



GoTriangle
Board of Trustees
February 28, 2024
12:00 pm-2:30 pm Eastern Time

The GoTriangle Board of Trustees has resumed in-person meetings. The public is encouraged to use the remote option.

Microsoft Teams meeting | Join on your computer or mobile app

Click here to join the meeting

*Or call in (audio only) +1 252-210-4099
Phone Conference ID: # 636 348 697#*

I. Call to Order and Adoption of Agenda

(1 minute Brenda Howerton)

ACTION REQUESTED: Adopt agenda with any changes requested.

II. Public Comment

(Brenda Howerton)

The public comment period is held to give citizens an opportunity to speak on any item. The session is no more than thirty minutes long and speakers are limited to no more than three minutes each. Speakers are required to sign up in advance with the Clerk to the Board at mdawson@gotriangle.org.

III. Consent Agenda

(1 minute Brenda Howerton)

Items listed on the consent agenda are considered as a single motion. At the request of any Board member, or member of the public, items may be removed from the consent agenda and acted on by a separate motion. Items pulled from the consent agenda will be placed at the beginning of the general business agenda for discussion and action. Any Board member wishing to remove an item from the consent agenda should advise staff in advance.

ACTION REQUESTED: Approve consent agenda.

A. Regular Session Minutes | January 24, 2024

B. Unsealing of Closed Session Minutes

C. FY2024 Q3 Transit Plan Amendments

AUDIT & FINANCE RECOMMENDATION: Approve the three county transit plan amendments and adopt the budget ordinance amendments.

1. Wake County Transit

O 2024 0002 | Wake Capital Fund Budget Ordinance
Amendment

Budget Change Impact

2. Durham County Transit

O 2024 0003 | Durham Operating Fund Budget Ordinance
Amendment

O 2024 0004 | Durham Capital Fund Budget Ordinance
Amendment

Budget Change Impact

3. Orange County Transit

O 2024 0005 | Orange Operating Fund Budget Ordinance
Amendment

O 2024 0006 | Orange Capital Fund Budget Ordinance
Amendment

Budget Change Impact

D. Vanpool Contract and Subsidy

OPERATIONS RECOMMENDATION: Award a contract to Enterprise Leasing Company - Southeast, LLC from February 2024 through FY27 for a maximum of \$1,800,000, authorize the President/CEO to execute a contract consistent with those terms and increase the monthly subsidy not to exceed 30% of the cost to commuters, for a maximum of \$600 per vanpool.

E. Wake Bus Stop Property Acquisition

PLANNING RECOMMENDATION: Authorize staff to conduct early outreach and acquire the property interest needed for GoTriangle bus stop improvements in Wake County at new and existing stop locations listed.

F. Durham Bus Stop Property Acquisition

PLANNING RECOMMENDATION: Authorize staff to conduct early outreach and acquire the property interest needed for GoTriangle bus stop improvements in Durham County, on behalf of the City of Durham, at existing stop locations attached.

Dur bus stop locations

Dur acquisition process

IV. General Business Agenda

Items listed on the general business agenda are for discussion and possible action. Such designation means that the Board intends to discuss the general subject area of that agenda item before making any motion concerning that item.

A. Items Removed from the Consent Agenda

(1 minute Brenda Howerton)

ACTION REQUESTED: Discuss and take action on any items removed from the consent agenda.

B. Audit & Finance Committee Report

(5 minutes Susan Evans)

1. Return to Fares

(15 minutes Michelle Peele, Steve Schlossberg)

AUDIT & FINANCE RECOMMENDATION: Approve returning to fares and implementing expanded GoPass opportunities, to ensure affordability and accessibility as fares are reinstated in FY2025.

Presentation

Title VI Fare Equity Analysis

Low-Income Fare Design Report

C. Operations Committee Report

(3 minutes Michael Parker)

D. Planning Committee Report

(3 minutes Brenda Howerton)

E. New Business

1. Contract for Bus Stop Construction

(5 minutes Bong Vang)

ACTION REQUESTED: Award a contract to Whitley Contracting for construction, installation of amenities, and other improvements at 11 Durham bus stop locations, with a maximum dollar amount of \$600,701.20 and authorize the President/CEO to execute the contract consistent with those terms. Staff also requests authorization for an additional 10% project contingency, for a total contract budget of \$660,771.32.

V. Closed Sessions

ACTION REQUESTED: Enter into closed session for the purposes and pursuant to the General Statute references listed below.

A. Personnel Matter

(30 minutes Byron Smith)

NCGS §143-318.11.(a) (3) to consult with an attorney employed or retained by the public body in order to preserve the attorney client privilege between the attorney and the public body, which privilege is hereby acknowledged and NCGS §143-318.11.(a) (6) to consider the performance of an employee or to hear or investigate a complaint, charge, or grievance by or against an individual employee.

B. Disposition of Real Property

(15 minutes Charles Lattuca)

NCGS §143-318.11.(a) (3) to consult with an attorney employed or retained by the public body in order to preserve the attorney client privilege between the attorney and the public body, which privilege is hereby acknowledged and NCGS §143-318.11.(a) (5) to establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease.

VI. Other Business

A. President & CEO's Report

(5 minutes Charles Lattuca)

Contracts

New Hires & Promotions

1. Operations Update

(5 minutes Vinson Hines)

Operations Statistics

2. Communication Update

(5 minutes Eric Curry)

3. Strategic Plan Update

(5 minutes Meg Scully)

Presentation by David Johnson, TransPro

4. Capital Projects Status Report

(Katharine Eggleston)

Annual Real Estate Update

(20 minutes Gary Tober)

B. General Counsel's Report

(5 minutes Byron Smith)

C. Chair's Report

(5 minutes Brenda Howerton)

D. Board Member Reports

1. CAMPO Executive Board Representative

(5 minutes Patrick Hannah)

2. Regional Transportation Alliance (RTA) Rep.

(5 minutes Brenda Howerton)

3. DCHC MPO Board Representative

(5 minutes Michael Parker)

VII. Adjournment

(Brenda Howerton)



BOARD OF TRUSTEES MEETING MINUTES

4600 Emperor Boulevard
Suite 100
Durham, NC 27703

Wednesday, January 24, 2024

12:00 p.m.

GoTriangle Board Room

Board members present | Corey Branch, Susan Evans, Patrick Hannah, Brenda Howerton, Vivian Jones, Michael Parker, Sally Greene, Jennifer Robinson, Leo Williams [arr. 12:29 p.m.]

Board members attending remotely | Mary-Ann Baldwin [arr. 12:05 p.m.]

Board members absent | Michael Fox, Valerie Jordan

Chair Brenda Howerton officially called the meeting to order at 12:03 p.m. A quorum was present.

I. Adoption of Agenda

Action: On motion by Jones and second by Branch the agenda was adopted. Upon vote by roll call, the motion was carried unanimously.

II. Public Comment

No comments.

III. Consent Agenda

Action: A motion was made by Parker and seconded by Jones to approve the consent agenda. Upon vote the motion was carried unanimously.

The following consent agenda items were approved:

- December 20, 2023 | Regular Session Minutes.
- Adopted GoTriangle Short Range Transit Plan FY2024-2028*.
- Adopted the Wake Transit ADA Policy* and Service Guidelines and Performance Measures*.

*These documents are attached and hereby made a part of these minutes.

Baldwin joined.

IV. Presentations

A. Strategic Plan Information

Scott Thomas introduced Matt Web and John Lewis of TransPro. Their presentation is attached and hereby made a part of these minutes.

Williams arrived. 12:29

Lewis introduced the TransPro team, a public sector performance management firm, leading the effort to assist with the update of GoTriangle's strategic plan. TransPro's focus is on outcomes and the value transit provides to communities and customers but connecting frontline employees to employment, healthcare and opportunities.

He explained the strategic plan process which involves answering four basic questions:

- Why - mission, vision, values
- What - measurable strategic outcomes
- How - work plan, milestones, budget
- Who - performance, metrics, monitoring

The process will include interviews with board members and external stakeholders and conclude with employee training by the end of the calendar year.

Board members noted the importance of funding to achieve the new plan as well as clarity of GoTriangle's role in the region and support from its partners and stakeholders for the plan. They also discussed tying the goals of the plan into the budget and individual performance evaluations.

B. Paratransit Service Overview

Tammy Romain's presentation is attached and hereby made a part of these minutes.

GoTriangle's fixed route service was established in 2002, along with ACCESS, our complementary paratransit service, a specialized, curb-to-curb transit service with a door-to-door option for people unable to navigate fixed route bus service due to a disability. ACCESS operates seven days a week with 29 vehicles with the days, hours and locations mirroring our fixed route service. Service is limited to $\frac{3}{4}$ mile of all-day bus routes. The department is staffed with 22 full-time and seven part-time operators in addition to nine office staff. Users must qualify for the service based on eligibility:

- Unconditional – unable to use fixed route service under any circumstance
- Conditional – certain conditions when a rider cannot use fixed route service [locations where there are no sidewalks or ramps]
- Temporary – limited based on short-term injuries

ADA paratransit service is by reservation only and must be made at least 24 hours in advance. As a shared ride service, the fare is double the fixed route fare. Trips are not prioritized based on purpose. Personal care assistants, as a mobility aid, ride fare-free with the passenger.

Romain shared that the majority of passengers use the service for employment. In FY2023 36,318 trips were taken with an average trip length of 21.6 miles. The average weekday ridership is 130, with an average of 41 on Saturday and 18 on Sunday.

V. General Business Agenda

A. Items Removed from Consent Agenda

None.

B. Finance Review RFP

Scott Thomas presented a recommendation to authorize the President/CEO to award a contract to Deloitte Consulting for financial process and enhancement services for FY24 for \$493,756. He said a budget amendment is required.

Sandra Freeman said the goal of this project is to present financial information, including the annual budget, in an easy-to-understand format.

Greene questioned the high cost. Lattuca responded that building confidence with partners is worth the investment in a more efficient system and transparent reporting.

Action: A motion was made by Parker and seconded by Branch to authorize the President/CEO to award a contract to Deloitte Consulting for Financial Process and Enhancement Services for FY2024, with a maxim dollar amount of \$493,756 and execute the contract consistent with those terms and adopt *GoTriangle Budget Ordinance Amendment #2024 0001*. Upon vote by roll call, the motion was carried unanimously.

Lattuca added that the project should take about ten weeks.

C. Operations Committee Report

Michael Parker reported that the committee heard a presentation on the short range transit plan, and recommended approval, which was included on the consent agenda.

D. Administration & Governance Committee Report

Mary-Ann Baldwin reported that in addition to electing a chair and vice chair [Sally Greene], the committee discussed some of the work it will be doing, such as adding a business advisory board. Greene added that the committee also recommended adoption of the Wake ADA policy and Service Guidelines and Performance Measures, which were on the consent agenda.

E. New Business

None.

VI. Other Business**A. President and CEO's Report**

A list of contracts approved by the president and CEO is attached and hereby made a part of these minutes. Sandra Freeman noted that staff is working with Deloitte on a DBE goal for that contract.

Lattuca then reported on events he attended this month. He said staff is working on another DBE conference in late spring. A tour of RUS Bus for the Durham Chamber is being planned. He also referenced a chart comparing operator compensation around the region. He stated the board would be discussing this during budget season.

Susan Evans thanked staff and encouraged all board members to make time to participate in the orientation.

1. Operations Update

The monthly report and presentation are attached and hereby made a part of these minutes.

Vinson Hines shared the following statistics from September:

- Average weekday ridership: 5,251 up 21.4% from 2022; up 5.6% from 2019.
- Average Saturday ridership: 3,482, up 39.5% from 2022; up 136% from 2019.
- Average Sunday ridership: 1,825, up 38.2% from 2022; up 98.2% from 2019.
- Average weekday boardings - paratransit: 126, up 24.8% from 2022; down 8.7% from 2019.
- Average Saturday boardings - paratransit: 45, up 18.4% from 2022; up 2.3% from 2019.
- Average Sunday boardings - paratransit: 14, up 22.2% from 2022; down 46.2% from 2019.
- Operators: 65 fulltime, 14 part-time, 11 trainees.
- Police responded to 5 incidents in December and EMS, 1.

Hines shared that service changes would be implemented in March to improve on-time performance. No additional operators are required. Route 100, 300 and 305 will experience minor schedule changes to provide more travel time to arrive at mid-route timepoints. Routes 400, 405 and 700 will no longer be interlined [combined], allowing for improved on-time performance and operator work environment. Passengers will need to transfer at Durham Station who are transferring between 400 and 405 to/from 700. Additionally, route 700 will make the current detoured alignment permanent.

2. Capital Projects Status Report

Katharine Eggleston's presentation is attached and hereby made a part of these minutes.

RUS Bus

Construction is underway and the final design and permitting are concluding. The scheduled opening for operations in mid-2025 is on track. The project is on budget and a guaranteed maximum price for phase 2 should be locked in soon.

Triangle Mobility Hub

This facility will replace the regional transit center at the Plaza, which was always envisioned as a temporary location. The new location, at the corner of Miami Blvd. and NC54, is near the NCR corridor. The property is owned by the Research Triangle Foundation. This site will offer seamless multi-modal connections in an integrated community environment that provides access to opportunity.

Sustainability is a major focus for this project to support GoTriangle's goals for fleet electrification. The project schedule anticipates the facility opening between 2028-2030, depending on grant availability and the delivery method. Currently GoTriangle

is engaged in site survey, third party coordination and development of grant applications and a stakeholder involvement and communications plan. Williams asked if the region is competing against itself when other jurisdictions and agencies are applying for the same grants. Eggleston responded that there has been conversation about this and it is impossible to know what the federal grant-making agency is looking. She said there are many more grant applications received than eligible project funding and when the award decisions are made, there is an effort to have geographic and program/modal diversity. At the time of application it is impossible to know which projects will be the highest scoring and also fit the slots the federal agency is seeking to fill. The decision was made to put forward all the projects from the region that would score well to give the Triangle area the highest chance that a project will fit what is being sought when the grant awards are made.

Regional Rapid Bus and BRT Study

- Goals – improve mobility in the region, assure high quality customer service and endorse sound growth patterns
- Complements other efforts – FAST 2 and Durham BRT studies

3. Communications Update

Eric Curry noted that information cards have been created about GoTriangle's paratransit service. He said similar cards will be developed for other areas. He reported on the meeting the Sustainable Travel Services area had with RDU and its tenants. There may be an opportunity to create a vanpool for employees at the airport.

Wendy Mallon then shared with board members the "New Year, New Socks" campaign to collect donations of socks for the Women's Center in Raleigh and the Durham Rescue Mission.

B. General Counsel's Report

Byron Smith reported that he has been invited to be a panelist at APTA's Legal Affairs Conference in February for a session on growing pains for small agencies.

C. Chair's Report

No report.

D. Board Member Reports

1. CAMPO Executive Board Representative

Patrick Hannah report that he attended his first meeting. There were presentations by GoTriangle and on the S-line.

2. Regional Transportation Alliance (RTA) Representative

Brenda Howerton noted RTA's annual meeting scheduled for Friday.

3. DCHC MPO Board Representative

Michael Parker reported that the MPO is getting ready for the 2055 MTP which will proceed over the next year. Evans added that there will be a joint meeting of the MPOs next week.

VII. Adjournment

Action: Chair Howerton adjourned the meeting at 2:31 p.m.

Brenda Howerton, Chair

Attest:

Michelle C. Dawson, CMC
Clerk to the Board

AGENDA ACTION ITEM

Submitted by: Michelle Dawson, Clerk to the Board of Trustees

Meeting date: February 28, 2024

SUBJECT: Unsealing Closed Session Minutes

Strategic Objective or Initiative Supported

Staff Recommendation

Staff requests that the board unseal the minutes listed below.

Item Summary

Pursuant to board policy, all closed session minutes are sealed immediately upon preparation, with a periodic review of sealed closed session minutes and recommendation to the board for unsealing. The Board last took action to unseal closed session minutes in September 2023.

Pursuant to policy, and in consultation with the General Counsel, the following minutes are recommended to be unsealed (minutes through December 31, 2023, were reviewed).

Board / Committee	Date	G.S. Reference	Agenda Topic
Board of Trustees	01/27/2021	143-318.11(a)(3) & (5)	NCRR negotiations
Board of Trustees	03/24/2021	143-318.11(a)(3) & (5)	RUS Bus negotiations
Board of Trustees	10/27/2021	143-318.11(a)(3)	RUS Bus agreements
Board of Trustees	12/15/2021	143-318.11(a)(3)	RUS Bus agreements
Board of Trustees	03/23/2022	143-318.11(a)(3)	RUS Bus development
Board of Trustees	02/22/2023 A	143-318.11(a)(5)	Disposition of real property
Board of Trustees	03/22/2023	143-318.11(a)(3)	RUS Bus
Board of Trustees	04/19/2023	143-318.11(a)(3)	Wake County Transit Governance ILA
Board of Trustees	06/28/2023 A	143-318.11(a)(3)	Real property
Board of Trustees	06/28/2023 B	143-318.11(a)(3) & (5)	RUS Bus negotiations
Board of Trustees	08/23/2023	143-318.11(a)(3) & (5)	RUS Bus
Board of Trustees	09/27/2023 A	143-318.11(a)(3)	Advice of counsel
Operations & Finance	10/05/2023 A	143-318.11(a)(3)	Disposition of real property
Operations & Finance	10/05/2023 B	143-318.11(a)(3)	Response to Bret Martin Letter
Operations & Finance	10/05/2023 C	143-318.11(a)(1)	Financial Review RFP

Financial Impact

None

Attachments

- None

AGENDA ACTION ITEM

Submitted by: Steven Schlossberg, Finance & Administrative Services

Meeting date: February 7, 2024

SUBJECT: Wake Transit FY 2024 Q3 Wake Transit Work Plan/Budget Amendment

Strategic Objective or Initiative Supported

Implement the Wake Transit Plan with Transit Planning Advisory Committee

Staff Recommendation

Recommend board approval of the FY2024 Q3 Wake Transit Work Plan amendments.

Item Summary

Two (2) major amendments have been submitted for approval:

Operating Amendment

1. **Improvements to Route 21 - Caraleigh** (Major Amendment): City of Raleigh is requesting funds that will improve service on Route 21-Caraleigh by adding frequency. The alignment will continue to operate in a clockwise loop. The original project in FY20 increased the peak frequency to 30 minutes. This amendment request is to move the improvements programmed in FY26 to FY24. If approved, the amendment would increase frequency to 15 minutes during the day and 30 minutes in the evenings daily.

Capital Amendments

2. **New Bern Corridor Bus Rapid Transit (BRT)** (Major Amendment): City of Raleigh is requesting funds for additional contingency as the City prepares to bid the New Bern Avenue BRT project for construction. Due to the unprecedented market conditions during the pandemic and increased professional services and real-estate costs, the City anticipates this need to award construction bid.

At the time the GoTriangle Audit and Finance Committee receives this item, TPAC will have already reviewed and recommended the listed amendments to both the CAMPO Executive Board and the GoTriangle Board of Trustees. The CAMPO Executive Board will be presented the FY 2024 Q3 Wake Transit Amendments during February 21, 2024 Executive Board Meeting.

Financial Impact

The proposed amendments will increase the FY2024 Wake Transit Work Plan by \$8,500,000.

Attachments

- Detailed Project Amendment Request

2024 0002

GoTRIANGLE FY2024 BUDGET ORDINANCE AMENDMENT
TRIANGLE TAX DISTRICT - WAKE CAPITAL FUND

BE IT ORDAINED by the Research Triangle Regional Public Transportation Authority Board of Trustees, that pursuant to section 13.2 of Chapter 159 of the General Statutes of North Carolina, the following project ordinance is hereby adopted:

Section 1. It is estimated that the following revenues will be available in the **Triangle Tax District - Wake Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Article 43 ½ Cent Local Option Sales Tax	\$ 98,480,740	\$ 98,144,380
Community Funding Area Fund Balance	661,935	661,935
Allocation from Wake Capital Fund Balance	<u>14,232,843</u>	<u>44,204,203</u>
Total	\$ 113,375,518	\$ 143,010,518

Section 2. The following amounts hereby are appropriated in the **Triangle Tax District - Wake Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Capital Planning		
Capital Area Metropolitan Planning Organization [CAMPO]	\$ 250,000	\$ 250,000
Wake County		135,000
Community Funding Area		
Town of Apex	429,275	429,275
Town of Knightdate	232,660	232,660
Transit Infrastructure		
GoTriangle	2,875,375	13,875,375
City of Raleigh	21,169,859	21,169,859
Town of Cary	26,471,404	36,471,404
Reserve	1,124,864	1,124,864
Vehicle Acquisition		
City of Raleigh	1,456,096	1,456,096
GoTriangle	2,113,500	2,113,500
Bus Rapid Transit		
GoRaleigh	<u>57,252,485</u>	<u>65,752,485</u>
Total	\$ 113,375,518	\$ 143,010,518

Section 3. The GoTriangle President/CEO, or his or her designee, is hereby authorized to transfer funds within appropriations under the following conditions:

- A) No transfer may be made that changes the adopted allocations to fund balance.
- B) All budget transfers will be reported to the Transit Planning Advisory Committee.

- C) All increases to an appropriation, and all transfers between appropriations, must be reviewed by the Transit Planning Advisory Committee and approved by the CAMPO and GoTriangle governing boards.

Section 4. Triangle Tax District – Wake Capital Funds are appropriated pursuant to section 13.2 of Chapter 159 of the General Statutes of North Carolina; therefore, appropriations do not lapse at the end of the fiscal year and are available for duration of the project unless subsequently recommended for reallocation by the Transit Planning Advisory Committee and approved by the CAMPO and GoTriangle governing boards, or as specified in Section 5.

Section 5. GoTriangle Finance Department has authority to close projects and/or programs and reduce appropriations upon notification of project completion by the project sponsor. When actual revenues are available in projects to be closed or which are substantially complete, GoTriangle Finance may transfer savings to Triangle Tax District Wake Capital fund balance. These funds will be then available for future appropriations which require recommendation by the Transit Planning Advisory Committee and approval by the CAMPO and GoTriangle governing boards. This section applies to current and prior year appropriations. A list of project closeouts shall be provided quarterly to the Transit Planning Advisory Committee.

Section 6. Small Starts Funding from the FTA in support of the Southern Corridor Bus Rapid Transit project will be awarded directly to the City of Raleigh. Expenditures funded by these federal funds will be budgeted by the City of Raleigh in their respective Transit Grant Fund. Dollars budgeted above are the local funds budgeted by the tax district and allocated to the City of Raleigh in support of this project.

Section 7. Copies of the Budget Ordinance shall be furnished to the Clerk, to the Board of Trustees, to the Finance Officer, and to the Budget Officer of this Authority to be kept on file for their direction in the disbursement of funds. Copies also shall be furnished to representatives of the Agencies under Section 2. The Budget Ordinance shall be entered into the Board minutes.

ATTEST:

ADOPTED THIS THE 28TH DAY OF FEBRUARY 2024.

Michelle C. Dawson, Clerk to the Board

Brenda Howerton, Board of Trustees Chair

FY24 Budget Change Impact - Wake Transit Plan

	<u>Revenue</u>	<u>Expenditures</u>	<u>Reserve/Cash Impact</u>	<u>Fund Affected</u>	<u>Comments</u>
FY24 Approved Budget	\$ 455,191,074	\$ 469,423,920	\$ (14,232,846)		
Amended FY24-Q2 Budget	\$ 455,191,074	\$ 490,895,280	\$ (35,704,206)		
City of Raleigh (Raleigh - Capital)		8,500,000	(8,500,000)	43	New Bern BRT - Additional Funds needed for Construction
Amended FY24-Q3 Budget	\$ 455,191,074	\$ 499,395,280	\$ (44,204,206)		
Changes from Amendments	\$ -	\$ 8,500,000	\$ (8,500,000)		

AGENDA ACTION ITEM

Submitted by: Steven Schlossberg, Finance & Administrative Services

Meeting date: February 7, 2024

SUBJECT: Q3 Durham County FY24 Transit Work Program and Budget Amendment

Strategic Objective or Initiative Supported

Implement the Durham Transit Plan with Staff Working Group

Staff Recommendation

Recommend board approval of the FY2024 Q3 Durham Transit Work Program amendments.

Item Summary

Three (3) amendments

Operating Amendment

1. **Transit Construction Team Leader:** GoDurham is requesting funds to reflect the actual salary and benefits for the Transit Construction Team Leader position.
2. **Transit Construction Project Manager:** GoDurham is requesting funds to reflect the actual salary and benefits for the Transit Construction Project Manager position.

Capital Amendment

3. **DIGI Modems:** GoDurham is requesting to reallocate the remaining funds from the CAD/AVL project to the DIGI Modem project. Additional funds of \$68,825 is also requested for the DIGI Modem project. The City determined that the existing DIGI modems installed on the fleet would not be compatible with the upgraded system and would need to be replaced. The request covers the cost of design and installation of the new modems across the fleet.

The Durham Staff Working Group voted unanimously to recommend approval of these items at their January 17, 2024 meeting. Staff anticipates they will be considered for approval by the Durham BOCC at their February 26, 2024 meeting.

Financial Impact

The proposed amendments will increase the FY2024 Durham Transit Work Program by \$126,254.

Attachments

- Detailed Project Amendment Request

2024 0003

**GO TRIANGLE FY2024 BUDGET ORDINANCE AMENDMENT
TRIANGLE TAX DISTRICT - DURHAM OPERATING FUND**

BE IT ORDAINED by the Research Triangle Regional Public Transportation Authority Board of Trustees:

Section 1. It is estimated that the following revenues will be available in the **Triangle Tax District Durham Operating Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Article 43 ½ Cent Sales Tax	\$ 11,126,910	\$ 11,138,338
Vehicle Rental Tax	87,171	87,171
\$7 County Vehicle Registration Tax	1,763,141	1,763,141
\$3 Vehicle Registr. Tax Transfer from Durham Special Tax District	<u>755,611</u>	<u>755,611</u>
Total	\$ 13,732,833	\$ 13,744,261

Section 2. The following amounts hereby are appropriated in the **Triangle Tax District Durham Operating Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Tax District Administration - GoTriangle	\$ 490,967	\$ 490,967
Transit Plan Administration		
DCHC MPO	39,806	39,806
Durham County Access	392,578	392,578
GoDurham	143,772	201,201
GoTriangle	1,776,200	1,776,200
Transit Operations		
Durham County Access	280,203	280,203
GoDurham	8,025,648	8,025,648
GoTriangle	<u>2,583,659</u>	<u>2,537,658</u>
Total	\$ 13,732,833	\$ 13,744,261

Section 3. The FY24 Durham Transit Work Program reflects ongoing projects that remain vital to providing service to current transit customers and new projects that address immediate needs during a transition year to a new Transit Plan with updated priorities. The current project budgets identified are those that are deemed time-sensitive ongoing efforts or involve time-sensitive external grant sources as part of their overall funding mechanism. DCHC MPO, GoTriangle and Durham County will consider amendments to the FY24 Durham Transit Work Program as priorities are identified in the new Transit Plan.

Section 4. Copies of this Budget Ordinance shall be furnished to the Clerk to the Board of Trustees and to the Budget Officer of this Authority to be kept on file for their direction in the disbursement of funds.

ATTEST:

ADOPTED THIS THE 28TH DAY OF FEBRUARY 2024.

Michelle C. Dawson, Clerk to the Board

Brenda Howerton, Board of Trustees Chair

2024 0004

**GO TRIANGLE FY2024 BUDGET ORDINANCE AMENDMENT
TRIANGLE TAX DISTRICT – DURHAM CAPITAL FUND**

BE IT ORDAINED by the Research Triangle Regional Public Transportation Authority Board of Trustees:

Section 1. It is estimated that the following revenues will be available in the **Triangle Tax District – Durham Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Article 43 ½ Cent Local Option Sales Tax	\$ <u>28,873,091</u>	\$ <u>28,861,662</u>
Total	\$ <u>28,873,091</u>	\$ <u>28,861,662</u>

Section 2. The following amounts hereby are appropriated in the **Triangle Tax District – Durham Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Capital Planning		
Durham County		\$ 110,000
DCHC MPO	\$ 1,081,600	1,081,600
GoDurham	100,000	100,000
Transit Infrastructure		
GoDurham	7,338,121	7,406,946
GoTriangle	4,896,300	4,971,850
Vehicle Purchase		
GoTriangle	369,096	369,096
Allocation to Durham Capital Fund Balance	<u>15,087,974</u>	<u>14,822,170</u>
Total	\$ <u>28,873,091</u>	\$ <u>28,861,662</u>

Section 3. Triangle Tax District – Durham Capital Funds are appropriated pursuant to section 13.2 of Chapter 159 of the North Carolina General Statutes; therefore, appropriations do not lapse at the end of the fiscal year and are available for the duration of the project unless subsequently approved for reallocation by the GoTriangle Board of Trustees.

Section 4. Copies of this Budget Ordinance shall be furnished to the Clerk to the Board of Trustees and to the Budget Officer of this Authority to be kept on file for their direction in the disbursement of funds.

ATTEST:

ADOPTED THIS THE 28TH DAY OF FEBRUARY 2024.

Michelle C. Dawson, Clerk to the Board

Brenda Howerton, Board of Trustees Chair

FY24 Budget Change Impact - Durham Transit Work Program

	<u>Revenue</u>	<u>Expenditures</u>	<u>Reserve/Cash Impact</u>	<u>Fund Affected</u>	<u>Comments</u>
FY24 Approved Budget	\$ 78,227,663	\$ 63,139,689	\$ 15,087,974		
Amended FY24 Budget (Nov 2023)	\$ 78,227,663	\$ 63,279,189	\$ 14,948,474		
City of Durham (Transit Plan Administration)		24,964	(24,964)	41	Transit Construction Project Manager - Additional funds allocated to reflect actual salary and benefits
City of Durham (Transit Plan Administration)		32,465	(32,465)	41	Transit Construction Team Lead - Additional funds allocated to reflect actual salary and benefits
City of Durham (Transit Infrastructure)		(164,856)	164,856	41	Decrease in GoDurham CAD/AVL - Funds repurposed to offset additional funds requested for the GoDurham DIGI Modems
City of Durham (Transit Infrastructure)		233,681	(233,681)	41	Increase in GoDurham DIGI Modems - Funds repurposed from GoDurham CAD/AVL. Funds will be utilized for design and installation of new modems across the fleet.
Amended FY24 Budget (Feb 2024)	\$ 78,227,663	\$ 63,405,443	\$ 14,822,220		
Changes from Amendments	\$ -	\$ 126,254	\$ (126,254)		

AGENDA ACTION ITEM

Submitted by: Steven Schlossberg, Finance & Administrative Services

Meeting date: February 7, 2024

SUBJECT: Q3 Orange County FY24 Transit Work Program and Budget Amendment

Strategic Objective or Initiative Supported

Implement the Durham Transit Plan with Staff Working Group

Staff Recommendation

Recommend board approval of the FY2024 Q3 Orange Transit Work Program amendments.

Item Summary

Seven (7) amendments

Operating Amendment

1. **Trapeze Software:** Orange County Transit Services (OCTS) is requesting to reallocate operating funds associated with the Hillsborough Circulator 2.0 project to be used as a one-time purchase of Trapeze software. Due to fleet issues, OCTS is delaying implementation of the Hillsborough Circulator 2.0 improvements (e.g. reverse circulator) until they have been resolved. OCTS anticipates resolving them by FY24-Q4.
2. **Planner I Transit Plan Support Staff:** Chapel Hill Transit (CHT) is requesting funding for an entry level position reporting to CHT's Transit Planning Manager and supporting all aspects of transit planning, operations, and capital investments. CHT is requesting one year of funding to more expeditiously meet critical staffing needs while exploring options for long-term funding sources.
3. **Bus Stop Amenities Technician:** Chapel Hill Transit (CHT) is requesting funds for a staff member to directly support the maintenance team, enhancing CHT's ability to clean, maintain, and repair the network's 535+ transit stops and amenities.
4. **Short Range Transit Plan (SRTP) Update:** Chapel Hill Transit (CHT) requests funding for an updated SRTP. The last SRTP was completed in early 2020, prior to the COVID-19 pandemic. The impacts of COVID, including a nationwide shortage of transit operators, significantly impacted CHT's ability to implement planned improvements. Additionally, post-COVID patterns of development, ridership, and employment are challenging the feasibility of assumptions in the 2020 SRTP. Updating this plan provides an opportunity to revisit the current plan and its assumptions, and to make changes to planned improvements to better serve Chapel Hill, Carrboro, Orange County, and the 40,000 people who commute into Chapel Hill each day.
5. **Chapel Hill High School/Rogers Road/Morris Grove Elementary (HS) Route Weekend Service Improvements:** Chapel Hill Transit (CHT) is requesting to reallocate funds to improve the HS Route weekend service to help offset the requested submitted amendments. The HS Route weekend improvements will be implemented in FY25 as budgeted in the adopted Orange County Transit Plan Update.

6. **Carrboro/Weaver Street (CW) Route Weekday Service Improvements:** Chapel Hill Transit (CHT) is requesting to reallocate funds to improve weekday service for the CW Route Improve to help offset the requested submitted amendments. The CW Route weekday improvements will be implemented in FY25.

Capital Amendment

7. **Mobility on Demand:** Orange County Transit Service (OCTS) is requesting to reallocate adopted funds from the Mobility on Demand Operating project to a new capital project to procure a one-time purchase of five mini vans.

The Orange Staff Working Group voted unanimously to recommend approval of these items at their January 19, 2024 meeting. Staff anticipates they will be considered for approval by the Orange BOCC at their February 20, 2024 meeting.

Financial Impact

The proposed amendments will have zero impact to the FY2024 Orange Transit Work Program due to reallocation of previously adopted funds.

Attachments

- Detailed Project Amendment Request



2024 0005

**GoTRIANGLE FY2024 BUDGET ORDINANCE AMENDMENT
TRIANGLE TAX DISTRICT – ORANGE OPERATING FUND**

BE IT ORDAINED by the Research Triangle Regional Public Transportation Authority Board of Trustees:

Section 1. It is estimated that the following revenues will be available in the **Triangle Tax District Orange Operating Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Article 43 ½ Cent Sales Tax	\$ 4,921,744	\$ 4,545,744
Vehicle Rental Tax	42,572	42,572
\$7 County Vehicle Registration Tax	831,178	831,178
\$3 Vehicle Registr Transfer from Orange Special Tax District	<u>358,222</u>	<u>358,222</u>
Total	\$ 6,153,716	\$ 5,777,716

Section 2. The following amounts hereby are appropriated in the **Triangle Tax District Orange Operating Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Tax District Administration – GoTriangle	\$ 321,253	\$ 321,253
Transit Administration		
Chapel Hill Transit		150,000
DCHC MPO	39,806	39,806
GoTriangle	528,339	528,339
Orange County Public Transportation	61,100	61,100
Transit Operations		
Chapel Hill Transit	2,847,385	2,647,385
GoTriangle	1,154,730	1,128,730
Orange County Public Transit	<u>1,201,103</u>	<u>901,103</u>
Total	\$ 6,153,716	\$ 5,777,716

Section 3. The FY24 Orange Transit Work Program reflects ongoing projects that remain vital to providing service to current transit customers and new projects that address immediate needs during a transition year to a new Transit Plan with updated priorities. The current project budgets identified are those that are deemed time-sensitive ongoing efforts or involve time-sensitive external grant sources as part of their overall funding mechanism. DCHC MPO, GoTriangle and Orange County will consider amendments to the FY24 Orange Transit Work Program as priorities are identified in the new Transit Plan.

Section 4. Copies of this Budget Ordinance shall be furnished to the Clerk to the Board of Trustees and to the Budget Officer of this Authority to be kept on file for their direction in the disbursement of funds.

ATTEST:

ADOPTED THIS THE 28TH DAY OF FEBRUARY 2024.

Michelle C. Dawson, Clerk to the Board

Brenda Howerton, Board of Trustees Chair

2024 0006

**GO TRIANGLE FY2024 BUDGET ORDINANCE AMENDMENT
TRIANGLE TAX DISTRICT – ORANGE CAPITAL FUND**

BE IT ORDAINED by the Research Triangle Regional Public Transportation Authority Board of Trustees:

Section 1. It is estimated that the following revenues will be available in the **Triangle Tax District – Orange Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
Article 43 ½ Cent Local Option Sales Tax	\$ 4,578,256	\$ 4,954,256
Allocation from Orange Capital Fund Balance	469,904	469,904
Reallocation of Reserves		
Prior Year Origin Destination Survey Reserve		-5,000
FAST 2 Study		5,000
FAST 2 Study (Allocation: Orange County Public Transportation)	<u>0</u>	<u>5,000</u>
Total	\$ 5,048,160	\$ 5,429,160

Section 2. The following amounts hereby are appropriated in the **Triangle Tax District – Orange Capital Fund** for the fiscal year beginning July 1, 2023, and ending June 30, 2024:

	Original	Revised
BRT		
Chapel Hill Transit – NS-BRT	\$ 4,000,000	\$ 4,000,000
Capital Planning		
Orange Public Transportation		105,000
Transit Infrastructure		
GoTriangle	550,000	576,000
Town of Hillsboro	286,000	286,000
Vehicle Purchase		
GoTriangle	212,160	212,160
Orange Public Transportation	<u>0</u>	<u>250,000</u>
Total	\$ 5,048,160	\$ 5,429,160

Section 3. Triangle Tax District – Orange Capital Funds are appropriated pursuant to section 13.2 of Chapter 159 of the North Carolina General Statutes; therefore, appropriations do not lapse at the end of the fiscal year and are available for the duration of the project unless subsequently approved for reallocation by the GoTriangle Board of Trustees.

Section 4. Capital funds included under the Origin Destination Survey adopted FY2021 Orange Transit Work Plan and reauthorized as part of Ordinance 2023 0007 have been transferred to the FAST 2 Study project (27OPTAD06). Funds have been appropriated to the Orange County Public Transportation to fund the FY2024 quarter 2 amendment.

Section 5. Copies of this Budget Ordinance shall be furnished to the Clerk to the Board of Trustees and to the Budget Officer of this Authority to be kept on file for their direction in the disbursement of funds.

ATTEST:

ADOPTED THIS THE 28TH DAY OF FEBRUARY 2024.

Michelle C. Dawson, Clerk to the Board

Brenda Howerton, Board of Trustees Chair

FY24 Budget Change Impact - Orange Transit Work Program

	<u>Revenue</u>	<u>Expenditures</u>	<u>Reserve/Cash Impact</u>	<u>Fund Affected</u>	<u>Comments</u>
FY24 Approved Budget	\$ 15,458,143	\$ 15,928,047	\$ (469,904)		
Amended FY24 Budget (Nov 2023)	\$ 15,458,143	\$ 15,928,047	\$ (469,904)		
Chapel Hill Transit (Transit Operations)		(104,625)	104,625	42	Decrease in HS Route - Weekend Service - Funds repurposed to offset Chapel Hill Transit new amendment requests
Chapel Hill Transit (Transit Operations)		(195,375)	195,375	42	Decrease in CW Route - Improve mid-day service - Funds repurposed to offset Chapel Hill Transit new amendment requests
Chapel Hill Transit (Transit Operations)		150,000	(150,000)	42	Short Range Transit Plan - Funds allocated to complete a Short Range Transit Plan fo Chapel Hill Transit.
Chapel Hill Transit (Transit Plan Administration)		90,000	(90,000)	42	Planner I - One year of salary and benefits fo new FTE
Chapel Hill Transit (Transit Plan Administration)		60,000	(60,000)	42	Bus Stop Amenities Technician - One year of salary and benefits for new FTE
Orange Public Transportation (Transit Operations)		(200,000)	200,000	42	Decrease in Hillsborough Circulator 2.0 - Funds repurposed to offset OPT's new amendment requests to procure Trapeze
Orange Public Transportation (Transit Operations)		200,000	(200,000)	42	Trapeze software - One-time purchase of Trapeze software.
Orange Public Transportation (Transit Operations)		(250,000)	250,000	42	Decrease in Mobility on Demand (MOD) - Funds repurposed to offset new amendment requests to procure five (5) MOD Minivans
Orange Public Transportation (Vehicle Acquisition)		250,000	(250,000)	42	Mobility on Demand Minivans - One-time purchase of five (5) MOD Minivans
Amended FY24 Budget (Feb 2024)	\$ 15,458,143	\$ 15,928,047	\$ (469,904)		
Changes from Amendments	\$ - -	\$ - -	\$ - -		

AGENDA ACTION ITEM

Submitted by: Audra Foree, Bus Operations, Regional Partnerships

Meeting date: February 7, 2024

SUBJECT: GoTriangle Vanpool Contract and Subsidy

Strategic Objective or Initiative Supported

- 1.1 Increase the number of customers served with sustainable transportation services
- 1.5 Maintain cost-effectiveness.

Action Requested

Staff requests the committee recommend the board award a contract with Enterprise Leasing Company – Southeast, LLC (“Enterprise”) from February 2024 through FY2027, with two (2) additional terms of one (1) year each through FY29. The maximum dollar amount is \$1,800,000. Staff requests that the President/CEO be authorized to execute the contract consistent with those terms.

In addition, staff recommends an increase in the subsidy provided to offset proposed increases in costs, based upon Enterprise’s updated price matrix. The current subsidy is \$350 for groups traveling 35 or fewer daily commute miles, and \$450 for groups traveling more than 35 daily commute miles. Currently all vanpools are subsidized at \$450. In order to minimize price impacts on customers and to make vanpool prices attractive to potential customers, staff recommends a subsidy not to exceed 30% of the cost to commuters, up to a maximum of \$600 per vanpool.

Background and Purpose

GoTriangle has been in the vanpool business since 1991. In past years, GoTriangle owned and maintained vans that were leased to groups of commuters with the purpose of reducing single occupancy vehicle travel to work, and to improve air quality within the Durham, Orange, and Wake County Region. In June 2018, the decision was made to contract this service arrangement to Enterprise.

The Vanpool Service Goal is to provide and promote attractive, affordable, safe, reliable, cost-neutral vanpool service to commuters living and/or working in Durham, Orange, and Wake Counties.

- Vanpools consist of 4-15 Individuals who share similar work times and commute locations.
- Vanpool commutes must begin or end within the three county region.
- The Driver is one or more of the commuters within the vanpool.
- Each commuter pays a low monthly fare based on mileage.
- Monthly fare covers the cost of insurance, gasoline and vehicle maintenance costs.
- Fares are based on monthly miles traveled.
- Employer Subsidies (such as those at Federal work places like The Durham VA Medical Center, Bureau of Prisons, or Grifols and RTI) can reduce income taxes and employer payroll taxes.
- All vanpool commuters are eligible for our free emergency ride home program when employees are ill, have a personal emergency, or unscheduled overtime.

Per statistics provided by Enterprise, during FY23 GoTriangle averaged 16 vanpools, traveling 1,144,790 miles. These vanpools reduced 854,119 commute miles traveled, eliminated 22,164 trips, and reduced 650,913 lbs. of CO2 emissions.

Financial Impacts

There are currently 20 vanpools in operation. GoTriangle currently pays \$9,000 per month in subsidies for a total of \$108,000 annually and the current FY24 Budget totals \$135,000. Total invoiced expenses monthly from Enterprise are anticipated to increase from \$33,577 to \$40,441, under the new contract, a difference of \$6,864. The cost increase is attributed primarily to increased costs of vehicle purchases and a 95% increase in insurance rates.

New proposed rates submitted by Enterprise will increase costs to customers significantly. If GoTriangle remains at current subsidy rates and has an increase of 10 vanpools, the annual amount from GoTriangle would be \$162,000. If the Board approves an offset of customer cost by increasing the subsidy to an average of \$600 per month, the customer impact will be decreased for the average vanpool, and increase GoTriangle costs to \$216,000.

Year 1 – 30 vanpools @ \$600/mo.	\$ 216,000
Year 2 - 40 vanpools @ \$600/mo.	\$ 288,000
Year 3 – 50 vanpools @ \$600/mo.	\$ 360,000
Year 4 – 60 vanpools @ \$600/mo.	\$ 432,000
Year 5 – 70 vanpools @ \$600/mo.	\$ 504,000
Proposed Contract Amount	\$1,800,000

GoTriangle's contractual agreement with Enterprise requires them to report their activity for inclusion information reported to the Federal Transit Administration's National Transit Database for which GoTriangle receives federal Section 5307 grant funds.

Attachments

- None

Staff Contact

- Audra Foree, Sr. Manager of Regional Partnerships, aforee@gotriangle.org, 919-407-0867



AGENDA ACTION ITEM

Submitted by: Gary Tober, Real Estate and Facilities

Meeting date: February 28, 2024

SUBJECT: Wake County Bus Stop Property Acquisition

Strategic Objective or Initiative Supported

2.4 Ensure an attractive and accessible transit environment

Staff Recommendation

GoTriangle staff requests that the board authorize it to conduct early outreach and acquire the property interest needed for GoTriangle bus stop improvements in Wake County in order to make improvements at the following existing and new bus stop locations:

No.	BUS ID	Major Street	Minor Street	Bus Stop Owner	PIN	Parcel ID
1	1258	Pine Plaza Dr	Laura Duncan Rd WB	GoTriangle	0742987022	0007532
2	1217	Slater Rd	Carrington Mill Blvd (EB)	GoTriangle	0757001338	0365271
3	1220	Copley Pkwy	Slater Rd EB	GoTriangle	0756382750	0186624
4	1219	Copley Pkwy	Slater Rd WB	GoTriangle	0756286909	0217171
5	1969	Salisbury St	W Davie St	GoTriangle	1703675246	0019604
6	1201	Hillsborough St	Mayo St (Saint Mary's School)	GoRaleigh & GoTriangle	1703390938	170306
7	9065	Western Blvd	Heather Dr	GoRaleigh & GoTriangle	0784419124	0079398
8	8264	Western Blvd	Powell Dr	GoRaleigh & GoTriangle	0784511432	0063210
9	1277	Western Blvd	Dan Allen Dr (EB)	GoTriangle	0793592288	0116948
10	1945	Hillsborough St	Jones Franklin Rd	GoTriangle	0784310583	0011587
11	1970	Salisbury St	W South St SB	GoTriangle	1703654924	0101338
12	1260	Pine Plaza Dr	Costco WB	GoTriangle	0752175074	0427892
13	1259	Pine Plaza Dr	Costco EB	GoTriangle	0752162653	0427891
14	1449	Hughes St	Williams St (Compare Foods Park-&-Ride (PM))	GoTriangle	0741490424	0063405
15	1450	Apex Park	Ride (Compare Foods)	GoCary & GoTriangle	0741492343	0000593
16	1890	E 4th St	Wendell Park and Ride (WB)	GoTriangle	1784703594	0104142
17	1888	Zebulon Park and Ride	Zebulon Park and Ride (Compare Foods)	GoTriangle	2705044648	0132676
18	1257	Pine Plaza Dr	Laura Duncan Rd EB	GoTriangle	0742974488	0408482
19	1262	Pine Plaza Dr	Lake Pine EB (Relocated)	GoTriangle	0752361392	0218288
20	1407	Pine Plaza Dr	Lake Pine WB	GoTriangle	0752269973	0032658
21	1164	Laura Duncan Rd	Apex Peakway (SB)	GoTriangle	0742636321	0471822
22	1913	Dillard Dr	Meeting St EB	GoTriangle	0772690945	0267700
23	1315	Tryon Rd	Cary Pkwy (WB)	GoTriangle	0772056941	0241805

No.	BUS ID	Major Street	Minor Street	Bus Stop Owner	PIN	Parcel ID
24	1842	Chatham St	WakeMed Soccer Park EB	GoTriangle	0774139073	077413
25	1843	Chatham St	WakeMed Soccer Park WB	GoTriangle	0774139073	0447489
26	11034	Dillard Dr	Meeting St WB	GoTriangle	0773602664	0053394
27	1408	Pine Plaza Dr	Shepherds Vineyard Dr EB	GoTriangle	0752269973	0032658
28	1263	Pine Plaza Dr	Shepherds Vineyard Dr WB	GoTriangle	0752264645	0218286
29	1952	McDowell St	Lenoir St	GoTriangle	1703663373	0101643
30	1227	Jones Franklin Rd	Hunt Club Ln (SB)	GoTriangle	0784202096	0121386
31	8063	Salisbury St	W Davie St	GoRaleigh & GoTriangle	1703675136	0079756
32	8071	W Edenton St	S Harrington St	GoRaleigh & GoTriangle	1703594635	0059519
33	9066	Western Blvd	Deboy St EB	GoRaleigh & GoTriangle	0784609930	0029240
34	1276	Western Blvd	Gorman St (WB)	GoTriangle	0794201921	0045454
35	1303	Western Blvd	Gorman St (EB)	GoTriangle	0794203589	0043939
36	1281	Western Blvd	Boylan Ave (EB)	GoTriangle	1703241889	0113250
37	8232	Hillsborough St	Mayo St (Saint Mary's School)	GoRaleigh & GoTriangle	1703390938	0089689
38	8226	Western Blvd	Merendino Dr WB	GoRaleigh & GoTriangle	0784716281	0356465
39	1299	Western Blvd	Boylan Ave (WB)	GoTriangle	1703350994	0121285
40	1596	Mason St	Apex Town Hall (SB)	GoTriangle	0742525172	0237195
41	1452	Mason St	Apex Town Hall (NB)	GoTriangle & GoApex	0742519592	0088141
42	1306	Jones Franklin Rd	Centerview Dr (SB)	GoTriangle	0783024533	0352875
43	1308	Jones Franklin Rd at Woodsdale Rd	Jones Franklin Rd at Woodsdale Rd (NB)	GoTriangle	0783016359	0159934
44	1309	Jones Franklin Rd	Wayne St (NB)	GoTriangle	0783016359	0159934
45	1310	Jones Franklin Rd at Crossroads Blvd (NB)	Jones Franklin Rd at Crossroads Blvd (NB)	GoTriangle	0782094859	0018271
46	1273	Jones Franklin Rd at Penwood Dr	Jones Franklin Rd at Penwood Dr (SB)	GoTriangle	0783024533	0352875
47	1184	Apex Peakway	Hughes St (EB)	GoTriangle	0741653978	0510776
48	2024005	US 401	Ten Ten SB	GoTriangle	0689975752	0009716
49	2024006	US 401	Ten Ten NB	GoTriangle	0689974184	0302119
50	2024003	Rex Holly Springs	Rex Holly Springs	GoTriangle	0648889704	0015500
51	1271	Dillard Dr	Jones Franklin Rd	GoTriangle	0772993135	0218990
52	1272	Jones Franklin Rd	Crossroads Blvd (SB)	GoTriangle	0784511432	0063210
53	1269	Dillard Dr	Walnut St (EB)	GoTriangle	0772791815	0132668
54	1270	Dillard Dr	Corning Rd (EB)	GoTriangle	0772892538	0191228
55	1294	Dillard Dr	Piney Plains Rd (WB)	GoTriangle	0773406105	0306838
56	1295	Dillard Dr	Piney Plains Rd (EB)	GoTriangle	0772497496	0037061

No.	BUS ID	Major Street	Minor Street	Bus Stop Owner	PIN	Parcel ID
57	1313	Dillard Dr	Walnut St (WB)	GoTriangle	0773704314	0200728
58	1318	Tryon Rd	WakeMed Cary Hospital	GoTriangle	0762448334	0173711
59	1320	Piney Plains Rd	Tryon Rd (NB)	GoTriangle	0772377484	0266695
60	1321	Piney Plains Rd	Tryon Rd (SB)	GoTriangle	0772267787	0057240
61	1322	Piney Plains Rd	Scarlet Sky Ln (NB)	GoTriangle	0772377484	0266695
62	1323	Piney Plains Rd	Scarlet Sky Ln (SB)	GoTriangle	0772371989	0059379
63	2025009	Wendell Falls	Taylor RD (EB)	GoTriangle	1763779768	0476119
64	2025010	Wendell Falls	Taylor RD (WB)	GoTriangle	1763881332	0459312
65	2025012	E Gannon Ave	Old US 264 (WB)	GoTriangle	2705885272	0357252
66	2025013	N Arendell Ave	Waketon St	GoTriangle	2705187615	0070859
67	2025015	W Gannon Ave	N Arendell Ave (EB)	GoTriangle	2705257235	0103434
68	2025016	W Gannon Ave	N Arendell Ave (WB)	GoTriangle	2705257598	0075127
69	2025017	W Gannon Ave	Mock Todd Rd (EB)	GoTriangle	2705140239	0022143
70	2025018	W Gannon Ave	Mock Todd Rd (WB)	GoTriangle	2705140664	0020592
71	1218	Slater Rd	Carrington Mill Blvd	GoTriangle	0757111072	0036406
72	1267	Tryon Rd	SE Cary Pkwy (EB)	GoTriangle	0772059432	0241803
73	1308	Jones Franklin Rd	Woodsdale Rd (SB)	GoTriangle	0783014897	0046936
74	1273	Jones Franklin Rd	Penwood Dr (NB)	GoTriangle	0783122137	0072895

Item Summary

Following Board approval, GoTriangle's real estate team will receive the approved right-of-way plans from GoTriangle's design engineer. Depending on site conditions, GoTriangle will typically need to acquire between 50 and 500 square feet of right-of-way per bus stop. A GoTriangle agent will meet with affected property owners to explain the impacts of the improvements. Before the initiation of negotiations, the property interest to be acquired will be appraised, unless the owner is donating the property and releases GoTriangle from the appraisal obligation, or GoTriangle determines that an appraisal is unnecessary because the valuation is uncomplicated and the fair market value is estimated at \$10,000 or less, based on a review of available data. If an appraisal is required, the appraisal and an appraisal review will be conducted consistent with 49 CFR Part 24 (the Uniform Act).

After a determination of just compensation, GoTriangle's agent will begin negotiations with the property owner:

- A minimum of 3 attempts to settle with each property owner will be made
- GoTriangle's agent will keep a detailed negotiation diary and all other information regarding the attempted settlement
- Once a signed Offer to Purchase is secured, the agent will deliver the original documents to GoTriangle to review and process payment
- GoTriangle will complete the requisite filings in order to secure the property interest

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www.gotriangle.org

- In the event a property owner refuses to settle or negotiations reach an impasse, GoTriangle will consider amending its plans or identify a different location. At this time, GoTriangle is not requesting authorization from the board to condemn property for bus stop improvements.

Financial Impact

The Wake County transit work plan assigned \$4,440,000 for design, real estate acquisition, equipment purchase, and construction for up to 74 GoTriangle bus stops in Wake County. GoTriangle's initial estimate for property acquisition is \$5,000 per bus stop location.

Attachments

- None



AGENDA ACTION ITEM

Submitted by: Gary Tober, Real Estate and Facilities

Meeting date: February 7, 2024

SUBJECT: Durham Bus Stop Property Acquisition

Strategic Objective or Initiative Supported

2.4 Ensure an attractive and accessible transit environment

Staff Recommendation

Authorize staff to conduct early outreach and acquire the property interest needed for bus stop improvements in Durham County on behalf of the City of Durham in order to make improvements at the existing bus stop locations listed in this memorandum.

Item Summary

The Durham Transit Plan and adopted annual work plan include funding for GoTriangle to implement system wide bus stop improvements throughout Durham County to enhance safety, accessibility, and passenger comfort. The Durham County Bus Stop Improvements Program will help Durham County, the City of Durham, DCHC MPO, and GoTriangle achieve their shared goal of making all bus stops in Durham County ADA accessible. Bus stop improvements funded by this program include safety and accessibility enhancements, installation of passenger waiting facilities such as shelters and seating, and multimodal connectivity such as sidewalk connections, bike racks, and other infrastructure.

The action requested in this memo will allow GoTriangle to acquire property rights necessary to make improvements at these locations. The locations included in this request for action are listed in Attachment 1. The process to be used for acquisition is described in Attachment 2.

Financial Impact

The total authorized funding for Durham Bus Stop Improvements in the Durham Transit Work Program is \$15,029,000. To date, \$7,999,818 has been previously committed for design, construction, and other expenses, including \$5,597,340 that has been spent to date, and \$2,402,478 of committed work in progress. Real estate acquisition activities included in the program budget at an average of \$5,000 per location. No additional funds are required for this action.

Attachments

- Attachment 1: List of bus stop locations
- Attachment 2: Acquisition process

Attachment 1: Durham County bus stop locations

No.	Stop ID	Major Street	Minor Street	PIN	Parcel ID
1	1161	NC 54	Residence Inn Blvd (EB)	0738031259	153881
2	1805	NC 54	Amhurst	0728257066	152777
3	5055	Gregson St	Englewood Ave	082274220	102540
4	5060	Dearborn Dr	Ruth St	0833729606	232538
5	5063	NC 54	Residence Inn Blvd (WB)	0738032684	154279
6	5067	Mangum St	Geer St	0832100397	110053
7	5093	University Dr	South Square Mall	0810268956	196400
8	5094	Lakewood Ave	Blackwell St	0821745403	119459
9	5125	Hillsborough Rd	W Knox St	0822032752	104002
10	5138	Angier Ave	Driver St (WB)	0831620563	112475
11	5204	S Alston Ave	Dupree St (SB)	0831105376	117568
12	5211	Fulton St	Shirley St	0812825904	104574
13	5248	Guess Rd	Duke Homestead Rd (SB)	0823008365	125388
14	5311	Roxboro Rd	Maynard Ave (SB)	0832284476	119977
15	5315	NC 55	Carpenter Fletcher Rd (NB)	0738271646	219218
16	5319	Old Oxford Rd	Danube Ln (EB)	0833310956	172096
17	5387	Cornwallis Rd	Yorktown Ave (NB)	0739157756	155748
18	5400	Roxboro Rd	Channing Ave (NB)	0833302336	128700
19	5478	E Club Blvd	Miriam Cir	0832789633	129996
20	5501	Chapel Hill Rd	Chapel Ridge Apts	0821037440	108062
21	5530	Cornwallis Rd	Century Oaks Dr (NB)	0739072469	236479
22	5532	S Alston Ave	Dupree St (NB)	0831107370	117519
23	5572	Cornwallis Rd	Bainbridge Dr (SB)	0739063402	155782
24	5616	Cornwallis Rd	Yorktown Ave (SB)	0739154723	156221
25	5621	Front St	Hillandale Rd	0813807102	214191
26	5703	Guess Rd	Carver St	0823027318	125534
27	5710	Angier Ave	Carter Ave	0840174481	131126
28	5716	Hillsborough Rd	Hicks St	0822030672	104126
29	5730	Chapel Hill Rd	Crosswind Ave	0821132184	104292
30	5756	Lakewood Ave	S Mangum St (EB)	0821843431	119439
31	5820	Cornwallis Rd	Century Oaks Dr (SB)	0739071216	199222
32	5838	Cornwallis Rd	Jan Ct	0820549861	107191
33	5849	Dearborn Dr	Thelma St (SB)	0833725435	160101
34	5862	Cornwallis Rd	Bainbridge Dr (NB)	0739162808	133830
35	5881	NC 54	Fayetteville Rd (Homestead Market)	0718869332	149673
36	5904	Chapel Hill Rd	Anderson St	0811926319	103432
37	5946	Cornwallis Rd	Chapel Hill Rd (Rogers-Herr School)	0810897185	121933
38	5966	Chapel Hill Rd	Vesson Ave	0821023761	103406
39	5989	Avondale Dr	Trinity Ave (SB)	0832317453	109765
40	5993	Duke St	Trinity Ave	0822802722	197658
41	6000	NC 54	Pine Glen Trail (WB)	0728354307	152813
42	6003	Roxboro Rd	Bon Air Ave	0832296202	128826
43	6014	Roxboro St	Holloway St	0831078502	110549
44	6079	Chapel Hill St	Arnette Ave (WB)	0821585106	103274
45	6204	Guess Rd	Horton Rd (Walgreens) (SB)	0823097459	173224
46	6206	Guess Rd	Crystal Lake Rd	0823067943	173390
47	6207	Guess Rd	Bogarde St	0823046745	125834

No.	Stop ID	Major Street	Minor Street	PIN	Parcel ID
48	6261	Miami Blvd	Stirrup Creek Dr	0749404441	121990
40	5993	Duke St	Trinity Ave	0822802722	197658
41	6000	NC 54	Pine Glen Trail (WB)	0728354307	152813
42	6003	Roxboro Rd	Bon Air Ave	0832296202	128826
43	6014	Roxboro St	Holloway St	0831078502	110549
44	6079	Chapel Hill St	Arnette Ave (WB)	0821585106	103274
45	6204	Guess Rd	Horton Rd (Walgreens) (SB)	0823097459	173224
46	6206	Guess Rd	Crystal Lake Rd	0823067943	173390
47	6207	Guess Rd	Bogarde St	0823046745	125834
48	6261	Miami Blvd	Stirrup Creek Dr	0749404441	121990
49	6322	Cornwallis Rd	Roxboro Rd	0820468172	107365
50	6340	NC 55	Carpenter Fletcher Rd (SB)	0738178847	155120
51	6479	Holloway St	Ganyard Farm Way	0841930017	201416
52	6565	Angier Ave	Vine St (EB)	0831521735	112238
53	6575	Angier Ave	Bingham St (EB)	0831718322	230293
54	6600	Roxboro Rd	Dillard St	0821957887	103367
55	6607	Rose of Sharon	Riverside High School	0814627784	177338
56	6613	Roxboro Rd	Fairfield Rd (NB)	0823867560	196374

Attachment 2: Acquisition process

Following Board approval, GoTriangle's real estate team will receive the approved right-of-way plans from GoTriangle's design engineer. Depending on site conditions, GoTriangle will typically need to acquire between 50 and 500 square feet of right-of-way per bus stop. A GoTriangle agent will meet with affected property owners to explain the impacts of the improvements. Before the initiation of negotiations, the property interest to be acquired will be appraised, unless the owner is donating the property and releases GoTriangle from the appraisal obligation, or GoTriangle determines that an appraisal is unnecessary because the valuation is uncomplicated and the fair market value is estimated at \$10,000 or less, based on a review of available data. If an appraisal is required, the appraisal and an appraisal review will be conducted consistent with 49 CFR Part 24 (the Uniform Act).

After a determination of just compensation, GoTriangle's agent will begin negotiations with the property owner:

- A minimum of 3 attempts to settle with each property owner will be made
- GoTriangle's agent will keep a detailed negotiation diary and all other information regarding the attempted settlement
- Once a signed Offer to Purchase is secured, the agent will deliver the original documents to GoTriangle to review and process payment
- GoTriangle will complete the requisite filings in order to secure the property interest on behalf of the City of Durham
- In the event a property owner refuses to settle or negotiations reach an impasse, GoTriangle will consider amending its plans or identify a different location. At this time, GoTriangle is not requesting authorization from the board to condemn property for bus stop improvements



**BOARD OF TRUSTEES
AUDIT & FINANCE COMMITTEE
MEETING MINUTES**

4600 Emperor Boulevard
Suite 100
Durham, NC 27703

Wednesday, February 7, 2024

2:00 p.m.

Remote | Microsoft Teams

Board members present | Corey Branch, Susan Evans, Patrick Hannah, Brenda Howerton [arr. 2:04 p.m.], Michael Parker

Board members absent | Vivian Jones [excused], Mike Fox

The meeting was called to order at 2:02 p.m. A quorum was present.

I. Election of Committee Chair

Action: A motion was made by Branch and seconded by Parker to elect Susan Evans as committee chair. Upon vote the motion was carried unanimously.

II. Election of Committee Vice Chair

Action: A motion was made by Branch and seconded by Parker to elect Patrick Hannah as committee vice chair. Upon vote the motion was carried unanimously.

III. Adoption of Agenda

Action: A motion was made by and seconded by to adopt the agenda. Upon vote the motion was carried unanimously.

IV. FY2024 Q3 Transit Plan Amendments

Steve Schlossberg presented quarter three transit plan amendments for Wake, Durham and Orange counties. He noted that some of the county transit partners are in the meeting should any questions arise.

A. Wake County Transit

The amendments will increase the FY2024 Wake Transit Work Plan by \$8,500,000.

- City of Raleigh | Operating
increased frequency on Route 21 – Caraleigh within current allocation
- City of Raleigh | Capital
\$8,500,000 in additional contingency for New Bern Avenue BRT construction

B. Durham County Transit

The amendments will increase the FY2024 Durham Transit Work Plan by \$126,254.

- GoDurham | Operating
\$57,429 increase for salary and benefits of two new positions: Transit Construction Project Manager and Transit Construction Team Lead
- GoDurham | Capital
\$68,825 in additional funds plus reallocation of CAD/AVL remaining funds for the DIGI modem project

C. Orange County Transit

The amendments will have zero financial impact to the FY2024 Orange Transit Work Program.

- Orange County Transit Services | Operating
\$200,000 reallocation of Hillsborough Circulator 2.0 funds for purchase of Trapeze software
- Chapel Hill Transit | Operating
\$300,000 reallocated from service improvements on routes HS and CW; service improvements delayed until FY2025
- Chapel Hill Transit | Operating
\$150,000 of reallocated funds for two new positions: Planner I Transit Plan Support Staff and Bus Stop Amenities Technician
- Chapel Hill Transit | Operating
\$150,000 of reallocated funds for update to the Short Range Transit Plan
- Orange County Transit Services | Capital
\$250,000 reallocated from Mobility on Demand project for purchase of five mini vans

Action: A motion was made by Parker and seconded by Howerton to recommend board approval of the three county transit plan amendments and adopt the budget ordinance amendments. Upon vote the motion was carried unanimously.

V. Low Income Fare Program

Michelle Peele reviewed work that has been conducted over the past year for a return to fares and implementation of a low income fare program in order to mitigate impacts to low-income riders along with previously approved fare capping and an expansion of the GoPass program.

GoTriangle Proposal

- zero fare pass for eligible participants
- eligibility: proof of participation in state/federal assistance programs and proof of income requirements [150% of federal poverty level]
- identification options
- two-year renewal
- online and in-person application options including through service agencies
- GoPass branding
- Transit Plan funding to support the program

Parker asked what GoDurham and GoRaleigh will be doing about fares in FY2025. Peele responded that GoDurham will remain fare-free for FY2025 and GoRaleigh is still discussing. Branch added that he expects Raleigh to return to fares.

Parker then asked what would happen if the transit plans do not provide the funding to offset low income fare program costs. Peele replied that the partners are supportive of the program and she expects that funding requests will be approved.

Parker then asked for an estimate of revenues anticipated from the GoPass program and fareboxes in FY2025. Staff agreed to provide that information at the board meeting.

Evans asked about funding for the technology and equipment for fare collection. Peele stated that GoTriangle has been working to make those upgrades over the past year.

Parker also asked that staff look how the equity analysis process might be improved. Peele responded that the Title VI program will be reviewed and updated.

Action: A motion was made by Parker and seconded by Branch to recommend the board reinstate fares beginning July 1, 2024, and implement a low income fare program. Upon vote the motion was carried unanimously.

VI. Adjournment

Action: Chair Evans adjourned the meeting at 2:51 p.m.

Prepared by:

Michelle C. Dawson, CMC
Clerk to the Board of Trustees

AGENDA ACTION ITEM

Submitted by: Michelle Peele, Capital Development

Meeting date: February 28, 2024

SUBJECT: Return to Fares

Strategic Objective or Initiative Supported

1.3 Incorporate innovations to improve mobility and environmental stewardship

Staff Recommendation

Approve returning to fares and implementing expanded GoPass opportunities, to ensure affordability and accessibility as fares are reinstated in FY 2025.

Item Summary

As part of planning for fare reinstatement in 2023, an equity analysis was completed to determine if the proposed changes for fare resumption would have disparate impacts or place disproportionate burdens on minority and low-income populations. The analysis indicates the fare change proposal would result in minority riders paying 8% more than non-minority riders to board the bus. The fare change proposal would result in low-income riders paying 7% more than non-low-income riders to board the bus. Comparing the percentage difference impacts to the GoTriangle Board of Trustees adopted thresholds of 10%, the analysis does not identify the fare changes would have a disparate impact or disproportionate burden. Although there were no Title VI findings, the study offered mitigation strategies to be considered to reduce the barrier that paying a fare may create for low-income riders.

At its May 2023 meeting, the GoTriangle Board of Trustees voted to direct staff to proceed with planning for fare reinstatement effective July 1, 2024, and to begin preparations efforts particularly in regard to providing assistance for low-income riders.

In July 2023, GoTriangle contracted with Just Cities Collective, a minority-woman owned firm located in Durham, North Carolina, to assist the agency with the program design. The program design includes implementation strategies to create a cost effective and easy to use platform for qualifying riders.

The design includes an assessment to identify needs, challenges, and opportunities for low-income riders in GoTriangle's three-county service area. It also includes interviews with stakeholders in the region, such as transit agencies, health and human services agencies, community-based organizations, and advocacy groups, to ensure that the low-income fare program aligns with regional goals and priorities. The study provides recommendations for eligibility criteria, income thresholds, documentation requirements, and program cost estimates.

The low-income fare program will ensure equitable access to our services by providing zero fare passes for individuals facing financial constraints. This program is intended to support the goals of the agency and county transit plans while supporting equity, climate sustainability and transportation demand management by increasing access to transit and reducing barriers to regional transit opportunities.

Staff have been working diligently over the last year to prepare for fare collection in FY 2025. Ongoing work includes: testing equipment, purchasing of new equipment, development of marketing plans, plans for training staff and riders, GoPass program expansion, and extensive regional coordination.

The reintroduction of fare collection marks an important milestone in the agency's efforts to maintain the quality and sustainability of our services. After careful consideration and thorough evaluation of operations, financial projections, feedback from stakeholders, staff feels it is prudent to resume fare collections. This decision aligns with our commitment to financial sustainability, operational efficiency, and maintaining high quality service for our passengers. The temporary suspension of fare collection since 2020, was a necessary measure to prioritize the safety and wellbeing of both passengers and staff. However, as conditions have improved, staff feels confident in our ability to return to fares ensuring a smooth process for the customers.

Financial Impact

Fixed Route (bus) related fare revenue currently anticipated for FY25 is estimated at \$1.6 million dollars. This includes fare revenue produced from bus fares paid directly by riders (\$0.3M), GoPass agreements with previous GoPass institutions (\$0.8M), funds received from new GoPass participants (\$0.1M in the initial year) and the new low income or equity fare program that will be supported by the Orange, Durham and Wake County transit work plans (\$0.4M in the first year). Fare revenue will be evaluated throughout the fiscal year and will help guide future year forecasts based on actual fares received.

Attachments

- Title VI Fare Equity Analysis, March 2023
- Low Income Fare Design Report, November 2023



RETURN TO FARES

FEBRUARY 2024





OVER THE LAST YEAR STAFF HAVE BEEN WORKING TO PUT THE FARES PUZZLE BACK TOGETHER.

HISTORY



May 2019
GoTriangle Board of Trustees
Adopted a New Fare Policy

Fares - 2019	Regional	Express	Regional- FY25
Single Ride	\$2.25	\$3.00	\$2.50
Day Pass	\$4.50	\$6.00	\$5.00
7-Day	\$16.50	\$22.00	\$20.00
31-Day	\$76.50	\$102.00	\$80.00
Discount Single Ride*	\$1.00	\$1.25	\$1.25
Discount Day Pass*	\$2.00	\$2.50	\$2.50
Discount 7-Day*	\$7.50	\$9.25	\$10.00
Discount 31-Day*	\$34.00	\$42.50	\$40.00
Senior Citizens	Free	Free	Free

* Disability eligibility

MOBILE TICKETING

- Plans to implement mobile ticketing began in 2019.
- Mobile ticketing involves turning your mobile phone into both ticket machine and ticket.
- Removes the need for passengers to carry cash or wait in line to buy tickets.

Benefits

- Seamless passenger experience
- Purchase fares ahead of time reducing wait times
- Data collection improvement
- Easy to use



GOPASS - BUSINESS



Headcount		Tier I	Tier II	Tier III	
1-100	\$	1,000	\$ 2,000	\$ 5,000	Tier I = up to 1,000 rides; Tier II = up to 2,000 rides; Tier III = Unlimited
101-250	\$	2,500	\$ 5,000	\$ 12,500	Tier I = up to 2,500 rides; Tier II = up to 5,000 rides; Tier III = Unlimited
251-500	\$	5,000	\$ 10,000	\$ 25,000	Tier I = up to 5,000 rides; Tier II = up to 10,000 rides; Tier III = Unlimited

- Prior to 2020: 25 + businesses enrolled in GoPass
 - Discount transit riders to large employers
- During 2020, a study was completed that recommended a new fare structure for the program.
 - Recommendations
 - Remove minimum employee requirement
 - Develop an easy way to communicate pricing structure
 - Old way – swipes
 - New way – one flat rate recognized by number of employers

GoPass Program

Senior Citizens

Disability

Business

Universities

Youth GoPass – Transit Plan Funded

Low Income – Transit Plan Funded



Low Income Fare Program

Although there are no Title VI findings, the following mitigations are presented for consideration if the Board chooses to return to fare collection in FY25:

Mitigation Baseline – Implement board-approved fare capping

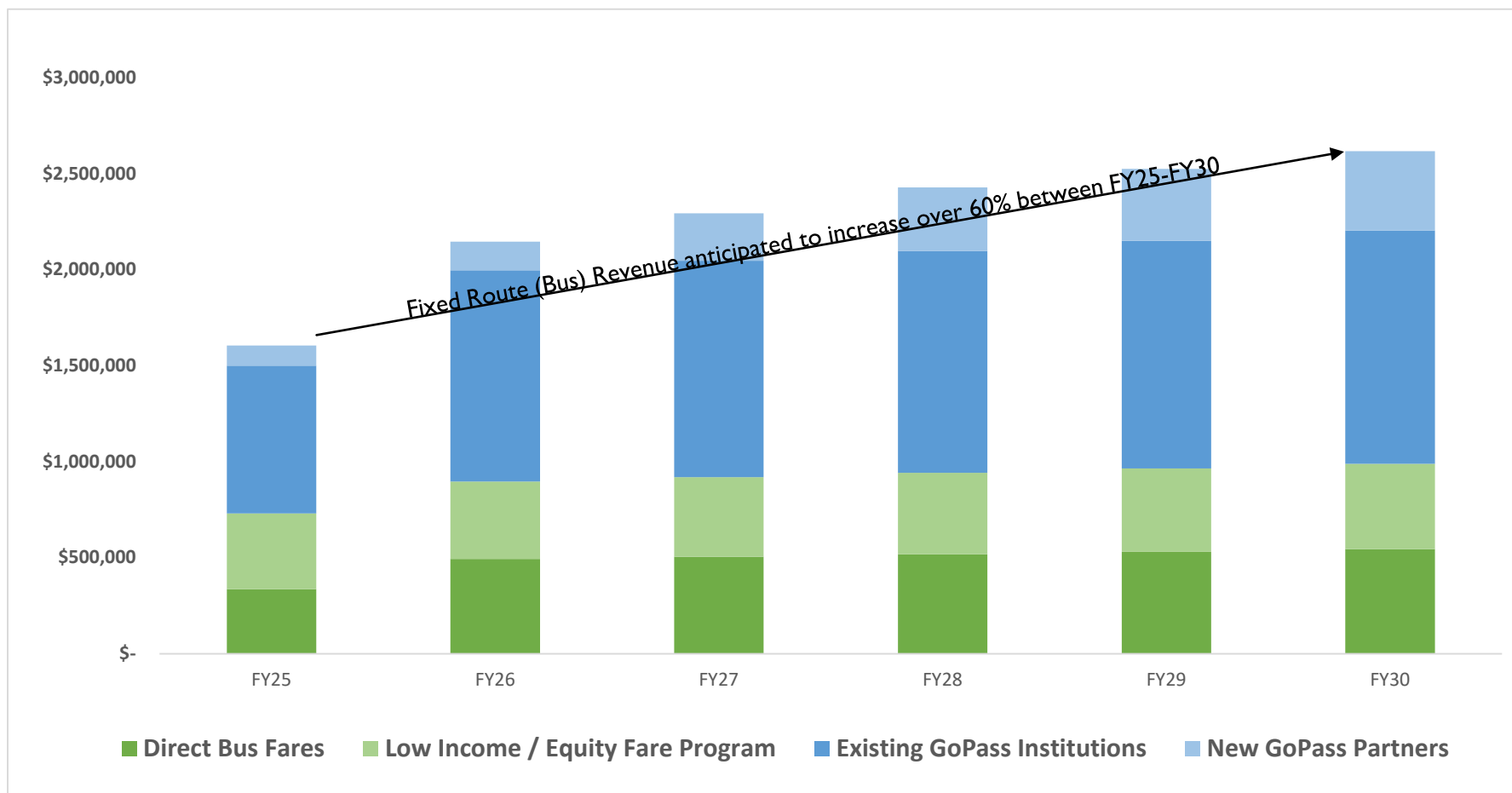
Mitigation Option #1 – Create low-income GoPass program through partnerships with Health and Human Services, Housing Authorities, and/or Jobs Access Programs

Mitigation Option #2 – Expand GoPass program to include employers and institutions with higher proportions of minority and low-income employees

Mitigation Option #3 – Ease back into fares

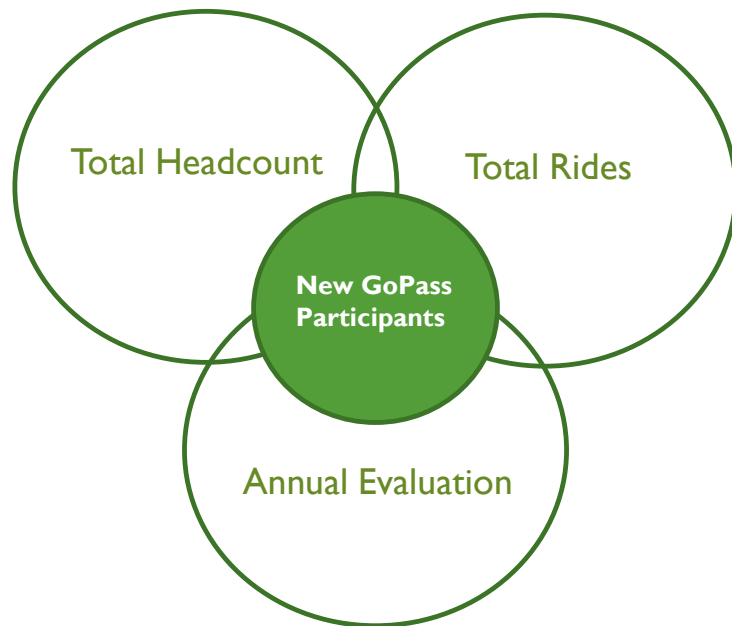


FIXED ROUTE (BUS) FARE REVENUE



NEW GOPASS PARTNER PARTICIPATION

Combination of Participant Headcount and Tier Approach



- Government Agencies
- Retail Stores/Hospitality
- Residential Communities
- Downtown Alliances
- Chamber of Commerce
- Health Systems
- Community Organizations

Key Considerations – Returning to Fares

- Revenue
 - Additional revenue can support future growth plans
- Service Improvements
 - Expansion possibilities providing more access
 - Service improvements are the most effective use of resources
- Ridership and Capacity
 - Increased ridership
 - Overcrowding prevention with new service improvements
- Passenger and Operator Experience
 - Security
 - Cleaning
 - Impacts to driver recruitment

Summary

- Staff will continue working to increase awareness of free and discounted fares among riders, the public, social service agencies, and community-based organizations
- Continue coordinating with regional agencies to ensure smooth processes



Requested Action

STAFF REQUESTS THE BOARD OF TRUSTEES TO RECOMMEND
REINSTATING FARES JULY 1, 2024, WHILE IMPLEMENTING EXPANDED
GOPASS OPPORTUNITIES.



Executive Summary

In 2014, the GoTriangle Board of Trustees adopted Title VI Policies and Definitions aligned with Federal Transit Administration (FTA) Circular 4702.1B, Title VI Requirements and Guidelines for FTA Recipients. The circular is a federal guidance document issued by FTA that outlines requirements for ensuring nondiscrimination in transit programs and activities. The circular provides guidance to recipients of federal funding, such as transit agencies, on how to comply with Title VI of the Civil Rights Act of 1964, which prohibits discrimination based on race, color, or national origin. The circular includes information on how to conduct a Title VI analysis, develop a language assistance plan, and respond to discrimination complaints, among other topics.

GoTriangle's policy requires evaluation of impacts to Title VI and low-income populations for all proposed fare changes regardless of the amount of increase or decrease. GoTriangle is currently evaluating the potential to return to collecting fares after a multi-year period of fare suspension associated with the COVID-19.

This fare equity analysis outlines the Title VI process and requirements and describes the data and methodologies used to identify the impacts. This analysis evaluates the proposed change at GoTriangle from the current zero fare to the fare structure that the GoTriangle Board of Trustees adopted in May 2019 for implementation along with mobile ticketing and fare capping, technology that automatically applies multi-ride discounts for frequent riders rather than requiring riders to purchase multi-ride passes ahead of time.

This analysis uses data about the demographics of GoTriangle's ridership from the most recent on-board survey of GoTriangle customers conducted in 2019. More than half of GoTriangle's riders are minorities and between one-third and one-half of GoTriangle's riders are low-income.

This analysis considers all fare types, including the GoPass employer discount fare program. The average fare analysis uses the ridership demographics by fare type from the 2019 GoTriangle On-Board survey to calculate the expected average fare received by GoTriangle per boarding for each demographic group and fare type.

Key Findings

While there are differences in usage rates of discount programs by minority and low-income customers compared to non-minority and non-low-income customers, there is no disparate impact and no disproportionate burden identified according to GoTriangle's policy definitions.

Even though no disparate impacts or disproportionate burden were found, mitigation strategies are proposed in the addendum to maximize access to discount fare programs for minority and low-income customers.

Background

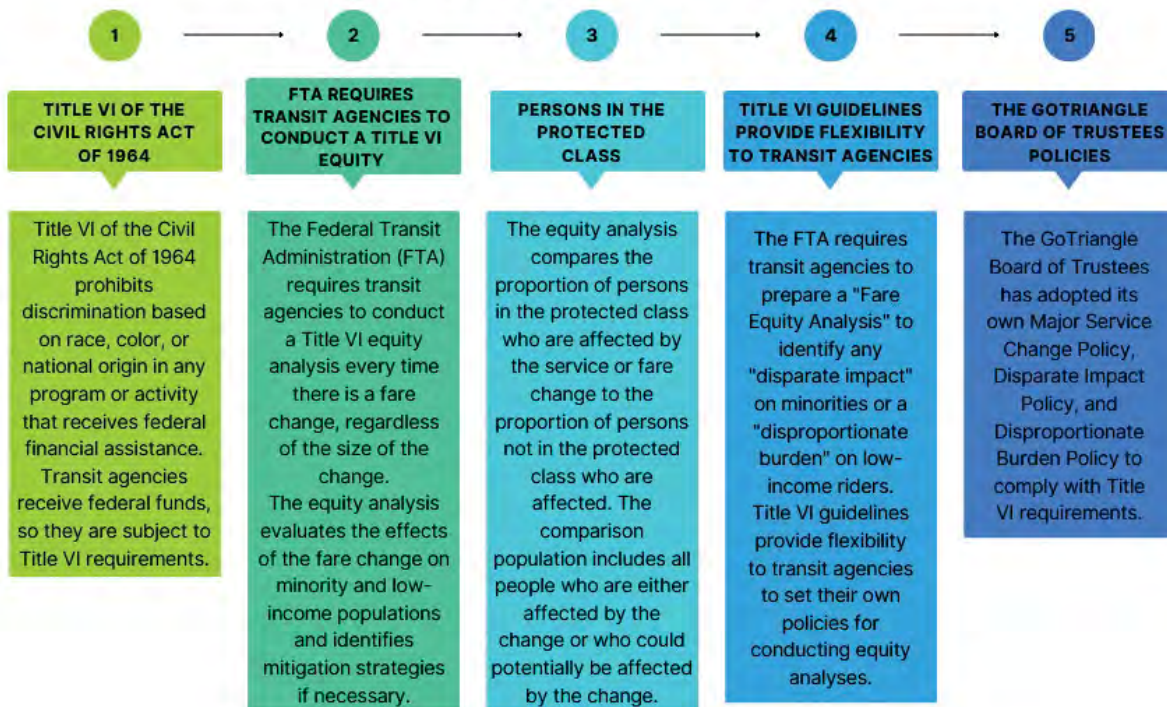
Title VI of the Civil Rights Act of 1964 prohibits discrimination on the grounds of race, color, or national origin in any program or activity that receives federal financial assistance. As transit agencies receive federal funds, they are subject to Title VI requirements. The Federal Transit Administration (FTA) requires transit agencies to conduct a Title VI equity analysis every time there is a fare change, regardless of the size of the change. The purpose of the equity analysis is to evaluate the effects of the fare change on minority and low-income populations and to identify mitigation strategies if necessary.

Title VI equity analysis compares the proportion of persons in the protected class (race, color, or national origin) who are affected by the service or fare change to the proportion of persons not in the protected class who are affected. The comparison population includes all people who are either affected by the change or who could potentially be affected by the change, such as potential passengers.

The FTA requires transit agencies to prepare a "Fare Equity Analysis" to identify any "disparate impact" on minorities or a "disproportionate burden" on low-income riders. Although low-income populations are not a protected class under Title VI, the FTA recognizes the overlap of environmental justice principles in this area and requires transit providers to evaluate the impacts of service and fare changes on passengers who are more likely to rely on public transit.

Title VI guidelines provide flexibility to transit agencies to set their own policies for conducting equity analyses. The GoTriangle Board of Trustees has adopted its own Major Service Change Policy, Disparate Impact Policy, and Disproportionate Burden Policy to comply with Title VI requirements.

Background



GoTriangle Title VI Policies

Title VI guidelines require transit agencies to set their own policies and provide flexibility to the transit agency for how these analyses are conducted. The GoTriangle Board of Trustees adopted two policies in June 2014 related to Title VI that guide this analysis:

- Disparate Impact Policy, and
- Disproportionate Burden Policy

The requirement for these policies comes from FTA Circular 4702.1B, "Title VI Requirements and Guidelines for Federal Transit Administration Recipients" which became effective October 1, 2012. The Circular requires any FTA recipient that operates 50 or more fixed route vehicles in peak service and serving a population of 200,000 persons or greater to evaluate any fare change and any major service change at the planning and programming stages to determine whether those changes have a discriminatory impact.

FTA guidelines require that impacts to Title VI and low-income populations be evaluated for all fare changes regardless of the amount of increase or decrease.

Disparate Impact Policy

Disparate Impact



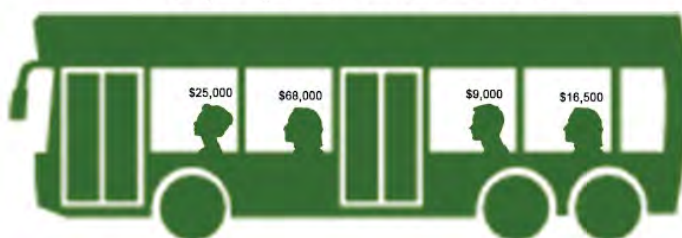
The following disparate impact policies establish thresholds for determining when impacts of proposed fare changes by each respective agency disproportionately impact minority populations. The thresholds apply to the difference in the impacts of each proposed fare change on minority

populations compared to the impacts on non-minority populations. This is measured by analyzing ridership surveys as to whether minority riders are more likely to use each mode of service, payment type, or payment media that would be subject to the fare change.

For Fare Equity Analyses, a threshold of 10 percent shall be used by GoTriangle to determine if the effects of a proposed fare change are borne disproportionately by minority populations.

Disproportionate Burden Policy

Disproportionate Burden



The following disproportionate burden policies establish thresholds for determining when impacts of proposed fare changes by each respective agency disproportionately impact low-income populations. The thresholds apply to the difference in the impacts of each proposed fare change on low-income

populations compared to the impacts on other populations. This is measured by analyzing ridership

Title VI Fare Equity Analysis
March 2023

surveys as to whether low-income riders are more likely to use each mode of service, payment type, or payment media that would be subject to the fare change.

For Fare Equity Analyses, a threshold of 10 percent shall be used by GoTriangle to determine if the effects of a proposed fare change are borne disproportionately by low-income populations.

Description of the Fare Change Proposal

At the beginning of the COVID-19 outbreak in March 2020, GoTriangle suspended bus fares to minimize contact between operators and the public, and to eliminate crowding while boarding the bus. This policy also helped ease the financial burden associated with boarding a bus. GoTriangle has continued this fare suspension through at least this fiscal year ending June 30, 2023. At its January 2023 meeting, the GoTriangle Board of Trustees voted to direct staff to complete a fare equity analysis to inform their consideration of returning to fare collection in FY 2024.

This analysis identifies the impacts of:

1. Reinstating fare collection using the fare structure that was approved by the GoTriangle Board of Trustees in May 2019
2. Reinstating the GoPass program, which allows employees and students of participating institutions to board the bus without paying a fare

GoTriangle Ridership Demographics Overview

This section provides an overview of the demographic characteristics of GoTriangle's systemwide ridership based on GoTriangle's most recent onboard survey, conducted in 2019. These demographic statistics were considered in the development of the proposed fare change in order to determine the potential for changes to result in Disparate Impacts on minority customers and/or a Disproportionate Burden on low-income customers.

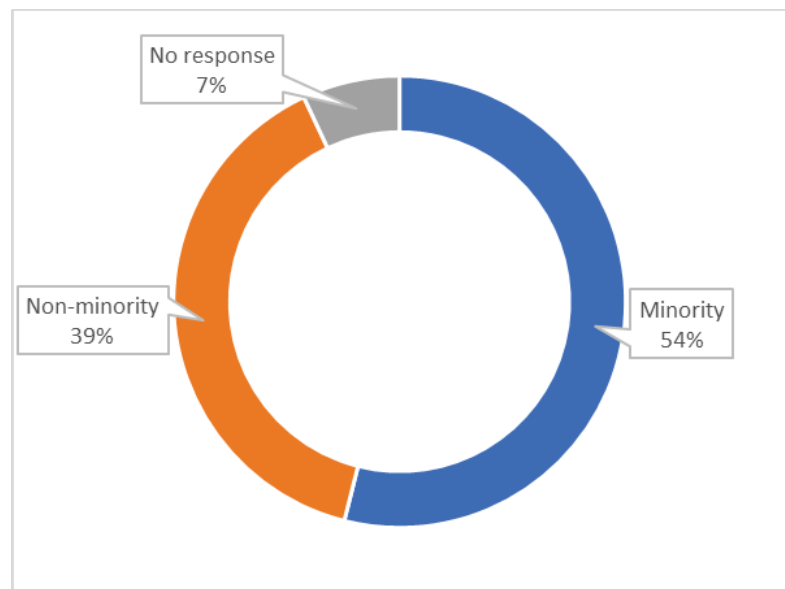
GoTriangle Ridership by Race/Ethnicity, 2019 Survey

Race/Ethnicity

The ethnicity categories in the 2019 survey were as follows:

1. African American/Black
2. Asian
3. Caucasian/White
4. Hispanic
5. Native American Indian
6. Other: _____

For purposes of this Fare Equity Analysis, minority populations are those who have not identified themselves as "White/Caucasian" in the survey.



Title VI Fare Equity Analysis
March 2023

Income Definitions

The household income categories in the 2019 survey were as follows:

1. Less than 10,000
2. 10,000 to 14,999
3. 15,000 to 19,999
4. 20,000 to 24,999
5. 25,000 to 34,999
6. 35,000 to 49,999
7. 50,000 to 74,999
8. 75,000 to 99,999
9. More than 100,000

GoTriangle's disproportionate burden policy defines low-income populations as "persons with household incomes below 150 percent of the poverty level for a regionally average household size."

Federally defined poverty levels by household size and the corresponding 150 percent amount for each are included in the table below. The average household size in each of the three counties in GoTriangle's service area is between two and three persons.¹ To provide a conservative analysis (including more people in the definition of low-income), the income level corresponding to a three-person household (\$31,995) was selected as the threshold for this analysis.

GoTriangle Ridership by Income, 2019 Survey

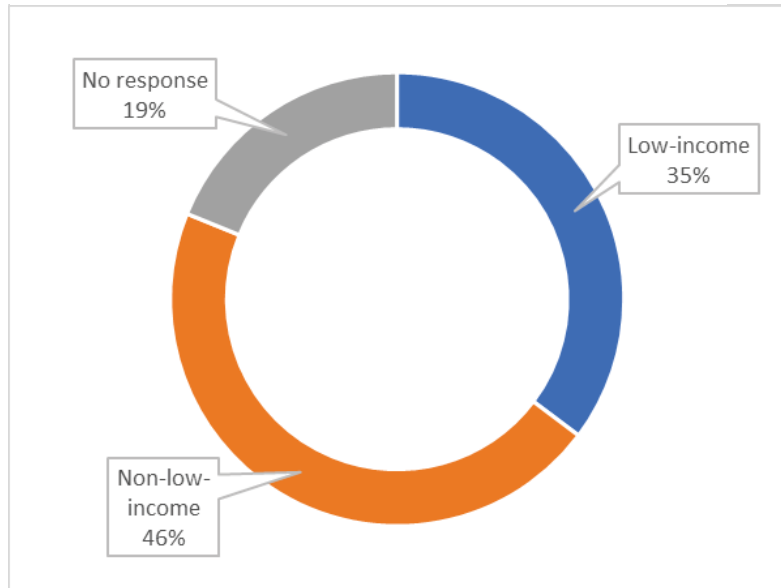
The threshold available in the 2019 survey data that corresponds most closely to the \$31,995 household income threshold is \$35,000. As such, responses indicating a household income less than \$35,000 were considered low-income.

Poverty Level Definitions

Household Size	Federally Defined Poverty Level	150% of Federally Defined Poverty Level
1	\$12,490	\$18,735
2	\$16,910	\$25,365
3	\$21,330	\$31,995
4	\$25,750	\$38,625
5	\$30,170	\$45,255
6	\$34,590	\$51,885
7	\$39,010	\$58,515
8	\$43,430	\$65,145

¹ According to data from the United States Census Bureau, the average size of households in the GoTriangle service area is as follows: 2.3 in Durham County, 2.47 in Orange County, and 2.59 in Wake County.

GoTriangle Ridership by Income, 2019 Survey



Title VI Fare Equity Analysis
March 2023

Household Size	Federally Defined Poverty Level	150% of Federally Defined Poverty Level
More than 8	For families/households with more than 8 persons, add \$4,420 for each additional person	For families/households with more than 8 persons, add \$6,630 for each additional person

***2019 Federal Poverty Level Definition²**

Ridership Demographics by Fare Payment Type

The tables below include a cross-tabulation of survey responses by fare type versus minority status, and fare type versus low-income status. Notable statistics include:

- Pre-pandemic, the GoPass was the most-used fare payment type across all customer categories
- Minority customers and low-income customers were more likely than non-minority and non-low-income customers to use cash fare, day-pass, and 7-day or 31-day pass

Fare Payment Type vs Minority Status

Fare Payment Type	Minority	Non-minority	No response	All Customers
Cash	23.2%	13.1%	9.7%	18.3%
Daypass	15.3%	7.0%	7.4%	11.5%
7-day or 31-day pass	9.9%	6.9%	8.0%	8.6%
Pre-covid GoPass	47.0%	68.9%	32.6%	54.6%
Free senior fare	2.8%	2.4%	1.1%	2.5%
No response	1.8%	1.5%	41.1%	4.4%
Grand Total	100.0%	100.0%	100.0%	100.0%

Fare Payment Type by Income Status

Fare Payment Type	Low-income	Non-low income	No response	All Customers
Cash	24.6%	13.4%	18.6%	18.3%
Daypass	17.6%	8.2%	8.2%	11.5%
7-day or 31-day pass	11.5%	6.7%	7.8%	8.6%
Pre-covid GoPass	40.6%	69.4%	44.6%	54.6%
Free senior fare	3.5%	1.4%	3.6%	2.5%
No response	2.1%	1.0%	17.1%	4.4%
Grand Total	100.0%	100.0%	100.0%	100.0%

² The federal poverty level (FPL), also known as the "poverty line," is the **amount of annualized income earned by a household**, below which they would be eligible to receive certain welfare benefits. While the U.S. Census Bureau computes the poverty threshold, the Dept. of Health and Human Services (HHS) publishes the FPL.

Title VI Fare Equity Analysis
March 2023

Average Fare Cost per Boarding Analysis

Current and Proposed Fares Overview and Inputs

In March 2020, GoTriangle suspended bus fares to minimize contact between bus operators and the public, and to eliminate crowding while boarding the bus. This policy also helped ease the financial burden associated with boarding a bus. GoTriangle has previously committed to continuing to suspend fares through at least June 30, 2023.

As part of the FY24 budget process, GoTriangle is considering ending the suspension and implementing the fare structure that the GoTriangle Board of Trustees had previously adopted in May 2019 for implementation along with mobile ticketing and fare capping, technology that automatically applies multi-ride discounts for frequent riders rather than requiring riders to purchase multi-ride passes ahead of time.

Fare Category	Fare Cost
Single-Ride Adult Fare - Regional	\$2.50
Single-Ride Adult Fare - Express	\$2.50
Single-Ride Disability Fare - Regional	\$1.25
Single-Ride Disability Fare - Express	\$1.25
Single-Ride Senior Fare - Regional	\$0.00
Single-Ride Senior Fare - Express	\$0.00
Stored Value Card - Regional	\$2.00
Stored Value Card - Express	\$2.00
Regional Day Pass	\$5.00
Regional 7-Day Pass	\$24.00
Regional 31-Day Pass	\$80.00
Express Day Pass	\$5.00
Express 7-Day Pass	\$24.00
Express 31-Day Pass	\$80.00
University or Employer Provided GoPass	\$0.00

May 2019 Adopted Fare Structure

Considering GoPass as Discount Program

This method considers fare revenue received by GoTriangle for each boarding; in other words, GoPass as a discount program rather than zero fare. For the pre-pandemic GoPass, GoTriangle generally received revenue from partner institutions equivalent to 55% of the cash fare for each GoPass boarding.

With this methodology the expected average fare received by GoTriangle is \$1.38 for each GoPass boarding.

2019 Average Fare per Boarding

This analysis calculates average fare per boarding for different groups using data from the 2019 survey to better understand transit costs. This was done by adding up the fare cost relative to the fare usage including all types of fares, and dividing it by the total number of fare usages, also including all fare types, for that group. An example calculation is included in the table below. This methodology provides a calculation of the average fare cost per boarding for each group, which can help provide insight into the financial burden of transit for different groups relative to the Board policy thresholds.

	Example Group A	Example Group B
Example Total Fare Cost	\$1,500	\$2,000
Example Total Fare Usage	460 Riders	560 Riders
Example Average Fare per Boarding	\$3.26	\$3.57

Title VI Fare Equity Analysis
March 2023

Disparate Impact Analysis

Typically, a disparate impact analysis compares the percentage increase in fares for minority customers with the percentage increase in fares for non-minority customers. In this case, because the current fare is zero, the absolute increase (rather than percentage increase) is used in the analysis, and the results are compared for minority and non-minority customers.

Without mitigation, the fare proposal to return to fares would expect to result in a fare increase for minority customers that is 8% higher for non-minority customers.

Based on the 2019 GoTriangle On-Board Survey data, minority riders had an average fare per boarding of \$1.62, while non-minority riders had an average fare per boarding of \$1.49, which included all fare types used to board the bus. The tables below include the detailed calculations for how each fare type cost affects the average for per boarding amount.

Disparate Impact Analysis

	Minority	Non-minority	No response	System Average
Existing Fare Per Boarding	\$0.00	\$0.00	\$0.00	\$0.00
2019 Average Fare per Boarding	\$1.62	\$1.49	\$1.53	\$1.57
% of System Average Increase	103%	95%	98%	
Difference	+8%			

Race/Ethnic Group Fare Usage per the 2019 GoTriangle On-Board Survey

Row Labels	Minority		Non-minority		No response		All Customers	
Cash	314	68%	129	28%	17	3%	460	100
Day Pass	207	72%	69	24%	13	4%	289	100
7-day or 31-day pass	134	62%	68	31%	14	6%	216	100
Pre-covid GoPass	637	46%	676	49%	57	4%	1370	100
Free senior fare	38	59%	24	38%	2	3%	64	100
Grand Total	1330	55%	966	42%	103	4%	2399	100

Title VI Fare Equity Analysis
March 2023

Race/Ethnic Group Total Fare Cost relative to Fare Usage & Average Cost per Boarding per the 2019 GoTriangle On-Board Survey

Row Labels	Minority		Non-minority		No response		All Customers	
Cash	\$785.0	68%	\$322.50	28%	\$42.50	3%	\$1,150.0	%100
Daypass	\$345.0	72%	\$115.00	24%	\$21.67	4%	\$481.67	%100
7-day or 31-day pass	\$148.8	62%	\$75.56	31%	\$15.56	6%	\$240.00	%100
Pre-covid GoPass	\$875.8	46%	\$929.50	49%	\$78.38	4%	\$1,883.7	100%
Free senior fare	\$0.00	59%	\$0.00	38%	\$0.00	3%	\$0.00	100%
Grand Total	\$2,154.76	55%	\$1,442.5	42%	\$158.10	4%	\$3,755.4	100%

Disproportionate Burden Analysis

Typically, a disproportionate burden analysis compares the percentage increase in fares for low-income customers with the percentage increase in fares for non-low-income customers. In this case, because the current fare is zero, the absolute increase (rather than percentage increase) is used in the analysis, and the results are compared for low-income and non-low-income customers.

Without mitigation, the fare proposal would be expected to result in a fare increase for low-income customers that is 7% higher for non-low-income customers.

Based on the 2019 GoTriangle On-Board Survey data, low-income riders had an average fare per boarding of \$1.63, while non-low-income riders had an average fare per boarding of \$1.51, which included all fare types used to board the bus. The tables below include the detailed calculations for how each fare type cost affects the average for per boarding amount.

Disproportionate Burden Analysis

	Low income	Non-low income	No response	System Average
Existing Fare Per Boarding	\$0.00	\$0.00	\$0.00	\$0.00
2019 Average Fare per Boarding	\$1.63	\$1.51	\$1.57	\$1.57
% of System Average Increase	104%	97%	100%	
Difference	+7%			

Income Group Fare Usage per the 2019 GoTriangle On-Board Survey

	Low income		Non-low income		No response		All Customers	
Cash	218	47%	154	33%	88	19%	460	100%
Daypass	156	54%	94	33%	39	13%	289	100%
7-day or 31-day pass	102	47%	77	36%	37	17%	216	100%

Title VI Fare Equity Analysis
March 2023

	Low income		Non-low income		No response		All Customers	
Pre-covid GoPass	359	26%	800	58%	211	15%	1370	100%
Free senior fare	31	48%	16	25%	17	27%	64	100%
Grand Total	866	36%	1141	48%	392	16%	2399	100%

Income Group Total Fare Cost relative to Fare Usage & Average Cost per Boarding per the 2019 GoTriangle On-Board Survey

	Low income		Non-low income		No response		All Customers	
Cash	\$545.00	47%	\$385.00	33%	\$220.00	19%	\$1,150.00	100%
Daypass	\$260.00	54%	\$156.67	33%	\$65.00	13%	\$481.67	100%
7-day or 31-day pass	\$113.33	47%	\$85.56	36%	\$41.11	17%	\$240.00	100%
Pre-covid GoPass	\$493.63	26%	\$1,100.00	58%	\$290.13	15%	\$1,883.75	100%
Free senior fare	\$0.00	48%	\$0.00	25%	\$0.00	27%	\$0.00	100%
Grand Total	\$1,411.96	36%	\$1,727.22	48%	\$616.24	16%	\$3,755.42	100%

Conclusions

Returning to fares does not trigger disproportionate impact or disparate impact findings. However, GoTriangle staff is committed to exploring voluntary mitigation options to reduce the gap between the low-income and non-low-income groups and the minority and non-minority groups if GoTriangle returns to collecting fares. A description of recommended voluntary mitigation measures are included in the addendum to this report.

Mitigation Addendum

Title VI Fare Equity Analysis March 2023

In Title VI, mitigation refers to actions taken by recipients of federal funding, such as transit agencies, to address any adverse impacts of their programs or activities on individuals or communities protected by Title VI (i.e., those who belong to a race, color, or national origin group). Mitigation measures can include steps to eliminate, reduce, or avoid any discriminatory effects of a program or activity, or to provide compensatory benefits to affected individuals or communities. For example, a transit agency may undertake a fare equity analysis to ensure that its fare policies do not disproportionately burden low-income and minority riders and may implement fare subsidy programs or other measures to address any such disparities. Even though no disproportionate burden or disparate impacts meeting GoTriangle's board-established thresholds were found in the Title VI Fare Equity Analysis, voluntary mitigation strategies are still suggested to minimize the impact of returning to fares on low-income customers and increase usage of the GoPass program by low-income and minority customers.

Mitigation Baseline – Implement Board Approved Fare Capping

In 2019, the Board approved a proposal that would introduce mobile ticketing and fare capping, technology that automatically applies multi-ride discounts for frequent riders rather than requiring riders to purchase multi-ride passes ahead of time. Fare capping sets a maximum limit on the amount each passenger pays for rides within a specific timeframe. This ensures that a rider paying fares incrementally each time they ride does not pay more relative to customers who purchase bulk daily, weekly, or monthly passes in advance. It promotes social equity, affordability, encourages public transportation over private vehicles, reduces traffic congestion and pollution, increases customer satisfaction, and helps to stabilize revenue for transportation agencies.

If GoTriangle returns to fare collection, staff is prepared to launch its mobile ticketing program with fare capping. Riders will have the option to use a smartphone app for payment, or obtain a physical card to access the program. Physical cards and in-app accounts can be pre-loaded with funds online using credit or debit cards, and can be loaded with cash at a network of retail partners including Walmart, Dollar General, and CVS.

Riders will continue to have the option of paying fares with cash without an account, but in that case would not benefit from fare capping discounts.

Mitigation #1 – Create low-income GoPass pilot program through partnerships with Health and Human Services, Housing Authorities, and/or Jobs Access Programs

Providing GoPasses to riders who qualify based on income verification is a key opportunity for GoTriangle to support low-income customers and ensure that public transportation remains accessible for everyone in the community without fare being barrier. These passes would ensure that riders maintain to access job opportunities, medical appointments, and other vital resources that may otherwise become difficult or impossible to reach without affordable, reliable transportation.

GoTriangle did not previously have GoPass partnerships with jobs access programs, low-income housing providers, or major health and human services agencies. Nationally, these agencies are often key purchasers of transit fares and passes to help remove transportation barriers to new job opportunities.

Title VI Fare Equity Analysis
March 2023

GoTriangle staff has already begun exploring the potential for partnerships with agencies serving low-income residents to identify opportunities for collaboration and develop strategies to include them as GoPass customers. If a decision is made to return to fare collection, staff will seek funding for a low-income GoPass pilot program through the county transit plans.

Mitigation #2 – Expand traditional GoPass program to include employers and institutions with higher proportions of minority and low-income employees.

The GoPass is a critical program for GoTriangle's budget and has been successful in supporting ridership for major employers, particularly the region's major institutions including UNC, Duke University, NCSU, and state government. However, historically, non-low-income and non-minorities were more likely to use the GoPass.

If a decision is made to return to fare collection, GoTriangle will broaden the traditional GoPass program to be accessible to more employers (not just large employers) and other types of groups (residential complexes, community groups, etc), and develop strategies to market the program more broadly. GoTriangle will also develop outreach strategies to market the program specifically to lower-wage employers and employees, institutions, and groups with higher ratios of minority populations.

NOVEMBER 2023

GOTRIANGLE LOW-INCOME FARE DESIGN RESEARCH



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PROJECT OVERVIEW

Project Background

Due to the COVID-19 pandemic, GoTriangle has been fare free since March 2020. As federal funds that have allowed transit agencies like GoTriangle to remain fare free expire or are exhausted, the agency is considering whether and how to return to fare collection.

Should GoTriangle's Board of Trustees choose to approve returning to fares during the FY25 budget process, the information in this report can be used to support the design and implementation of a low-income fare program that would allow eligible riders to continue ride GoTriangle buses for free.

Program Design Goals

Goals for the low-income fare design process include:

- Program should be designed with input from target users
- Program should be based on equitable eligibility criteria
- Program should be easy to use
- Program should be cost-effective for GoTriangle

Reasons for Creating a Low-Income Fare Program



Support local and regional goals related to equity, climate sustainability, and Transportation Demand Management



Increase transit ridership



Remove barriers to regional travel for low-income riders

Stakeholder Concerns

All stakeholders I spoke to during the research process were supportive of a program that would allow GoTriangle riders with low incomes to continue to ride for free. However, many stakeholders shared concerns about the development of such a program, including:

- It might stigmatize low-income riders
- It might lead to more people riding without a destination
- It will be complex to administer the program regionally and increase administrative burdens for transit agencies
- There will be a trade-off between paying for the program and service quality/expansion
- It might be underutilized
- It might be better to remain fare-free



POVERTY & BEHAVIORAL POLICY

Poor people are just as good at making decisions as anyone else, but lack the resources to be able to live up to their full decision-making potential. By recognizing the threat that a lack of resources poses to our decision-making skills, we can help those at the bottom of our financial ladder make decisions that can propel them upward. – Mullainathan & Shafir, **Scarcity**, 2013

The Tunneling & Bandwidth Taxes

In their book **Scarcity: Why Having Too Little Means So Much**, Mullainathan & Shafir argue that the poor face both a “tunneling tax” and a “bandwidth tax” because they must constantly contend with the effects of scarcity or a lack of resources.

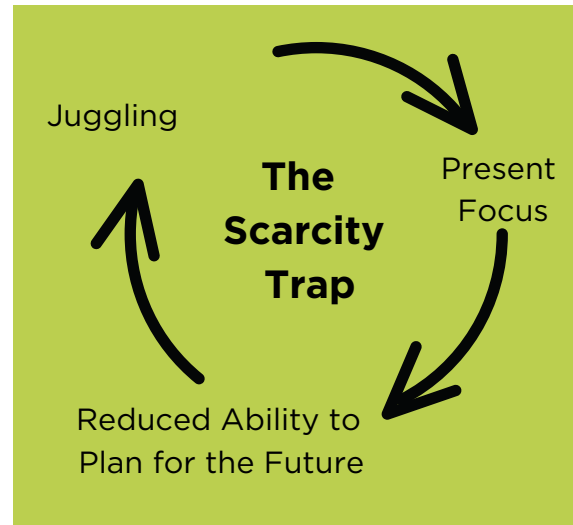
Tunneling, meant to suggest tunnel vision, refers to intensely focusing on an aspect of something that is going on and neglecting what is going on outside of the tunnel. The tunneling tax refers to the negative consequences someone might experience because of tunneling. An example of the tunneling tax might be focusing on obtaining enough food for your family with a limited grocery budget and as a result, missing the deadline to submit paperwork that would ensure the renewal of your family’s subsidized health benefits.

The bandwidth tax refers to the greater demands that the poor face on their cognitive capacity and executive function because they must constantly contend with stressors induced by scarcity. Cognitive function refers to “our ability to solve problems, retain information, and engage in logical reasoning,” while executive control refers to “our ability to manage our cognitive activities, including planning, attention, initiating and inhibiting actions, and controlling impulses.”

The Effect of the Tunneling & Bandwidth Taxes

Together, the tunneling and bandwidth taxes lead to:

- A focus on present needs
- Reduced capacity to plan for the future
- Juggling or moving from one pressing task to another
- A cyclical trap – the above create a cycle or what Mullainathan & Shafir call the **Scarcity Trap**, the factors that make it difficult to improve one's financial circumstances



Responding to the Tunneling & Bandwidth Taxes

Research shows that policy makers can respond to the tunneling and bandwidth taxes by:

- Simplifying procedures & reducing the hassle of participating in programs designed for people with low incomes
- Addressing details in bureaucracies, technologies, and service delivery
- Sharing testimonials to encourage people to sign up for programs and services
- Framing interventions as opportunities instead of as aid

Tunneling, Bandwidth & Low-Income Fare Design


We can respond to the tunneling and bandwidth taxes by removing barriers to participation in a low-income fare program.

This might look like:

- Automatically opting people into a program instead of having them jump through many hoops to participate
- Proactively notifying eligible customers that the program exists, and they are eligible to participate
- Ensuring that people do not have to go out of their way to apply for or participate in the program (e.g., online sign-up or sign-up events at the bus station)
- Simplifying application procedures and not requiring excessive documentation to participate in the program
- Proactively notifying customers that their pass is about to expire and creating a simplified procedure for pass renewal



INTRODUCTION



In 2020, 17 of 50 of the country's largest transit agencies had reduced-fare programs for low-income riders, with many offering discounts of at least 50% for those with incomes at or below between 125% to 200% of the federal poverty level (Darling et al., 2021). These programs aim to address the disproportionate financial burden of transit costs on low-income people, for whom transit fares can consume a large portion of their incomes. Although implementation of these programs can be challenging, low-income fare discount programs may increase equitable outcomes for transit riders and have the potential to increase the efficiency of the transit system.

Low-income transit riders make up a significant proportion of overall transit users in the United States, with many relying on public transportation due to a lack of car ownership (Darling et al., 2021). Additionally, low-income individuals may face difficulties affording transit fares, particularly when required to make upfront payments for monthly passes (Barajas, Chatman, & Agrawal, 2016).

Programs that reduce or eliminate transit fares have been shown to increase transit ridership. Several studies, including a randomized controlled study by Rosenblum (2020) on the impact of a 50% discounted transit fare program for low-income individuals in Boston, show that such programs lead to a significant increase in the number of trips taken, particularly to health care and social service destinations. Rosenblum (2020) found that “low-income riders take proportionally more off-peak trips and African Americans have longer commutes even controlling for income.”

In their randomized controlled study, Brough et al. (2022) found that “providing fare-free public transit to low-income individuals increases boardings with a transit card by about 1 per day, relative to a baseline policy requiring \$1.50 per bus or train ride.” The researchers also found that free fares can increase the efficiency of the transit system as free fares for the treatment group increased “boardings primarily during off-peak hours during the workweek and along transit routes that are not already crowded” (Brough et al., 2022).

The implementation of low-income and zero-fare programs which allow some customers to ride for free may lead to challenges such as passengers riding without a destination or causing disturbances, although such programs eliminate fare disputes and can minimize conflict between bus operators and passengers (MCDOT, 2021).

Despite these challenges, existing research highlights the importance of implementing and refining low-income fare programs to alleviate financial burdens on low-income transit riders and encourage greater use of public transportation, especially for accessing essential services.



RIDER PERSONA

About Persona Profiles

- Should include a portrait image, name, and demographic information
- Not a stereotype, but an archetype based on research
- Help the design team to build empathy with the user group

According to the 2023 GoTriangle OnBoard Survey:

- 32% of riders make less than \$15,000
- 42% of riders are African American
- 26% of riders are between the ages of 25-34
- 60% of riders have no vehicle in their household
- 56% of riders identify as male
- 30% of riders ride 5 days a week
- 65% of riders use GoTriangle to get to work
- 99% of riders have a cell phone
- 63% of riders work/go to school onsite only
- 90% of riders primarily speak English at home



Marcus*

GoTriangle Rider Persona

Based on the 2023 Onboard Survey and rider contextual interviews, a GoTriangle rider who might apply for and use a low-income fare program may be:

- An African American male of about 30 years old
- Have no car in their household
- Make less than \$15,000 a year
- Ride GoTriangle five days a week to get to work

*Image is AI generated using Canva's Magic Studio



RESEARCH SYNTHESIS

National Low-Income Fare Programs

I reviewed 11 low-income fare programs for this effort. While many programs seemed designed with equity in mind, others introduced potential barriers to participation.

Equity best practices include:

- Offering multiple ways to apply for the program including through partners, online, over the phone, and in-person
- Accepting many forms of proof of identity
- Accepting many forms of proof of income
- Allowing self-certification of income
- Not requiring an address to participate
- Having an extended renewal period
- Offering information and application materials in multiple languages

Potential barriers to participation include:

- Charging fees (e.g., \$10 charged by RIPTA, only accepted in the form of a money order, credit or debit)
- Requiring a photo and charging a fee for that photo
- Requiring an address to participate in the program because users may face housing instability

National Low-Income Fare Programs Reviewed

Agency	Equity Features
<u>Ann Arbor The Ride</u>	Applications available in 5 languages
<u>Arlington Transit</u>	SNAP/TANF recipients notified of program pilot eligibility
<u>Denver RTD</u>	If you are enrolled in a benefits program, you may not need to provide income verification; Partner Toolkit
<u>King County Metro Orca Lift</u>	Information/applications available in eight languages; exhaustive list of IDs and proof of income accepted
<u>LA County Metro L.I.F.E.</u>	90-Day free pass for signing up, sign up events, application in 8 languages
<u>Marin Transit LIFA</u>	Application in two languages
<u>Minneapolis/St. Paul Metro</u>	Accepts expired ID, in-person sign-up events, exhaustive IDs and proof of income accepted; TAP Distribution partners
<u>Portland Trimet</u>	Sign-up events, first month free
<u>Rhode Island Public Transit Authority</u>	Fare free for two years
<u>Salt Lake City UTA</u>	Qualification based on income level or participation in one of seven benefits assistance programs
<u>Sound Transit/King County Metro Subsidized Annual Pass</u>	Fare free for 1 year; apply using ProviderOne number

Fare Discount

Darling et al. (2021) found that many agencies offer discounts of at least 50% for those with incomes at or below 125% to 200% of the federal poverty level. I found a wide variation in the fare discounts offered. Because many programs are administered regionally, as was the case with King County and LA County, there were sometimes multiple discounts offered within a single program depending on whether a rider was using a local or regional service and the mode of transit used.

Fare Medium

Darling et al. found that 10 of 12 programs use a fare card that automatically applies a discount once cash is added to the card.

Some programs use a combination of a fare card and a special program ID card.

- Participants in Muni's program use an ID card and purchase a new sticker to apply to the ID card monthly. A Muni station agent inspects the ID card with sticker every time transit is used. (Darling et al., 2021)
- RTD's LiVE and Rhode Island Transit's RIPTA program also use both an ID card and a fare card

The combination of a fare card and an ID card is a fraud reduction mechanism in that it is one way to ensure that the person who is issued the card is not sharing it with others who may not be eligible for the program.

GoTriangle should weigh the fact that the combination of an ID card and a fare card might be burdensome for riders and introduce administrative complexity to the program.

Discounts Offered By Agencies

Agency	Discount Offered
<u>Ann Arbor The Ride</u>	Unspecified discounted rate
<u>Arlington Transit</u>	Free rides up to \$150 dollars
<u>Denver RTD</u>	40% on fares through RTD service area
<u>King County Metro Orca Lift</u>	\$1 fare on Metro and many other transit systems
<u>LA County Metro L.I.F.E.</u>	Free 90 discount pass, fare capping, 20 free regional rides; various discounts at 13 transit agencies
<u>Marin Transit LIFA</u>	\$75 of credit per quarter for trips on local Paratransit and Marin Access Shuttles and no base fare of \$5 per trip for trips on <u>Catch-A-Ride</u> . Eligible riders can opt-in to receive a free pass to use on Marin Transit local bus service.
<u>Minneapolis/St. Paul Metro</u>	\$1 transit fares
<u>Portland Trimet</u>	\$1.25 per ride or \$28 a month for unlimited rides; 1st month free
<u>Rhode Island Public Transit Authority</u>	Free for 2 years
<u>Salt Lake City UTA</u>	50% off Farepay Fares
<u>Sound Transit/King County Metro Subsidized Annual Pass</u>	Free transit fares for 1 year

Program Eligibility

Nationally, eligibility for low-income fare programs range from 80-200% of the federal poverty level.

Other eligibility criteria include:

- Being in a certain age range; seniors and youth tend to be eligible for other programs
- Residency in service area
 - Darling et al. found that ORCA Lift was the only program without a residency requirement
- Eligibility is sometimes tied to participation in public assistance programs such as SNAP, TANF, or WIC

Tiered Eligibility

Tiered eligibility, or having different income thresholds with different benefits, was somewhat uncommon possibly because such an approach increases the administrative complexity of programs. I encountered only two programs that offered tiered eligibility in my research.

King County Metro/Sound Transit

King County and Sound Transit offer two programs:

- ORCA Lift for people at 200% or below of the federal poverty level
- Subsidized Annual Pass for people 80% or below of the poverty level

Miami-Dade Transit

Darling et al. (2021) found that Miami-Dade Transit also uses a tiered approach. Riders between 150% and 200% of the 2020 federal poverty level could enroll in the Commuter-Reduced Fare program and receive 50% off the transit fare; while riders at or below 150% of the federal poverty level could enroll in the Mobility EASY Card program and receive completely free transit fares.

Income Thresholds Used By Agencies

Agency	Low-Income Threshold
Arlington Transit	SNAP/TANF Recipients
Denver RTD	185% of federal poverty level
King County Metro/Sound Transit	200% for ORCA Lift, 80% for Subsidized Annual Pass
LA County Metro	Household size = 1, Annual Income = \$44,150 or less Household size = 2, Annual Income = \$50,450 or less Household size = 3, Annual Income = \$56,750 or less Household size = 4, Annual Income = \$63,050 or less
Minneapolis/St. Paul Metro	50% AMI or 185% of federal poverty level
Portland Trimet	Participation in a public assistance program or income less than 2x the poverty level

Proof of Income

Allowing the use of a broad range of documents to show income eligibility is one way that GoTriangle can reduce barriers for those wishing to participate in the program. The highest quality programs offer an exhaustive list of documents that can be used to show income eligibility. LA County Metro was the only agency I encountered that allows self-certification as proof of income.

GoTriangle Riders and Proof of Income

When asked how they would prefer to show proof of income to apply for a low-income fare pass, GoTriangle riders shared:

- One rider said he would show evidence related to his direct deposit
- Two riders stated that they would use their pay stub
- One rider shared that he was drawing SSI and it would be easiest to show SSI paperwork
- One rider shared that he wouldn't have issues providing income verification, but was unsure how she would prefer to do so
- One rider shared that he had no income
- One rider shared that he recently had his backpack stolen and has lost all of his ID documents; "they would need to find out from the IRS" he said when asked about how he would show proof of income

Documents Used for Income Verification by Agencies

Banking	Benefits	Employment	Housing	Other
<ul style="list-style-type: none"> Bank statement indicating direct deposits from the U.S. Treasury Bank statement showing employer direct deposit 	<ul style="list-style-type: none"> Benefit summary letter Department of Health and Human Services client number (e.g., Provider One Card in Oregon) EBT Number or verification letter Energy assistance approval letter Medicaid card Medicare card or authorization from a participating social services agency Most recent (3) financial assistance documents SNAP eligibility letter Social Security Award (SSI/Retirement award letter) TANF eligibility letter WIC participation evidence (screen capture from WIC app, participant summary, etc.) 	<ul style="list-style-type: none"> Evidence of participation in an unemployment insurance program Pay stubs (previous or from the past three months) Evidence of participation in a workforce development program Wages and tax statement (ex. 1099 or W-2) If paid in cash, a statement signed and dated by employer stating gross income for the last 30 days; or a bank statement showing money deposited into your account (King County) Gig Workers (Uber, Lyft, Door Dash): proof of your income (after expenses) for last 30 days (King County) 	<ul style="list-style-type: none"> Housing authority certificate or proof of participation in Section 8 programming Lease agreement 	<ul style="list-style-type: none"> Financial aid letter (students) Free and reduced lunch approval letter Proof of participation in subsidized healthcare program Self-certification

Proof of Identity

Accepting a broad range of identity documents can also reduce barriers for potential program applicants.

Typical identification requirements include:

- Driver's license (any state or country)
- Photo ID card from any state, province, county or country
- Armed Services ID with photo
- ID card from any foreign consulate
- Passport from any country
- School photo ID—university/college
- Tribal ID
- US certificate of citizenship, naturalization (with signature and photo), or refugee status

Orca Lift

Allows a combination of two or more non-government-issued document with name and a photo of you as an adult, and a document that indicates your name and birthdate, such as:

- Adoption papers
- Baptismal records
- Birth certificate
- Border crossing card
- Court order
- DHS "Trusted Traveler" cards (NEXUS, SENTRI, FAST)
- Driver's instruction permit
- DSHS identification letter for those in custodianship
- Employee ID card
- Immigration ID
- Marriage license
- School records / transcript (certified)
- Social Security card
- Transportation Worker Identification Credential (TWIC)
- Unemployment card

Minneapolis/St. Paul Metro

Minneapolis/St. Paul Metro allows any form of identification that can be used for same-day voting including:

- Minnesota university, college or technical college ID
- Minnesota high school ID
- Bill, account or start-of-service statement due or dated within 30 days of the election for:
 - Phone, TV or internet
 - Solid waste, sewer, electric, gas or water
 - Banking or credit card
 - Rent or mortgage
- Residential lease or rent agreement valid through Election Day
- Current student fee statement

They also accept expired forms of identification.

Renewal Period



Five of the 12 programs reviewed by Darling et al. (2021) require participants to re-enroll annually and four of the programs require participants to re-enroll every 2 years. Most programs reviewed for this effort similarly required renewal of discount passes/IDs every one to two years.

Renewal Period for Agencies

Agency	Renewal Period
King County Metro	2 years
Minneapolis/St. Paul Metro	1 year
Rhode Island Public Transit Authority	2 years
UTA Salt Lake City	1 year

Application Method

Most programs provide a combination of online and in-person applications. Over-the-phone and mail-in applications were less common. In their research, Darling et al. (2021) found three programs that allowed applications only through partner social service agencies.

Minneapolis/St. Paul Metro and RTD had programs where social service providers and non-profits could apply to become partners and accept applications on behalf of the transit agency

GoTriangle Riders on their Preferred Application Method

When asked how they would prefer to apply for the low-income fare program:

- Seven GoTriangle riders stated that they would prefer to apply online or with their mobile devices
 - One of these riders stated applying in-person was their second preference
 - One of these riders stated applying via a phone call was their second preference
- Three GoTriangle riders stated that they would be willing to apply via any method
- Two GoTriangle riders said they would prefer to apply in-person
 - One of these riders stated a secondary preference for applying via a phone call

GoTriangle Riders on their Preferred Application Location


When asked where they would prefer to apply for the low-income fare program:

- Nine riders said they would prefer to apply for the program at the bus station
 - One rider specified GoRaleigh Station
 - One rider specified Durham Station
 - Two riders specified the Regional Transit Center
- One rider said they would not apply for the program if they had to do so in person.
- One rider stated that they would prefer to apply for the program at the library
- One rider shared that he was unhoused and trying to get services through the South Wilmington Street Men's Center. He shared that it might be helpful to get a pass through the center.

Application Methods Offered by Agencies

Agency	Online	In-Person	Phone	Mail	Partner Agency
Ann Arbor The Ride		x			
Arlington Transit		x			
Denver RTD	x		x		x
King County Metro Orca Lift	x	x	x		
LA County Metro	x	x		x	x
Marin Transit	x		x	x	
Minneapolis/ St. Paul Metro	x	x			x
Portland Trimet	x	x			x
Rhode Island Public Transit Authority		x		x	
Salt Lake City UTA	x	x			
Sound Transit/King County Metro Subsidized Annual Pass	x	x	x		x

Fraud Prevention



Most programs prevent fraud by requiring income and identification verification to participate in the program. As previously discussed, some programs require a combination of a low-income fare ID and a fare pass and passengers must be able to provide their ID if asked when using a discounted fare pass.

The topic of fraud came up twice during stakeholder interviews

- Orange County staff asked what safeguards would be in place to prevent abuse of the program.
- DCHC MPO staff stated that it was likely that issues of fraud would be overstated: “I don’t think we’re talking about an amount of money that we would see a lot of fraud. I think people would just...the choice riders value the service and will continue to pay for it. And I don’t think choice riders are going to lament that there might be other people that are more transit dependent that are getting a subsidized ride.”
- A GoTriangle rider’s comments seemed to support the sentiments shared by DCHC MPO staff. “If I’m working, I wouldn’t mind paying. Now I am between jobs and would apply for such a program,” he shared. He stated that he appreciated the convenience of being able to ride for free, but that he understands “the cost to move buses; just to get on the bus.”

Marketing and Communications



Most agencies used the following communication and marketing strategies:

- Information on transit agency websites (including videos and brochures)
- Tabling at transit stations, community events, and sign-up events
- Providing marketing materials to social service agencies/providers

Arlington Transit sent a letter to all SNAP/TANF recipients in the service area to let them know that they were eligible for the program.

Many agencies provided information and application materials in multiple languages.

Website Content

In plain language and languages according to your Limited English Proficiency Policy:

- Program description
 - Full explanation of benefits
 - Clear description of eligibility
 - Renewal period
- Application materials
 - Full list of items that can be used for income and identification verification
- FAQs
- Videos and brochures explaining the program
- Contact information if customer has questions about the program

Website Examples:

- [ORCA Lift](#)
- [RTD LiVE](#)
- [Trimet Honored Citizen Hop Card](#)

Potential Brands for Low-Income Fare Programs

Seven of the 11 programs I reviewed had distinctive brands for their low-income fare programs. These brands include:

- Ann Arbor The Ride **Fare Deal**
- Denver RTD **LiVE**
- King County Metro **ORCA Lift**
- LA County Metro **Low Income Fare is Easy (LIFE)**
- Marin Access **Low Income Fare Assistance program (LIFA)**
- Minneapolis/St. Paul **Transit Assistance Program (TAP)**
- Trimet **Honored Citizen Hop Card**

GoTriangle should consider branding that is cohesive with the existing GoPass brand similar to King County Metro's approach with Orca Lift.

Program Administration

Nationally, regional transit agencies were likely to administer these programs. This means that there can be a mix of local and regional transit benefits as is the case with King County Metro and LA County Metro.

Darling et al. (2021) found three programs that were completely administered by social service agencies. The researchers concluded that smaller agencies tend to favor external administration of low-income fare programs because of the high costs associated with administering these types of programs.

Program Funding

Nationally, low-income fare programs had a variety of funding sources including local sales taxes, federal funding, and American Rescue Plan Act funding (for programs that were recently developed).

- Stakeholders from DCHC MPO, Orange County, Durham County, and the City of Durham supported using transit tax funding to support a low-income fare program.
 - Stakeholders from DCHC MPO, Orange County, and Durham County raised concerns about potential trade-offs between paying for a regional low-income fare program and service quality/expansion
- Stakeholders from the Town of Chapel Hill, Durham County, and the City of Durham shared that employers should cover some of the cost of a low-income fare program.

Funding Sources Used By Agencies

Agency	Funding Source*
Marin Transit LIFA	Local Measure A sales tax
SFMTA Free Muni for Youth	Grant from Google and STP/CMAQ funds for Preventive Maintenance
Valley Transportation Authority Uplift (Santa Clara County)	VTA used \$2.3 million in Transit Performance Initiative (TPI) Incentive funds from MTC to subsidize a portion of each pass sold. Funding for the program was provided through a funding swap that made the federal (Surface Transportation Program) dollars in the TPI program available to VTA for preventive maintenance and freed up other funds to cover the program costs.
WestCAT/AC Transit (Contra Costa County) fare subsidy for low-income high school students	Program's annual cost of \$415,000 is paid for by Contra Costa County's Measure J sales tax revenues.

*Metropolitan Transportation Commission, "Regional Means-Based Transit Fare Pricing Study."

Program Implementation Needs

The following are needed to implement a low-income fare program:

- Low-Income Fare Policy
- Brand Materials
 - Logo
 - Brochures (e.g., [Denver RTD LiVE](#))
 - Postcards to notify potential participants
 - Explanatory videos (e.g., [King County/Sound Transit Subsidized Annual Pass](#), [Minneapolis/St. Paul Metro TAP](#))
- Webpage or website
- Application materials
- Fare Card



Trimet's Honored Citizen
Hop Card

Program Applications

Applications should request the following information:

- Full Name
- Address (if applicable)
- Phone
- Email
- Date of Birth
- Preferred communication method and language
- Race (include "I prefer to self-identify" option)
- Ethnicity
- Gender (include "I prefer to self-identify" option)
- Income (monthly or annual)
- I will verify my identification using...(provide checklist of all items)
- I will verify my income using...(provide checklist of all items)
- Self-certification option if applicable
- Signature to certify accuracy of application, e.g., "I certify that this information is complete and accurate."
- Preferred language
- Preferred communication method

Examples:

- [Ann Arbor The Ride Fare Deal Application](#)
- [Trimet Honored Citizen Hop Card Application](#)



OTHER ISSUES AND ANALYSIS

Riders without a Destination

The most common concern among stakeholders was that a low-income fare program would do little to address the number of bus riders who are thought to ride without an apparent destination.

Stakeholders proposed the following solutions:

- Capping the number of free rides for holders of a low-income fare-pass
- Chapel Hill Transit has a staff member devoted to onboard crisis-response or other issues that arise on buses
- GoDurham is collaborating with the Durham Community Safety Department to explore unarmed response solutions for residents experiencing crisis or other hardships on the bus

Based on secondary research, MCDOT's Ride On Zero & Reduced Fare Study (2021) found that while zero-fare programs may increase the number of riders without a destination, they can also reduce conflict between riders and operators over fares.

The authors of "Implementation and Outcomes of Fare-Free Transit Systems" (2012) found that,

Most managers of fare-free transit systems did not regard disruptive passengers as a significant problem. Many noted that their bus operators prefer to deal with a few more disruptive passengers if it means that they do not have to deal with fare collection and fare disputes.

Document Management

City of Durham/GoDurham stakeholders raised the issue of document management related to means testing for a low-income fare program. They shared that GoDurham asks participants in its paratransit programs to bring documents to their offices and GoDurham does not retain identifying documents to protect sensitive documentation and avoid costs associated with document management.

Should GoTriangle accept documents through their website or by mail, they would need to consider:

- A document retention policy
- Cybersecurity implications of keeping these documents in a database
- A third-party vendor for document management
- This [guide from the Federal Trade Commission](#) is a starting point for thinking about these issues



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APPENDIX A: STAKEHOLDER INTERVIEW SUMMARY

Stakeholders interviewed for this project include staff from:

- City of Durham/GoDurham
- Durham-Chapel Hill-Carrboro Metropolitan Planning Organization
- Durham County
- Orange County
- Town of Chapel Hill
- Wake Transit Fare Workgroup

Stakeholder Priorities

Wake Fare Workgroup	DCHC MPO	Orange County	Town of Chapel Hill	Durham County	City of Durham
Program should not be burdensome for low-income riders	Accomplish goals of 2050 MTP	Environmental Justice	Reduce barriers for people who use transit to travel regionally	Financial impact to Durham County Transit Plan	A preference for a fare-free system over a low-income fare program
Program should not stigmatize low-income riders	Data collection (APC versus Farebox)	Market the program effectively		A low-income fare program could lead to equitable outcomes for transit riders	Equity and dignity of transit riders
Partner with others who provide services to people with low income		Increase transit ridership			Sustainability goals

Stakeholder Concerns

Wake Fare Workgroup	DCHC MPO	Orange County	Town of Chapel Hill	Durham County	City of Durham
Safety/ Security of Bus Operators and Riders	Data collection	What would a low- income fare program look like for residents of rural Orange County?	Is administration of a low- income fare program worth it?	Financial impact to Durham County Transit Plan	Administrative burden of a low- income program given high rider eligibility
How often would pass be renewed?	Means testing is potentially invasive	Is there enough transit services in areas with high EJ populations?	A low- income program might introduce too many barriers for eligible riders.	The City of Durham might also want to use the transit tax to remain fare free	Document management for documents submitted for means testing
How do we make up for lost fare revenue?	Trade-off between a low-income fare program and level of transit service provided		Trade-off between a low-income fare program and level of transit service provided	Administrative complexity of the program	The effect of fares on bus speed and reliability
Riders without a destination				Riders without a destination	

Stakeholder Interview Themes

Theme	Number of Stakeholders
A low-income fare program could or should be supported by the county transit taxes	5
A single card or payment medium that can be used on all regional agencies/improved regional fare coordination would be desirable	4
A regional low-income fare program supports equity goals	4
Riders without a destination should be approached with empathy and care	3
Employers/businesses should cover some of the cost of a low-income fare program	3
The program should avoid stigmatizing low-income riders	2
There should be collaboration with other agencies who provide services to low-income people	2
Elected officials will like/support a regional low-income fare program	2

APPENDIX B: RIDER CONTEXTUAL INTERVIEWS

Rider Engagement Method

I visited the Regional Transit Center (RTC) on August 8, 11, and 16, 2023.

On August 8 and 16, I was at the RTC between 11 and noon. On August 11, I rode three routes (GoDurham 10, GoTriangle 100, GoTriangle 700) from about 2-5 p.m.

I spoke to one rider on the 100 bus, but for the most part, I spoke to riders while they were waiting for the bus.

Visiting the RTC during off-peak hours affected the population of riders I spoke with. Many were older (appeared to be above 50) and several shared that they were experiencing or had experienced financial hardship including being unhoused and being between jobs.

I spoke with four operators over two of three visits. All four operators approached me to find out why I was speaking with riders after seeing me at the RTC over several days.

The questionnaire (see appendix) provided an outline for rider conversations. Not all riders were asked all questions. This was largely because I wanted riders to direct the conversation. All respondents received a brief description of why GoTriangle was thinking about implementing a low-income fare program and that the decision was contingent on returning to fares.

Respondents

- 19 respondents
- 4 male operators
- 15 Riders:
 - 3 female respondents; 12 male respondents
 - 3 White respondents, 12 Black/African American respondents
 - 1 unhoused respondent
 - 2 full-time students
 - 2 riders shared that they were receiving disability benefits

GoTriangle Routes ridden by respondents: 100, 300, 700, DRX, 400, 800

Frequency of riding:

- 7 people stated that they rode GoTriangle buses daily
- 2 people stated that they rode almost daily (3-4 times a week)
- 2 people stated that they rode 2-3 times a week
- 1 person stated that they rode once a week.

GoPass Program

All riders reported being unfamiliar with the GoPass program.

New Riders

Eight riders reported not riding GoTriangle buses prior to 2020.

What is most important for us to think about as we design the program?

- “Do it the easiest way possible”
- “Make the process easy”
- “All programs have good intentions; serve the needy, poor; but then they have constraints; make it close to free”

The Difficulty of Obtaining Benefits

Disability Benefits

One rider shared that she was riding the bus because she applied for a job at the airport and had to do an assessment. She stated that she would only continue to ride the bus if she got the job at the airport. She shared that it was difficult to access disability benefits in North Carolina compared to Maryland, where she lived previously. “They ask for too many documents and even when you have documents, you are still denied” she stated. She described the experience of applying for disability as a “run around.”

Applying for Disability Fare Discount Passes

Two riders discussed their experiences with transit passes intended for people with disabilities.

- One rider stated that he was not worried about returning to fares as although he was semi-retired, he had a source income. He stated that he would apply for a reduced cost fare pass if it were available. He described the process of obtaining his disability ID in Greensboro: “go to the office, take a picture, pay a fee.” The card is good for one year. He had to show his Medicare card and license as ID. He didn’t seem to mind having to go to an office to obtain the disability ID. He spoke at length about how fare free buses have changed ridership. He stated that since “buses are free, more homeless, drug addicts, and people with mental health issues are riding to get out of the heat.” He complained about smoking and the smell of both cigarettes and marijuana on the bus. He spoke about the difference in ridership between local and intercity buses.
- Another rider was aware of GoTriangle’s disability pass, but never applied for it. “I never got around to it,” he stated. He explained that he lived in Chapel Hill and would have had to go to the RTC to apply and therefore he never applied for the pass.

Challenges with Identification

One rider shared why providing identification to apply for the program might be a challenge: “People don’t always have IDs; accept different proof of ID - e.g., email; not just state ID.” He then shared how his backpack was recently stolen.

Proof of Income

When asked how they would prefer to show proof of income to apply for a low-income fare pass, riders shared:

- One rider said he would show evidence related to his direct deposit
- Two riders stated that they would use their pay stub
- One rider shared that he was drawing SSI and it would be easiest to show SSI paperwork
- One rider shared that he wouldn’t have issues providing income verification, but was unsure how she would prefer to do this
- One rider shared that he had no income
- One rider shared that he recently had his backpack stolen and has lost all of his ID documents; “they would need to find out from the IRS” he said when asked about how he would show proof of income

Preferred Methods of Applying for a Low-Income Fare Program

When asked how they would prefer to apply for the low-income fare program:

- Seven riders stated that they would prefer to apply online or with their mobile devices
 - One of these riders stated applying in-person was their second preference
 - One of these riders stated applying via a phone call was their second preference
- Three riders stated that they would be willing to apply via any method
- Two riders said they would prefer to apply in-person
 - One of these riders stated a secondary preference for applying via a phone call

Preferred Location for Applying for a Low-Income Fare Program

- Nine riders said they would prefer to apply for the program at the bus station.
 - One rider specified GoRaleigh Station
 - One rider specified Durham Station
 - Two riders specified the Regional Transit Center
- One rider said they would not apply for the program if they had to do so in person.
- One rider stated that they would prefer to apply for the program at the library.
- One rider shared that he was unhoused and trying to get services through the South Wilmington Street Men's Center. He shared that it might be helpful to get a pass through the center.

Keep the Buses Fare Free

- "I didn't ride before 2020, [buses] should continue to be fare free to allow people to get to their jobs or other public places"
- "Buses should stay free"

Difficulty Affording Bus Fares

- "There are people who can't afford bus fare"
- One rider shared that he wasn't in the area before 2020. He liked the idea of a low-income fare program because "People don't have jobs"
- Another rider described buses as a "Lifesaver before 2020." "If I'm working, I wouldn't mind paying. Now I am between jobs and would apply for such a program." This rider stated that he appreciated the convenience of being able to ride for free, but he understood "the cost to move buses; just to get on the bus."

Bus Operator Comments

Operators for the most part were concerned with:

- Riders without a destination
- Riders behaving poorly on buses including eating, sleeping, littering
- Potential conflict between operators and passengers should fares be reinstated

Operators responded positively to:

- A low-income fare program designed to help people get to work
- The fact that a low-income fare program might help with riders trying to avoid fares should fares be reinstated

Miscellaneous Comments

- “Buses need to be on-time”
- One rider shared that she had difficulty getting on and off the bus because of her “bad knees.” “I have a disability that is hard to see. How would the bus operators know?”

Insights

- Many riders are new to riding GoTriangle, are unfamiliar with the pre-2020 fare structure, and are unfamiliar with the GoPass program. This will pose unique challenges when communicating/marketing about returning to fares and a potential low-income fare program.
- Low-income riders may be applying for multiple benefit programs. Negative experiences with other types of benefits program will affect how they perceive a GoTriangle low-income fare program and determine whether they will even apply for the program.
- Most people shared that they would prefer to apply for a low-income fare program online/on their mobile devices or in-person.
- Most riders would prefer to apply for a low-income pass at the bus station if they had to do so in-person (RTC, GoDurham Station, GoRaleigh Station)
- Bus operators are an important stakeholder group. They feel like they have dealt with the brunt of social issues that have resulted from fare-free buses and they feel unsupported by leadership at all levels.
- Bus operators seem to be sympathetic to a low-income fare program when it is framed to be about working people.

THANK YOU. QUESTIONS?



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**BOARD OF TRUSTEES
OPERATIONS COMMITTEE
MEETING MINUTES**

4600 Emperor Boulevard
Suite 100
Durham, NC 27703

Wednesday, February 7, 2024

1:00 p.m.

Remote | Microsoft Teams

Board members present | Corey Branch, Patrick Hannah, Michael Parker

Board members absent | Vivian Jones [excused], Valerie Jordan

The meeting was called to order at 1:07 p.m. A quorum was present.

I. Adoption of Agenda

II. Approval of Minutes

Action: A motion was made by Branch and seconded by Hannah to adopt the agenda and approve the minutes of January 3, 2024. Upon vote by roll call, the motion was carried unanimously.

III. Vanpool Contract and Subsidy

Audra Foree introduced Vanessa Battle, the vanpool manager. Foree stated that Enterprise Leasing Company had been managing GoTriangle's vanpool program since 2018. She explained that groups of four to 15 people who live and work in close proximity share a van for daily work commutes. Commuters pay Enterprise monthly fees that cover the cost of the leasing of the vehicle, gasoline, insurance and vehicle maintenance. Participants in the vanpool program must live or work within the three county region.

Foree stated that the new contract rate would significantly increase current vanpool rates. Currently there are 20 vanpools in operation, with a subsidy of \$350 per vanpool commuting round trips of under 35 miles daily and \$450 for round trips over 35 daily miles. She said GoTriangle's current contract with Enterprise indicates GoTriangle would like to participate in subsidizing 20-30% of the cost to vanpoolers. The subsidy would need to increase to \$600 per month in order to maintain a 30% subsidy.

Branch asked if other companies offer this service. Foree responded that she has not been able to find one. Branch suggested an early exit clause before three years if Enterprise is not meeting the growth goals of ten new vanpools per year. He suggested a yearly status report.

Foree also said Enterprise is discussing the introduction of a casual vanpool, similar to Uber and Lyft, where a person can just jump onto a vanpool without being subscribed to it.

Parker asked the average vanpool rider charge and if GoTriangle has the authority to regulate it. Foree shared this price matrix:

Enterprise Proposed Vanpool Rates*excluding taxes and fuel*

Monthly Mileage	Kia Sorrento	Nissan Pathfinder	Dodge Durango	Toyota Sienna Honda Odyssey	Ford 12 Passgr Van	Ford 15 Passgr Van
2000	\$1,250	\$1,320	\$1,450	\$1,400	\$1,550	\$1,600
2250	\$1,300	\$1,370	\$1,500	\$1,455	\$1,600	\$1,650
2500	\$1,350	\$1,420	\$1,550	\$1,555	\$1,650	\$1,700
2750	\$1,400	\$1,470	\$1,600	\$1,655	\$1,700	\$1,750
3000	\$1,450	\$1,520	\$1,650	\$1,755	\$1,750	\$1,800
3250	\$1,500	\$1,570	\$1,700	\$1,855	\$1,800	\$1,850
3500	\$1,550	\$1,620	\$1,750	\$1,955	\$1,850	\$1,900
3750	\$1,600	\$1,670	\$1,800	\$2,055	\$1,900	\$1,950
4000	\$1,650	\$1,720	\$1,850	\$2,155	\$1,950	\$2,000

Parker clarified that vanpoolers would split the balance of the monthly rate after GoTriangle's \$600 subsidy is paid. Foree stated that some individual also receive a subsidy from their employers, reducing what they pay. She said the federal subsidy is \$315 per month per vanpooler. She stated that the contract now includes language that the GoTriangle subsidy is applied after employer subsidies.

Foree added that the vehicles are branded with GoTriangle's logo and the mileage gets reported to the National Transit Database from which GoTriangle receives grant funds.

Parker asked about Enterprise's commitment to electrify their fleet. Foree stated that has not been part of previous discussions with Enterprise.

Action: A motion was made by Branch and seconded by Hannah to recommend the board award a contract to Enterprise Leasing Company, LLC from February 2024 through FY27 for a maximum of \$1,800,000, authorize the President/CEO to execute a contract consistent with those terms and increase the monthly subsidy not to exceed 30% of the cost to commuters, for a maximum of \$600 per vanpool. Upon vote by roll call, the motion was carried unanimously.

IV. Adjournment

Action: Chair Parker adjourned the meeting at 1:37 p.m.

Prepared by:

Michelle C. Dawson, CMC
Clerk to the Board of Trustees



**BOARD OF TRUSTEES
PLANNING COMMITTEE
MEETING MINUTES**

4600 Emperor Boulevard
Suite 100
Durham, NC 27703

Wednesday, February 7, 2024

3:00 p.m.

Remote | Microsoft Teams

Board members present | Mary-Ann Baldwin, Sally Greene, Brenda Howerton, Jennifer Robinson [arr. 3:12 p.m.]

Board members absent | Mike Fox, Leo Williams

The meeting was called to order at 3:02 p.m. A quorum was present.

I. Election of Committee Chair

Action: A motion was made by Greene and seconded by Baldwin to elect Howerton as committee chair. Upon vote by roll call, the motion was carried unanimously.

II. Election of Committee Vice Chair

Action: A motion was made by Baldwin and seconded by Greene to elect Leo Williams as committee vice chair. Upon vote by roll call, the motion was carried unanimously.

III. Adoption of Agenda

Action: A motion was made by Greene and seconded by Baldwin to adopt the agenda. Upon vote by roll call, the motion was carried unanimously.

IV. Wake Bus Stop Property Acquisition

Gary Tober stated that GoTriangle has been working for Durham on bus stop property acquisitions and now is doing the same for Wake Transit. He explained that a minimum of three attempts with each property owner are made by GoTriangle's agent. If the property owner is unwilling to convey the interest needed, it is considered an impasse and alternative locations are sought. Eminent domain is not being used. Staff is requesting authorization to conduct early outreach and acquire the property interest needed for 74 bus stops in Wake County for bus stop improvements.

Robinson arrived.

Tober further explained that these are slivers of property, typically between 50 and 500 square feet of right of way. No businesses or residences are displaced and it is not known at this how many of the 74 sites will require right of way.

Baldwin asked why some property owners would not want to participate. Tober responded usually it involves money and because it is slivers of right of way the value is usually only a few hundred dollars. In some situations property owners do not want a shelter in front of their property.

Action: A motion was made by Baldwin and seconded by Greene to recommend the board authorize staff to conduct early outreach and acquire the property interest needed for GoTriangle bus stop improvements in Wake County at the existing stop locations attached. Upon vote by roll call, the motion was carried unanimously.

V. Durham Bus Stop Property Acquisition

Gary Tober then requested authorization for property acquisition activities in Durham County for 56 bus stops.

Action: A motion was made by Baldwin and seconded by Greene to recommend the board authorize staff to conduct early outreach and acquire the property interest needed for GoTriangle bus stop improvements in Durham County, on behalf of the City of Durham, at the existing stop locations attached. Upon vote by roll call, the motion was carried unanimously.

VI. GoTriangle Rapid Bus/BRT Study

Paul Black's presentation is attached and hereby made a part of these minutes. He reminded committee members that the board previously approved this study to evaluate improving regional routes and ensure local systems and local BRTs are well connected. This study will provide ideas and options to accomplish this goal in a way that is complementary to other efforts. It will identify corridors for service along with cost estimates and priorities.

Baldwin stated a concern with duplication of effort related to the FAST study. She requested that staff have a conversation with NCDOT before moving forward. Lattuca said the FAST study is more infrastructure versus this study that will look at service. He agreed to bring information back to the board after a discussion with NCDOT.

VII. Adjournment

Action: Chair adjourned the meeting at 3:38 p.m.

Prepared by:

Michelle C. Dawson, CMC
Clerk to the Board of Trustees

AGENDA ACTION ITEM

Submitted by: Bong Vang, Senior Engineer

Meeting date: February 28, 2024

SUBJECT: Contract for Durham Bus Stop Improvements

Strategic Objective or Initiative Supported

2.4 ensure an attractive and accessible transit environment

Staff Recommendation

Award a contract to Whitley contracting for construction, installation of amenities, and other improvements at 11 Durham bus stop locations, with a maximum dollar amount of \$600,701.20 and authorize the President/CEO to execute the contract consistent with those terms. Staff also requests authorization for an additional 10%, or \$60,070.12, for project contingency related to unforeseen conditions, for a total contract budget of \$660,771.32.

Item Summary

The adopted Durham County transit work plan includes funding for GoTriangle to contract for delivery of bus stop improvements for GoDurham and GoTriangle throughout Durham County. The construction drawings for this group of 11 bus stops were approved by the City and NCDOT as applicable. These improvements are within existing public right-of-way and acquired ROW.

The procurement solicitation phase culminated with after two Invitations-for-Bids (IFB). The first bid opening in December 2023 resulted in receipt of only one bid. Procurement policy requires at least three bids in response to an initial Invitation-for-Bids (IFB), otherwise resolicitation is required. A second IFB was released, including an expanded invitation to general contractors, DBE and M/WBE contractors for bids. Two bids were received on February 1, 2024.

<i>Vendor</i>	<i>Prime Home Office Location</i>	<i>Prime DBE/ MWBE Status</i>	<i>Subcontractor DBE/ MWBE Firms</i>
Whitley Contracting	Smithfield, NC	WBE – 80.99%	David Hinton Construction MBE – 19.01%
Cinderella Partners	Indian Trail, NC	n/a	Franco Masonry Concrete MBE – 19.2% Landco Landscaping Services WBE – 2.7% LMJ Pavement Markings WBE – 5.5%

Evaluation of Whitley Contracting's bid confirmed it to be responsible and responsive to the terms and conditions for IFB No. 23-068. Staff also performed a price analysis. Whitley Contracting's bid is 7.6% lower than the engineer's estimate of \$650,000.

Financial Impact

The total adopted funding for Durham Bus Stop Improvements in the Durham Transit Work Program is \$15,029,000. Of this total, approximately \$8 million is currently allocated for construction. To date, \$3,217,616.35 has been committed to construction contracts. This \$660,771.32 can be accommodated within the existing budget.

Attachments

- None





January 2024

CEO's Monthly Executed Contracts

The CEO shall have the power and authority without Board approval but within budgetary and other limitations established by the Authority, to enter into and execute contracts for and on behalf of the Authority for construction, alterations, supplies, equipment, repairs, maintenance, and services; and for the purchase, sale, or lease of any property. The CEO shall report monthly to the Board the actions taken pursuant to this authority.

GoTriangle Purchasing Threshold Matrix/Approval Levels

Construction/Repair Projects					Professional And Non-Professional Services (Incl. Oper. Leases & IT)				Purchase and Lease/Purchase Apparatus, Supplies, Materials and Equipment			
<u>Cost Threshold</u>	<\$10,000	\$10,000 - <\$50,000	\$50,000 - <\$500,000	\$500,000 and above	<\$10,000	\$10,000 - <\$50,000	\$50,000 - <\$250,000	\$250,000 and above	<\$10,000	\$10,000 - <\$90,000	\$90,000 - <\$250,000	\$250,000 and above
<u>BID AND SOLICITATION PROVISIONS:</u>												
<u>Bid/Proposal Type</u>	N/A	Informal Bid	Formal Bid	Formal Bid	N/A	Informal Quotes/RFP	Formal RFP	Formal RFP	N/A	Informal Bid	Formal Bid	Formal Bid
<u>Number of Bids Required</u>	One or more	Attempt To Get 3 or more bids	Attempt To Get 3 or more bids	3 required on 1st ad; if 2nd ad-no specific requirement	One or more	Attempt To Get 3 or more quotes	Attempt To Get 3. or more proposals	Attempt To Get 3. or more proposals	One or more	Attempt To Get 3 or more bids	Attempt To Get 3 or more bids	Attempt To Get 3 or more bids
<u>Advertisement on Website</u>	No	\$30K and over	\$30K and over	Required 7-full days prior to bid opening	No *** (see NOTES below)	\$30K and over, 14- days prior to due date	14-days prior to due date	14-days prior to due date	No	Yes	Required 7-full days prior to bid opening	Required 7-full days prior to bid opening
<u>CONTRACT HANDLING AND APPROVAL PROVISIONS:</u>												
<u>Contract and Routing Required?</u>	>\$3,500 PO Required	Yes	Yes	Yes	>\$3,500 PO Required	Yes	Yes	Yes	>\$3,500 PO Required	Usually PO	Usually PO	Usually PO
<u>Approval By</u>	Dept / Manager	Dept / Director CEO	Dept / Director CEO	Board	Dept / Manager	Dept / Director CEO	Dept / Director CEO	Board	Dept / Manager	Dept / Director CEO	Dept / Director CEO	Board
<u>Executed By</u>	Dept / Manager	CEO	CEO	CEO	Dept / Manager	CEO	CEO	CEO	Dept / Manager	CEO	CEO	CEO

FUNDING SOURCES

All Federal Funding Procurements Shall Go Through the Procurement Department Regardless Of Dollar Amount

NOTES:

MWBE/DBE GOOD FAITH EFFORTS ARE REQUIRED FOR ALL OF THE ABOVE.

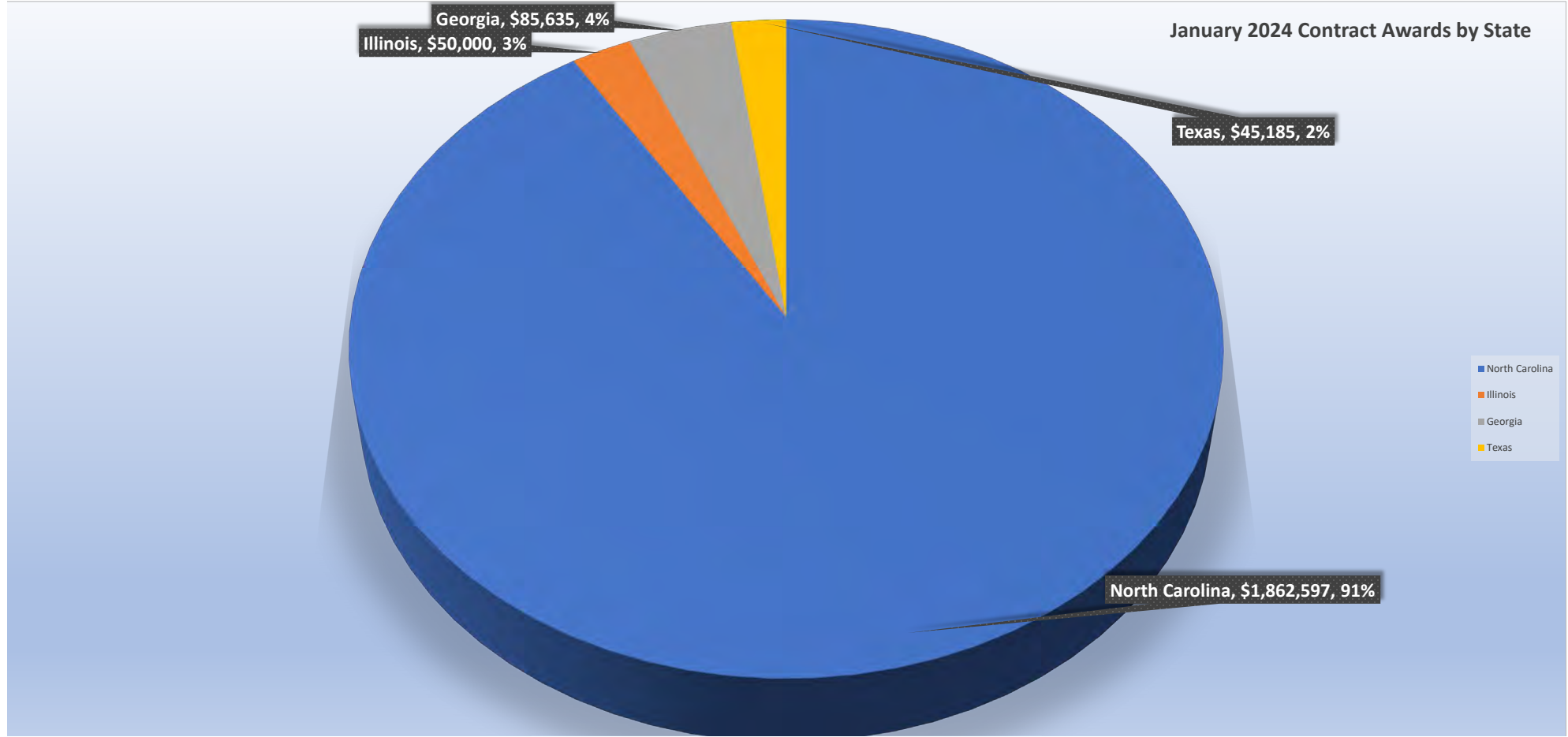
*** ALL PROFESSIONAL DESIGN SERVICES (architectural, engineering, design, surveying, & construction management at risk) ARE REQUIRED TO BE ANNOUNCED (ADVERTISED AT ANY DOLLAR LEVEL) – Non- Professional Services do not need to be advertised at this dollar amount. (However, for projects where the professional service fee is less than \$50,000, GoTriangle can exempt itself in writing with approval by the CEO for locally funded projects. Submit requests to Procurement Department.)

<i>Gasoline, Diesel Fuel, Alcohol Fuel Motor Oil or Fuel Oil</i>	No \$ Limits	Attempt To Get 3 or more quotes	Approval CFO
<i>GS 143-129 Gas, Fuel and Oil- Purchases of Gasoline, Diesel Fuel, Alcohol Fuel, Motor Oil, Fuel Oil or Natural Gas are not subject to the formal bidding requirements. These purchases are subject to the informal procedures of GS 143-131. Informal threshold is \$30,000-\$90,000</i>			

January 2024-Monthly Executed Contracts Report (<250K)



Contract #	Contractor (or subject if no contract listed)	Location	Contract Amount	Subject	DBE/MWBE/HUB Business FTA DBE Goal 13.57%	COMMENTS	CEO Executed Date
23-030	Transpro	4721 First Street NW, Hickory, NC 28601	\$284,220	Strategic Planning Services	N/A	Professional Services	1/2/2024
1399	Luminator Technology Group, Inc	28818 Network Place Chicago, IL 60673	\$50,000	BPO	N/A	Parts	1/8/2024
23-065	Whitley Contracting, Inc	5735 Brogden Rd Smithfield, NC 27577	\$481,627	Bus Stop Improvements	DBE/WBE/HUB	Construction Services	1/16/2024
23-007	Browe Construction	451 Oak Tree Drive Selma, NC 27576	\$834,388	Bus Stop Improvements	DBE/WBE/HUB	Construction Services	1/17/2024
1402	Creative Business Interiors	8720 Fleet Service Drive Raleigh, NC 27617	\$31,263	Repair	N/A	Professional Services	1/19/2024
21-046	NCSU	Campus Box 7214 Raleigh, NC 27695-7214	\$99,724	Triangle Regional Modeling	N/A	Professional Services	1/24/2024
24-004	Tracy Kimbrell	2009 Fairview Rd. PO Box 6431 Raleigh, NC 27628	\$66,000	Lobbying Services	N/A	Professional Services	1/24/2024
1417	e-Builder	PO Box 935949 Atlanta, GA 31193-5949	\$85,635	Annual Renewal	N/A	Software Agreement	1/24/2024
1418	SHI International	PO Box 952121 Dallas, TX 75395-2121	\$45,185	Annual Renewal	N/A	Software Agreement	1/24/2024
1420	Central Pines Regional Council	4307 Emperor Blvd., Suite 110 Durham, NC 27703	\$49,000	Planning and GIS Services	N/A	Professional Services	1/28/2024
1424	Done Right The First Time, LLC	2110 Concord Street Durham, NC 27707	\$16,375	Tactical Transit Amenities	N/A	Construction Services	1/30/2024
Total			\$2,043,417				



All Executed Contracts

January 2024

Contractor	Executed Date	Contract No	Amount	Department
NCSU Task Order 5-Triangle Regional Modeling (TRM) Service with North Carolina State University Department CapDev	1/24/2024	21-046	\$99,724.00	CapDev
Done Right The First Time, LLC Tactical Transit Amenities Department CapDev	1/30/2024	1424	\$16,375.00	CapDev
Central Pines Regional Council (DCHC-MPO-DUR) FY24 Planning and GIS Services Department CapDev	1/28/2024	1420	\$49,000.00	CapDev
East Coast Service Group Logistics Amenity Installations Department CapDev	1/23/2024	1416	\$6,750.00	CapDev
RKA/DRMP Assignment Letters Department CapDev	1/24/2024	21-076	\$0.00	CapDev
Whitley Contracting Bus Stop Improvements Construction Group H Department CapDev	1/16/2024	23-065	\$481,627.00	CapDev
Browe Construction Bus Stop Improvements Construction Group G Department CapDev	1/17/2024	23-007	\$834,388.00	CapDev

Contractor		Executed Date	Contract No	Amount	Department
e-Builder		1/24/2024	1417	\$85,634.76	CapDev
e-Builder Renewal					
Department	CapDev				
				\$1,573,498.76	
Creative Business Interiors		1/31/2024	1426	\$5,364.17	Facilities
Carpet Replacement					
Department	Facilities				
Creative Business Interiors		1/19/2024	1402	\$31,262.75	Facilities
Carpet Purchase/Installation for Second Floor Legal Department					
Department	Facilities				
				\$36,626.92	
COMTO		1/22/2024	1414	\$3,750.00	Finance
2024 COMTO Membership Renewal					
Department	Finance				
				\$3,750.00	
Citrix		1/11/2024	1403	\$6,624.71	IT
Virtual Apps and Desktops Service					
Department	IT				
SHI International		1/24/2024	1418	\$45,184.85	IT
D365					
Department	IT				
				\$51,809.56	

Contractor	Executed Date	Contract No	Amount	Department
Wake County and CAMPO General Operating Agreement for Bus Operations Department Legal	1/9/2024	23-038	\$0.00	Legal
CAMPO Amendment 1 to FY23 Special Capital Funding Agreement for Bus Infrastructure Department Legal	1/2/2024	22-062	\$0.00	Legal
Tracy Kimbrell Lobbying Services Department Legal	1/24/2024	24-004	\$66,000.00	Legal
Town of Zebulon and CAMPO General Operating Agreement for Bus Operations Department Legal	1/18/2024	23-037	\$0.00	Legal
			\$66,000.00	
Petroleum Traders Corporation Fuel Department Maintenance	1/16/2024	1405	\$18,872.78	Maintenance
Luminator Technology Group, Inc BPO-Parts Department Maintenance	1/8/2024	1399	\$50,000.00	Maintenance
Petroleum Traders Corporation Fuel Department Maintenance	1/3/2024	1396	\$20,818.07	Maintenance

Contractor		Executed Date	Contract No	Amount	Department
Petroleum Traders Corporation		1/11/2024	1400	\$20,071.08	Maintenance
Fuel					
Department	Maintenance				
Petroleum Traders Corporation		1/22/2024	1406	\$19,921.19	Maintenance
Fuel					
Department	Maintenance				
Petroleum Traders Corporation		1/24/2024	1409	\$18,658.37	Maintenance
Fuel					
Department	Maintenance				
Petroleum Traders Corporation		1/30/2024	1410	\$19,206.72	Maintenance
Fuel					
Department	Maintenance				
Reliable Collision Painting		1/17/2024	1407	\$5,526.91	Maintenance
Bus Repair					
Department	Maintenance				
Petroleum Traders Corporation		1/9/2024	1398	\$19,041.71	Maintenance
Fuel					
Department	Maintenance				
				\$192,116.83	
NCDOT		1/11/2024	24-002	\$0.00	Real Estate
Temporary Right of Way					
Department	Real Estate				
NCDOT		1/8/2024	24-001	\$0.00	Real Estate
Easement Agreement					
Department	Real Estate				

Contractor		Executed Date	Contract No	Amount	Department
				\$0.00	
Transpro		1/2/2024	23-030	\$284,220.00	TOD
Strategic Planning Services					
Department	TOD				
				\$284,220.00	
				\$2,208,022.07	
29					



Connecting all points of the Triangle

HUMAN RESOURCES BOARD REPORT – FEBRUARY 2024

NEW HIRES

Samuel Tatum- Transit Operator
Craig Sample – Transit Operator
Shalon Johson- Transit Operator
V'Antrae Lewis- Transit Operator
Carmen Taylor– Transit Operator
Christopher Kanas – Transit Operator
Daquan Hart- Transit Operator
Jeffrey Allen- Paratransit Operator
Shamal Harley- Maintenance Tech II

SERVICE AWARDS

Donald Maxwell Mechanic III 15 years

PROMOTIONS

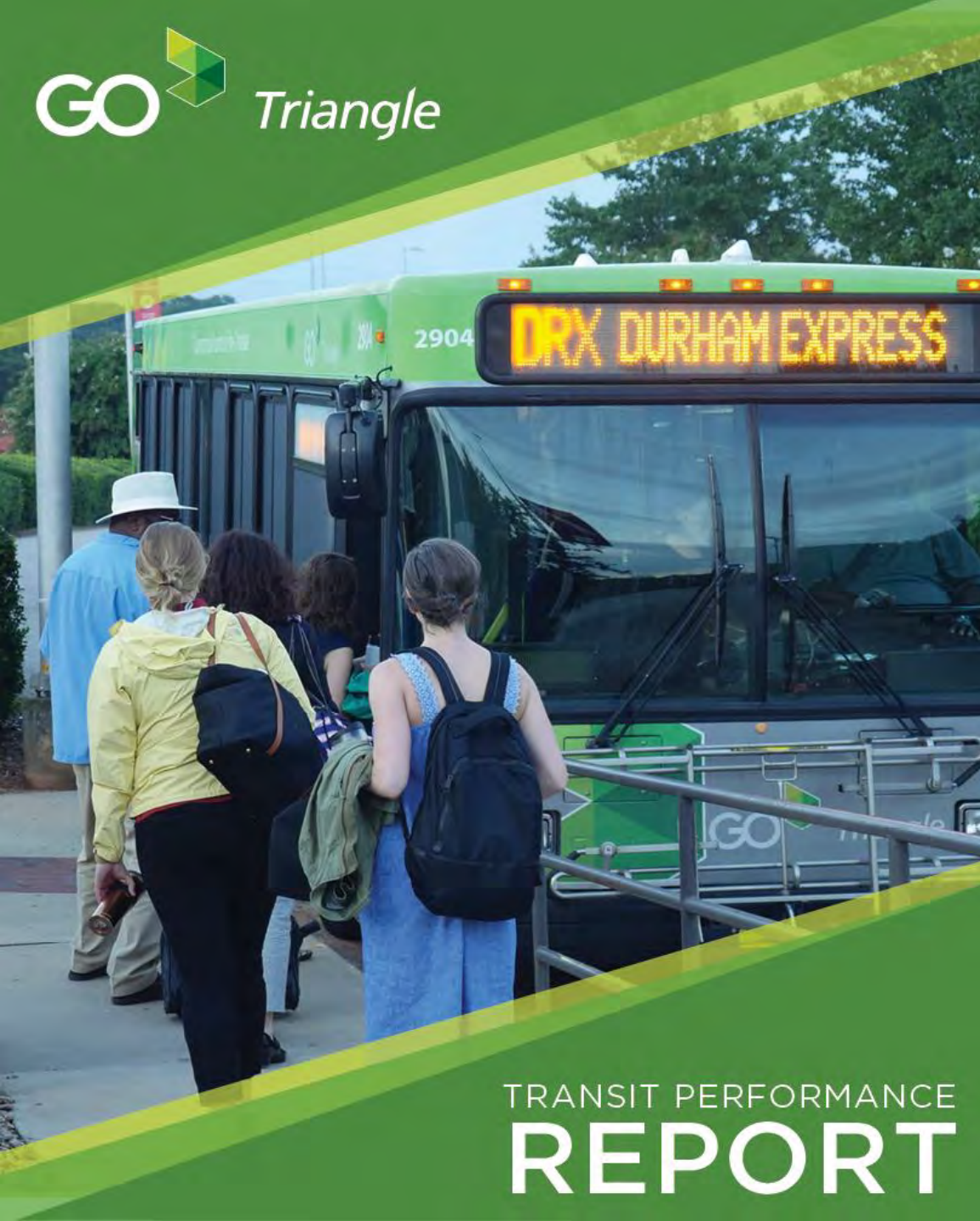
Erica Burton
Customer Information Quality Assurance Coordinator
Effective: 02/12/2024

RECRUITING

Transit Operator – Part Time & Full Time
Human Resources Generalist
Maintenance Supervisor
Transit Service Supervisor
Customer Information Specialist – Part Time
Contracts & Grants Coordinator
Senior Accountant
Transit Ambassador & Outreach Specialist
Compliance Program Manager



January
2024



TRANSIT PERFORMANCE
REPORT



Fixed Route

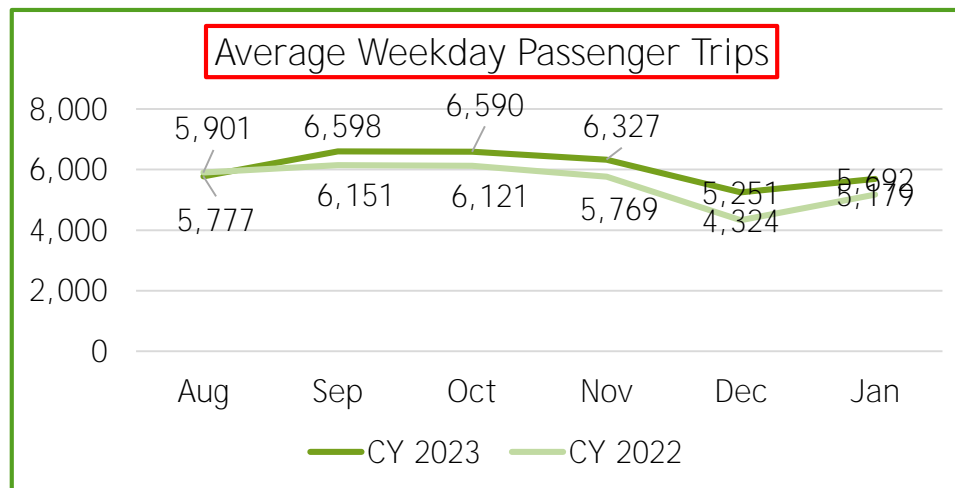
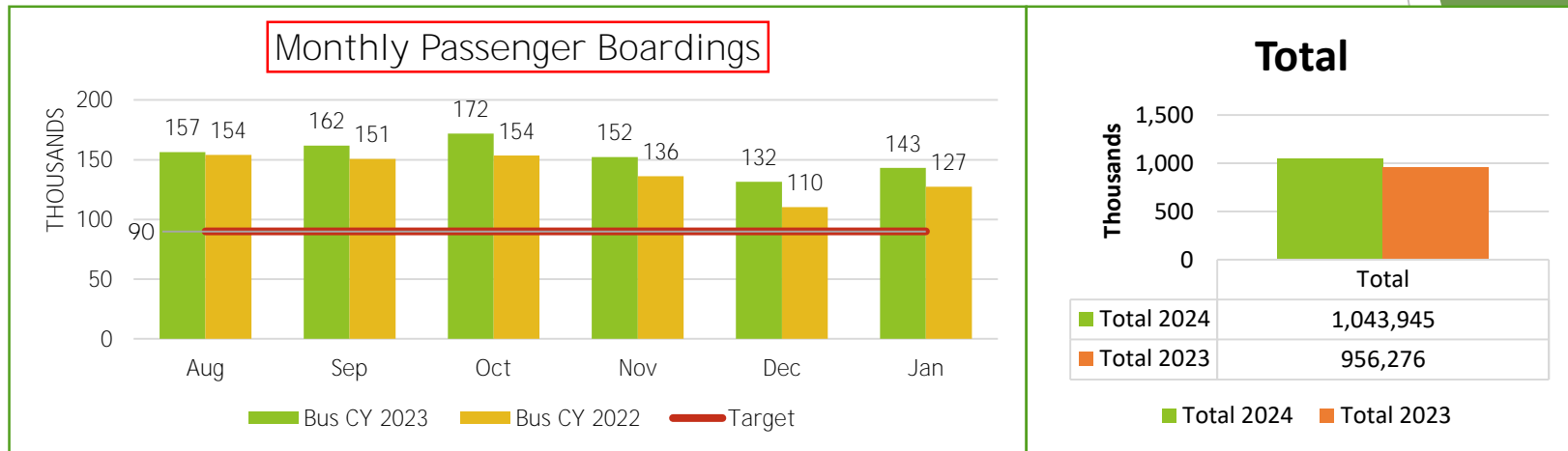
Consists of vehicles operating
along a defined route on a
consistent schedule

Fixed Route Year-to-Year Summary

	YTD 2024	YTD 2023	Jan 2024	Jan 2023
Passenger Boardings	1,043,945	956,276	143,204	127,343
Passengers/Revenue Hour	16.2	16.4	15.2	16.3
On-Time Performance	79.7%	84.1%	84.3%	85.9%
Total Mechanical Failures	167	107	23	15
Mean Distance Between Failures	78,065	115,320	101,414	74,299
Bus Total Miles	1,561,305	1,235,385	202,827	148,598
Collisions per 100,000 Revenue Miles	0.74	0.56	1.68	0.00
Verified Complaints per 100,000 Passengers	2.4	2.9	0.0	3.9

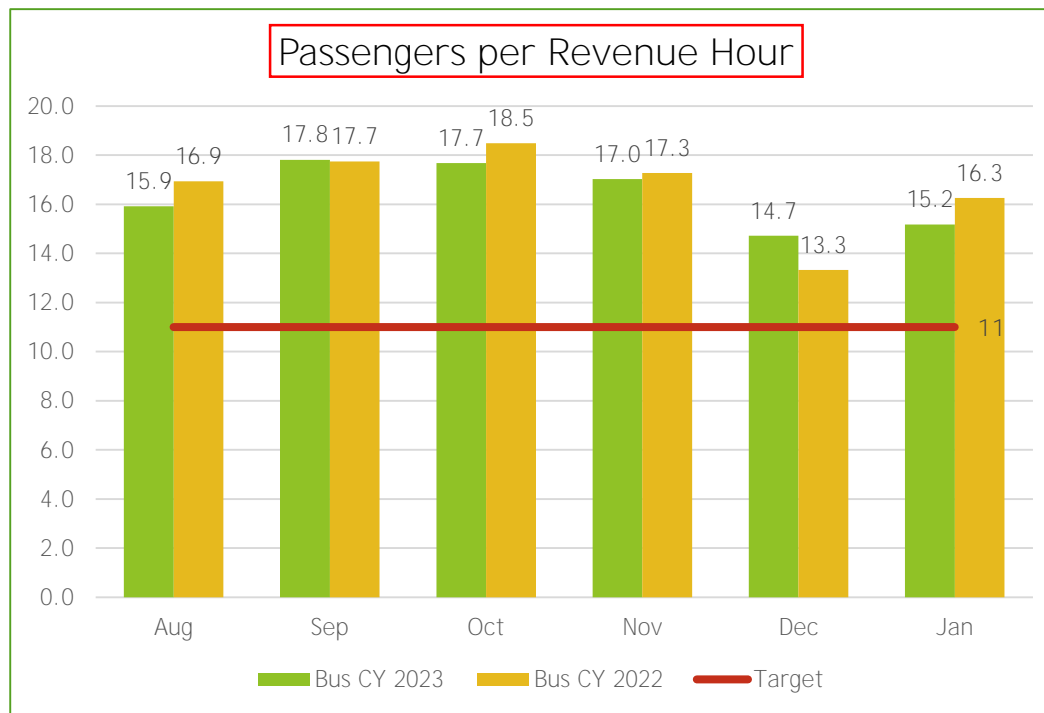
Passenger Boardings

- ▶ Defined as the number of times passengers board public transportation vehicles
- ▶ All years shown are the fiscal year of the latest month



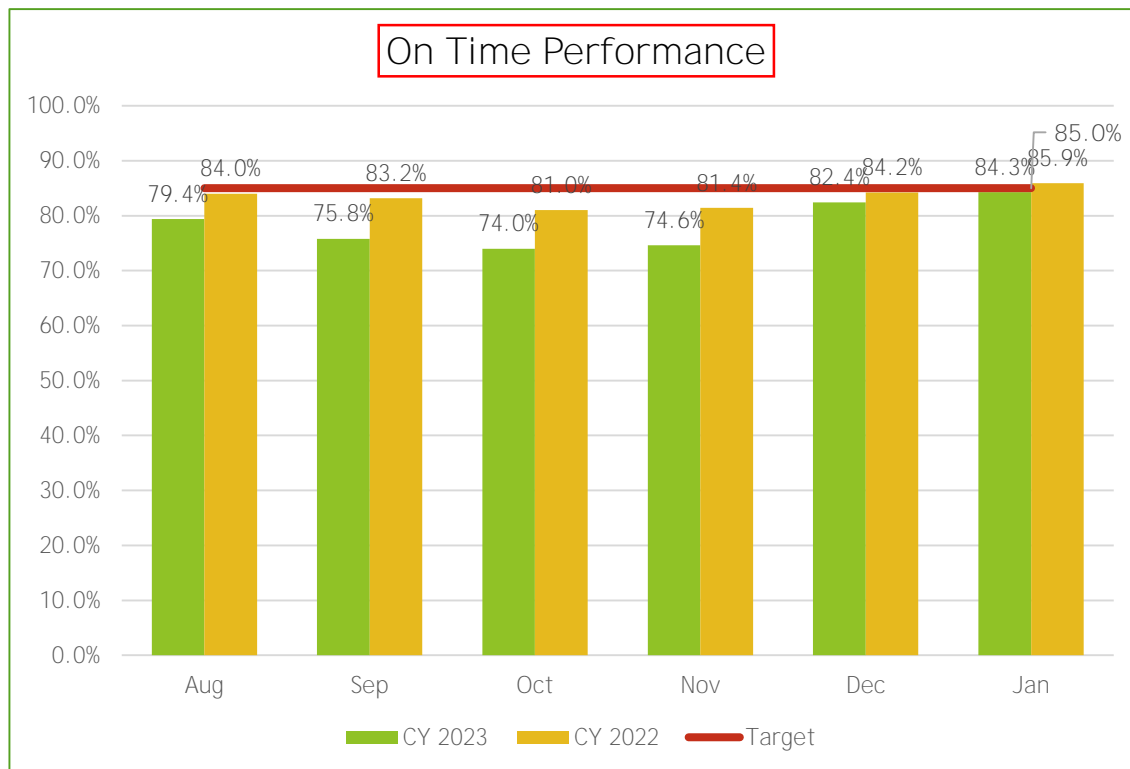
Passengers per Revenue Hour

Measures total fixed route bus ridership, divided by total fixed route bus revenue service hours



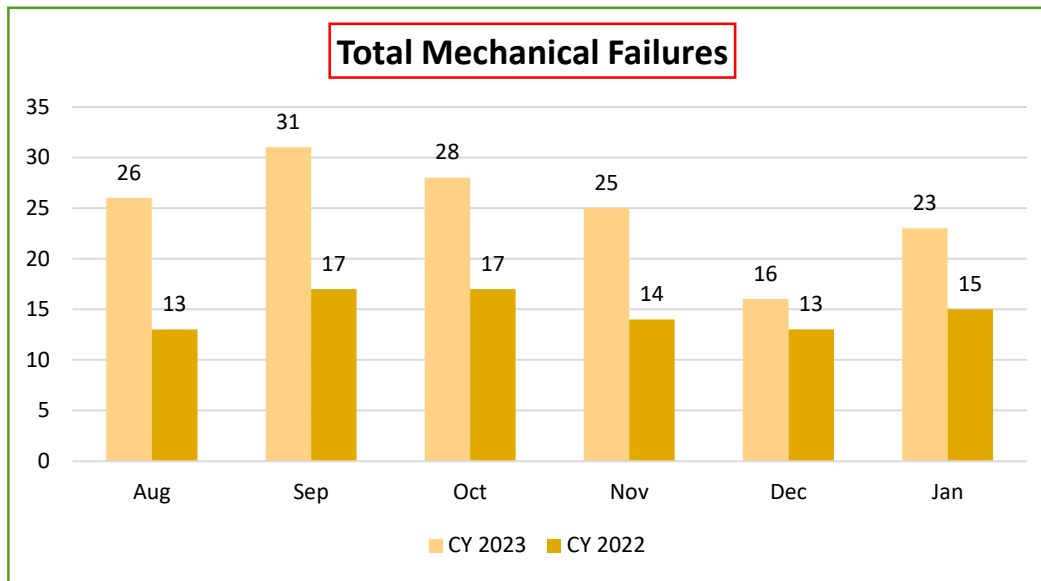
On-Time Performance

Measures on-time performance of fixed route bus service. On-time is defined as bus arrival at the stop between one minute early and five minutes late.



Mechanical Failures

Measures the total number of mechanical failures, major and other, of the bus fleet.

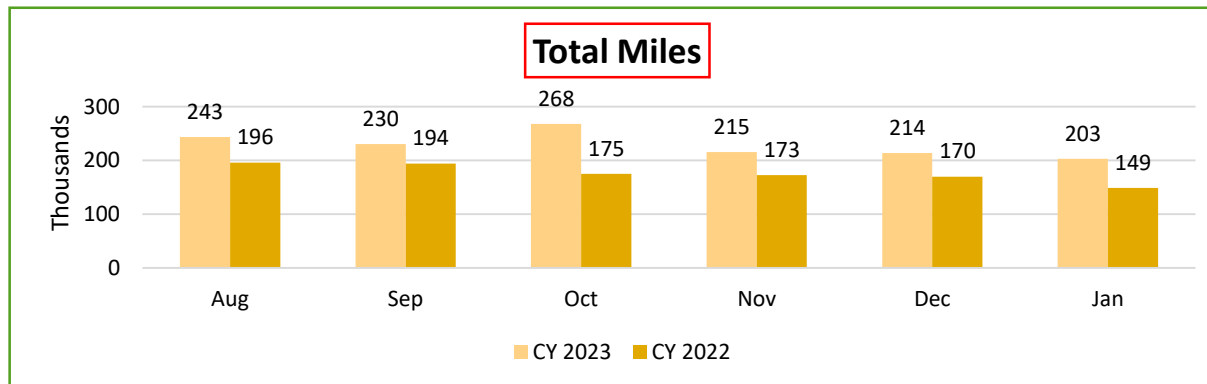
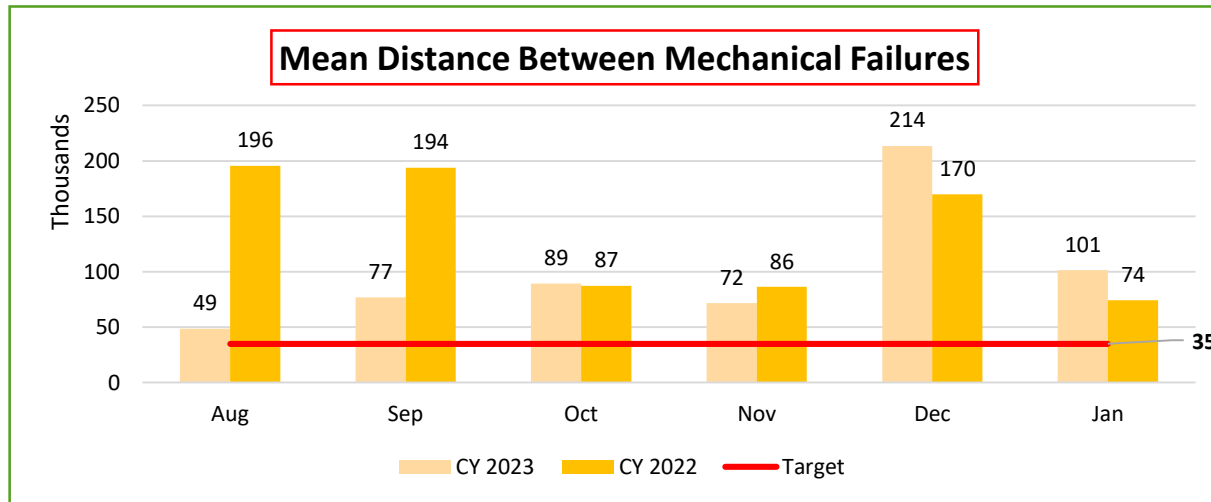


CY 2023						
	Aug	Sep	Oct	Nov	Dec	Jan
Major	5	3	3	3	1	2
Other	21	28	25	22	15	21
Total	26	31	28	25	16	23

CY 2022						
	Aug	Sep	Oct	Nov	Dec	Jan
Major	1	1	1	2	1	2
Other	12	16	16	12	12	13
Total	13	17	17	14	13	15

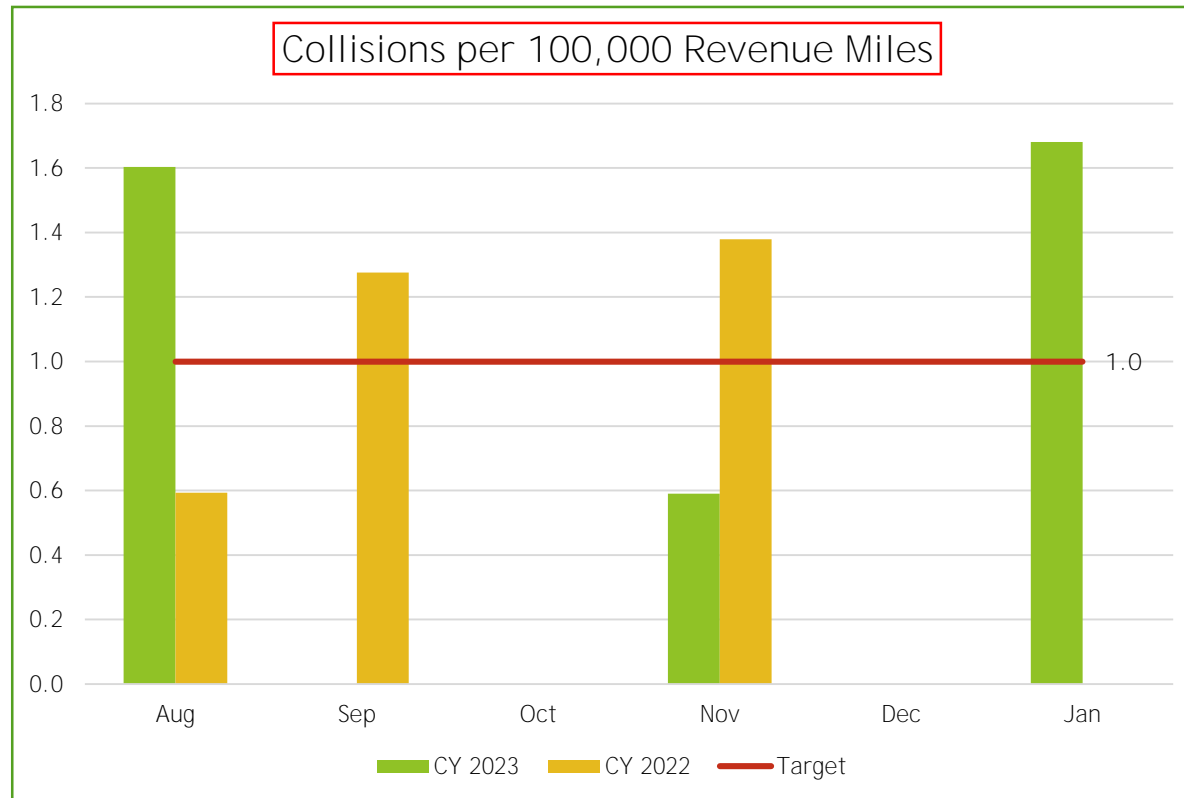
Mean Distance Between Failures

Measures the miles between major mechanical failures on the fixed route fleet (Note: Higher Bus Mean Distance Between Failures is better.)



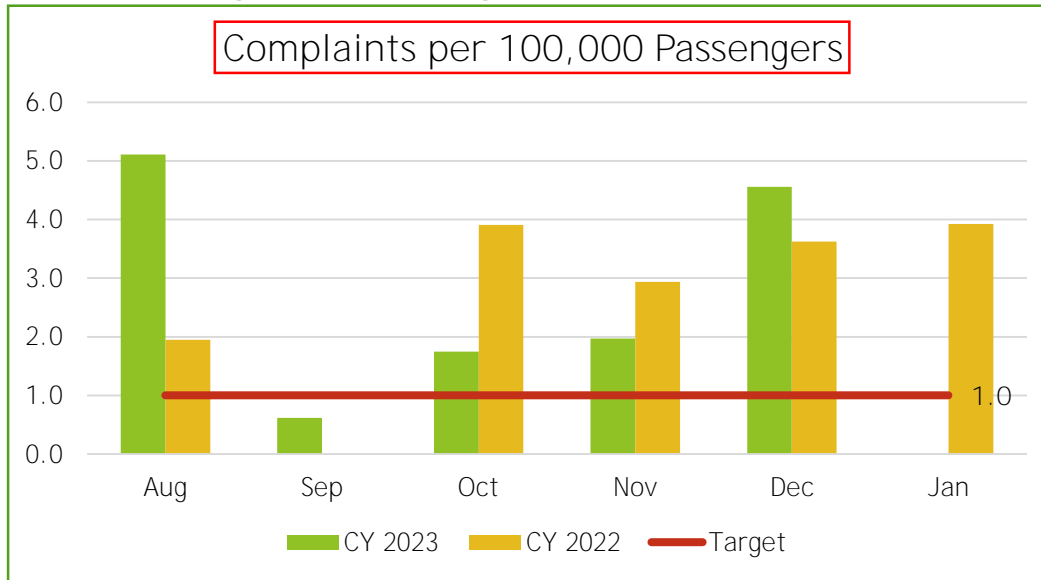
Collisions per 100,000 Revenue Miles

Measures the number of preventable collisions involving bus service per 100,000 miles.



Customer Satisfaction

Measures verified customer complaints about bus service per 100,000 bus passenger boardings.





Paratransit

ADA service where passengers request trips and vehicles respond to the request.

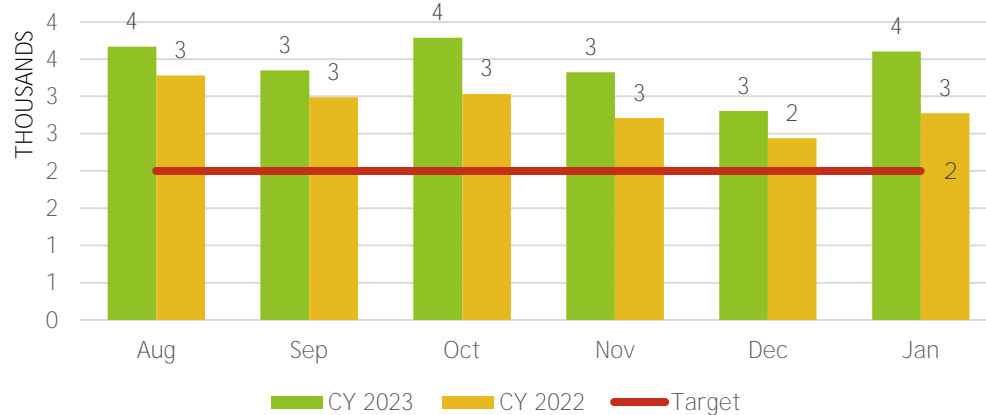
Paratransit Year-to-Year Summary

	Jan 2024	Jan 2023	YTD 2024	YTD 2023
Passenger Boardings	3,603	2,773	23,655	19,925
Passengers/Revenue Hour	1.9	1.8	1.8	1.8
On-Time Performance	86.3%	92.0%	89.1%	89.4%
Total Mechanical Failures	1	1	5	3
Mean Distance Between Failures	No failures	No failures	No failures	No failures
ACCESS Total Miles	58,823	70,810	391,215	414,138
Collisions per 10,000 Revenue Miles	0.0	0.0	0.2	0.0
Verified Complaints per 1000 Passengers	0.0	0.0	0.2	0.14

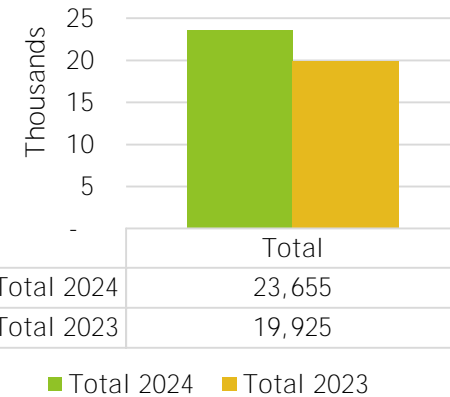
Passenger Boardings

Defined as the number of times passengers board public transportation vehicles

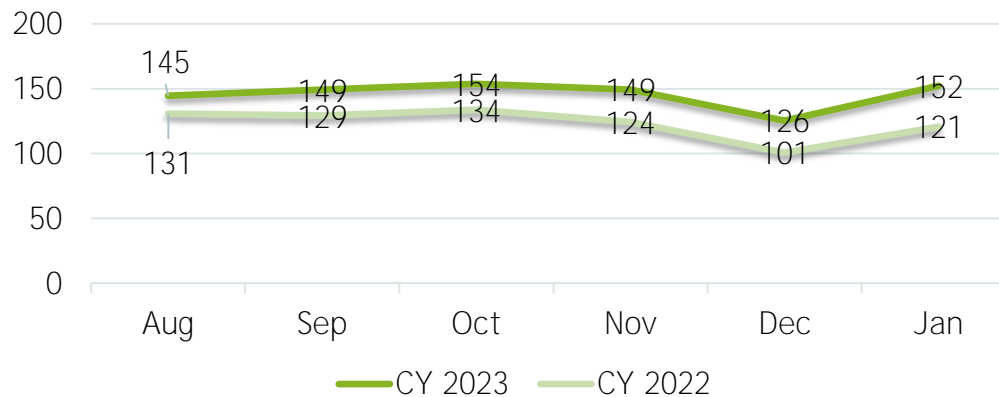
Monthly Passenger Boardings



Total

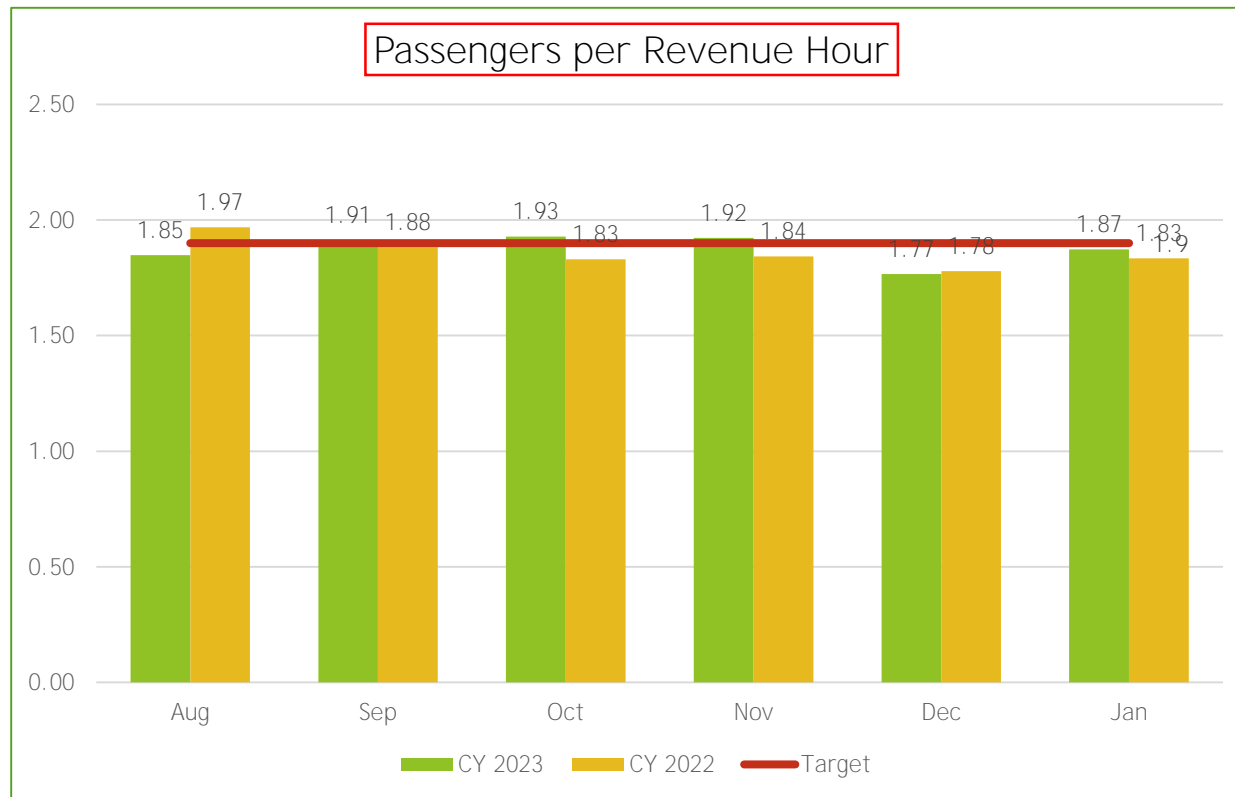


Average Weekday Passenger Trips



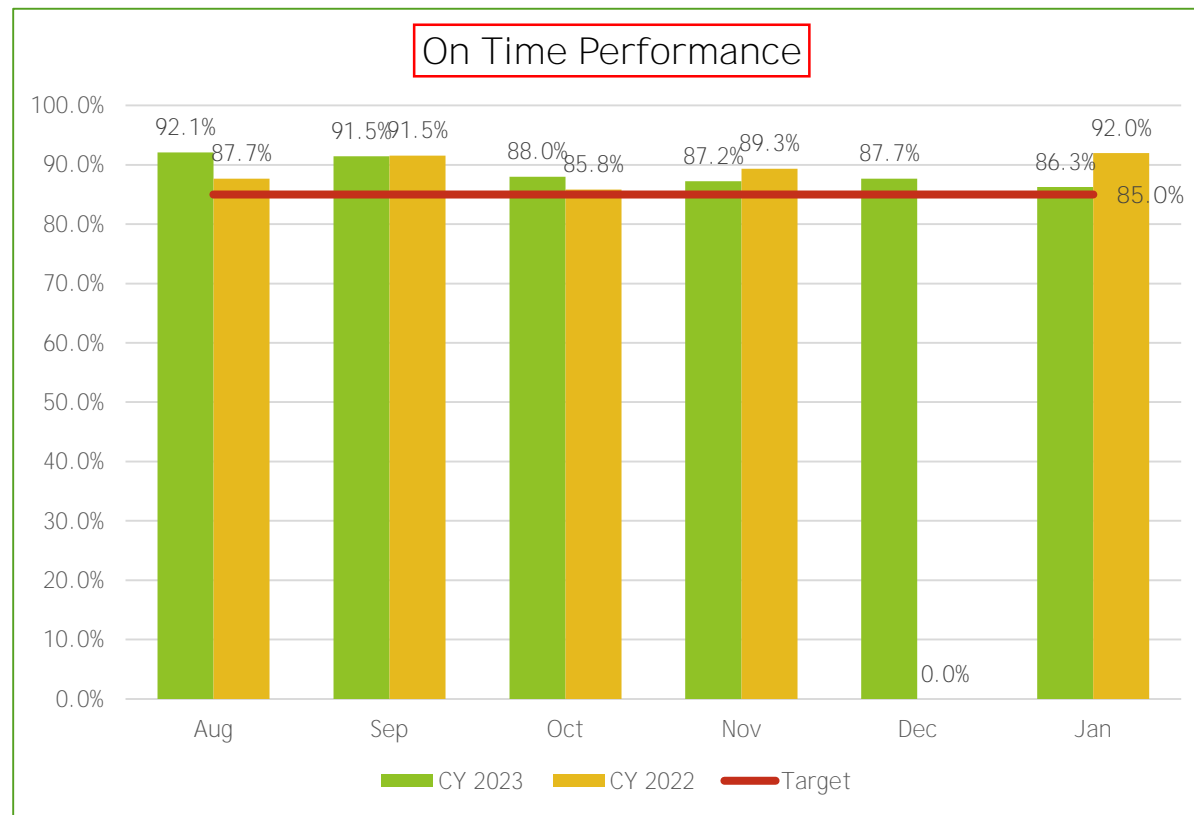
Passengers per Revenue Hour

Measures total ridership, divided by total service hours.



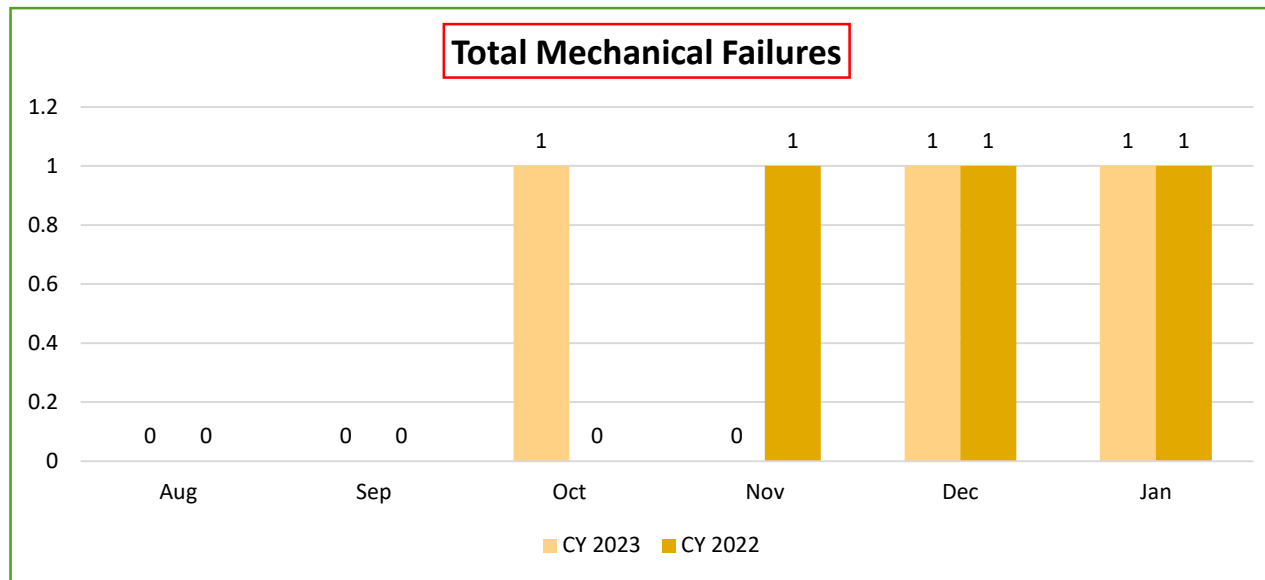
On-Time Performance

Define as being picked up between 15 minutes before and 15 minutes after requested pickup time.



Mechanical Failures

Measures the total number of mechanical failures, major and other, of the paratransit fleet.

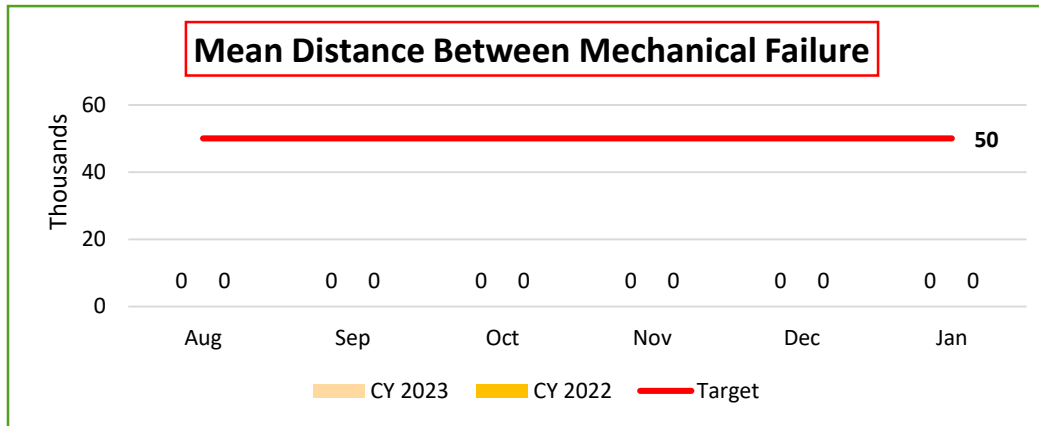


CY 2023						
	Aug	Sep	Oct	Nov	Dec	Jan
Major	0	0	0	0	0	0
Other	0	0	1	0	1	1
Total	0	0	1	0	1	1

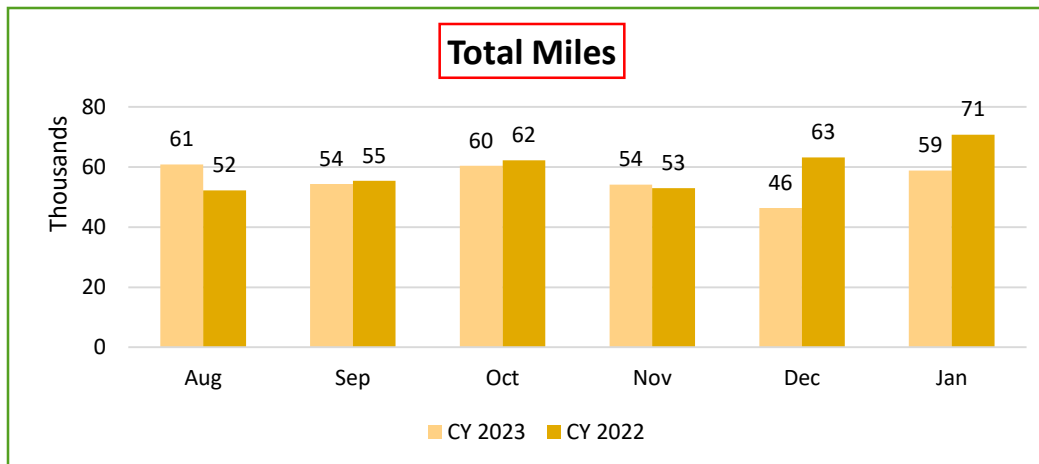
CY 2022						
	Aug	Sep	Oct	Nov	Dec	Jan
Major	0	0	0	0	0	0
Other	0	0	0	1	1	1
Total	0	0	0	1	1	1

Mean Distance Between Failures

Measures the miles between major mechanical failures on the Paratransit fleet. (Note: Higher Mean Distance Between Failures is better.)

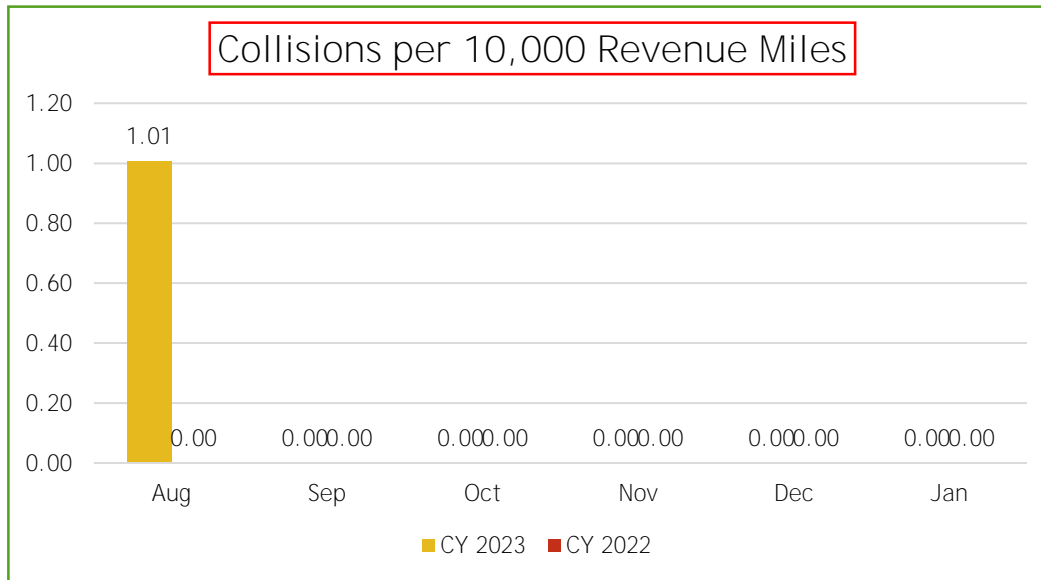


(0 indicates no mechanical failures for the month. There were no failures for July.)



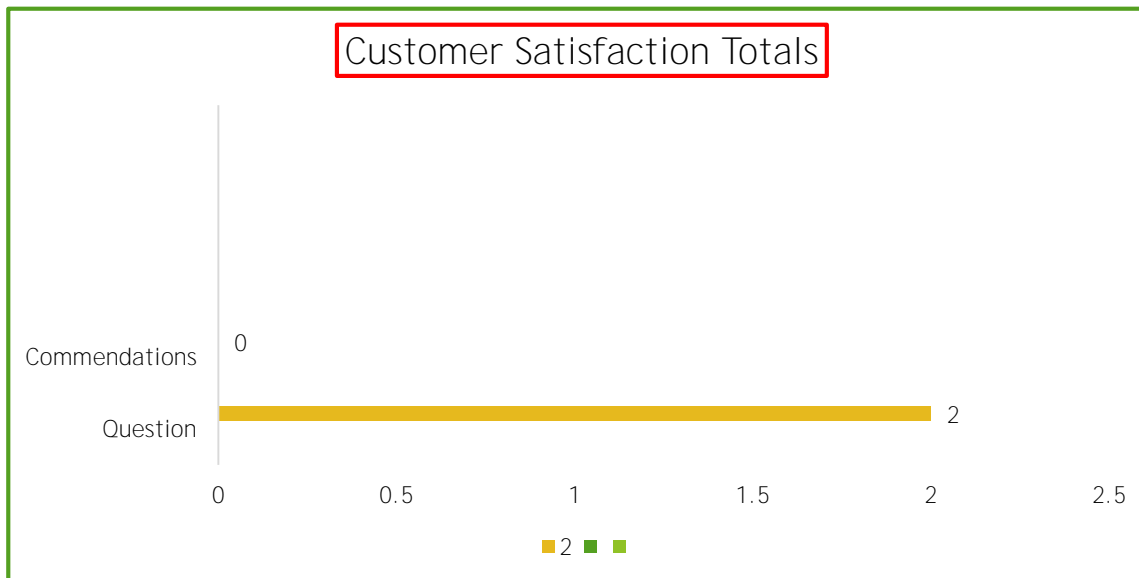
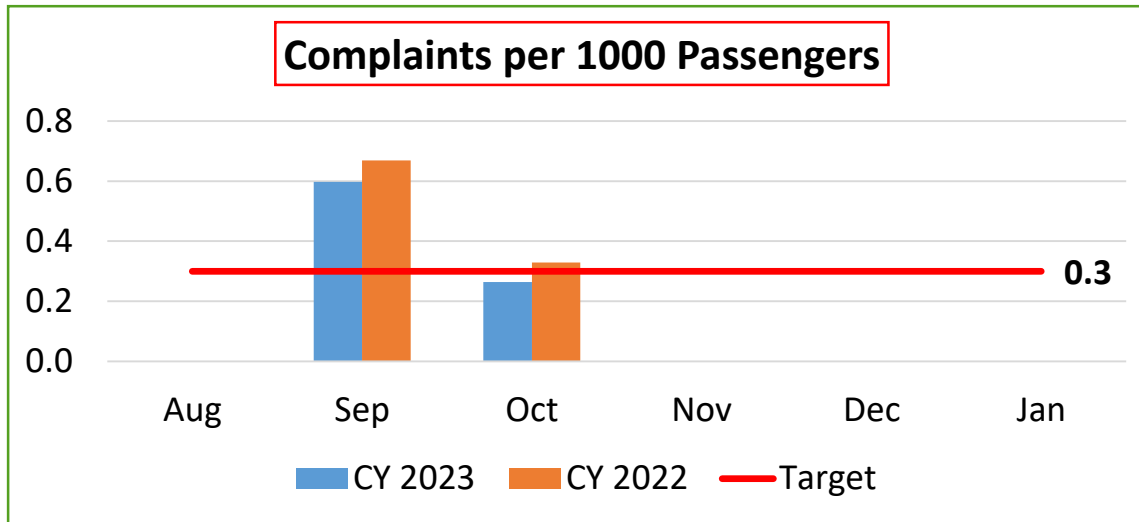
Collisions per 10,000 Revenue Miles

Measures the number of preventable collisions involving paratransit service per 10,000 miles.



Customer Satisfaction

Measures verified customer complaints about paratransit service per 1,000 passenger boardings.



TRANSIT OPERATIONS REPORT

Vinson Hines, Jr.
Chief of Operations

GoTriangle
Board of Trustees Meeting
February 28, 2024



MONTHLY FIXED ROUTE RIDERSHIP

	January 2024	January 2023	January 2019
Avg Weekday Boardings	5,692	↑ 9.9%	↓ 10.1%
Avg Saturday Boardings	3,321	↑ 41.1%	↑ 96.3%
Avg Sunday Boardings	1731	↑ 13.3%	↑ 75.2%



PARATRANSIT RIDERSHIP

	January 2024	January 2023	January 2019
Avg Weekday Boardings	152	↑ 25.6%	↓ 2.6%
Avg Saturday Boardings	51	↑ 96.2%	↑ 30.8%
Avg Sunday Boardings	34	↑ 54.5%	↑ 88.9%



WORKFORCE UPDATE: BUS OPERATOR STATUS

We continue to backfill open positions for: bus operators; bus, maintenance, and paratransit supervisors; and service attendants.

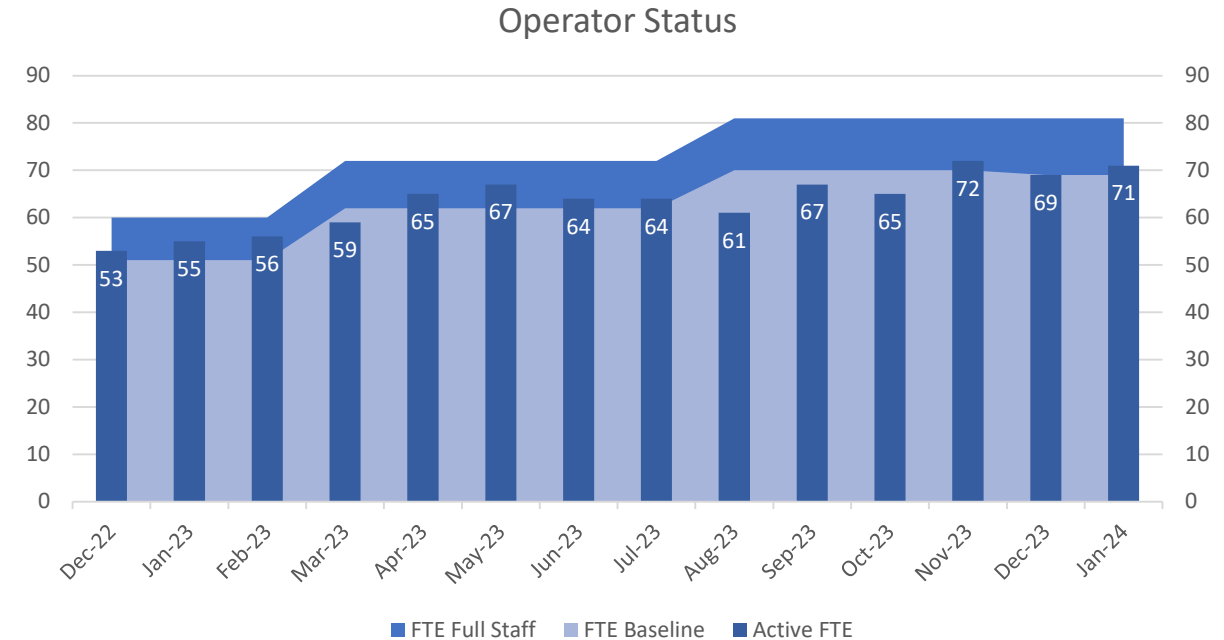
Happy to report that we are fully staffed with mechanics (14) and FT paratransit operator positions (22)

Current bus operator headcount - 71 FT and 16 PT

- 7 new hires in February class.
- New Bi-weekly training schedule: March class will start on the 4th & 25th with a goal of 10 new hires/class

Retention/Recruitment Measures

- Offer sign-on and referral bonus program
- Introduction of new Behind-the-Wheel (BTW) Training Program
 - 12-15 Certified Operators will assist in training new hires on routes, knowledge, and transit operator basics
- Class Room to Cadetting
 - Experienced New Hires 5-6 weeks training period
 - Non Experienced New Hires 7-8 weeks training period
- Online Training Video Update (New Hires can review GoTriangle routes off/on duty via any PC or mobile device)
- In coordination with Quality Assurance, Service Planning, and Operations, developed run schedule revisions to address work/life harmony
 - 10 hour shifts
 - Dedicated PT Runs
 - Route de-interlining
 - Shorter split break hours



SAFETY & SECURITY UPDATE

	January 2024	January 2023
# of Incidents Police Called	3	3
# of Incidents EMS Called	2	0

Police called CY2024 Total: (3)

January – 2023 3 incidents (2-abusive language, 1-policy violation)
January – 2024 3 incidents (2-fights, 1-disruptive passenger)

EMS called CY2024 Total: (2)

January – 2023 0 incident
January – 2024 2 incidents (1-passenger chest pain, 1-passenger need medical assistance)



SAFETY & SECURITY UPDATE

Partnership with Local Law Enforcement

On Monday, February 5, 2024, Terence Miller, our safety and compliance coordinator, was able to provide information to Cary Police related to a missing female juvenile case. She was last seen on January 20, 2024 at the GoRaleigh Bus Station at 2:20PM, and had allegedly gotten on the 100 Bus to Durham per the officer. Miller was able to pull the bus video and confirm that she boarded a GoTriangle bus, rode it to the Regional Transit Center, and returned to GoRaleigh Station that same day. Afterwards, the detective was given a copy of the video for their records.



**SEE SOMETHING
SAY SOMETHING**



UPCOMING EVENTS IN MARCH

- GoTriangle will showcase our top tier fixed route and paratransit operator talent at the **2024 Regional Bus & Paratransit Rodeo** hosted by GoRaleigh on March 3rd beginning at 9:00am – 5pm @ The GoRaleigh Operations Center located at 4104 Poole Rd. Raleigh, NC 27610. This year's event will include participant's from around the Triangle and Triad including Greensboro, Chapel Hill, GoDurham, and GoCary. The Rodeo is a competition based on general knowledge, operator appearance, driving skills and wheelchair securement, and offers a unique learning opportunity for operator teams to engage with other transit agency professionals up close and personal. The top three scorers will receive a trophy, cash prize, and the opportunity to compete at the State Bus & Paratransit Rodeo in Concord, NC on April 5th - 7th at the 2024 NCPTA Conference.
- On Monday, March 18th we will celebrate **National Transit Employee Appreciate Day!** Join in as we recognize and honor our workforce on that day. We will have fun, food, and activities to show our gratitude to our dedicated employees.



Triangle

Questions?

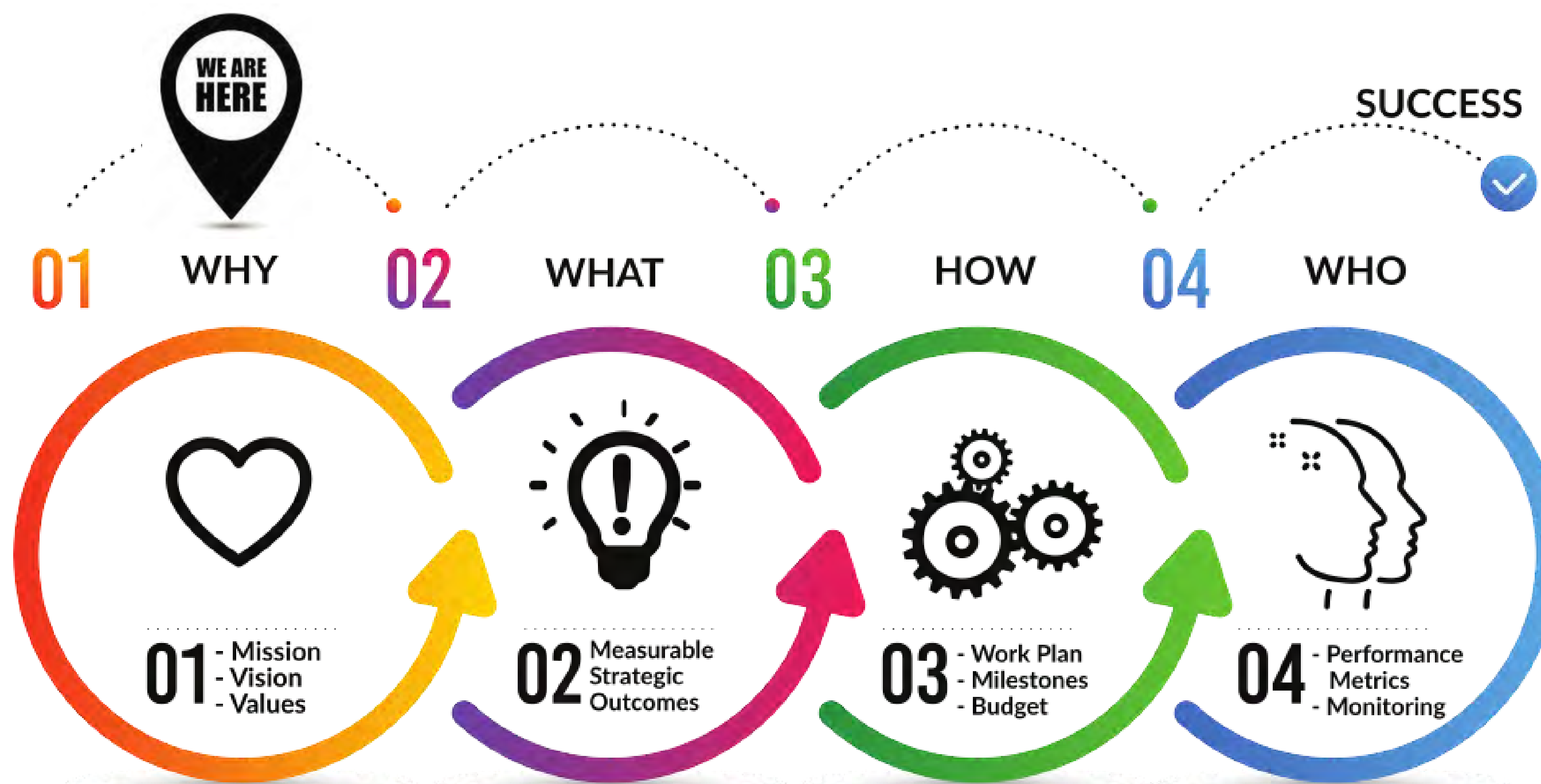


Strategic Plan Update

Board Update
February 28, 2024



TransPro's Strategic Plan Process



What we accomplished this month:



- ✓ Completed ELT Discovery Interviews
- ✓ Facilitated ELT Workshop – 2/16/24
- ✓ Summarized key takeaways from workshop

What we will work on next month:



- ✓ Want to hear from you!
- ✓ Will be scheduling Board discovery interviews to take place in March
- ✓ Identifying key stakeholder discovery interviews and will begin scheduling/conducting
- ✓ Will be meeting with GoTriangle staff (administration and operations) to obtain input around mission, vision and values
- ✓ Relationship building/growing/maintaining

Questions?



Real Estate Update

Real Estate Update

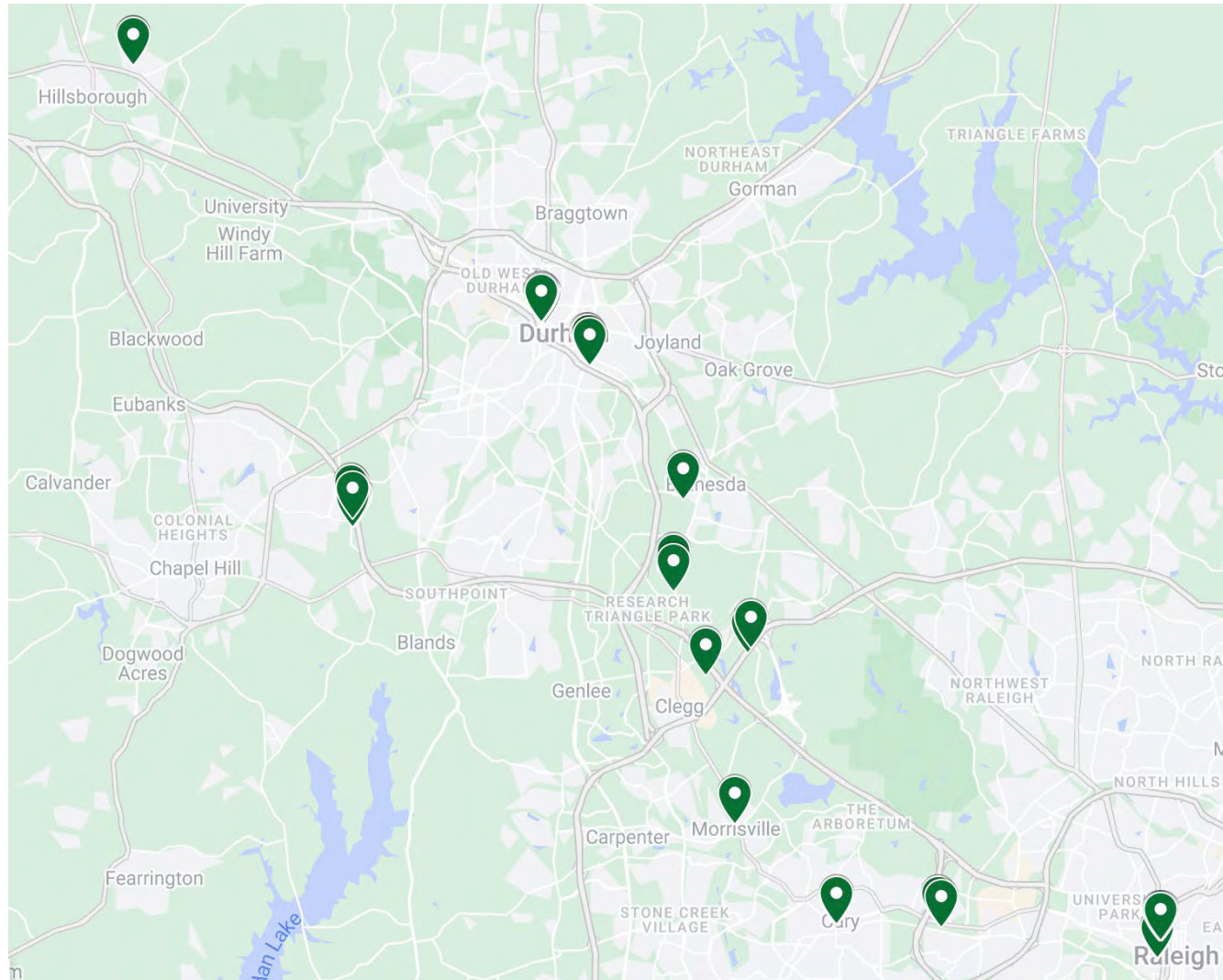
- Overview of GoTriangle Real Estate
- Hillsborough Park and Ride
- Regional Rail Properties
- Farrington Road Properties
- RUS Bus Site
- Lane Street Building
- CSX Railroad Corridor
- The Plaza Building and RTC
- The BOMF



I. Overview of GoTriangle Real Estate

- **40** parcels in Durham, Orange, and Wake County
- **26** Parcels in Durham County
- **3** Parcels in Orange County
- **11** Parcels in Wake County
- Additional **6.89** miles of railroad ROW in Wake County

I. Overview of GoTriangle Real Estate

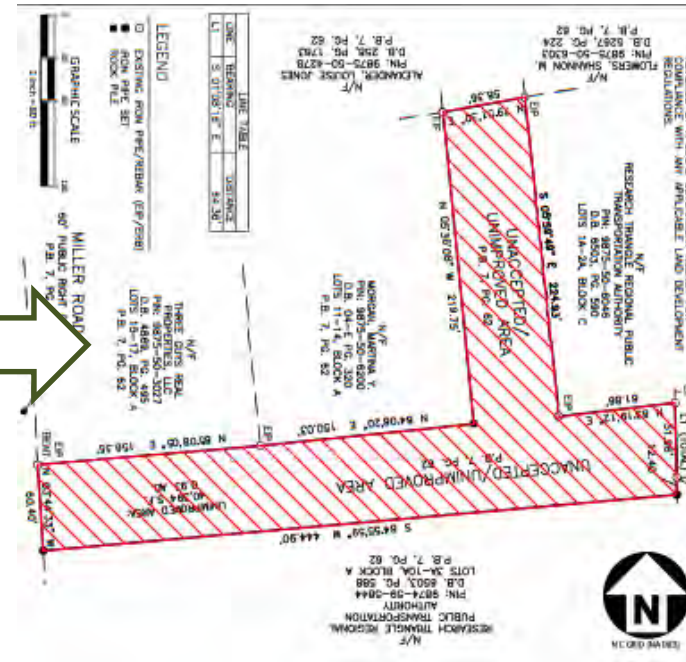
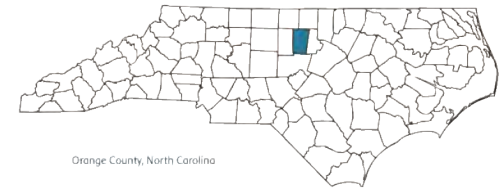


II. Orange County Parcels - Hillsborough Park and Ride



- Identified a potential site recommended by Orange County for the construction of a park and ride
- Acquired 1.81 acres from two separate property owners in 2018 for \$88,000
- Construction and operation of the park and ride required the acquisition of an area identified as “unknown right of way”
- In 2024, GoTriangle successfully acquired an additional 0.93 acres through condemnation and settlement

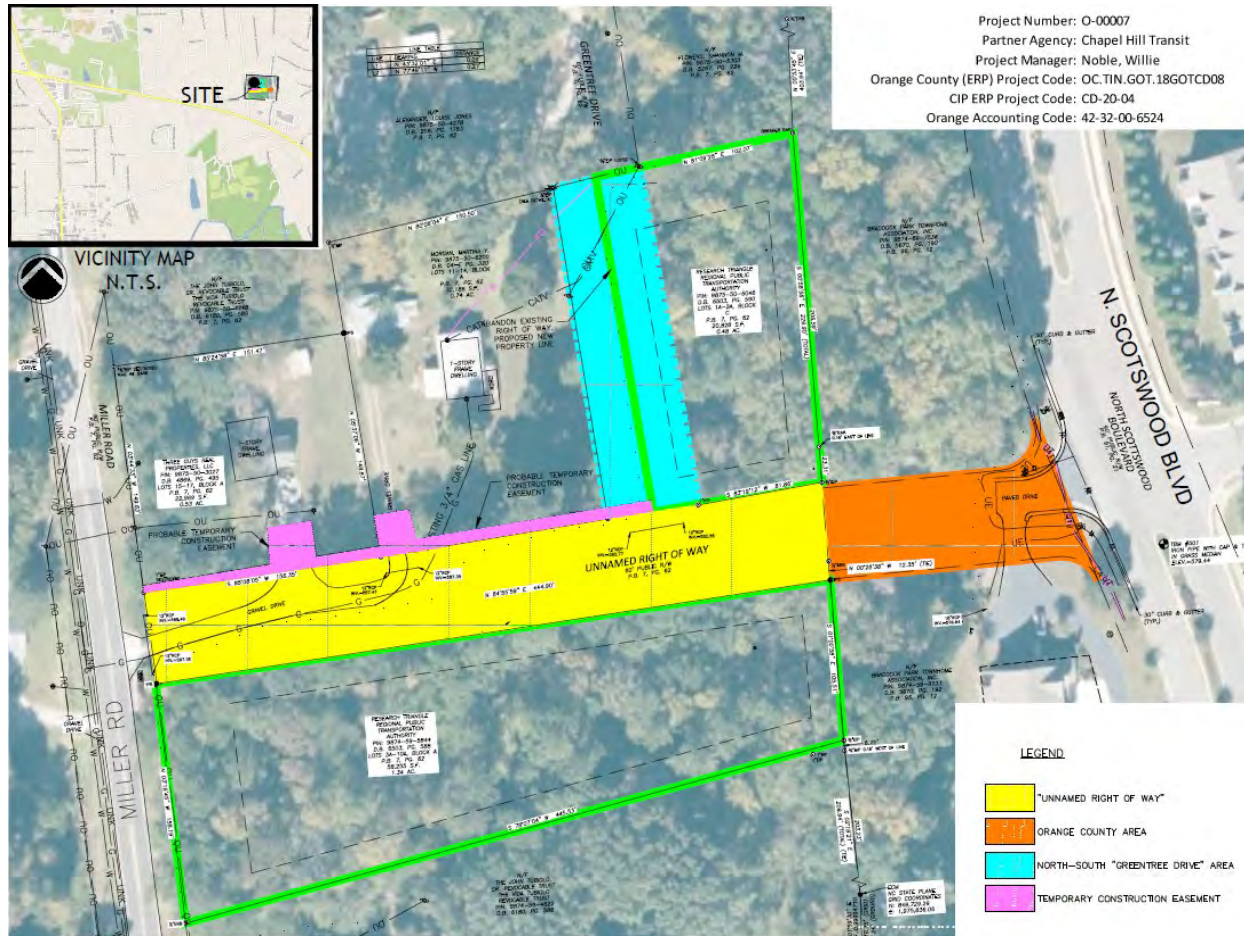
II. Orange County Parcels - Hillsborough Park and Ride



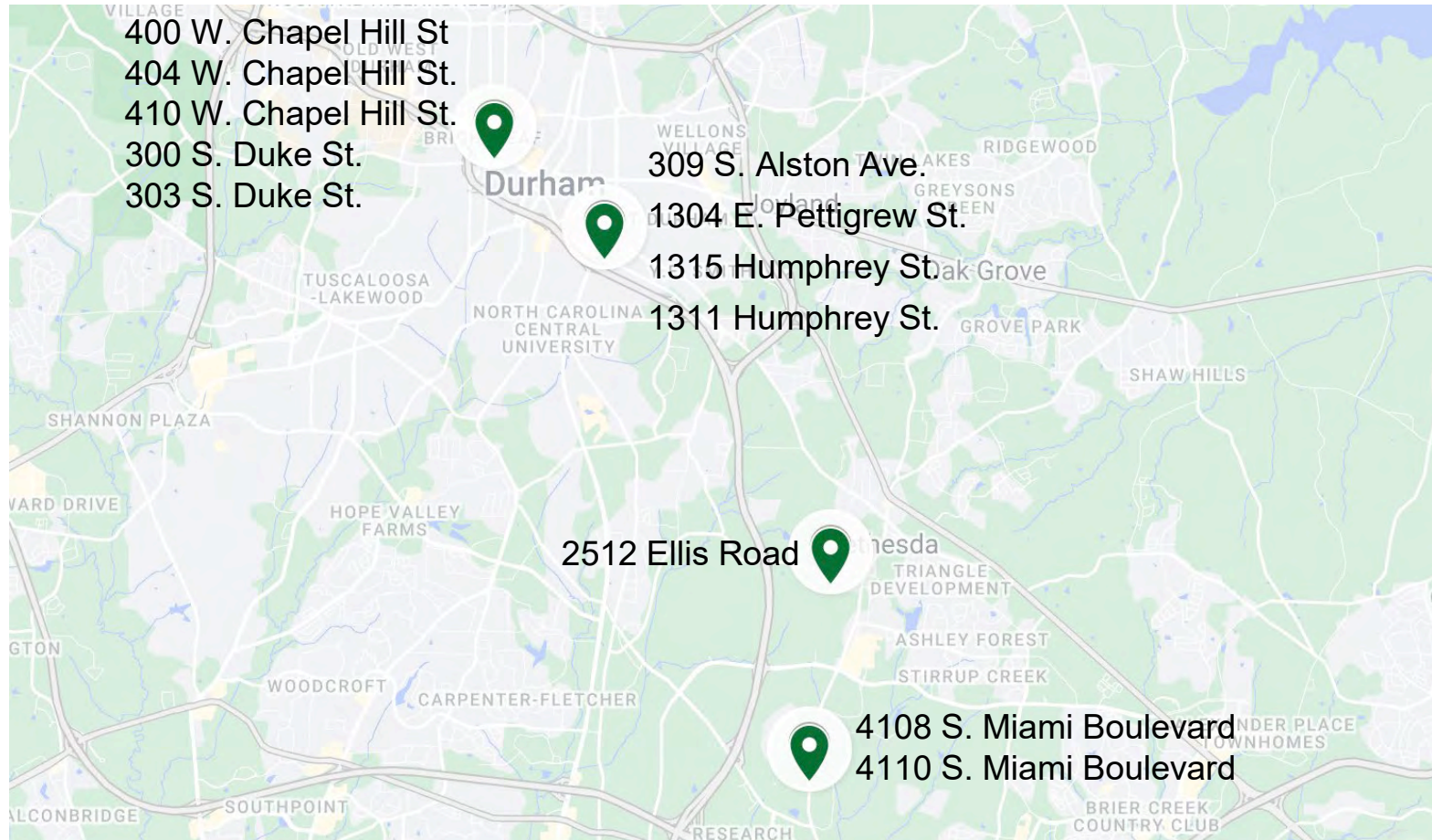
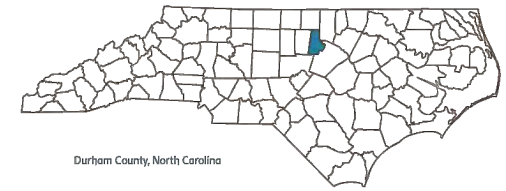
TOTAL: 1.81 acres

PURCHASE PRICE: \$88,000

II. Orange County Parcels - Hillsborough Park and Ride



III. Durham County Regional Rail Properties



III. Durham County Regional Rail Properties



NE corner of W. Chapel Hill
Street and S. Duke Street



TOTAL AREA: 1.83 acres
APPRAISED VALUE: \$2,320,000 (2021)

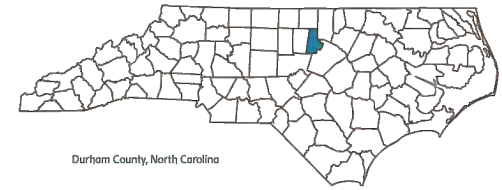
Corner of S. Alston Avenue
and E. Pettigrew Street



TOTAL AREA: 2.35 acres
APPRAISED VALUE: \$490,000 (2021)

*Property is being leased to Zachry Construction for a construction office for an NCDOT bridge project.

III. Durham County Regional Rail Properties



2512 Ellis Road



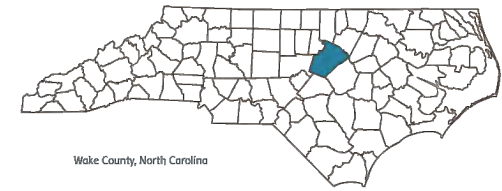
TOTAL AREA: 21.323 acres
APPRAISED VALUE: \$810,000 (2021)

4108 and 4110 S. Miami Boulevard

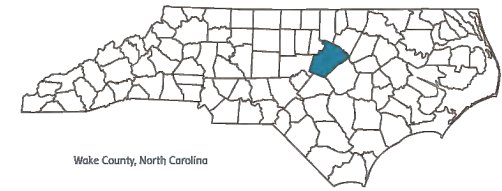


TOTAL AREA: 3.73 acres
APPRAISED VALUE: \$615,600 (2023)

III. Wake County Regional Rail Properties



III. Wake County Regional Rail Properties



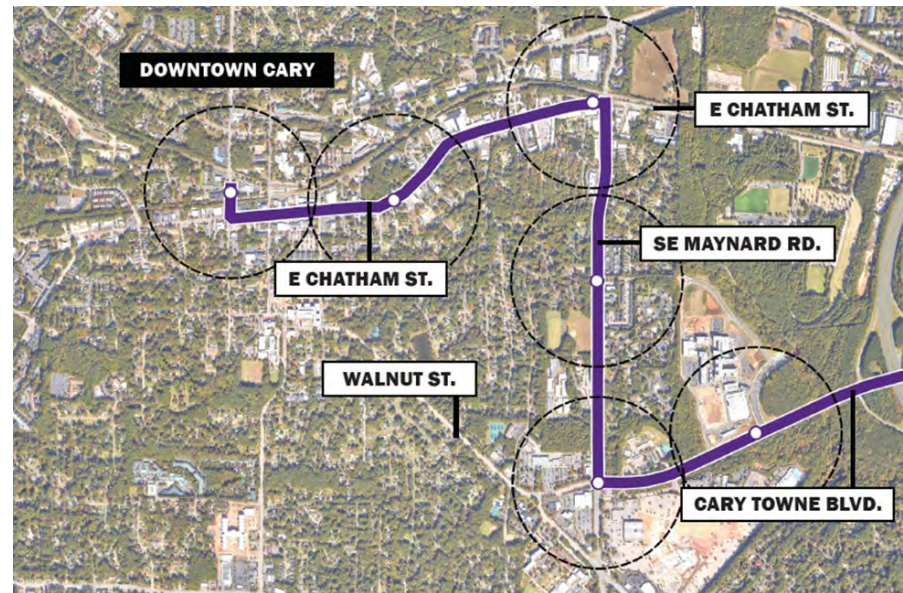
228 and 232 N. Harrison Ave



TOTAL AREA: 1.57 acres

SOLD: \$1,099,000.00

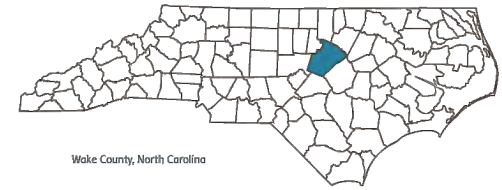
* Cary committed to dedicating 200 parking spaces for future rail or BRT.



Six identified locations supporting the Wake BRT, Western Corridor.

Source: Town of Cary

III. Wake County Regional Rail Properties



610 and 620 Corporate
Center Drive



TOTAL AREA: 1.44 acres
APPRAISED VALUE: \$576,000 (2021)

201 Morris Street



TOTAL AREA: 0.12 acres
APPRAISED VALUE: \$112,000 (2021)

IV. Former ROMF Site Properties on Farrington Road in Durham

5003 Farrington Road
 4919 Farrington Road
 5009 Farrington Road
 5013 Farrington Road
 4925 Farrington Road
 5015 Farrington Road
 5103 Farrington Road
 5017 Farrington Road
 4825 Farrington Road
 4815 Farrington Road
 4817 Farrington Road
 4809 Farrington Road
 4901 Farrington Road



Total: 23.71 Acres

V. RUS Bus Property

200-210 S. West Street



TOTAL AREA: 1.76 acres
APPRAISED VALUE: \$18,380,00 (2021)



RUS BUS Rendering

VI. Lane Street Building

324 W. Lane Street



TOTAL AREA: .99 acres
APPRAISED VALUE (2022):
 \$10,130,000 (as is), \$11,210,000 (DX-20)

324, 406 West Lane Street and 301 North Harrington Street (Vacant)



TOTAL AREA: 0.32 acres
APPRAISED VALUE (2022): \$3,140,000
 * FTA approved an incidental use for construction laydown and parking.

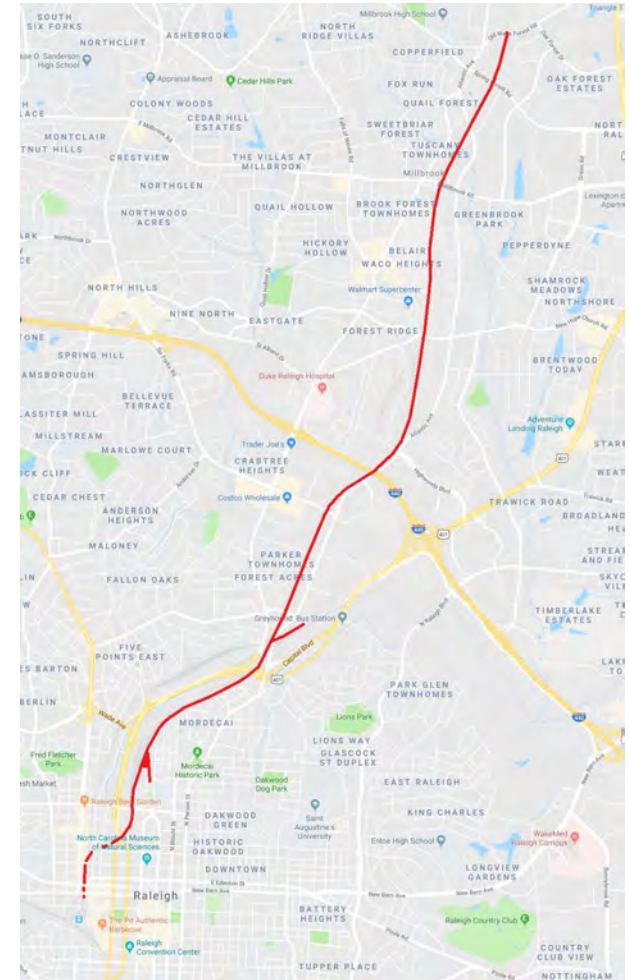
VII. CSX S-Line Corridor

- The property totaled approximately 51.69 acres. However, GoTriangle sold 1.05 acres to a developer on the open market for \$1.12 million and reimbursed the FTA and NCDOT their percentage of the proceeds.
- The northern point begins on the north side of Old Wake Forest Road and extends approximately 6.9 acres southwest to downtown Raleigh.



VII. CSX S-Line Corridor

- The property appraised for \$27,220,000 in 2019 (prior to sale of 1.05 acres to a developer).
- The federal interest is 55.7%.
- FTA is requiring GoTriangle to return the federal interest in the corridor in accordance with FTA's Circular 5010.1E.
- GoTriangle is working with NCDOT on a reimbursement plan as NCDOT needs to retain the property for the S-Line project.
- The appraisal must be updated as required by FTA 5010.1E.



VIII. The Plaza Building and RTC

4600 Emperor Boulevard
(The Plaza)



TOTAL AREA: 9.773 acres
APPRAISED VALUE: \$12,350,000 (2021)
BUILDING: 74,136 sq.ft
PARKING SPACES: 301

901 Slater Rd. (RTC)



LEASE TERM: August 31, 2025 (LC Industries)
PARK AND RIDE SPACES: 58
BUS BAYS: 10
RENT: \$3,000 per month

IX. Bus Operations Maintenance Facility (BOMF)

5201 and 5210 Nelson Road



TOTAL AREA:

5201 Nelson Road = 9 acres

5210 Nelson Road = 4.81 acres

BUILDING: 33,245 sq. ft.



Questions?