\$70.18	1.10 pax/hr
Employer Sponsored: Kaiser	Partnership	14%	10%	\$35.49	2.02 pax/hr
Employer Sponsored: County	Partnership	33%	27%	\$39.87	1.81 pax/hr
Regular/Other	Local Connector	45%	52%	\$61.28	1.26 pax/hr
<b>TOTAL</b>				<b>\$52.70</b>	<b>1.47 pax/hr</b>

Table 8: January 2019-May 2019 Performance (Software Stabilization Period)

Connect Market	District Typology Match	Passenger Allocations	Driver Hours Allocations	Subsidy per passenger	Productivity
Senior/ADA Trips	Demand Response	8%	11%	\$54.13	1.62 pax/hr
Employer Sponsored: Kaiser	Partnership	13%	10%	\$27.59	2.88 pax/hr
Employer Sponsored: County	Partnership	35%	32%	\$33.03	2.44 pax/hr
Regular/Other	Local Connector	44%	47%	\$42.46	2.06 pax/hr
<b>TOTAL</b>				<b>\$39.48</b>	<b>2.22 pax/hr</b>

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## V. Findings

Although the Connect service is still viewed as a new service and is continuously evolving, there are some findings that should be highlighted based on the first year of service.

### Rider Profile

The survey data and ridership data give insight on who has naturally been attracted to the service and those who have slowly adopted the service through marketing and outreach. In general, the primary market who embraced the Connect service is the first/last mile SMART commuter. These riders focus demand around the peak hour train arrival/departures at the Civic Center SMART station. Approximately 33% of this market are employees associated with the County of Marin, 14% are employees associated with Kaiser, and the remaining 45% are employees associated with other employment-based destinations including schools (Terra Linda High School, Mark Day, Marin County Office of Education, etc.), businesses located along Redwood Frontage, and businesses located along Smith Ranch Road.

While these riders are not necessarily new to transit, they are new to Marin Transit services. A small percentage of riders (13%) indicated using other Marin Access programs prior to riding Connect but only 33% indicating using other Marin Transit Service. Other significant differences in rider profiles compared to typical Marin Transit fixed route riders include higher income levels and greater access to personal vehicles.

### Community Benefits

Marin Transit Connect has increased available options for travel in a relatively small geographic area of the County. While this small geography has likely limited the scale of the program and number of natural origins and destinations for residents and employees, it has shown success in supporting community needs.

The first example is related to employers in the area. Prior to Connect, the largest employers, County of Marin and Kaiser, offered their employees a dedicated shuttle that provided transportation to and from their employment sites. While this was a convenient service for their employees, it did not serve others who worked at adjacent locations, even when capacity was available. In total, approximately \$400,000 was invested by these two employers for this service.

After the launch of Connect, these two large employers decided to cancel their dedicated shuttle programs and pay the Connect fares on behalf of their employees. This change allowed these employers significant savings in shuttle operations, contract management, and customer service. As a public transit service, Connect serves other employees in the service area that do not work for these two employers.

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Other successes have been observed by the senior and ADA community. Several examples of increased mobility and independence including:

- A middle school rider who attends Miller Creek Middle School. This individual relies on yellow school bus service to get to and from school but did not have options to attend after school programs and other unplanned social events. Connect has been used regularly to get to these after school programs and then back home.
- Marin Ventures is a day program for developmentally disabled adults. Located within the service area, staff often use Connect to take participants on social outings including Northgate Mall. Connect reduces the need for the program to have drivers and vehicles on hand to service these trips needs. The accessible vehicles allow all participants to join on these outings.
- Rotary Village is a Senior Residential facility located off Lucas Valley Road. The remote location results in a very long walk to access any fixed route services. Although this location is within the ADA paratransit service area, Connect has been used as a resource for those who do not qualify for paratransit or those who choose not to pre-schedule their ride.

### Role in the Transit Network

Transit agencies, including Marin Transit, have been grappling with the concept of on-demand or microtransit and what role it plays in the overall delivery of service. Marin Transit, unlike many of its peers, is fortunate to have funding and Board support to test out new models for service delivery including Connect. This pilot has provided invaluable insight for Marin County and the other transit agencies.

Based on the first year of operations, some general conclusion can be drawn as outlined below:

- While productivity has been slowly increasing month over month, it will likely never reach the same levels as fixed route transit. Connect has shown a steady growth resulting from increased ridership and adjustments to supply. However, at best, it is predicted that productivity will not surpass 5 passenger trips per hour.
- Agency operated service is significantly more expensive than other on-demand delivery models. This is no surprise but it is important to recognize that transit agencies have high standards for driver training and performance that result in relatively high operating costs. In the case of Marin Transit specifically, the paratransit operations and maintenance contract includes a significant amount of fixed fees associated with administrative staff traditionally needed to support on-demand operations. These administrative fees include scheduling, dispatch, customer service, and management staff. Many of these administrative costs are



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not needed due to the automation of the software so there could be future cost savings if the service was re-bid as a stand-alone operation.

The other added costs specific to Connect's operation is the payment of driver and overtime time when vehicles are not servicing rides. Traditional demand response services allocate drivers and service hours based on pre-scheduled demand. Revenue hours form the basis for compensation since the demand is predictable. The Connect service is on-demand and there is no way to guarantee when and how much demand will occur at any given time. Thus, the payment agreement is to compensate for time when the vehicles are **available** for service (in the service area and signed into the app) as **opposed** to operating in revenue service.

Private sector solutions offered by TNCs and others have demonstrated significant cost savings in providing these services. These companies often have financial backing that help subsidize the cost to the user and usually do not pay or train drivers to the same level as public transit operators. In the case of TNC operators, drivers are typically paid per trip and not compensated for their "down time" or travel time to and from trips. In West Sacramento where Via is offering a full turnkey solution including vehicles, drivers, technology, marketing, and customer service for a citywide program. Hourly costs for the service are less than half of Connect's full allocated hourly costs<sup>5</sup>. It should be noted that there are significant differences in labor markets between Marin and Yolo County, but there are potential opportunities to reduce operating costs if the program was scaled to be attractive to providers such as Via.

- Connect has not been adopted as a first/last mile connection to the fixed route bus network, primarily just to the regional rail network. While passengers transferring between local fixed route and Connect are offered a discount of \$2.00 off the regular \$4.00 Connect fare, few are using the connection for this purpose. Transfers are generally recognized as a barrier to using transit and this is more pronounced for short trips rather than longer regional trips. Since the Connect service area has four other local fixed route options (Routes 35, 49, 245, and 257) that serve the area, riders are likely walking longer distances to get a one-seat ride as opposed to using the service as a connecting option. Riders with disabilities that prevent walking the longer distances are likely using the paratransit service and avoiding a transfer which can be especially challenging for these riders.
- Expanded geography of the service could increase ridership. The single largest request from riders and non-riders in survey responses was to expand the service area. The most requested area of expansion was Downtown San Rafael and the San Rafael Transit Center. In developing the parameters for the service, Staff have focused on a program that expands mobility for those in need without

<sup>5</sup> <https://www.cityofwestsacramento.org/home/showdocument?id=8847>

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offering a subsidized service that directly competes with private sector offerings and directly competes with higher capacity fixed route transit service. For example, Route 245 operates completely within the Connect service area with the exception of one stop, the San Rafael Transit Center. Average weekday ridership is 180 passenger trips which is over double the average daily ridership for Connect. Further, this route only operates 12 revenue hours per day, or approximately half as much service as Connect. Thus, productivity is 14 passengers per hour compared to just over three passengers per hour on Connect and subsidy levels are around \$5.50 per trip compared to \$40.00 per trip we are seeing in recent months on Connect. While it could be argued that reducing fixed route service would increase ridership on Connect, overall productivity and cost effectiveness would decline.

To preserve attractive ETAs, expanded geography would also require additional service and added costs. Therefore, if fixed route service was reduced, the added resources needed to backfill coverage using Connect would surpass any net savings.

- The Connect model has potential to complement the District's other programs focused on senior and ADA mobility but changes should be evaluated to better accommodate these riders. Currently only 8% of all passenger trips are taken by riders that either need an accessible vehicle or are registered for one of the other Marin Access services. While some of these riders have access to a smartphone and find the experience seamless to use, those without a smartphone lack the additional communication supporting the ride requests. Additional support for the call center should be considered if the pilot program continues to enhance the experience for these riders. As previously noted, the expanded geography is also an important element to encouraging more senior and ADA trips on this program.

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## VI. Conclusions, Considerations, and Next Steps

The Connect program has shown a steady growth in ridership and productivity and a steady decline in per trip subsidies. However, it is estimated that this type of on-demand service, with an extremely high level of rider convenience, will never outperform traditional fixed route service.

As transportation services are currently in a period of rapid advancements, especially related to technology, the District should consider some near-term changes that may impact the Connect program.

1. Marin Transit's initial agreement with Via allows the District the use the technology free of charge. Future commitments should expect operating costs to increase as technology fees are included.
2. SMART is currently under construction with its extension to Larkspur and build out of a third train station in Novato. Along with these additional Marin stations, it is anticipated that SMART will make schedule adjustments and potentially increase service frequency. If 30-minute morning southbound service frequencies are introduced, ridership would likely be spread out and service levels on Connect could decrease, while still meeting peak ridership demand. A drop in service hours, coupled with steady or increases in ridership, would help increase performance.
3. The State of California recently passed SB 1376, Hill, which calls for all TNCs to provide accessible options or pay into a fund to support increases in on-demand accessible services. While it is still very unclear how this law will be enforced and where eligible funds will go, it appears the State is supporting the local goals or increasing on-demand options in for those who need accessible vehicles.

Any future recommendations will need to recognize that the primary users of the service today are first/last mile commuters. As options are considered for the Connect program moving forward, the needs of this market must be balanced with the intended goals of the program, increasing on-demand, accessible service for those in need.

Potential recommendations for the future of the Connect program should include:

- **Evaluating consolidation of Connect and Catch-A-Ride services.** The primary objective of the Connect service was to fill the void of on-demand, accessible services in Marin County. However, the small geographic area has likely limited the quantity of demand for this service. Catch-A-Ride is the most similar offering by the District to Connect but it currently lacks the technology provided by Via. Consolidating these programs would have to address the expanded geographic coverage offered by Catch-A-Ride and likely have to limit general public service currently provided by Connect.

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- **Adjusting to fixed route services to target high demand origin/destination patterns.** Based on an initial assessment, timed adjustments to routes in the area to the train station and major employment zones could be explored.
- **Examining the potential to increase fares and employer contributions to financially support the program and reduce the per public trip subsidy.** Revisiting fare pricing and policies could be explored to achieve increased financial stability. Additional contributions from employers could be another option to increasing revenues.
- **Exploring a new service delivery (operations & maintenance) option for the on-demand service.** The program's operations can function with a much lower level of scheduling, dispatch and customer service support than traditional demand response services. The required vehicle maintenance and driver training is also less compared to other transit services. The largest challenge with pursuing a contract tailored to this service, similar to current contracts, is the ability to find a suitable facility to store and maintain the vehicles. The relatively small program could be attractive to potential contractors because it requires minimal parking; however, it will also make it unattractive to those looking to get economies of scale and mobilizing in Marin County.
- **Evaluating a closer partnership with TAM's LYFT program.** This voucher program provides a way to leverage Lyft's technology (driver and rider apps) and utilize its network of drivers to provide on-demand services. The program has demonstrated a much lower subsidy per trip average but lacks the reporting and data offered by the Via platform. A potential partnership could leverage Lyft's technology and have agency-operated accessible vehicles support the ADA elements of the service. This partnership could allow geographic coverage expansion to occur without additional investments in service hours.

Staff will be working in the coming month with its project partners and others identified above to explore recommended next steps for the pilot program. It is anticipated that a formal recommendation will be presented as part of the District's Short Range Transit Planning exercise and include financial projections to support any ongoing needs of the program.



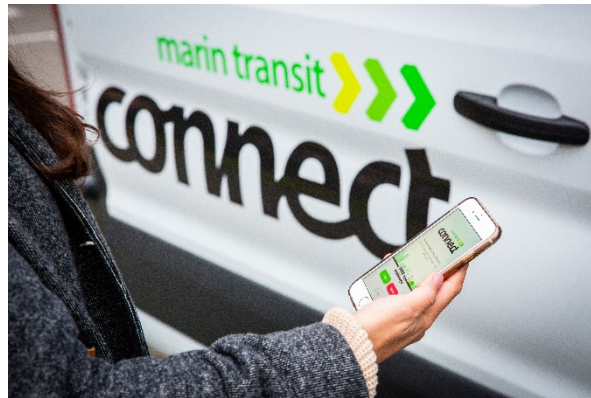
# **Marin Transit Connect Evaluation**

**Marin Transit Board of Directors**

**July 1, 2019**

# What is Connect?

- On demand, shared-ride, accessible general public transit service
- Trips requested through an App or by calling Scheduling Line
- Curb-to-curb service within the Service Area (Northern San Rafael)
- Agency-owned vehicles operated under contract with paratransit service provider (Whistlestop)



## ■ Goals:

- Provide increased/new same-day option for riders with disabilities
- Increase first and last mile connectivity to existing fixed route transit
- Help commuter traveling to jobs in Marin County reach their final destinations

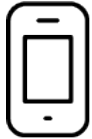
## ■ Pilot Program Questions:

- Can a new program effectively serve multiple markets?
- How will riders respond to new technologies (app-based reservation service)?





**Service Hours:** weekdays (6:20 am — 7:00 pm)



**Ride Request:** made using app or calling scheduling line



**Fares:** \$4.00 seat/\$2.00 seat (transit stop/senior/ADA) / \$40 month pass



**Service Area:** Northern San Rafael



**Vehicles:** 9 passenger accessible vans

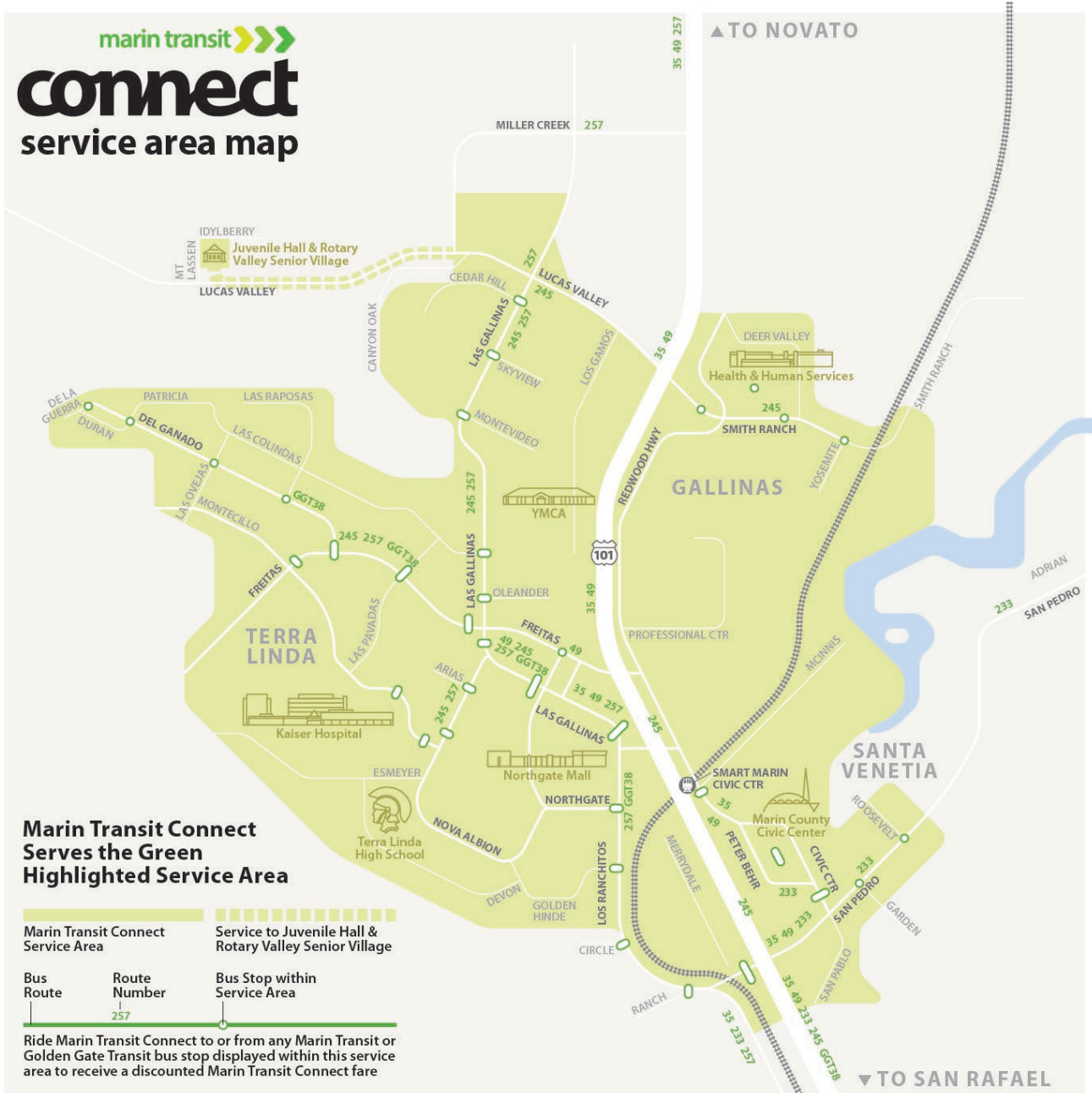


# Service Area



marin transit

## connect service area map



**Marin Transit Connect Serves the Green Highlighted Service Area**

Marin Transit Connect Service Area	Service to Juvenile Hall & Rotary Valley Senior Village
Bus Route	Bus Stop within Service Area
Route Number	
257	

Ride Marin Transit Connect to or from any Marin Transit or Golden Gate Transit bus stop displayed within this service area to receive a discounted Marin Transit Connect fare

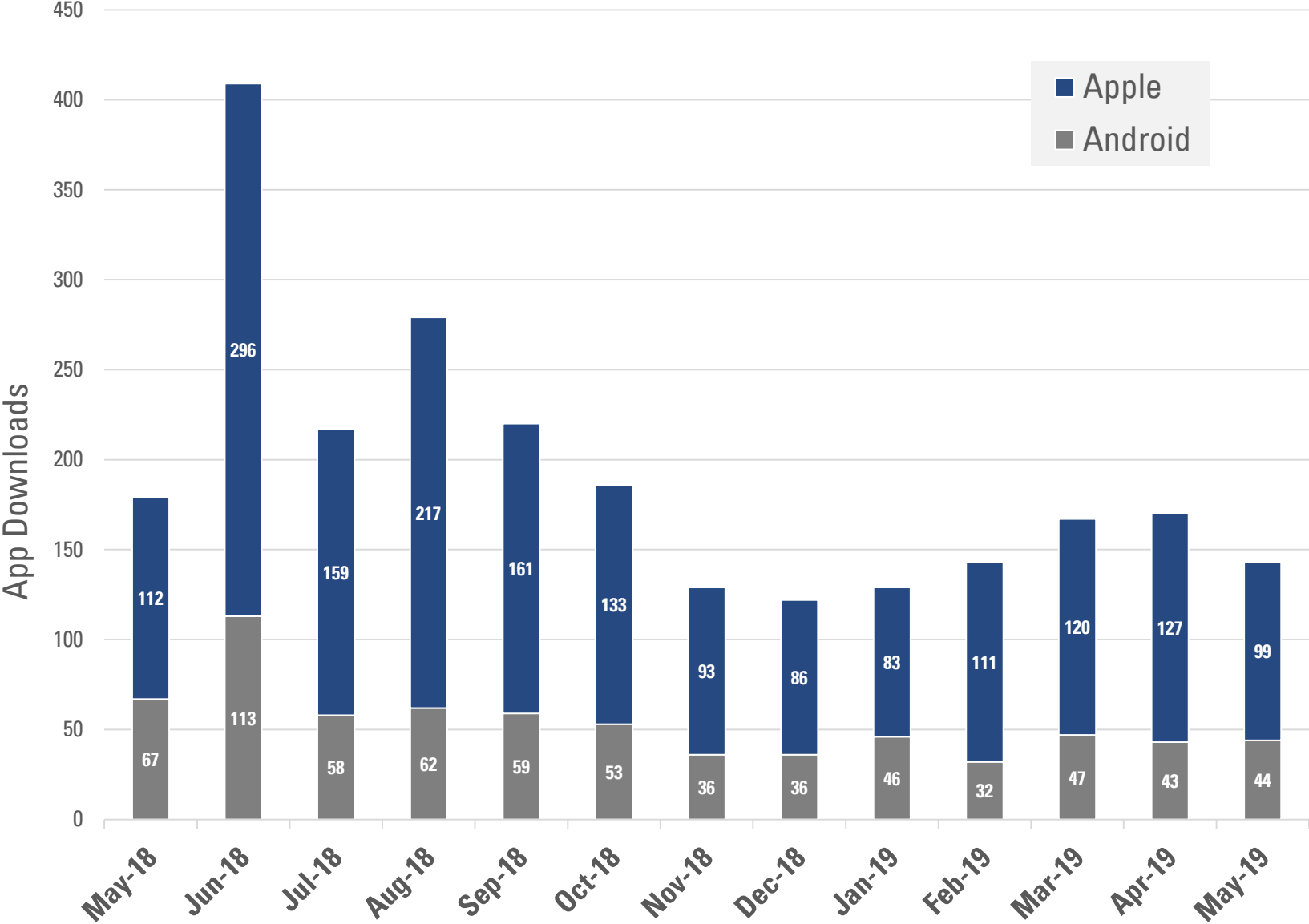
# Service Performance Trends



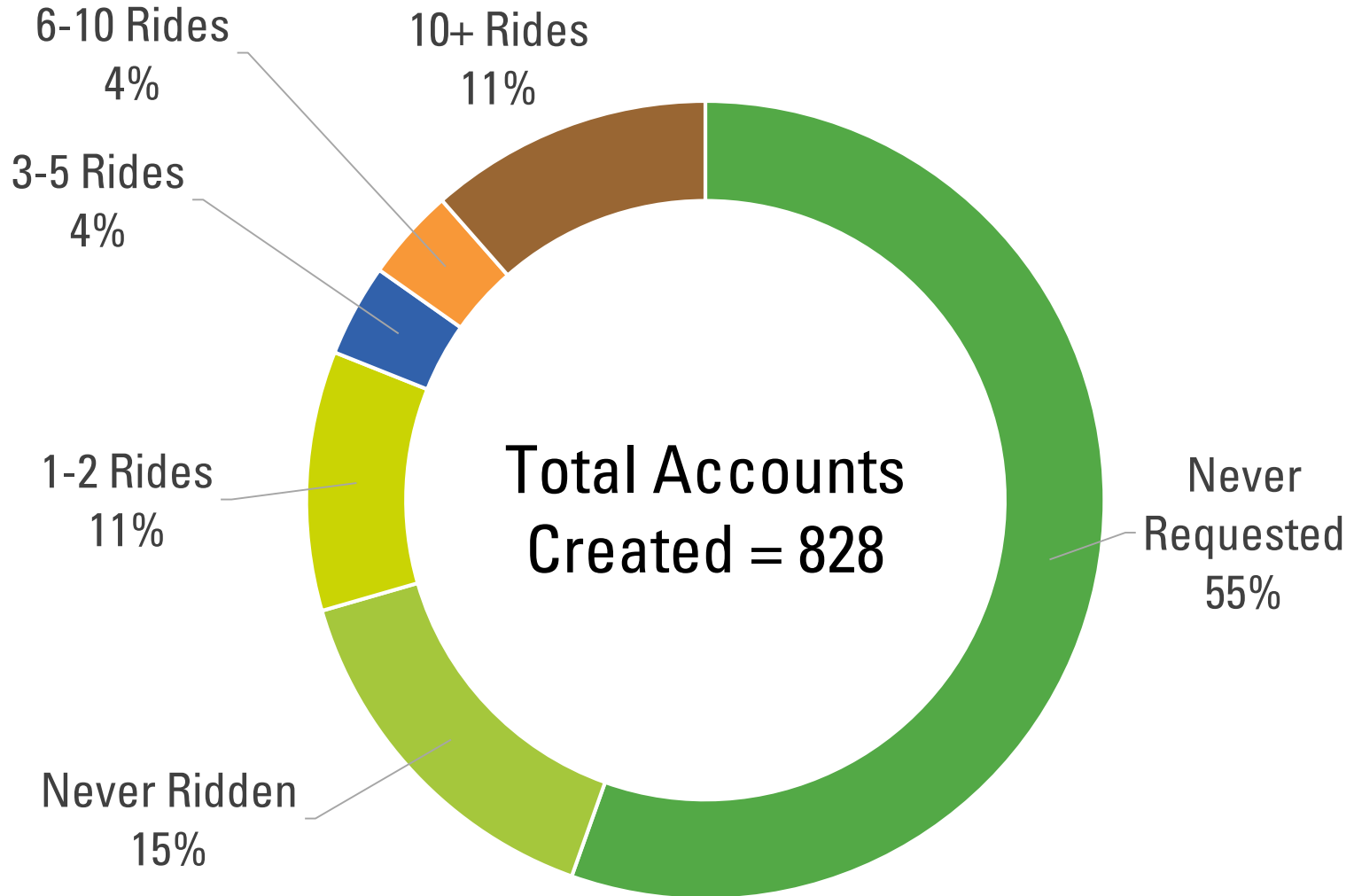
		FY 2019/20				
		Q1	Q2	Q3	Q4 <sup>(1)</sup>	Total
Avg Wait Time for Pickup (min)		7.15	7.56	7.58	8.31	<b>7.73</b>
% On Time Arrival for Pickup	Within +/- 3 min.	84%	79%	84%	80%	<b>82%</b>
	Within +/- 5 min.	94%	93%	94%	93%	<b>93%</b>
Average Trip Length (Time, min)		7.61	7.50	7.53	7.45	<b>7.51</b>
Average Trip Length (Distance, mi.)		1.2	1.1	1.1	1.1	<b>1.1</b>

1. Q4 includes April and May actuals and estimates for June 2019

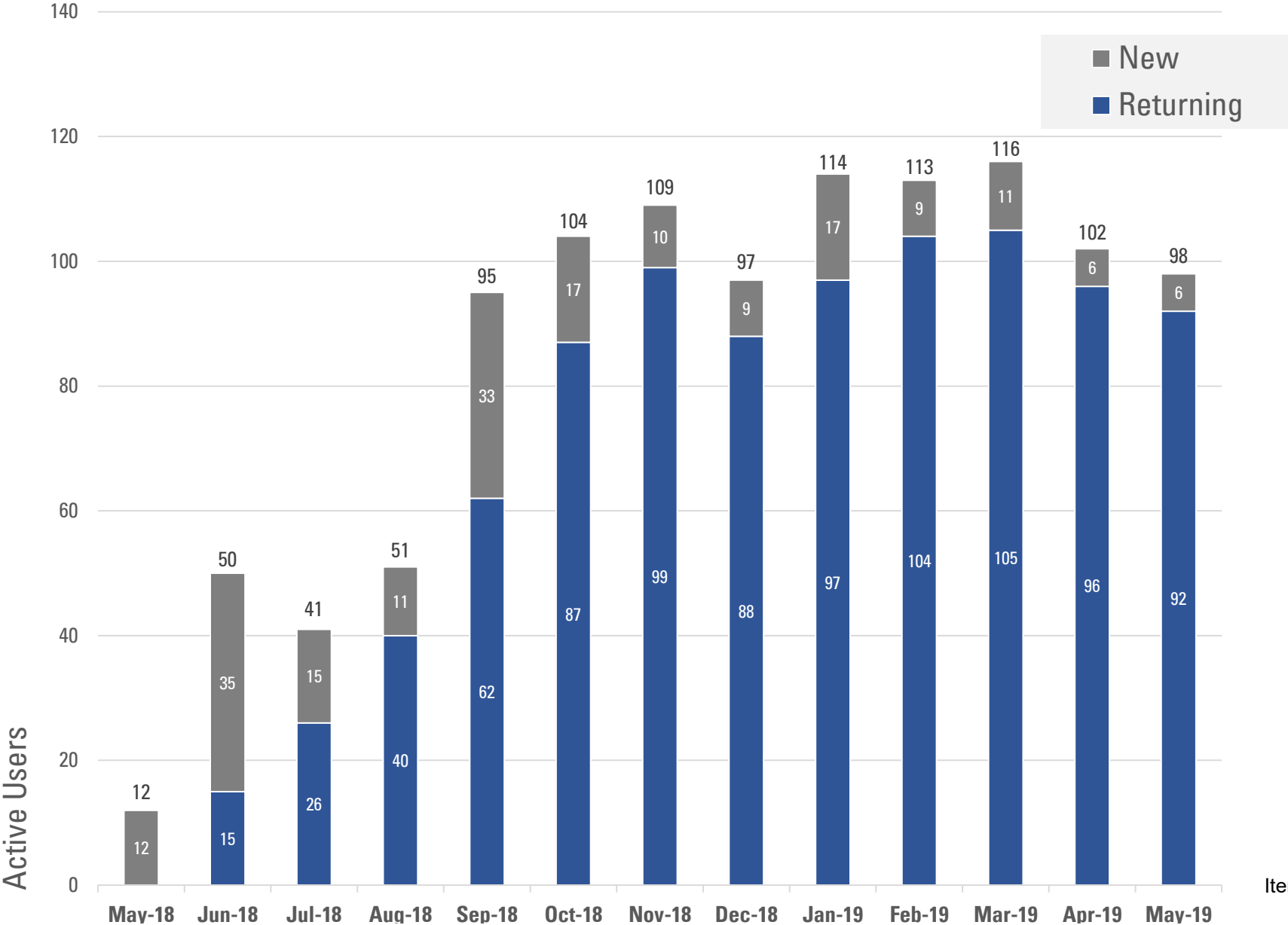
# App Downloads



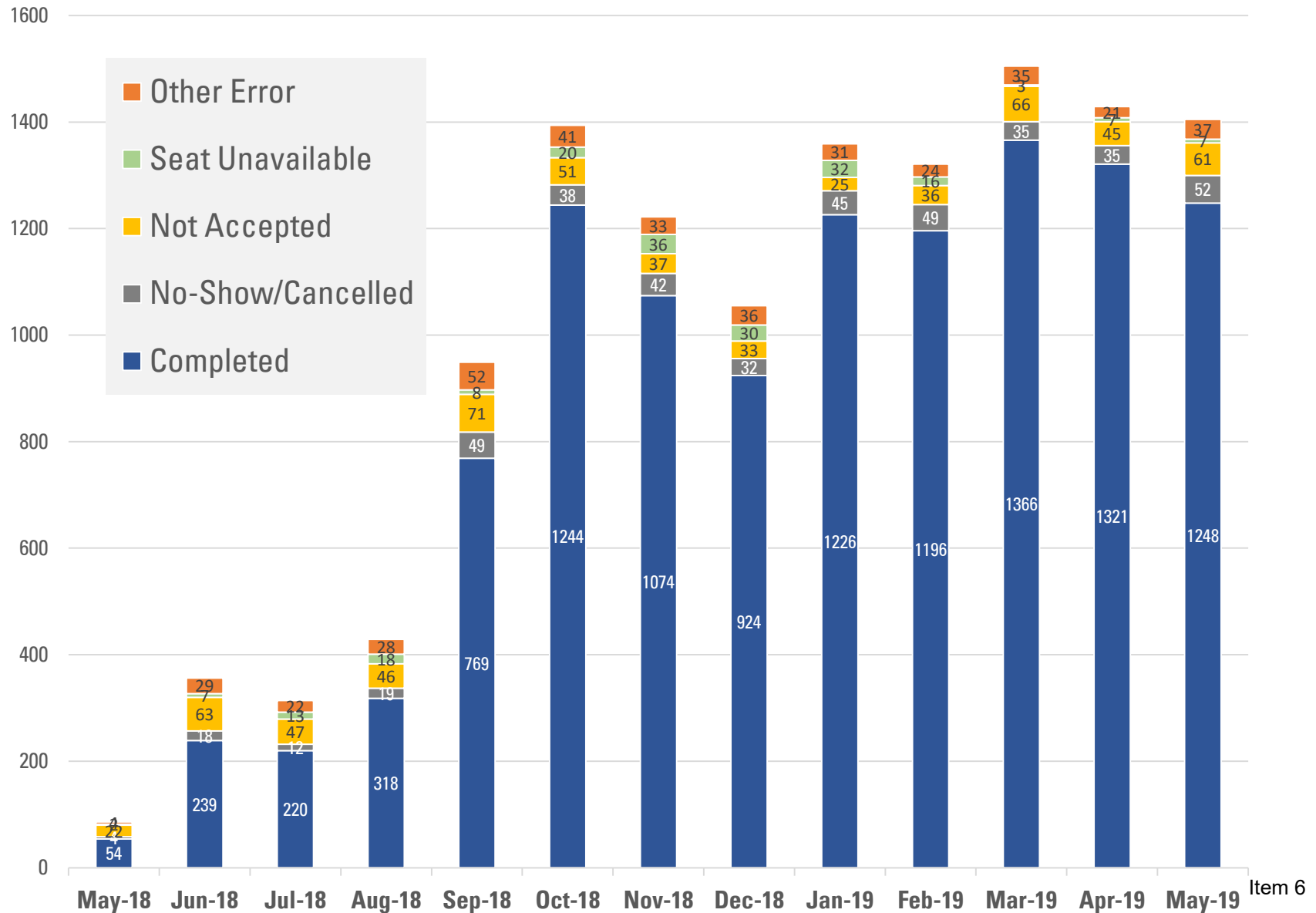
# Ride Activity



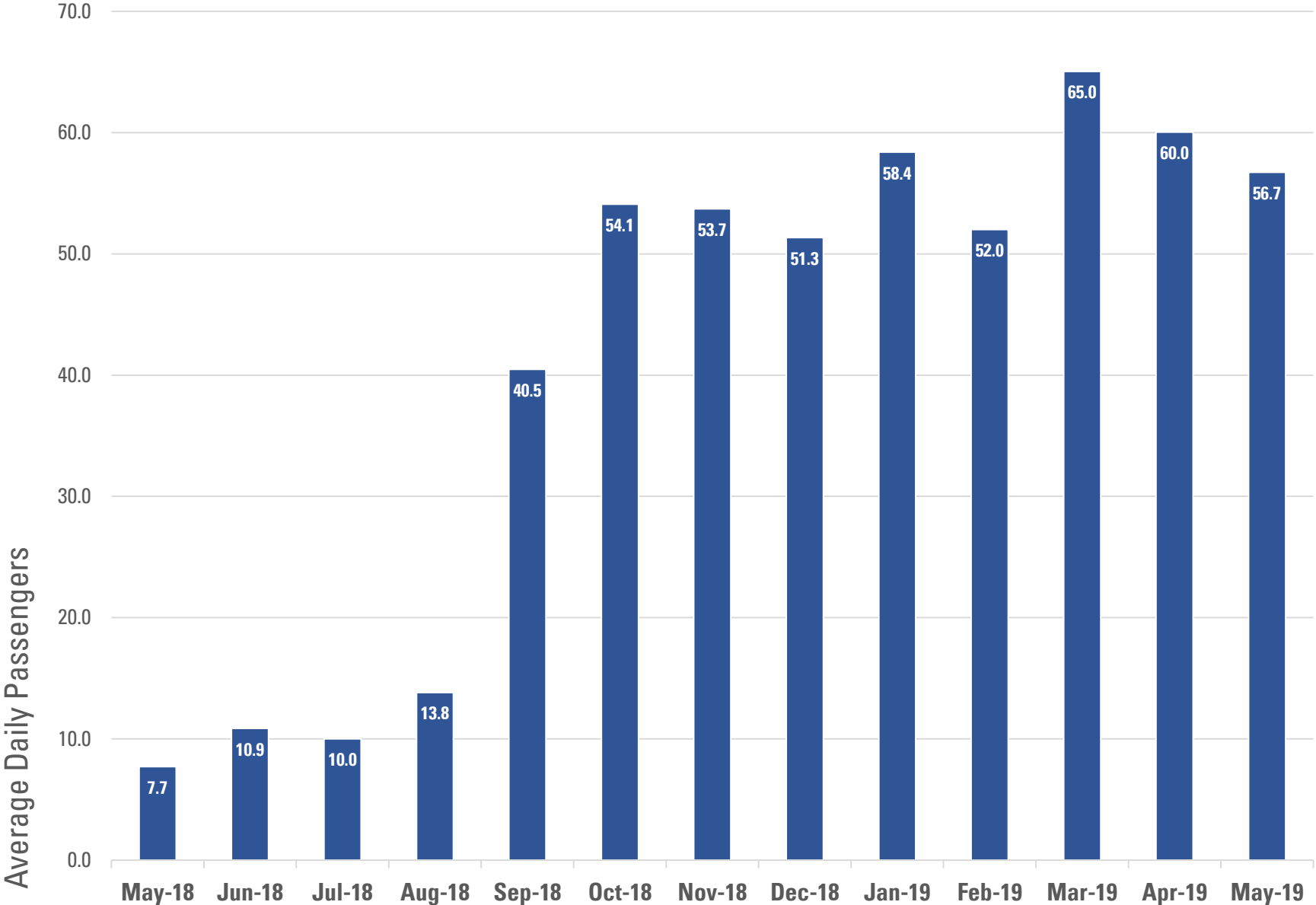
# Active Users



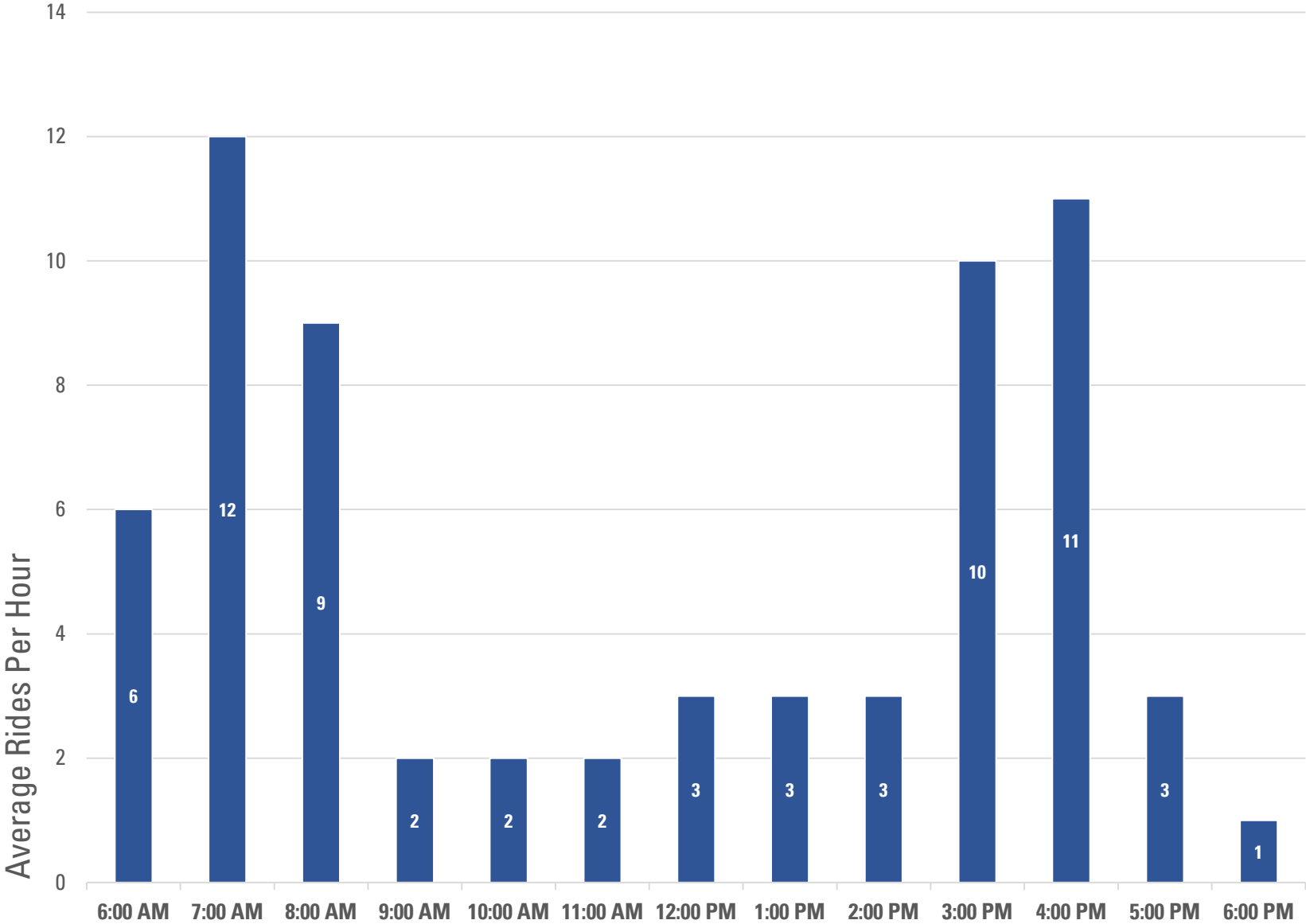
# Ride Summary



# Average Daily Passengers



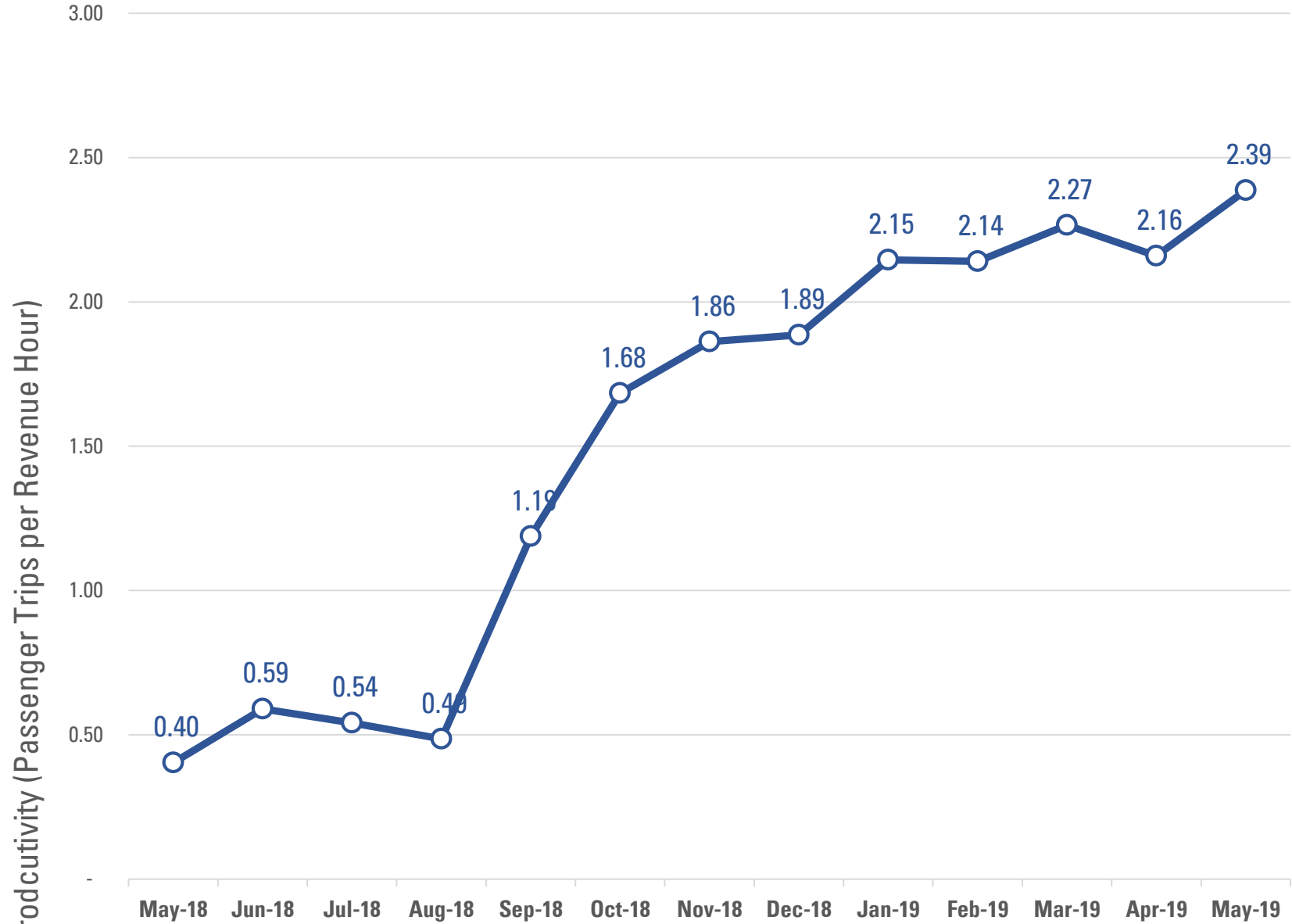
# Average Rides By Hour of Day



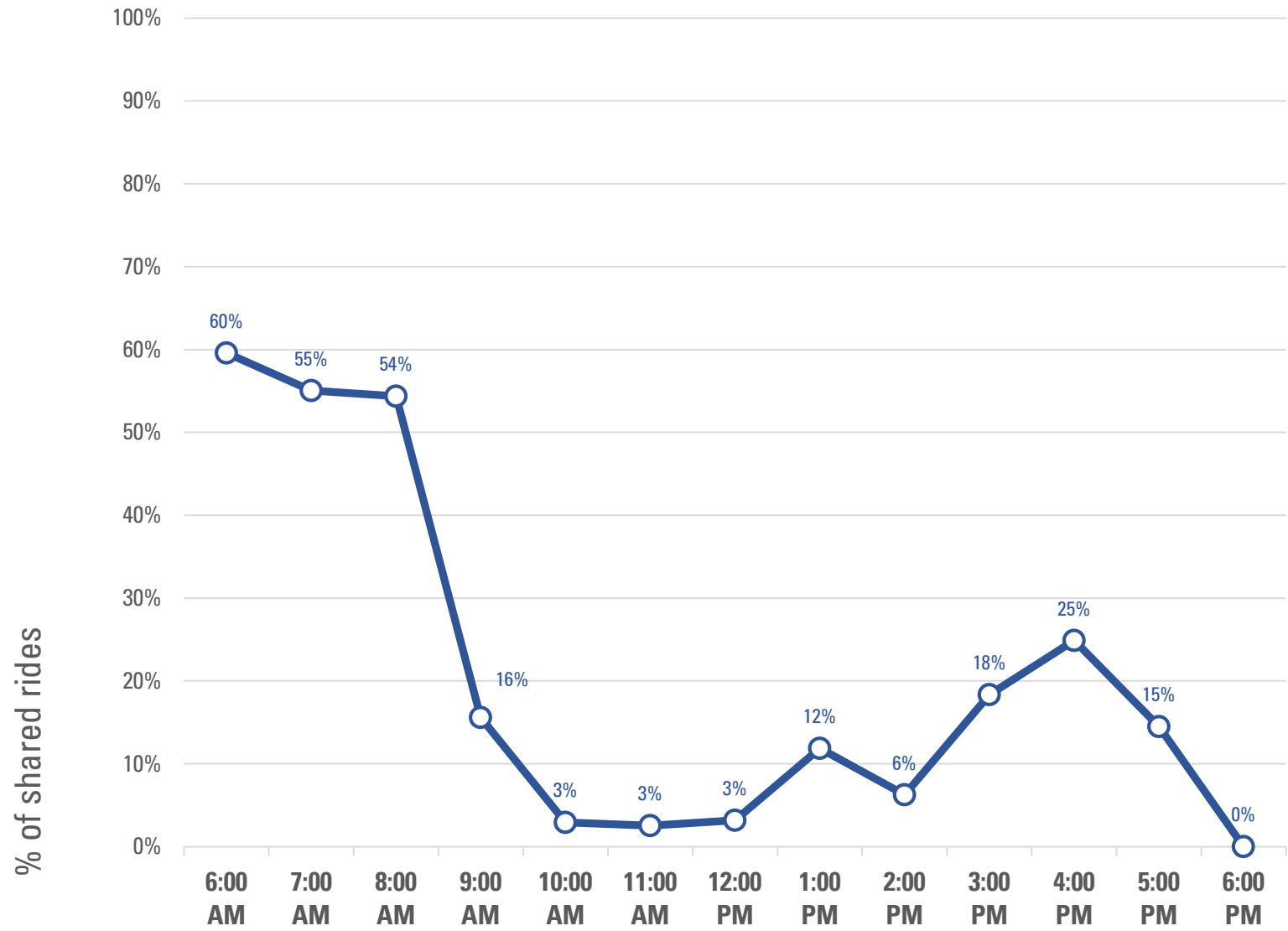
Includes data through May 2019



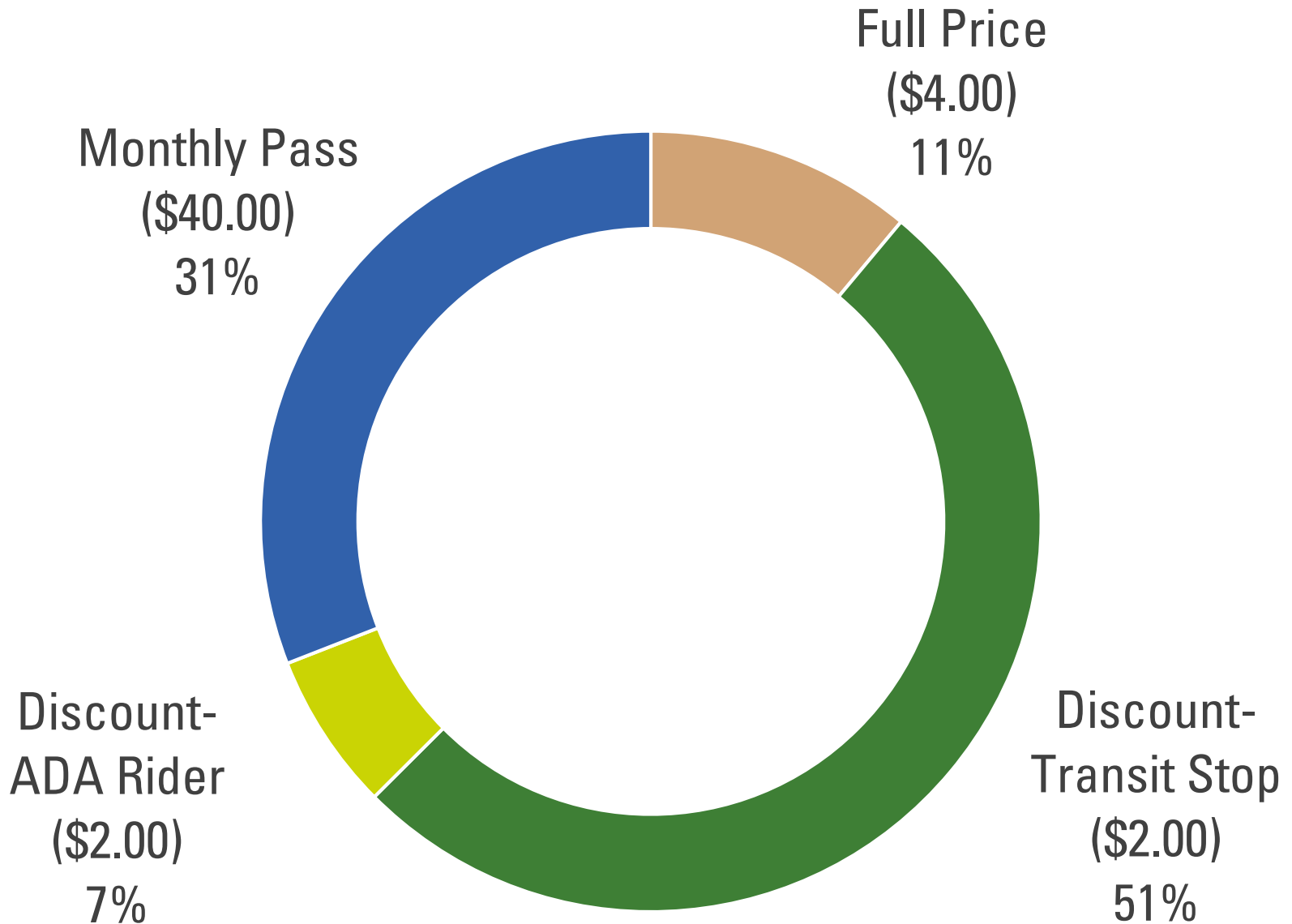
# Productivity Chart



# Ridesharing Percentages By Time of Day

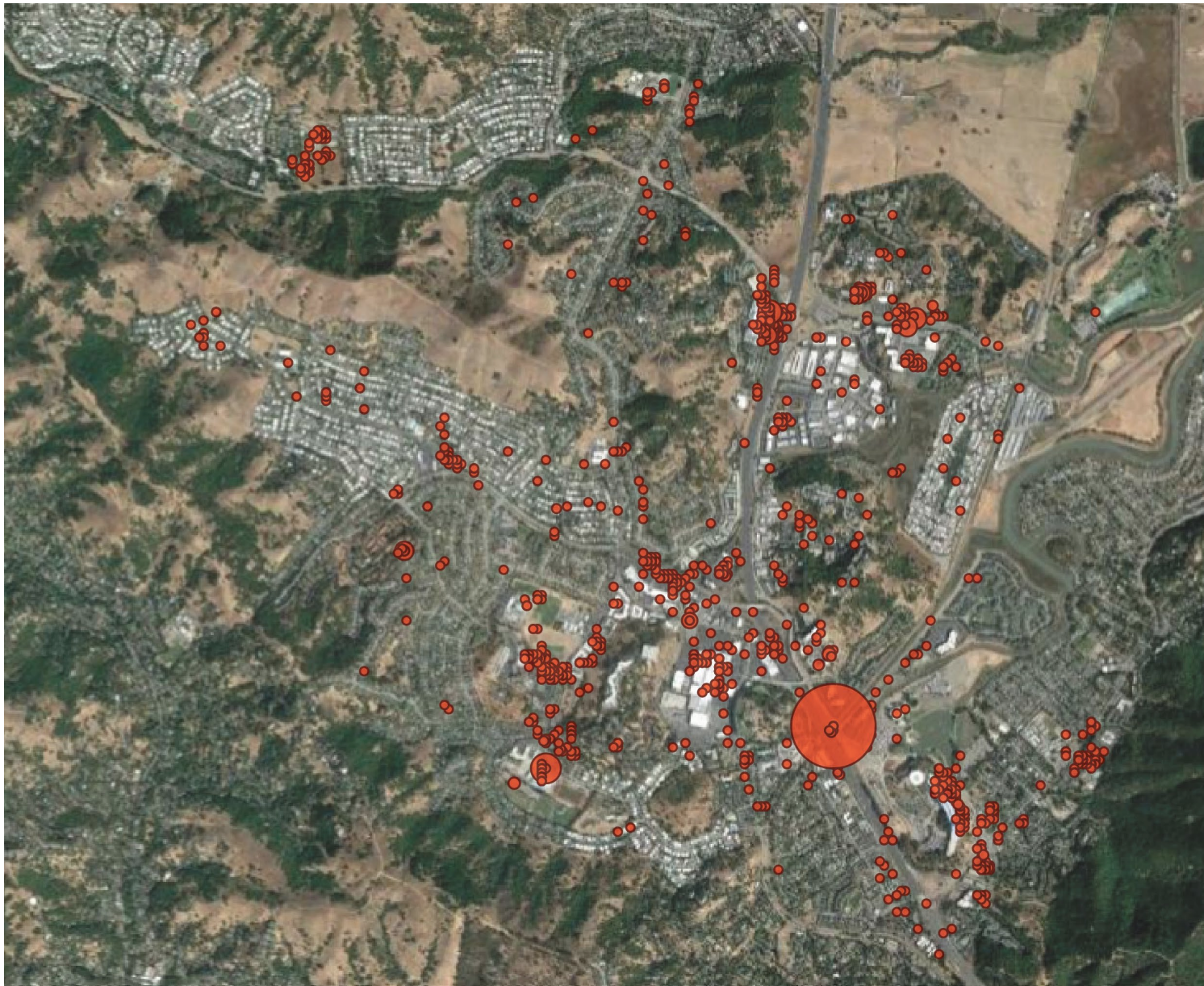


# Type of Fare Paid



Includes data through May 2019

# Trip Origins



Includes trip data from January 2019 - May 2019

## Market

## Objectives

Senior/ADA Riders

- Better understand same day paratransit opportunities and service delivery model
- Improve transit options for conditionally eligible paratransit riders

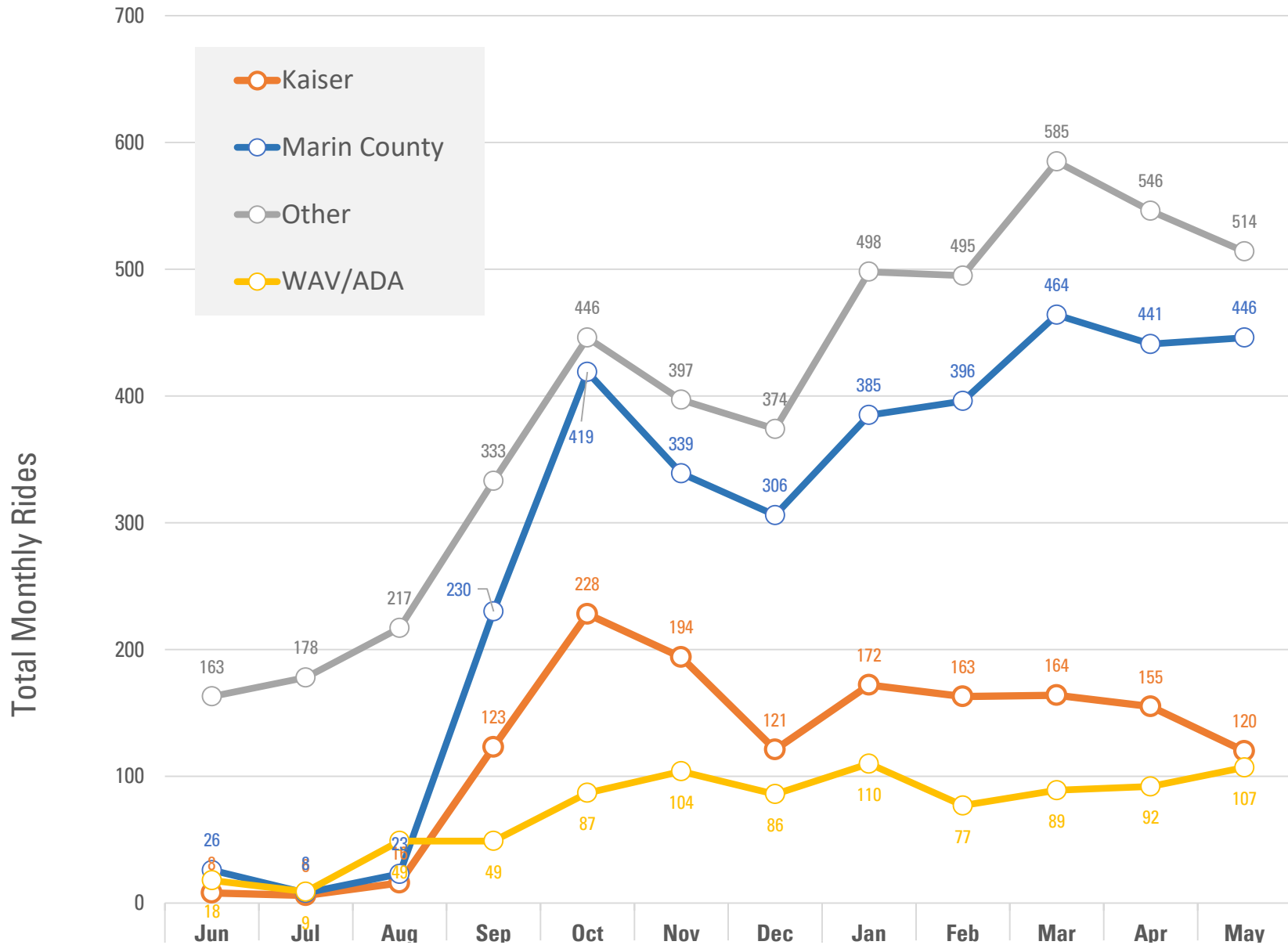
Commuters traveling from outside of Marin

- Reduce number of drive alone commuters

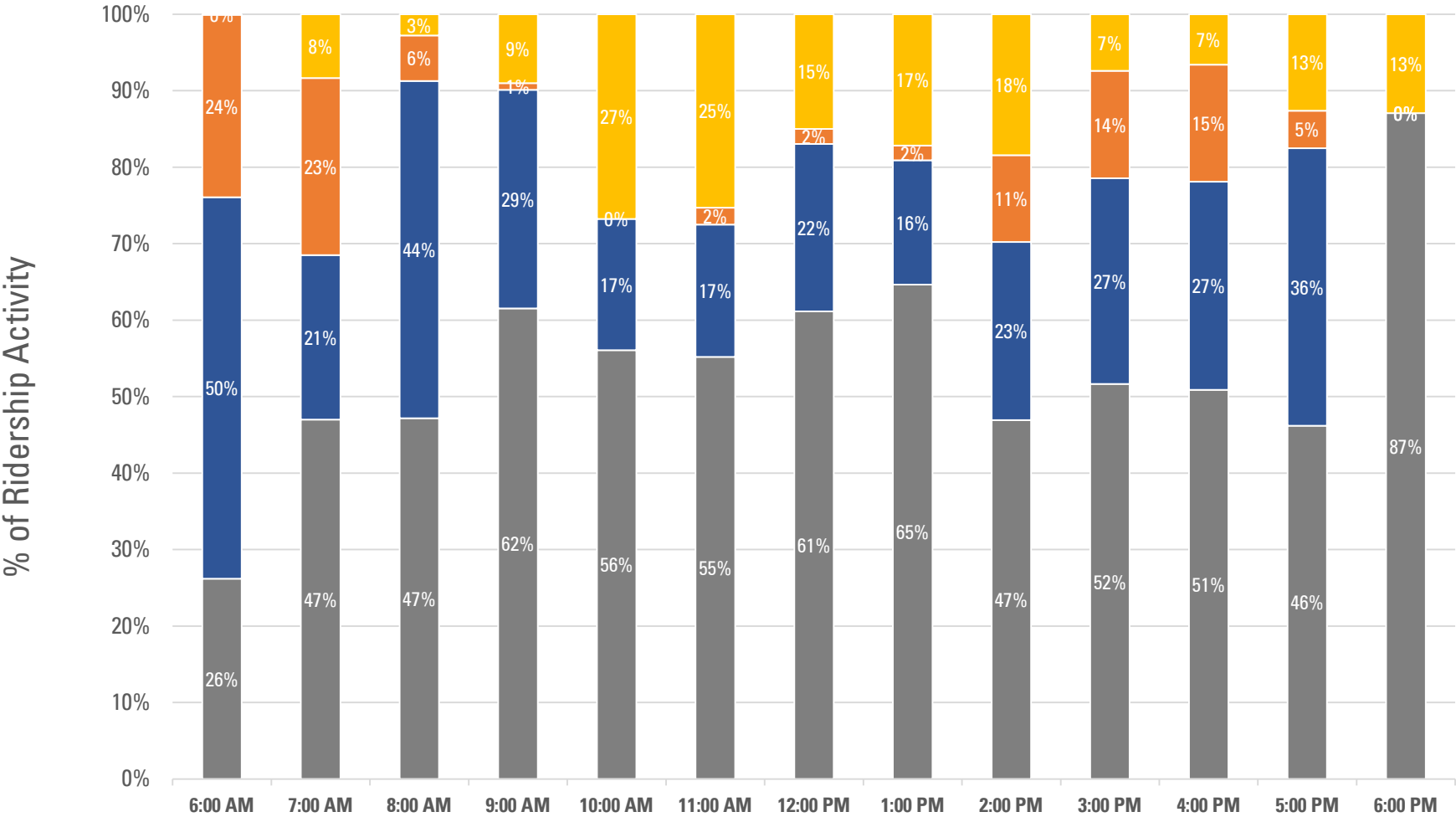
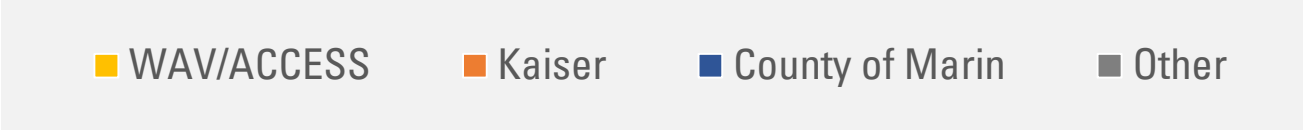
Northern San Rafael residents and commuters

- Improve first and last mile connectivity between Northern San Rafael residential neighborhoods and transit corridors
- Test delivery method for more effective/productive neighborhood shuttle

# Ridership Trends, by Market



# Market Demand By Time of Day



# Performance by Market



Connect Market	Passengers	Driver Hours	Subsidy per passenger trip	Productivity
Senior/ADA Trips	8%	11%	\$54.13 per passenger trip	1.62 pax/hr
Employer Sponsored: <b>Kaiser</b>	13%	10%	\$27.59 per passenger trip	2.88 pax/hr
Employer Sponsored: <b>County of Marin</b>	35%	32%	\$33.03 per passenger trip	2.44 pax/hr
Regular/Other	44%	47%	\$42.46 per passenger trip	2.06 pax/hr
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>\$39.48</b> per passenger trip	<b>2.22 pax/hr</b>

Data shown for January – May 2019 (software stabilization period)



# Performance Targets: Cost Effectiveness



Connect Market	District Typology Match	District Cost Effectiveness Goal (maximum)	FY 2017/18 Performance
Senior/ADA Trips	Demand Response	<b>\$35.00</b> per passenger trip	<b>\$40.05</b> per passenger trip
Employer Sponsored	Partnership	None identified	<b>\$5.89</b> per passenger trip
Regular/Other	Local Connector	<b>\$9.00</b> per passenger trip	<b>\$9.96</b> per passenger trip
<b>CONNECT Program</b>		<b>\$15.00</b> per passenger trip (suggested)	<b>\$39.48</b> per passenger trip (actual)

# Performance Targets: Productivity



Connect Market	District Typology Match	District Productivity Target (minimum)	FY 2017/18 Performance
Senior/ADA Trips	Demand Response	2.0 pax/rev hour	2.1 pax/rev hour
Employer Sponsored	Partnership	None identified	11.4 pax/rev hour
Regular/Other	Local Connector	8.0 pax/rev hour	9.1 pax/rev hour
<b>CONNECT Program</b>		<b>4.0 pax/rev hour</b>	<b>2.2 pax/rev hour</b>

- **Rider Profile**
  - Primarily SMART, first/last mile commuter
  - Higher income, greater access to private autos than local transit rider
- **Community Benefits**
  - Supporting local employers
  - Accessible service for residents and day programs in service area
  - Mobility option for remote senior housing facilities, not accessible to fixed route services



- **Role in the Transit Network**
  - Highly personalized transportation service
  - Lower productivity, higher subsidy than traditional fixed route
  - Agency operated service is costly due to driver requirements and compensation structure
  - Transfers to regional transit network much stronger than local transit network
  - Geographic expansion should be considered to increase ridership. Added costs will need to be addressed
  - Additional support for senior/ADA markets needed to make Connect reliable option

- **Future financial projections need to consider added costs of technology**
- **SMART expansion has the potential to increase ridership and spread out demand. This change could increase productivity and cost effectiveness of Connect.**
- **State of California recently passed SB 1376 (Hill) requiring TNCs to provide accessible vehicles or pay into an account to support on-demand accessible providers.**

The following should be evaluated prior to a formal recommendation for the future of the pilot:

- Examine the potential to increase fares and employer contributions to current program
- Explore new service delivery (operations & maintenance) options for on-demand service
- Consider consolidation of Catch-A-Ride and Connect
- Assess adjustments to the fixed route network
- Evaluate a closer partnership with TAM's Lyft program

# Thank You

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**Robert Betts**

**Director of Planning and Operations, Marin Transit**

**[rbetts@marintransit.org](mailto:rbetts@marintransit.org)**



711 grand ave, #110  
san rafael, ca 94901

ph: 415.226.0855  
fax: 415.226.0856  
[marintransit.org](http://marintransit.org)

July 1, 2019

Honorable Board of Directors  
Marin County Transit District  
3501 Civic Center Drive  
San Rafael, CA 94903

**SUBJECT: Overview of Marin Transit Fares and Fare Policies**

**board of directors**

Dear Board Members:

damon connolly  
president  
supervisor district 1

**RECOMMENDATION:** Information item only.

dennis rodoni  
vice president  
supervisor district 4

**SUMMARY:** Staff recently conducted a rider survey and detailed data analysis to support a recommended fare change proposal. In advance of presenting a formal proposal, staff is providing your Board with an overview of current fares and fare policies. The attached presentation is a comprehensive review of District fares and fare policies. The presentation also provides information on fare collection equipment and Marin Transit's relationship to Golden Gate Transit and the regional Clipper program. It concludes with a summary of peer agencies fares and fare policies and regional efforts to be considered in advance of adopting fare changes.

kate colin  
2nd vice president  
city of san rafael

**BACKGROUND:** Marin Transit evaluated changes to its fares and fare policies since the development of its 2018 Short Range Transit Plan. Appendix B of the 2018 Plan provides guidance on a potential fare change to meet District goals. Staff have been carefully weighing these recommendations to ensure they do not conflict with regional goals and continue to support ease of transfer with our partner transit agencies. This approach is influenced by the changing landscape of the Clipper program and the integration of local and regional fares with Golden Gate Transit. Staff also conducted a survey of riders in November and December 2018 to inform these efforts and better understand why riders use certain payment methods and identify possible incentives to achieve goals of the fare proposal.

judy arnold  
director  
supervisor district 5

stephanie moulton-peters  
director  
city of mill valley

katie rice  
director  
supervisor district 2

kathrin sears  
director  
supervisor district 3

As part of the 2020 Short Range Transit Plan, staff plan to present your Board with a recommended fare change proposal later this fall. Staff will update this proposal based on comments from your Board, conduct outreach to riders who may be impacted by this proposal, and prepare a Title VI Fare Equity Analysis for your review.

eric lucan  
alternate  
city of novato



**FISCAL/STAFFING IMPACT:** There is no fiscal impact associated with this item.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'R. Betts', written in a cursive style.

Robert Betts  
Director of Operations and Planning

Attachments: Marin Transit Fares Overview Presentation



# Marin Transit Fare Overview

Marin Transit Board of Directors

July 1, 2019

- **Current Fare Structure & Policies**
  - Fare Media
- **Fare Collection Methods & Equipment**
- **Rider Fare Usage and Survey Results**
- **Financial Performance Measures**
- **Peer Agency Fares**
- **Regional Case Studies and Proposals**
- **Goals of 2018 SRTP Fare Recommendations**
- **Next Steps Toward Formal Fare Change Recommendations**



# Current Fare Structure



Category	Cash Price	Clipper	1-Day Pass	7-Day Pass	31-Day Pass
Adult	\$2.00	\$1.80	\$5.00	\$20.00	\$80.00
Youth (5-18)	\$1.00	\$1.00	\$2.50	\$10.00	\$40.00
Children Under 5	Free when accompanied by an adult				
Seniors (65+)	\$1.00	\$1.00	\$2.50	\$10.00	\$25.00
Persons with Disabilities	\$1.00	\$1.00	\$2.50	\$10.00	\$25.00
Connect <sup>(1)</sup>	\$4.00	-	-	-	\$40.00
Muir Woods Shuttle	\$3.00 <sup>(2)</sup>				

1. Marin Access clients and rides to or from a transit stop get a 50% discount on Connect fares. Per rider charges also decrease with increased ride shares (triggered at 3 or more passengers)
2. Roundtrip fare. NPS reimburses Marin Transit an additional \$2.00 or \$5.00 per roundtrip fare.

# Current Fare Structure (con't)

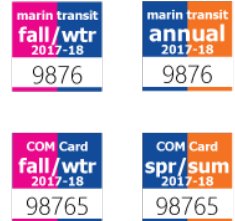


Category	Cash Price
Paratransit (ADA Mandated Service <sup>(1)</sup> )	\$2.00
Paratransit Extend Area (ADA Non-Mandated Service <sup>(2)</sup> )	\$2.50
Dial-A-Ride <sup>(3)</sup>	\$1.00 - \$2.50

1. ADA regulations permit fares for Mandated ADA trips to be as high as double the fixed route fare.
2. ADA regulations did not set a maximum fare for Non-Mandated ADA trips.
3. Novato is \$1.00 for youth/senior/ADA and \$2.00 adults; Dillon Beach/Tomales and Point Reyes Dial-A-Ride services are \$2.50 for all riders.

## ■ Marin County Youth Pass Program

- K-12 pass offered countywide for \$325 per year. Students on free and reduced lunch program eligible for free pass



## ■ College of Marin Class Pass

- Students pay a small per credit fee for unlimited access to local network while a registered student



## ■ Homeward Bound Tickets and Bulk Discount Programs

- Free single ride tickets are distributed by Homeward Bound based on need of transportation services
- Social service agencies that purchase in bulk receive discounts



## Fixed Route

- Transfers are good for 2 hours on local routes
- Free transfers with Golden Gate Regional Bus and Ferry
- \$1.50 adult/\$0.75 youth and senior transfer credit to SMART
- Cash riders that overpay receive a change card for use on future travel

## Marin Access

- Eligible riders that demonstrate that they receive Supplemental Security Income (SSI) are eligible for the Low-Income Fare Assistance Program that entitles them to 20 free local paratransit rides per quarter

# Where to Buy Fare Media (Fixed Route)



- **Day Passes:** Onboard vehicles (issued through farebox)
- **Week and Month Passes:**
  - Online: [www.marintransit.org](http://www.marintransit.org)
  - Phone: 511
  - In Person: San Rafael Transit Center Customer Service (890 Tamalpais Ave, San Rafael)
- **Clipper:**
  - Online: [www.clippercard.com](http://www.clippercard.com)
  - In Person (adult cards only): Whole Foods, Walgreens, San Rafael Transit Center, Larkspur/Sausalito Ferry Terminals, SMART stations and other select locations





- Partial Implementation with Golden Gate Transit in 2006
- Full Implementation in 2013
- Still embedded within Golden Gate Transit structure
  - Cannot independently change Clipper fares
  - Only agency in Bay Area that does not have passes in Clipper
  - Required tag-on/tag-off, even with flat fare structure
- Clipper is used by 11% of total of total riders. This % is relatively unchanged over the last five years
- Requested “independence” in 2016 with the Clipper team
  - Staff did not pursue due to cost and Clipper 2.0 status



# Fare Integration with Golden Gate Transit



- Passengers can use transfers across agencies within Marin County
- Clipper system automatically calculates fares across agencies
- Marin Transit allows riders within Marin County to use period passes on Golden Gate Regional routes
  - Marin Transit reimburses Golden Gate on a per trip basis when passes are used
- Riders can use farebox change cards across agencies
- Golden Gate Transit does not accept Youth Pass, COM passes, or Homeward Bound on any regional routes in Marin County



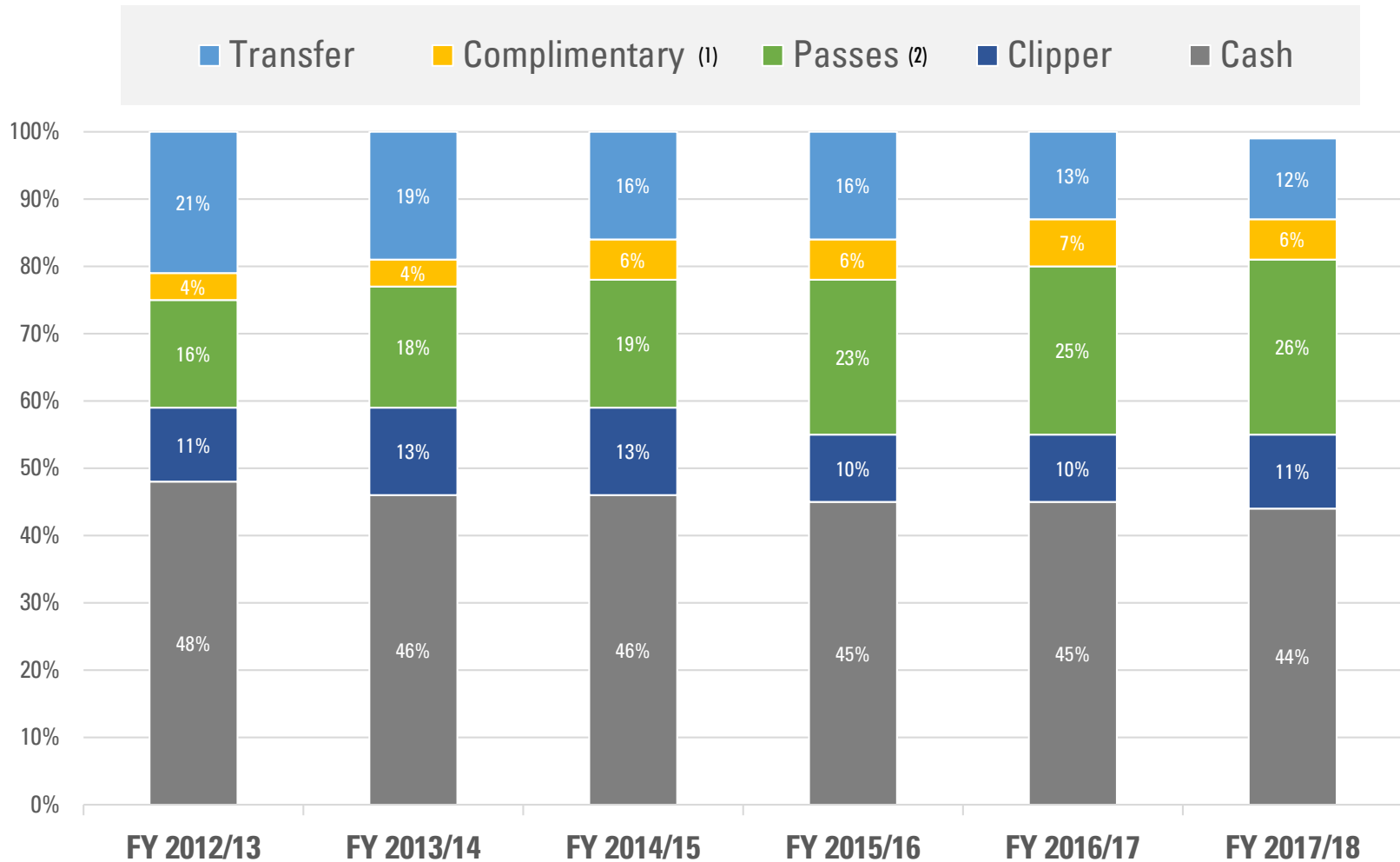
- Base Adult Fixed Route Fares (**\$2.00**) have not changed since 2004
  - \$1.90 to \$2.00
- Paratransit Fares (**\$2.00**) have not changed since 2004
  - \$1.40 to \$2.00
- Reduced Youth Fares (**\$1.00**) were introduced in 2005
  - \$2.00 to \$1.00 (previously same as adult fare)
- Youth Pass program was approved in 2006/07 school year as a result of the Ride N'Roll Pilot Program
- Homeward Bound pass program was introduced in 1999 and formally approved in 2006

# Brief History of Marin Transit Fares (con't)



- Invested with GGT in validating fareboxes in 2008
- Introduced period passes and stored value cards in 2009
- Partial implementation on Clipper in 2006 (with GGT), full implementation in 2013
- Set price for yellow school bus service in 2015, and built website to sell passes
- Online store selling passes launched with new website in 2017
- Mobile payment account offered with Connect service in 2018

# Fare Usage by Fare Type



1. Children ages 4 and under, employees, ferry transfers, Homeward Bound passes, and other free tickets
2. The Month Pass, Week Pass, and Day Pass, all available for Adult, Youth, and Senior rates, and the Youth Pass and College of Marin pass

# Pass Usage

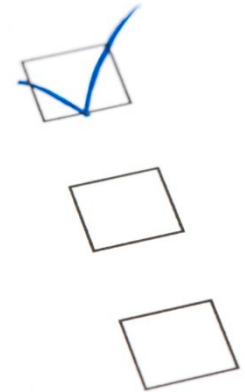


		FY 2017/18 Annual Usage
<b>Adult Media</b>		
College of Marin Pass	students pay per credit fee	159,741
Month Pass	<b>\$80.00</b>	31,299
Week Pass	<b>\$20.00</b>	28,035
Day Pass	<b>\$5.00</b>	4,592
<b>Senior (age 65+) / Disabled Media</b>		
Month Pass	<b>\$25.00</b>	136,616
Week Pass	<b>\$10.00</b>	3,679
Day Pass	<b>\$2.50</b>	45,724
<b>Youth (6-18 yrs.) Media</b>		
School Pass*	<b>\$175-6 mo. / \$325-year</b>	402,296
Month Pass	<b>\$40.00</b>	1,207
Week Pass	<b>\$10.00</b>	231
Day Pass	<b>\$2.50</b>	185

\* School passes are distributed for free to student who qualify for the free or reduced lunch program. 99% of school passes are distributed for free.

## Goals of the Survey

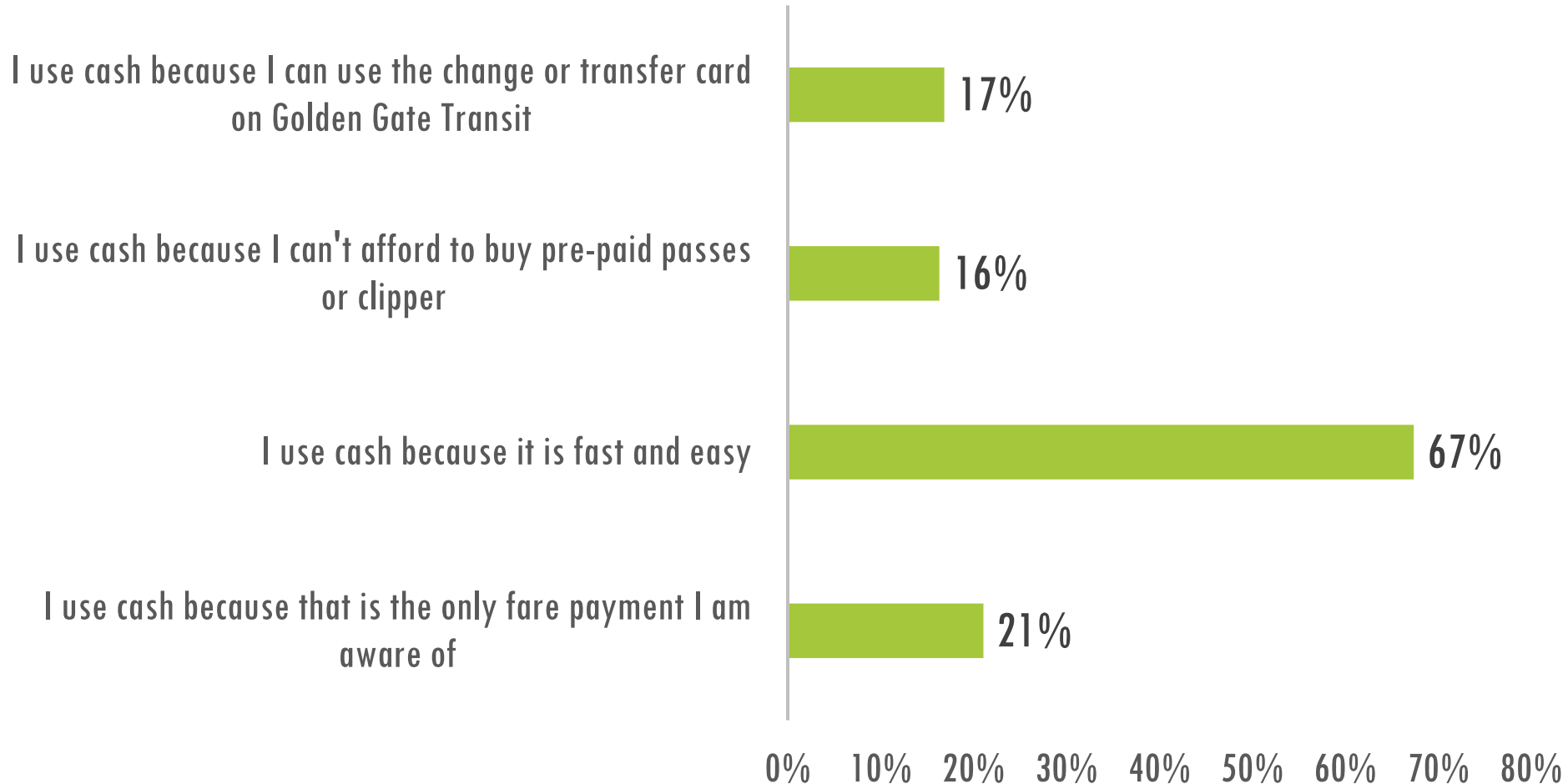
- Better understand why riders select their preferred payment option
- Identify awareness of the different fare media options
- Determine willingness to shift from cash to passes or Clipper
- Understand interest in mobile ticketing



## Summary of Survey

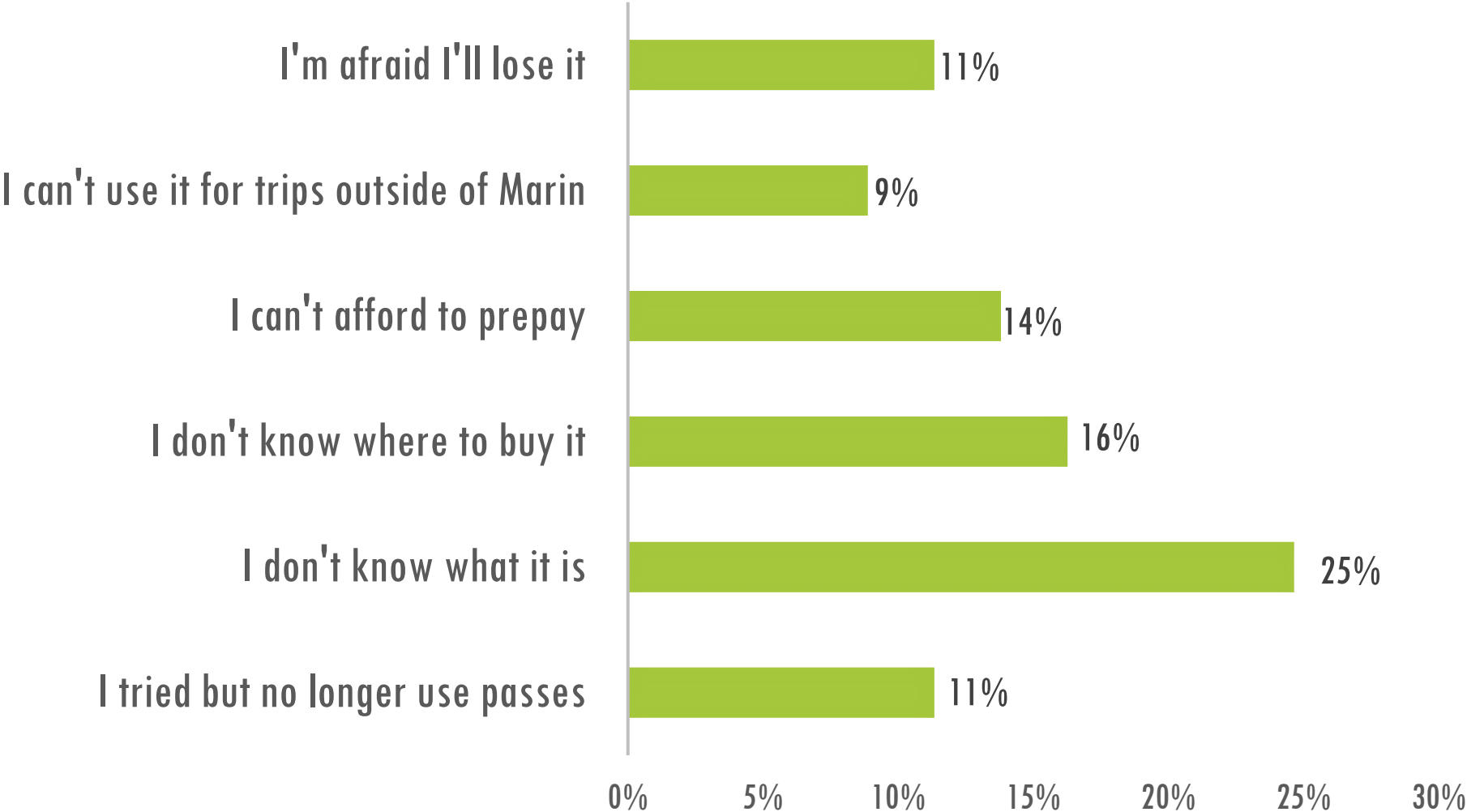
- Administer onboard vehicles and online in English and Spanish
  - Onboard survey administered on Routes 17, 22, 35, 36, 49, 71X, 219, 228, 233, 245
- 535 total responses; 301 responses from onboard riders, 234 responses online
- 85% of respondents identified themselves as transit riders
  - 17% of riders responded in Spanish; 25% of onboard surveys were completed in Spanish

## Q: Why did you choose to pay cash?

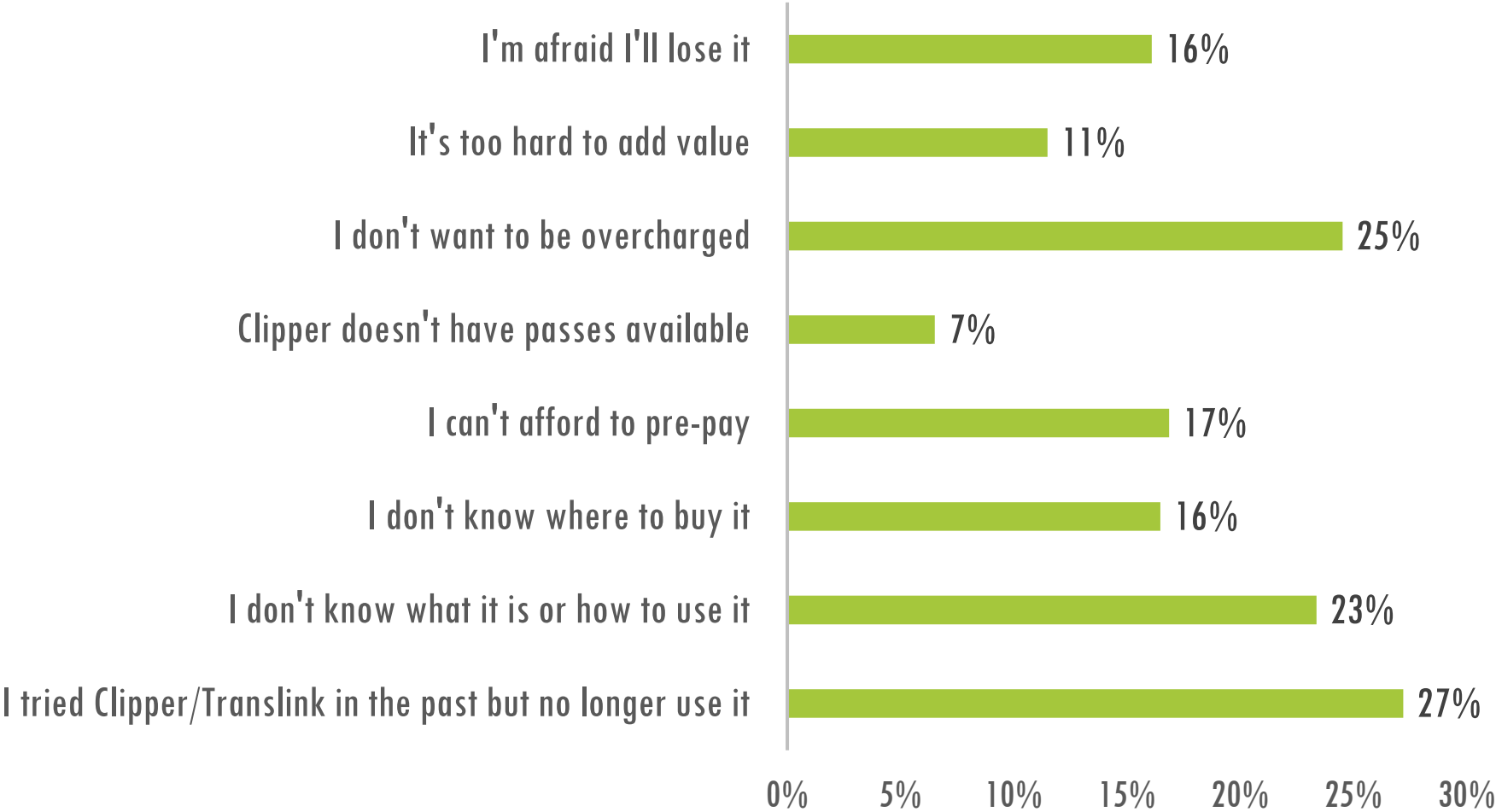




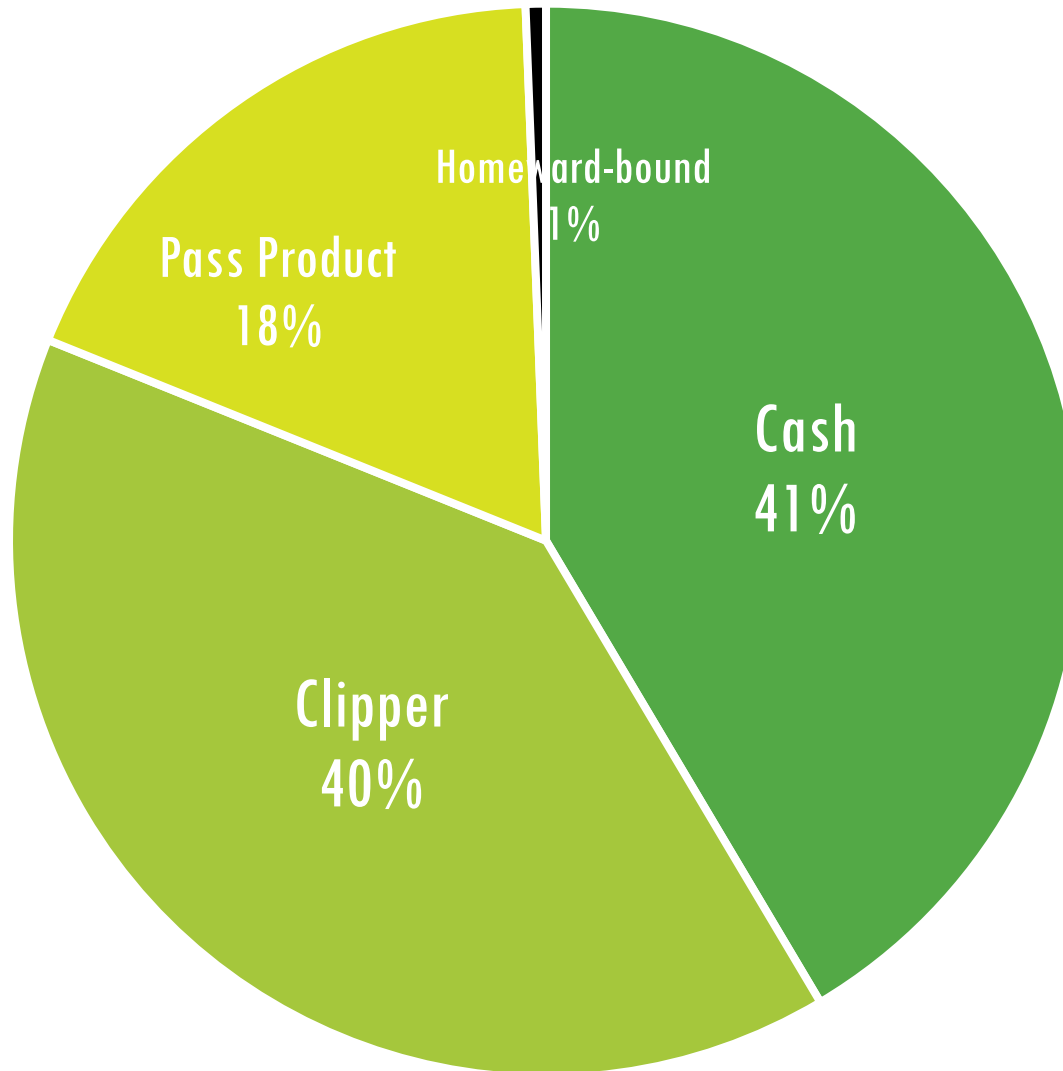
## Q: Why didn't you use a pass product?



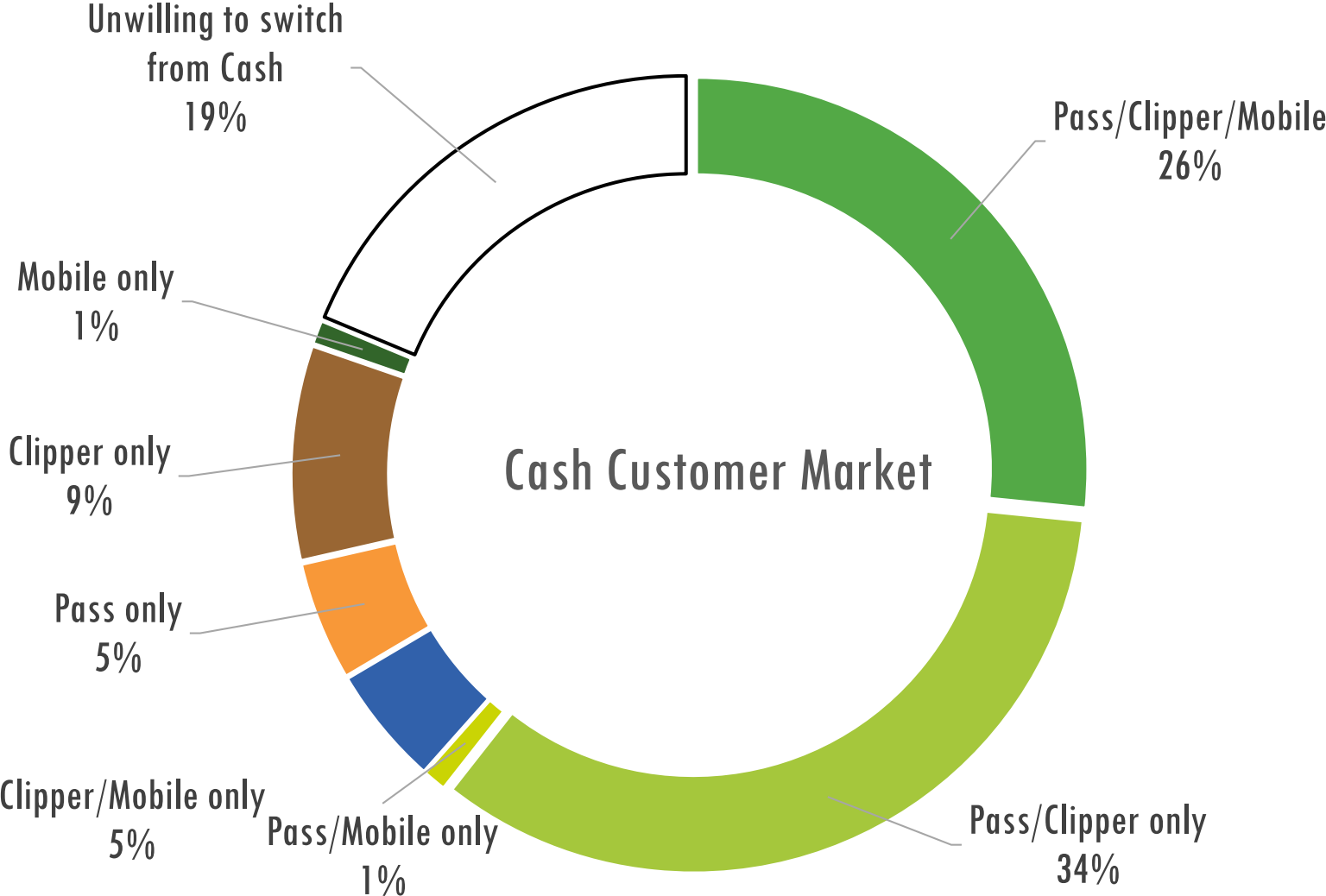
## Q: Why didn't you use Clipper?



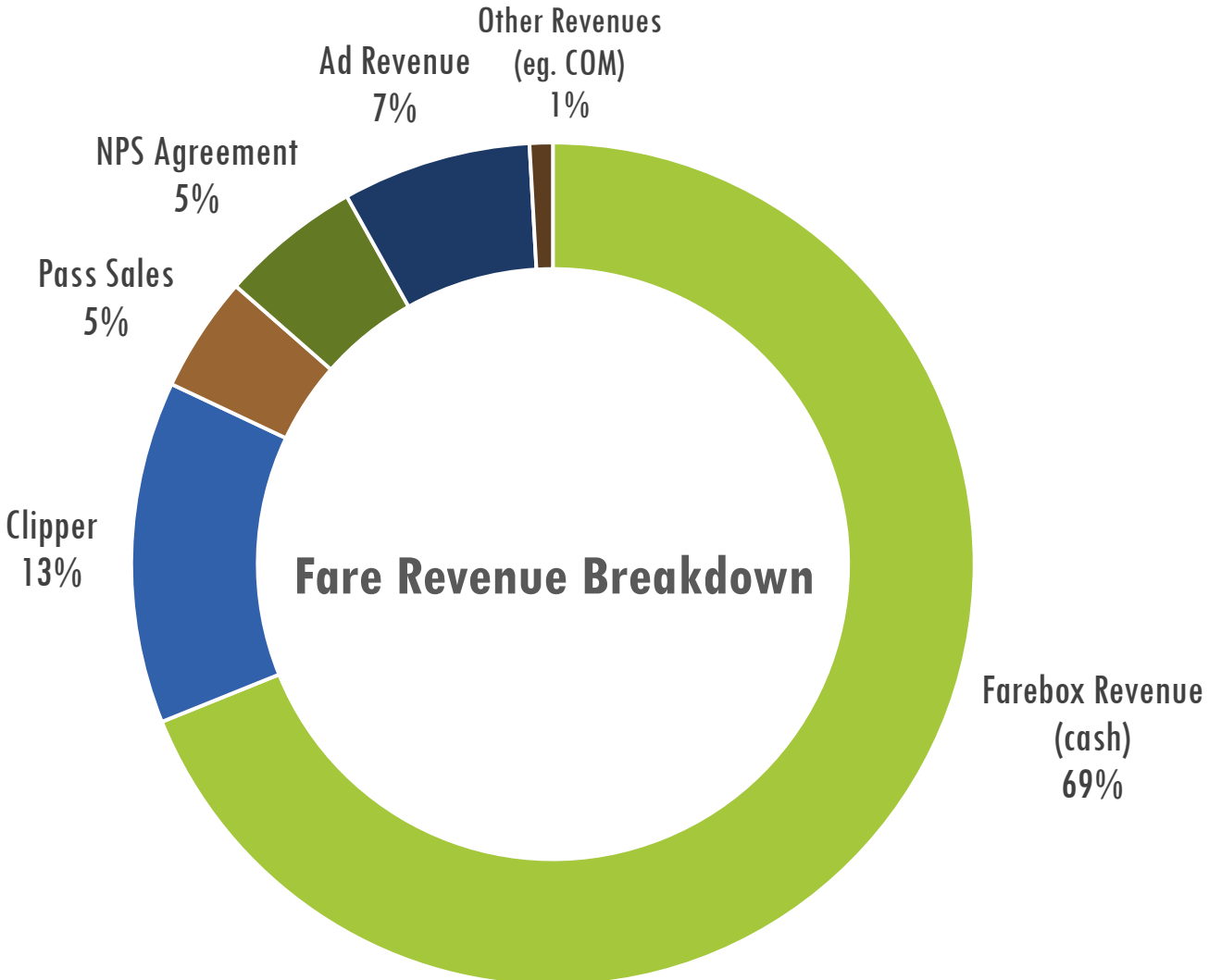
**Of those interested in mobile ticketing (67%), how do they currently pay?**



## Willingness to switch from cash to other payment options



# What Is Included In Fare Revenue?



- **Cost Effectiveness (Subsidy per Passenger Trip)**
  - $(\text{Total Operating Cost} - \text{Passenger Revenue}) / (\text{Number of Trips})$
  - Targets are identified for each service typology
  
- **Farebox Recovery**
  - $(\text{Total Fare Revenue}) / (\text{Total Operating Costs})$

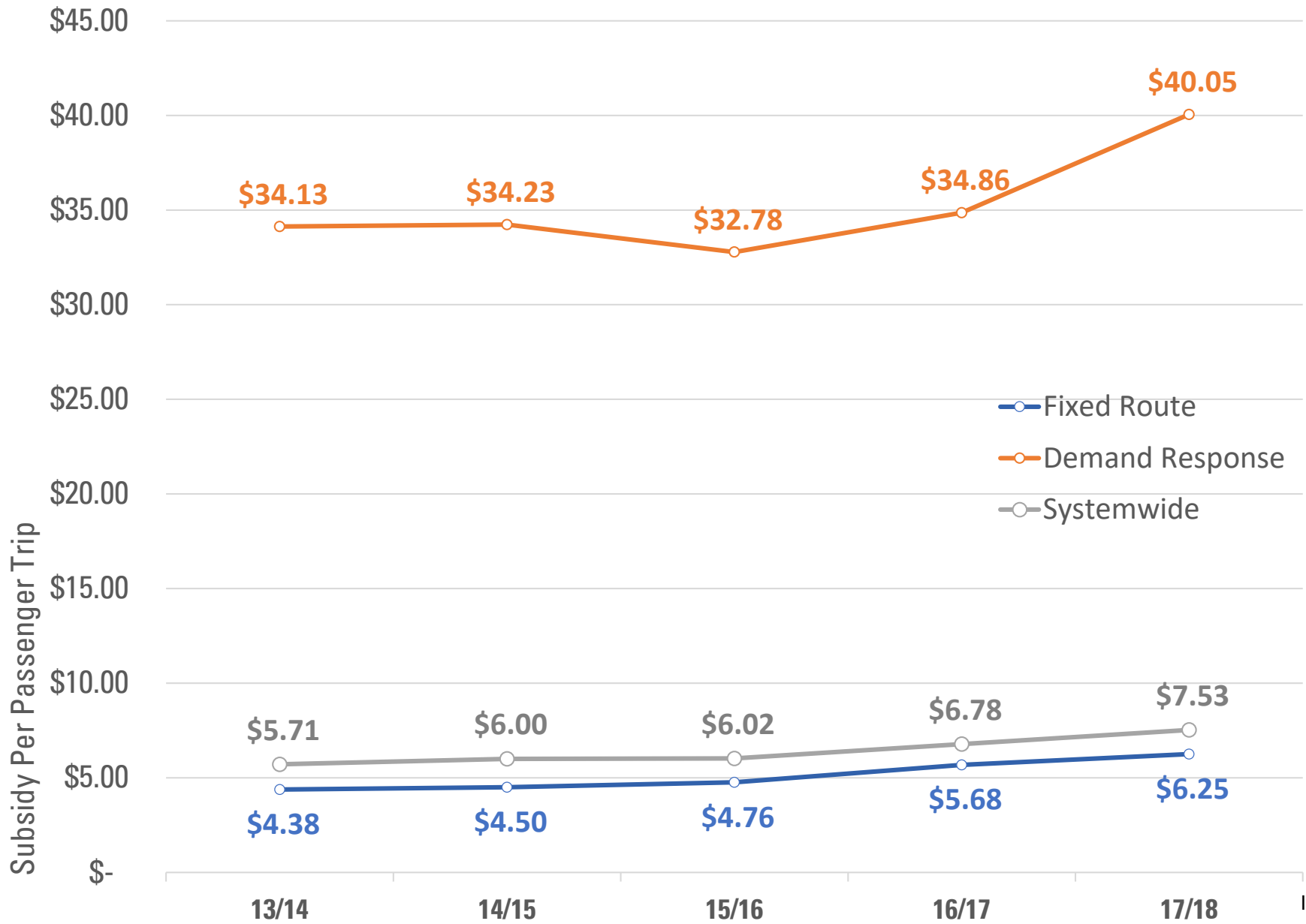
# Financial Performance Measures – Cost Effectiveness



Route Typology	Routes	Subsidy Target (maximum)	Current Performance (FY 2017/18)
Local Trunkline	35, 36, 71	\$4.50/passenger	<b>\$4.79</b> /passenger
Local Basic	17, 22, 23, 23X, 29, 49	\$6.50/passenger	<b>\$7.05</b> /passenger
Local Connector	219, 228, 233, 245, 251, 257	\$9.00/passenger	<b>\$9.96</b> /passenger
Supplemental	113, 115, 117, 119, 125, 139, 145, 151, 154	\$3.00/passenger	\$2.86/passenger
Rural	61, 68	\$12.00/passenger	<b>\$12.08</b> /passenger
Recreational	66/66F	\$3.00/passenger	\$2.28/passenger
Demand Response	Local Paratransit, Dial-A-Ride	\$35.00/passenger	<b>\$40.05</b> /passenger
Partnership	122 (College of Marin Express)	<i>no target<sup>(1)</sup></i>	\$5.89/passenger

**Red** indicates performance does not meet target

# Cost Effectiveness Trends



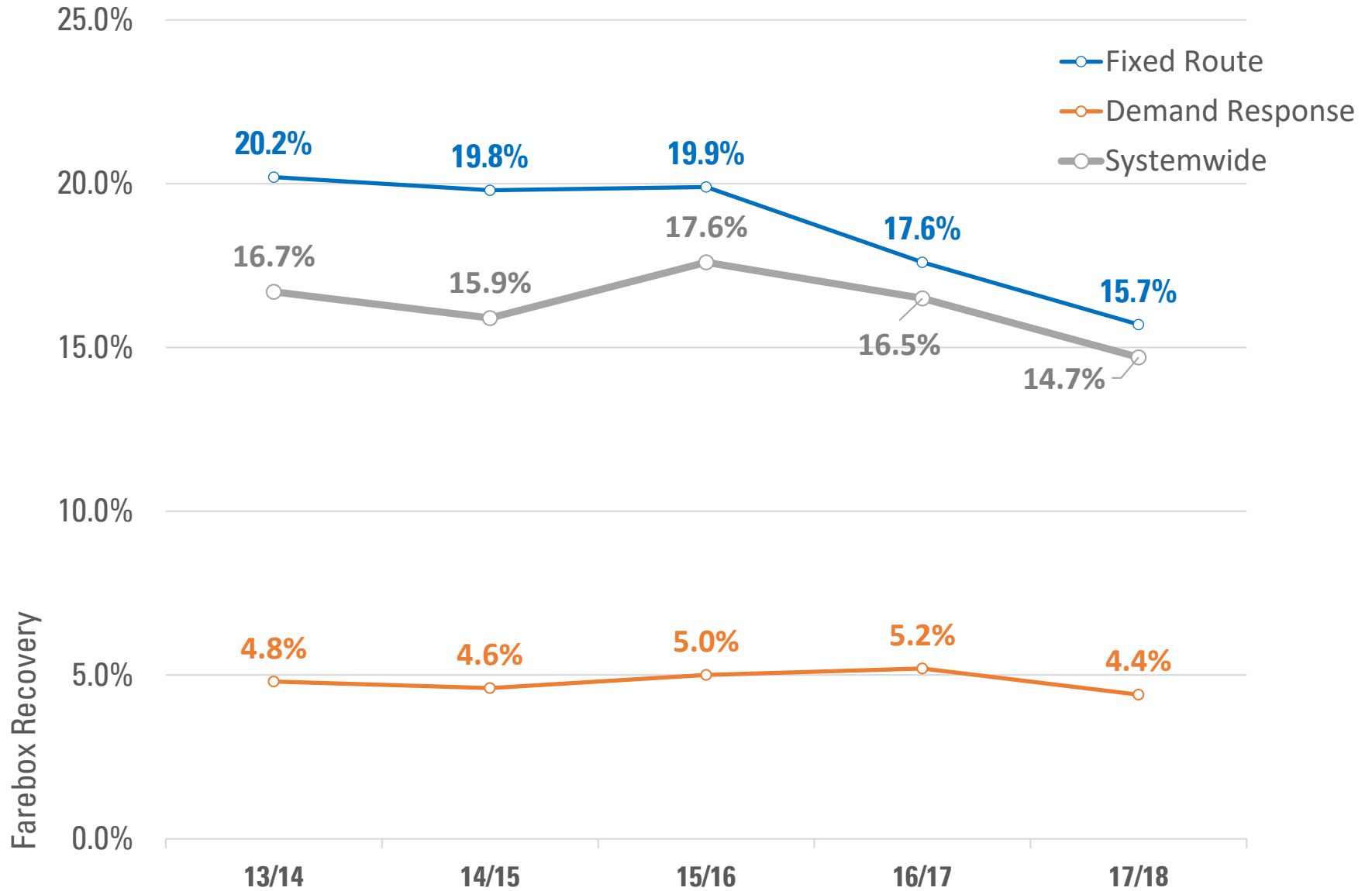


# Financial Performance Measures – Farebox Recovery



Route Typology	Routes	Current Performance (FY 2017/18)
Local Trunkline	35, 36, 71	18.1%
Local Basic	17, 22, 23, 23X, 29, 49	14.1%
Local Connector	219, 228, 233, 245, 251, 257	10.2%
Supplemental	113, 115, 117, 119, 125, 139, 145, 151, 154	16.4%
Rural	61, 68	8.0%
Recreational	66/66F	49.5%
Partnership	122 (College of Marin Express)	46.8%
<b>Fixed Route Total</b>		<b>15.7%</b>
Demand Response	Local Paratransit, Dial-A-Ride	4.4%
<b>Systemwide Total</b>		<b>14.7%</b>

# Farebox Recovery Trends



# Peer Agency Fare Policies and Eligibility



Agency	Farebox Recovery Ratio (FY2017/18)	Adult Fare	Youth Fare	Youth Fare % Adult Fare	Youth Age
Marin Transit	15%	\$2.00	\$1.00	50%	5-18
County Connection	13%	\$2.00	\$2.00	100%	6-64
FAST Fairfield and Suisun Area Transit	21%	\$1.75	\$1.50	86%	No youth fares
LAVTA	13%	\$2.00	\$2.00	100%	No youth fares
Petaluma Transit	8%	\$1.50	\$1.00	67%	5-18
SamTrans	10%	\$2.25	\$1.10	49%	Under 19
Santa Rosa City Bus	12%	\$1.50	\$1.25	83%	5-18
SolTrans	23%	\$1.75	\$1.50	86%	6-18
Sonoma County Transit	10%	\$1.50 - \$4.80 (zone based)	\$1.25-\$4.55 (zone based)	83%	6-18
Tri-Delta Transit	15%	\$2.50	\$2.50	100%	No youth fares
Napa Vine	7%	\$1.60	\$1.10	69%	6-18
WestCat	18%	\$1.75	\$1.75	100%	No youth fares

# Peer Agency ADA Paratransit Fares



Agency	Fixed Route Adult Cash Fare	Paratransit Fare
Marin Transit	\$2.00	\$2.00
County Connection	\$2.00	\$5.00
FAST Fairfield and Suisun Area Transit	\$1.75	\$3.50 - \$5.50 (zone based)
LAVTA	\$2.00	\$3.75
Petaluma Transit	\$1.50	\$3.00
SamTrans	\$2.25	\$4.25
Santa Rosa City Bus	\$1.50	\$3.00
SolTrans	\$1.75	\$3.00
Sonoma County Transit	\$1.50 - \$4.80 (zone based)	\$3.00 - \$4.80 (zone based)
Tri-Delta Transit	\$2.50	\$2.75
Napa Vine	\$1.60	\$3.20 - \$6.40 (zone based)
WestCat	\$1.75	\$1.25

- **MUNI Free Senior / Youth**
  - Income based program for households at or below 100% of Bay Area Median Income. Implemented on Clipper
- **Alameda County Student Transit Pass Program**
  - Free and reduced passes on AC Transit, LAVTA, and Union City Transit. Implemented on Clipper. Transportation CMA offsets fare loss for transit agencies.
- **Sonoma County Fare Free Program**
  - City sponsored fares to allow riders in local communities to ride fixed route services for free
- **VTA SmartPass**
  - Deep discount annual pass program offered to higher education, employers and non-profits. Cost is based on employer size and quality of transit service (bus only or bus+light rail)

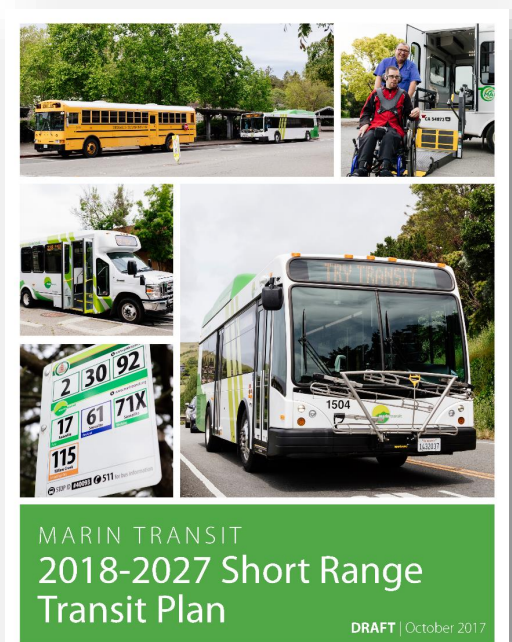
- **Clipper 2.0 (MTC)**
  - Conversion from Card-Based to Account-Based
  - Upgraded Onboard Equipment
  - Mobile App
  - Integration with Paratransit Fares
- **Regional Means Based Fare Pilot (MTC)**
- **Seamless Transit (SPUR)**
- **Transit Fare Integration Project (MTC)**
- **Solving the Bay Area's Fare Policy Problem (SPUR)**



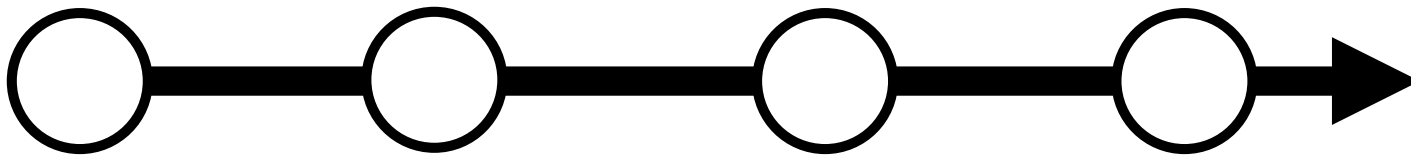
# Goals of 2018 SRTP Fare Recommendations



- Maintain cost effectiveness targets by service typology
- Offer fare media that encourages ridership and simplifies payment
- Keep Marin Transit fares in line with peer agencies
- Provide non-cash options to support operational efficiency
- Maximize social equity by providing mobility for all within the county



- Receive comments from your Board today
- Staff develop an updated fare proposal
- Test options in Short Range Transit Plan financial model
- Present formal proposal to consider in fall of 2019
- Conduct outreach and Title VI analysis
- Adopt fare change





# Thank You

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**Robert Betts**

**Director of Planning and Operations, Marin Transit**

**[rbetts@marintransit.org](mailto:rbetts@marintransit.org)**