Presentations for March 2, 2023 Board of Directors Meeting
Item 6e: Monthly Ridership and Recovery Report
Key Points

- **Wintertime Slump, Strong Weekends**
  - Current wintertime ridership slump larger in magnitude compared to last year
  - Still hovering at 100% of pre-covid weekend ridership

- **Outperforming Other Regional Operators**
  - WETA: 50%-65% pre-covid depending on the season
  - Caltrain: less than 30% of pre-covid
  - BART: less than 40% of pre-covid

- **March 2023 Service Adjustments**
  - Cost and fuel savings from dwell time and other schedule adjustments
  - Cost savings from special event service adjustments
Spring Service Modifications

- **Efficiency gains, reducing operating expenses**
  - Reduction of regular Overtime
  - Slowing vessels on reverse trip to save fuel

- **Added weekday trip, Two additional weekend trips**
  - Noon trip in Richmond plugs gap in schedule
  - Added late-afternoon trips returning to east bay from SF

- **Future changes responding to market**
  - RM3-generated service improvements possible
  - Future operational savings in fueling practice
Item 9: FY24-FY28 Proposed Fare Program
FY2024-FY28 DRAFT Fare Program

Water Emergency Transportation Authority

Board of Directors Meeting

March 2, 2023
FY2024-28 Draft Fare Program

• Fare Policy Update
  ➢ Captures core principles of Pandemic Recovery Program
  ➢ Directs current and future fare decisions

• Multiyear Fare Program
  ➢ Alignment with regional operators
  ➢ Offset rising costs
  ➢ Fare predictability for regular and special events
  ➢ Special event fares to fully recover operating costs
  ➢ Board may revisit or discontinue at any time
# FY2024-28 Fare Program Summary

<table>
<thead>
<tr>
<th></th>
<th>FY2024</th>
<th>FY2025-28</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Service</td>
<td>Annual Fare Increase of 3%</td>
<td></td>
</tr>
<tr>
<td>Oakland/Alameda Special Event</td>
<td>One-time adjustment of 10% fare increase</td>
<td>Annual Fare Increase of 3%</td>
</tr>
<tr>
<td>Vallejo Special Event</td>
<td>One-time adjustment of 15% fare increase</td>
<td></td>
</tr>
</tbody>
</table>

- Staff will periodically monitor and report back to Board on Program performance
- Board may revisit or discontinue Program at any time
<table>
<thead>
<tr>
<th>Agency</th>
<th>Program/Source</th>
<th>Annual Fare Increase (Average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BART</td>
<td>Inflation Based Fare Increase Program</td>
<td>1.8%</td>
</tr>
<tr>
<td></td>
<td>Projected Financial Model (FY23-FY28)¹</td>
<td>3.4% – 4.0%</td>
</tr>
<tr>
<td>Caltrain</td>
<td>FY22-FY28 Multi-year Fare Structure²</td>
<td>6%</td>
</tr>
<tr>
<td>Golden Gate Ferry</td>
<td>Proposed FY24-FY28 Multi-year Fare Structure</td>
<td>3-4%</td>
</tr>
<tr>
<td>WETA</td>
<td>Historical Annual Fare Increase FY2015-20 Multi-year Fare program</td>
<td>3%</td>
</tr>
</tbody>
</table>

¹Estimated based on Projected Ridership Recovery
²Estimated based on FY22-FY28 Fare Structure adopted in 2021

Historical CPI San Francisco Area (2018-2022) = 3.6%
Proposed Fare Structure

Adult Clipper Fare

<table>
<thead>
<tr>
<th>Service</th>
<th>Current Fare</th>
<th>FY2024</th>
<th>FY 2025</th>
<th>FY 2026</th>
<th>FY 2027</th>
<th>FY 2028</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda Seaplane, Harbor Bay, Oakland &amp; Alameda, and Richmond</td>
<td>$4.50</td>
<td>$4.60</td>
<td>$4.70</td>
<td>$4.90</td>
<td>$5.00</td>
<td>$5.20</td>
</tr>
<tr>
<td>South San Francisco</td>
<td>$6.75</td>
<td>$7.00</td>
<td>$7.20</td>
<td>$7.40</td>
<td>$7.60</td>
<td>$7.90</td>
</tr>
<tr>
<td>Vallejo</td>
<td>$9.00</td>
<td>$9.30</td>
<td>$9.60</td>
<td>$9.90</td>
<td>$10.20</td>
<td>$10.50</td>
</tr>
</tbody>
</table>

Summary of Fare Structure:
- 25 percent surcharge fee for Paper Ticket fares
- 50 percent discount on Youth, Senior, and Disabled fares for Clipper and Paper Ticket fares
- 67 percent discount on School Groups by reservation only
## Special Events Performance

<table>
<thead>
<tr>
<th>Service</th>
<th>FY2022</th>
<th>FY2024 (Projected)</th>
<th>Ridership</th>
<th>Total Revenue</th>
<th>Total Cost</th>
<th>Farebox Recovery</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Oakland/Alameda</td>
<td></td>
<td>39,000</td>
<td>$348,000</td>
<td>$417,000</td>
<td>83%</td>
</tr>
<tr>
<td></td>
<td>Vallejo</td>
<td></td>
<td>14,000</td>
<td>$232,000</td>
<td>$292,000</td>
<td>79%</td>
</tr>
<tr>
<td></td>
<td>Oakland/Alameda</td>
<td></td>
<td>40,500</td>
<td>$405,000</td>
<td>$443,000</td>
<td>92%</td>
</tr>
<tr>
<td></td>
<td>Vallejo</td>
<td></td>
<td>16,500</td>
<td>$277,500</td>
<td>$310,000</td>
<td>90%</td>
</tr>
</tbody>
</table>

Target Range for Cost Recovery = 90% - 110%
## Proposed Special Event Fares

### Adult Fare

<table>
<thead>
<tr>
<th>Service</th>
<th>Current Fare</th>
<th>FY 2024</th>
<th>FY 2025</th>
<th>FY 2026</th>
<th>FY 2027</th>
<th>FY 2028</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oakland &amp; Alameda</td>
<td>$9.60</td>
<td>$10.50</td>
<td>$10.75</td>
<td>$11.25</td>
<td>$11.50</td>
<td>$11.75</td>
</tr>
<tr>
<td>Vallejo</td>
<td>$15.90</td>
<td>$18.25</td>
<td>$18.75</td>
<td>$19.25</td>
<td>$20.00</td>
<td>$20.50</td>
</tr>
</tbody>
</table>

### Summary of Fare Structure:
- Tickets available through Anchor System only
- 25 percent discount for Senior, Youth, and Disabled fares
Outreach Plan

• Start March 3, 2023 for minimum of 30 days
  • Combined effort by Planning & Development, Public Information & Marketing, and Government & Regulatory Affairs departments

• Public Hearing on May 4, 2023

• Outreach strategies:
  • Signage on WETA Vessels, Bay Alerts
  • Multiple languages
  • Dedicated Webpage
  • Virtual Events
  • Media, Social Media Campaign
  • Partnership with Special Event Teams
  • Community Outreach
Next Steps

• Initiate public outreach process - *pending Board approval*
• Public Hearing and Board consideration of final Fare Policy and Fare Program - *May 2023*
• Vendor coordination – *May and June 2023*
• Implementation in FY2024 - *Effective July 1, 2023*
Item 11: Business Plan Focus Area – Emergency Response
WETA 2050 Service Vision & Business Plan


Business Plan: “The How”
Agenda

- **Project Update**
  - Service Vision alternatives
  - Public outreach

- **Emergency Response**
  - Background
  - Current protocol
  - Network expansion approaches
Project Update
## Network concept summary

<table>
<thead>
<tr>
<th>Network concept</th>
<th>Terminals</th>
<th>Routes</th>
<th>Vessels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Network</td>
<td>10</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>Plan Bay Area</td>
<td>14</td>
<td>11</td>
<td>22-42</td>
</tr>
<tr>
<td>Ridership &amp; Coverage</td>
<td>18</td>
<td>17</td>
<td>36-59</td>
</tr>
<tr>
<td>Coverage Focus</td>
<td>26</td>
<td>23</td>
<td>67-87</td>
</tr>
</tbody>
</table>
Current Network

Network details
• 10 terminals
• 6 routes
• 16 vessels
Plan Bay Area

Network details
• 14 terminals
• 11 routes
• 46-51 vessels
Core Focus Network

Network details
• 18 terminals
• 17 routes
• 36-59 vessels
Coverage Focus Network

Network details
- 26 terminals
- 23 routes
- 67-87 vessels
2050 Futures

Throttle Back

Steady as it Goes

Tack to the Wind

Chart a New Course

PEAK PERIOD
SERVICE

TRAVER BEHAVIOR

TRANSIT POLICY

LASTING
CHANGES

PRE-PANDEMIC
EXPECTATIONS

ALL DAY
SERVICE
Public Outreach

- **CBO Listening Sessions**
  January 3 - 25, 2023

- **County Working Groups**
  January - February 2023

- **Business Advisory Group**
  January 18, 2023

- **Community Advisory Group**
  January 25, 2023

- **Online Community Survey**
  January 31 - March 24, 2023

- **WETA Board Workshop**
  April 2023
  *Present findings from community engagement*
Emergency Response
Focus areas

- Regional ferry network
- Community connections
- Emergency response
- Financial capacity
- Environmental stewardship
- Organizational capacity
Focus Area #2 – Emergency Response

This focus area will broadly define goals relating to the functionality (e.g., first responders, evacuation, economic recovery), capacity, and geographic reach (e.g. by terminal location, population, span of shoreline) of a comprehensive water emergency transportation system. This focus area will consider system resiliency in the context of a seismically active and climate impacted environment. These goals will serve as the basis for evaluating whether WETA’s current approach and service model is meeting demand and its mandate as a provider and coordinator of water emergency response services and what additional resources or organizational capacity may be required.

-2021 Initial Stakeholder Outreach
Stakeholder Feedback

- **Broad interest in expansion of water emergency response capacity**
  - Particular need and demand for services for communities along Bay shoreline

- **Fill gaps in the emergency response network**
  - Key crossings like Carquinez, Dumbarton, San Mateo Bridges
  - Expansion of network further north and further south

- **More flexibility in expansion criteria**
  - Ridership and productivity goals too high
  - Include regional emergency response potential
Emergency Response

Background
- Enabling legislation
- Emergency Response Resources
- Capital Funding
- Operating Funding

Current Protocol
- WETA’s Regional Role
- Organizational Capacity
- Emergency Response and Recovery
- Notable Responses
- EOC Activations and Exercises

Network Expansion Approaches
- Status Quo
- Transit Focus
- Emergency Response Focus
- Hybrid Approach
Jurisdiction and Resources

- WETA authority to coordinate emergency response extends to all water transit operators on San Francisco Bay in a declared emergency
- Acts as emergency response coordinator, but no ongoing State funding for emergency response preparations
- WETA would seek reimbursement from the State or Federal government in the event of a declared emergency to cover capital and operating costs
- Fleet resources:
  - WETA fleet
  - Blue and Gold fleet
  - Other private operators (potential)
  - Mutual aid agreement with GG Ferry
  - US Coast Guard
Emergency Response Capital Funding

• Prob 1b (2008): $250 million over a 10-year period
• Has funded capital projects that build up emergency response capabilities
• Projects included:
  • Central Bay and North Bay Maintenance Facilities
  • Downtown SF expansion
  • Richmond
  • South SF
  • Fleet Procurement
  • Emergency Floats (Pier 48.5)
• Dual purpose projects up until now
Emergency Response Operating Funding

- WETA has no ongoing funding source for emergency response preparations or operations
  - WETA's operating funding is currently only for transit operations
- May need direct funding streams for increased operating expenses immediately after a declared emergency/disaster
- Public assistance sources for reimbursement:
  - FEMA Public Assistance Program
  - FTA Emergency Relief funding
  - FHWA Emergency Relief funding
Current Protocol
Regional Structure

WETA’s Role:

• Assess and monitor status of water transit resources
• Manage and coordinate WETA assets, mutual aid assets, and contracted vessels
• Create and implement an emergency water transportation service plan at the direction of Cal OES
Response Phase Overview

- Triggering Event
- Immediate Response
- Deploy Resources
- Sustained Response
- Short Term Recovery (within 5 days)
- Long Term Recovery (5+ days)
Organizational Capacity

- Currently, no FTE dedicated to emergency response activities
- Larger agencies have designated emergency response and preparedness managers and staff
- Emergency preparedness work is decentralized and spread across various WETA staff
  - Government Affairs
  - Planning
  - Marketing & Communications
  - Finance
  - Operations
Recent and Upcoming EOC Exercises

• No declared emergencies requiring WETA EOC activation since creation of the agency

• COVID-19 response partial EOC activation (2020)
  • Liaison
  • Public Information Officer (PIO)

• Recent full EOC activation exercises:
  • 6/29/2022
  • 12/14/2021

• Upcoming EOC exercises:
  • June 2023
  • Fall 2023 (full-scale exercise)
Network Expansion Approaches
## Current Capacity

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Capacity (seats):</strong></td>
<td>~6,000</td>
</tr>
<tr>
<td>Total Fleet</td>
<td></td>
</tr>
<tr>
<td><strong>Bay Bridge Capacity:</strong></td>
<td>4% - 8%</td>
</tr>
<tr>
<td>% of Peak Hour Capacity of</td>
<td></td>
</tr>
<tr>
<td>Bay Bridge Corridor</td>
<td></td>
</tr>
<tr>
<td><strong>Reach:</strong></td>
<td>4</td>
</tr>
<tr>
<td>Number of Regional</td>
<td></td>
</tr>
<tr>
<td>Superdistricts Served</td>
<td></td>
</tr>
</tbody>
</table>
Scenario 1: Continue Status Quo

- All WETA transit facilities double as emergency response facilities
- Agency operates primarily as a transit provider with emergency response capability built into the system
- All transit projects are built to essential facility standards
- Current terminal locations required to be financially and operationally feasible for passenger service
Scenario 2: Transit Approach

- Prioritizes use of limited funds for transit projects
- New terminals may or may not be built to essential facility standards
- Potential for project cost and time savings
- Right-size vessels for transit purposes
- Be strategic about which terminals have emergency response capability
- Example: Berkeley, Albany, Emeryville
  - One of three built to essential facility standards
  - All three would have ferry service
  - Proximity—unnecessary redundancy in an emergency
Scenario 3: Increased Emergency Response Approach

- Allows for projects to serve primarily an emergency response function
- Requires pursuit of new capital, O&M funding sources
- Existing transit funds would continue to advance WETA’s transit projects
- Allows for greater reach and flexibility in the event of an emergency
- Example: New terminal in a low-density area.
  - Ridership base too small for regional ferry service
  - Fills a gap in the emergency response network
  - Constructed and maintained with new funding sources
Scenario 4: Hybrid Approach

- **System expansion continues with a combination of projects:**
  1) *Transit exclusive* projects
  2) Projects with both functions
  3) *Emergency response exclusive* projects

- **Only possible with a new emergency response operating and maintenance funding source**

- **Allows greater flexibility in WETA’s project delivery model**
Discussion

• Should WETA consider alternative approaches to emergency response in terms of network expansion?
• If yes, what goals or outcomes should an alternative approach prioritize?
Bay Ferry 2050 microsite

bayferry2050.org

WETA staff contacts

Mike Gougherty Gougherty@watertransit.org
Gabriel Chan Chan@watertransit.org