



Finance and Capital Committee

Information Item III-B

June 8, 2023

Metro Lift Income-Qualified Fare Program

Washington Metropolitan Area Transit Authority

Board Action/Information Summary



Action



Information

Document Number:
205515

Resolution:



Yes



No

Presentation Name:

Metro Lift Income-Qualified Fare Program

Project Manager:

Jim Bongiorno

Project Department:

Planning and Performance

Purpose/Key Highlights:

- The Metro Lift Income-Qualified Fare Program aligns with Metro's Strategic Transformation Plan regional opportunity and partnership goal to design transit service to move more people and equitably connect a growing region.
- Metro Lift was designed to be customer-friendly and minimize access barriers.
- Metro Lift provides a 50 percent discount on Metrorail and Metrobus trips for customers enrolled in the Supplemental Nutrition Assistance Program (SNAP) in the District of Columbia, Maryland, and Virginia.
- The Metro Lift program will launch on Tuesday, June 20, 2023, for online enrollment, with in-person enrollment to follow on Monday, June 26.
- Metro's communication and outreach effort for Metro Lift will be included as part of the comprehensive fare and service messaging.

Interested Parties:

None

Background:

In October 2021, the Metro Board adopted fare policy principles emphasizing that Metro's fares and practices should be equitable and promote broad access to regional destinations. Under the regional opportunity and partnership goal in Metro's Strategic Transformation Plan is the following objective statement: Align regional service networks, fare and service policies and supporting infrastructure to increase convenience, use of transit, equity in the region, and the role equity plays in Metro's decision making.

According to passenger surveys, low-income riders make up approximately 15 percent of Metrorail and approximately 50 percent of Metrobus ridership. Metro fares represent a higher percentage of low-income riders' transportation expenses as compared to riders with higher incomes, particularly as they are the least likely to receive tax or employer subsidies through SmartBenefits®.

Targeted reduced fare programs ensure that Metro's services remain affordable for the riders that rely on public transit the most. Metro's 50 percent discount reduced fare currently extends to the following:

1. Seniors (age 65 or older)
2. People with Disabilities under the age of 65

Registration of these programs is administered in person at Metro's Transit Accessibility Center. Senior SmarTrip® cards may also be obtained at other locations throughout the region, such as commuter stores and Montgomery County public libraries.

According to a 2021 Journal of the Transportation Research Board study, 17 out of the 50 largest transit agencies currently have low-income fare programs. These low-income fare programs are either administered by the agency or the jurisdiction in which they operate. The discounts offered through these programs typically range from 20 to 50 percent.

Income-based eligibility criteria for enrollment in the Supplemental Nutritional Assistance Program (SNAP) are consistent in the District of Columbia, Maryland, and Virginia. All three jurisdictions have established criteria to include households with gross income up to 200 percent of the federal poverty level. The Federal Poverty Level accounts for household size and is updated annually by the United States Department of Health and Human Services (HHS). Approximately 471,000 residents in WMATA's compact jurisdictions are enrolled in SNAP, 20 percent of which are estimated to be Metro customers not currently eligible for a reduced fare.

Metro applied survey data on low-income trips to current ridership to estimate the impact of the 50 percent discount with the FY2024 fare structure change. Staff made directional assumptions of what share of Metro's classified low-income trips would qualify based on likelihood of SNAP enrollment and potential eligibility for existing discount programs. The FY2024 budget impact (\$4M) assumes revenue loss associated with approximately five million trips taken with the Metro Lift discount. Estimates are sensitive to eligibility and participation assumptions made as well as external variables, for example:

- Variations in regional SNAP enrollment
- Awareness of the program among eligible population
- Potential enrollment by ineligible participants
- Other unanticipated events, circumstances, or changes in economic or Metro's operating conditions.

Discussion:

Metro Lift will provide a 50 percent discount on Metrorail and Metrobus trips for customers enrolled in the Supplemental Nutrition Assistance Program (SNAP) in the District of Columbia, Maryland, or Virginia. The discount is not applicable to parking, MetroAccess fares, or unlimited pass purchases, and cannot be applied to SmarTrip® cards enrolled in another Metro reduced fare program (Senior SmarTrip®, Reduced Fare IDs, Kids Ride Free, or U-Pass cards).

Customers will have the ability to enroll in Metro Lift online through the Metro website and at in-

person enrollment locations. Customers enrolling in-person will have the option of scheduling an appointment to reduce potential wait time. Eligible customers will be able to sign up benefiting household members at the same time as they complete their individual enrollment. Language translation services will be available.

When enrolling, customers will be requested to provide contact information, their SmarTrip® card number (and their household SmarTrip® card numbers, if applicable), an image of federal or state issued photo identification, and an image of their Electronic Benefit Transfer card. Customers enrolling additional household members will also be requested to provide proof of their SNAP benefits letter. The collection of this information will allow Metro to verify the customer's eligibility and send the discount directly to the customer's existing SmarTrip® card. At the end of one-year, the Metro Lift discount will expire and eligible customers will need to re-enroll. Customers that agree to receive notifications will be reminded via email or text to re-enroll in the program as their Metro Lift expiration date approaches.

While Metro is not the first transit agency to implement a low-income fare program, Metro would be an early adopter of several features that will make the program more accessible and seamless for customers. The first feature is the ability to send the discount to customer's existing SmarTrip® cards through Metro's fare system. After the customer completes their enrollment online, the Metro Lift discount is sent to the customer's SmarTrip® card. Customers activate it on their SmarTrip® card by tapping on a Metrorail faregate, Metrobus farebox, or fare vending machine (may take up to 48 hours for the discount to appear in the fare system). From that point, the Metro Lift reduced fare is applied to all Metrobus and Metrorail trips taken using that SmarTrip® card (physical or virtual). This process prevents the need to provide specialized cards in a manner that is less convenient for customers and more administratively burdensome for Metro (e.g., via mail or exclusive in-person pickup).

Secondly, to increase the speed of availability for customer use, Metro will send the Metro Lift discount to the customer's SmarTrip® card following their completion of the online enrollment. For customers that choose to enroll in-person for Metro Lift, they will be able to leave with the discount activated on their SmarTrip® card. If further review of the customer's enrollment indicates that the customer did not provide adequate proof of eligibility, Metro will schedule a removal of the discount.

The Metro Lift program design prioritizes accessibility and ease of use for customers. Metro acknowledges the potential risk of ineligible use and has controls in place (and planned for future implementation) that are believed to mitigate this risk while not compromising the customer enrollment experience.

Funding Impact:

There is no funding impact from providing this information item. Revenue loss and administrative costs associated with the Metro Lift program are funded in the FY2024 Budget.

Previous Actions:

April 2023 – Board adopted the FY2024 Budget which includes implementing a regional low-income fare program.

Next Steps:

The launch of Metro Lift online enrollment is scheduled for Tuesday, June 20, with in-person enrollment to follow on Monday, June 26. Communications and outreach activities on Metro Lift will

be included as part of the overall FY2024 fare and service changes and will feature in-person outreach, advertising, signage, and targeted material distribution.

Staff will monitor enrollment trends closely to flag and resolve customer issues. Staff will also be able to report data on number of participants and trips taken with Metro Lift.

In the near term, Metro will work to incorporate other regional transit operators interested in accepting the discount and continue to expand in-person enrollment opportunities and program communications. Longer-term, planned fare payment system upgrades and external coordination will enable additional program improvements.

Recommendation:

Information Only

Metro Lift

Income-Qualified Fare Program

Finance and Capital Committee

June 8, 2023



Purpose

- Provide an update on the Metro Lift Income-Qualified Fare Program, including the discount offered, eligibility requirements, the enrollment process, and program launch details

Strategic Transformation Plan Goals



Regional Network and Partner Service Optimization and Transit Equity

Align regional service networks, fare and service policies and supporting infrastructure to increase convenience, use of transit, equity in the region, and the role equity plays in Metro's decision making

- Launch **Income-Qualified Fare Program** that is customer-friendly and minimizes access barriers for customers in FY2024, with additional features phased in as the program matures

Metro Lift Discount

- 50% off Metrobus and Metrorail trips¹ with yearly re-enrollment
- Comparable to reduced fares for people with disabilities and seniors, but distributed as a pass instead of a separate card



1. Discount not applicable to parking, MetroAccess fares, or unlimited pass purchases. Cannot be applied to SmarTrip® cards enrolled in another Metro reduced fare program

Eligibility and Participation

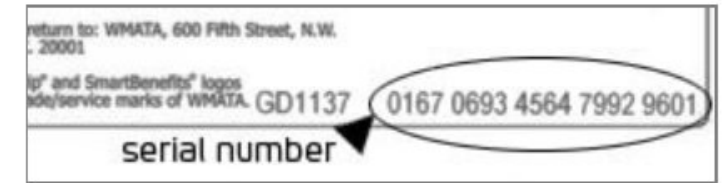
- Metro Lift is for customers enrolled in a jurisdictional Supplemental Nutrition Assistance Program (SNAP) or in a household receiving SNAP benefits
 - Approximately 471,000 SNAP enrollees in region,¹ 20% of whom are estimated to be Metro customers not currently eligible for a reduced fare
 - Consistent income-based eligibility criteria across the District of Columbia, Maryland, and Virginia²
- FY2024 budget impact (\$4M) assumes revenue loss associated with approximately 5 million trips taken with Metro Lift



1. In WMATA compact jurisdictions, according to July 2021 data from the U.S. Department of Agriculture Food and Nutrition Service. Figure upscaled to account for adjustment to Virginia's expanded eligibility effective October 2021
2. Up to 200% of the federal poverty level under broad-based categorical eligibility policies

What Customers Can Expect When Enrolling

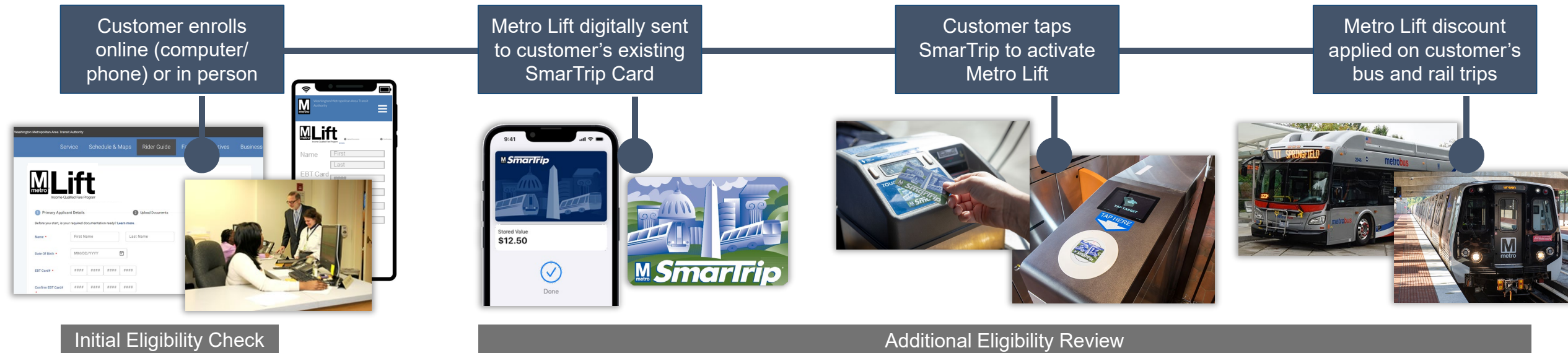
- Ability to enroll individually or for your household online and in-person
- Customers will be requested to provide:
 - Contact information
 - SmarTrip® card number (physical or virtual) for themselves and their household members¹
 - Image of federal or state issued photo identification
 - Image of Electronic Benefit Transfer (EBT) Card



1. Customer's enrolling their household members will also be asked to provide a copy of their SNAP benefits summary

How Customers Receive Metro Lift

- 50% Metro Lift discount applied to physical or virtual SmarTrip® cards after submitting enrollment
 - Discount available for use within 48 hours for customers enrolling online, immediately for customers enrolling in-person

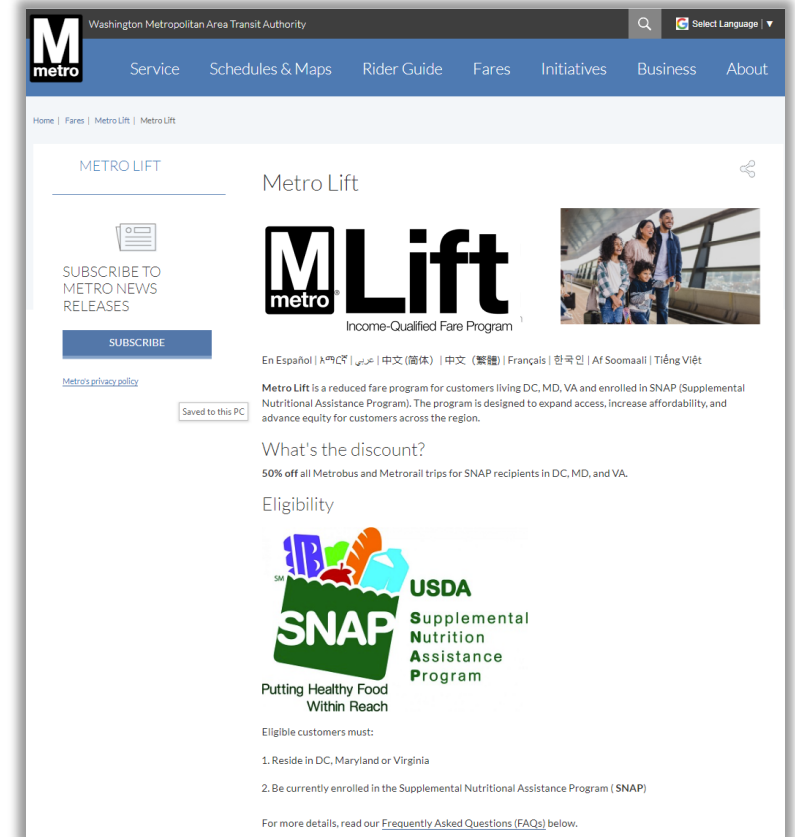


Initial Eligibility Check

Additional Eligibility Review

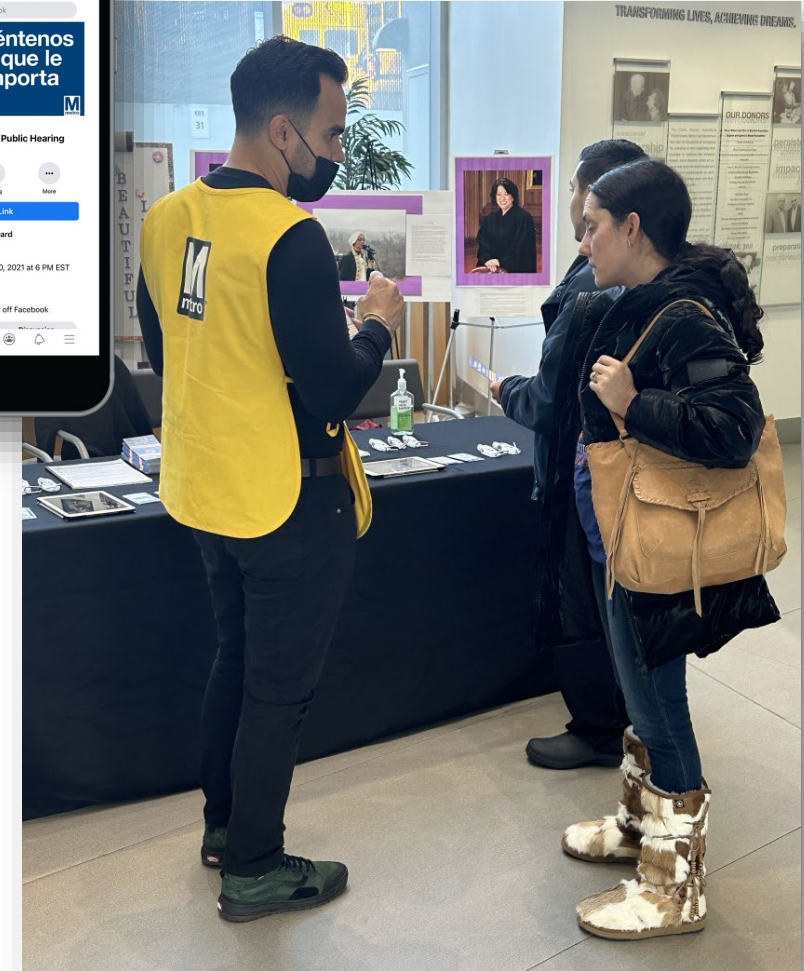
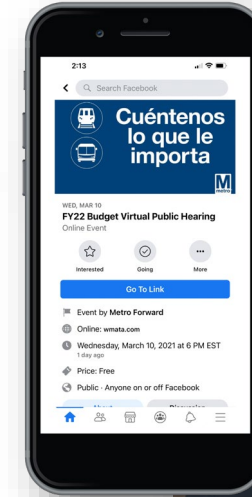
When Customers Can Enroll

- Program launches Tuesday, June 20, 2023
 - Online enrollment opens
 - In-person appointment scheduling begins
 - In-person enrollment centers* open Monday, June 26, 2023
 - **Metro Center Rail Station Mezzanine** (12th & F Street NW)
 - **Metro Office Building at L'Enfant Plaza** (300 7th Street SW)
 - **Metro Office Building at New Carrollton** (4100 Garden City Dr.)
- *Hours of Operation: Monday – Thursday: 8:00am to 4:00pm, Friday: 8:00am to 6:00pm. Appointments available to avoid wait times
- Working to partner and expand in-person enrollment opportunities



Communications & Outreach

- Included as part of a comprehensive fare and service changes rollout
 - Press release and social media posts
 - In-person outreach at all Metrorail stations
 - Paper and digital signage
 - Paid advertisements (Digital and radio, English and Spanish)
- Metro Lift website will include information, FAQs, appointment registration, link to online enrollment form, multilingual toolkit, “how to enroll” video
- Continued outreach and material distribution at targeted locations, including SNAP locations, social service agencies, community events and fairs



Program Vision

Administer an Integrated, Regional Reduced Fare Program

Launch (FY2024)

- 50% off Metrobus and Metrorail trips for customers enrolled in SNAP
 - Opportunity for regional operators interested in accepting the Metro Lift discount to join
- Online and in-person enrollment options with language translation support
- Discount applied directly to customers' existing SmarTrip cards
- Discount expires one year after activation (customers able to re-enroll)
- Pursuing additional partnerships and in-person enrollment opportunities

Vision (Beyond FY2024)

- Explore integration with jurisdictional social service agencies to further automate enrollment process
- Expand online enrollment to Metro's other reduced fare programs to create an integrated experience for seniors, people with disabilities, and low-income customers
- Adjust discount expiration beyond one year
- Expand reduced fare discount to the purchase of unlimited pass products
- Empower users with clearer account-based visibility into program enrollment, expiration date, etc.