

Regional Transit Assistance Program Pilot

The purpose of this Transit Assistance Program Pilot (TAP) is to enhance mobility and ensure equitable access to transit services by providing funding for transit agencies to offer fully subsidized fixed-route and/or paratransit access trips for adults with low or no income. This program is intended to support the goals of the Wake, Durham, and Orange Transit Plans while supporting equity, climate sustainability and transportation demand management by increasing access to transit and reducing barriers to regional transit opportunities. This program, funded by Wake Transit and the Durham and Orange County Transit Work Plans, will support transit agencies that charge fares with helping people with limited financial resources manage transportation costs by covering the cost of transit trips in the Triangle Region. Participating transit providers that resume fare collection are eligible to participate in the program to obtain reimbursement for zero-fare trips taken by customers with low or no income. Funding for this program will be allocated to transit agencies through the annual work program processes in each of the three counties.

Objectives for the pilot year include (1) maximizing use of the program among eligible individuals, (2) minimizing administrative overhead costs relative to the overall cost of the program, and (3) gathering data that can be used to develop more refined administrative procedures for the program following the pilot period.

1. Eligibility Criteria

- a. Trips eligible for reimbursement must be made by individuals certifying that they meet the following criteria:
 - a. Income: For the pilot year (FY25) income criteria will be as follows:
 - Qualify for Medicaid, or
 - Qualify for EBT/SNAP, or
 - Have household income less than \$35,000 per year.
 - b. Age: Paratransit riders of any age meeting income criteria in section 1.a.a. will be eligible for TAP. For fixed-route riders, the following age-based criterion will also apply to eliminate overlap with existing free fare programs:
 - Riders must be adults aged 19 to 64.
 - Youth ages 13-18 are eligible for a Youth GoPass.
 - Adults ages 65 and older are eligible for a Senior GoPass.

2. Enrollment Process

- a. The pilot program will utilize an online enrollment portal through which eligible participants will register and receive a regional GoPass benefit program activation code for the Umo mobile ticketing platform. Participants will be able to use the activation code to activate GoPass on their Umo account through the Umo mobile phone app or online passenger portal if their account is created through a linked Umo smartcard. Paratransit riders will also use the portal to enroll in the program. Codes issued during the pilot will be valid through September 30, 2025.

- b. Each participating agency must offer in-person enrollment assistance in at least one physical location in its service area. Agencies are encouraged to partner with human services providers and other organizations to promote the program and assist with online enrollment.
- c. Each participating transit agency may also distribute physical fare media such as day passes, weekly passes, or monthly passes through direct-service partners as a supplemental means of ensuring individuals who qualify for the program are able to benefit from the program during the pilot period.

3. Eligibility Monitoring

- a. Enrollment will be monitored during the pilot period and eligibility monitoring activities will be performed if enrollment exceeds expectations based on recent on-board survey data.
- b. An enrollment eligibility monitoring plan for the pilot year is in development and will be shared with the Wake Transit Fare Work Group and Staff Working Group stakeholders in Durham and Orange counties for input.
- c. Procedures for eligibility monitoring and verification to be performed following the pilot period will be developed during the pilot year.

4. Fare Structure

- a. The program will offer zero fare trips for eligible participants.
- b. Fare structures may be subject to periodic review to ensure alignment with program goals and financial sustainability.

5. Confidentiality

- a. Access to participant data will be restricted to authorized personnel involved in the administration of the program.
- b. Any confidential information collected during enrollment and/or subsequent monitoring processes will be treated in accordance with applicable privacy laws.

6. Program Outreach and Communication

- a. Participating organizations will implement outreach strategies to inform the community about the program, its eligibility criteria, and application process. Organizations receiving Wake Transit funding should follow the Wake Transit Community Engagement Policy.
- b. Communication channels may include but are not limited to, website announcements, social media, community events, and collaboration with local support organizations.

7. Program Evaluation

- a. Continuous evaluation will be conducted to assess the impact and effectiveness of the program.
- b. Feedback from participants and stakeholders will be considered in refining the program to better serve the needs of the community.

- c. The Wake Transit Fare Work Group and Staff Working Group stakeholders in Durham and Orange counties will be engaged in the process to develop recommendations for second-year program continuation and/or revisions.

8. Reimbursement Process

- a. Usage data will be used to develop reimbursement requests. Potential methodologies to determine reimbursable cost will be evaluated by the Wake Transit Fare Work Group and Staff Working Group stakeholders in Durham and Orange counties prior to agencies submitting Q1 reimbursements. The methodology could include charging a set cost per trip, charging a daypass rate per active rider per day, a combination thereof, or other approach determined to meet goals for equity and ease of administration.
- b. Providers will also have the ability to offer a non-software-based process utilizing a conventional pass.
 - The Partner will submit a spreadsheet/verification on organizational letterhead that includes the pass/card detail log (i.e. Pass/unique number) and include a total of passes distributed during the requested period.
 - The Transit Service representative and Finance representative who approves the reimbursement template will sign the verification on organization letterhead validating that the information is correct.
 - Each pass/unique number submitted will be reimbursed at the face value of the pass (e.g. \$5 for a regional day pass).
- c. Budget for the Pilot period
 - Transit partner reimbursements will be capped at the amount that is finalized in the adopted budget as part of the pilot program.
 - i. Adjustments to the annual budget are allowed via the amendment process but are not guaranteed to be adopted.
 - Future-year financials will be evaluated and adopted during the Annual Work Program process.