



AFFORDABLE STUDENT TRANSIT PASS PILOT PROGRAM



Year One Evaluation Report

October 2017

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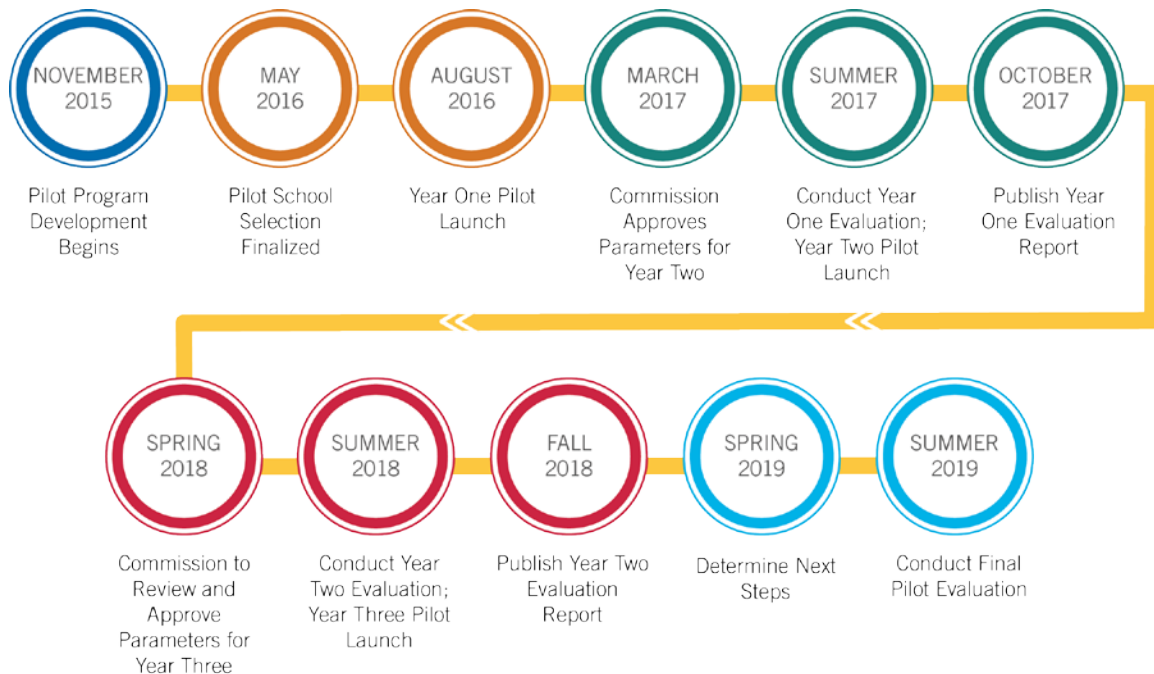
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Executive Summary

Middle and high school students often cite the cost of transportation to school as a barrier to school attendance and participation in afterschool activities. In recognition of this issue, the 2014 Transportation Expenditure Plan (TEP) of the Alameda County Transportation Commission (Alameda CTC) included implementation of an affordable student transit pass pilot program. Funded by Alameda County taxpayers through Measure BB, the Affordable Student Transit Pass Pilot (STPP) sets out to:

- Reduce barriers to transportation access to and from schools
- Improve transportation options for Alameda County's middle and high school students
- Build support for transit in Alameda County
- Develop effective three-year pilot programs
- Create a basis for a countywide student transit pass program (funding permitting)

With these goals in mind, the Alameda CTC is testing and evaluating different approaches to an affordable transit pass program for public middle and high school students in Alameda County over a three-year period.



Year One of the STPP implemented four different program models, which reflected the general characteristics of the student populations, transit service characteristics, school needs, and stakeholder input throughout the county and acknowledged financial constraints. In August 2016, the STPP launched at five high schools and four middle schools across four Alameda County Unified School Districts (USD). Table ES-1 summarizes Year One parameters and participation levels.

This document evaluates the outcomes of STPP Year One based on 18 qualitative and quantitative metrics adopted by the Commission in spring 2016. To find the location(s) in the Year One Evaluation Report that discuss(es) a specific metric, please see the Reference Table on page ES-4 of this Executive Summary.

Figure ES-1 Summary of Year One Program

School District	Year One Participating Schools	Program Model	Number of Students Eligible	Number of Passes ¹			Average Participation Rate
				AC Transit	Union City Transit	LAVTA/Wheels	
Oakland USD	<ul style="list-style-type: none"> ▪ Frick Impact Academy ▪ Castlemont High ▪ Fremont High 	Free + Universal	1,843	1,823	--	--	99%
San Leandro USD	<ul style="list-style-type: none"> ▪ John Muir Middle ▪ San Leandro High 	Free + Limited Grades	1,614	821	--	--	51%
New Haven USD	<ul style="list-style-type: none"> ▪ Cesar Chavez Middle ▪ James Logan High 	Discount + Limited Grades	2,270	125	77	--	9% ²
Livermore Valley Joint USD	<ul style="list-style-type: none"> ▪ East Avenue Middle ▪ Livermore High 	Discount + Means-Tested	2,441	--	--	82	3%

¹ Due to the varying STPP pass validity periods among the different pilot programs, the number of passes for OUSD and SLUSD represent the total number of STPP passes distributed that year. Since the NHUSD and LVJUSD STPP passes were valid for three and four months respectively, these numbers represent the average numbers of passes across Year One.

² The number of participants in the NHUSD program is slightly lower than the sum of the number of passes, due to some students purchasing both passes. This results in a slightly lower participation rate.

Key Findings on Program Impacts

These outcomes generally align with the first three goals of the STPP.

- **Higher Transit Use:** Participating students take transit more often. Year One of the STPP generated nearly 550,000 transit boardings across all participating schools, with an average of 1,632 daily boardings.
- **Better School Access:** Participating students and school administrative staff at each school site (referred to as school site administrators) reported easier access to school and increased attendance. About 14% of program participants reported missing fewer days of school than they did during the prior year (only 3% of eligible non-participants reported missing fewer days of school, compared to the prior year).
- **High Financial Benefit:** Two-thirds of participating students stated that the cost savings provided by this program was important to them and their families.
- **Increased Afterschool Involvement:** Involvement in non-school-based afterschool activities and afterschool jobs increased dramatically (by 77% and 238% respectively) for students participating in the STPP.
- **Positive Perceptions of Transit:** More than 80% of Year One participants reported positive associations with bus travel, affirming that they feel safe on the bus and that transit meets their needs.

Key Findings on Program Implementation

These outcomes generally align with the last two goals of the STPP.

- School site administrators reported that they were able to effectively manage the program. Nevertheless, there was consensus that administration of the discount pass programs was more complex and time-consuming than administration of the free programs.
- Transit operators reported that participating in the program was a generally positive experience. None reported any spikes in boardings or unruly students causing operational issues.
- Administrative costs associated with the STPP program team (Alameda CTC staff and consultants) were generally higher for program models that included multiple pass formats and that included collecting funds from students.
- The majority of administrative costs for the program team were expended on one-time efforts associated with developing and initiating the program. For Year One, the ongoing administrative costs were lower than the overall costs required for initiating the STPP.

REFERENCE TABLE: Year One Evaluation Performance Indicators

Indicators	Rationale	Report Location
Quantitative		
Transportation costs to families (participant cost)	To determine the financial burden of transportation to/from school	4-24
Participant or student attendance	To discern a relationship between pass program design and attendance	4-21
Pass availability and use	To determine the level of penetration of the pilot program (i.e., how many students could use the pass vs. actually use the pass)	4-1,4-27
After-school activity participation	To discern a relationship between pass program design and after-school activity participation	4-9
Student ridership	To determine the impact of the pass program on ridership (i.e., net and gross change in ridership)	4-3, 4-38
Diverse participant reach	To determine whether geographic diversity and equity are addressed	2-4, 4-27
Program cost per participant	To understand the overall cost-benefit ratio of the pass program	4-40
Administrative costs as a proportion of total program costs	To understand the overall cost-benefit ratio of the pass program	4-43
Qualitative		
Student perception of transit options and barriers	To understand how students understand transportation options and perceive barriers to accessing those options	4-18
Inclusion of students, parents, community members, administrators	To determine if community members are integrated and informed	4-27, 4-33
Effectiveness of marketing and outreach	To ensure that community members are integrated and informed	4-33
Linkages with existing fare payment option(s)	To discern if linkages with existing options affect pilot outcomes	4-36
Leverage with other school-based transportation programs	To discern if coordination with existing programs affects pilot outcomes	4-36
Leverage with other funding and administration programs	To understand potential for future funding opportunities	4-35
Transit operator response(s)	To understand how the pilot programs are perceived by transit operators	4-37
Ease of participation	To discern how students perceive the program model and how to use it	4-27

Indicators	Rationale	Report Location
Ease of administration (county-wide, site-level, operator-level)	To discern how program administration is perceived by different entities involved at different scales	4-29, 4-37
Cost performance against expectations	To understand or anticipate any potential future costs and issues	To be evaluated at the end of the 3-year pilot

1 Introduction

Middle and high school students often cite the cost of transportation to school as a barrier to school attendance and participation in afterschool activities. In recognition of this issue, the 2014 Transportation Expenditure Plan (TEP) of the Alameda County Transportation Commission (Alameda CTC) included implementation of an affordable student transit pass pilot program. Funded by Alameda County taxpayers through Measure BB, this program sets out to test and evaluate different approaches to an



affordable transit pass program for public middle and high school students in Alameda County over a three-year period. Through implementation of different pilot program models, the Alameda CTC hopes to identify successful models for expansion to create a basis for a countywide student transit pass program, funding permitting.

In March 2016, the Commission approved a framework for evaluating the pilot program models as part of the Affordable Student Transit Pass Pilot (STPP). In May 2016, the Commission approved the design for the first year of the STPP. The Alameda CTC successfully implemented four program models at nine middle and high schools across Alameda County during the 2016-2017 academic year. During summer 2017, the program team undertook a comprehensive evaluation of the program design and implementation of the Year One pilot program models in line with the Commission-approved framework.

This report is organized as follows:

- **Chapter 1** presents the overall goals and objectives of the STPP and summarizes the process and timeline for developing the Pilot.
- **Chapter 2** provides a profile of the Year One pilot parameters which included four program models implemented at four middle schools and five high schools.
- **Chapter 3** summarizes the STPP evaluation framework and the methodology utilized for evaluating Year One.
- **Chapter 4** presents the key findings of the Year One evaluation, focusing on the pilot program models' impact on students, their families, the participating schools, and participating transit agencies. This chapter also calls out key Year One outcomes with implications for implementation and administration.
- **Chapter 5** describes the program design for Year Two of the STPP implemented in the 2017-2018 academic year and how it incorporated Year One findings.

Program Goals and Objectives

The STPP aims to do the following:

- Reduce barriers to transportation access to and from schools
- Improve transportation options for Alameda County's middle and high school students
- Build support for transit in Alameda County
- Develop effective three-year pilot programs
- Create a basis for a countywide student transit pass program (funding permitting)

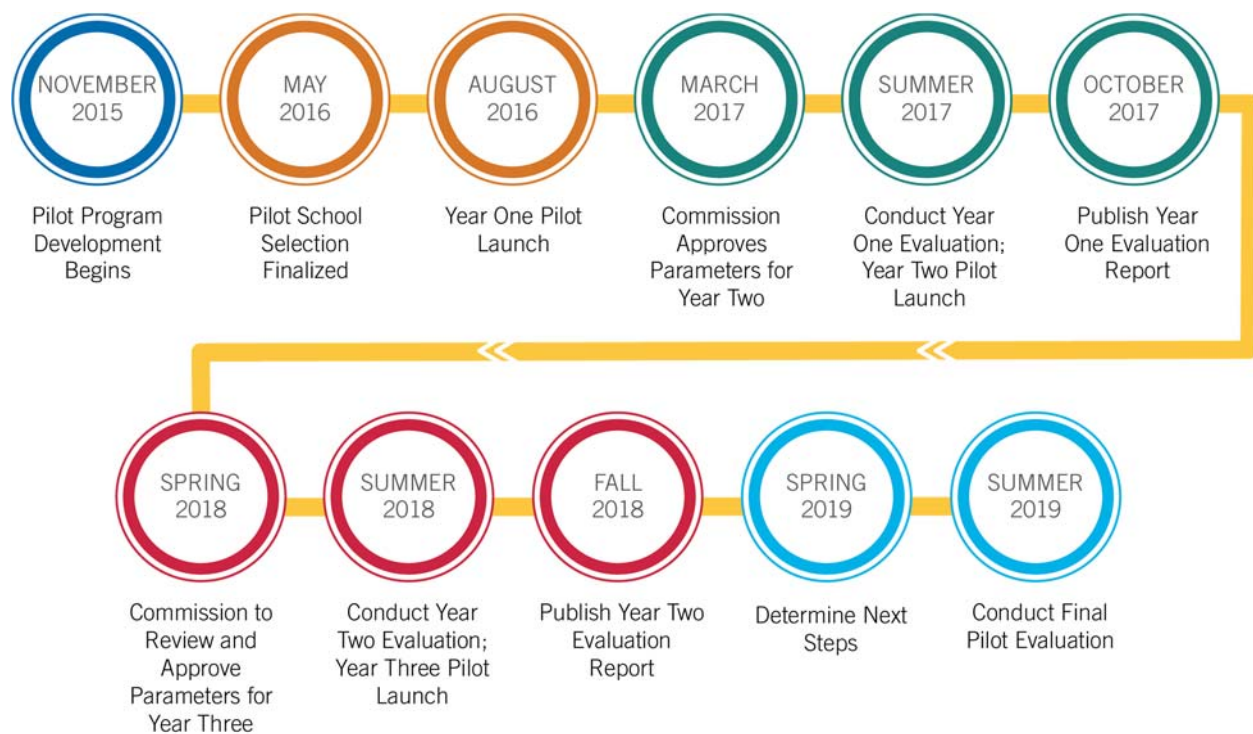
"The kids wear the [STPP] lanyard as a point of pride. They love it!"
East Avenue Middle School Administrator
(LVJUSD)

"I will go to school every day now even at the end of the month. When money runs out at end of month, there is no bus fare and there is no food. I can go to school now and always get something to eat so I'm not hungry. There is no reason to stay at home and not go to school."
Castlemont High School Student (OUSD)

With these goals in mind, the STPP provides an opportunity to assess student transportation needs in Alameda County and develop an approach to meet those needs with a sustainable program providing affordable student transit passes that can be used on the various transit providers that serve schools, afterschool activities, and job locations in Alameda County.

Background and Timeline

In 2014, Alameda County passed Measure BB, a half-cent sales tax to support transportation projects, programs, and planning throughout Alameda County. Measure BB's Transportation Expenditure Plan (TEP) includes \$15 million for funding one or more models for a student transit pass program to overcome financial barriers to student access to school and other opportunities. In 2015, working with community groups and regional stakeholders, Alameda CTC began development of a three-year pilot to test and evaluate various pilot program formats with the hope of creating the basis for the countywide program, funding permitting.

Figure 1-1 Timeline for STPP Development, Implementation, and Evaluation

Program Design

In March 2016, the Commission approved two frameworks as part of the development of the STPP:

1. Site Selection Framework: To select pilot program sites in each of four planning areas of the county (described below)
2. Evaluation Framework: To evaluate the effectiveness of each of the resulting pilot program models (described in Chapter 3)

The site selection methodology adopted by the Commission in March 2016 was a two-stage process that first produced a short list of 36 schools that are eligible to participate in the three-year pilot and second identified nine schools to participate in Year One. The first stage assessed public middle and high schools within each Alameda County planning area for financial need, proximity to transit service, student population size, school day structure, and other characteristics. During the second stage the program team used the short list to qualitatively assess schools' interest in being active partners in the STPP and ability to implement a pilot program. Figure 1-2 presents the characteristics used in the site selection process.³

For Year One, the program team developed four pilot program models to test, one in each of the four planning areas per Commission direction. These formats took into account the general characteristics of the student populations, transit service characteristics, school

³ Additional detail regarding the site selection process can be found in the March 2016 Commission memo: http://www.alamedactc.org/files/managed/Document/18434/6.6_Combos.pdf.

needs, and stakeholder input. The Alameda CTC Commissioners approved the parameters for Year One of the pilot in May 2016, described in further detail in Chapter 2.

Figure 1-2 STPP School Site Selection Characteristics for Assessment

Category	Characteristic(s)
School Type	<ul style="list-style-type: none"> ▪ Middle, high, mixed ▪ Charter/non-charter traditional
School Need	<ul style="list-style-type: none"> ▪ Income level as indicated through free and reduced-price meal (FRPM) eligibility
Transit Presence	<ul style="list-style-type: none"> ▪ Bus stop within ¼ mile of the school ▪ Number of routes serving schools
Geographic Location	<ul style="list-style-type: none"> ▪ North, Central, South, East County planning areas ▪ Paired schools (e.g., schools located near one another, middle schools that feed a particular high school, a high school that draws from select middle schools, etc.)
Existing Programs	<ul style="list-style-type: none"> ▪ Presence of Safe Routes to Schools programs and other unique attributes of potential model program sites
Other Characteristics	<ul style="list-style-type: none"> ▪ Percent minority of student population ▪ Ethnic diversity of student population ▪ School interest ▪ School readiness ▪ Availability of crossing guards ▪ Potential student and community participation

Year One Program Implementation

In anticipation of launching the Year One pilot program models in academic year 2016-2017, the Alameda CTC signed memoranda of understanding (MOUs) with the school districts of the participating schools (Oakland Unified, San Leandro Unified, New Haven Unified, and Livermore Valley Joint Unified), as well as three participating transit agencies (AC Transit, Union City Transit, and Livermore Amador Valley Transit Authority (LAVTA/Wheels)). These MOUs established cooperation among the participating entities, including the sharing and protection of data essential to evaluating the STPP's impacts.

In Summer 2016, the program team developed all necessary materials and processes for implementing the four pilot program models in line with these agreements, including registration and consent forms, student informational materials, protocols for participating schools to enroll students and distribute passes, and processes for replacing and deactivating transit passes. All documents were available to students and families in both English and Spanish.

Year One of the STPP began in August 2016 at five high schools and four middle schools across Alameda County, when eligible students could chose to enroll in the STPP during school orientation. Many of them were able to begin using their transit passes immediately. Program team members attended all school orientations to train staff in enrollment processes and educate students and families about the STPP.

Throughout the 2016-2017 academic school year, the program team supported the schools in day-to-day management of the program in addition to targeted outreach efforts via travel training and educational events at multiple schools to encourage participation in the latter half of the year. The program team also conducted two surveys to inform Year Two program design and provide key information for the Year One evaluation. The program

team coordinated regularly with the participating transit agencies to understand administrative efforts and resolve any issues.

Chapter 2 describes further the pilot program models and the schools selected for participation in Year One.

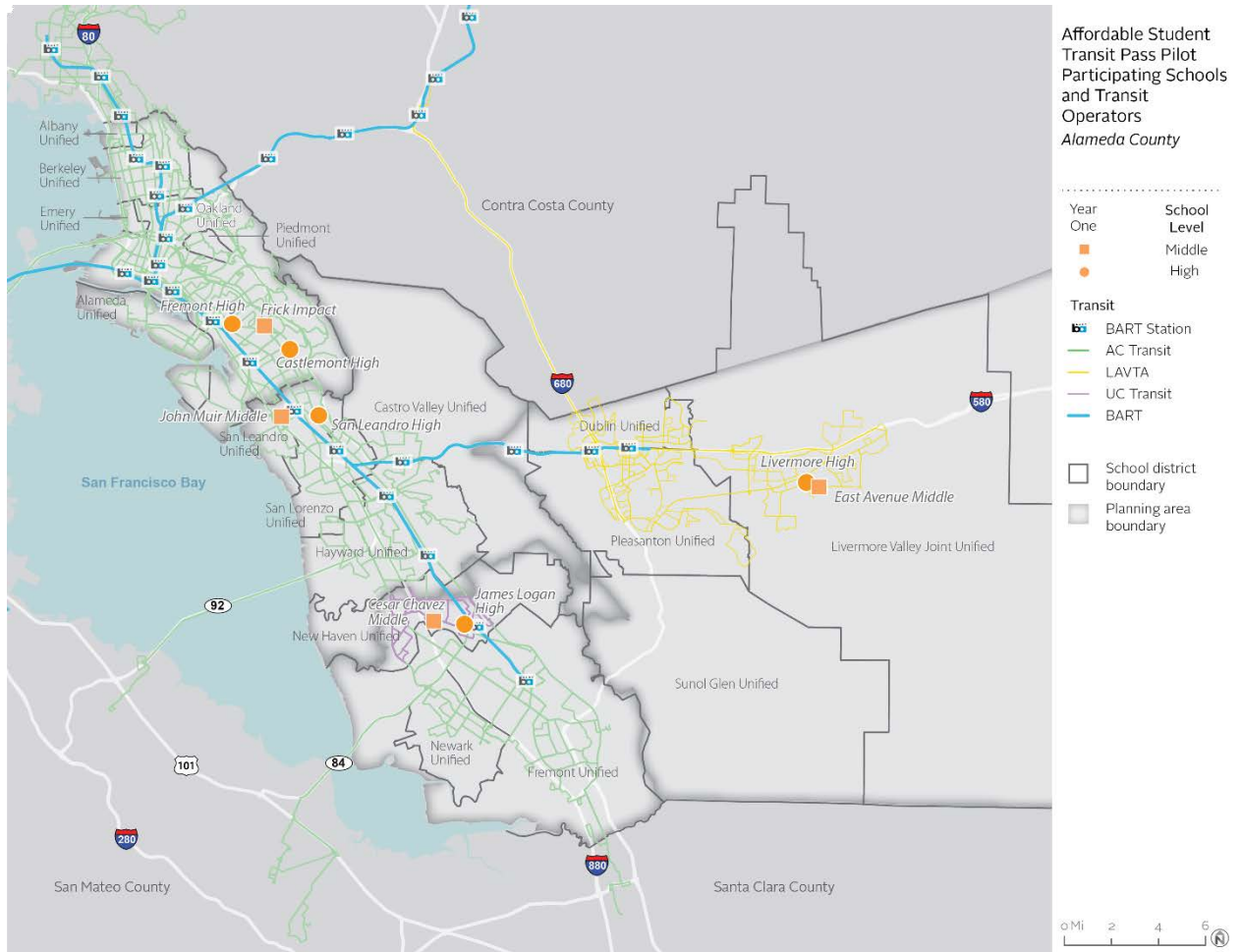
STPP Years Two and Three

In March 2017, the Commission approved the parameters for Year Two informed by a mid-year assessment of Year One. Alameda CTC anticipates that Year Two will run through academic year 2017-2018 followed by a Year Two evaluation report. The third and final year of the STPP will run through academic year 2018-2019 and will culminate in a Year Three evaluation report that encompasses key findings across the three-year pilot period and provides recommendations for establishing a countywide program.

2 Year One Pilot Schools and Parameters

For Year One of the STPP, four different pilot program models were implemented, one in each Alameda County planning area, based on school characteristics and availability of transit pass options. Each program model was implemented in one school district. This chapter summarizes the Year One program parameters for each of the participating school districts.

Figure 2-1 Countywide Map of Year One Participating Schools and Transit Operators



Year One Pilot Program Parameters

Figure 2-2 presents the parameters of the different pilot program models and identifies which elements were implemented in each school district. Year One tested program models that varied in pass format, student eligibility, and pass price. The pilot parameter applied in each program model generally reflected the school's financial need and transit service availability as determined in the site selection process. For instance, schools with the greatest level of financial need participated in pilot formats with free transit passes. At the time of implementation, Union City Transit and LAVTA/Wheels did not have an appropriate transit pass product available on Clipper; therefore, schools served by these systems received transit passes in the format of a "flash pass," i.e., stickers affixed to student ID cards that students showed upon boarding the bus.

The program team designed the Year One program with financial limitations in mind, recognizing the need to run the STPP for three years and to avoid spending the allotted funding too quickly. As such, the Year One pilot program models were designed to test different ways of limiting budget impacts. For example, several program models involved providing transit passes at a discount or limiting student eligibility to certain grades to diminish the financial burden on Alameda CTC. For those programs where STPP transit passes were sold at a discount, students could purchase them on a quarterly and trimester basis for Union City Transit and LAVTA/Wheels, respectively, to break up the cost of the pass throughout the year.

The combinations of features in Figure 2-2 represent five unique program models, all but one of which were tested in Year One (see Program Changes section below). To facilitate comparisons among the program models, this report uses the following names to highlight the most notable program model characteristics that differentiate them:

- **Oakland USD:** Free + Universal
 - All students were eligible to receive a free Clipper card with unlimited access to AC Transit bus services.
- **Berkeley USD:** Information-Only
- **San Leandro USD:** Free + Limited Grades
 - Students in 8th-10th grades were eligible to receive a free Clipper card with unlimited access to AC Transit bus services.
- **New Haven USD:** Discount + Limited Grades
 - Students in 8th-10th grades could purchase an AC Transit youth pass for \$60 per semester (approximately \$10 per month), and/or a Union City Transit youth pass for \$54 each quarter (approximately \$18 per month).
- **Livermore Valley JUSD:** Discount + Means-Tested
 - All students could purchase a discounted LAVTA/Wheels adult pass for \$120 each trimester (approximately \$30 per month).⁴
 - Students who were eligible for free/reduced-price meals (FRPM) could receive a pass at no cost.

⁴ LAVTA/Wheels currently does not provide a youth pass.

All Year One pilot program models included the following characteristics:

- Information and training for students was provided on using transit and the applicable passes.
- All passes were valid year round, and not limited by day or time.
- A designated on-site administrator was assigned at each school, who received training associated with the applicable program model.

Year One Program Model Changes

As is the nature of a pilot, several program model changes occurred following Commission approval of the program design as part of the Year One implementation.

Alameda CTC, in its development of the STPP, identified BART as a transit operator partner. BART youth ticket options are distinct from all other pass types used in the STPP because they have a fixed monetary value rather than a period of validity with unlimited usage. Given the different nature of the passes and budget limitations, Alameda CTC determined that BART passes would be rolled out in Year Two of the Pilot (2017-18 academic year) to give the program team time to determine the best strategy for providing BART tickets to students. The team did collect information on student usage of BART during the Year One surveys to inform integration of BART into the STPP in Year Two.

Although five program formats were designed, only four were implemented in Year One. Despite significant outreach to Berkeley's REALM Charter Middle and High Schools, which were selected to participate in an information-only program, the schools were unresponsive and/or indicated a lack of interest in participating in the program. As such, the program team chose not to implement this information-only program model in Year One.

Figure 2-2 Year One Pilot Program Parameters

Parameters	Options Tested	Oakland USD, Oakland	Berkeley USD, Berkeley	San Leandro USD, San Leandro	New Haven USD, Union City	Livermore Valley Joint USD, Livermore ⁵
Schools	High Schools	Castlemont High School* Fremont High School	Realm High School	San Leandro High School*	James Logan High School*	Livermore High School
	Middle Schools	Frick Impact Academy	REALM Middle School	John Muir Middle School*	Cesar Chavez Middle School*	East Avenue Middle School*
Pass Format	Clipper	■		■	■	
	Flash pass				■	■
Eligibility	Universal (all students)	■				■
	Specific grades			■	■	
Pass Price	Free to students	■		■		■
	Discounted				■	■
	Non-discounted; Information only		■			
Financial Need ⁶	High Level of Need	■		■		
	Moderate Level of Need				■	
	Low Level of Need					■
Transit Service	AC Transit	■		■	■	
	BART	■		■	■	■
	Union City Transit				■	
	LAVTA/Wheels					■

* Indicates that the school was enrolled in the Safe Routes to Schools (SRTS) program at the beginning of Year One of the STPP.

⁵ Livermore Valley Joint USD will hereafter be referred to as Livermore Valley JUSD.

⁶ Financial need as indicated by the percentage of students eligible for Free/Reduced-Priced Meals (FRPM) in the Year One participating schools. Eligibility for FRPM is often used as a proxy for low-income/poverty.

3 Evaluation Methodology

This chapter describes the STPP program evaluation framework, including the quantitative and qualitative performance measures used to understand how well each of the program models supports the goals of the STPP. This chapter also summarizes the key data sources used for evaluating the programs as well as caveats to keep in mind while interpreting the analysis in Chapter 4.

Program Evaluation Metrics

When the Commission first approved the STPP, they also adopted an evaluation framework to measure its outcomes. The evaluation framework is a working set of 18 quantitative and qualitative metrics, some of which have been refined since initial program approval to better reflect available data and a reasonable level of effort for school site and transit operator staff.⁷ The two tables below lay out the evaluation metrics in detail: the table in Figure 3-1 describes the rationale and data requirements for each metric; the table in Figure 3-2 shows how the metrics align with the five program goals articulated for the STPP. The last metric, *Cost performance against expectations*, will only be evaluated at the end of the three-year pilot; the other 17 metrics are discussed in this Year One Evaluation Report.

The Year One Evaluation Report utilizes data from multiple sources, including the following:

- Program participation rates and pass quantities from internal tracking databases
- Transit ridership data from Clipper transactions and bus driver tracking
- School-specific data on enrollment, attendance, and truancy
- Student responses to survey questions included on enrollment waivers
- Student responses to school-wide surveys in fall 2016 and spring 2017
- Debrief sessions with school site administrators, school district staff, and transit agency staff liaisons
- Focus groups conducted by community groups and stakeholders and testimonials collected by school staff
- Comments by parents and students noted during on-site registration sessions and travel training activities

⁷ After Commission approval, the metric “Inclusion of students, parents, community members, administrators” was moved from quantitative to qualitative due to an initial mis-categorization and some minor changes were made to data sources and timelines due to limitations in data availability and to align data requests with the realities of demands on the school site administrators’ time. The tables presented here show the current metrics after these minor revisions.

Figure 3-1 Performance Indicators and Metrics for Program Evaluation

Indicators	Rationale	Metric	Data Source
Quantitative			
Transportation costs to families (participant cost)	To determine the financial burden of transportation to/from school	Amount that families pay for school transportation and/or the pass	Determined as part of program model parameters; surveys
Participant or student attendance	To discern a relationship between pass program design and attendance	Average daily attendance	Mandated school reporting
Pass availability and use	To determine the level of penetration of the pilot program (i.e., how many students could use the pass vs. actually use the pass)	Number of eligible students; Number of passes distributed; Number of passes used (depending on choice of fare media)	School sites, transit operators, and Clipper if applicable
After-school activity participation	To discern a relationship between pass program design and after-school activity participation	Attendance of students at key clubs, activities, and organizations associated with each site	Waiver forms and student surveys
Student ridership	To determine the impact of the pass program on ridership (i.e., net and gross change in ridership)	Number of passes provided; Agency-level student ridership	Transit operators
Diverse participant reach	To determine that geographic diversity and equity are addressed	Demographic information of program sites	Determined as part of program model parameters
Program cost per participant	To understand the overall cost-benefit ratio of the pass program	Overall program costs per participant, beyond what the pass price is (if applicable)	Program model parameters; Financial information provided by schools, county agencies, and transit operators
Administrative costs as a proportion of total program costs	To understand the overall cost-benefit ratio of the pass program	Costs borne by the transit operators, schools, etc. Including costs with an on-site administrator	Financial information provided by schools, county agencies, and transit operators

Indicators	Rationale	Metric	Data Source
Qualitative			
Student perception of transit options and barriers	To understand how students understand transportation options and perceive barriers to accessing those options	Number and extent to which students perceive pass options and barriers to accessing those options, including cost	Surveys or focus groups conducted by program team and school sites
Inclusion of students, parents, community members, administrators	To determine if community members are integrated and informed	Engagement & participation in program activities: periodic stakeholder group meetings, school-based outreach/tabling, travel training, surveys	Sign-in sheets, survey response rate, public comment submissions, formal/informal community feedback
Effectiveness of marketing and outreach	To ensure that community members are integrated and informed	Extent to which participants know about the program	Student feedback (via focus groups and/or surveys)
Linkages with existing fare payment option(s)	To discern if linkages with existing options affects pilot outcomes	Key features of fare payment options	Determined as part of program model parameters; Clipper if applicable
Leverage with other school-based transportation programs	To discern if coordination with existing programs affects pilot outcomes	Aspects that benefit related programs (SR2S, crossing guards, etc.)	Determined as part of program model parameters
Leverage with other funding and administration programs	To understand potential for future funding opportunities	Key findings regarding funding eligibility and partnerships	Feedback from school sites, transit operators, other stakeholders
Transit operator response(s)	To understand how the pilot programs are perceived by transit operators	Perceived impacts of program to service delivery	Transit operator feedback
Ease of participation	To discern how students perceive the program model and how to use it	Perceived ease of use of program model	Participant surveys
Ease of administration (program-wide, site-level, operator-level)⁸	To discern how program administration is perceived by different entities involved at different scales	Perceived ease of administration by school sites, transit operators, and county-wide coordination	Feedback from school sites, transit operators, other stakeholders
Cost performance against expectations	To understand or anticipate any potential future costs and issues	Degree to which any cost overruns represent "one-time" versus recurring and/or unpredictable issues	Feedback from school sites, transit operators, other stakeholders

⁸ Metrics associated with this indicator may be used to evaluate potential implications for the level of decentralized oversight and potential for replication in other schools.

Figure 3-2 Alignment of Program Goals and Performance Measures

Goals/Indicators	Goal 1: Reduce barriers to transportation access to and from schools	Goal 2: Improve transportation options for Alameda County's middle and high school students	Goal 3: Build support for transit in Alameda County	Goal 4: Develop effective three-year pilot programs
<i>Quantitative Metrics</i>				
Transportation costs to families (participant cost)	■	■		■
Participant or student attendance	■			
Pass availability and use	■			
After-school activity participation		■		
Student ridership (including non-passholders)		■	■	
Diverse participant reach				■
Program cost per participant				■
Administrative costs as a proportion of total program costs				■
<i>Quantitative Metrics</i>				
Student perception of transit options and barriers	■	■	■	
Inclusion of students, parents, community members, administrators			■	■
Effectiveness of marketing and outreach	■		■	■
Linkages with existing fare payment option(s)		■	■	
Leverage with other school-based transportation programs	■	■		

Goals/Indicators	Goal 1: Reduce barriers to transportation access to and from schools	Goal 2: Improve transportation options for Alameda County's middle and high school students	Goal 3: Build support for transit in Alameda County	Goal 4: Develop effective three-year pilot programs
Leverage with other funding and administration programs		■		
Transit operator response(s)	■	■	■	■
Ease of participation	■	■		■
Ease of administration (county-wide, site-level, operator-level)	■	■		■
Cost performance against expectations				■

Key Caveats for Data Analysis

Year One of the STPP allowed students to enroll (and un-enroll) throughout the school year. As such, student participation fluctuated often. As a general matter, this report will distinguish between “participants” (students who had an activated pass assigned to them at any point during the year) and “non-participants” (students who did not engage with the program during Year One, or those students who may have started the process but did not complete enrollment and receive a pass). Where comparative analysis is warranted, the analysis will typically compare the behavior of participants with those non-participants who were otherwise eligible but opted not to participate, in order to isolate differences that are strictly attributable to Year One. In some cases, feedback was solicited from ineligible non-participants⁹ to inform program design. Where their experience is relevant, it is included in the analysis. The following section provides further detail regarding the data sources used in this Evaluation Report.

Participation Profile

As shown in Chapter 4, participation in Year One varied widely among the four different Districts/programs. For example, nearly two-thirds of participants during Year One were in Oakland (Free + Universal), whereas Cesar Chavez Middle School in Union City (Discount + Limited Grades) sold an average of eight passes over the entire school year. As such, pilot data that is reported at the aggregate level is heavily skewed towards Districts with higher participation rates and therefore findings may not necessarily be representative of student transit need and behavior across the county.

⁹ Ineligible non-participants are students in San Leandro USD and New Haven USD who could not participate even if they had wanted to because they were not in the grades that were offered the program in Year One. Students of all grades in the OUSD and LVJUSD participating schools were eligible.

Student Survey Data

Much of the data analyzed in this report came from surveys distributed to students in the four different programs. Students participated in two surveys, one in fall 2016 and one in spring 2017. Response rates varied greatly by school and by survey period. As a result, the responses received are not a proportional sampling of the student population nor the participant population; results are sometimes dominated by high numbers of responses from certain sub-groups of students. Some of these variations are described below and all results presented in the report should be interpreted with this background in mind. Despite these caveats, the surveys do provide valuable qualitative insight into program impacts.

Figure 3-3 Fall 2016 Survey Response Rate

	Survey Respondents		Comparison of Survey Respondents to Participants	
	<i>% of Participants</i>	<i>% Non-Participants</i>	<i>Respondents as % of Participants</i>	<i>Respondents as % of Eligible Students</i>
OUSD	89%	11%	29%	30%
SLUSD	63%	37%	13%	11%
NHUSD	12%	88%	91%	74%
LVJUSD	13%	87%	115%	38%
All Participating Schools	27%	73%	33%	41%

Figure 3-4 Spring 2017 Survey Response Rate

	Survey Respondents		Comparison of Survey Respondents to Participants	
	<i>% of Participants</i>	<i>% Non-Participants</i>	<i>Respondents as % of Participants</i>	<i>Respondents as % of Eligible Students</i>
OUSD	89%	11%	19%	22%
SLUSD	33%	67%	21%	16%
NHUSD	24%	76%	35%	7%
LVJUSD	10%	90%	37%	15%
All Participating Schools	41%	59%	21%	14%

For example, whereas the highest STPP participation levels were in Oakland USD and approximately 60% of STPP participant survey responses were from Oakland USD as would be expected, only 21% of overall survey responses came from Oakland USD, with corresponding over-representation from the other three programs. Further, more than two-thirds of all responses to the fall survey were from non-participants and more than half of these non-participants were from a single school. The fall survey focused on rapidly identifying lessons that could be used to refine the program design, so the non-participant responses were valuable, even if they could not be used to evaluate the program's effectiveness for participants.

Response rates from different sub-groups of students also varied widely by program. Almost three quarters of eligible students in New Haven USD responded to the fall survey, but only 11% of eligible students in San Leandro USD responded. The proportion of eligible students in each program and the number of participants in each program who responded was generally more balanced in the spring survey. However, the total responses received from each program was not consistent, so the spring 2017 survey overall is also not a representative sample of results across all schools.

Transit Agency Data

In Year One, different methods were used to collect and summarize data for each of the three transit operators. AC Transit boardings were recorded via Clipper tags, while Union City Transit and LAVTA/Wheels relied on bus drivers manually counting each use of an STPP flash pass at the farebox. This means the data available for analysis differs by transit operator and by program model.

Clipper data is available at the trip level, which allows for a timestamp for each STPP boarding on AC Transit. Trip records only include route numbers for about half of all records, so data quality issues prevent the route information from being reliably used. The program team is currently working with transit agency staff to improve the quality of this data and make it available for evaluation. To protect student privacy, serial numbers were stripped from the Clipper data before transmittal, and for Year One, the Clipper data was grouped by program model/school district – not at the school-level. Thus, it is not possible to distinguish travel trends between middle school and high school students, but it is anticipated this segmentation will be available in Year Two.

Flash pass data from Union City Transit and LAVTA/Wheels is summarized by day/date and route, without the individual timestamps from each trip using an STPP transit pass. Because of the lack of reliable route information in the Clipper data, no route-level analysis was pursued across the three transit operators in Year One. It is expected that the transition to Clipper in Year Two for these two operators will facilitate more efficient analysis and comparisons.

4 Key Findings

This chapter is separated into two sections. The first discusses the Year One pilot's impacts on participants, discussing how participants used transit and the STPP passes, their perceptions of transit, and the pilot's financial benefits for students and families. The second section discusses findings from Year One that had implications for administration and implementation of the program; many of these elements directly influenced the program design of Year Two, which is summarized in Chapter 5.

Part I. Year One Pilot Impacts on Participants

A. Student Use of Transit

Year One Program Participation

-  **Nearly 3,000 students participated in Year One of the STPP with free transit pass program models showing the highest participation rates.**

Participation varied widely among the four different program. For example, nearly 100% of students in Oakland (Free + Universal) participated in the program, whereas an average of eight students participated each period from Cesar Chavez Middle School in Union City (Discount + Limited Grades).

The two program models with free transit passes saw the highest rates of participation. The participation and usage rate was lower in San Leandro USD than in Oakland USD. This was likely related in part to program model design as well as factors such as differences in transit service levels, land use patterns, and student financial need. As far as program design, the analysis suggests that the students who used the pass the most tended to be 11th and 12th graders (high school juniors and seniors). However, in the case of the San Leandro USD program, only 9th and 10th graders were eligible. In addition, anecdotal evidence indicates that some families with students in multiple grades were less interested in getting a pass for only one student if they still had to drive the other non-eligible student(s) to school.

It is important to note that it is difficult to draw conclusions from these participation rates about student transit need and behavior in different parts of the county due to the fact that a different program model was tested in each area. Year Two of the Pilot was designed to have comparable programs in different areas in order to be able to draw better conclusions and direct comparisons (see Chapter 5).

Participation also varied over the course of the school year. In the discounted programs, participation dropped over the course of the year as students who tried the program at the start of the year learned they did not use the pass enough to justify the cost and did not purchase a pass in subsequent pass periods. That said, students who did get passes in discounted programs tended to use their passes more than those in free programs as discussed further below. In Oakland and San Leandro, participation grew throughout the school year.

Figure 4-1 Year One Pilot Program Participation by Program Model and School

Program Model	School District	Number of Students Eligible	Number of Passes									Total/ Average Number of Passes ¹⁰	Average Annual Participation Rate
			AC Transit*		Union City Transit*				LAVTA/ Wheels*				
			S1	S2	Q1	Q2	Q3	Q4	T1	T2	T3		
Free + Universal	Oakland USD	1,843	1,670	1,823	--	--	--	--	--	--	--	1,823	99%
	Castlemont High	834	737	818	--	--	--	--	--	--	--	818	98%
	Fremont High	746	696	744	--	--	--	--	--	--	--	744	100%
	Frick Impact Academy	263	237	261	--	--	--	--	--	--	--	261	99%
Free + Limited Grades	San Leandro USD	1,614	813	821	--	--	--	--	--	--	--	821	51%
	San Leandro High	1,291	705	699	--	--	--	--	--	--	--	699	54%
	John Muir Middle	323	108	122	--	--	--	--	--	--	--	122	38%
Discount + Limited Grades	New Haven USD	2,270	151	98	100	81	76	51	--	--	--	ACT: 125 UCT: 77	9%
	James Logan High	1,870	145	94	99	81	76	51	--	--	--	ACT: 120 UCT: 77	10%
	Cesar Chavez Middle	400	6	4	1	0	0	0	--	--	--	ACT: 5 UCT: 1	2%
Discount + Means-Tested	Livermore Valley JUSD	2,441	--	--	--	--	--	--	103	91	51	82	3%
	Livermore High	1,805	--	--	--	--	--	--	47	47	23	39	2%
	East Avenue Middle	636	--	--	--	--	--	--	56	44	28	43	7%
Total/Average of All Participating Schools		8,168	2,742		77				82			2,928	36%

¹⁰ In Districts with free passes, the total number of passes is shown. In districts with discounted passes, the average number of passes is shown because the program was set up in "periods" and students could opt in/out for each period. Period lengths were established to balance the cost of passes for students with the administrative burden of collecting funds; because costs varied by operator, pass periods also varied by operator. The periods for each transit operator were as follows: AC Transit = six-month "semesters" (S), Union City = three-month quarters (Q), LAVTA/Wheels = four-month trimesters (T).

Transit Pass Usage

As shown above, not all eligible students chose to participate in the STPP. Similarly, of those who participated, not all of them used their pass, and among those who used the pass, the frequency of use varied. As discussed in Chapter 3, there are several different data sources that give insight into how STPP passes were used; some sources were only available for AC Transit passes (i.e., Clipper data) during Year One, while others were available for all pass types (both flash passes and Clipper cards). Some overarching trends are as follows:

- In general, STPP participants rode transit regularly, but did not appear to be taking the bus to and from school every day.
- Oakland USD: Most participants used the pass (on average, 64% of OUSD participants used their pass in any given month). Those who used their pass used it frequently (56% used their pass more than 20 times per month).
- San Leandro USD: Participants used their passes the least compared to other programs, with SLUSD participants having both the lowest usage on any given month (48% on average) and lowest frequency of use (only 29% used their pass more than 20 times per month).
- New Haven USD: Fewer students opted to participate and purchase a pass compared to other programs. However, nearly all STPP participants used their pass each month; Clipper data showed that an average of 87% of participants with an AC Transit pass used it in any given month, and participants holding Union City Transit passes took an average of 21 and 14 trips per month, respectively.
- Livermore Valley JUSD: The lowest number of students opted to participate compared to other programs, but these participants were also more frequent users, riding transit an average of 26 times per month per participant.

For participants with AC Transit passes, the share of participants who used their pass at least once each month was higher for the discounted programs than for the free pass programs; survey responses suggest that the share of participants who used their pass increased throughout the year.

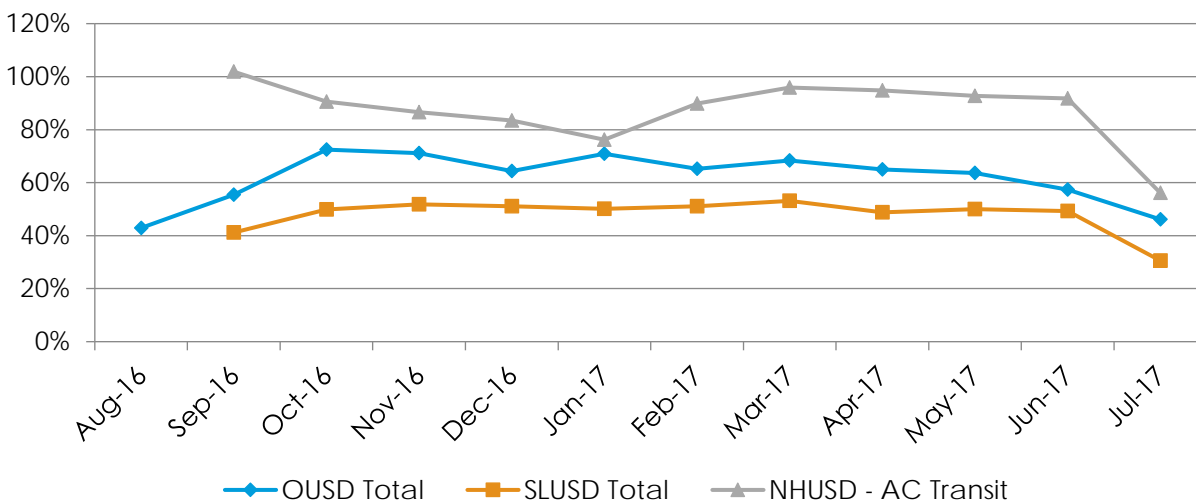
Figure 4-2 illustrates the share of participants with AC Transit passes who used their passes at least once during each month of the year.¹¹ Approximately 80-100% of participants in the discounted program in NHUSD used their pass at least once each month, as would be expected given that they paid for the pass. An average of 64% of OUSD students and 48% of SLUSD students used their passes in any given month. Usage declined somewhat in the discounted program over the course of the first pass period, likely because some students who tried the STPP at the beginning of the year subsequently stopped riding and then did not purchase a pass in subsequent pass periods (as

¹¹ For Year One, all findings derived from Clipper data pertain to AC Transit only, which covers all of the participants in Oakland USD and San Leandro USD, and a sub-set of participants in New Haven USD, and no participants in Livermore Valley JUSD. Both Union City Transit and LAVTA/Wheels used a flash-pass for Year One, so comparable data based on individual passes used in a given month is not available for participants in Livermore Valley JUSD and participants' Union City Transit activity in New Haven USD. During Year Two, all three transit operators will use Clipper, so more comprehensive data will be available in the next evaluation report.

illustrated in the declining participation levels illustrated in Figure 4-1). Those who did purchase passes in later periods, however, used them more than any other participants.

Although data on the number of passes used each month is not available for LAVTA or Union City Transit, the student surveys assessed participants' use of their transit pass in all four programs. The survey data indicates that the share of participants who had not yet used their pass declined significantly between fall and spring surveys, from 65% of participants who had not yet used their transit pass in the fall to 11-12% of participants in the spring.¹²

Figure 4-2 Share of Participants Who Used Their AC Transit Pass Each Month¹³



Frequency of Use

Of those participants who used their STPP AC Transit pass, there was significant variation in how often they used the pass; most rode transit regularly, but not to and from school every day.

Clipper data, which is currently available only for AC Transit passes, provides insight into how often participants are riding transit. Each month, participants who used their pass are grouped into one of four categories: 1-10 boardings per month, 11-20 boardings per month, 21-40 boardings per month, or more than 40 boardings per month. There were 20 to 23 weekdays during the months of the 2016-17 school year, so any participant with 40 or more boardings per month could be riding transit to and from school virtually every day. This level of transit use could also occur for other reasons; students may ride less frequently but have to transfer between buses, and thus have more tags per trip. Students may take more than two trips on the days they ride transit ("trip-chaining," e.g., if they go to an afterschool activity between school and home), or students may regularly use transit on weekends in addition to their travel to and from school.

¹² The fall survey result was highly influenced by the fact that more than 50% of all participant responses came from students in Oakland USD.

¹³ OUSD was the only program with activated Clipper cards during August 2016.

Figure 4-3 shows the number of participants with AC Transit passes in each frequency category by month by program for the eleven full months of Year One.¹⁴ Countywide, there is relatively even distribution across all categories of frequency; however, distribution varies by program.

Whereas some participants did not use their pass at all (Figure 4-2), of those who did, OUSD participants showed the most frequent usage with more than half of participants using their pass more than twenty times per month; less than a third of SLUSD and NHUSD participants used their pass more than twenty times in a typical month.

Figure 4-3 Average Monthly Frequency of AC Transit Pass Usage by Program Area

	40 or More Times Per Month	21 to 40 Times Per Month	11 to 20 Times Per Month	1 to 10 Times Per Month	Total
OUSD	30%	26%	17%	27%	100%
SLUSD	10%	19%	22%	49%	100%
NHUSD	5%	25%	28%	42%	100%
All schools	23%	24%	19%	34%	100%

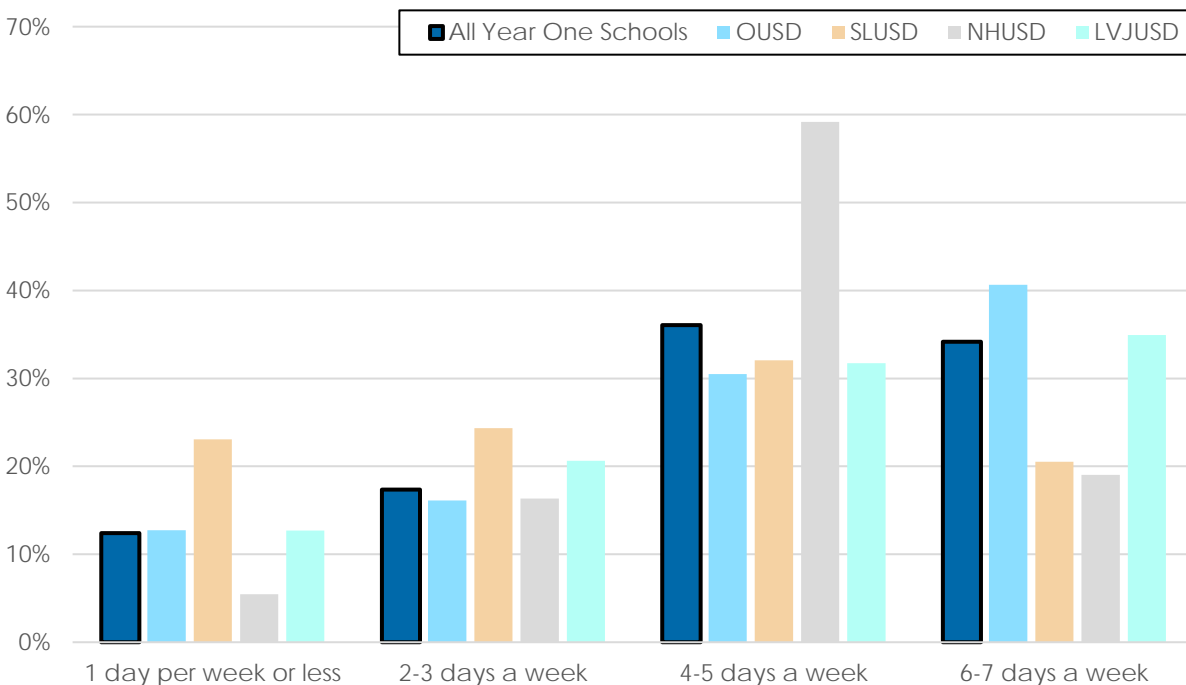
Self-reported survey data also indicated that participants varied in how often they used their pass; of those who used their pass, the majority said they used it four or more days per week.

The student survey conducted in fall 2016 asked participants to report how often they ride transit each week. Of the respondents who had used their pass at the time of the survey, over a third used it six to seven days per week (34%), and 70% used the pass four or more days per week. The frequency breakdown by pilot program is depicted in Figure 4-4. Combined with other data points, this analysis supports the finding that a fair number of students are not necessarily using transit to get to and from school every day, but may be using it for just one direction (more likely afternoon departure). Overall, trip making varies widely from student to student depending on their needs and transit service available.

Over two thirds of LAVTA participants who have used their pass reported using it at least four days per week. At the time the survey was administered, nearly 42% of participants reported that they had not yet used their pass.

¹⁴ As only OUSD students began participation in the STPP in the middle of August, that month's partial data distorts the average and puts OUSD on a different footing than its peers. This data presents an average of September through July data to provide a more accurate comparison among the applicable programs.

Figure 4-4 Reported Frequency Among Participants Who Reported Using Their STPP Pass (Number of Days Per Week Using The STPP Pass) by Program, Fall 2016



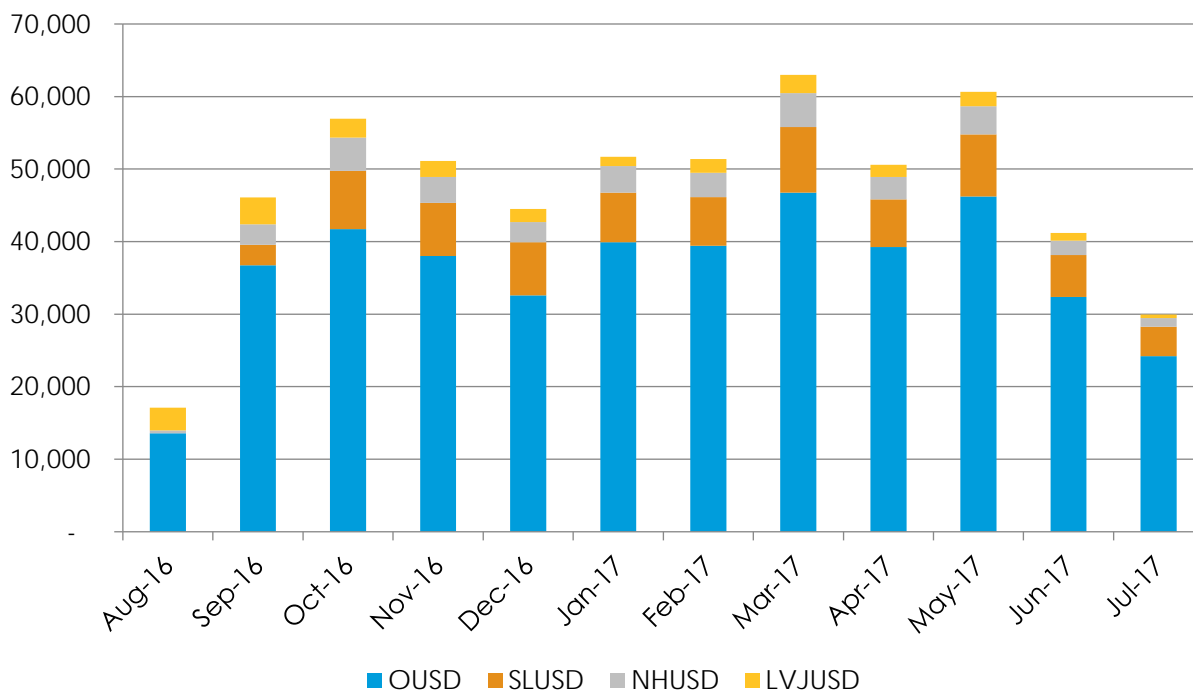
Transit Ridership

- ☀ **Year One of the STPP facilitated over half a million transit boardings. On average, students in the program made approximately 50,000 transit boardings per month.**

Monthly values ranging from a low of about 30,000 in July to a high of about 63,000 in March for a total of 564,000 transit boardings between August 2016 and July 2017.¹⁵

The total monthly boardings by program are shown in Figure 4-5 and the breakdown of boardings by transit operator are shown in Figure 4-6. During Year One, more than 70% of transit boardings each month were by students at the Oakland USD schools on AC Transit. This is to be expected due to the much higher number of participants at those schools. Figure 4-5 also shows that passes are used more during the school year; the lowest ridership was in the summer months of August, June, and July. Winter holidays in December and spring break in April also contributed to relatively lower levels of total boardings in those months.

¹⁵ Ridership data reported by transit operators reflects the total number of transit boardings, also known as “unlinked trips.” If a student must transfer from one bus to another and uses their STPP pass for both legs of their journey, that end-to-end trip would be counted as two boardings.

Figure 4-5 Total Number of Transit Boardings Each Month, by Program¹⁶

On average, there were 17 monthly boardings per participant from September to July, with significant variations by operator and program. Program pilots with paid passes were higher than those with free passes.

Transit agency data shows that LVJUSD had the highest number of monthly boardings per participant, with an average of 26 monthly boardings, followed by NHUSD participants with Union City Transit passes, with an average of 21 monthly boardings. Among the free programs, boardings per participant varied widely, with an average of 20 in OUSD and 8 in SLUSD; New Haven USD's participants with AC Transit passes made about 14 boardings per month.¹⁷ More generally, variations in transit trip-making between the different programs could be influenced by a variety of factors that are unrelated to program design or student engagement, including the available transit routes and schedules in different parts of Alameda County.

¹⁶ OUSD was the only program with activated Clipper cards during August 2016. LVJUSD boardings in August include the two-week "Try Transit" promotional period that coincided with the beginning of the school year.

¹⁷ It should be noted that all of these figures are presented as boardings per the total number program participants in each program, including those participants who did not use their pass at all. As an example, Figure 4-2 shows that about half of SLUSD participants used their pass in any given month, so the computed value of average boardings per participant is lower than the average number of boardings per participant that actually used their pass in that month.

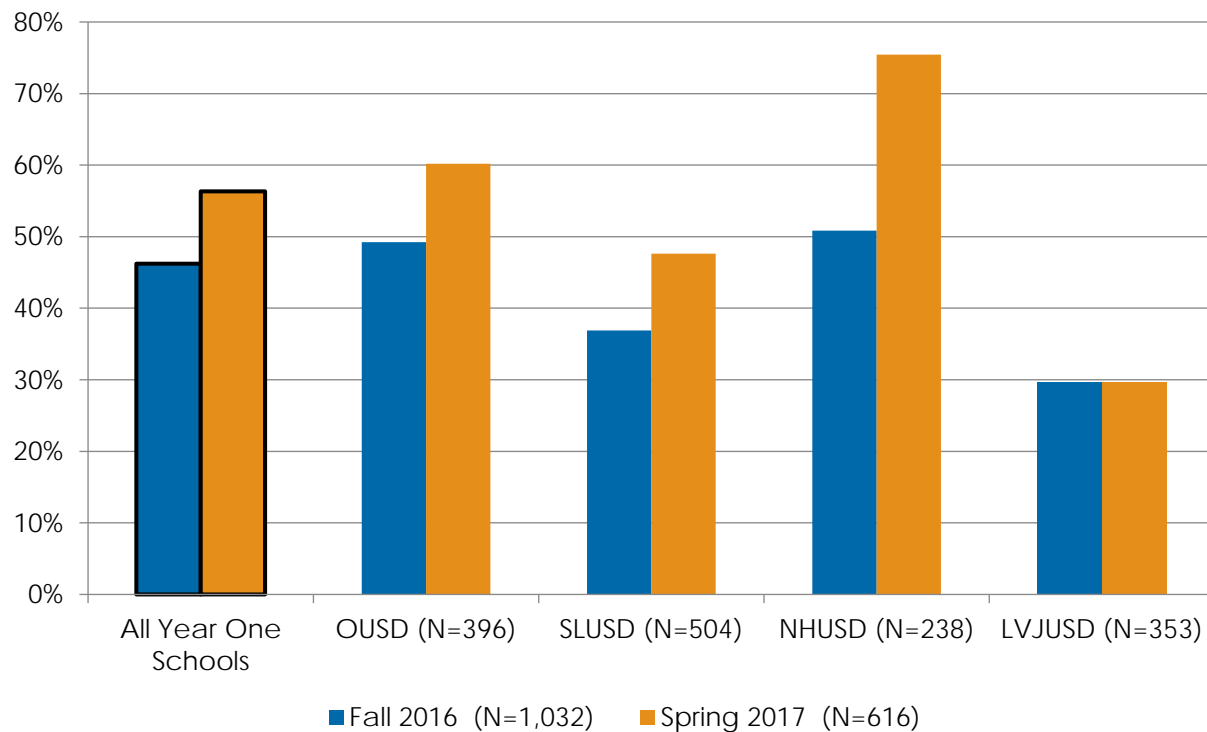
Figure 4-6 Boardings by Transit Operator

	Total Transit Boardings by Participants (Aug-July)	Average Monthly Boardings (Sept-July)	Average Monthly Boardings per Participant (Sept-July)
OUSD (AC Transit)	430,765	37,927	20
SLUSD (AC Transit)	73,037	6,640	8
NHUSD	36,079	3,241	17
<i>AC Transit</i>	18,034	1,639	14
<i>Union City Transit</i>	18,045	1,602	21
LVJUSD (LAVTA/Wheels)	24,254	1,922	26
All Participating Schools	564,135	49,730	17

 **Students with passes reported riding transit more than they did before the STPP.**

Students who responded to the fall and spring surveys were asked to indicate how their transit ridership has changed since acquiring the transit pass. In fall 2016, 1,032 program participants responded to this question. More than 46% of these students reported riding the bus more often since they received the pass. Values ranged from a low of 30% of participants from the Livermore Valley JUSD (Discount + Means-Tested) to 51% of students from the New Haven USD (Discount + Limited Grades) reporting greater use of transit. In the spring 2017 survey, 616 program participants responded, with higher numbers of students reporting greater use of transit. Overall, 56% of participants reported more transit ridership, with Livermore Valley JUSD again reporting the lowest share at 30% of participants and New Haven USD reporting the highest share, at more than 75% of participants reporting more transit ridership. In both of the other two programs, more participants in the spring survey indicated they are riding transit more since receiving the pass (compared to the fall survey). These results are depicted below in Figure 4-7.

Figure 4-7 Share of Participants Who Report Riding Transit More Often Since Getting the Pass



When participants were asked why they do not use their passes more often, the two most common responses related to bus travel itself, rather than issues with the pass program.

The fall 2016 survey included a question for all participants that was designed to surface any issues that may have been hindering program usage. Respondents were allowed to select multiple responses from a set of issues related to difficulties obtaining a pass (e.g., not picked up, lost, etc.) and a set of issues related to concerns about using the bus (e.g., do not like riding, do not feel safe, etc.) Across all four programs, the top responses from participants were:

- I prefer to travel another way besides bus (14%)
- The bus does not go where I need to go (10%)
- I lost my pass (9%)

Trip Purpose and Afterschool Activity Participation

 **Passes are primarily used to get students to and from school.**

Both student surveys asked respondents to indicate all of the different trip purposes for which they used their pass.¹⁸ In the fall 2016 survey the top three trip purposes were:

- For school travel (69% overall; 58%-78% depending on program model)

¹⁸ The question on trip purpose was worded slightly differently in each of the two surveys. The fall survey having more distinct options to choose from, some of which were collapsed into a smaller set of response options for the Spring survey. Because students were allowed to mark all responses that applied to them, the fall survey tallies cannot be merged in order to directly compare the fall and spring results.

- To spend time with friends (22% overall; 15% to 24% depending on program model).
- Travel to and from afterschool activities (21% overall; 18% to 30% depending on program model)

Participants also reported using the pass to visit family (17%) and to travel to and from educational programs such as tutoring (15%).

Participants in all four program models reported higher rates of usage for school-related travel in the spring 2017 survey. Top trip purposes in spring 2017 survey were:

- For school travel (71% overall; 66%-91% depending on the program)
- To travel to and from all types of afterschool activities (34% overall; 27% to 56% depending on program model). This response encompassed activities that were treated separately in the fall survey, including educational lessons, sports, and extra-curricular activities.
- To visit friends or family (30% overall; 11% to 34% depending on program model).

On weekdays, students use their transit passes primarily for travel in the hours immediately before and after school. Weekend travel is spread through most of the daytime hours.

The two figures below illustrate weekday and weekend AC Transit ridership by time of day for the month of March 2017, for each of the three programs with Clipper card data. This supports the finding that the majority of participants are using their transit pass for school-related travel. The pattern visible in the two charts below was consistent throughout all of the months of the school year.

Figure 4-8 Share of Weekday Transit Boardings by Hour of the Day, By Program [AC Transit only, March 2017]

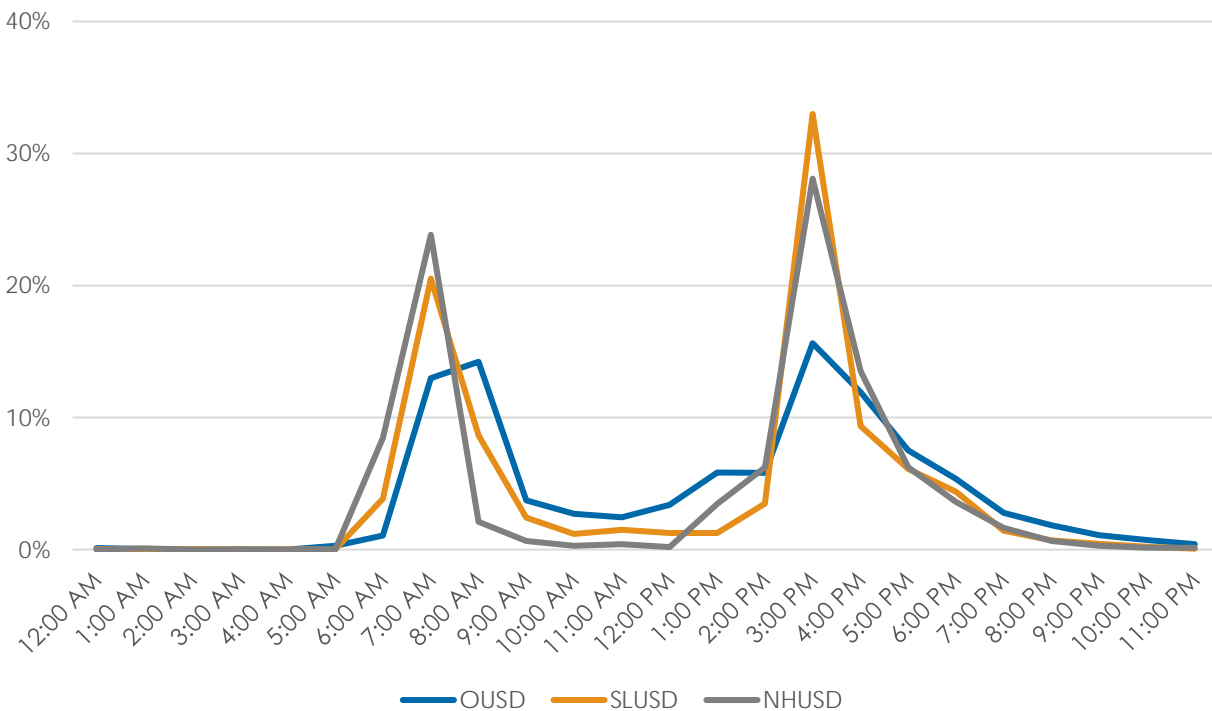
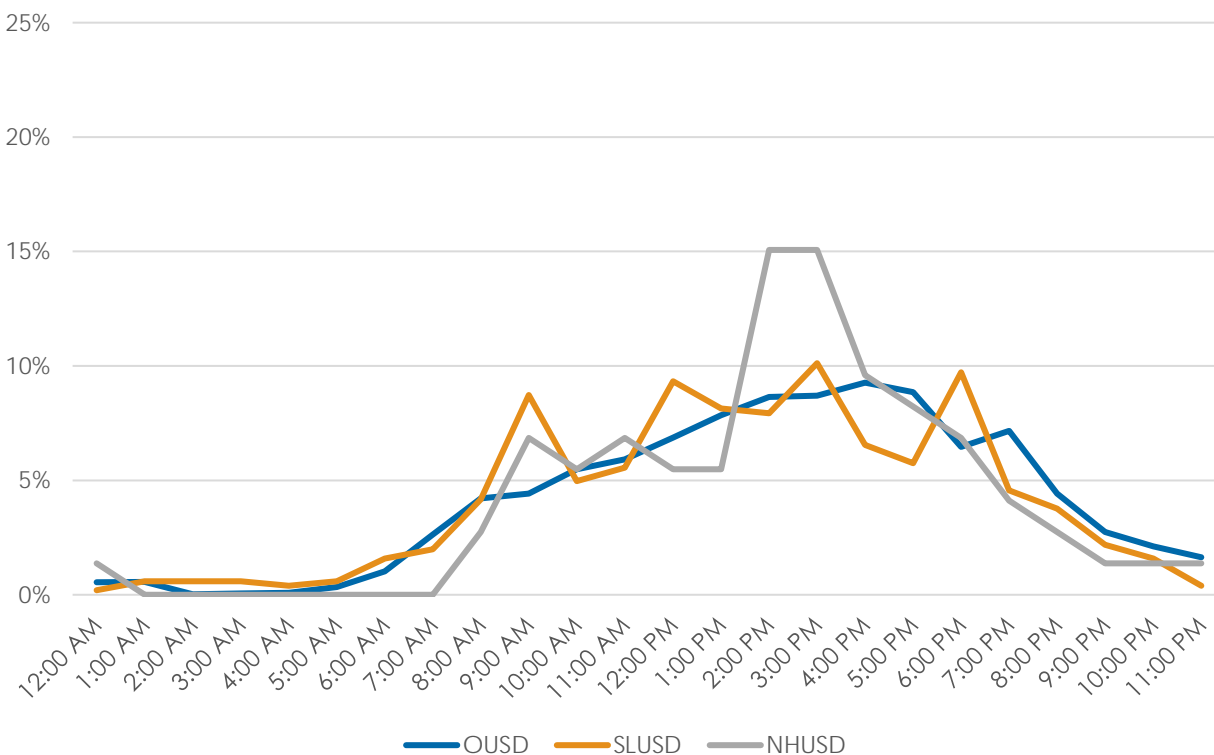


Figure 4-9 Share Of Weekend Transit Boardings in Each Hour of the Day, By Program
[AC Transit only, March 2017]



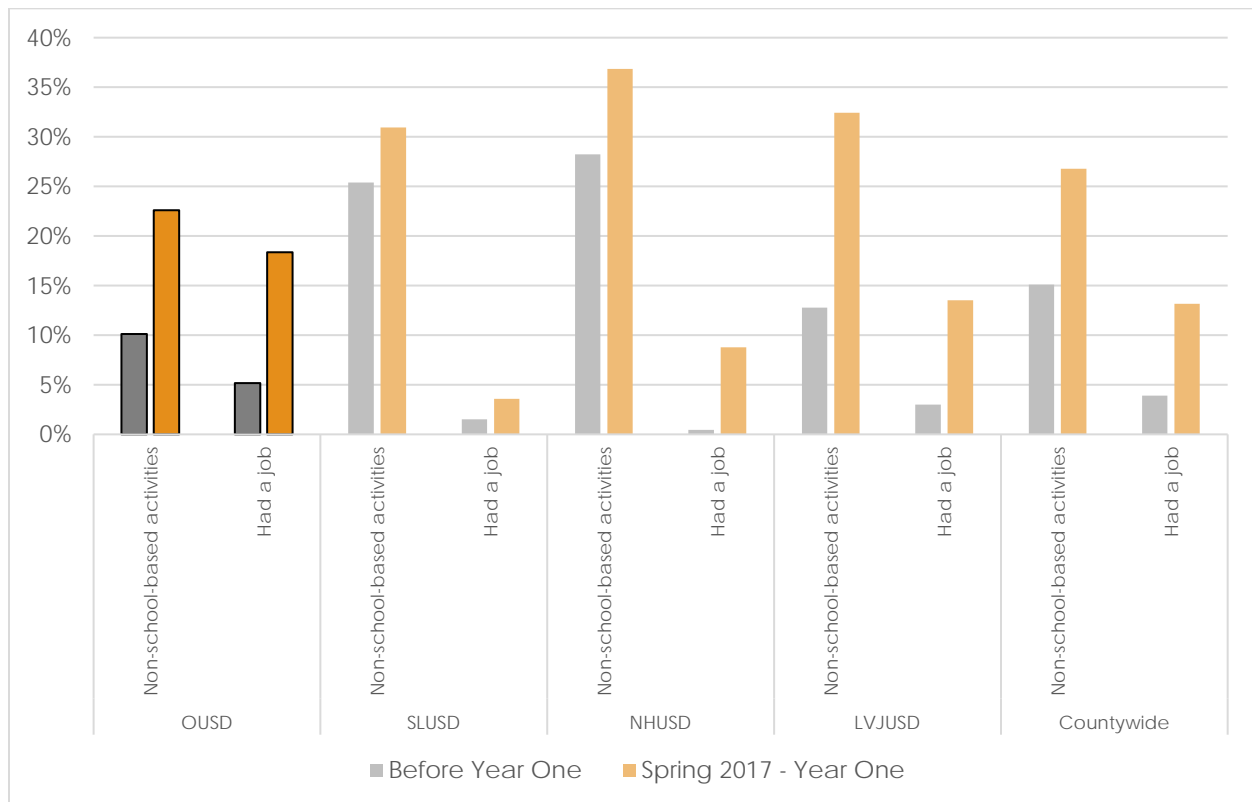
 **Student transit passes allowed students to participate in afterschool activities.**

Across all Year One schools, involvement in non-school-related afterschool activities and afterschool jobs increased by 77% and 238% respectively (Figure 4-10). Prior to Year One, the level of participation in afterschool activities was generally the same for both pilot program participants and non-participants within each program model, implying this increase is not due to an innate bias by STPP participants to be more involved in programs in general.¹⁹ This finding implies that possessing an affordable transit pass enabled more STPP participants to be involved in activities and jobs outside of the school. As far as afterschool activities located at school, participation did not change consistently for any program model.

“I was able to get a job because I have a Clipper card and the boss knows transportation will not be a problem now.”
Castlemont High School Student (OUSD)

¹⁹ When registering during Year One of the STPP, students were asked whether they participated in any afterschool activities the prior year before the pilot program had been implemented.

Figure 4-10 Percentage of Pilot Program Participants Involved in Non-School-Related Afterschool Activities and Jobs



Through focus groups and other informal feedback mechanisms, school staff and student participants reported that they were able to use the transit pass to reach new areas of their community and the resources and opportunities available there. For example, a staff member at Castlemont HS described how the transit pass makes it easier to find internships for students, because free transit makes it possible to look for internships in areas of Oakland that were previously out of reach without transportation. In another case, a participating school is now researching ways students can use the free bus pass to increase their educational development, for example by encouraging them to take advantage of the computers and other resources available at public libraries.

*"I ride the bus after school and on weekends exploring different places I've never seen before."
Castlemont High School Student
(OUSD)*

*"The Clipper card is so helpful! It helps me get to places easier and it really helps me be able to go downtown and explore places more. I've benefited from free public transit. I recognize more places and stops in San Leandro because of the frequent trips I take. Now I don't have to walk home. My house is 7 miles away walking distance, it would take forever."
John Muir Middle School Student
(SLUSD)*

Mode Share

Between the fall and the spring surveys, transit mode share among program participants increased in both the morning and afternoon travel periods.

Although no reliable consistent before data on mode share is available, transit mode shares across all Year One schools increased for travel both to and from school between the fall and spring surveys as shown in the middle pairs of pie charts in the two figures on the following page. In terms of arrivals to school in the morning, 32% of participants used transit in the fall, compared to 45% of participants in the spring. For departures from school in the afternoon, transit mode share among participants increased from 49% in the fall to 55% in the spring.

"I love using the bus pass to go to school. Now my parents don't have to be late to work just so I can go to school. It has been very convenient to use the bus. I would be walking to school if it weren't for the Clipper card."

*John Muir Middle School Student
(SLUSD)*

Program participants use transit more than their eligible non-participating peers.

In each of the two figures below, the middle and right pie charts show the mode share differences between students who have a pass and those who do not. Transit mode share is significantly higher for participants than for non-participants. It should be noted that there are several reasons this might be true. If a student has signed up for a transit pass, and particularly if they have had to pay for it, they are more likely to choose transit for trips where they previously would have selected another mode. The availability of an unlimited transit pass might also make participants more likely to take transit for short trips where they previously would have walked or biked, as indicated by the fact that the walk mode share is slightly higher among non-participants. Finally, there may be some self-selection bias as existing transit riders or those for whom transit works well for their daily trips are more likely to sign up for the STPP.

Across all survey respondents during Year One, the share of students who take transit or walk in the afternoon is higher than the corresponding mode shares for morning arrivals.

In both the fall 2016 and spring 2017 surveys, more than half of respondents said they get a car ride to travel to school, but less than half are picked up when leaving school. As might be expected, mode shares are relatively steady for biking and driving oneself, because a student takes their own car or bike back home at the end of the day. The students who change modes between arrival and departure tend to shift to transit and walking, with more significant increases for transit than for walking.

The shift to transit for afternoon departures is even more pronounced among program participants who have access to a transit pass; they ride transit significantly more departing school in the afternoon than when they arrive in the morning. For eligible non-participants, there is still a decrease in auto modes and an increase in transit and walking between morning arrivals and afternoon departures. However, a larger share of students shifts to walking as opposed to shifting to transit. The results across all Year One schools for the fall 2016 survey are portrayed in Figure 4-11, and those for the spring 2017 survey are portrayed in Figure 4-12.

Figure 4-11 Fall 2016 Arrival and Departure Mode Share for all Year One Schools, Grouped by Participant Status

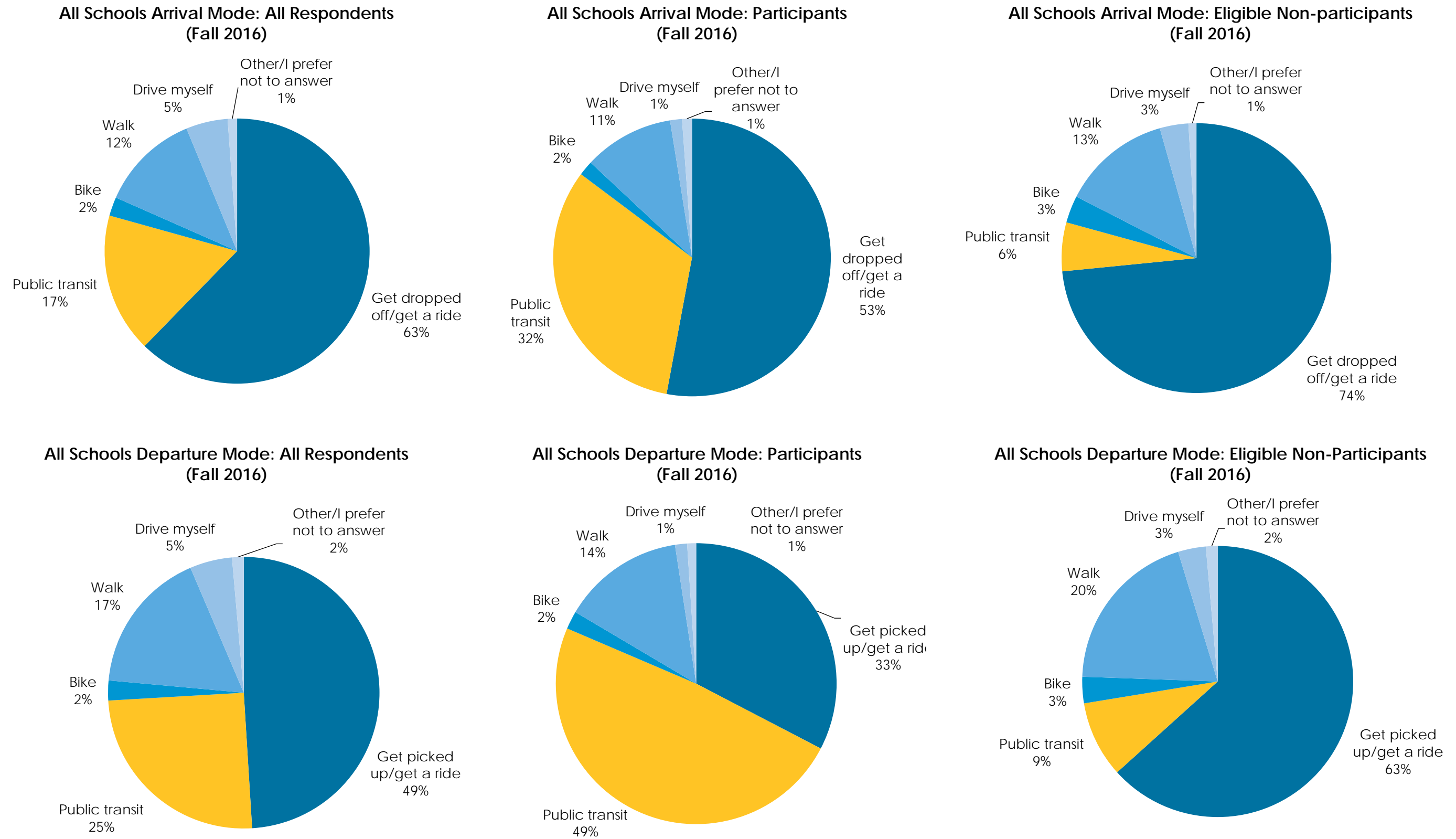
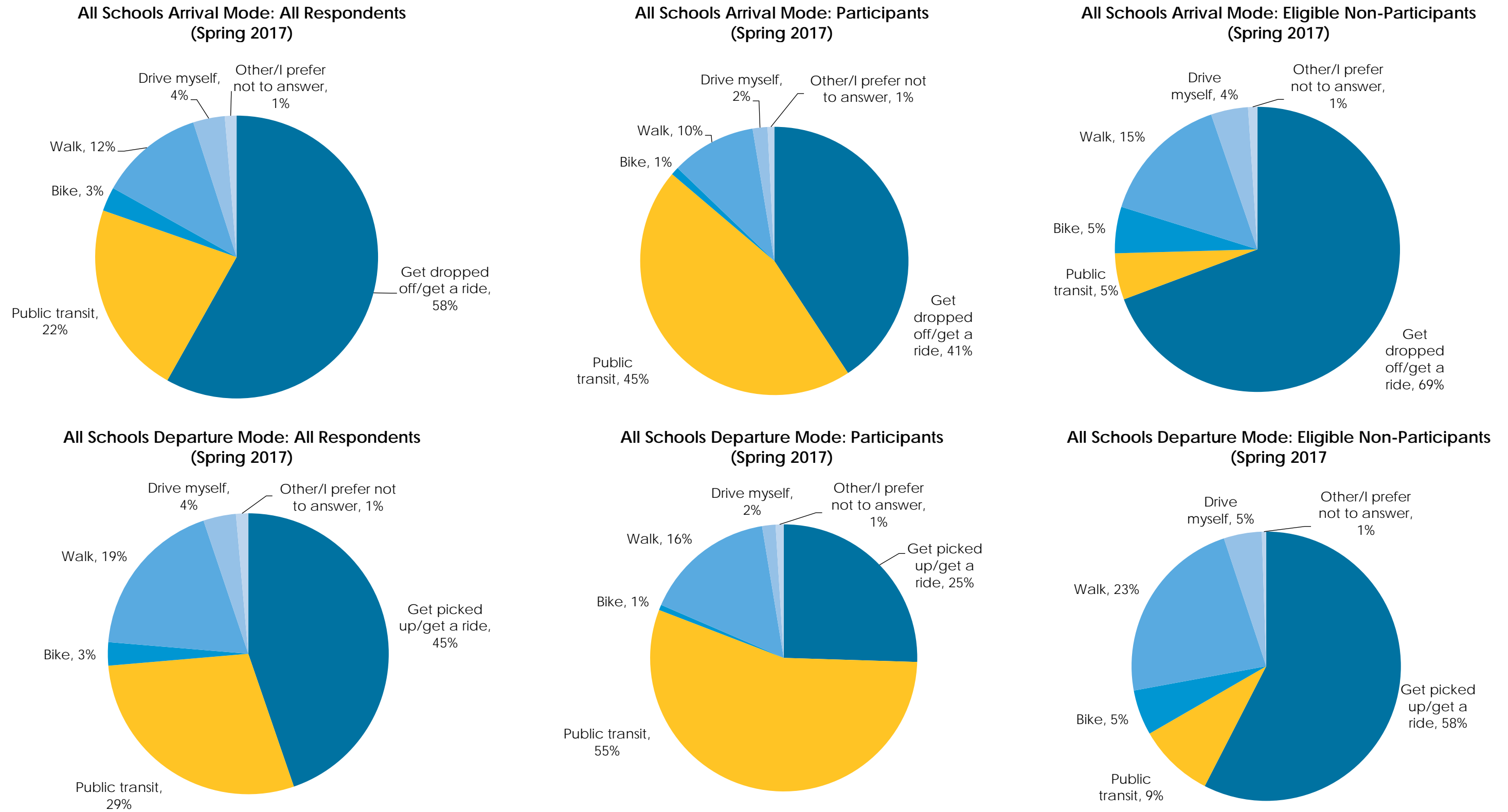


Figure 4-12 Spring 2017 Arrival and Departure Mode Share for all Year One Schools, Grouped by Participant Status

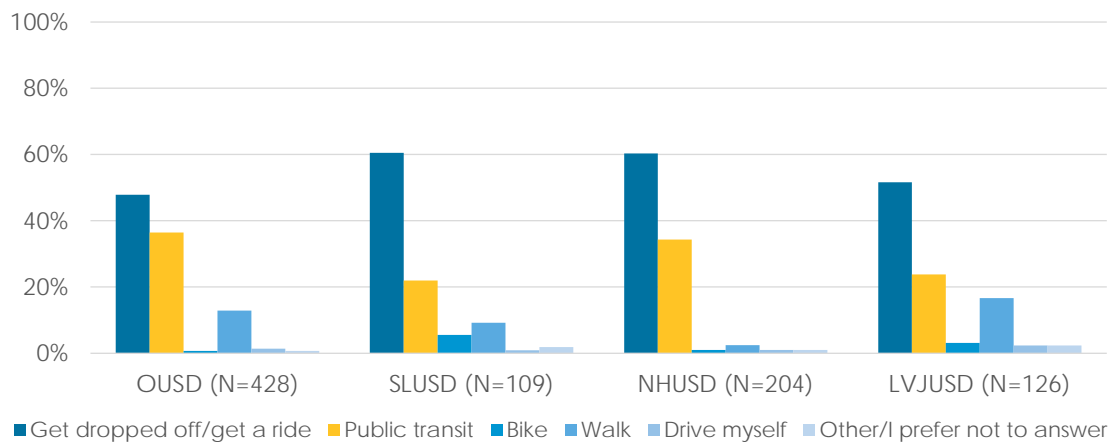


Transit mode share increased between the fall and spring surveys across three of four programs.

The mode share findings reported above prove true across all programs except one. The one exception is San Leandro USD where afternoon transit mode share declined very slightly between the fall and spring, with an increase seen in walking in that program. Shown in the spring survey, participants' transit mode share for morning arrivals was at least 30% in every program; Oakland USD (Free + Universal) had the highest transit share at 54%. The spring survey showed that transit mode share for afternoon departures was at or above 40% in every program; New Haven USD (Discounted + Limited Grades) participants had the highest level of transit mode share at 77%. These results are depicted below. Figure 4-13 compares arrival mode shares between the fall and spring surveys and Figure 4-14 compares departure mode shares between the fall and spring surveys.

Figure 4-13 Change in Participants' Arrival Mode, grouped by Program

Participants' Arrival Mode by Program, Fall 2016 Survey



Participants' Arrival Mode by Program, Spring 2017 Survey

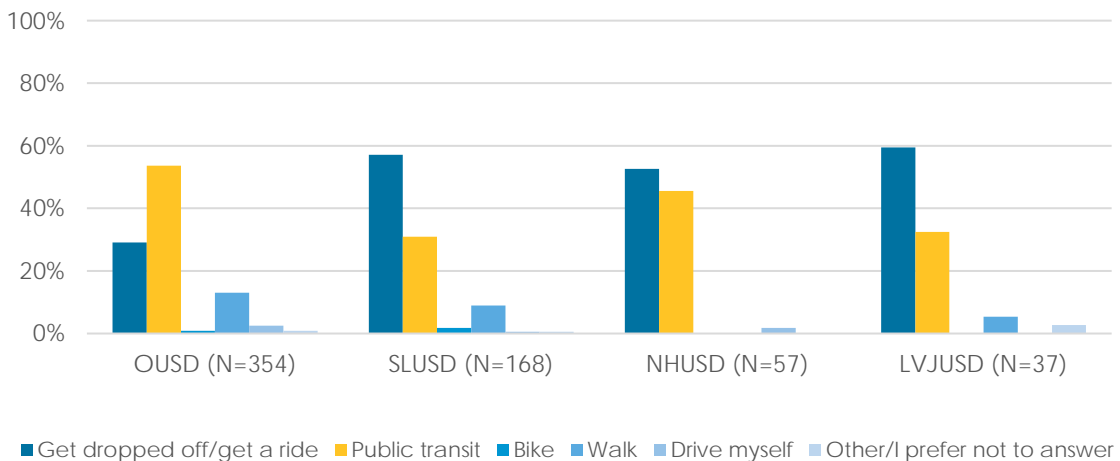
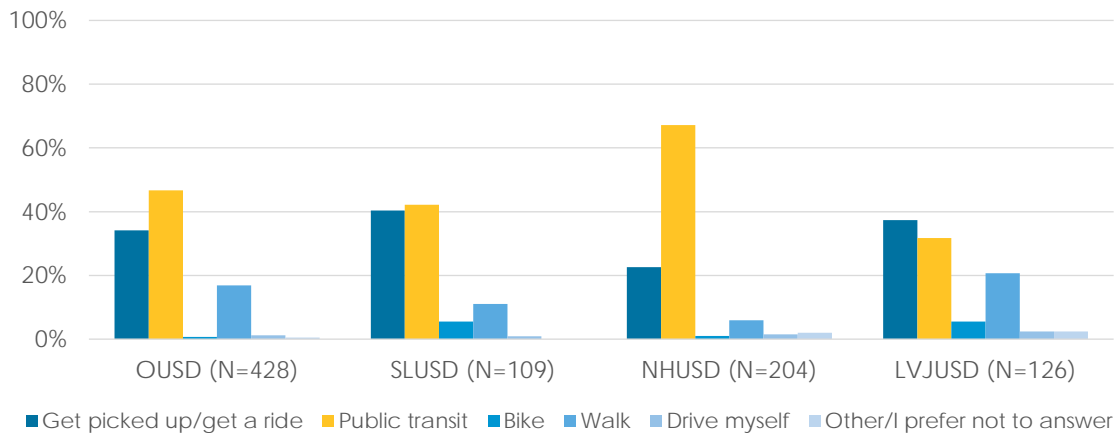
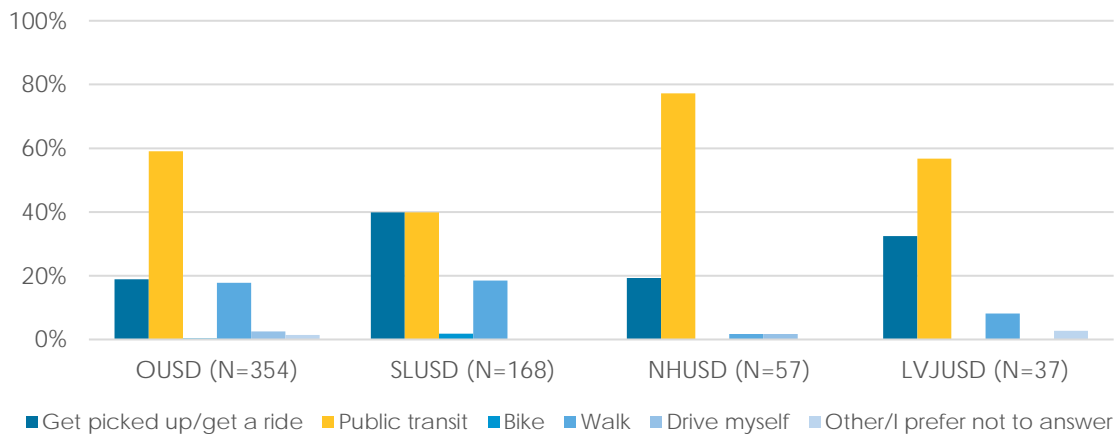


Figure 4-14 Change in Participants' Departure Mode, Grouped by Program**Participants' Departure Mode by Program, Fall 2016 Survey****Participants' Departure Mode by Program, Spring 2017 Survey**

B. Student Perceptions of Transit

General Perceptions

Program participants had strong rates of positive association and low rates of negative association with transit than the average across all survey respondents.

More than 80% of program participants reported a positive association with bus travel overall, with at least 70% of respondents in each program model affirming they felt safe on the bus and that transit meets their needs (spring 2017 student survey).²⁰ At least half of respondents in each program model said they feel safe on transit and that transit meets their needs, with lower levels of satisfaction among students in the San Leandro USD and Livermore Valley JUSD, and

higher satisfaction among students in the Oakland USD and New Haven USD. Globally and within each program model, fewer than 10% of program participants reported feelings of embarrassment about riding the bus; with lowest levels of discomfort amongst high school participants (less than 4%). Globally and within each program, less than 20% of program participants reported that it is intimidating to use the bus; again high school participants displayed more confidence than middle school students (23% of middle school participants reported feeling intimidated compared to only 13% of high school participants).

Students who were eligible but chose not to participate had somewhat less positive perceptions of bus travel than the overall average. Still, a sizable percentage felt that the bus was safe and could meet their travel needs.

Overall, eligible non-participants also had positive associations about riding the bus: 72% of reported they feel safe on the bus and 60% reported that the bus meets their travel needs; similar to above, there are higher positive associations amongst high school students than middle school students.

"The Clipper card helps me get place to place without trouble. The bus is always so comfortable and warm around this time of year."

*John Muir Middle School Student
(SLUSD)*

"I don't really have to wait and wonder who is driving me home. There are other people there that also get on the bus and ride with me so it's fun."

*John Muir Middle School Student
(SLUSD)*

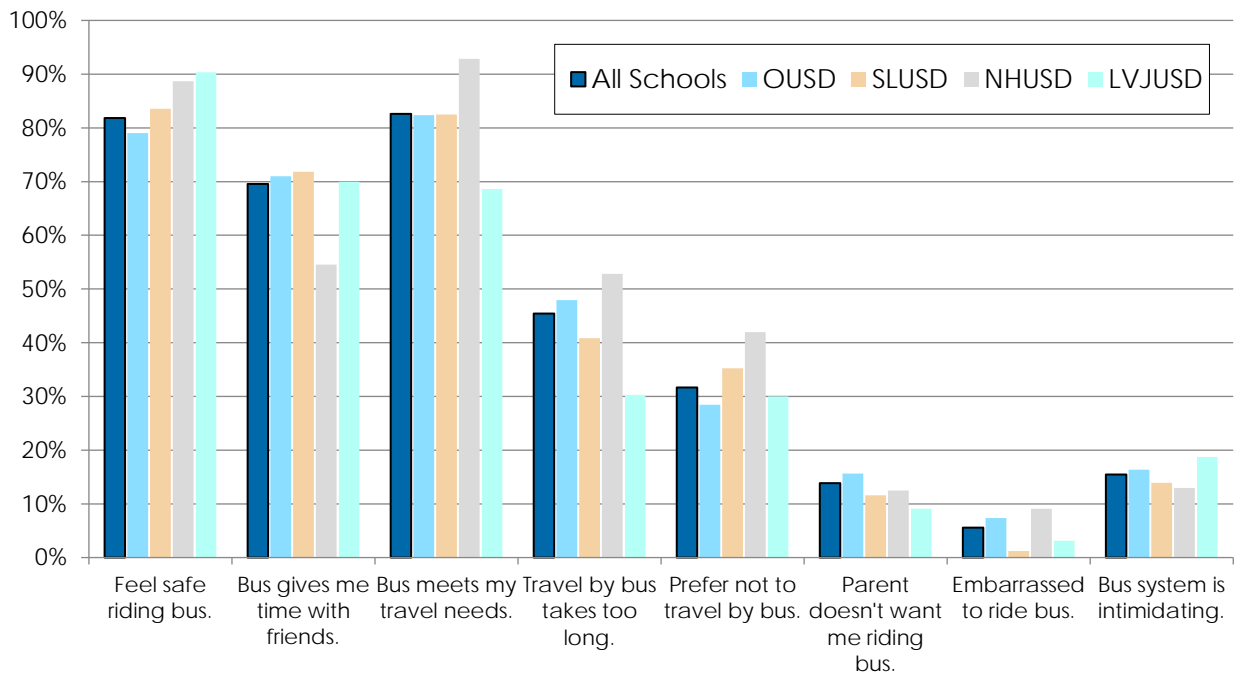
²⁰ Perceptions of transit described here are based on the share of survey respondents who responded "TRUE" to eight different declarative statements about riding transit, as a percentage of the total number who responded either "TRUE" or "FALSE" to each statement. Students could opt out of responding to individual statements, so the response rate varies for each of the perceptions measured.

There are several possible indicators of why these eligible students opted not to participate:

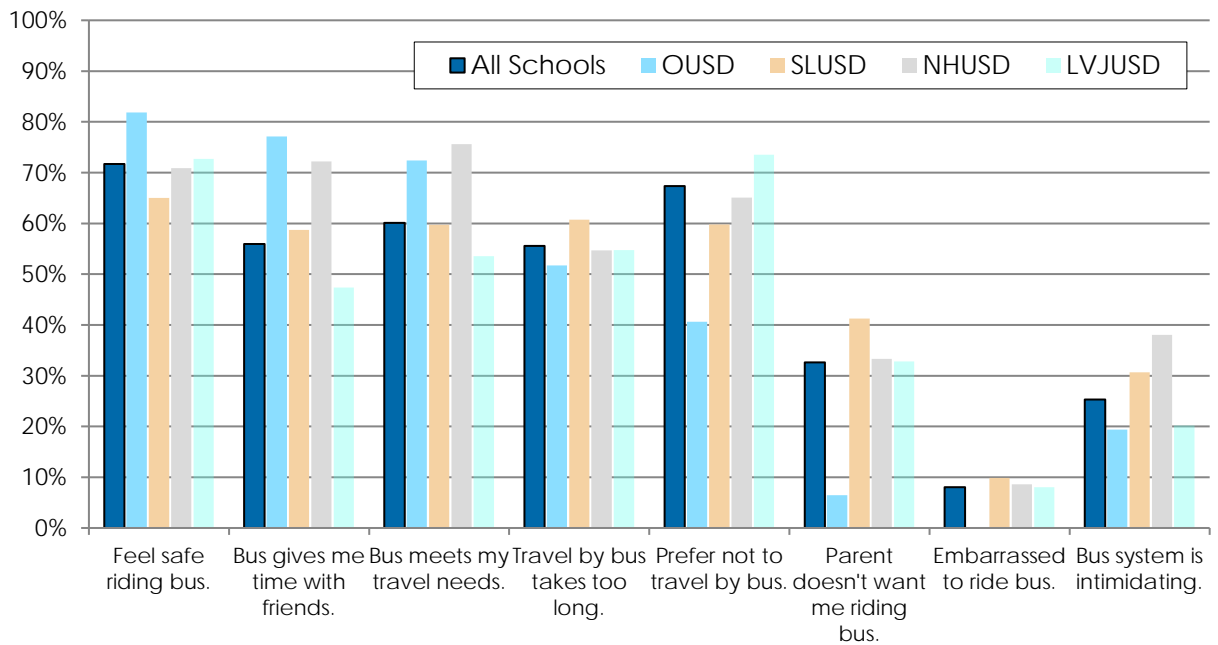
- 67% of eligible non-participants reported that they preferred not to travel by bus. This was even more pronounced amongst middle school students (three quarters of all eligible middle-school non-participants)
- 56% of eligible non-participants felt that travel by bus takes too long.
- 33% of eligible non-participants reported that their parent or guardian did not want them to travel by bus. Of the total eligible non-participants that indicated that this statement was true, more than half were from the Livermore Valley JUSD program, and about 20% each in San Leandro USD and New Haven USD.
- 32% of eligible high-school non-participants reported that they found traveling on the bus to be intimidating.

Figure 4-15 Comparative Perceptions of Transit, Grouped by Program (Spring 2017)

Participant Perceptions of Transit, by Program



Non-participant Perceptions of Transit, by Program



Barriers and Concerns

Non-participants were deterred from using transit due to personal preferences as well as a lack of knowledge and awareness of the program itself.

Based on available data from the fall 2016 survey, the three most common barriers to transit use in general cited by non-participants were (1) they do not like riding the bus (35% agree); (2) the bus takes too long (31% agree); and (3) they do not feel safe riding the bus (19% agree). The three most common reasons that non-participants gave for not signing up for the program were (1) preferring to travel by another mode (30% agree); (2) not knowing they could get a pass (18% agree); and (3) not being eligible because of their grade level (12% agree). Excluding ineligible non-participants from the analysis, the most significant barriers to program sign-up were (1) preferring to travel by another mode (34% agree); (2) not knowing they could get a pass (19% agree); and (3) a parent or guardian that did not want them to ride transit (13% agree).

School site administrators identified additional barriers that were not covered in the surveys.


In discount programs, payment can sometimes be a barrier to entry even for students who are interested in the program.

For all programs, the cumbersome process to replace a lost pass can be a big financial hardship.

"My biggest issue has been students who can't afford to pay the \$5 card replacement fee...and while they wait for the card in the mail, they can't pay bus fare for that 2-4 week turnaround window."

*John Muir Middle School Administrator
(SLUSD)*

C. School Attendance

 **The transit pass has had a meaningful impact on attendance.**

Although attendance changes were not observable in school-wide statistics, school site administrators reported that the availability of the pass made a significant difference in attendance patterns at the individual student level. In one notable example, the staff person in charge of attendance at Castlemont High School said that her job is much easier now and attendance is way up. She explained that the biggest reason for absenteeism is lack of transportation to school, and at the end of month, she has always seen higher absenteeism because family money dries up and there are no funds for bus fare. Now, transportation should not be a reason for absenteeism.

"We had truant families who, now that they have the pass, it has improved attendance."

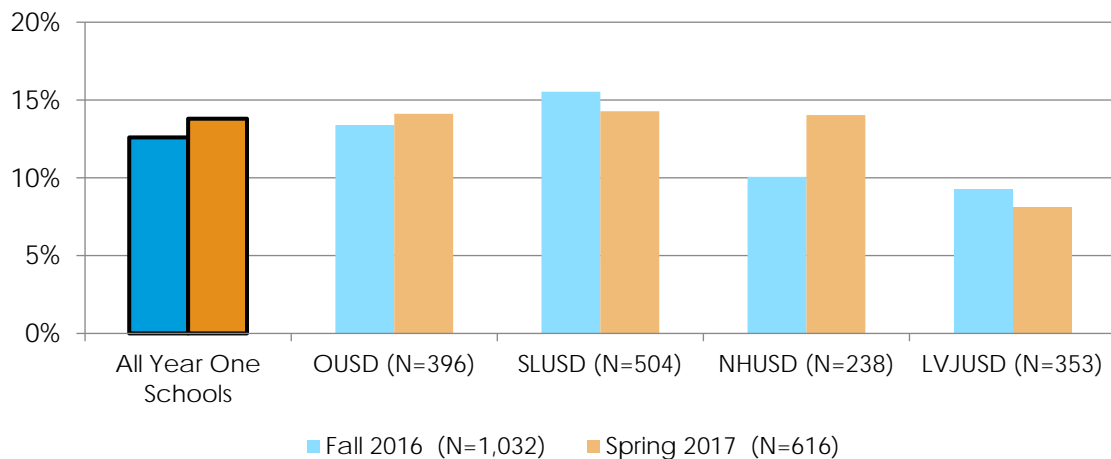
One student in our school was perpetually truant; his family had a lot of issues where they just couldn't get the kids to school on time. He took it upon himself to get the pass, got a parent signature somehow, and now he has straight As."

*John Muir Middle School Administrator
(SLUSD)*

A small but meaningful proportion of participating students report that they miss fewer days of school since receiving the transit pass.

Students who responded to the fall 2016 and spring 2017 surveys were asked to indicate how their attendance patterns have changed since acquiring the transit pass. In the fall, 1,032 program participants responded to this question, and approximately 13% of these students reported missing fewer days of school since they received the pass (9-15% depending on the school). In the spring, 616 program participants responded, with almost 14% reporting improved attendance (8-14% depending on the school). These results are depicted below in Figure 4-16.

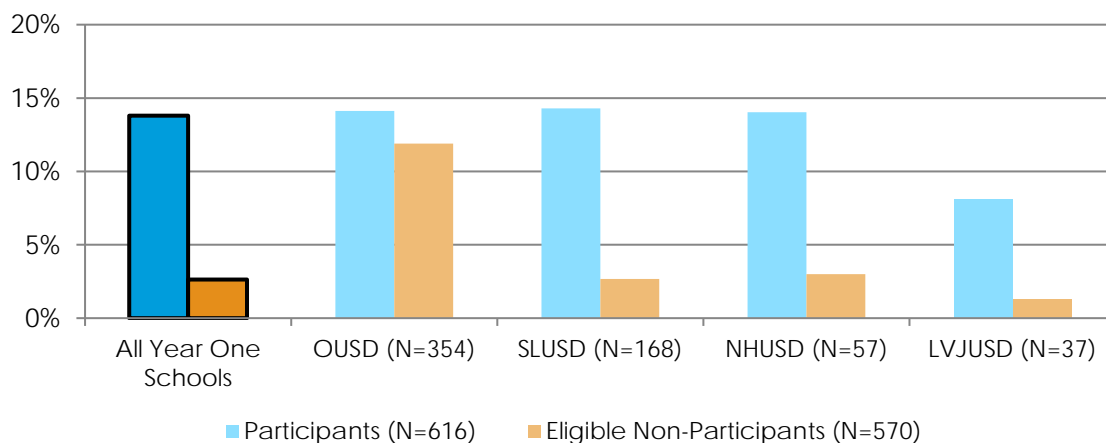
Figure 4-16 Share of Participants Who Report Missing Fewer Days of School Since Receiving the Transit Pass



Students with a transit pass report stronger before-and-after gains in attendance than their peers without the pass.

In the spring survey, STPP participants reported higher rates of increased attendance than eligible non-participants who answered the same question. Specifically, 14% of participants reported improved attendance as compared to only 3% of eligible non-participants who indicated that they were missing fewer school days. At the program level, the share of students who reported attendance improvements is consistently higher among pass-holders than non-participants, in some cases more than five times higher.

Figure 4-17 Share of Respondents Who Report Missing Fewer Days of School Compared to Last Year (Spring 2017 Survey)



There was no clear correlation between Year One of the STPP and school-wide attendance.

Year One data does not indicate statistically significant changes in school-wide or grade-level attendance patterns at pilot schools. Some pilot schools showed some improvements in attendance compared to the baseline year, but there was no clear correlation between attendance gains and program design, grade level, or school level (middle school vs. high school). More importantly, the changes in attendance were generally within the range of typical year-over-year changes in the recent past, prior to the launch of the pilot. The observed changes in attendance cannot be attributed to the existence and availability of the pilot. This initial result is not surprising, because program uptake was at or below 50% at most Year One schools. Attendance changes among the population of STPP participants would be difficult to observe in student-body level statistics.

D. Impact on Students and Families' Lives

Positive Impacts

 **The transit pass made a positive impact on students' well-being.**

Across all schools, about 30% of participants report that having the pass has made their family's life easier; 24% of participants report having better access to their jobs and after-school activities; and 22% of participants feel they have more independence than before the program. At the program level, participants enrolled at schools in the San Leandro USD and New Haven USD (both limited grades programs) reported the highest rates of agreement that the pass had positively impacted their lives on these same three measures.

Participants responding to the spring 2017 survey generally report higher levels of agreement with these same positive impacts.

Across all schools, about 35% of participants report having better access to places they need to go; 33% of participants report that having the pass has made their family's life easier; and 30% of participants feel they have more independence than before the program. Participants from schools in the New Haven USD had significantly higher than average agreement on these three measures. An average of only 11% of all participants reported that the program has had no impact, with most of these students being in the two free programs: at the Oakland USD and San Leandro USD.

Transportation Cost to Families

Year One of the STPP provided a financial benefit to participants.

In the fall 2016 student survey, over half of all participating students indicated that the cost savings provided by the program is important to them and their families. Over 25% indicated the cost savings the program is very important ("critical") to the student and his/her family.

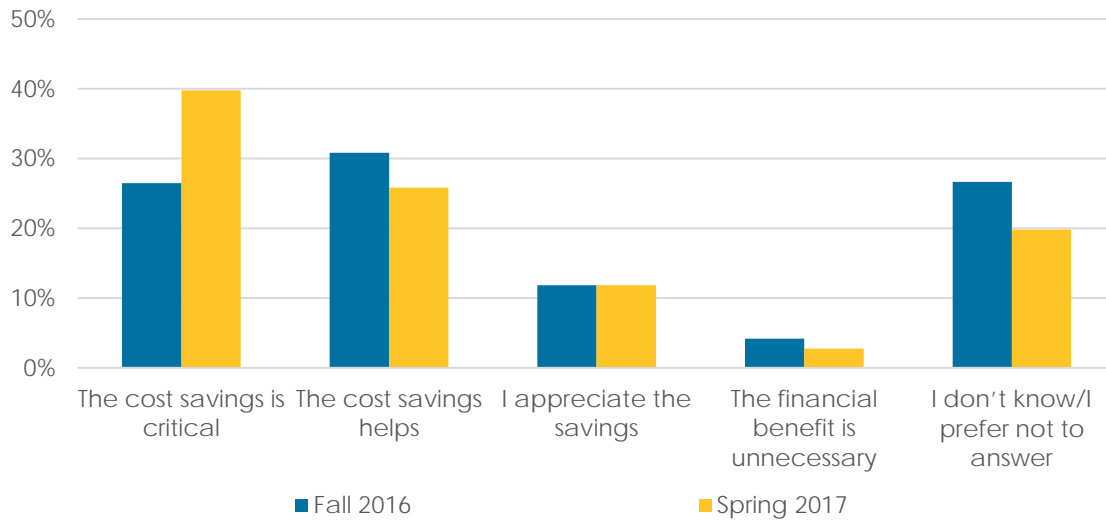
In the spring 2017 survey, fully two thirds of all participating students reported that this program has a critical or helpful financial benefit to their family, with higher levels of responses in these two categories globally and in all four programs. At least 50% of respondents fell into one of these two categories in each of the four programs.

The New Haven USD program (Discount + Limited Grade) had the highest share of participants reporting the financial benefit was critical or helpful, with 80% of respondents in one of these two categories. In contrast, the Livermore Valley JUSD program model (Discount + Means-Tested), where the majority of participants received a fully subsidized pass, had the lowest rate of students reporting that the pass was a critical or helpful financial benefit.

Comparing the two surveys directly, a higher proportion of participants reported that the cost savings was "critical" to their family in the spring. Figure 4-18 presents the comparative results across all Year One Schools for both surveys. Figure 4-19 presents results by program for both surveys.

" A lot of people paid for the pass in the first period, but this dwindled after the first round."

*Livermore High School Administrator
(LVJUSD)*

Figure 4-18 Importance of Cost Savings from STPP for Participants, All Year One Schools

This program is a significant cost savings for families in general, but discounted programs do not make sense for every family.

Students, site administrators, and school district staff shared testimonials and anecdotal evidence that this program made a significant financial difference for students and families, with free programs and the free passes for low-income students being more impactful than discounted programs. Staff reported that they received feedback that parents were reluctant to pay if the pass would only be for a partial month or if the student would not be taking transit regularly. The high up-front cost for the discount programs was also a burden for some families.

“For students who participated, it was really important, they rely on the bus. For kids and families with financial need, this was a great benefit.”

*East Avenue Middle School
Administrator (LVJUSD)*

“I am a foster child. Every morning is a hassle to get money or a ride to school. Every family has different issues. Now I can get here on my own.”

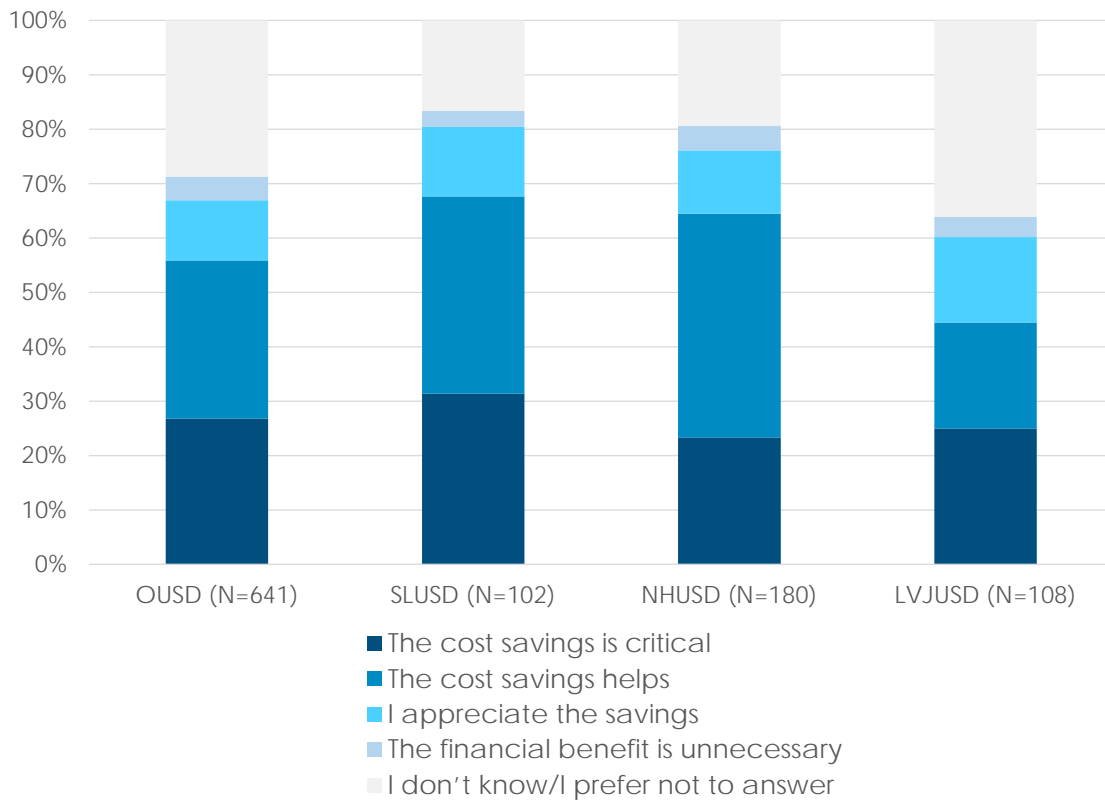
*Castlemont High School Student
(OUSD)*

“The main cost-related concern was for students who would not ride every day—the cost of the pass does not make sense if the student only rides a few days a week.”

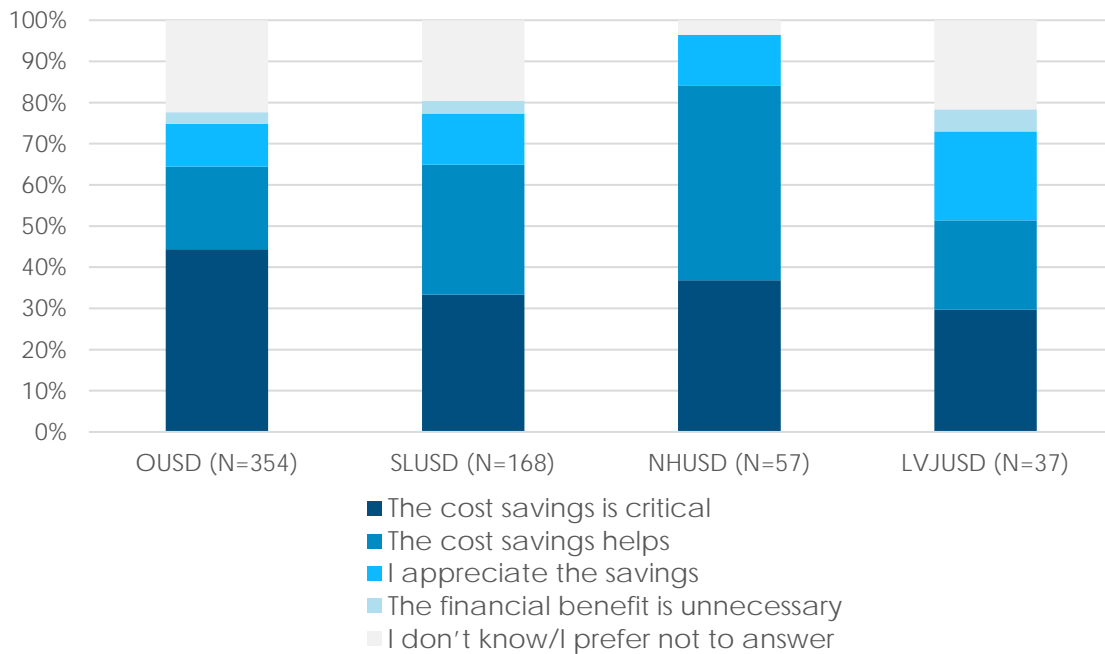
East Avenue Middle School Administrator (LVJUSD)

Figure 4-19 Importance of Cost Savings from STPP for Participants, by Program

Fall 2016 Survey



Spring 2017 Survey



Part II. Year One Implications for Implementation

A. Program Design

Program Reach and Participation

The model programs for Year One were designed specifically with diverse participant reach in mind. To ensure that geographic diversity and equity were addressed, one program model was implemented in each County planning area, and the transit pass cost borne by students and their families was informed by the participating schools' estimated student financial need.²¹

As discussed in Part I, enrollment in the free programs was higher than in other program designs, with the free and universal program having the highest enrollment. Programs that provided discounted passes had generally lower enrollment rates, which steadily decreased over the course of the school year (Figure 4-1). With the exception of the free + universal program, middle schools saw lower enrollment rates than their high school equivalents.

As part of the Year One implementation, the program team regularly engaged with students, families, community members, and school staff to keep them informed about the program and incorporate their feedback into the process. Commentary received from these stakeholders has been woven into relevant sections throughout this report.

Ease of Student Participation

School site administrators reported that they heard positive feedback from students and parents about the general usefulness of the program.

School site administrators related that program participants expressed very strong appreciation for the STPP in general, particularly when the pass was free, which was more accessible for a broad range of students and easier to understand than discounted program models that required payment by families.

School-based program was accessible for students due to familiarity.

In addition, students said that the program being school-based made it easy for them; they found it easy to access because they are already familiar with their school staff and did not have to approach a stranger or submit an application to an unknown entity.

²¹ Financial need was indicated by the percentage of students eligible for Free/Reduced-Price Meals (FRPM). Eligibility for FRPM is often used as a proxy for low-income/poverty.

“For those who participated, parents loved it. It’s very convenient—the bus stop is right outside.”

*East Avenue Middle School
Administrator (LVJUSD)*

“I had a parent cry when we told her the program was going to be expanded next year. She said, ‘I don’t have to worry about transportation anymore. I know the kids are going to get home safely.’”

*John Muir Middle School
Administrator (SLUSD)*

“...families usually have both parents working, so it makes a huge difference.”

*East Avenue Middle School
Administrator (LVJUSD)*

Limiting the program to select grade levels challenged some families.

Multiple school site administrators pointed out that limiting the program to a few grades is an ineffective model. When the program is limited to a few grades, families with siblings at the school will decline to participate, because they still have to drive the other student(s), which constrains uptake for eligible students. This feedback influenced the decision to move to all grades at all participating schools in Year Two.

“The only thing is that some students have siblings who are in a grade that isn’t eligible; the parents still have to drop off one child, so they don’t enroll the other one. If the program could be extended to all grades it would help.”

*John Muir Middle School Administrator
(SLUSD)*

“Another Year One constraint was that it was grade limited. There are enough siblings in the student population that it might have held back participation—if parents were going to have to drive one student, they would drive both, so why pay for a pass?”

*New Haven Unified School District
Representative (NHUSD)*

For some families, the program pushed parents/guardians to consider how much independence their student should be afforded.

School staff from SLUSD explained that some parents expressed concern about their children’s safety, both aboard public transit and while waiting for the bus. This is particularly a concern when the bus only comes once per hour; if the student stays late to ask the teacher questions and they miss the first bus, parents

do not like having their students “just standing around waiting on the street for such a long period.”²²

School staff also received feedback that parents are concerned about letting students travel independently, especially the youngest students. School site administrators at multiple middle schools reported that parents restricted the participation of their 6th grade students, with students in higher grades generally being allowed progressively more freedom. Some parents expressed a preference for a pass that would only work for trips to and from school, instead of travel outside of school times and to other locations, but it was not feasible to implement this kind of special-purpose pass product during a pilot.

Using FRPM eligibility as a proxy for student income level has its challenges.

It is worth noting that although FRPM eligibility is typically used as a proxy for student income level, it has its drawbacks. School staff had mentioned that sometimes those families who are often most in need of the program do not apply for FRPM because they are not aware or are reluctant to complete the application process. Families who are new to the United States may find the process of applying for the FRPM program challenging. As such, it is possible that the Year One program model utilizing FRPM eligibility to determine STPP eligibility (implemented at LVJUSD participating schools) may have indirectly limited access to this program for those students and families that needed it the most.

Ease of Administration for School Site Staff

The level of involvement and amount of time to administer the program varied significantly from school to school, depending on the pilot program design and number of participants.

Most staff characterized the level of effort required to participate in the program as “moderate,” though responses ranged from “easy” to “challenging.” The four program models tested in Year One each had a different level of administrative complexity and different rates of participation among their student body, which led to a wide variety of responses from school site administrators and district staff about the effort required for them to participate in the program.

All four program models needed extra effort at the beginning of the first year to set up the appropriate procedures. Schools with larger numbers of participants required a correspondingly higher amount of staff time to handle day-to-day requests such as card replacements.

The two program models that required payment from students (Discount + Limited Grades at NHUSD and Discount + Means Tested at LVJUSD) required significant time throughout the year for ongoing recordkeeping requirements related to money collection and tracking. Having a paid pass also raised the

²² Although the infrequent service could be a problem if a student misses their preferred bus, the increased access to transit options also improved student safety in some respects. For example, a police officer who works closely with a school in Oakland USD said that the STPP reduced conflicts, skirmishes, and fights after school and facilitated more “purposeful” travel, because kids were not hanging around waiting to get picked up.

expectations of parents and students for a higher level of responsiveness from school site staff whenever they had questions or problems with the program. The administrative complexity for NHUSD staff was the highest given the two pass formats, two pass periods, and two pass prices, high enrollment compared to LVJUSD, along with the program being grade-limited which created confusion and required turning students away who were not eligible.

Fully free programs (OUSD, SLUSD) were generally simpler to administer per pass, but program uptake was higher, leading to more total effort, especially at large schools.

“Just like any new program, they give it to me, and I push it out.”

*John Muir Middle School
Administrator (SLUSD)*

“There was a big portion of [work] at the beginning. That makes me say Moderate not Easy [level of effort].”

*San Leandro High School
Administrator (SLUSD)*

“Getting set-up with the drawer & the books was a lot, but now it’s easy. There is a rush when the pass period starts, but then it’s just replacing lost cards, no big deal... Once we had a system in place, then it was easy.”

*Livermore High School
Administrator (LVJUSD)*

“It’s not rocket science, not difficult. Just focus on the steps. Make sure you have the waiver and that you do each step. There wasn’t anything that was hard.”

*East Avenue Middle School
Administrator (LVJUSD)*

“The original packet was really big. But when you get down to it, the steps are not complicated.”

LVJUSD Representative

Even where the program model administrators found the processes time-consuming or difficult to work with, they acknowledged that the program was highly valuable to the students themselves, and they expressed interest in trying to find solutions to streamline the process to continue provide the benefit.²³

²³ Details of the staff suggestions for administrative changes to the program are provided later in this section. This feedback was taken into consideration in the design for Year Two, which is outlined in the Conclusion of this report.

“With the exception of a few hiccups, people do find it helpful. Being able to buy a reduced price pass is always going to be a big deal. But the [staff] people involved in making it happen felt like the administration was challenging.”


James Logan High School
Administrator (NHUSD)

“Each startup period is a bit hectic. If I’m not there, [the students] end up waiting, because I want to be sure it’s carefully handled..”

East Avenue Middle School
Administrator (LVJUSD)

“I made changes to the spreadsheet to make it easier for me.”

Livermore High School Administrator (LJVUSD)

 **Administrative effort on the part of participating schools was generally higher at the beginning of the year compared to ongoing administration, with the exception of program models involving financial transactions.**

Some site administrators reported using up to 60-70% of their available workweek during the initial sign-up period, and closer to 20% on an ongoing basis after that. School staff at SLUSD sites described needing at least an hour per day and up to 40% of their time to manage the program on average.


“It’s really time-consuming. I mean, I love doing the program. It’s not a burden. But it’s time consuming.”

James Logan High School (NHUSD)

“This program is positive; we are making a real difference for families, so you just get used to it because it’s helping.”

John Muir Middle School (SLUSD)

Paid programs (Discount + Limited Grades at NHUSD and Discount + Means-Tested at LVJUSD) generally required more effort per participant. The complexity of offering two different transit pass formats with different prices at the schools in the NHUSD was a significant drain on staff resources; site administrators said that only 5% of the time they spent on this program was related to the initial sign-up and set up, with 95% of the time for day-to-day troubleshooting. School staff in the LVJUSD said that time spent on program administration was not significant, but they acknowledged that student participation rates were relatively low, and expressed concern about the possibility of staffing requirements increasing if the program were to become more popular.

 **Clipper programming constraints and customer service posed significant challenges for set up and ongoing operations of the Pilot.**

In order to get the STPP up and running quickly with AC Transit without the time-consuming and expensive process of coding new fare products into the Clipper system, the STPP used adult Clipper cards and not youth cards, which may have generated some confusion when families called in to ask about the status of

student passes.²⁴ In order to limit the distribution of students' personally identifiable information, all cards were coded with the school's address instead of individual home addresses, and students were not encouraged to register their cards with personal information. As a result, it was more difficult to track lost cards in the Clipper system.

Multiple schools cited problems with the Clipper card replacement process for AC Transit passes.

School site administrators reported that the Clipper card replacement process was challenging. Clipper customer service handled card replacement. Clipper customer service covers the entire Bay Area with a vast array of transit operators, pass types, and fare options; as such, phone representatives were not always familiar with the details of this pilot. School site administrators and participants were given instructions about how to ask Clipper customer service for help with the program's design features, but these guidelines did not always yield the desired results. Some school site administrators felt like they were replacing cards almost every day, and they became frustrated by the way that the process did not work smoothly.

School staff feedback influenced changes to the program in Year Two.

Throughout the school year, school staff provided specific recommendations for program changes that could decrease their workload and simplify card processing and program administration. This feedback, listed below, was taken into consideration during the design for Year Two.

- Improve pre-program communication and training:
 - **"...More in-person meetings with school staff at the beginning, well before the first registration day."** James Logan High School
- Use online sign-up forms instead of paper.
- Simplify spreadsheet tools used for data exchange where possible.
- Provide a "quick reference" set of simplified instructions for school site administrators to use on a day-to-day basis.
- Simplify the processes for determining students' eligibility for discounts.
- Reduce financial complexity of the programs.

"The financial accounting piece was what we had the greatest struggle with. It was very labor intensive for our business department. If you are ever doing a money-based program with another school, you need to have an in-person sit-


²⁴ The STPP needed to use "Institutional period passes" which are uniquely programmable Clipper pass products that allow for bulk payment arrangements between agencies rather than for each individual pass. Under the existing Clipper system, AC Transit only has institutional products available on adult Clipper cards. To program a new pass type entails significant time and expense that the Pilot does not allow for.

down with all the parties to develop a shared understanding of how the money will be handled, and go over the steps to train staff.” James Logan High School

- Offer a temporary pass to hold over students while they wait for replacement cards to arrive. Because parents have set up their family schedule assuming the pass will be available, the gap in pass coverage can be very difficult for some families to deal with. A site coordinator in SLUSD said that one student asked for help figuring out what to do while they waited for the replacement, saying, “I need it right now. My mom can’t drop me off. What do I do now?”
- Find a way to notify school staff about the status of each replacement card, e.g., requested, printed, versus mailed. This will help school site administrators respond to questions from parents without having to call the Customer Service line again.
- Reduce the number of sign-up periods to minimize ongoing workload.

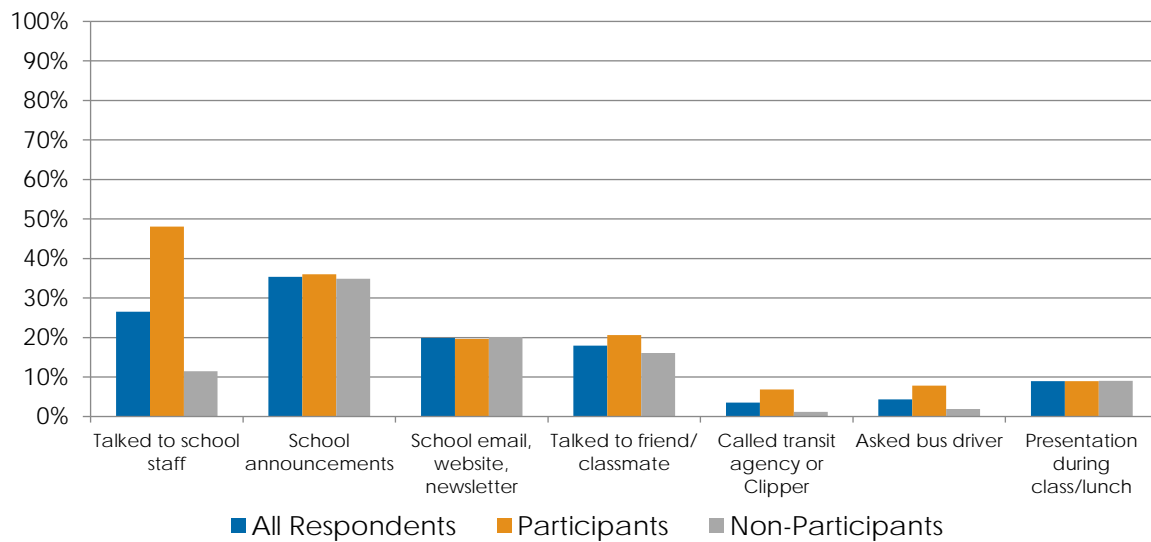
As previously discussed, using FRPM as a proxy for low-income status has some drawbacks. Due to privacy concerns, this information was only available to school program administrators, who indicated that it was time-intensive to verify individual student eligibility. Some school staff did not have easy access to this information, which added further complexity to the process. This feedback was incorporated into the Year Two program design in income-based program models.

Marketing and Outreach

 **Students primarily get their information about the STPP from school resources and friends or classmates, rather than sources outside of school. However, promotion of the program varied from school to school.**

Based on the results of the spring 2017 student survey, more students reported obtaining information about the program through official school channels, including websites, newsletters, and talking to staff, than from other options such as talking to the bus driver, transit agencies, or Clipper customer service. Responses were generally similar between participants and non-participants with one exception: a far higher share of participants reported talking to school staff about the program than non-participants. This could suggest that contact with school site administrators is a particularly effective means to recruit students into the program.

Figure 4-20 Ways that Students Learned About the STPP (Spring 2017)



School site administrators report that general awareness of this program is uneven, but that once families find out about the program, most can easily understand program rules and processes.

School site administrators in multiple locations explained that students and parents are generally overloaded with the variety and volume of information they receive from schools, so it can be hard to get their attention for this new program. Discussing reasons that low-income students might not opt-in to the fully subsidized pass available to them in Livermore Valley JUSD, one site administrator said:

“For us, just getting the information out to them is the biggest obstacle in whether or not they decide to get the free pass. We send so many messages to them, they are on overload.” Livermore High School (LVJUSD)

And regarding one of the paid passes, school staff explained:

“The barrier is not the cost, it’s how can we make it exciting and interesting, so that it stands out from the other things that are taking up their attention.” East Avenue Middle School (LVJUSD)

One middle school site administrator reported that there was sometimes confusion within the same household, saying:

“I had one kid that told me he lost his ID card, but it later emerged that his brother had taken it in order to get free transit rides, even though his brother was eligible for same pass at his high school! I had to explain to him that his brother could get a pass the same way and they both could ride.” East Avenue Middle School (LVJUSD)


Although general awareness of the existence of the STPP varied from district to district and from school to school, school administrators reported that students who engaged with the program seemed to be able to follow the procedures easily. Regarding the registration form, one administrator said:

“We received very few questions. It was pretty self-explanatory.” Livermore High School (LVJUSD)

When asked about what it was like to have multiple sets of pass rules in place, another administrator said:

“I would just give the information they could take home to their parents. Only a handful of people came in confused.” East Avenue Middle School (LVJUSD)

Payment procedures caused some confusion.

 **Onsite bus rider education and travel training at middle schools encouraged more students to participate in the program and made them more confident about riding the bus.**

Middle school students became more enthusiastic and confident about using their transit pass immediately after each event. During travel training at Frick Impact Academy (OUSD), the sixth graders expressed being scared to ride the bus; for most of them it was their first time ever taking a bus alone. One reason that travel training is so important is that most students do not know where the bus routes go. In one school in New Haven USD (Discounted + Limited Grades), students bought the pass before they confirmed that the bus would go near their house; they just assumed that because the program was offered, there would be a route that served them. One middle school site administrator acknowledged that the travel training was a big help because:

“I realized that I hadn’t ridden the bus myself in years, so I suddenly worried I was giving out wrong information.” East Avenue Middle School (LVJUSD)

“Before, they didn’t know how to ride the bus. They are still young, so they need a push” John Muir Middle School (SLUSD)

“We just had another burst of sign-ups after the travel training.” John Muir Middle School (SLUSD)

“I think there was a bump in ridership, but not pass sign-ups.” East Avenue Middle School (LVJUSD)

In terms of specific activities, the students at John Muir MS responded especially well to the bus being on campus and the 3-D paper models, and the teachers there really appreciated having an activity that was outside the classroom. The eighth graders at Frick MS understood Next Bus and were comfortable with technology.

Multiple site administrators reported that high school students are not interested in travel training sessions, because they want to be more independent. However, some occasionally have questions. If the transit information is available in a self-service format, such as via posters and pamphlets, the students tend to be able to get the information without staff assistance. Another challenge is that some high schools do not allow students to leave school grounds, and if the bus cannot be brought onto the property at an appropriate location, the activities available during training sessions were necessarily more limited.

B. Integration with Existing Transportation Programs

Linkages with Existing Fare Payment Options

Although Year One of the STPP did not establish any linkages with existing fare payment options, the need for this aspect in the future was considered as part of the program model design. Due to the technological complexity and multiple privacy issues, STPP transit passes on Clipper cards could not be added to participants' existing Clipper cards as part of the pilot program. However, participants could add other transit passes and electronic cash to their Clipper card with the STPP pass on it. The program models (Free + Universal at OUSD and Free + Limited Grades at SLUSD) that provided STPP passes on Clipper cards had the highest enrollment; these passes were also more easily evaluated using the data collected by Clipper.

Linkages with Other School-Based Transportation Program

One school reported that the STPP might be able to backfill a former transportation program that will not have funding to operate next year:

“The Cesar Chavez middle school has an after-school program that serves about 150 kids who are low-income / high-risk. In the past, we had a grant to pay for bus service to take 50-60 kids back and forth from Cesar Chavez into the Decoto neighborhood each evening, but we did not get funded for next year. A lot of the participants would probably qualify under the means-based Year Two program, so it's perfect.” KidsZone afterschool program (NHUSD)

The STPP and Safe Routes to School Program coordinated on some program aspects.

Year One participating schools were encouraged to enroll in the Alameda County Safe Routes to School (SR2S) program, which works with elementary, middle, and high schools to encourage walking and bicycling to school. SR2S's work includes activities and programs with key messages about pedestrian and bicyclist safety and health and overseeing assessments to identify and address barriers to active transport. SR2S coordinators were invited to support STPP program staff's travel training events at middle schools participating in Year One, leveraging the combined messages of increasing affordable and sustainable student transportation options.

Year One participating schools' involvement in SR2S varied with no clear association with the type of STPP program model implemented. For instance, schools with the Free + Universal program model were not necessarily more or less involved than those where other program models were implemented. Generally, schools that had already been actively involved with the SR2S program continued their involvement.

The program alleviated the pressure for participating schools to purchase separate transit passes for eligible students.

McKinney-Vento is a federal program that provides grants to help pay for services for homeless adults and children. School transportation is an eligible expense for the program, and some districts use McKinney-Vento funds to buy transit passes for qualifying students. When asked directly about the relationship

between STPP and McKinney-Vento, feedback was mixed. One school administrator said that they did not think the STPP had an impact on the needs of students who qualified for McKinney-Vento, but another suggested there had been a benefit to those students, saying:

“Maybe this program has helped. In the past three-plus years that I’ve been at this school, I have always had a stockpile of passes at my desk, but I haven’t had to request any replenishments this year, so it has definitely gone down. In a normal year, 5-6 families have asked, but this year I can’t think of any that have come in.” Livermore High School (LVJUSD)

The fact that school districts may not need to use their federal funds on transit passes does not necessarily create an avenue to leverage funding for school transportation, but it does free up money to be used on other services funded via McKinney-Vento.

Leverage of Funding and Administration Programs

California Assembly Bill 17 (AB17), introduced by Assembly Member Chris R. Holden in December 2016, deals with a transit pass pilot program for California students. Alameda CTC actively supported this bill; however, it was vetoed by the governor in October 2017. The proposed bill would have established a pilot transit pass program that provided free or reduced-fare transit passes. Eligible students would have included students attending public middle and high schools that are eligible for Federal Title I funding as well as students attending a California community college or a state or public university who are eligible for certain financial support.

Alameda CTC staff will continue seek additional funding the support the STPP from local, regional, state, and federal sources.

C. Impacts on Transit Operators

Administration

Transit agencies were critical partners in program success — and in troubleshooting.

AC Transit staff estimated that 75% of the total time they spent working on this program was just on the day-to-day routine card processing, with only 15% spent on the start-up activities, and the remainder spent on marketing and internal administration. Union City Transit reported that this program was of moderate difficulty for them, primarily due to one-time set-up issues, though the extra effort to train drivers on how to record trips was a significant component of their overall efforts. LAVTA/Wheels reported that their administrative staff has spent about an hour a month working on this program; they characterized participation as easy.

The rapid development timeline and unique requirements of the STPP (e.g., the need for specialized cards and detailed data tracking) required significant coordination and effort up-front, especially for AC Transit staff. Creation, tracking, and management of Clipper cards continued to require staff resources throughout the year; however, the level of effort diminished as processes became more streamlined.

Year One dedicated a substantial level of effort to creating the policies and procedures necessary to produce and distribute Clipper cards to students in

multiple school districts in a way that allowed for fine-grained data tracking. Most communications related to card processing (activation, replacement, deactivation, etc.) were conducted via regular email between Alameda CTC staff, the consultant team, and AC Transit staff, each of whom had different responsibilities in the process. AC Transit staff were responsible for creating the Clipper cards used in the STPP. This required significant coordination to prepare and track the progress of specific card shipments. Schools and students understandably wanted to receive updates on where their cards are in the process, staff provided as much ‘customer service’ as was feasible given the level of staffing available.²⁵

Most transit operators did not consider the financial impact of Year One administration significant.

Staff from Union City Transit and LAVTA/Wheels did not describe any significant financial impact of this program. AC Transit has spent considerably more time on this project than the other operators, because of their efforts to issue and activate Clipper cards. Year Two program design took into consideration the complexity of program administration by the transit operators.

Operations and Ridership

- ☀ **Although some communities reported higher ridership on some bus routes as a result of the STPP, no major operations or behavioral issues or concerns were identified by transit agency staff.**

Transit agency staff did not report any issues with spikes in boardings or unruly students causing operational issues. LAVTA/Wheels reported that they had an easy time incorporating the pass into their routines; they programmed GFI keys to track flash pass usage within our program. Union City Transit had slightly more difficulty, because of the use of the flash pass stickers in this program. Specifically, some bus operators reported that sometimes students with flash passes would try to put their thumb over an expired sticker to try to get on the bus even though they did not have the current pass. Some students tried to flash their Clipper pass as evidence of having purchased a Union City Transit pass, and other students tried to show their student ID without an appropriate sticker on it. These occurrences were relatively rare and easy for the driver to handle, but Union City Transit staff said that more training and communication would be helpful to clarify the program rules for staff and drivers.

School site administrators had different perceptions of the transit service experience than transit operators.

Some school administrators reported that historical crowding on the school-serving bus routes meant that this program could not reach its full potential benefit. For example, if the bus passes up the student because it is full, the

²⁵ Based on this feedback, a decision has been made to transition to a structured card processing schedule for Year Two, in which requests will be grouped into regular batches. It is anticipated that a regular schedule will reduce the need for ad hoc inquiries and last minute ‘rush’ requests, which will in turn help reduce overall workload for both school and transit agency staff.

student will still be late and miss a portion of the school day. Other school site administrators said that their hourly frequencies are insufficient to meet student and family needs. One administrator noted that if a student wanted to stay just a few extra minutes late for extra help from a teacher, they would have to wait a long time to get the next bus, which both parents and students dislike.

“Yes, our superintendent has mentioned that he’s getting complaints from adult community members saying that buses are now really crowded.” SLUSD

“Yes, after school gets out, our buses are jam-packed.” San Leandro High School (SLUSD)

The STPP may have benefited some students who previously purchased transit passes directly from area transit operators.

Based on available data, there is preliminary evidence that some pilot participants may be shifting to the STPP pass from other retail youth fare products; however, this effect is difficult to confirm for all transit operators due to Year One data limitations. For instance, only boardings with Clipper tags were available from AC Transit, so the changes in AC Transit boardings paid for in cash could not be assessed. The program team is currently working with transit agency staff to access additional data for evaluation of future years.

AC Transit

Some students now choosing to use the STPP transit pass may have previously ridden transit using other forms of fare payment, potentially including single ride youth fares paid in cash and youth fare products available on Clipper, such as a 31-day rolling pass and a relatively new “accumulator” style pass. To understand how much fare product substitution may be occurring between the STPP and these existing Clipper fare products, trends in youth ridership with Clipper products prior to the STPP were compared to the year-over-year changes observed during Year One of the pilot.

For the five years prior to the STPP (up through 2015-16), AC Transit saw an average decrease of 85,000 Clipper retail youth boardings each year, with a relatively high variation from year to year and month to month.²⁶ In 2016-17, AC Transit lost 358,000 Clipper retail youth boardings, or 272,000 more than the recent average annual loss. At the same time, there were almost 522,000 STPP boardings for Year One, which is higher than the total decrease in youth boardings with Clipper in the same time period. Youth are not required to purchase a youth fare product when they ride AC Transit, nor are they required to use a Clipper-based pass to receive a youth fare, so it is possible that these changes are partly due to shifts between other existing fare products, rather than an absolute net change in youth ridership.²⁷

²⁶ The statistics reported under this finding are all expressed based on August to July ridership totals, in order to align with our reporting years. As such, it is possible that it varies from AC Transit publications based on fiscal year reporting.

²⁷ Alameda CTC reimburses AC Transit for every pass distributed, regardless of usage, so regardless of overall result, the STPP is not resulting in any loss of revenue for AC Transit.

Union City Transit

For the three years leading up to the STPP (up through 2015-16), system-wide ridership mostly trended downward; Union City Transit lost an average of 17,000 retail youth boardings each year, with a relatively high variation from year to year and month to month.²⁸ In 2016-17, Union City Transit lost 35,000 retail youth boardings, or 18,000 more than the recent average annual loss. At the same time, there were around 18,000 STPP boardings for Year One. This suggests a likelihood of substitution away from the other youth fare products to the STPP, and that Year One had no effect on the underlying trends in ridership.

LAVTA/Wheels

For the three years leading up to the STPP (up through 2015-16), LAVTA also saw a general gradual decline in system-wide ridership. However, LAVTA also gained an average of 6,000 school-based route boardings²⁹ each year, with a relatively high variation from year to year and month to month.³⁰ In 2016-17, LAVTA/Wheels gained 207,000 boarding on school-based routes, which far exceeds the number of STPP boardings for the same period (approximately 25,000). This may be partially due to recent route restructuring, which occurred shortly before the start of Year One. Overall, this data suggests a minimal association between the STPP and ridership on LAVTA's school-based routes.

D. Program Costs

Estimating costs associated with the Year One program was challenging due to the multiple entities involved in its administration. Although Alameda CTC held financial agreements with the transit agencies regarding payment for the specific STPP transit passes, transit agency staff time was not included to the same degree; school staff was not compensated for their time. As such, the costs below reflect the cost of passes only.

Program Costs per Participant

Higher program costs per participant were associated with transit agencies with more expensive monthly fare products. On a per participant basis, the discounted programs were the most labor intensive to administer, but the free programs also required significant administrative time due to the large number of participants.

As the full costs of staffing were not captured at the agency level by all transit operators, the highest absolute costs were associated with the programs with the highest enrollment, i.e., program models with only free transit passes. As

²⁸ The statistics reported under this finding are all expressed based on August to July ridership totals, in order to align with our reporting years. As such, it is possible that it varies from Union City Transit publications based on fiscal year reporting.

²⁹ Retail youth boarding data was not available for LAVTA as they do not have a youth-specific fare product. To approximate a comparison with other transit operators, this analysis examines ridership on school-based routes, or "school trippers."

³⁰ The statistics reported under this finding are all expressed based on August to July ridership totals, in order to align with our reporting years. As such, it is possible that it varies from Union City Transit publications based on fiscal year reporting.

previously discussed, participation in the free programs was much higher than the other programs, so on a per participant basis, these were the least costly programs. The highest staff resources per participant were in the complex New Haven USD program. The Discount + Means-Based program model at LVJUSD appears to have the highest annual cost per participant because it involved the most expensive monthly fare product.

Figure 4-21 Program Costs per Participant by Program Model

School District	Program Model Type	Number of Students Eligible	Average Annual Number of Passes			Average Participation Rate	Year One Program Costs ³¹	Annual Cost per Participant	Level of Effort per Participant
			AC Transit	Union City Transit	LAVTA/Wheels				
Oakland USD	Free + Universal	1,843	1,823	--	--	99%	\$457,250	\$251	Low
San Leandro USD	Free + Limited Grades	1,614	821	--	--	51%	\$205,926	\$251	Low
New Haven USD	Discount + Limited Grades	2,270	125	--	--	9%	<i>AC Transit:</i> \$31,353	\$251	High
			--	77	--		<i>Union City Transit:</i> \$29,645	\$420	
Livermore Valley JUSD	Discount + Means-Tested	2,441	--	--	82	3%	\$59,040	\$720	Medium

³¹ The Year One pass costs for AC Transit reflect the cost of passes, Clipper cards, and Clipper card shipping; the Year One pass costs for Union City Transit reflect only 11 months for Year One, but the Annual Cost per participant reflects the full 12 month equivalent.

Administrative Level of Effort

Combining consulting and Alameda CTC staff effort, the majority of administrative costs for the program team were expended on one-time tasks associated with developing and initiating the program.

Excluding direct costs for purchasing passes and evaluation expenses, consultant costs in advance of Year One and during Year One totaled approximately \$500,000, of which nearly \$240,000 was for planning and program design and the remainder for implementation of the first year of the STPP. Leading up to the Year One launch, Alameda CTC staff utilized approximately 40% FTE total over the course of 9 months. To administer Year One, Alameda CTC staff utilized approximately 50% FTE average over the course of the year with less intense and more intense periods requiring additional staff time. Staff included a program manager, oversight from executive management, and administrative support.

Each year of the STPP will likely have a certain amount of start-up costs as the program evolves over time and additional schools participate in the STPP. Although the cost per participant will likely decrease at schools that have participated in prior years, the program team anticipates that additional effort leading up to the school year will always be necessary to introduce newly participating schools.

Administrative costs associated with the STPP program team (Alameda CTC staff and consultants) were generally higher on a per pass basis for the more complex models, though ongoing production and tracking of pass products which was directly related to participation levels, was also a significant use of staff resources.

Administrative costs associated with the STPP program team (Alameda CTC staff and consultants) were generally higher for program models that included multiple pass formats (i.e., Discount + Limited Grades at NHUSD) and that included fund collection from students (i.e., Discount + Limited Grades at NHUSD and Discount + Means-Tested at LVJUSD).

5 Conclusion

From its inception, the STPP set out to:

- Reduce barriers to transportation access to and from schools
- Improve transportation options for Alameda County's middle and high school students
- Build support for transit in Alameda County
- Develop effective three-year pilot programs
- Create a basis for a countywide student transit pass program (funding permitting)

As such, the evaluation of Year One of the STPP assesses the program's impacts on students and their families, transit ridership and perceptions of transit, as well as the implications for overall administration and implementation. As discussed in Chapter 4, Year One STPP has made a positive impact on students and their families and benefited transit. The program team also gained valuable insight for implementing additional phases of the student transit pass program and identified opportunities for streamlining program design and administrative processes.

Key Lessons

Some key lessons from the analysis directly informed the design of Year Two:

All Year Two program models are available to students across all grades at participating schools.

Limiting programs to a subset of grades reduced program uptake, because families with siblings at the same locations still had to drive students in non-participating grades.

All Year Two programs are free and will not require students, school districts, or schools to handle funds.

Cash handling at school sites and districts introduced complexity and administrative burden and it was difficult to achieve clarity around processes for staff, parents, and students.

Multiple districts will test the same model in order better gauge demand and support in different communities and enable more direct comparisons.

It was difficult to draw conclusions from Year One participation rates about student transit need and behavior in different parts of the county due to the fact that a different program model was tested in each area.

NHUSD students, who have access to AC Transit and Union City Transit will get one Clipper card that provides unlimited access to both systems, eliminating the need for two pass products.

Having too many pass products/permutations at a single location added complexity and administrative costs without generating meaningful gains in

transportation accessibility, and could have possibly undermined student participation due to confusion.

Program Design for Year Two

Six new schools have been added and program models have been simplified. Year Two will implement two different program models at 15 school sites across five school districts. The two program models to be implemented are:

- **Free + Universal:** All enrolled students at participating schools will receive a STPP pass for free.
- **Free + Means-Tested:** All students who report that their household income meets the criteria for the FRPM program will receive an STPP pass for free.

Figure 5-1 Year Two Participating Schools

Year Two Program Model	School District	Participating Schools	Participating Transit Operator(s)	Students Eligible in Year One	Students Eligible in Year Two	Year One Participants	Year Two Participants ³²
Free + Universal	OUSD	<ul style="list-style-type: none"> ▪ McClymonds High* ▪ Fremont High ▪ Castlemont High ▪ Westlake Middle* ▪ Frick Middle 	AC Transit	1,843	3,065	99% (1,823)	94% (2,869)
Free + Universal	SLUSD	<ul style="list-style-type: none"> ▪ San Leandro High ▪ John Muir Middle 	AC Transit	1,614	3,618	51% (821)	42% (1,535)
Free + Means-Tested	HUSD	<ul style="list-style-type: none"> ▪ Hayward High* ▪ Bret Harte Middle* 	AC Transit	--	1,615	--	20% (320)
Free + Means-Tested	NHUSD	<ul style="list-style-type: none"> ▪ James Logan High ▪ Cesar Chavez Middle 	AC Transit Union City Transit	2,270	2,641	9% (196) ³³	12% (238)
Free + Universal	LVJUSD	<ul style="list-style-type: none"> ▪ Livermore High ▪ Del Valle High* ▪ East Avenue Middle ▪ Christensen Middle* 	LAVTA/ Wheels	2,441	3,188	3% (82)	17% (553)

*Asterisks indicate schools participating in the STPP for the first time.

³² Year Two participation data as of September 1, 2017.

³³ The number of participants in the NHUSD program is slightly lower than the sum of the number of passes, due to some students purchasing both passes. This resulted in a slightly lower participation rate.

Although the Free + Universal program model implemented at all LVJUSD participating schools is identical from a student/school perspective to the other Free + Universal programs, it is a slightly different pass product than the AC Transit pass. Considered an “eco-pass” format, an established price is paid to the transit operator based on the number of eligible students, whereas the institutional agreement with AC Transit is based on the number of transit passes created, which varies with participation. Year Two evaluation will examine whether this format has an impact on overall program costs and the program costs per participant.

All STPP transit passes will be provided on Clipper cards to further facilitate integration with existing fare payment systems. As in Year One, passes are not restricted by time of day or day of week. In addition, all eligible high school students at schools within one mile of a BART station may request one BART Orange Ticket with a \$50 value. These tickets are not restricted by time or day, but they are non-refundable and non-replaceable.

In response to concerns raised regarding the administrative burden and the ease of student participation, Year Two includes certain changes to processes:

- To support transit operator staff and set clearer expectations for schools and students, student enrollment will occur once per month through an online form.
- Students replacing transit passes still must go through Clipper (except for LAVTA/Wheels), but the program team developed a visual guide to replacing the card online or by phone, with the hope of streamlining that process and the database will be updated to include school names for easier communication with students/families and school staff.
- Students are encouraged to register their Clipper cards online to help with the likely need to replace lost or missing STPP passes in the future.
- LAVTA/Wheels is processing its own replacements through an online form.

Next Steps

Alameda CTC will present the Year Two STPP Evaluation Report in fall 2018. At the end of summer 2019, Alameda CTC will present an evaluation report that encompasses key findings from Year Three as well as findings for the overall three-year pilot program. Based on the subsequent reports, recommendations will be prepared for potential program expansion countywide and for other possible funding opportunities to support an expanded program.

