

# ALAMEDA-CONTRA COSTA TRANSIT DISTRICT



## STAFF REPORT

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**MEETING DATE:** 8/6/2025

**Staff Report No. 25-384**

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**TO:** AC Transit Board of Directors  
**FROM:** Salvador Llamas, General Manager/Chief Executive Officer  
**SUBJECT:** Update on AC Transit's EasyPass program

### BRIEFING ITEM

**AGENDA PLANNING REQUEST:** ☐

**RECOMMENDED ACTION(S):**

Consider receiving an update on the District's EasyPass program.

Staff Contact:

Claudia Burgos, Interim Executive Director of External Affairs, Marketing & Communications

**STRATEGIC IMPORTANCE:**

Goal - Strong Public and Policymaker Support

Initiative - Financial Efficiency and Revenue Maximization

The EasyPass program meets a community need for service area institutions to offer bulk transit passes to their constituents in an effort to increase ridership and afford the District forecasted annual fare revenue.

**BUDGETARY/FISCAL IMPACT:**

There is no fiscal impact associated with this briefing item report.

**BACKGROUND/RATIONALE:**

The AC Transit EasyPass program has long played a vital role in increasing District ridership and encouraging a modal shift to public transit. The roots of the EasyPass program can be traced back to AC Transit's first universal pass program which began in 1999. Today, the EasyPass program offers employers, residential communities and Colleges/Universities the ability to buy annual passes for a defined pool of participants at a reduced rate. This report will cover the status of the program in fiscal year 2025 (FY25) and the developments that have taken place over this time.

**Current Program Status**

Currently the program is comprised of 48 total active clients with an eligible participation pool (eligible EasyPass card holders, also referred to as participants) of 99,081. The program ended FY25 with an estimated annual contract value of \$9.1 million. Participants took 4.7 million trips with their passes this year. Although active clients have slightly decreased since the last Board update, the program has experienced growth across the other key performance metrics (KPMs) during FY25, including a significant increase in trips. All updated

KPMs compared to FY24 are provided below:

- Participant Trips: 40% increase
  - + 1.3M trips
- Eligible Participants: 22% increase
  - + 17,981 eligible participants
- Estimated Annual Contract Value: 14% increase
  - + \$1M in estimated annual contract value
- Active Clients: 4% decrease
  - - 2 clients

The reduction in clients can be attributed to affordable housing developers canceling their participation due to funding challenges, most notably East Bay Asian Local Development Corporation (EBALDC). Participant and revenue growth can be credited to key client renewals throughout FY25 and the addition of California State University, East Bay (CSU East Bay) in June 2025. The most significant increase, participant trips, is due to the continued growth in ridership of our largest active clients, including UC Berkeley, and the efforts of staff working directly with all active clients to improve their program effectiveness.

Attachment 1 illustrates KPMs for Participant Trips, Eligible Participants, Estimated Annual Contract Value and Active Clients for the period of FY22-FY25. A full list of active clients can be found on Attachment 2, showing each active client's city, participant pool count, management group, and ward location.

### **Program Management**

As stated in Board Policy 334, the primary goal of the EasyPass program is to increase ridership for the District by encouraging a modal shift from single-occupancy vehicles to public transit, creating life-long public transportation users and advocates. To address this primary goal, staff identified three key areas of focus to maximize ridership:

1. Prioritization of retaining active clients while concentrating client acquisition on leads that will make the highest impact
2. Increasing ridership through the existing pool of eligible participants with streamlined marketing tactics
3. Ensuring the successful and smooth transition of the EasyPass lead staff member to minimize impacts to active clients

Program management for these goals and the identified areas of focus are split into three categories: Lead Generation & Contracts, Marketing, and Program Administration & Client Support.

#### *Lead Generation & Contracts*

The EasyPass program welcomed seven new clients over the last fiscal year, including notable additions CSU East Bay and Alameda Landing (a mix of residential and business locations on the west-end of Alameda). These new clients account for an additional 13,639 eligible participants and over \$1.2M in additional annual contract value. Furthermore, four active client contracts were renewed, including the Peralta Community College District through their successful student referendum and San Francisco Bay University in Fremont. Through these additions and renewals, EasyPass now has five local College/University active clients: UC Berkeley, CSU East Bay, Peralta Community Colleges District, Northeastern University (formerly Mills College) and San

Francisco Bay University.

These client renewals and acquisitions have been prioritized over the implementation of a larger lead generation program. However, as time permits, staff dedicate time to tracking new residential property developments, responding to lead inquiries through the website/referrals, and focusing on leads that will have the greatest impact on the program's key performance metrics. Local College/University active clients account for a large percentage of both contract value and participant pool size for the program, as illustrated in charts 1 and 2 of Attachment 3. Charts 4 and 5 further illustrate this impact, with the top 3 active clients for contract value and participant pool size being in the College/University category. Therefore, during the past fiscal year, staff prioritized meetings with representatives from Ohlone College, Chabot College, and Samuel Merritt University to share information about the program and gauge interest.

### *Marketing*

The transition to a new EasyPass lead offered the District an opportunity to execute a re-engagement strategy and top-to-bottom client review. Staff began by re-engaging every active client to accomplish the following: establishing a relationship with the new program lead, receiving feedback from clients on their program to identify areas of improvement, answering questions, updating site coordinator contact information, and providing marketing resources or scheduling individual training sessions. As this re-engagement strategy was taking place, ridership data was analyzed at the client level to identify opportunities for growth with our existing eligible participant pool and to monitor the effectiveness of these strategies. To support this, site coordinator training processes and materials were overhauled, marketing material content has been regularly refreshed. Attachment 4 is an example of a new marketing flyer developed this year. Additionally, a bi-monthly email newsletter from District staff to site coordinators was established to share important information, remind them of where to find promotional materials, and to keep the EasyPass program top of mind.

To further aid retention and ridership, a substantial effort was made to increase staff presence at in-person events for active clients. These events are essential to strengthening the program's relationships with clients and eligible participants to answer questions, promote AC Transit service, and ultimately increase ridership and retention.

12 events were attended by staff:

- **College/University events:** Northeastern Oakland (Move-in Day), UC Berkeley (Caltopia & Spring Forum), Peralta Community College District (referendum promotions at Laney, Alameda, Berkeley City and Meritt Colleges), San Francisco Bay University (Spring Move-in Day)
- **Residential Community events:** Lions Creek Crossing (National Night Out); Hana Gardens, Miraflores (Seniors Informational Day); Harrison Menlo (Training), Alameda TMA (Bike to work day)
- **Employer events:** City of Berkeley (Benefits Day), Stanford Research Park (Earth Day)

The focus on re-engagement, ridership analysis, in-person event participation and other marketing efforts contributed to the 40% increase in ridership through FY25. Event participation and regular client engagement will continue into the new fiscal year, and further growth in ridership is anticipated with the additions of Alameda Landing and CSU East Bay (launching Fall 2025).

In spring 2025, UC Berkeley students voted to pass a referendum to add BayPass to the existing EasyPass and

Bear Transit Pass programs. Staff are working with representatives from the Metropolitan Transportation Commission (MTC) and the UC Berkeley Transportation team on how the program will be administered and marketed to students. The impact on AC Transit ridership remains unclear, and staff will continue to monitor ridership reports regularly.

#### *Program Administration & Client Support*

Staff addressed several comments and questions shared by Board Members during the last staff report (SR 24-252) related to program administration. This includes reporting on EasyPass annually, modifying the Level of Transit Service (LTS) pricing quote sheet to more clearly outline the savings clients receive through the program's discounted pricing compared to AC Transit's traditional adult passes (changes reflected in red on Attachment 5), and reporting both ward location and management groups for clients and locations when applicable, in the EasyPass Customer Relationship Manager (CRM) system.

Administrative responsibilities and client support take up a considerable amount of the program lead's time. Examples of these tasks include site coordinator training sessions, producing client ridership reports, invoice support, client on-boarding management, and general client communication. Attention from the Marketing team to manage these tasks were key to the successful transition of the lead role. During this time, disruptions in service and support were avoided resulting in the program retaining active clients through this process. Achieving this successful transition would not be possible without the support of other departments within the District, including Customer Service, Legal, and Finance.

#### **Current Staffing**

There are two full-time staff members vital to the EasyPass Program - one Senior Marketing Representative, the lead role for all client-facing/administration/promotional tasks and one Customer Service Program Specialist responsible for card production/management tasks for all Clipper Institutional Pass Programs (EasyPass, Alameda County Student Transit Pass Program, and City of Alameda Free Bus Pass Program). Additional Marketing staff supporting the program include the Manager, Administrator, and additional Senior Representative.

A high-level overview of tasks and responsibilities that are required to keep the program running, by role, are provided in the following tables:

#### ***Senior Marketing Representative Responsibilities (EasyPass Lead Role):***

Category	Related Tasks	% of Time
Lead Generation	Networking and partnerships, internal referrals, cold outreach, external inquiries, new development tracking, and proactive marketing such as social, web, advertising, presentations	5%
Contracts	Negotiating contract terms, drafting contracts, reviewing contracts, legal team coordination, managing contract execution, monitoring compliance, expediting, amendments, price quoting, Docusign administration	25%

Marketing	Content creation, website optimization, printing materials and distribution, client field events, campaigns, newsletter, promotional items, external presentations	20%
Program Administration	Site coordinator training, participant registrations, client communications, invoice coordination (w/ Treasury), client optimization, Wrike project maintenance, CRM maintenance, ridership reports, internal reporting, participant pool reconciling	35%
Client Support	Client inquiries, process account updates, invoice disputes, client feedback, client onboardings, troubleshoot program issues, college referendum support	15%

***Customer Service Program Specialist (Card Production for Clipper Institutional Pass Programs):***

Category	Related Tasks	% of Time
EasyPass Applications and New Card Production	Formstack reviewing applications, internal data imports, card upload and activations through Clipper system, customize cards, card printing and shipping, loading BayPass cards for UC Berkeley. Production volume increases by 100% during the Fall Semester with college programs. *Nov - July: up to 3,000 cards produced **August - October: up to 6,000 cards produced	*20% **45%
Pay-per-ride Applications and New Card Registration	Formstack reviewing applications, data import, card registration and shipping. Production volume increases by 100% during the Fall Semester with college programs and pay-per-ride programs: Alameda County STPP (Student Transit Pass Program) and City of Alameda Free Bus Pass Program. *Nov - July: up to 6,000 cards produced **August - October: up to 8,000 cards produced	*40% **80%
Existing Card Management	General troubleshooting, shipping replacement cards, Issues with individual card replacements (up to 50 card replacements a week). Can take anywhere from a half a day to a full day (especially as replacements are from different programs)	15%
Program Administration	Database and card reconciliation ATMA, all 5 colleges, pay-per-ride & EasyPass card inventory, equipment upkeep/management, paper pass distribution to clients *Nov - July **August - October	*25% *45%
Client Support	Daily monitoring of customer service inquiries and questions, supporting EasyPass lead with issues, general STPP coordination	10%

**Challenges to Expansion and the Path Forward**

There has been significant growth in ridership and staff effort on program optimization over the last two years; however, the growing list of program management tasks and responsibilities will continue to impact the program's growth. With temporary staffing support during the previous fiscal year assisting with EasyPass client-facing related tasks and back-end card-production support for Clipper institutional pass programs (i.e. EasyPass, Alameda County Student Transit Pass Program, and City of Alameda Free Bus Pass Program), the program was able to maintain active clients, increase program ridership, and add several new clients, most notably CSU East Bay. As District temporary positions are minimized for the current fiscal year, staff have prioritized executing only the most essential and critical EasyPass/institutional pass program tasks for active

client retention and increasing ridership among those active clients.

Given the District's financial constraints, staff are exploring various options to provide additional resources for maintaining active clients and responding to program expansion opportunities. These include:

- Liaising with the Human Resources and Legal departments to identify any internal staffing support that may be available to assist with card processing and client outreach support, including modified duty employees.
- Reaching out to the Grants team to identify potential ridership-focused funding options that can be leveraged by the institutional pass programs for additional resources.
- Continuing to survey other transit agencies with institutional pass programs to identify new opportunities for streamlining program tasks and best practices.
- Reviewing technology and software solutions that might increase program efficiency and effectiveness in pass production, client and participant customer service support, and program marketing
- Discussing potential opportunities with MTC for sharing resources for BayPass pilot program administration.

Even with these challenges, staff will continue to identify opportunities to streamline internal processes, further active client retention efforts, respond to leads through referrals and the website, prioritize local College/University leads, and work with local cities to identify opportunities for more expansive growth with the expectation that resource support needed for continued program growth will be identified.

#### **ADVANTAGES/DISADVANTAGES:**

The advantage to growing the EasyPass program is to increase ridership for the District.

#### **ALTERNATIVES ANALYSIS:**

If additional staff resources are allocated to the institutional pass programs, EasyPass expansion efforts can become a greater focus. Increased capacity would allow more time for outbound lead development, promotional activities, client support, exploring partnerships with cities and developers, and researching alternative pricing models. For the program's card production needs, additional resources would bolster the card management and production capacity as well as increase customer card resolution capacity.

#### **PRIOR RELEVANT BOARD ACTION/POLICIES:**

- Staff Report 24-252 - AC Transit EasyPass Update
- Staff Report 22-201 - EasyPass Program Update
- Board Policy 334 - EasyPass: Goals & Methodology

#### **ATTACHMENTS:**

1. EasyPass Key Performance Metric Charts FY22-FY25
2. EasyPass Active Client List FY25
3. EasyPass Customer Relationship Manager Dashboard
4. EasyPass Marketing Flyer Example
5. EasyPass Level of Transit Service Pricing Quote Example

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