Affordable Student Transit Pass Program - Model Program Sites and Parameters
Planning, Policy and Legislation Committee

Agenda

• Background
• Review of Site Selection Methodology
• Model Program Development
  ▪ North County
  ▪ Central County
  ▪ South County
  ▪ East County
• Next Steps
Background

Affordable Student Transit Pass Program

Developing pilot programs for middle and high school students to begin in 2016-2017 school year

- Three-year pilot period, with annual evaluations and adjustments to implementation
- Program in four subareas to make transit affordable or prioritize crossing guards
- First step toward a universal affordable transit pass program for students in Alameda County
Overarching Goals and Commission Direction

- 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

Overarching Goals and Commission Direction

- At least one pilot program will be an universal free transit pass, to be implemented in a planning subarea that demonstrates the most financial need
- Address student crossing guard needs
- Transit operators are serving as partners only for duration of pilot program period (three years)
Pilot Program Development

Phase I - Site Selection
- Define Site Selection Framework (March 2016 Commission Approval)
- Assess Potential Sites for Model Program (April 2016)
- Recommend Model Program Sites (May 2016 Commission Approval)

Phase II - Program Design For Model Program Sites (June-August 2016)
- Based on Selected Model Program Sites, Develop Program Parameters
- Tailor Program Characteristics for Each Model Program Site
- Finalize Design for Each Model Program Site

Phase III - Pilot Program Implementation at Model Program Sites (Fall 2016)
- Implement Program at Minimum of Four Model Program Sites

Site Selection Process
Site Selection Process

**Phase I** - Evaluate data on school needs and transit service availability

**Phase II** - Outreach to shortlisted schools on readiness and level of interest
Site Selection – Phase I

1. Identify paired schools within each planning area
2. Tally enrollment to understand registration implications
3. Update demographic data
4. Conduct initial sort

Site Selection Criteria & Considerations

- Bus Stop within 1/4 mile
- School Pair
- “Traditional” school day
- Income Levels/Leverage Opportunity
- 2+ routes serving bus stop(s) within 1/4 mile of school
- “Transportation” identified as issue by district/school
- High minority vs. low minority
- High ethnic diversity vs. low ethnic diversity
- Safe Routes to Schools participant
- Transit travel training program participant
<table>
<thead>
<tr>
<th>Planning Area</th>
<th>School District</th>
<th>School Name</th>
<th>School Type</th>
<th>Level</th>
<th>Grades</th>
<th>Enrollment</th>
<th>Existing Bus Stop within 1/4 mile of School</th>
<th>Income Opportunity (percent of FRPM eligible students)</th>
<th># of Bus Routes</th>
<th>Phase I Tiering</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Berkeley Unified</td>
<td>REALM Charter</td>
<td>High Traditional</td>
<td>High</td>
<td>9 - 12</td>
<td>361</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>75%</td>
<td>9</td>
</tr>
<tr>
<td>North Berkeley Unified</td>
<td>REALM Charter</td>
<td>Middle Traditional</td>
<td>Middle</td>
<td>6 - 8</td>
<td>350</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>75%</td>
<td>9</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>REALM Charter</td>
<td>High Traditional</td>
<td>High</td>
<td>9 - 12</td>
<td>505</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>89%</td>
<td>6</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>REMENT</td>
<td>High Traditional</td>
<td>High</td>
<td>9 - 12</td>
<td>236</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>89%</td>
<td>6</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>REMENT</td>
<td>High Traditional</td>
<td>High</td>
<td>9 - 12</td>
<td>1353</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>88%</td>
<td>20</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>REMENT</td>
<td>Middle Traditional</td>
<td>Middle</td>
<td>6 - 8</td>
<td>526</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>86%</td>
<td>3</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>REMENT</td>
<td>Middle Traditional</td>
<td>Middle</td>
<td>6 - 8</td>
<td>524</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>86%</td>
<td>9</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>538</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>87%</td>
<td>6</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>544</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>87%</td>
<td>18</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>390</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>94%</td>
<td>3</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>380</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>92%</td>
<td>1</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>380</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>92%</td>
<td>1</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>380</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>92%</td>
<td>1</td>
</tr>
<tr>
<td>North Oakland Unified</td>
<td>Bernard Parent Middle</td>
<td>Traditional Non-charter</td>
<td>Middle</td>
<td>6 - 8</td>
<td>380</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>92%</td>
<td>1</td>
</tr>
</tbody>
</table>

172 schools → 36 schools short listed

- 15 high schools, 20 middle schools, and one combined middle/high school selected
  - North County: 4 high schools, 1 middle/high school, 9 middle schools
  - Central County: 3 high schools, 4 middle schools
  - South County: 3 high schools, 3 middle schools
  - East County: 4 high schools, 6 middle schools
- Potential pool for additional school sites in year 2 of the pilot
Site Selection – Phase II

• Readiness assessment conducted via phone and email, with input from Alameda County Office of Education (ACOE), Safe Routes to Schools (SR2S), and transit operators.

• Assessed on five characteristics:
  - Interest, enthusiasm, and support
  - Leadership continuity
  - Communication mechanisms
  - School culture and programs
  - Summer availability

Site Selection - Phase II

• Each short-listed school was given opportunity to have its readiness evaluated.

• Not all schools responded to the request for assessment.

• 18 out of 36 short listed schools responded:
  - North County: 3 high schools, 3 middle schools
  - Central County: 2 high schools, 2 middle schools
  - South County: 2 high schools, 2 middle schools
  - East County: 2 high schools, 2 middle schools
Pilot Model Program Recommendations

Key Inputs Into Recommended Model Programs

- Research on best practices
  - National and Bay Area Programs
- Analysis of existing conditions
  - School need and transit service availability
- Student Transit Pass program stakeholder and Commission input
  - March 24: Commission approval of site selection framework and performance measures
  - April 20: Affordable Student Transit Pass Workshop
Model Program Recommendations

4 Pilot programs; 1 in each planning area
11 schools in total
All model programs include the following characteristics:

- Information and training for students on using transit and the applicable passes
- All passes will be effective year-round, and not be limited by day or time
- A designated on-site administrator at each school, who will receive training associated with the applicable pass program
- Leverage: 7 out of the 11 are in Communities of Concern or Disadvantaged Communities
  - Opportunities to leverage funds at the Regional and State level

Model Program Characteristics

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Options Tested</th>
<th>North</th>
<th>Central</th>
<th>South</th>
<th>East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass Format</td>
<td>Clipper</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Flash pass</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Applicability</td>
<td>Universal (all students)</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Specific grades</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Pass Cost</td>
<td>Free</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Discounted</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Information only</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Need</td>
<td>High</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Medium</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Low</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Model Program Characteristics

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Options Tested</th>
<th>North</th>
<th>Central</th>
<th>South</th>
<th>East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AC Transit</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BART</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union City Transit</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>LAVTA</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Grade Levels</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Select Grades</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Middle Schools</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>High Schools</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

North County Recommendations

- Two programs recommended due to number and diversity of schools
- Pilot programs will test:
  - Utilization of free and universal passes
  - Sustained impact of passes during transition from middle to high school
  - Effectiveness of information-only programs on student transit ridership
    - Information only has potential to expand to all schools
North County – Pilot Program A

- Free and universal (all students) transit pass on Clipper provides access to AC Transit services
- Free BART Orange and Red tickets upon request (limited to one per student per month)
  - Castlemont High School
  - Fremont Middle School
  - Frick Middle School

North County – Pilot Program A

- Approximately $722,000 for cost of passes and administrative costs associated with Clipper set-up and school administration

<table>
<thead>
<tr>
<th></th>
<th>Fremont High (Oakland)</th>
<th>Castlemont High (Oakland)</th>
<th>Frick Middle School (Oakland)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Students</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fremont High</td>
<td>811</td>
<td>505</td>
<td>241</td>
</tr>
<tr>
<td>Fremont Middle</td>
<td>76%</td>
<td>89%</td>
<td>94%</td>
</tr>
<tr>
<td><strong>Transit Presence</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fremont High</td>
<td>6 AC Transit routes</td>
<td>8 AC Transit routes</td>
<td>7 AC Transit routes</td>
</tr>
<tr>
<td></td>
<td>(2 high frequency, 2</td>
<td>(2 high frequency, 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>school trippers, 2 low</td>
<td>school trippers, 2 express</td>
<td></td>
</tr>
<tr>
<td></td>
<td>frequency)</td>
<td>routes, 1 low frequency)</td>
<td></td>
</tr>
<tr>
<td><strong>Readiness</strong></td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
</tr>
</tbody>
</table>
North County - Pilot Program B

- Informational program provided at middle and high school
- Program team will provide outreach and engagement activities to support transit use
  - Berkeley REALM Charter High School
  - Berkeley REALM Charter Middle School
North County – Pilot Program B

- Approximately $134,000 for cost of transit pass information, travel training materials, and some on-site administration

<table>
<thead>
<tr>
<th></th>
<th>Berkeley REALM Charter High</th>
<th>Berkeley REALM Charter Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Students</td>
<td>361</td>
<td>310</td>
</tr>
<tr>
<td>FRPM Eligibility</td>
<td>74%</td>
<td>74%</td>
</tr>
<tr>
<td>Transit Presence</td>
<td>9 AC Transit routes School within a mile of North Berkeley BART</td>
<td>9 AC Transit routes School within a mile of North Berkeley BART</td>
</tr>
<tr>
<td>Readiness</td>
<td>Unknown</td>
<td>Unknown</td>
</tr>
</tbody>
</table>

Planning, Policy and Legislation Committee
Central County Recommendations

Pilot program will test:

- Effectiveness in selected grades (due to large school enrollment)
- Sustainability of use during transition from middle to high school
  - John Muir Middle School
  - San Leandro High School

Central County – Pilot Program C

- Free transit pass on Clipper provides access to AC Transit services
- Free BART Orange and Red tickets upon request (limited to one per student per month)
- Limit to certain grades (8-10) to evaluate transition of program participants from middle to high school
Central County – Pilot Program C

- Approximately $554,000 for the cost of passes and administrative costs associated with Clipper set-up and school administration

<table>
<thead>
<tr>
<th></th>
<th>San Leandro High</th>
<th>John Muir Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Students</strong></td>
<td>2,600 (eligibility to be determined by grade)</td>
<td>962 students (eligibility to be determined by grade)</td>
</tr>
<tr>
<td><strong>FRM Eligibility</strong></td>
<td>72%</td>
<td>64%</td>
</tr>
<tr>
<td><strong>Transit Presence</strong></td>
<td>5 AC Transit routes (3 high frequency routes) San Leandro BART within a mile</td>
<td>2 AC Transit routes (1 high frequency route) San Leandro BART within a mile</td>
</tr>
<tr>
<td><strong>Readiness</strong></td>
<td>High</td>
<td>Moderate</td>
</tr>
</tbody>
</table>

Planning, Policy and Legislation Committee 31
South County Recommendations

Pilot program will test:
- Different fare media on multiple transit agencies
- Limited to specific grades due to size of school enrollment
  - Cesar Chavez Middle School
  - James Logan High School

South County - Pilot Program D

- Discounted transit passes available on either AC Transit or Union City Transit
- BART Orange and Red tickets upon request (limited to one per student per month)
South County – Pilot Program D

- Approximately up to $873,000 for the cost of passes and administrative costs associated with Clipper set-up and school administration

<table>
<thead>
<tr>
<th>Number of Students</th>
<th>James Logan High</th>
<th>Cesar Chavez Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td>(eligibility to be determined by grade)</td>
<td>3,911</td>
<td>1,283 (eligibility to be determined by grade)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FRPM Eligibility</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(area median of 35%)</td>
<td>40%</td>
<td>51%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transit Presence</th>
<th>Union City BART Station</th>
<th>Nearly all 11 of Union City Transit routes</th>
<th>Multiple AC Transit routes</th>
<th>Four Union City Transit routes</th>
<th>One AC Transit route</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Readiness</th>
<th>High</th>
<th>Moderate</th>
</tr>
</thead>
</table>

Planning, Policy and Legislation Committee
East County Recommendations

Pilot program will test:

- Two-tier subsidy using a universal pass
  - One tier to provide free transit passes for lowest income students
  - Second tier to provide discounted pass to all other students
- Use of flash pass versus Clipper card (to be available fall 2017)

  - East Avenue Middle School
  - Livermore High School

East County – Pilot Program E

- Discounted, means-based flash pass available to all students for use on LAVTA
- Students who qualify for FRPM would be eligible to receive transit pass for free
East County – Pilot Program E

- Approximately $681,000 for the cost of passes and administrative costs associated with Clipper set-up and school administration

<table>
<thead>
<tr>
<th></th>
<th>Livermore High</th>
<th>East Avenue Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Students</strong></td>
<td>1,771 students</td>
<td>623 students</td>
</tr>
<tr>
<td><strong>FRPM Eligibility</strong></td>
<td>24% (area median of 21%)</td>
<td>33% (area median of 21%)</td>
</tr>
<tr>
<td><strong>Transit Presence</strong></td>
<td>Two LAVTA routes</td>
<td>Four LAVTA routes</td>
</tr>
<tr>
<td><strong>Readiness</strong></td>
<td>Unknown</td>
<td>Unknown</td>
</tr>
</tbody>
</table>

Planning, Policy and Legislation Committee
Next Steps

- May 2016: Approval of pilot program sites

Following approval of site selection short list, actions will include but are not limited to:

- Finalize pass and administrative costs with transit operators
- Enter into agreements with applicable agencies
Next Steps

- Develop informational materials for students, including language translation and distribute to schools
- Identify and train on-site school administrators
- Design, create, print, and distribute passes
- Gather baseline data at recommended school sites
- Establish school site committees for ongoing outreach and communication

Recommendation

ACTAC unanimously approved this recommendation.

Recommendation to approve:
- Four pilot programs at eleven schools
- Shortlist of schools for expansion during the pilot program period (list of 36 schools)
- Alameda CTC prepares and enters into agreements and contracts to implement program for Fall 2016/2017 school year
Moving Forward

• Fall 2016: Pilot program implementation begins
• Summer 2017: Year One evaluation
• Summer 2018: Year Two evaluation
• Summer 2019: Year Three evaluation, and final recommendations

Thank you!