



Alameda County Affordable Student Transit Pass Program

State of the Practice Review

Technical Memorandum #1

FINAL

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STATE OF THE PRACTICE REVIEW

INTRODUCTION

This memorandum presents seven case studies of student transit pass programs, five of which were conducted by Nelson\Nygaard, and the remaining two by Alameda County Transportation Commission (Alameda CTC) staff. The studies include multiple themes, including pass features and distribution, the application of technology, funding sources, performance measures and evaluation. The programs included in this review were selected based on their relevance to the Affordable Student Transit Pass Program (Affordable STPP) study, and approved by Alameda CTC staff. The information presented in this memorandum will support the general framework for the design and implementation of the Affordable STPP.

In preparation for this review, the project team prepared a list of potential case study programs related to student transit passes and collected basic data and program parameters for each of the programs on the list. Based on further review and feedback from Alameda CTC staff, five programs were selected as case studies. Nelson\Nygaard staff spoke with program administrators and oversight staff at transit agencies and school districts representing each of these five programs.

These programs, which are discussed in this memorandum, are as follows:

- Baltimore, Maryland S-Pass
- Minneapolis, Minnesota Go-To Student Pass
- New York Student MetroCard
- Portland, Oregon YouthPass
- Washington D.C. Student Transit Subsidy Program

These include both multi-agency programs and those that are limited to a single transit agency. The programs also vary in their availability to students of different socio-economic backgrounds. Some of the key findings of the best practice review include:

- Program administration by school system improves student education and participation.
- Designating a student transit pass administrator at each school allows students to easily ask questions and troubleshoot program problems.
- Involving school students, faculty, and staff in decision-making on transit pass cost, eligibility, and time constraints creates a sense of ownership and increases program participation.
- Programs need to accommodate students who move or change schools and no longer meet the eligibility requirements based on home location.

- Integrating the transit pass with student photo IDs makes the passes easy to use for students and helps to prevent fraud.
- Presentations to 8th graders in the spring are a good way to introduce the program to students who will attend high school the following school year and become eligible for the program over the summer.
- Extending the hours of eligibility for using transit passes allows students to have greater opportunity to remain at school for academic programs, sports, and other activities after the regular school day.
- Ridership and use data should be made available to program coordinators.
- A significant proportion of transit trips by pass users are for non-school related activities, thus increasing the value of the program.
- It is optimal to have a dedicated funding source(s) to ensure the longevity of the program versus a single lump sum of investment.
- Increasing capacity constraints are more difficult for a transit operator to predict than lost revenue.
- Student transit pass programs should work with the Truancy Department at school district levels in order to enhance program effectiveness.
- At least one program reports it has not received complaints about overcrowding that is attributed to the program, and there has been no resultant increase in graffiti or defacement of transit vehicles.

The case studies are described in the following sections.

BALTIMORE, MARYLAND: S-PASS PROGRAM

The Maryland Transit Administration (MTA) Student Transit Pass program (S-Pass) provides unlimited rides on public buses, light rail, and heavy rail vehicles to approximately 34,000 of the 84,000 students enrolled in public middle schools and high schools throughout the City of Baltimore. S-passes are administered by the Baltimore City Public School (BCPS) system and jointly funded by BCPS and the MTA. S-Passes are distributed in the form of magnetic ticket passes with a unique serial number, which allows them to be tracked, deactivated and replaced when lost. Students must be under 21, attend public middle or high school within the City of Baltimore, and live at least 1.5 miles from their school in order to be eligible for the program.

Development and Implementation

The S-Pass program was developed to provide a more technologically advanced alternative to a paper ticket-based free student pass program that had been around since the inception of the MTA in April of 1970. Per state statute, BCPS is required to provide free transit passes to its public middle and high school students on account of the fact that it does not provide school bus service. Before the S-Pass program, students were issued two paper tickets per day, which were only eligible for use between 6:00 a.m. and 6:30 p.m. When the MTA proposed the shift to a magnetic ticket, BCPS students, faculty, and administrators successfully pushed for extending the program's hours and unrestricting the number of permissible rides, to accommodate students' varied academic schedules, which include afterschool programs, jobs, internships, and volunteer activities.

The S-Pass began as a one-semester pilot program in January of 2013, during which five schools participated. In August of 2013, the S-Pass program was rolled out for all public middle and high schools throughout the City of Baltimore. It is currently in its third full year.

While all student passes are distributed by the MTA, the Baltimore City Public School system is responsible for administering the program itself. Every eligible public school has a designated S-Pass administrator on staff to distribute the passes to students enrolled in the program and to troubleshoot problems as they arise. At the beginning of the school year, the S-Pass administrator is provided with a list of every student at the school who is eligible to receive an S-pass. Every month, the MTA provides the S-Pass administrator with a monthly pass for each eligible student. It is then incumbent upon the student to obtain his or her monthly S-pass from the school's S-pass administrator at the beginning of each month.

The S-Pass was developed by the Maryland Transit Administration as an interim step between the paper tickets issued prior to the 2013-2014 academic year and a fully integrated electronic student ID card that will provide eligible students access to their school building, local public transit, and their school's library and free/reduced-price lunch program. This integrated card is currently in development, with the expectation that it will be rolled out in the coming years.

Eligibility and Structure

Baltimore students qualify for an S-Pass if they meet the following criteria:

- Student is enrolled in a Baltimore City Public School high school or middle school (including all charter schools)
- Student is 21 years-old or under
- Student lives more than 1.5 miles from their school

Students who meet the eligibility requirements are included on a list that is distributed to each school's S-Pass administrator, which then allows that student to receive a monthly S-Pass from their school, entitling them to free unlimited rides on all Baltimore public transportation between the hours of 5:00 a.m. and 8:00 p.m., Monday through Friday.

S-Passes are issued on a magnetic fare card similar to a BART ticket, but with the eligible month and year on one side (Figure 0-1). The cards work by swiping them through the fare box of a local bus, inserting them in the fare gate of a subway station, or presenting them to a light rail vehicle operator. To verify eligibility, students are required to present both their S-Pass and student ID card when stopped by a fare inspector.

Figure 0-1 Maryland Transit Administration Student Transit Pass (S-Pass)



Source: mta.maryland.gov

The cost of running the S-Pass program is incurred by both the Baltimore City Public School system and the Maryland Transit Administration. Under state law, every Maryland school district is responsible for providing and funding transportation services for its students.¹ In Baltimore, the school district pays the MTA the equivalent of two one-way rides per student per school day, as well as a \$50,000 administrative charge and a monthly lost ticket penalty of \$5 per ticket beyond the first 300. During the 2014-2015 school year, this cost amounted to \$5.2 million. This payment did not include nearly 2 million additional student trips, 223 additional weekly operating hours, 2,120 additional vehicle miles traveled, and 63 additional peak vehicles. In 2014-2015, these additional costs amounted to an additional \$10.3 million, subsidized by the MTA.

Students who do not meet the criteria to qualify for an S-Pass are still eligible for discounted fares on Baltimore’s public transportation system with an MTA student identification card. These cards are also distributed through the school, but are accepted at more limited hours and only qualify the student for single fares at a reduced cost. These fares amount to \$1.20 per ride and are consistent on all Baltimore public transit vehicles, with the exception of Express Buses, which cost an additional \$0.40 a ride. Student ID cards allow students to ride for the discounted rate between the hours of 6:00 a.m. and 6:30 p.m., which is indicated on the card. Night school students are eligible for reduced fares between 6:00 p.m. and 11:00 p.m. A comparison of Baltimore student fares and adult fares is shown in the chart below (Figure 0-2).

Figure 0-2 Maryland Transit Administration One-Way Fares

| Fare Type | Adult | Student* (Discount) |
|-----------------------------|--------|---------------------|
| Local Bus | \$1.70 | \$1.20 (71%) |
| Light Rail | \$1.70 | \$1.20 (71%) |
| Metro Subway | \$1.70 | \$1.20 (71%) |
| Express Bus (with Upcharge) | \$2.10 | \$1.60 (76%) |

¹ Code of Maryland 13A.06.07 Student Transportation, Sections 2-205, 5-205 and 8-410

*Student = Grades K-12

Lessons Learned

- If the funding and technology is available, it is ideal for the student transit pass to be electronic and fully integrated with other benefits.
 - Prevents fraud
 - Improves data analysis
 - Reduces misplacement/loss rate (if integrated with student ID or other important uses)
 - Helps to identify when students are truant (if they use their card frequently during the school day)
 - Helps transit agency determine where to increase/decrease service
 - Allows for more accurate billing (if transit agency bills schools per student ride)
 - Generates additional revenue (due to increased accountability)
- Program administration by school system improves student education and participation.
- Dedicated student transit pass administrator at each school allows students to easily ask questions, troubleshoot program problems.
- Involve school students, faculty, and staff in decision-making on pass cost, eligibility, and time constraints to create sense of ownership, increase program participation.
- Students will take advantage of free transit pass at every opportunity.
 - When the MTA extended its program hours and number of rides, student ridership increased significantly
 - Increased ridership necessitates strict enforcement of program hours and eligibility.
 - Program administrator should make sure that transit agency is prepared for ridership increase throughout time that passes are eligible (especially when passes are extended beyond regular school hours).
- Transit agency and school system should clearly define program roles, responsibilities, and financial obligations before program is implemented.

MINNEAPOLIS, MINNESOTA: GO-TO STUDENT PASS

The Go-To Student Pass Program provides unlimited rides on city bus and light rail to approximately 6,500 students enrolled at high schools in the Minneapolis Public Schools system. The passes, which are valid for use between 5:00 a.m. and 10:00 p.m. offer students increased scheduling flexibility to remain at school for afterschool programs and provide improved access to jobs, internships, and community organizations.

Development and Implementation

The program was first developed to provide an alternative to traditional yellow school buses for the school district's summer semester programs. As many of the district's summer programs are centrally located, the district found that it would be more efficient and less costly to provide students with transit passes in lieu of contracting yellow bus service for the summer months. Based upon positive feedback from students and parents, a full-year pilot program was introduced for the 2011-2012 school year. Following a successful pilot period, the school district worked closely with the local transit service provider Metro Transit to roll out the program to high

schools citywide. In addition to the feedback provided by pilot program participants, the Minneapolis Downtown Improvement District provided input during the development process given the program’s likelihood of increasing student trips to the downtown area.

In order to facilitate the implementation of the program at ground level, each high school has a Check & Connect staff member that dedicates about eight to ten hours a week coordinating the Go-To Student Pass program at a specific school. The Check & Connect program was created by Minneapolis Public Schools in an effort to boost student retention and academic achievement for students at risk of dropping out through increased student engagement. In addition to their daily roles, which include academic tutoring, acting as a liaison between students and community services, and monitoring grades and attendance, Check & Connect staff provide multilingual face to face support for the Go-To Student Pass program on Minneapolis Public Schools high school campuses. Check & Connect staff are responsible for the distribution of Go-To Student Passes, replacement of lost passes, and the sale of passes to students who do not qualify for a free pass.

Eligibility and Structure

Students who are enrolled in a Minneapolis Public School high school and meet one of the following criteria qualify for a Go-To Student Pass free of charge:

- Students who live within the school's attendance zone² or are enrolled in a city-wide program and live outside the school’s two-mile walk zone
- Students who qualify for free/reduced lunch and live inside their schools’ two-mile walk zone

Students who meet the eligibility criteria are notified by mail in August before the start of the school year with instructions on how to pick up their Go-To Pass on campus the week before school begins. Upon retrieval of the pass, both students and parents are asked to sign a transportation code of conduct issued by Metro Transit. Students who do not meet the above criteria to qualify for a free pass may purchase one at a discounted rate from the Check & Connect office at their school. At a cost of \$75 per quarter or \$300 for the entire year, purchase of the pass provides a significant level of discount over standard one-way adult fares and 31-Day multi-day passes if used for one school bound and one home bound trip each school day (see Figure 0-3). Metro Transit’s 31-Day passes, which allow for unlimited rides like the Go-To Student Pass, cost between \$59 and \$113.50 depending on service type.

Figure 0-3 Metro Transit One-Way Fares

| Fare Type | Adult | Youth* (Discount) |
|---------------------------|--------|-------------------|
| Bus/METRO Light Rail | \$1.75 | \$0.75 (57%) |
| Express Bus | \$2.25 | \$0.75 (67%) |
| Bus/METRO Light Rail Peak | \$2.25 | \$2.25 |
| Express Bus Peak | \$3.00 | \$3.00 |

*Youth = Ages 6 to 12.

² The Minneapolis School District is divided into three zones, which dictate student attendance prioritization and transportation options. The process differs between K-8 and high schools, but both allow students to attend a school outside of their zone.

Go-To Student Passes are issued on a durable plastic electronic fare card similar to Metro Transit's other Go-To Passes (see Figure 0-4), or a Clipper card, but with a full photo student ID on one side. The cards work by tapping them to a fare reader upon boarding a bus or train, while also serving as the student's ID for any school related uses. In addition to the ease of use and simplicity that combining the two cards brings, incorporating a photo ID with the pass was seen as a key measure to prevent fraud.

Figure 0-4 Go-To Student Pass Fare Card



The primary cost of running the program is borne by Minneapolis Public Schools which pays Metro Transit \$300 for each student that qualifies for and receives a free pass. Beyond the cost of the passes, administration costs which cover coordinator salaries, pass distribution, and outreach are between \$100,000 and \$150,000 a year.

Lessons Learned

- Accommodate students who move or change schools and no longer meet the eligibility requirements based on home location.
- Integrating the transit pass with student photo ID's makes the passes easy to use for students and helps to prevent fraud.
- Dedicated Check & Connect staff allows distribution and replacement of passes to happen face-to-face at schools.
- It is important to have program coordinators, like Check & Contact staff, that are capable of answering questions from parents and students in other languages prevalent in the local population.
- Use the program as a tool to help students stay in a school that they have moved away from or attend a school in another part of the city that may increase their academic opportunities given different curricula or areas of focus at certain schools.
- Presentations to 8th graders in the spring are a good way to introduce the program to students who will attend high school the following school year and become eligible for the program over the summer.
- The flexibility of transit service allows students to have greater opportunity to remain at school for academic programs, sports, and other activities after the regular school day.
- The program has resulted in improved student attendance and retention.

- Based on the success of the Go-To Student Pass in Minneapolis, the public school district in neighboring St. Paul is currently working with Metro Transit to develop a Go-To Student Pass pilot program for St. Paul Public Schools.
- Findings from 2015 Metropolitan Council’s “Assessing the Impacts of Student Transportation on Public Transit” Report:
 - **Education.** Pass access led to lower student truancy rates (23% lower absenteeism for users) and provided more educational opportunity for students, leading to higher academic performance (GPA scores were 0.28 higher for pass-carrying students who attended after-school activities).
 - **Economy.** Metro’s Transit’s Student Pass-related deficits decreased from \$468,022 in 2012-2013 to \$157,828 in 2013-2014. This significant cost savings can be attributed to service adjustments by Agency, as Metro Transit adjusted service to accommodate 75% ridership among participants, versus 100% the previous year.
 - **Satisfaction.** Both Pass users and their parents reported having more positive perceptions of transit service compared to non-Pass users. 81 percent of Pass users and 80 percent of parents reported being either “Satisfied” or “Very Satisfied” with the Pass. 93 percent of Pass users and 85 of parents reported benefiting from the Pass.
 - **Ridership.** Students who used the Pass to get to school and to access after-school programs and other extra-curricular activities reported to be more likely to use transit after graduating from high school than their peers.
 - **Safety.** A higher percentage of female students reported negative perceptions related to safety while waiting for buses/trains at stops, walking to/from bus/train stops and traveling on bus/trains compared to male students. In addition, the odds of female respondents strongly agreeing that transit is safe to use was 0.53 times lower compared to male respondents.
 - **Environment.** Pass usage led to significant annual emission reductions (93% reduction in Nitrogen oxide emissions, 89% reduction in particulate matter emissions, 59% reduction in carbon monoxide) and vehicle miles traveled savings (158,400 miles from buses and 2,038,784 from personal vehicles).
 - **Equity.** Program benefits and pass usage was most notable for students who were Black, foreign-born, eligible for the free/reduced-priced meal program, and/or children of single parents. In contrast, pass usage and benefits were comparatively low for Asian, Latino, and Native American students.

NEW YORK, NEW YORK: STUDENT METROCARD

The Student MetroCard program provides free or half-priced travel between home and school on New York City buses and subways for approximately 544,000 students. The program, which covers grades K-12, offers 17 different types of student travel passes on the basis of grade level and distance eligibility criteria.

Development and Implementation

Under the management of the New York City Department of Education, Office of Pupil Transportation (OPT), New York City has had a student transit pass program in some form since the 1980s. As prescribed by New York State Law, school districts are not responsible for providing

full fare transportation for students living within a certain distance of school. Distance thresholds established for public schools in New York City are represented in

Figure 0-5 below.

Figure 0-5 NYC General Education Stop-To-School Busing Eligibility

| Grade | Distance from Residence to School | | | |
|-------|-----------------------------------|--|--|--|
| | Less than ½ Mile | ½ Mile or More, but Less than 1 Mile | 1 Mile or More, but Less than 1½ Miles | 1½ Miles or More |
| K-2 | Not Eligible** | Eligible for Free ("Full-Fare") Transportation | | |
| 3-6 | Transportation Not Provided | Eligible for Free ("Full-Fare") Transportation | | |
| 7-12 | | Not Eligible** | | Eligible for Free ("Full-Fare") Transportation |

** Students in these categories are not eligible for free or full-fare transportation. They may receive a half fare student MetroCard good for use on buses only.

For students who qualify for full-fare transportation (free travel), the criteria can be met by either a school providing contracted yellow bus service or provision of a free transit pass. In a city with heavy congestion and a robust transit network like New York City, many schools have opted into the Student MetroCard program in lieu of providing yellow school bus service.

Today the Student MetroCard program is operated as part of a three party agreement between the New York City Department of Education, State of New York, and the Metropolitan Transportation Authority (MTA) to provide \$45 million in value per year in investment or service each towards student travel between home and school (not adjusted for inflation). Day to day implementation of the program is largely handled by the Office of Pupil Transportation (OPT), which ships applicable MetroCards to schools at the start of each school year based on the size of their enrollment and eligibility of students. Each participating school designates a member of staff or a parent to work with OPT as a program coordinator, helping to replace lost or stolen cards and explaining eligibility requirements. As staff resources are limited, outreach efforts are limited to explanatory pamphlets produced by the MTA.

Eligibility and Structure

Eligibility for the Student MetroCard program is determined solely on the basis of a student’s grade level and distance between their home and school; there is no consideration of income or economic circumstances. Issuance of a full-fare versus half-fare student MetroCard is as follows:

- **Full Fare** – Any student who is eligible for full-fare transportation may be issued a full fare Student MetroCard if that student requests a card or if yellow bus transportation is not provided for that student.
- **Half Fare** – Students not eligible for full-fare transportation may be issued a half-fare Student MetroCard. Half fare MetroCards are provided as a courtesy by the MTA and are good for use on buses only.

Student MetroCards are distributed automatically to qualified students by each school’s program coordinator, eliminating the need for students to apply for a pass. Given the wide range of student

travel needs and specialized school programs in a city the size of New York, the program utilizes 17 different student passes with varying restrictions of use to accommodate different groups of students such as those who attend weekend academies, night school, work-study programs, and unpaid internships (use for paid internships is restricted). Restrictions of use for standard Student MetroCards are outlined below:

- Only for use by the student to whom it was issued and whose name is written on the card.
- Good for travel to and from school and school-related activities between 5:30 a.m. and 8:30 p.m., only on days when the student’s school is in session.
- Good for three trips each school day. Three trips allows a student to travel to school, from school to an afterschool activity, and then from that activity to home. A special four-trip Student MetroCard is available on request for pupils whose trip to school requires multiple transfers.
- Valid during school semester only.

Student MetroCards are issued on paper electronic stripe fare cards similar to that of regular MTA MetroCards (or a BART ticket) with varying designs for different grade levels (see

Figure 0-6 **Error! Reference source not found.**). The decision to provide different colored cards for different grade levels was made to prevent older students from stealing the cards of younger students.

Figure 0-6 Full fare Student MetroCards for grades K-6 (left) and grades 7-12 (right)



Shown in Figure 0-7 **Error! Reference source not found.** below are the levels of discount provided by Student MetroCards compared to standard MTA fares. Students with half fare Student MetroCards are required to pay the difference out of pocket at the farebox after swiping their card.

Figure 0-7 MTA One-Way Fares

| Fare Type | Adult | Half Fare Student MetroCard (Discount) | Full Fare Student MetroCard(Discount) |
|-----------|--------|--|---------------------------------------|
| Local Bus | \$2.75 | \$1.35 (68%) | Ride for Free (100%) |
| Subway | \$2.75 | \$2.75 (0%) | |

Lessons Learned

- Involve schools and parents in development discussions – how much of existing travel to school can be supplanted by transit?
- Avoid changes to student eligibility based on their age or grade level.
- Integrate a photo ID with the pass in order to prevent fraud.
- Make ridership and use data available to program coordinators.
- Consider that additional student riders may lead to crowding on a.m. peak services.

PORTLAND, OREGON: YOUTHPASS PROGRAM

The YouthPass Program provides unlimited rides on all TriMet services including buses, MAX Light Rail, WES Commuter Rail, and the Portland Streetcar to approximately 13,000 students enrolled at high schools in the Portland Public Schools system. The program, which is free of charge to all high school students, allows Portland Public Schools student ID cards to function as unrestricted transit cards for the length of the school year.

Development and Implementation

Unlike many other school districts in Oregon, Portland Public Schools does not provide yellow school bus service for high school students. Starting as a pilot program in the 2008-2009 school year, the YouthPass Program was created in order to provide a free transportation option for low-income students (those who qualify for free or reduced-price lunch). The program was initially funded by a State of Oregon Business Energy Tax Credit, known as BETC. When the tax credit was eliminated in 2011, the school district, City of Portland, and local transit provider TriMet were tasked with developing a funding strategy to continue the program. Upon arriving at an agreement to split the cost of the program in thirds between the three parties, the decision was made to expand eligibility for the program to all Portland Public School students attending high schools regardless of economic background or home location. Overall, the program costs approximately \$3 million per year to operate, which is split evenly between TriMet (recognized as lost revenue), Portland Public Schools, and the City of Portland. The program cost was calculated based on the amount of revenue lost when TriMet shifted from a discounted student pass to a free pass. Additional bus service operated to accommodate the increase in student ridership is not incorporated into this cost.

Implementation of the program is primarily handled by TriMet, with schools responsible for distribution of student ID cards. School campuses are seen as the main point of communication to students, with TriMet staff involved in presenting at school assemblies. Because a majority of students already use TriMet before qualifying for the program, outreach efforts are largely focused on safety and rider etiquette. During the development of the program, a commission of student representatives from different schools was organized in order to identify ways to best communicate with students.

Eligibility and Structure

All students enrolled at a Portland Public Schools high school automatically qualify for the YouthPass program free of charge. Unlike other programs which provide students with transit fare cards, Portland Public Schools insert a TriMet logo into the photo ID of high school students. This method, which was originally achieved through a TriMet sticker affixed to an ID (see Figure

0-8Error! Reference source not found.), allows students to board any TriMet vehicle for free during the school year by simply showing their student ID card. This method was selected for its ease of implementation and use, in addition to the difficulty it presents for duplication, as a means to prevent fraud. Portland Public School IDs for high schools with a valid TriMet logo are honored for unlimited rides without time or day restrictions as long as travel occurs during the academic year.

Figure 0-8 School ID with TriMet YouthPass Sticker



Source: portlandafoot.org

Because there are a number of high schools in both the City of Portland and the metropolitan area that are not part of the Portland Public Schools district, and thus not eligible for the program, TriMet made the decision to extend eligibility for TriMet youth fares and passes to age 17 and all students enrolled in high school or pursuing a GED. Shown in Figure 0-9 below, TriMet’s youth fares provide a level of discount at or above 50% of standard adult fares.

Figure 0-9 TriMet Transit Fares

| Fare Type | Adult | Youth* (Discount) | Portland Public High School** (Discount) |
|---------------------|----------|-------------------|--|
| 2 ½ - Hour Ticket | \$2.50 | \$1.25 (50%) | Ride for Free (100%) |
| 1-Day Pass | \$5.00 | \$2.50 (50%) | |
| 7-Day Pass | \$26.00 | \$7.50 (71%) | |
| 14-Day Pass | \$51.00 | \$14.50 (72%) | |
| 30-Day/1-Month Pass | \$100.00 | \$28.00 (72%) | |

*Youth = Ages 7–17 and students in high school or pursuing a GED. Proof of age or student status required. Children 6 and under ride free with paying passenger

** High school students in the Portland Public School District can ride TriMet for free during the school year by showing their student ID

Lessons Learned

- Approximately half of transit trips made by participating students are for travel between home and school; allowing for non-school related travel increases the value of the program.
- Scale goals to available or feasible levels of funding.
- It is optimal to have a dedicated funding source(s) to ensure the longevity of the program versus a single lump sum of investment.
- Increasing capacity constraints are harder for a transit operator to predict than lost revenue; try to consider how an increase in student travel may inconvenience existing regular transit riders.
- Consider student co-pay if a fully subsidized pass is not feasible.
- Clearly define the goals of the program – is it to get students to school? Improve equity? Encourage active transportation and transit use?

WASHINGTON, D.C. SCHOOL TRANSIT SUBSIDY PROGRAM

The District Department of Transportation (DDOT) Student Transit Subsidy Program provides free or reduced price rides for students at Washington, DC schools who ride Metrobus, the DC Circulator or Metrorail when traveling to and from school or participating in school-related activities. The program serves around 16,000 students a year, which is approximately 2% of total transit system ridership. Roughly 12,000 of these students ride the bus on any given day, versus 4,000 who ride the rail system. The program is administered by DDOT with significant support from the Washington Metropolitan Area Transit Authority (WMATA), the Office of the Chief Technology Officer (OCTO), the DC Office of the Deputy Mayor for Education (DME), and the City's public and charter school systems. It is funded entirely by DDOT and open to all DC public and charter school students who are residents of DC and under 22 years of age. The student transit subsidy is updated to students' DC One card, which also serves as their student identification card.

Development and Implementation

The Student Transit Subsidy Program is broken down into three sub-programs: Kids Ride Free on Bus, Kids Ride Free on Rail, and a discounted student pass program that is a remnant from before the implementation of the Kids Ride Free programs. The Kids Ride Free on Bus program was first implemented in the fall of 2013 after being championed by then-DC Councilwoman Muriel Bowser. After winning the 2014 mayoral election, Mayor Bowser expanded the student transit program to include Kids Ride Free on Rail in the fall of 2015. The program was developed to supplement the lack of a traditional school bus system in the District, and was boosted by research indicating that the lack of affordable and convenient transportation is a major barrier to student attendance.

The program was implemented by DDOT in partnership with OCTO and the DC Public School system. OCTO is the agency responsible for managing the logistics of integrating the transit pass with the City's DC One card, while the DC Public School system designates a School ID Administrator at each DC public school who is responsible for issuing integrated student ID/transit passes and troubleshooting any issues that arise throughout the process.

Eligibility and Structure

Students qualify for the Kids Ride Free on Rail program if they meet the following criteria:

- Student is a resident of the District of Columbia
- Student is enrolled in a DC public school or public charter school
- Student is between the ages of 5 - 21

Students qualify for the Kids Ride Free on Bus program if they meet the following criteria:

- Student is a resident of the District of Columbia
- Student is enrolled in a DC public, public charter, private, or parochial school, or is homeschooled within the District
- Student is between the ages of 5 - 21

Students qualify for a discounted student transit pass if they meet the following criteria:

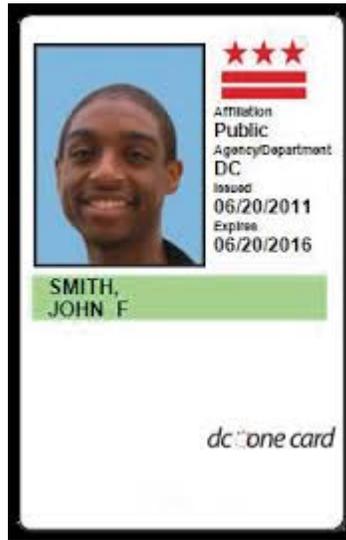
- Student is a resident of the District of Columbia
- Student is enrolled in a DC public, public charter, private, or parochial school, or is homeschooled within the District
- Student is between the ages of 5 - 21

There are differences between all three transit subsidy programs offered to DC students in terms of eligibility, cost, and time and geographic restrictions. The Kids Ride Free on Rail program is not restricted by time or day, but boardings and alightings are restricted to Metrorail stations within the City's boundaries. While the Kids Ride Free on Bus program is offered to a wider range of students on all Metrobus and DC Circulator routes in the DC region, it is limited to the hours of 5:30 a.m. – 9:00 a.m. and 2:00 p.m. – 8:00 p.m. during the weekday and only while school is in session. Both the Kids Ride Free on Rail and the Kids Ride Free on Bus programs offer a 100% transit subsidy for eligible students.

The discounted student transit pass has the same eligibility requirements as the Kids Free on Bus program, but costs \$7.50 for a 10-trip bus pass, \$9.50 for a 10-trip bus pass, and \$30 for an unlimited monthly bus and rail pass. This program is primarily used by private school students who prefer to ride Metrorail and for public and charter school students who want to ride the bus outside of the designated Kids Ride Free on Bus hours.

All three types of transit subsidies are applied to a student's DC One card, which is a durable electronic card that provides DC students and residents access to a wide range of government facilities and programs, including public schools, public libraries, and city-run recreation centers (see Figure 1-9). The card works by hovering it over a Metrorail station fare gate or Metrobus or DC Circulator fare box.

Figure 0-10 DC One Card



Source: www.kippdc.org

DC One cards are issued to students by the school at the time of their enrollment. They are distributed by the school's Student ID Administrator and provide students access into the building and other school-related benefits. In order to take advantage of the Student Transit Subsidy Program, students must actively register for the program. The student must first apply to the program online, and if approved, DDOT will electronically load the subsidy onto their DC One Card, which generally takes one to three business days. If students are ever stopped by a fare inspector on public transit and asked to provide proof of payment, they need to present their DC One card to the inspector, who can verify their subsidy electronically.

DC's Student Transit Subsidy Program is funded entirely by the DC Department of Transportation. For the 2015-2016 school year, this amounted to \$18.6 million, which includes the Kids Ride Free on Rail program for the first time in the program's history. WMATA does not subsidize the program to avoid a perception of favoritism, since Maryland and Virginia students do not receive program benefits despite the fact that all three jurisdictions contribute to Metro's annual budget. While Metro does not pay into the program, it does run a series of school routes and operates additional buses along existing routes to accommodate the increased ridership that results directly from the Student Transit Subsidy Program.

Lessons Learned

- Determine the overarching goal of the program before implementation.
- If the funding and technology are available, it is ideal for the student transit pass to be electronic and fully integrated with other benefits.
 - Prevents fraud (especially parents who use student passes when child is not riding Metro)
 - Reduces misplacement/loss rate (when integrated with student ID and other essential uses)
- If using an electronic transit pass, make sure the “kinks” are worked out before implementation.

- DC One card is rejected when card has negative balance, even when loaded with free transit subsidy
- A dedicated student transit pass administrator at each school allows students to easily ask questions and helps to troubleshoot program problems.
- Coordinated outreach at schools, train stations, and bus stops before and during the program roll-out increases student education and participation in the program.
- Involve school students, faculty, and staff in decision-making on pass cost, eligibility, and time constraints to create a sense of ownership and increase program participation.

BAY AREA PROGRAMS

In addition to the five case studies conducted by Nelson\Nygaard, Alameda CTC provided information on two Bay Area programs, the Western Contra Costa Transportation Advisory Committee (WCCTAC) Student Bus Pass Program (SBPP), and the San Francisco Municipal Transit Agency (Muni) Free Muni Bus Pass Program. Highlights of those programs are described below.

WCCTAC Student Bus Pass Program

The Student Bus Pass Program (SBPP) is a collaborative program between the West Contra Costa Transportation Advisory Committee (WCCTAC) and the West Contra Costa County Unified School District (WCCUSD), and the program has been in operation since 2010. The program is funded through Measure J, a ½-cent sales tax that was approved by the voters of Contra Costa County in 2009. The program was established to decrease truancy and to better connect students to after-school sports, clubs, and jobs. The school district expects the program to increase average daily attendance.

The SBPP uses paper passes, although plans to use Clipper Cards in the future. Paper applications and brief surveys are distributed to students at the school sites during orientation. Low-income students, who are defined as students who are eligible for Free and Reduced Lunch (FRL), receive their transit passes for free. Each school has a database of students enrolled in FRL. If the school is designated a Provision II school (90% eligibility), the entire school is enrolled. Six comprehensive high schools and one charter school are enrolled in the program, serving 9,000 high school students. By the second year of the program, participating students were familiar with the process and there was no need to “chase down” applications. Five percent of administration fees are provided to the schools directly from Measure J funds. WCCTAC is currently participating in a pilot program with AC Transit to promote and increase Clipper Cards for youth. WCCTAC is planning to expand the program into the summer months.

Lessons Learned

- Delay in payment to AC Transit causes delays in distribution of paper monthly passes.
- The program has concerns that the passes are being fraudulently used.
- An inventory of card numbers should be maintained.
- Student transit pass programs should work with the truancy department at school district levels.

- Cards should be distributed simultaneously with text book distribution.

SF Muni Free Bus Program

San Francisco Muni offers a free transit pass via a Clipper Card to the approximately 48,000 low- and moderate-income students aged 5 to 18 who are residents of San Francisco. In order to be eligible for the program, students must reside in a household with a gross annual family income that is at or below 100% of the Bay Area Medium Income Level, which ranges from \$71,350 for a one person household to \$134,500 for a household of eight individuals. Income verification is based on the honor system.

In order to apply, students (or their parents) fill out an application and check a box indicating their family income and proof of age. Program administrators indicate that administrative costs are not high once enrollment has occurred. Applications are divided between those applicants who do and do not have Clipper Cards, as there is a different process for each group. For those with Clipper Cards, the process takes about three weeks, and for those without about five weeks. Students receive notices from the SFMTA Customer Service Center once their Clipper Cards have been loaded. After students are enrolled in the program they do not need to reapply as their passes are valid until age 19. Students receive the equivalent of a \$21 monthly Muni Pass, which is loaded onto the Clipper Card. Cards may only be replaced at two locations.

Lessons Learned

- About 1,000 cards have been confiscated since the start of program in 2014.
- Muni is exploring the possibility of integrating travel training into the program.
- Muni has not received complaints about overcrowding that is attributed to the program, and there has been no resultant increase in graffiti or defacement of Muni vehicles.
- The program recommends that schools submit applications that meet specific criteria in order to participate in the pilot program. This shows commitment and a desire by the school to be engaged for the long term.

CONCLUSION

Case studies illustrate that a variety of different approaches have been successful for implementation and administration of affordable student transit passes at a selection of transit agencies across the United States. Based on this review, four key considerations for the development of the program for Alameda County are identified: (1) having a local program administrator accessible within each of the schools where the program is piloted, (2) fully developing procedures for addressing card issuance, replacement, lost cards, identification, and serving students who move to or from the pilot area during program implementation, (3) testing the pilot program, including procedures and data collection, several months in advance of implementation, and (4) evaluating income and other needs-based criteria for issuance of free versus reduced-fare transit passes.

The next phase of the planning process includes a process for site selection, and then program parameters will be fully developed. Agencies that participated in this set of case studies may be

contacted for follow-up questions as this project advances to ensure the incorporation of best practices from these and other examples which have been documented by Alameda CTC in recent years.

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APPENDIX

| Program Name | City | # of Students Served | Eligibility | Day/Hours of Eligibility | Program Cost |
|------------------------|-----------------|----------------------|--|---|--|
| S-Pass Program | Baltimore, MD | 34,000 | < 21 years old Enrolled in a city public middle or high school Live > 1.5 miles from school | Monday - Friday, 5:00am - 8:00pm | \$5.2 million <i>(cost does not include additional \$10.3 million in service costs to accommodate student ridership)</i> |
| Go-To Student Pass | Minneapolis, MN | 6,500 | Live < 2 miles from school and are eligible for free/reduced price student lunch Live > 2 miles from school and within school attendance zone Live > 2 miles from school and enrolled in a city-wide program | 7 days/week, 5:00am - 10:00pm | \$2.1 million <i>(\$300/student + \$100k-\$150k in administrative costs; cost does not include additional bus services and branches to accommodate student ridership)</i> |
| Student MetroCard | New York, NY | 544,000 | <i>Full fare:</i> Live > 1 mile from school (grades 3-6) Live > 1.5 miles from school (grades 7-12) <i>Half fare:</i> Live > 0.5 miles from school (grades 3-6) Live > 1 mile from school (grades 7-12) | School days, 5:30am - 8:30pm (limited to 3 trips/day) | \$135 million <i>(cost does not include "special" bus routes and service increase to accommodate student ridership, or waivers that subsidize public school field trip rides)</i> |
| YouthPass Program | Portland, OR | 13,000 | Enrolled in a city public high school, 15-17 years old, or pursuing a GED | 24 hours/day, 7 days/week during school year | \$3 million <i>(cost does not include increase in service to accommodate student ridership)</i> |
| School Transit Subsidy | Washington, DC | 16,000 | 5-21 years old City resident | <i>Rail program:</i> 24 hours/day, 7 | \$18.6 million <i>(cost does not include ten</i> |

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| | | | | | |
|---------|--|--|---|---|---|
| Program | | | Enrolled in a city public or public charter school (private school students are eligible for free bus transit only) | days/week <i>Bus program:</i> Monday - Friday, 5:30am - 9:00am, 2:00pm - 8:00pm | <i>"school routes" at an annual cost of \$10 million, or additional service increase to accommodate student ridership</i> |
|---------|--|--|---|---|---|