

# Evaluation of Somerville’s SPS and CAAS Free Transit Pass Pilot Programs (October 2024)

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# Introduction

## Project Background

From 2022 to 2024, the City of Somerville undertook two new pilot programs aimed at increasing transit accessibility for its residents. The first program is known as the Somerville Public Schools (SPS) Parents and Guardians Transit Pass Program and the second program is known as the Community Action Agency of Somerville (CAAS) Low-Income Transit Pass Program. These programs, which are described in more detail below, were collectively financed with just under \$2 million in funding from the American Rescue Plan Act (ARPA) and provided free MBTA transit passes to low-income individuals.

In February 2023, MAPC executed an ARPA-funded contract with the City of Somerville to provide an evaluation of the free transit pass programs for SPS and CAAS. The goals and results of the evaluation are detailed in the report sections that follow. At the time of the contract between MAPC and the City, a system-wide low-income fare on the MBTA had not yet been implemented, so the Somerville transit pass programs at the time were seen as potential proof of concept for broader low-income fare policies and initiatives. Now that the MBTA has launched a system-wide low-income fare program as of September 2024, it is MAPC's hope that the Somerville transit pass program evaluation can illustrate the benefits that discounted transit programs offer, as well as lessons learned to enhance the administration and evaluation of such programs in the future.

### *Pilot Program 1: Somerville Public Schools Parents and Guardians Transit Pass Program*

The City's "SPS Parent/Guardian Transit Pass Program" seeks to deliver economic relief to families via free bus and subway transit passes. These passes are available to Parents and Guardians of SPS students of any age or grade level. This pilot program involves the bulk purchase of MBTA LinkPasses via the PERQ program and their distribution to SPS households identified by SPS Family Liaisons on a means-tested basis. The Liaison Team works with families, schools, and SPS departments to promote home-school partnership. This pilot program launched in January 2023 and initially concluded in June 2024, but was then extended for another school year starting in September 2024 using City funds. Over 1,000 transit passes were distributed as part of this pilot, but according to the data shared by the MBTA only 741 were actually used. This program builds off the City's existing M7 program which provides free monthly passes to all Somerville Public School students in grades 7-12.

### *Pilot Program 2: Community Action Agency of Somerville (CAAS) Low-Income Transit Pass Program*

The City's "Low Income Transit Pass Program" aimed to offer economic relief via free bus and subway transit passes. This pilot program was carried out in partnership with the Community Action Agency of Somerville (CAAS), the federally designated anti-poverty agency serving Somerville who administered the program. The main goals of the pilot program were to provide economic relief, simplify access to work, school, and other key destinations, and promote the use of public transportation. Under this program, MBTA LinkPasses were purchased in bulk via the PERQ program and then distributed to just over 300 individuals currently receiving or who qualify for public benefits through CAAS, or who are eligible for CAAS' Housing Advocacy Program with income at or below 200% of the federal poverty level. Of the total cards distributed through the CAAS

program, 254 of them were used at least once during the pilot period according to data from the MBTA. The goal of this program is to provide economic relief for Somerville residents, while also building evidence on the impact and logistics of a potential regionally scaled means-tested fare program. This program launched in June 2023 and concluded in September 2024.

## **Key Findings**

MAPC's evaluation of the two pilots found that the free transit passes increased participants' use of public transit, while decreasing the number of trips made by car. Participants utilized public transit to go to work and find new employment opportunities, to get themselves or their children to school, to attend social and recreational activities, and to explore the city with their families. Overall, there were more than 300,000 validations (fare card taps to access the transit system or transfer between transit modes) on transit passes involved in these programs, and participants saved more than \$500,000 on transit trips.

Through surveys and focus groups, program participants shared the wide range of benefits they experienced thanks to the ability to use public transportation for free. Participants widely agreed that the transit passes had significant benefits on their finances and mental health, and that the passes led them to take more trips and access more destinations than they had been able to in the past. Across all quantitative and qualitative data collected in this program evaluation process, participants agreed that the free transit passes had significant positive impacts on their lives and that they believed the programs should be continued beyond these initial pilots. The programs successfully reached the low-income, racially diverse demographic of Somerville residents they sought to help. The program benefits also included improving equitable access to transit for Somerville residents, as well as providing additional economic opportunities for those most in need.

The sections of this report that follow provide more details on how the transit passes were used and the benefits the transit passes provided. They also outline challenges and lessons learned from the program administration and evaluation that can provide helpful guidance for the continuation of the free transit pass programs and other similar initiatives in Somerville and the Greater Boston region.

## **Overview of Evaluation Strategy**

The evaluation strategy MAPC designed for the SPS and CAAS pilots was based around five main research questions:

1. *Are the transit passes reaching the intended audience?*
2. *How much were the passes used, and why?*
3. *What are the perceived benefits for pass recipients?*
4. *Did pass recipients change their travel behavior as a result of receiving transit passes?*
5. *What are the challenges for municipal partners in administering and evaluating these programs?*

Before beginning data collection, MAPC reviewed these research questions with City staff and program administrators to confirm that they were sufficient to address the City's questions and concerns.

Once the research questions and project purpose were agreed upon, data collection began on existing conditions. The first step in the program evaluation process was to understand 1) who was participating in the program and 2) how participants were using public transit *before* participating in one of the pilots. To collect this information, MAPC worked with the City and program administrators at CAAS and SPS to create and distribute an online initial survey for participants to complete before they were given their PERQ pass. Ultimately 145 initial survey responses were received (69 from SPS program participants, 76 from CAAS program participants).

A second online concluding survey was circulated to program participants as the pilots ended, with questions that focused on the benefits participants experienced using the PERQ pass, how their travel behavior may have changed, and any challenges they experienced with the administration of the program. A \$25 gift card to Target was offered as an incentive to induce concluding survey completion. Ultimately 145 concluding survey responses were received (75 from SPS program participants, 70 from CAAS program participants).

At the City of Somerville's request, both the initial and concluding surveys were translated into the following languages: Arabic, Haitian Creole, Mandarin Chinese, Nepali, Portuguese, Punjabi, Spanish. More details about challenges with survey administration and related adjustments to MAPC's evaluation strategy are included later in this report.

Throughout the pilots, the City and MAPC requested data exports from the Office of Performance Management and Innovation (OPMI) at the MBTA. These exports included information on total validations, validations by subway line, validations on bus or bus rapid transit, and the cost of the trips for each PERQ card enrolled in the program by month. This data was analyzed by MAPC to understand patterns in transit usage by participants in each of the pilots.

To get a more complete understanding of the experience of program participants, MAPC hosted four participant focus groups during the pilots – two with SPS program participants (held on the morning and evening of October 25, 2023) and two with CAAS program participants (held on the morning and evening of March 27, 2024). These focus groups provided rich qualitative data to contextualize the data collected from the initial and concluding surveys and the card usage data shared by OPMI. Program focus group participants were provided with a \$50 gift card to Target as an honorarium in appreciation of their time. To better understand the administrative successes and challenges of the programs, MAPC also hosted two focus groups with SPS program administrators (held on the morning and afternoon of August 23, 2023) and one focus group with CAAS program administrators (held on the morning of March 13, 2024).

The findings below reflect the outcomes of MAPC's analysis of the qualitative and quantitative data described above.

# Findings

## Transit Pass Program Audiences

Information on transit pass program participants was gathered via an initial survey designed by MAPC, an intake survey designed by Somerville Public Schools that included some of the same questions as the MAPC initial survey (as such SPS program participants did not answer these questions when completing the MAPC initial survey), and a concluding survey designed by MAPC. The initial MAPC survey received 145 responses (69 from SPS program participants, 76 from CAAS program participants) and the concluding MAPC survey also received 145 responses (75 from SPS program participants, 70 from CAAS program participants). The SPS intake survey questions that overlapped with the MAPC initial survey questions received 667 unique responses from SPS program participants, excluding responses that were blank, not applicable, or repeats for individuals given replacement fare cards.

Both transit pass programs reached large groups of low-income individuals. For the 661 respondents to the SPS intake survey who reported their annual household income, 80% reported that their household income was less than \$30,000 per year, while 15% reported incomes between \$30,000 and \$50,000, and just 5% said their household income was between \$50,000 and \$75,000 annually. These results are similar to those of the 73 CAAS initial survey respondents who reported their income, with 81% making less than \$20,000 per year and 15% making \$20,000-\$39,999 per year.

These results were largely reflected in the MAPC concluding survey as well. Of the 71 SPS concluding survey respondents who indicated their household income, 49% made less than \$20,000 per year, 24% made \$20,000-\$39,999 per year, and 9% made \$40,000-\$59,999 per year. Of the 69 CAAS concluding survey respondents who indicated the same, on the other hand, 58% made less than \$20,000 per year, 15% made \$20,000-\$39,999 per year, and 10% made \$40,000-\$59,999 per year. Overall, both programs were successful in reaching their intended audiences of low-income individuals, but CAAS program participants tended to have lower household incomes than SPS program participants. Relatedly, CAAS program participants were also more likely to be unemployed than SPS program participants, with 56% of CAAS initial survey respondents (73 respondents total) indicating that zero people in their house or apartment are currently employed full-time, compared with only 24% of SPS initial survey respondents (68 respondents total) who indicated the same.

Both transit pass programs also reached racially diverse groups of participants, but again there were some differences between the two programs. Of the 613 respondents to the SPS intake survey question on race/ethnicity, an overwhelming majority (81%) were Hispanic/Latino, 8% were white, 4% were Black/African-American, and 3% were Asian. For the 73 SPS concluding survey respondents who indicated their race/ethnicity, 74% were Hispanic/Latino, 14% were white, 10% were Asian, and 4% were Black/African-American. Of the 73 CAAS initial survey respondents who indicated their race or ethnicity, on the other hand, a plurality (44%) were white, 22% were Latino, 18% were Black/African-American, and 16% were Asian. Of the 73 CAAS concluding respondents who indicated the same, 30% were white, 29% were Hispanic/Latino, 13% were Black/African-

American, and 12% were Asian. Overall the SPS program reached an overwhelmingly Hispanic/Latino population, whereas the CAAS program reached a more racially mixed population.

Finally, both transit pass programs reached individuals with low rates of car ownership who are also frequent users of public transit. Across both programs, 70% of respondents to the SPS intake/MAPC initial surveys (685 respondents total) indicated that people in their household owned or leased zero motor vehicles, and another 28% percent indicated that people in their household owned or leased one motor vehicle. The results of the concluding survey were similar, with 63% of respondents (141 respondents total) indicating that people in their household owned or leased zero motor vehicles, and another 30% indicating that people in their household owned or leased one motor vehicle.

As for public transit usage, 74% of respondents to the SPS intake/MAPC initial surveys (616 respondents total) across the two programs reported that they used public transit more than five times per week, with another 18% reporting that they used public transit three to four times per week. These results show that the transit pass programs were successful in reaching transit-dependent populations that stand to benefit the most from increased transit access.

### **Transit Pass Usage**

As noted above, the transit pass programs reached a base of participants that already used MBTA public transit relatively frequently. When asked about their expected transit use after receiving their pass, participants indicated similar usage trends to what they were already doing, with 66% of all initial survey respondents expecting to use public transit more than five times per week and another 25% expecting to use their public transit three to four times per week.

While MAPC did not have exact data on how participants used public transit before the pilots started, the MBTA OPMI data from the MBTA showed that the PERQ cards for these two pilots had more than 300,000 validations on both busses and trains (more than 46,000 for CAAS participants and nearly 262,000 for SPS participant). The median PERQ card in the CAAS program had 24 validations per month, while the median PERQ card in the SPS program had 29 validations per month. These validations equated to more than \$500,000 in transit usage for participants across the two pilots (around \$75,000 for CAAS participants and \$435,000 for SPS participants).

The program led to more transit usage, even for those who were already using transit frequently. 61% of all concluding survey respondents reported that they used their transit pass more than they had expected at the beginning of the pilot. However, there were some differences in public transit mode usage across the two programs. Of the SPS initial survey respondents who indicated their most-used mode of transportation in the past month, 58% used the bus and 20% used the subway or Green Line. Of the CAAS initial survey respondents who indicated the same, on the other hand, 45% used the bus and 36% used the subway or Green Line. Relatedly, when asked to indicate which MBTA public transit services they used more than once per month, 84% of SPS initial survey respondents used the bus, 57% used the Green Line, and 9% used commuter rail. (Respondents could select more than one service.) For CAAS initial survey respondents, on the other hand, 73%

used the bus more than once per month, 68% used the subway or Green Line, and 12% used commuter rail.

These results were largely reflected in the MAPC concluding survey as well. Of the SPS concluding survey respondents who indicated their most-used mode of transportation in the past month, 51% used the bus and 38% used the subway or Green Line. Of the CAAS concluding survey respondents who indicated the same, on the other hand, 43% used the bus and 47% used the subway or Green Line. Relatedly, when asked to indicate which MBTA public transit services they used in the past month, 83% of SPS concluding survey respondents used the bus, 57% used the Green Line, and 33% used commuter rail. (Respondents again could select more than one service.) For CAAS concluding survey respondents, on the other hand, 86% used the bus in the past month, 84% used the subway or Green line, and 23% used commuter rail. Overall SPS program participants had higher rates of bus usage, whereas CAAS program participants had higher rates of subway or Green Line usage.

## **Travel Behavior**

### *Trip Purpose*

In addition to understanding how pilot participants used their transit passes, MAPC's evaluation research also sought to understand what kind of trips the passes were being used for. Focus group participants discussed how they used the pass for essential activities like job hunting, therapy, and doctor's appointments, as well as for leisure activities like attending religious services, accessing outdoor recreation venues and sports leagues, and going to museums and aquariums, all of which they felt "elevate[d] their living experience." In open response answers, respondents to the concluding survey mentioned similar types of trips, with a focus on trips to work, bringing their children to school, and getting to medical appointments for themselves and their children. Additionally, survey respondents identified more trip purposes like participating in continuing education classes, getting to the pharmacy to pick up medication, attending social gatherings, and traveling to visit elderly family members to help with caretaking.

When participants were asked in the initial survey what types of trips they expected to use the free transit passes for, groceries/errands and employment were the most widely expected types of trips, selected by 62% and 61% of respondents, respectively. The next most common responses were health/social services (56%), education (40%), recreation/socializing (38%), and childcare/eldercare (21%). These initial expectations align closely with how respondents to the concluding survey reported having used their pass during the last month. Groceries/errands and employment were again the most widely reported types of trips, with each being selected by 66% of respondents. These results were followed by health/social services (61%), education (39%), recreation/socializing (39%), and childcare/eldercare (21%).

There were some differences in expected trips between the SPS and CAAS programs. Higher proportions of SPS initial survey respondents expected to use their MBTA passes for employment (66% for SPS, 56% for CAAS), education (47% for SPS, 33% for CAAS), and childcare/eldercare (26% for SPS, 16% for CAAS). On the other hand, higher proportions of CAAS initial survey respondents

expected to use their MBTA passes for groceries/errands (67% for CAAS, 57% for SPS), health/social services (60% for CAAS, 51% for SPS), and recreation/socializing (44% for CAAS, 32% for SPS).

The differences in types of trips between the SPS and CAAS programs were reflected in the concluding survey as well. Higher proportions of SPS concluding survey respondents reported using their MBTA passes for employment (71% for SPS, 60% for CAAS), education (52% for SPS, 26% for CAAS), and childcare/eldercare (23% for SPS, 19% for CAAS) within the past month. On the other hand, higher proportions of CAAS concluding survey respondents reported using their MBTA passes for groceries/errands (81% for CAAS, 51% for SPS), health/social services (66% for CAAS, 56% for SPS), and recreation/socializing (51% for CAAS, 23% for SPS).

While SPS survey respondents overall reported higher actual and expected usage of the transit passes for employment purposes than CAAS participants, during the focus groups SPS participants talked most about how the passes had allowed them to take more leisure trips and get themselves and their children to necessary medical appointments. Participants also discussed how they are now able to get themselves and their children to therapy and doctor's appointments that they used to miss due to lack of transit options. Parents and guardians shared that the passes have also allowed them to take their kids to local parks and pools for outdoor recreation and to learning experiences like local museums and aquariums.

#### *Increased Transit Trips, Reduced Car Trips, and Taking More Trips Overall*

As discussed earlier in this report, more than half of respondents to the concluding survey said they used their transit pass more than they had initially expected during the pilot. Additionally, 81% of respondents across the two pilots said the pass enabled them to take more trips than they had before the pilot began and that they were able to take trips they previously would not have taken.

The ability to take additional trips was a common theme across the four participant focus groups. Participants felt that they were “more mobile” and had “more freedom” due to the free transit passes that provided them “with transit flexibility they couldn’t otherwise afford.” This was especially true for those participants and members of their households who don’t have their driver’s licenses, live in one-car or zero-car households, or have mobility challenges that prevented them from getting around before public transit became a free option for them. As one focus group participant put it, “not having a second vehicle is no longer a restriction” to travelling around the region. Overall, participants agreed that removing money as a barrier to public transit use greatly expanded their ability to access destinations across the region and increased the number of trips they were taking in their daily lives.

Some program participants enjoyed biking as a mode of transportation, but shared that having free access to public transit gave them an alternative when they were too tired to bike or when a particular route felt unsafe to bike. Many participants found public transit to be a lower stress and “easier to use” alternative for trips that they previously used a car for. Survey respondents discussed how expensive car ownership is and how using public transit as an alternative allowed them to avoid sitting in traffic, as well as the often stressful and expensive experience of trying to park during trips downtown.

The increased usage of public transit was mirrored by a reduction in car travel, with 76% of concluding survey respondents across both programs reporting that their MBTA transit pass enabled them to take fewer car trips (driving, rideshare, taxi) than before the programs began. This aligns with the expectations reported in the initial survey, where 78% of respondents reported that they either expected to drive less once they received the transit pass or that their household did not own a motor vehicle (33% and 45%, respectively). Of the 30 initial survey respondents who said they did not expect to drive less, 11 of them indicated in a separate question that there were no motor vehicles owned or leased by members of their household. While this doesn't mean those respondents never drove – some focus group participants shared that before receiving their transit passes, they would borrow cars from friends or family for certain trips – these individuals may have only been driving infrequently, if they drove at all.

While many concluding survey respondents similarly may not have been driving much to begin with (63% reported that people in their household do not own or lease zero motor vehicles), the overall concluding survey data indicate that the transit pass programs have had a mode shift impact by reducing car trips and increasing transit trips – both for work and school commutes and recreational and other discretionary trips. Some concluding survey respondents also mentioned the benefits that taking fewer car trips has on their community at large, including “reducing the need for parking which can free up land for other uses,” “reducing motor vehicle-related injuries and fatalities, and reducing transportation’s contribution to air pollution,” and “reduc[ing] congestion in towns and cities.”

## **Benefits to Participants**

### *Economic Benefits*

In addition to encouraging more frequent use of public transit and increased transportation access overall, the transit pass programs have also provided significant economic benefits to participants. Across both programs, 24% of concluding survey respondents reported that the transit pass saved them more than \$100 per month, 31% reported savings of \$75-\$100 per month, 17% reported savings of \$50-\$75 per month, and 15% reported savings of \$25-\$50 per month.

Not only is this level of financial savings significant to the program participants, but it also shows the inequitable burden transit costs can place on low-income individuals. Monthly unlimited MBTA transit passes only cost \$90, yet nearly a quarter of concluding survey respondents (34 participants) reported that the transit passes saved them more than \$100 per month. While some of these savings may have been from fewer rideshare trips or reduced gas costs, it is likely that some individuals were spending more than \$100 on public transit alone. During the SPS parent and guardian focus groups, participants shared that they were spending \$30 a week on transportation or paying \$2 in cash each time they had to take the bus. For some low-income individuals, paying \$90 all at once for a monthly pass is not possible within their budget, but paying by week or by ride can result in these individuals paying more than \$90 throughout the course of the month. The MBTA's new automated fare collection system may relieve some of this burden, as bus riders can now use a credit card to pay the correct \$1.70 fare for their trip, rather than paying \$2 in cash because they do not have exact change.

When asked how much they spent on transportation in the last month (including car insurance, gas, ride shares, and commuter rail trips), 29% of concluding survey respondents reported spending less than \$50, 24% spent between \$50 and \$99, 9% spent between \$100 and \$149, and 14% reported spending more than \$150. (Another 24% of concluding survey respondents reported not knowing how much they spent on transportation in the last month.) Initial survey respondents were not asked about their overall transportation costs in the past month, but rather their spending on their most used mode of transportation in the last month. Despite being asked about spending on just one mode of transportation rather than all transportation spending, the initial survey respondents reported notably higher spending. Just 19% of initial survey respondents reported spending less than \$50 a month on their most used mode of transportation, while 50% spent between \$50 and \$99, 18% spent between \$100 and \$149, and 13% spent more than \$150.

The increase in the proportion of respondents spending less than \$50 per month from the initial survey to the concluding survey (19% vs. 29%), combined with the decrease in the proportion of respondents spending \$100 or more per month from the initial survey to the concluding survey (31% vs. 23%), indicate that the transit passes reduced household transportation costs for program participants – the vast majority of whom are primarily public transit users. In addition, the participants credited the transit passes with covering transfer fees when buses break down or experience mechanical issues, resulting in further financial savings.

Through focus groups and open responses to the concluding survey, many participants noted the transformative impact these savings and the transit pass programs more broadly have had on their lives. Economic relief was by far the most common benefit mentioned by concluding survey respondents in both programs. Focus group participants also shared their experiences of economic benefits from the transit passes, with one participant calling the program a “financial life-saver.” They went on to say that “without this support and additional social services (EBT funding), my expenses would be too high and I would be priced out of Somerville.” Across all the qualitative data collected, participants highlighted how the transit pass has been an immense financial help that has allowed them to save money each month. These savings were used for a wide range of necessities such as buying more food for their families, purchasing clothes and school supplies for their children, paying down debts, and recurring expenses like rent and utilities. Additionally, these savings allowed some participants and their families to enjoy more leisure activities such as visits to the library or aquarium, buying tickets to a Red Sox game, or saving money towards a vacation.

MBTA PERQ card usage data, using March 2024 as a test month, further illustrate these financial savings. In March 2024 the median PERQ card in the CAAS program had a use value of \$43.20 and for SPS it was \$50.40. For some participants the use values were even higher; one CAAS participant had more than \$200 per month in transit usage for seven months of the pilot and more than \$100 per month in the other four months they had the card. There were several SPS participants with similar use values, including two participants who had more than \$400 in transit usage some months. Throughout the pilot period, the median use value for the SPS PERQ cards was higher than that for the CAAS PERQ cards. The use value figures reflect not only how much participants were spending on transportation before the pilot programs, but also increases in transit trips taken when money was no longer a barrier to travel.

### *Mental Health Benefits*

Both participants in the SPS and CAAS programs credited the transit pass with giving them peace of mind, due to being able to move around with less worry. One participant vocalized that the “freedom it gives you is also important to note; free reign of the T system without having to worry about price and free mobility is an incredible thing.” By removing the financial barrier to traveling around the region, program participants were able to spend more time experiencing different events and attractions in the region, rather than worrying about if they had reloaded their transit pass or if they had enough money to take a certain trip.

Several participants shared that they felt their depression, anxiety, or social isolation improved due to having the free transit passes. These individuals shared that the ability to travel around the region for free encouraged them to leave their home more, allowed them to attend various classes which gave them more opportunities to socialize, and that the reduced stress and cost savings of the pass helped them better control their anxiety throughout the day. One participant shared that they no longer felt isolated the way they had for the past several years and that their mental health had improved overall thanks to the opportunities provided by the transit pass. In the same vein, some participants shared that they were worried the program ending would have a negative impact on their mental health.

The ability to take fewer car trips due to the transit passes also had a positive impact on participants’ mental health. Many participants discussed how sitting in traffic, having to find parking, and the general danger that can come with driving in the city caused them significant stress. Participants reported that being able to take transit as a free alternative to driving “reduced stress,” “took some of the fear out of traveling,” and allowed them to use their commute time to get a head start on work or just take some time to relax.

#### *Other Benefits*

Another benefit that specifically came up in the participant focus groups across both programs was the time savings. Using the transit pass allowed participants to save time when they might have previously walked to their destinations. Some participants also reported transit being a faster alternative to certain high-traffic car trips. Participants with children also found transit to be a faster alternative to get their families to various destinations, with one participant sharing that “with three kids it is hard to walk even one stop away and hard to get everyone in and out of a car so having the pass made life so much easier.” Overall, participants shared that the transit pass allowed them to “have more control over what they do with their time.”

Having an alternative to walking provided benefits to participants beyond time savings as well. Participants reported that it was easier for them to do errands like grocery shopping when they did not have to walk home with heavy bags. Others shared that they were able to “be more independent” as they could now make trips on their own that they previously weren’t able to before, like getting to the laundromat or going to the store for household necessities. Additionally, the passes provided an alternative mode of transportation when the weather was bad so participants could still get around without having to walk or bike on days when it was raining or too cold to be outside.

While participants who did not drive enjoyed the ability to walk less due to the free transit pass, for those who did drive to many destinations before receiving their pass, taking public transit likely increased the amount of time they spent walking. Some participants noted that they believed the increased physical activity level that came with taking public transit was better for their health.

Another benefit participants discussed was the larger social good they felt they were contributing to by taking public transit rather than traveling by car. Community benefits mentioned included less traffic congestion in and around their neighborhoods, reduced air pollution and increased energy efficiency, and improved safety for themselves and others due to fewer cars being on the road.

### **Lessons Learned on Program Administration**

Enrolling in the transit pass programs was an easy experience for the vast majority of program participants surveyed. When asked if they agreed with the statement “Signing up for my MBTA public transit pass program was easy,” 74% of initial survey respondents across both programs indicated that they strongly agreed, and an additional 21% indicated that they somewhat agreed. Additional data from the concluding survey, as well as focus groups conducted with SPS program administrators, SPS program participants, CAAS program administrators, and CAAS program participants, highlighted additional benefits and positive aspects of the transit pass programs, while also identifying challenges and opportunities for future improvement.

SPS and CAAS program administrators highlighted that their close working relationships and clear communications with the City of Somerville made the transit pass programs easy to administer. They also noted the importance of having dedicated staff to help participants navigate the transit pass programs, as well as the importance of having the program materials translated into different languages to make the programs accessible to participants with diverse language needs. Both SPS and CAAS program administrators reported that transit pass program participants experienced significant travel and economic benefits, including the following:

- Increased access to job opportunities and medical appointments
- The ability to take more transit trips than before (including increased access to the new Green Line Extension)
- Increased mobility to all destinations without having to worry about cost
- Decreased car trips for commuting parents and improved commutes overall
- Saving money to ease the burden on other expenses like housing
- The ability to repurpose funds for other household needs

SPS and CAAS program administrators did report some participant confusion around the transit pass programs. Some SPS program participants were initially unclear about the difference between the new transit pass program for parents/guardians (passes were provided by the City) and the existing M7 transit pass program for public school students in grades 7-12 (passes were provided by SPS), as well as whom to contact regarding complications with their pass (the City or SPS). Similarly, some seniors who approached CAAS about the low-income transit pass program were instead directed to the MBTA’s existing discounted pass for seniors, so that the CAAS program could remain available for those who were truly low-income and had no other options for support.

SPS and CAAS program administrators were able to resolve these issues around program eligibility and access by communicating the appropriate program resources to participants. There was also some initial confusion about whether the transit pass programs would provide more than one pass per household. SPS and CAAS program administrators confirmed that updating the programs to allow two passes per household reduced participant stress and further enhanced the programs' benefits.

#### Opportunities to Increase Survey Completion and Program Accessibility

As the transit pass programs launched, initial data gathering via MAPC's initial survey proved more challenging than anticipated, as only 145 individuals total submitted responses (69 from SPS program participants, 76 from CAAS program participants). SPS program participants were not required to complete the initial survey when the program launched, which likely contributed to the low rate of survey completion. When the initial survey was made a requirement later in the SPS program, SPS program administrators expressed concern that making the survey mandatory could preclude people from signing up for the program and receiving their transit passes. Ultimately most SPS program participants did not complete the initial survey even after it was technically made mandatory, highlighting a tension between efforts to extend transit benefit programs to as many people as possible and efforts to evaluate the impact of those benefit programs.

SPS program administrators highlighted several other issues with respect to the initial survey and program accessibility. They noted that some SPS program participants were concerned that completing the survey could affect their immigration status, and/or faced literacy, language, or technological barriers around their ability to comprehend or complete the survey. They also noted that some SPS parents and guardians (sometimes the same ones who are concerned about their immigration status) require a fair amount of handholding and prefer to complete surveys in the presence of a trusted program administrator for reassurance (rather than over email). Additionally, they said that SPS parents and guardians receive many surveys in general, which can lead to survey fatigue. SPS program administrators' suggestions to improve survey accessibility and completion, and to increase transit pass program accessibility and enrollment more broadly, included the following:

- Brand the survey as part of a distinct program so that it does not get lost in a sea of other emails.
- Include survey disclaimers that completing the survey will not affect one's immigration status and that their responses will be kept completely confidential.
- Provide short audio/video clips, translated into multiple languages, that do the following:
  - Provide a brief explainer of the transit pass program
  - Reassure participants that their immigration status will not be affected by completing the survey and that their responses will be kept completely confidential
  - Highlight the importance of completing the survey with respect to gathering valuable program information and helping to extend the program in the future
  - Address potential literacy challenges
- Explore opportunities to have initial communication about the program be multilingual, as opposed to starting in English and then having to switch language preferences.

- Use word of mouth from SPS parents and guardians who have successfully enrolled in the transit pass program to confirm the safety, purpose, and reliability of the program to other potential participants.

In contrast to SPS program participants, CAAS program participants were technically required to complete the initial survey from the very beginning of the program, and as such they completed the survey at much higher rates than SPS program participants. Many CAAS program participants completed the survey in person at the CAAS office as part of their appointments to receive their public transit passes. However, even with this system in place – consistent with CAAS’ track record of administering other low-income benefit programs – most CAAS program participants still did not complete the initial survey. Similar to SPS program administrators, CAAS program administrators suggested that highlighting the importance of completing the survey with respect to program sustainability could help improve survey uptick in the future.

Qualitative data collected from both the SPS and CAAS participant focus groups highlighted several challenges based on technology gaps, survey functionality, and communication around the transit passes, as well as recommendations to improve the processes that support the program.

Participant comments and suggestions included the following:

- Both CAAS and SPS participants suggested different survey instruments (e.g. paper surveys) for those struggling with access to a computer and adapting to technology barriers, especially those struggling with Zoom and email.
- Several SPS participants experienced glitches with the online surveys based on their ID, code, or card number that prevented them from being able to advance and complete the surveys.
- CAAS participants experienced a high level of communication from case workers depending on who they worked with. Some participants expressed that the process was difficult and they experienced “gaps in hearing out,” while others described the process as “smooth and really easy” and noted a very positive experience.
- CAAS participants noted confusion about transit pass program eligibility outside of existing low-income benefit program participation (e.g. SNAP, MassHealth) and requested clearer communication about the number of transit passes available and general program availability.

## **Survey and Data Administration Challenges**

### *Survey Administration Challenges*

While transit pass program participants and administrators alike largely reported positive experiences through focus groups and surveys, the administration of the surveys themselves presented several challenges that prompted adjustments to MAPC’s evaluation strategy. As mentioned earlier in this report, the response to MAPC’s initial survey was lower than anticipated, with only 145 total responses across both programs (69 from SPS program participants, 76 from CAAS program participants).

MAPC initially planned to administer brief ongoing surveys via email/text every one to two months to initial survey respondents to gather additional information about their travel behavior and their experiences with the transit pass programs. MAPC asked initial survey respondents about their willingness to receive these ongoing surveys, while also providing an incentive by noting that completing these surveys would enable them to receive gift cards and other prizes. While 79% of initial survey respondents indicated their willingness to receive short additional surveys, the low overall response rate to the initial survey led MAPC to abandon its plans to conduct these ongoing surveys, and to instead save resources to provide a more generous incentive for completion of the more substantial concluding survey. As noted in the previous section of this report, SPS and CAAS program administrators and participants offered several recommendations that could help increase survey completion for future program evaluations.

Redundancies across survey instruments and discrepancies across data platforms presented additional challenges to MAPC's evaluation strategy. The SPS program utilized an intake survey that included some of the same questions as the MAPC initial survey, and as such SPS program participants did not answer these questions when completing the MAPC initial survey. MAPC initially planned to join the responses to the overlapping SPS intake survey questions with its own initial survey, but differences in how the survey data was recorded and stored across MAPC and SPS data platforms precluded this from happening. Instead, MAPC had to manually enter the aggregated SPS intake survey data, without being able to attach that data to individual initial survey responses.

#### *Data Administration Challenges*

It was also MAPC's original intent to join data from the SPS intake/MAPC initial surveys with data from the ongoing and concluding surveys, as well as transit pass usage data from the MBTA. By using each participant's unique MBTA PERQ card number to facilitate the joining process, MAPC would have been able to directly compare the initial, ongoing, and concluding survey responses for individual program participants, along with their transit usage profiles. (At no point during this process would MAPC have identified or shared the names of specific individuals participating in the transit pass programs.) However, this joining process was also precluded by differences in how PERQ card data was recorded and stored across MAPC, SPS, CAAS, and MBTA data platforms, and as a result comparisons across time at the individual participant level were not possible for the final evaluation. Creating uniform survey instruments and common data frameworks across program stakeholders would help address these issues in the future.

MAPC also made several additional changes to the original evaluation methodology due to what PERQ card data the MBTA was and was not able to share. As mentioned above, MAPC was unable to link data from an individual's PERQ card to that participant's survey results, as the MBTA would only share anonymized data. To address this, MAPC had originally planned to create user groups of around 25 participants with similar characteristics (whether that be demographic traits, travel patterns or purpose, or some other trait measured in the initial survey). Due to the limited number of responses to the initial survey, MAPC did not follow through with this plan and the usage data from the MBTA was grouped only by which pilot program the PERQ card was distributed through (SPS or CAAS).

Staff turnover at the City of Somerville, at MAPC, and within the MBTA's Office of Performance Management and Innovation (OPMI) – which was responsible for aggregating and sharing the PERQ card data – also contributed to inconsistencies in the PERQ card usage data acquired for this analysis. Small changes to field names in the data required edits to the scripts written for this analysis when new data came in. In addition, OPMI updated its process for aggregating and sharing PERQ card data before the final data request for this analysis was made. While a longer lead time for data sharing was expected because of this new process, the new data exports were also inconsistent with what had been shared previously due to discrepancies in the new process. To minimize delays for future program evaluation that requires PERQ card data from the MBTA, and to create more standardized data sharing overall, the City should consider:

- Agreeing on a specific data format, including standard field names, with the OPMI team for all requested data pulls before the first data export.
- Outlining a schedule for expected data requests at the beginning of the project and sharing that schedule with the OPMI team so they know what to expect.
- Clarifying how long OPMI needs to complete a data request and setting expectations for analysis based on this information.

## Conclusion

MAPC's evaluation of Somerville's low-income transit pass programs found that the programs are providing significant benefits to participants with respect to increased transportation access and trips, as well as economic savings and flexibility. MAPC's evaluation also found that close coordination between program stakeholders and administrators, as well as outward-facing administrative staff who directly interface with program participants, are critical to the success of discounted transit pass programs. Ensuring language access as part of these programs is another important consideration to ensure equity of access and overall program success.

MAPC's experience evaluating the Somerville low-income transit pass programs highlights opportunities to make future evaluations of similar programs even more robust through improved survey practices and data standardization. The lessons learned from MAPC's evaluation will be useful for the MBTA, Action for Boston Community Development (ABCD), and the Massachusetts Association for Community Action (MASSCAP) as they now move forward with implementing and administering a system-wide low-income fare program for the MBTA.