

# Metro's 2023 Evaluation Report for Income-Based Fares

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June 28, 2024



**King County**

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## I. Executive Summary

In October 2020, King County Metro Transit (Metro) and multiple partner agencies launched the [subsidized annual pass](#). Developed to serve the needs of people with no and very low incomes, it provides another option for those who cannot afford Metro's existing [ORCA LIFT discounted low-income fare](#). Eligible residents can enroll through Washington State Department of Social and Health Services (DSHS), Public Health – Seattle & King County (Public Health), or Catholic Community Services to receive an annual pass that allows them unlimited access to transit without paying a fare. To be eligible, people must meet three criteria:

1. Income at or below 80 percent of the federal poverty level<sup>1</sup>
2. Enrollment in specific benefit programs – currently limited to six, administered by DSHS, with income qualifications at or below 80 percent of the federal poverty level<sup>2</sup>
3. Reside in King, Pierce, or Snohomish County

By employing an income-based approach that ensures discounts are provided to those who cannot afford to pay full fare, the program is in line with King County's [2021-2031 Strategic Plan for Public Transportation](#).<sup>3</sup>

In approving the program, the King County Council added a requirement for a program evaluation plan in 2020 and annual evaluation reports in years 2021-2024.<sup>4, 5, 6</sup> This report is the evaluation report for calendar year 2023 and includes progress toward measures listed in section B.1.a. through g. of the amendment to Motion 15600. Key findings include:

- Metro launched the subsidized annual pass during the COVID-19 pandemic. This program relies on the regional human service network; pandemic-related disruptions affecting the network's operations eased somewhat in 2023, with additional changes expected in 2024 that will put operations back to pre-COVID levels.
- As compared to the previous reporting year, metrics related to enrollment, ridership, and operational costs were stable in 2023.
- In 2023, 12,642 people enrolled in or renewed the subsidized annual pass. Enrollees speak 22 different primary languages, and 36 percent of enrollees speak a primary language other than English.
- Enrollees took 3.3 million trips using the pass in 2023. Most trips were taken on Metro (81 percent, mostly by bus) and represent three percent of King County Metro's boardings.

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<sup>1</sup> Approximately \$21,000 for a family of four.

<sup>2</sup> Temporary Assistance for Needy Families (TANF)/State Family Assistance (SFA), Refugee Cash Assistance (RCA), Aged, Blind, or Disabled Cash Assistance (ABD), Pregnant Women Assistance (PWA), Supplemental Security Income (SSI), Housing & Essential Needs (HEN).

<sup>3</sup> [King County Motion 16049](#).

<sup>4</sup> [King County Motion 15600](#).

<sup>5</sup> [Amended King County Ordinance 17757, Ordinance 19058](#).

<sup>6</sup> King County Metro Transit, [Metro's evaluation plan for income-based fares](#), September 11, 2020; King County Metro Transit, [Metro's 2020 evaluation report for income-based fares](#), June 30, 2021; King County Metro Transit, [Metro's 2021 evaluation report for income-based fares](#), June 30, 2022; [King County Metro Transit, Metro's 2022 evaluation report for income-based fares](#), June 30, 2023.

- The total operating cost for 2023 was \$1,100,000. This total does not include the value of the fare subsidy or in-kind support provided by partner agencies.

This program is a large-scale fully subsidized pass program that serves people who are qualified for an income-based fare discount. A pass program is distinct from an income-based discounted fare such as ORCA LIFT because it requires significant administration to manage cards on behalf of individuals. Since this program serves a high-need population, it also requires a great deal of specialized and direct customer service. These impacts remained stable in 2023.

- At Metro, the primary impact on transit operations continues to be related to direct customer service and is predominantly experienced by the Customer Service Coordinator team assigned to support the program. These staff members manage passes via Metro’s business account and provide customer service to enrollees and partner agencies. The complexity of technical issues and customer interactions vary greatly, and many customers require lengthy, specialized support.
- In 2023, Everett Transit joined the program on a pilot basis. As a result, enrolled customers can ride on services provided by Everett Transit, Sound Transit, Seattle Department of Transportation (Seattle Streetcar), and Seattle Center Department (Monorail). Access to an integrated and extensive transit network is valuable for riders.
- Staff at DSHS, Public Health, and Catholic Community Services lead outreach, customer enrollment, and customer communication. Staff at the enrollment agencies interact regularly with the Metro Customer Service Coordinator team to confirm issues related to eligibility, enrollment, and renewals. In 2023, Public Health processed the most enrollments.

Metro’s evaluation plan, supported in part by the Robert Wood Johnson Foundation, has impact, qualitative, and process components. With this evaluation, Metro will determine the impact of the subsidized annual pass on mobility outcomes; access to services such as health care, social services, education, and employment; and quality of life.<sup>7</sup> The research team includes Metro, Sound Transit, academic institutions Wilson Sheehan Lab for Economic Opportunities at Notre Dame (LEO Notre Dame), the University of Pennsylvania’s Perelman School of Medicine (UPenn), University of California at Irvine (UC Irvine), and local research firm PRR.

In 2023, this team fielded a series of surveys (ending with an 88 percent response rate) and added a qualitative component to better understand participant experiences and to add context to the impact evaluation.

In 2024 Metro will:

- Continue enrollment of eligible customers and re-enroll customers who still qualify after their annual transit pass has expired.
- Improve and standardize regional communication efforts with eligible people and human service agencies who serve them.

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<sup>7</sup> Via \$622,996 in grant funding from the Robert Wood Johnson Foundation’s [Evidence for Action Program](#) (grant #78767, \$447,996, September 1, 2021 – August 31, 2023; grant # 80685, \$175,000, September 1, 2023 – August 31, 2024). King County and Sound Transit funds also support the evaluation.

- Support DSHS in their transition back to pre-COVID operations at their Community Services Offices, and new enrollment locations at mobile locations. Provide training and on-site support as requested by DSHS.
- Develop short how-to videos and written tools for human service agencies that refer, enroll, and renew customers in the program.
- Increase in-person community-level outreach through Public Health, Catholic Community Services, and Metro’s Neighborhood Pop-Up program.
- Complete the impact evaluation by finalizing an agreement with the State of Washington to access administrative data, completing data collection and analysis.
- Enhance the evaluation’s qualitative component.
- Disseminate evaluation findings and develop a series of recommendations for study design and recruitment that can be used for future studies.
- Work within the agency-wide Fares Enterprise Initiative to further develop fares and programs that are equitable and easy to use and administer.
- Encourage other regional transit agencies to participate in a comprehensive Human Centered Design Thinking approach to reduced fare program simplification. Work toward regional alignment on fare strategies so that riders can travel between increasingly integrated transit systems. Work with partners to consider proposals that would require regional approval.

Using findings from the subsidized annual pass evaluation and larger Design Thinking approach under the Fares Enterprise Initiative, the Executive will propose adjustments and enhancements in future reports to the Council and in future budget proposals.

## II. Background

### Department Overview

King County Metro (Metro) is the Puget Sound region’s largest public transportation agency with more than 123 million riders in 2019 and more than 65 million riders in 2023. In addition to approximately 200 bus routes and water taxi service, Metro provides Access paratransit for people with disabilities, a commuter vanpool program, and on-demand services, as well as operates Seattle Streetcar, Sound Transit Link light rail, and Sound Transit Express bus service. Metro is committed to providing safe, equitable, and sustainable mobility, and prioritizing service where needs are greatest.

### Historical Context

The King County Equity and Social Justice Strategic Plan is a blueprint for action and change that guides King County departments’ pro-equity policy direction, decision-making, planning, operations and services, and workplace practices to advance equity and social justice within County government and in partnership with communities.<sup>8</sup>

Under the goal of improving access to mobility options, the 2021-2031 Strategic Plan for Public Transportation directs Metro to employ an income-based approach to fares, ensuring that discounts are provided to those who cannot afford to pay the full fare.<sup>9</sup> Frequent and reliable service, along with other

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<sup>8</sup> [King County Equity and Social Justice Plan](#)

<sup>9</sup> [King County Motion 16049](#).

fare-revenue supported attributes of Metro’s system, expand mobility for those who rely on it the most, including those with low or no incomes.

Metro has provided a reduced fare for seniors since its first year of operation, and since then has developed an array of discounted fare programs with the goal of enabling mobility for everyone. In 2014 Metro established a low-income transit fare program.<sup>10</sup> A task force advised Metro on an implementation plan and provided the following recommendations: a \$1.50 fare, regardless of zone or time of day, available to individuals with household incomes at or below 200 percent of the federal poverty level (FPL) and implementation in partnership with third-party agencies to determine eligibility and enroll customers.<sup>11</sup> In 2023, the Council adjusted the ORCA LIFT fare to \$1.00 for a pilot period ending on January 1, 2025.<sup>12</sup>

Following the task force recommendation, Metro and Public Health – Seattle & King County (Public Health) created an innovative partnership, leveraging Public Health’s experience conducting outreach and income verification to streamline enrollment. From this partnership, in March 2015, Metro introduced a new income-based fare category, [ORCA LIFT](#).<sup>13</sup> The income-verifying agencies, led by Public Health and subsequently including the Washington State Department of Social and Health Services (DSHS), have issued more than 217,089 new and renewal ORCA LIFT cards since the program’s inception.<sup>14</sup>

In a 2018 report to the Council, Metro evaluated potential programs to increase transit affordability for various categories of people and concluded that a comprehensive, income-based approach to fares is most consistent with King County’s equity goals.<sup>15</sup> Afterward, in response to a Proviso in the 2019-2020 King County budget, Metro analyzed data, conducted market research, convened a Stakeholder Advisory Group, and engaged with potential customers to inform the development of a new income-based program.<sup>16, 20</sup> This work indicated that:

- Affordability of transit and transportation is a key racial justice and economic mobility issue.
- The increasing cost of living in King County exacerbates the need for affordable transportation.
- People with no or low incomes are more dependent on public transit for their mobility than others and rely on high-quality alternatives to driving.
- More evidence is needed to determine what increases access to mobility for people with low incomes, and how access is impacted by fare affordability and other attributes that people with low incomes cite as priorities, such as safety, service, speed, and reliability.
- More work is needed to ensure that those who are eligible for reduced fare programs and want to use transit can access and use the fare programs.

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<sup>10</sup> [King County Motion 14246](#).

<sup>11</sup> King County Metro Transit, [Low-Income Fare Implementation Task Force Report](#), August 15, 2014.

<sup>12</sup> [King County Ordinance 19705](#).

<sup>13</sup> [King County Motion 14246](#).

<sup>14</sup> DSHS became an ORCA LIFT verifying agency in 2017.

<sup>15</sup> King County Metro Transit, [Making Metro More Affordable and Accessible](#), September 27, 2018.

<sup>16</sup> [King County Adopted Budget](#), Ordinance 18835, Section 109, Transit, P3, p. 128.

The advisory group recommended that Metro launch a new program that:

- Focuses resources on the people most in need.
- Partners with human service agencies so customers are served by a trusted provider and have access to wrap-around support.
- Considers the capacity limitations of the human service agency partners who would lead customer enrollment.
- Strives for regional integration, particularly with Sound Transit.
- Provides a sustainable benefit that does not impact Metro’s ability to provide and grow service.
- Includes robust outreach and education to make it easy for people to learn about and use new and existing reduced fare programs.

Based on the Stakeholder Advisory Group and Metro’s recommendations, the Executive proposed and the Metropolitan King County Council approved the new program, hereafter referred to as the “[subsidized annual pass](#)” on February 5, 2020.<sup>17, 18</sup> The Council added a requirement for annual evaluation reports for the previous calendar year, beginning in 2020 and ending in 2024.<sup>19</sup> Prior to program implementation, Metro negotiated with Sound Transit, Seattle Department of Transportation (Seattle Streetcar), and Seattle Center (Monorail) to participate in the program on a pilot basis. In 2022, these agencies renewed their pilot participation agreements through 2024. See Section E.

### **Current Context**

Metro launched the [subsidized annual pass](#) in October 2020 during the COVID-19 pandemic, an event that severely disrupted the transit system and regional human service network. These disruptions continued through 2023.

In 2023, Metro enrolled eligible customers; re-enrolled those whose passes expired; provided specialized, direct customer service; supported enrollment partners; provided training to agencies and individuals who refer people to the program; adjusted procedures to align with the new ORCA system; launched a regional communication effort to improve communications with ORCA LIFT and subsidized annual pass customers and the agencies that serve them; and launched a regional planning process to modernize the ORCA LIFT Registry to improve enrollment processes.

*Program design and eligibility* – This program is the first large-scale pass program that serves people who are qualified for the ORCA LIFT fare discount. The distinction between a subsidized pass and an income-based discounted fare is nuanced, but important to understand as it impacts Metro’s ability to expand the number of people who can be served:

- A subsidized pass requires an entity to purchase and manage a pass on behalf of the individual. Many employers purchase transit passes for their employees, which are managed by human

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<sup>17</sup> [Amended King County Ordinance 17757, Ordinance 19058.](#)

<sup>18</sup> [King County Motion 15600.](#)

<sup>19</sup> King County Metro Transit, [Metro's evaluation plan for income-based fares](#), September 11, 2020; King County Metro Transit, [Metro's 2020 evaluation report for income-based fares](#), June 30, 2021; King County Metro Transit, [Metro's 2021 evaluation report for income-based fares](#), June 30, 2022; [King County Metro Transit, Metro's 2022 evaluation report for income-based fares](#), June 30, 2023.

resource or transportation coordinator staff at each site. The individual receives their ORCA card through their employer and uses it to ride transit. If they lose their card, they replace it through their employer site. Individuals who receive subsidized transit passes from their employers are not enrolled in a discounted fare category, even if eligible. For the subsidized annual pass, Metro has staff that provide the administration and management for these passes, which are labor intensive and demand a high level of customer care.

- A discounted fare is a lower rate for riders that meet specific characteristics. Once enrolled, customers receive an ORCA card and load it with value to pay their fare. If they transfer to another mode or transit agency within two hours, the value paid is applied to the new trip. The ORCA Joint Board makes fare categories available, and each transit agency sets a fare for each category. ORCA LIFT is currently the only income-based fare category and Metro's ORCA LIFT bus fare is \$1.00.<sup>20</sup> Eligible people enroll in ORCA LIFT at third-party human service agencies who utilize state databases and other means to easily verify eligibility, then record enrollment and participant demographic information into Metro's ORCA LIFT Registry.<sup>21</sup>

Metro's subsidized annual pass combines a fully subsidized, income-based fare with management of an annual pass – features never combined on such a large scale in the Puget Sound region. Although it adds complexity, it is vitally important that customers enroll in the income-based fare category, as it ensures that they can access the lowest possible rate for all their trips, even after they have left the program. It also allows Metro to collect and analyze rider usage and demographic information for this evaluation report.

Upon enrolling in the subsidized annual pass, eligible people receive an ORCA LIFT card loaded with a fully subsidized annual pass that provides unlimited access to Metro, Everett Transit, Sound Transit, Seattle Streetcar, and Seattle Center Monorail.<sup>22</sup>

The enrollee does not need to pay fares for these transit rides, since the pass covers all trips on service provided by these agencies. If the enrollee rides on transit systems that don't currently participate, they can access the discounted ORCA LIFT rate by adding funds to their ORCA card.<sup>23</sup> The subsidized annual pass expires after the first year and is renewable if the person still meets eligibility criteria. If no longer eligible, former subsidized annual pass holders can load their card with value and pay for transit at the discounted ORCA LIFT rate.

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<sup>20</sup> King County Metro is piloting reducing the ORCA LIFT fare from \$1.50 to \$1.00 through January 1, 2025, via [King County Ordinance 19705](#).

<sup>21</sup> As discussed in Metro's [Income-based Fare Program Implementation Plan](#), due to limitations of the legacy ORCA system, Metro could not add a new fare category to provide a zero fare for people with incomes ≤80 percent of the federal poverty level by the Council-required implementation timeframe of 2020. So, the only option for a free-to-the-rider program at that income level was to develop and implement a subsidized pass. In the new ORCA system, Metro could reevaluate this with the other ORCA agencies and consider adding a new fare category.

<sup>22</sup> ORCA LIFT is the standard card type used for this program. Seniors and people with disabilities can receive their subsidized annual pass on an RRFPP (Regional Reduced Fare Permit) card if they prefer.

<sup>23</sup> Customers can load value onto their card via E-purse or passes and would pay the fare associated with the card type. As noted above, for most customers, this is ORCA LIFT, which is available on Metro, Sound Transit, Community Transit, Everett Transit, Pierce Transit, and Kitsap Transit. Customers who use transit systems that do not have an ORCA LIFT fare (Washington State Ferries) pay the regular adult fare using their ORCA LIFT card. People who receive their subsidized annual pass on an RRFPP card would access that rate across all systems.



Potential subsidized annual pass recipients must meet three criteria:

1. Income at or below 80 percent of the federal poverty level<sup>24</sup>
2. Enrollment in specific benefit programs – currently limited to six, administered by DSHS, with income qualifications at or below 80 percent of the federal poverty level<sup>25</sup>
3. Residence in King, Pierce, or Snohomish Counties<sup>26</sup>

Based on feedback from customers and the organizations that serve them, the enrollment and card management functions required to operate the pass program are split between Metro and third-party human service agencies:

- **DSHS, Public Health, and Catholic Community Services** lead enrollment. Staff at these agencies verify customer eligibility using state databases, enroll them in the program via Metro’s ORCA LIFT Registry, distribute cards, and re-enroll customers when their annual passes expire. Public Health and Catholic Community Services also conduct outreach in the community.
- **Metro** manages the program and passes for each individual enrolled. For program management, Metro develops and implements procedures, coordinates partner agencies, produces outreach materials, and leads the evaluation. Since this program includes fare media on cards (annual passes), Metro staff must complete a manual transaction to connect each customer’s ORCA LIFT card to the ORCA system via the ORCA LIFT Registry and manage each enrollee’s annual pass through a business account established for the program by Metro. A dedicated team of Customer Service Coordinators at Metro is responsible for pass management, which includes purchasing and adding passes to ORCA cards, activating cards, replacing lost or stolen cards, and mailing cards to participants. This work requires a high level of technical skill and direct customer service, as detailed in Section D.

*Improving service delivery* – With the impact, qualitative, and process components of this evaluation, Metro will determine the impact of the subsidized annual pass on mobility outcomes and access to services such as health care, social services, education, and employment, and quality of life.<sup>27</sup> Metro will also learn how to better serve this population with a subsidized fare option. The evaluation will inform changes or improvements that helps Metro service those with the greatest needs.

In 2023, Metro worked to align this program with the new ORCA system. Work to complete this transition is still in process and will continue over the next several years. See Sections B and D. Metro and the other ORCA agencies meet regularly to prioritize and address administrative issues of the new system; this collaboration helps to improve the customer experience. Representatives from Metro, Sound Transit, DSHS, Public Health, and Catholic Community Services meet every other week as a subsidized annual pass implementation team to identify new issues and collaborate on solutions.

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<sup>24</sup> Approximately \$10,000 for an individual, or \$22,000 for a family of four.

<sup>25</sup> Temporary Assistance for Needy Families (TANF)/State Family Assistance (SFA), Refugee Cash Assistance (RCA), Aged, Blind, or Disabled Cash Assistance (ABD), Pregnant Women Assistance (PWA), Supplemental Security Income (SSI), Housing & Essential Needs (HEN).

<sup>26</sup> Including people in Pierce and Snohomish Counties was a requirement of Sound Transit’s pilot participation.

<sup>27</sup> Via \$622,996 in grant funding from the Robert Wood Johnson Foundation’s [Evidence for Action Program](#) (grant #78767, \$447,996, September 1, 2021 – August 31, 2023; grant # 80685, \$175,000, September 1, 2023 – August 31, 2024). King County and Sound Transit funds also support the evaluation.

In 2023, Metro launched an agency-wide Fares Enterprise Initiative to further develop fares and programs that are equitable and easy to use and administer. The Fares Enterprise Initiative consists of four main bodies of work, including efforts to expand access to appropriate transit fares through ORCA, simplify Metro’s reduced fare program, develop a transition plan and timeline to phase out cash fare payments on-board buses, and update fare-related policies including the fund management policies that establish farebox recovery requirements.

As part of the Fares Enterprise Initiative, Metro will also work to simplify its reduced fare offerings using a Human Centered Design Thinking approach. This work will redevelop Metro’s fare products using feedback from riders and partner agencies. Using this approach, Metro will inventory current products and identify barriers to use of those products as verified by the customers that use them. After developing solutions to address those barriers, Metro will work with customers to understand their utility and ease of use to help create user-focused products tested to meet their needs. Findings from this work, as well as the subsidized pass evaluation, will inform future budget proposals and program recommendations. Metro will work with regional transit agencies to consider proposals that would require regional approval.

*Supporting Metro’s mission to become a mobility agency* – The subsidized annual pass is an important addition to Metro’s existing suite of reduced fare options as the agency continues to work toward a future where all King County residents have access to affordable, integrated, and equitable transportation service. Many subsidized annual pass riders face significant day-to-day challenges including housing insecurity, language barriers, and physical and behavioral health. The impact of the subsidized annual pass program on community health and wellbeing is the ultimate measure of success.

As mentioned in prior reports, Metro’s robust evaluation of the subsidized annual pass will assess whether providing fully subsidized transit impacts the health and wellbeing of its riders.<sup>28</sup> In 2021, Metro focused on finalizing the research design and implementation of the program. In 2022, Metro recruited study participants and began data collection for evaluation reporting. In 2023, Metro and the research partners completed recruitment and fielded both surveys and qualitative interviews with participants. In 2024, Metro and the research partners will analyze the results of the surveys and administrative data. Section C provides further details on the design and status of the evaluation.

## **Report Methodology**

This report was assembled by Metro with input from the King County Office of Performance, Strategy and Budget; program implementation partners Sound Transit, DSHS, Public Health, and Catholic Community Services; and impact evaluation partners at the Wilson Sheehan Lab for Economic Opportunities at Notre Dame (LEO Notre Dame), the University of Pennsylvania’s Perelman School of Medicine (UPenn), University of California at Irvine (UC Irvine), and the local research firm PRR.

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<sup>28</sup> King County Metro Transit, [Metro's evaluation plan for income-based fares](#), September 11, 2020; King County Metro Transit, [Metro's 2020 evaluation report for income-based fares](#), June 30, 2021; King County Metro Transit, [Metro's 2021 evaluation report for income-based fares](#), June 30, 2022; [King County Metro Transit, Metro's 2022 evaluation report for income-based fares](#), June 30, 2023.

For this report, Metro gathered data from the following sources:

- The ORCA LIFT Registry: Subsidized annual pass enrollment metrics and enrollee demographic data.
- The ORCA system: Transit use metrics. The ORCA system records ridership information (transit agency, mode, date, time, route, method of payment, and fare value) each time the card is tapped on an ORCA reader.<sup>29</sup>
- APC data: Total transit use for each transit agency.
- The Trapeze database: Rides on Access Paratransit.
- The DSHS Electronic Management Accountability Statistics (EMAPS): Summary-level data about enrollment in DSHS programs by primary language, age, benefit program, and race/ethnicity.
- Focus groups and interviews: Qualitative insights.

### III. Report Requirements

This report represents the evaluation information for calendar year 2023.

#### A. Customer Experience

##### **Who is served and how they use the pass**

*Number of enrollees* – In 2023, 12,642 people enrolled or reenrolled in the subsidized annual pass (8,393 new enrollments and 4,249 renewals). As in prior years, many people needed support replacing lost or stolen cards during the year.

*Transit used*<sup>30</sup> - In 2023, customers used their subsidized annual passes to cover their fares on a total of 3,296,344 trips across the participating transit agencies. Subsidized annual pass trips made up three percent of King County Metro’s overall boardings, one percent of Sound Transit boardings, three percent of Seattle Department of Transportation’s Seattle Streetcar boardings, less than one percent of Everett Transit’s boardings, and one percent of Seattle Center Monorail ORCA boardings.<sup>31</sup>

Of trips by transit agency, most subsidized annual pass boardings were on Metro services (81 percent, or 2,675,583 boardings), followed by Sound Transit (17 percent, or 556,397 boardings), Seattle Department of Transportation (1.4 percent, or 40,997 boardings), Everett Transit (0.3 percent, or 11,196 boardings), and Seattle Center Monorail (less than 0.2 percent, or 7,809 boardings). See Figure 1.

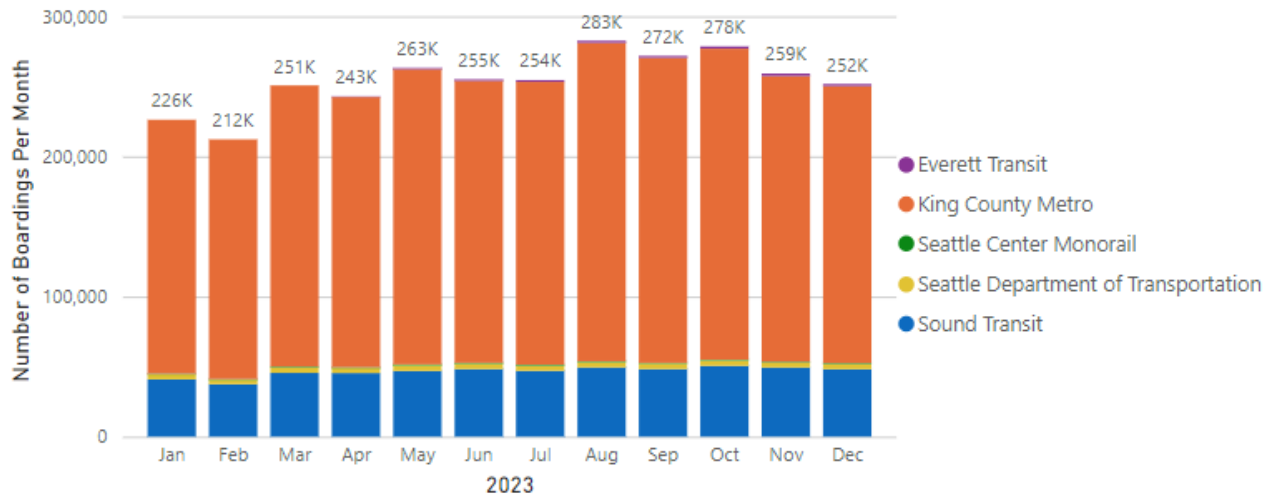
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<sup>29</sup> The participating ORCA agencies: Community Transit, Everett Transit, King County Metro, Kitsap Transit, Pierce Transit, Seattle Center Monorail, Seattle Streetcar, Sound Transit, and Washington State Ferries.

<sup>30</sup> “Boardings” refers to any leg of a trip taken using an ORCA card, “transit agency” is the agency providing the transit service (Metro, Sound Transit, etc.), and “mode” refers to the type of transit used (bus, rail, other).

<sup>31</sup> In 2023, King County Metro had a total of 82,891,762 boardings, Sound Transit had a total of 40,205,000 boardings, Everett Transit had a total of 1,329,885 boardings, Seattle Department of Transportation’s Seattle Streetcar had a total of 1,326,630 boardings, and the Seattle Center Monorail had 694,291 ORCA boardings.

**Figure 1 Monthly subsidized annual pass boardings by transit agency**



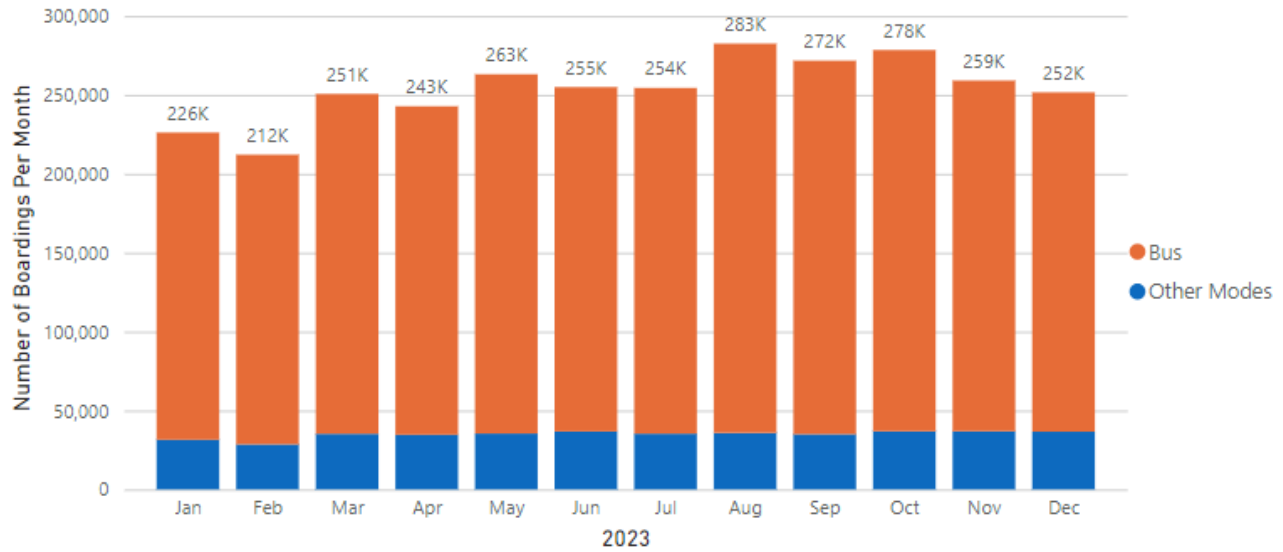
The participating transit agencies operate multiple modes:

- Metro boardings include bus, Access (paratransit service), demand response (Dial-A-Ride Transit, Via to Transit, Trailhead Direct, Ride Pingo to Transit, Community Ride, and Community Shuttle) and Water Taxi;
- Sound Transit boardings include Sound Transit Express bus, Link light rail, T-Line streetcar rail, and Sounder commuter rail;<sup>32</sup>
- Everett Transit boardings includes bus;
- Seattle Center boardings include the Seattle Center Monorail, and
- Seattle Department of Transportation boardings include the Seattle Streetcar.

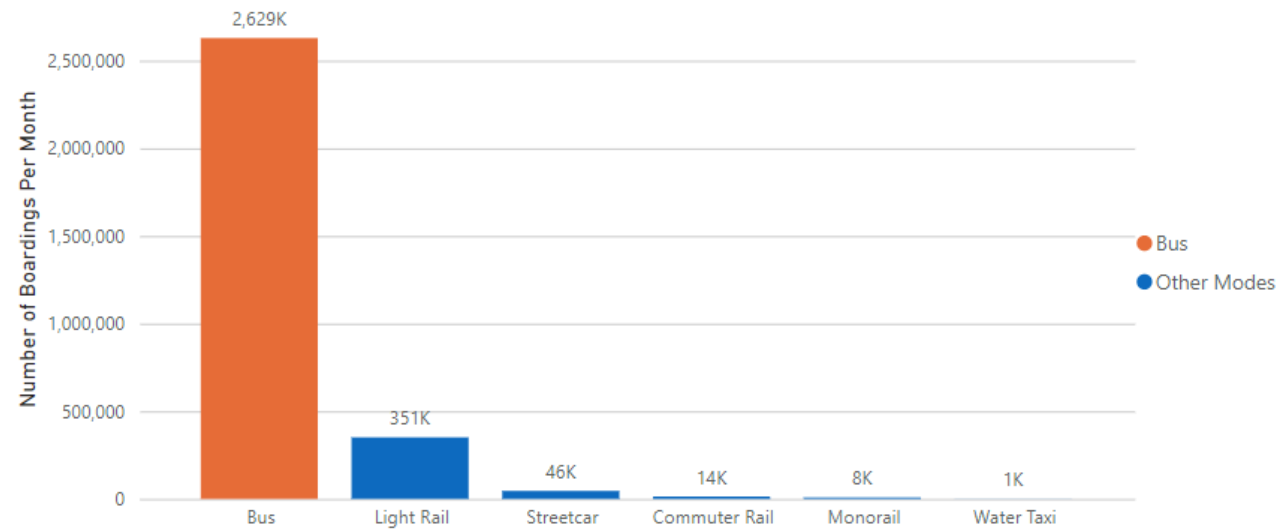
Of trips by mode, bus was the most common, followed by light rail. People took a total of 2,628,983 trips on Metro, Sound Transit, and Everett Transit buses; 350,863 trips on Sound Transit Link light rail; 248,686 trips on Metro’s Access Paratransit service; 44,593 trips on the two Seattle Department of Transportation Seattle Streetcar lines; 15,982 trips across Metro’s suite of demand response options (Dial-A-Ride Transit, Via to Transit, Trailhead Direct, Ride Pingo to Transit, Community Ride, and Community Shuttle); 13,651 trips on Sound Transit’s Sounder commuter rail; 7,809 trips on Seattle Center’s Monorail; 766 trips on Metro’s two Water Taxi lines, and 993 trips on Sound Transit’s T-Line Streetcar rail. See Figure 2 for a comparison of bus and non-bus monthly boardings and Figure 3 for boardings by all modes.

<sup>32</sup> Sound Transit introduced fares on the T-Line streetcar rail in September 2023. Previously, this service was fare-free for all, so these trips were not included in subsidized annual pass reporting. For this report, the T-Line streetcar trips are included in the Sound Transit trip total, as well as the streetcar mode trips in Figure 3.

**Figure 2 Monthly subsidized annual pass boardings by mode**



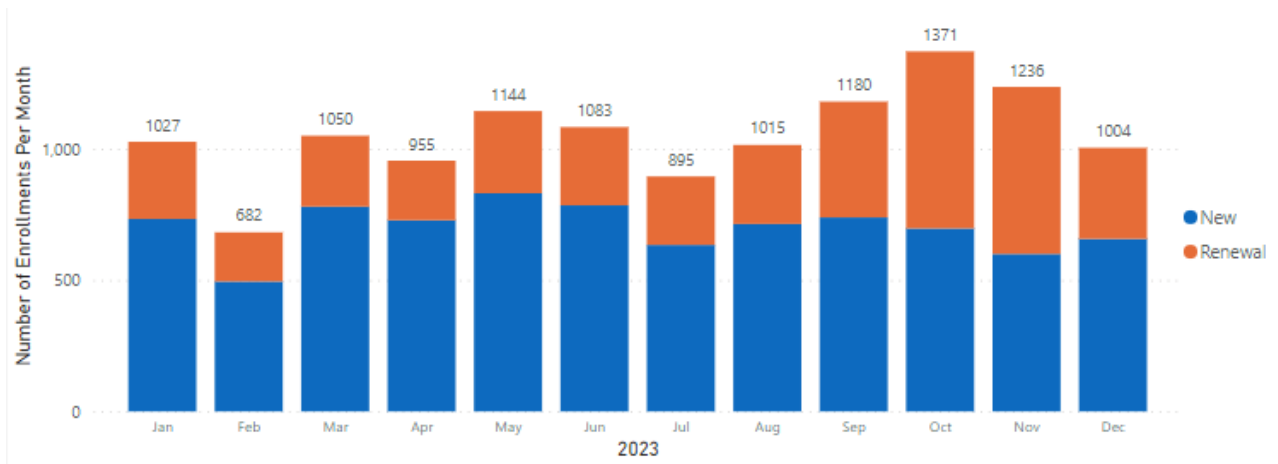
**Figure 3 Annual subsidized annual pass non-bus boardings by mode**



**Level of participation**

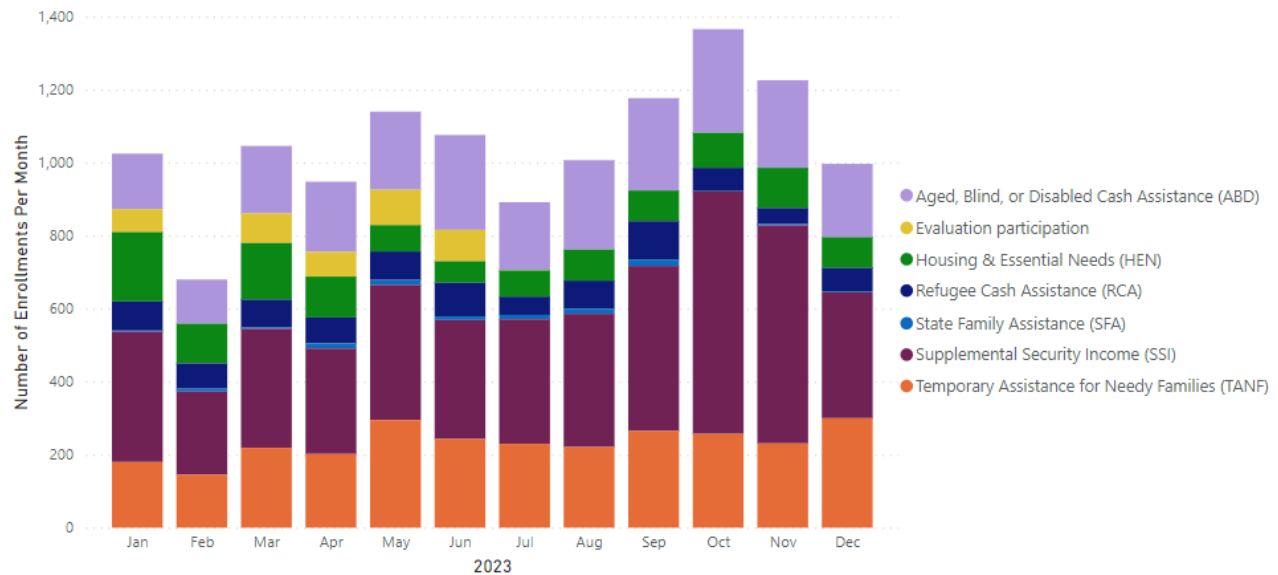
*How many participated* – Of the 12,642 who enrolled or reenrolled in the program in 2023, 8,393 newly enrolled and 4,249 renewed (see Figure 4). In 2023, 38 percent of customers whose subsidized annual passes expired during the year renewed their passes.

**Figure 4 Enrollment by month**



Of the state benefit programs included in program eligibility, most people enrolled via Supplemental Security Income (SSI).

**Figure 5 Monthly enrollment by benefit program**

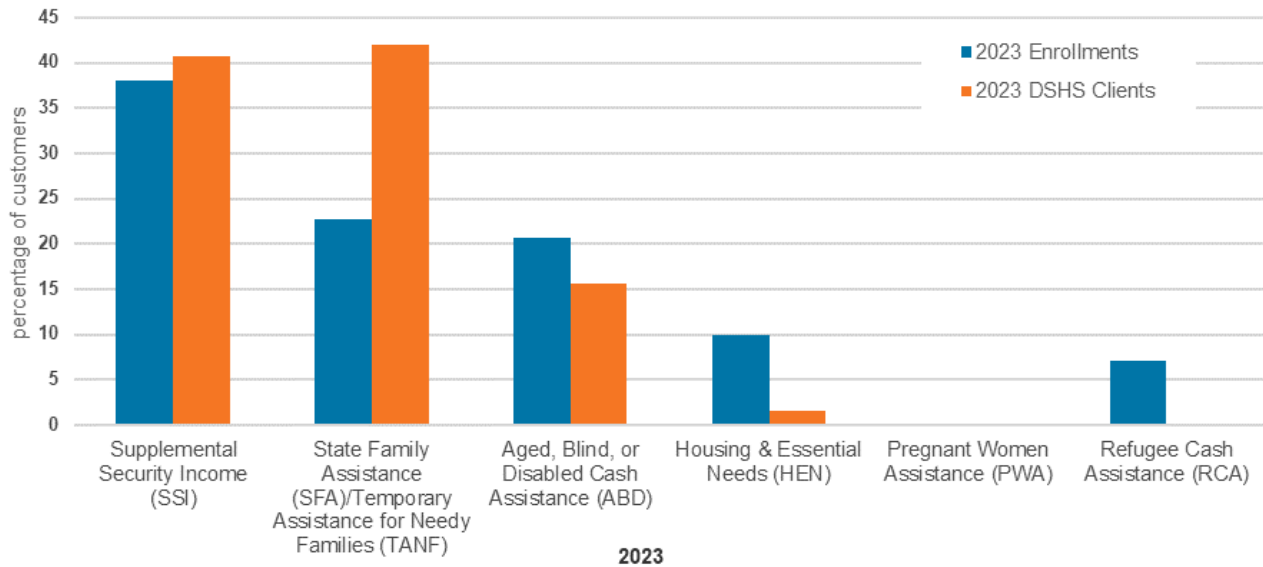


**Table 1 Enrollment by benefit program**

BENEFIT PROGRAM	2023 TOTALS
Supplemental Security Income (SSI)	4,660 (37 %)
Temporary Assistance for Needy Families (TANF)	2,788 (22%)
Aged, Blind, or Disabled Cash Assistance (ABD)	2,533 (20%)
Housing & Essential Needs (HEN)	1,228(10%)
Refugee Cash Assistance (RCA)	869 (7%)
Evaluation Participation	396 (3%)
State Family Assistance (SFA)	106 (1%)
Pregnant Women Assistance (PWA)	0 (0%)

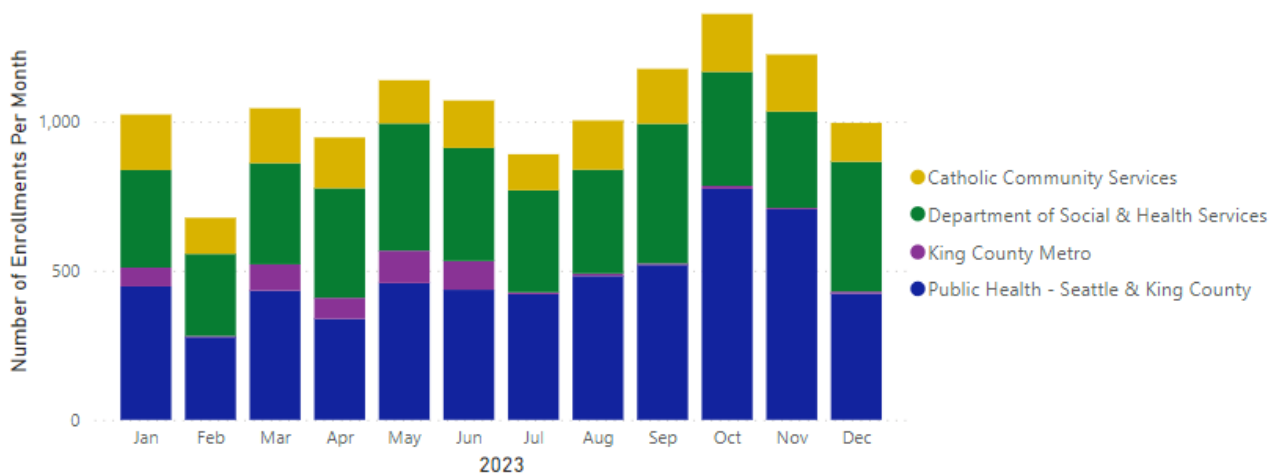
Figure 6 shows enrollment in the subsidized annual pass compared to the eligible population.

**Figure 6 Enrollment by benefit program compared to eligible population**



As in previous years, Public Health processed most enrollments (5,744 by phone through their [Community Health Access Program \(CHAP\)](#), in person at ORCA LIFT offices and at outreach events, and online through the [Reduced Fare Portal](#). DSHS enrolled 4,416 individuals by phone via their statewide Customer Service Contact Center and in person at Community Service Offices. Catholic Community Services enrolled 1,974 individuals by phone and in person at their office and at outreach events. Metro directly enrolled a small number of riders on the first half of the year to support the evaluation. See Figure 7.

**Figure 7 Monthly enrollment by enrolling agency**



*Demographics of current participants* – The following demographic information is available directly to Metro through the ORCA LIFT Registry and is included in this report: race, primary language spoken, age,

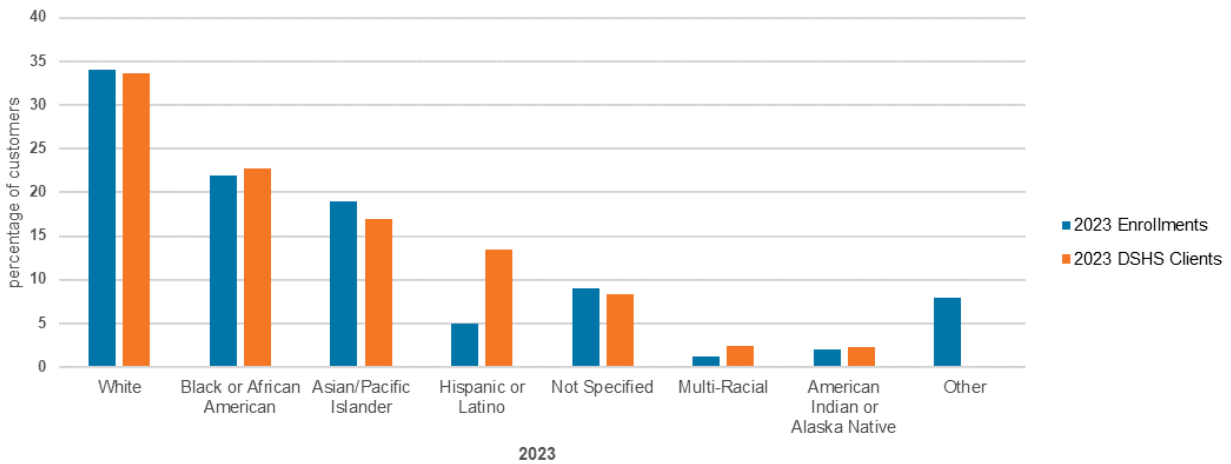
and geography. DSHS data is also available for race/ethnicity, primary language, age, and benefit program.<sup>33</sup> In the cases where there is enrollment data for both enrolled subsidized annual pass customers and eligible DSHS clients, a comparison chart is included.

Most customers enrolled in 2023 reported a race other than white (see Table 2). Figure 8 compares enrolled customers to the eligible population using subsidized annual pass enrollment data and DSHS administrative data of eligible clients.

**Table 2 Enrollment by race/ethnicity**

RACE/ETHNICITY	2023 TOTALS
White	4,299 (34%)
Black or African American	2,791 (22%)
Asian	2,249 (18%)
Not Specified	1,092 (9%)
Other	1,063 (8%)
Hispanic or Latino	657 (5%)
American Indian or Alaska Native	241 (2%)
Native Hawaiian or Other Pacific Islander	133(1%)
Multi Racial	117 (1%)

**Figure 8 Enrollment by race/ethnicity compared to eligible population**



People who enrolled or reenrolled in the subsidized annual pass in 2023 spoke 22 different primary languages, with 36 percent speaking a primary language other than English (see Table 3 for enrollment by primary language and Figure 9 for a comparison with the eligible population).

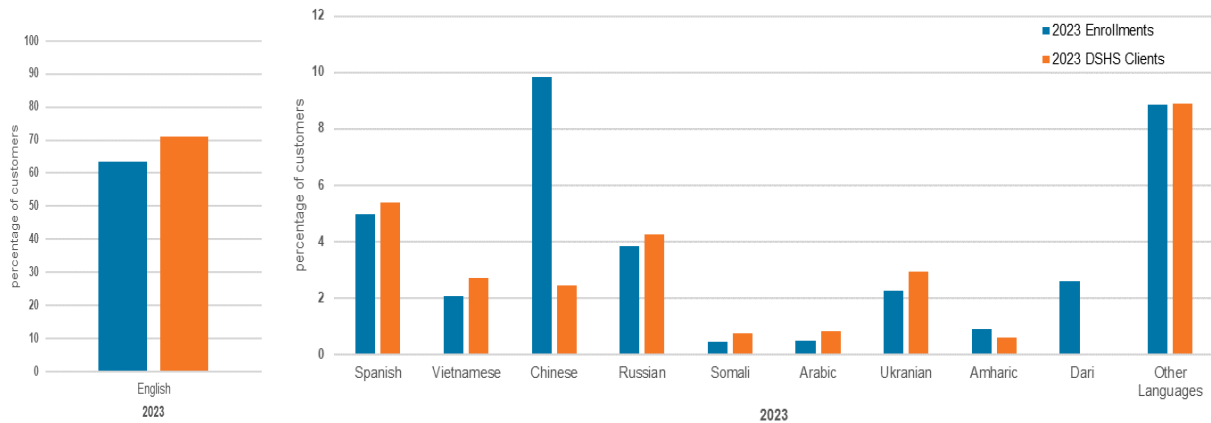
<sup>33</sup> DSHS Management Accountability and Performance Statistics (EMAPS). Due to low enrollment numbers, information about clients enrolled in Pregnant Women Assistance and Refugee Cash Assistance is not included in this report to protect client privacy.



**Table 3 Enrollment by primary language spoken**

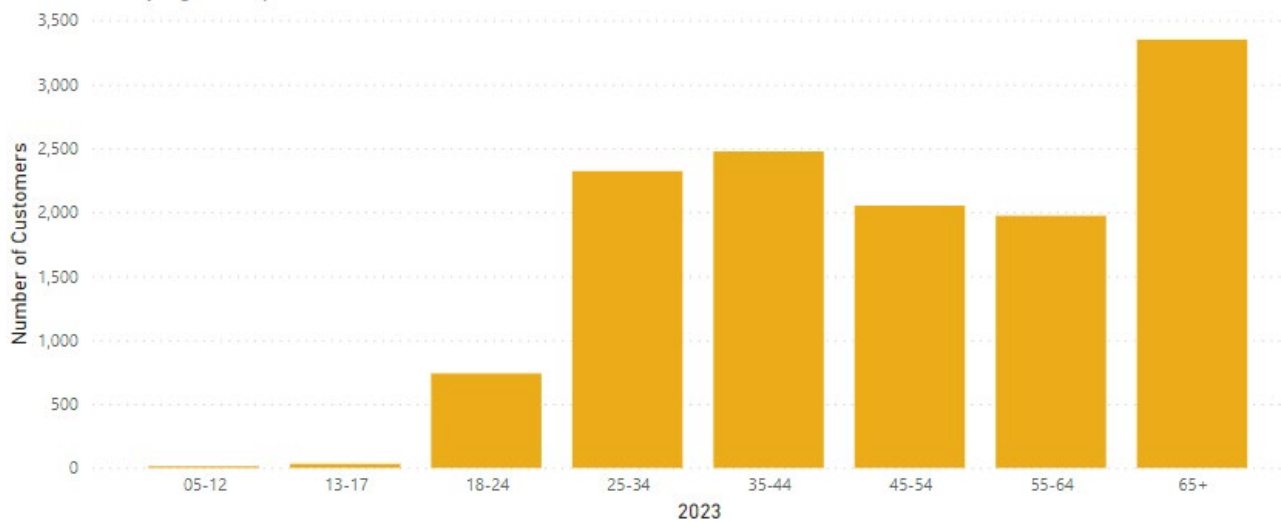
LANGUAGE	2023 TOTALS
English	8,042 (64%)
Chinese	1,244 (10%)
Spanish	631 (5%)
Russian	489 (4%)
Other	441 (3%)
Dari	328 (3%)
Ukrainian	288 (2%)
Vietnamese	268 (2%)
Not Specified	193(2%)
Tigrinya	127 (1%)
Farsi	119(1%)
Amharic	117(1%)
French	108 (1%)
Arabic	62 (<1%)
Somali	56(<1%)
Korean	34 (<1%)
Punjabi	32 (<1%)
Tagalog	22 (<1%)
Cambodian	18 (<1%)
Oromo	16 (<1%)
Laotian	5 (<1%)
Samoan	3 (<1%)
Hindi	2 (<1%)
Japanese	2 (<1%)

**Figure 9 Enrollment by primary language compared to eligible population**

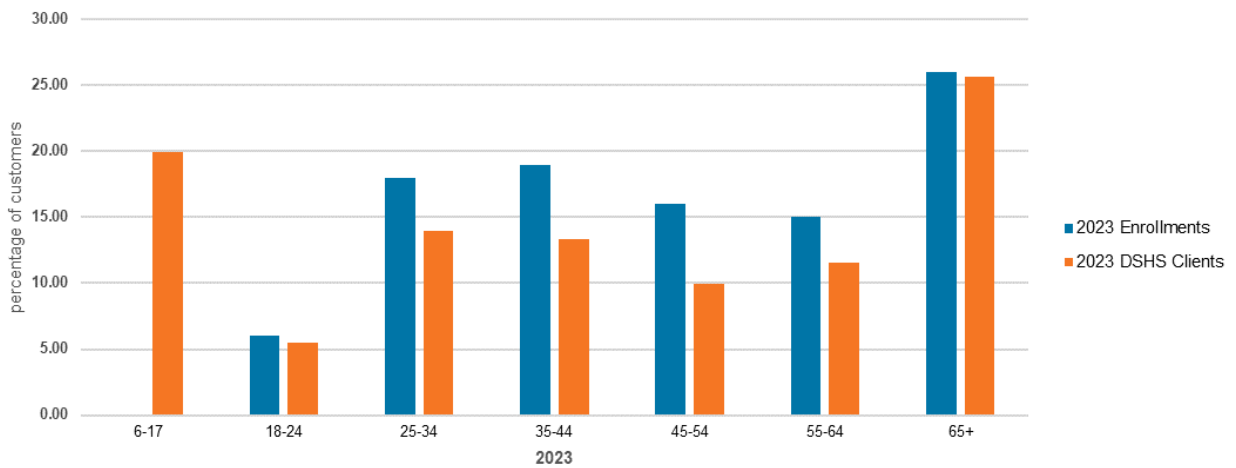


As in previous years, the largest age group (3,325) of customers who enrolled or reenrolled in the subsidized annual pass was seniors aged 65 and over.

**Figure 10 Enrollment by age group**



**Figure 11 Enrollment by age group compared to eligible population**



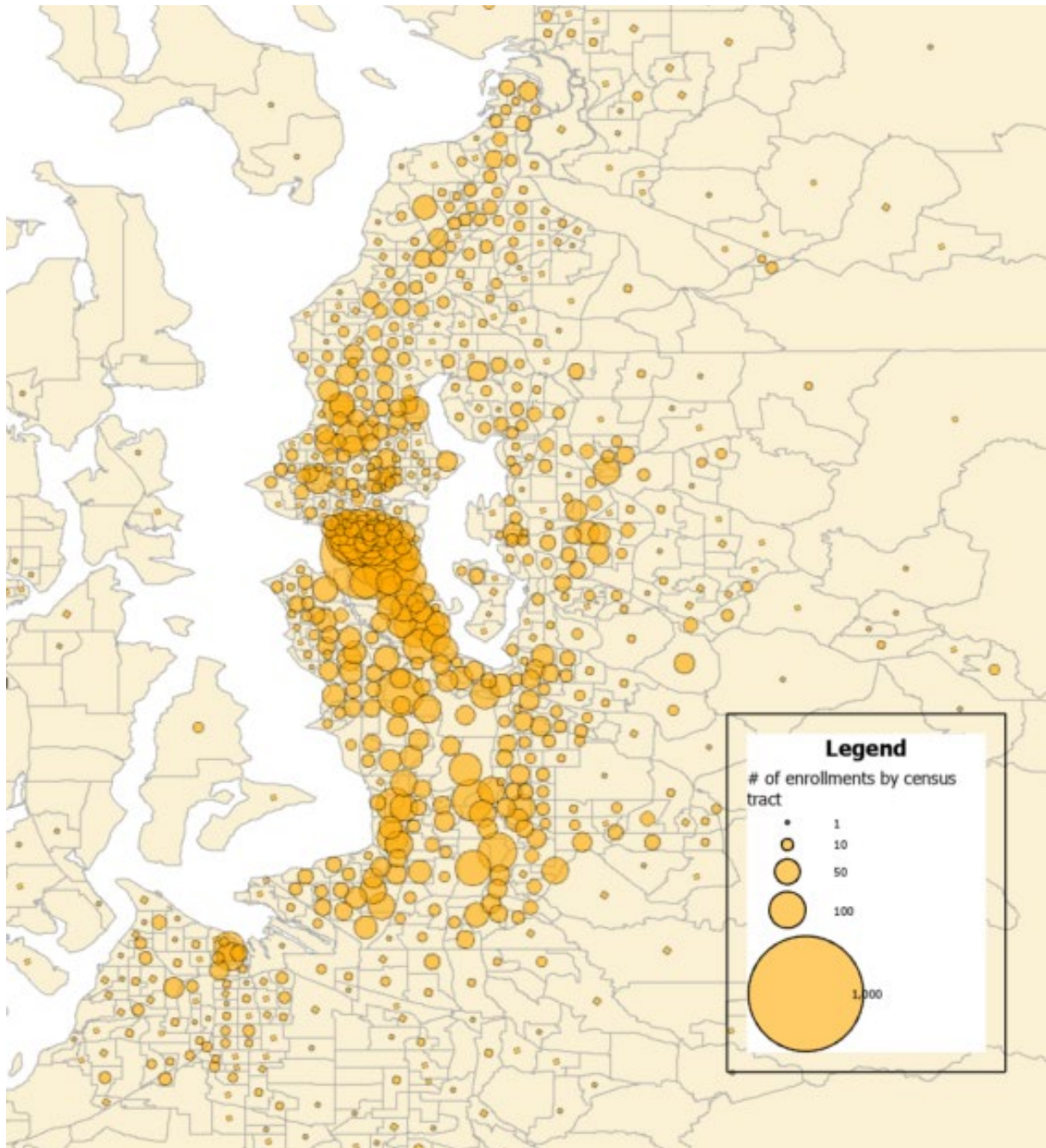
In 2023, 88 percent (11,164) of new and renewing enrollees reported living in King County, six percent (804) reported living in Snohomish County, and five percent (606) reported living in Pierce County. Table 4 breaks down these enrollments by the top cities, as well as by new enrollments and renewals. Figure 12 illustrates enrollment by census tract.

**Table 4 New and renewal enrollments by county and city<sup>34</sup>**

	<b>NEW ENROLLMENTS</b>	<b>RENEWAL ENROLLMENTS</b>
<b>King County</b>	<b>7,024 (84%)</b>	<b>4,140 (98%)</b>
Seattle	3,061 (44% of King County)	2,851 (69% of King County)
Kent	820 (12% of King County)	146 (4% of King County)
Auburn	458 (7% of King County)	130 (3% of King County)
Federal Way	489 (7% of King County)	109 (3% of King County)
Renton	368 (5% of King County)	139 (3% of King County)
Bellevue	230 (3% of King County)	178 (4% of King County)
<b>Pierce County</b>	<b>559 (6%)</b>	<b>47 (1%)</b>
Tacoma	419 (75% of Pierce County)	44 (94% of Pierce County)
Puyallup	39 (7% of Pierce County)	5 (11% of Pierce County)
Lakewood	59 (11% of Pierce County)	5 (11% of Pierce County)
<b>Snohomish County</b>	<b>754 (9%)</b>	<b>50 (1%)</b>
Everett	331 (44% of Snohomish County)	35 (70% of Snohomish County)
Lynnwood	222 (29% of Snohomish County)	22 (44% of Snohomish County)
Marysville	62 (8% of Snohomish County)	5 (10% of Snohomish County)

<sup>34</sup> Program eligibility is based on current county of residence, but some people have mailing addresses in other areas. Enrollment personnel enter this information into the ORCA LIFT Registry and could make an error by reporting the county of residence as the mailing address. In 2023, 68 enrollees show as living in Kitsap County or 'Other,' which is likely due to this kind of error.

Figure 12 Enrollment by census tract



*How to increase participation* – In 2023, Metro initiated several strategies to increase enrollment among eligible people, including:

- Allocated resources to Public Health to fill enrollment and outreach gaps in King County.
- Increased outreach to ORCA LIFT enrollment locations in all three counties, so that they can refer people to Public Health for subsidized annual pass enrollment.
- Enhanced the toolkit developed in 2021 with additional resources requested by human service agencies and ensure the toolkit is easily accessible via the web.
- Promoted the revamped toolkit and presented to front-line staff at human service agencies about the subsidized annual pass and other fare options.
- Conducted outreach at various locations, led by Public Health and Catholic Community Services. Regular locations included Auburn Community Court, Ballard Food Bank, Opportunity Center for Education and Employment, Pike Place Market Commons, Seattle Municipal Court Resource Center, Shoreline Hopelink/Community Court, Skyway Pop Up Resource Center, Redmond Community Court, and Vashon Library. Pop-up-style outreach occurred at various locations, such as at health fairs and community events.
- Provided on-site and increased remote support for DSHS staff enrolling people in the program.
- Collaborated with Sound Transit and the ORCA vendor to support Everett Transit’s implementation of the subsidized pass program for their riders.
- Enrolled people in the program through the impact evaluation study recruitment.
- Communicated with Metro’s Access customers about subsidized annual pass eligibility and enrollment options.

In 2024, Metro will expand and enhance these efforts by working with other regional transit agencies on a coordinated communication and outreach strategy. Based on feedback from community partners, Metro will ensure that any communication about the subsidized annual pass is targeted toward those who likely qualify, includes specific guidance about eligibility, is translated into multiple languages, and includes information about other options for those who do not qualify. This in-depth outreach is more complex and time-consuming to conduct than wide promotion but provides the opportunity to set realistic expectations with residents and helps to human service agencies from becoming overwhelmed by those who are ineligible for the pass.

To continue to increase participation in 2024, Metro also plans to:

- Support DSHS in their transition back to pre-COVID operations at their Customer Service Offices, and new enrollment locations at mobile locations. Provide training and on-site support as requested by DSHS.
- Develop short how-to videos and written tools for human service agencies that refer, enroll, and renew customers in the program.
- Increase in-person community-level outreach through Public Health, Catholic Community Services, and Metro’s Neighborhood Pop-Up.

## B. Metro Experience

### Program costs

The total operating cost of the subsidized annual pass for 2023 was \$1,100,000, which includes program administration, staffing, materials and outreach, card stock, and evaluation. In-kind support, including verification, enrollment, and outreach activities, was provided by DSHS, Public Health, and Catholic Community Services.

### Fare media costs

In 2023, Metro did not purchase fare media for this program.<sup>35</sup>

### Support for human service partners

DSHS, Public Health, and Catholic Community Services did not receive additional financial support in 2023 to participate in this program. Public Health and Catholic Community Services utilize funding from Metro and Sound Transit for ORCA LIFT program operations to partially fund their activities related to the subsidized annual pass; DSHS does not receive any financial reimbursement.

The in-kind support provided by these agencies is invaluable to Metro and its customers. Along with leading customer verification and enrollment, these agencies worked with Metro to train staff, adjust program procedures for changing pandemic conditions, refine systems, develop program renewal procedures, and resolve problems. Information about the impacts to these partners can be found in Section D. Future ongoing support from partnering human service agencies may include financial compensation from Metro.

### Farebox recovery impacts

Metro's adopted fund management policies require that the farebox recovery for the fixed route bus system be targeted for 30 percent but do not fall below a floor of 25 percent.<sup>36</sup> Due to the unprecedented declines in ridership resulting from the COVID-19 pandemic, this policy was suspended for the 2023-2024 biennium.<sup>37</sup> In 2023, Metro's overall farebox recovery is estimated to be 8.8 percent.

### Foregone revenue to Metro services

Revenue from regional ORCA passes gets distributed between the ORCA transit agencies depending on ridership from those passes. Additionally, each transit agency may then need to further distribute revenue to different services within the agency. For regional ORCA passes, Metro typically further distributes a portion of revenue to King County Water Taxi, Seattle Department of Transportation (for

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<sup>35</sup> In previous years, Metro assigned a dollar value to each annual pass of \$756, which was modeled using a \$1.75 trip fare, to match the Access fare. Metro purchased each annual pass, as well as day passes which are loaded onto cards to ensure that riders have access to transit immediately, and then recognized the revenue for these products each month. However, in 2023, King County changed this accounting and assigned a dollar value of \$0 for these products. The value of the fare subsidy can be calculated by multiplying the previous annual pass cost (\$756/year) by the number of people enrolled or renewed in the program. In 2023, this figure would be \$9,557,352.

<sup>36</sup> [King County Ordinance 18321.](#)

<sup>37</sup> [King County Ordinance 19531.](#)

the Seattle Streetcar), and Seattle Center Monorail. However, the subsidized annual pass is an agency-specific pass. As such, accounting for all the foregone revenue goes toward Metro's general account. No further apportionment occurs unless an agreement is made otherwise. For the subsidized annual pass, Metro's Water Taxi, Seattle Department of Transportation, and Seattle Center Monorail agreed to forego the revenue for their services. The following estimates calculate how much revenue those services, as well as Metro's Access Paratransit service, would have typically received from apportionment systems in place if those trips had been taken on a regional ORCA pass instead. For Metro services, the value of the trips for Water Taxi totaled \$2,476 and Access Paratransit totaled \$435,200.<sup>38</sup> For services on other transit agencies that are listed as Metro routes in the ORCA system, the value of the trips for Seattle Department of Transportation (for the Seattle Streetcar) totaled \$26,295 and Seattle Center Monorail totaled \$8,580.<sup>39</sup>

### **Program operations**

In 2023, program operations cost approximately \$1,097,123. The largest expense was the *Staffing* category, which includes wages and benefits. As explained earlier, operating a pass program requires a significant level of consistent staff support at Metro. Metro allocated seven full-time positions to directly support this program: six Customer Service Coordinators and one Lead Customer Service Coordinator. The Coordinators manage the business account functions and provide customer service to enrollment agencies and customers; the Lead manages day-to-day operations and provides oversight of and supports the specialist team. To ensure fiscal controls, the Customer Service Coordinators are the only staff members who can manage the passes in Metro's business account. The following section details the customer service functions for these staff members. Other Metro staff members provide additional support for implementation, communication, and evaluation.

In other budget categories, *Evaluation* includes costs to launch the multi-year study to evaluate impact, as noted in Section C. *Administration and Overhead* includes office supplies, technological improvements to the ORCA LIFT Registry, and wages and benefits for staff time required to manage the program. *Materials and Outreach* includes promotional materials, translation services, card holders and lanyards for customers to prevent lost cards, and postage.

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<sup>38</sup> The 2023 trips taken resulted in a CEFFV of \$2,912 for Water Taxi. The revenue calculation is based on current ORCA apportionment rates where Water Taxi receives an average of 85 percent of the CEFFV. Apportionment rates are calculated from how revenue from boardings is split and are calculated based on transfers across different services.

<sup>39</sup> The 2023 trips taken resulted in a CEFFV of \$12,658 for Seattle Center Monorail and \$41,071 for Seattle Streetcar. The revenue calculation is based on current apportionment rates where Seattle Center Monorail receives an average of 68 percent of the CEFFV and Seattle Streetcar receives an average of 64 percent of the CEFFV.

**Table 5 Operations costs**

<b>CATEGORY</b>	<b>2023 TOTALS</b>
Staffing	\$778,000
Evaluation	\$174,000
Administration & overhead	\$123,000
Materials & outreach	\$23,000
<b>Total</b>	<b>\$1,098,000</b>

Sound Transit reimburses Metro for a portion of these line items, mostly to cover Metro’s operating costs for enrollees outside of King County. Sound Transit’s pilot participation agreement allows for a \$2 million cap on these reimbursements through their pilot period.

**Impacts on transit operations**

*Impact on customer service* - The primary impact to transit operations in 2023 was related to direct customer service, and predominantly experienced among the Customer Service Coordinator team assigned to support the program. Like prior years, impacts to other customer service groups, including Metro’s Customer Information Office and Pass Sales Office, were minimal, since staff in those groups generally refer customers with questions or needs directly to the Customer Service Coordinator team.<sup>40</sup>

The Customer Service Coordinators have two primary duties: to manage passes on ORCA LIFT cards via Metro’s business account and to provide direct customer service to enrollees and partner agencies. This team also took on additional duties to support the enrollment agencies, particularly DSHS, which had lower operational capacity due to ongoing COVID-19 impacts. In 2023, the Customer Service Coordinators managed annual passes for new and renewing customers, fielded 11 to 17 calls per day from customers, and replaced 3,400 lost or stolen cards. The Customer Service Coordinators have a dedicated phone number and email address for these interactions and work a hybrid schedule of in-office and telecommute.

The complexity of customer interactions varies greatly, and many customers require specialized support or need help with other issues like lost items or understanding the transit system. Interactions are often not straightforward, since common issues like eligibility and how to use an ORCA card are complex and many customers may have comprehension issues or need translation services. As a result, staff must provide personalized support and spend a great deal of time on a relatively small number of customer interactions. Very few calls or in-person interactions handled by Customer Service Coordinators would be considered short (less than five minutes). Most interactions are between five and 15 minutes, but some take up to 60 minutes in length.

Time-intensive duties for the Customer Service Coordinators include:

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<sup>40</sup> Precise metrics for customer service interactions via Metro’s Customer Information Office and Pass Sales Office are difficult to gather since it requires front-line staff to report the topic of their interactions with customers and separate out non-subsidized annual pass needs.



- Providing general support to customers who are enrolled in the program. Common issues include troubleshooting card problems and explaining how to use the ORCA system, determining which transit services are covered by the subsidized annual pass and for how long, and explaining how to add value to cards to ride on non-participating transit agencies.
- Supporting enrolled customers with resolving negative balances. The ability to accumulate negative balances is a feature of the new system. It allows customers to complete their trip and any transfers with a small negative balance, giving them time to add funds to their card. When a customer reaches a balance of -\$2.75, the card gets blocked, and the customer needs to resolve the negative balance by adding value to their card. Customers enrolled in the subsidized annual pass may have negative balances if they do not renew their annual pass before it expires and continue to ride, or if they ride on a non-participating transit agency and do not have value on their card. Customer Service Coordinators must manually resolve negative balances and unblock the card before replacing lost or stolen cards or adding new passes to the card. Then, they work with customers and partner agencies to ensure they thoroughly understand what is and is not covered by annual passes and how to know when the pass expires, to reduce the likelihood of accumulating negative balances in the future.
- Replacing lost and stolen cards. Replacing cards is extremely common. Some customers replace their card so often that coordinators know them on a first name basis. Many subsidized pass customers are vulnerable to losing their card or having it stolen, especially if they do not have a permanent address or experience mental illness or a disability. Each replacement interaction requires 10-60 minutes of Customer Service Coordinator time.
- Referring customers to enrollment locations. While customers must come to Metro for troubleshooting and card management issues, they must enroll (or reenroll if they still qualify at pass expiration) at DSHS, Public Health, or Catholic Community Services. Customers who are confused about this process may come to Metro for help enrolling instead, so Customer Service Coordinators must spend time explaining the process to customers and referring them to the enrollment agencies.
- Managing passes in the ORCA system. The Customer Service Coordinators place an order in the ORCA system each day for annual passes. The process for ordering passes changed with the launch of the new ORCA system but still requires research and troubleshooting for each card, especially since customers get subsidized passes on ORCA LIFT cards. As a result, the process of loading passes on cards often takes most of the day for one Customer Service Coordinator. Before the new ORCA system launched, the staff team spent a great deal of time handling expired work orders. Until the launch of the new ORCA system, customers who enrolled but did not tap their cards within 60 days required a manual process to renew the pass, as well as customer service interactions via phone or in person. This issue was resolved with the launch of new ORCA technology.
- Processing returned mail. Metro's Customer Service Coordinators mail ORCA cards to any customer who enrolls through DSHS or via phone or web. Since many customers eligible for this program have unstable housing and cannot receive mail reliably, much of this mail is returned, requiring processing by the Customer Service Coordinator team and proactive attempts to contact the customer. This issue is compounded by DSHS's benefits enrollment system, which continues to operate on COVID-19 protocols. When DSHS enrolls customers, they add their information to a DSHS-specific system, then someone else at DSHS enters the information into

the ORCA LIFT Registry. The DSHS data system has no field for an email address, so this information cannot be captured. Often, the enroller does not record the customer’s phone number either. As a result, the Customer Service Coordinator team cannot reach many customers who do not receive their card in the first attempt, then customers need to contact Metro or the enrolling agency to go through the enrollment process again. In 2023, at least 1,200 cards were returned in the mail.

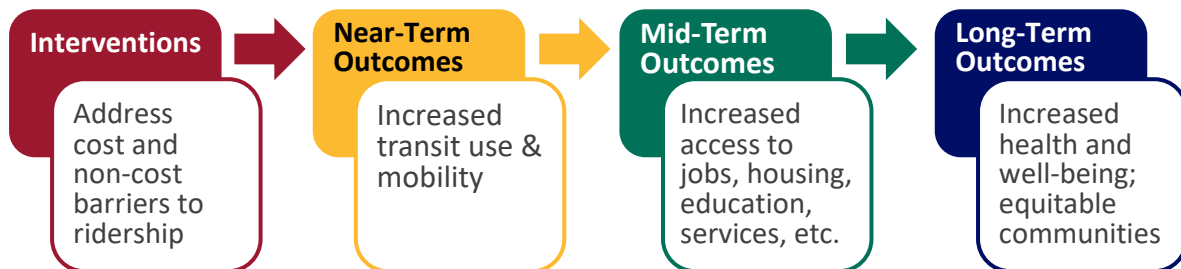
- Supporting staff at the enrollment agencies and other human service partners. These interactions generally happen online or via Teams chat or emails. Correspondence varied based on the complexity of the issue, from two to 17 emails per request. In 2023, the team fielded 1,905 inbound emails from partnering agencies to resolve customer issues. These interactions typically revolve around validating renewals and eligibility, troubleshooting issues with enrollment, and managing supplies.

There is no economy of scale with this type of work; as more customers enroll, the team supporting them must take on more work. If this program expands as it is currently designed and without remedies to the administrative resources required to manage it, then the customer service resources must expand commensurately.

### C. Mobility Outcomes

Metro is conducting a multi-year study to evaluate the impact of the subsidized annual pass on mobility outcomes; access to services such as health care, social services, education, and employment; and health, well-being, and quality of life. The impact study is partially supported with funding from the [Evidence for Action Program](#) of the Robert Wood Johnson Foundation and led by a collaborative research team made up of the academic institutions LEO Notre Dame, UPenn, and UC-Irvine; program implementation partners at Metro, Public Health, and DSHS; and PRR, a local research firm.<sup>41</sup> In 2023, Metro and the research partners received \$175,000 in supplemental funding from the Robert Wood Johnson Foundation, bringing total grant support to nearly \$625,000. This additional funding supports additional recruitment efforts that were complicated due to COVID-19.

The impact study is part of Metro’s broader strategic learning agenda that is motivated by [King County’s Equity & Social Justice \(ESJ\) Strategic Plan](#) and the theory of change shown below:



<sup>41</sup> Via \$622,996 in grant funding from the Robert Wood Johnson Foundation’s [Evidence for Action Program](#) (grant #78767, \$447,996, September 1, 2021 – August 31, 2023; grant # 80685, \$175,000, September 1, 2023 – August 31, 2024). King County and Sound Transit funds also support the evaluation.

## **Study design**

The impact study utilizes three primary sources of data to understand each step in the causal chain: (1) a series of surveys among study participants to assess transit use, overall mobility, trip purposes, intermediate access to the determinants of equity (healthcare use, employment, income, benefits use, etc.), and finally, health and wellbeing outcomes; (2) administrative data from Metro and the State of Washington's integrated database; and (3) qualitative interviews with study participants. See Appendix B for a visual of the study design.

### Surveys

Metro and the research partners recruited survey participants by contacting existing ORCA LIFT enrollees and collaborating with community organizations. These participants were assigned to one of three distinct groups. The first group consists of individuals who are eligible for the subsidized annual pass and were enrolled after being contacted to participate in the study. The other two groups are individuals who are not eligible for the subsidized annual pass because they are not enrolled in one of the six qualifying DSHS cash benefit programs, but whose incomes are similar to those of people eligible for the subsidized annual pass. Half of these people are randomly assigned to receive the subsidized annual pass, and the other half are enrolled in ORCA LIFT and serve as the control group.

Despite the challenge of operating in the post-COVID environment, 1,845 people enrolled in the study and were invited to take a series of surveys. A total of 1,616 completed the final follow-up survey one year after joining the study, which reflects an 88 percent response rate. Achieving this high response rate is a key success of the study, especially considering the challenges typically encountered in maintaining contact with study participants with very low income.

Ensuring a high response rate is necessary to ensure that the research team analyzes accurate information about how the program affects all participants, not just those who are the easiest to contact. However, this required intensive efforts by the research partners and Metro customer service staff to maintain contact with participants. Metro received over 2,000 emails from study participants to a dedicated inbox and fielded many more questions from participants who called or came to Metro's Pass Sales Office or Public Health. In 2024, Metro and the research partners will document lessons learned that can inform similar research efforts with this population.

### Administrative data

Metro and the research partners will utilize data available from the ORCA system (including information included in this report) and State of Washington's integrated database. The research team is actively working with the state to receive and analyze the records related to healthcare use, public benefit receipt, employment, and contact with the criminal justice system.

### Qualitative inquiry

In 2023, Metro added a qualitative component of the research design to better understand the participant experiences and to add context to the impact evaluation. A total of 121 study participants participated in this phase of the research, which consisted of an online survey and one-on-one phone interviews. Metro prioritized hearing from respondents who identified with a race other than white, use languages other than English, and are disabled.

Key findings include:

*Respondents are connected to a diverse range of interests and daily activities using public transit after having a fully subsidized pass.*

- Respondents took more transit rides due to the savings involved with ORCA card.
- Having access to a full-subsidized ORCA card enabled respondents and their families to use public transit for more non-essential and/or recreational travel which they otherwise would have skipped.
- Respondents expressed a greater sense of personal freedom and connection to the broader community.

*Most respondents highlighted the impact of their fully subsidized pass on their personal financial health.*

- Before receiving the fully subsidized ORCA card, financial concerns generated stress and often caused respondents to limit their travel. Many respondents reported that their fully subsidized pass significantly eased their financial concerns related to transportation.
- Some respondents also commented on the convenience of not having to carry cash and not needing to keep a close eye on their ORCA account balance.

*Mobility challenges cannot be solved by the fully subsidized transit alone.*

- For many respondents, transit schedules did not align with their daily routines, either because service was too infrequent or because their travel occurred outside of peak commuting hours.
- Some respondents lived in areas where the nearest transit stop(s) are inaccessible due to distance, terrain, and/or mobility challenges.
- A few noted they did not receive accommodation for their disability when attempting to use public transit, either due to terrain at or near bus stops, or because the bus they were trying to ride didn't kneel.
- Respondents also cited safety concerns onboard buses and while waiting at transit stops as major barriers to accessibility. Although respondents said they enjoy riding buses, many reported that safety concerns had discouraged them from using public transit more often.

#### Next steps

In 2024, Metro and the research partners will finalize an agreement with the State of Washington to access administrative data, complete data collection and analysis, enhance the qualitative inquiry, disseminate findings, and develop a series of recommendations for study design and recruitment that can be used for future studies.

#### **D. Partner Experiences**

##### **Human service agencies**

As explained earlier, DSHS, Public Health, and Catholic Community Services lead outreach and customer enrollment. These agencies are invaluable partners to Metro in the implementation of the subsidized annual pass.

The main role of these partners is to enroll new and returning customers, which requires access to state databases and Metro’s ORCA LIFT Registry, as well as adequate staff capacity to meet customer demand. Staff at each of these agencies also participate with Metro on three teams: implementation, communications, and evaluation. Their engagement ensures that communications, outreach strategies, and impact evaluation plans are feasible and meet customer and agency needs. Staff provide necessary real-world context for Metro to mitigate technological challenges; streamline procedures, processes, and systems; and plan process enhancements.

Enrollment tasks include verifying customer identity and eligibility (generally using state databases); entering customer information into the ORCA LIFT Registry; providing customers with ORCA LIFT cards, lanyards, and how-to guides; and explaining how to use the ORCA LIFT card and annual pass.

In 2023, DSHS continued to enroll customers primarily through its statewide call center. In 2024, DSHS plans to reopen its Customer Service Offices for in-person enrollment. Until then, Metro staff supported DSHS by sending ORCA LIFT cards, lanyards, and how-to guides to customers through the mail; mailing ORCA LIFT cards to local DSHS offices for client pick up; and holding cards for pickup at Metro’s Pass Sales Office. Metro also provided ORCA LIFT cards associated with the subsidized annual pass to Public Health and Catholic Community Services, who in turn provided them directly to enrolled customers. These agencies enrolled people in person at their offices and at outreach events. Additionally, Public Health processed all web applications submitted through Metro’s Reduced Fare Portal and enrolled people by phone through its [Community Health Access Program \(CHAP\)](#).

These partner agencies’ experiences were consistent in 2023 from prior years. Staff at these agencies continue to spend a considerable amount of time communicating with the Metro Customer Service Coordinator team to confirm issues related to eligibility, enrollment, renewals, and pass usage. They also spend a great deal of time communicating with customers at the time of enrollment to try to mitigate future confusion about how to use the pass; how to add e-purse to ride on non-participating transit agencies, how to replace lost, stolen, or defective cards at Metro; and how to re-enroll when their pass expires.

Staff at the partner agencies continue to note that any expansion to eligibility or enrollment locations would be difficult without a commensurate expansion of this staff team and development of new systems that have wider permissions and fewer manual transactions.

Operating cost impacts among partner agencies were minimal in 2023.

## E. Regional Transit Agencies

Currently, three transit partners participate in Metro’s program on a pilot basis: Everett Transit, Sound Transit, Seattle Department of Transportation, and Seattle Center Monorail. As part of their participation, these agencies have waived their fare revenue, so Metro is not required to reimburse them for trips taken with subsidized annual passes. Since expanding participation could impact fare revenues, policy adjustments (like expanding program eligibility) must be agreed to by each entity.

- **Sound Transit** provides access to its buses, Link light rail, T-Line streetcar, and Sounder commuter rail. This positively impacts customer mobility, access, and reach, especially since new Link light rail stations across the region increasingly integrate Metro and Sound Transit

systems. Sound Transit provides financial reimbursement to Metro to manage the program and to support enrollments in Pierce and Snohomish Counties.

- **Seattle Department of Transportation** provides access to the Seattle Streetcar, and **Seattle Center Monorail** provides access to the Seattle Monorail. In the ORCA system, these services are defined as “Metro routes,” which means that customers holding a subsidized annual pass would have access to these services regardless of these agencies’ agreement to participate. In the new ORCA system, Metro can remove these routes from the pass. However, by agreeing to join Metro in the program, these entities waive fare revenue they would have otherwise received for trips with the pass, which negates any additional financial impact for Metro. These agencies do not contribute funds to support operating costs.
- **Everett Transit** provides access to its buses.

These entities are all participating as pilots, with participation agreements ending on December 31, 2024.<sup>42, 43</sup>

These agencies experienced minimal impacts to boardings because of the program. Boardings by transit agency and the proportion compared to overall boardings is detailed in Section A. For customers who rely on these services to get to where they need to go, access to an integrated and extensive transit network is valuable.

#### F. Proposed Program Improvements or Changes

The Executive is not recommending any program changes.

### IV. Next Actions

The subsidized annual pass is an important element of Metro’s commitment to mobility as a human right must be part of a wider effort to solve mobility challenges. At the root of mobility challenges are income inequality and regional poverty – issues that King County and Metro cannot solve alone. Nevertheless, mobility is essential to move people out of poverty and change economic and health outcomes. To that end, Metro is committed to continue prioritizing investments that connect those who need transit most to jobs, school, housing, healthcare, and recreation. Income-based, subsidized fares are a component of the solution, but a regional and reliable network that connects communities to opportunities is also necessary.

Metro’s Fares Enterprise Initiative aims to ensure that fares and programs are equitable and easy to use and administer. As transit systems in the region integrate, it is vitally important that fare strategies and regional alignment is in place to ease travel between transit systems for riders throughout the Puget Sound region. Results from the subsidized annual pass program evaluation will support the more comprehensive Human Centered Design Thinking approach toward reduced fare product simplification.

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<sup>42</sup> [Sound Transit Board Resolution No. R2022-07.](#)

<sup>43</sup> Via letter agreements executed on December 1, 2022 (Seattle Department of Transportation) and December 5, 2022 (Seattle Center Monorail).

Through this effort, Metro plans to work with the other regional transit agencies to improve program implementation, extend reduced fare product reach in an equitable way, and solve the administrative burdens experienced from the current assemblage of reduced fare offerings.

Metro's major work items in 2024 include:

- Continue enrollment of eligible customers and reenrollment of customers who still qualify after their annual transit pass has expired.
- Improve and standardize regional communication efforts with eligible people and human service agencies who serve them.
- Support DSHS in their transition back to pre-COVID operations at their Customer Service Offices, and new enrollment locations at mobile locations. Provide training and on-site support as requested by DSHS.
- Develop short how-to videos and written tools for human service agencies that refer, enroll, and renew customers in the program.
- Increase in-person community-level outreach through Public Health, Catholic Community Services, and Metro's Neighborhood Pop-Up.
- Complete the impact evaluation by finalizing an agreement with the State of Washington to access administrative data, completing data collection and analysis.
- Enhance the evaluation's qualitative component.
- Disseminate evaluation findings and develop a series of recommendations for study design and recruitment that can be used for future studies.
- Work within the agency-wide Fares Enterprise Initiative to further develop fares and programs that are equitable and easy to use and administer. Invite other regional transit agencies to participate in this effort and work with partners to consider proposals that would require regional approval.

## V. Appendices

### A. Appendix A: Motion 15600 Excerpt

B1. In recognition of the importance of the income-based fare program to the people it serves and to reflect the council's commitment to service excellence in Metro transit department operations, the executive should transmit an income-based fare program evaluation plan by June 30, 2020. Beginning June 30, 2021, through June 30, 2024, the executive should annually transmit an income-based fare program evaluation report. The income-based fare program evaluation plan should include the program goals, program areas to be evaluated including, but not limited to, the criteria listed in section B.1.a. through g. of this motion and methods for benchmarking and measure program performance. Each income-based fare program evaluation report should include, but not be limited to:

- a. the number of people served and number of trips taken using the income-based fare program during the previous calendar year and an analysis of trends in usage over time, as appropriate;
- b. the level of participation among eligible people during the previous calendar year, and an analysis of participation over time, as appropriate, including an analysis of participation by demographic categories such as income level, age, race, ethnicity, gender, geography and employment status, and a discussion of measures that could be taken to increase participation among eligible people;
- c. the cost of the income-based fare program during the previous calendar year and an analysis of trends in cost over time, as appropriate, including but not limited to the cost related to:
  - (1) fare media for the income-based fare program;
  - (2) support for human services partners, for enrollment and income verification of participants;
  - (3) lost fare revenue and farebox recovery impacts; and
  - (4) operations, including the implementation and evaluation of the program, as well as any impacts on transit operations, such as crowding, that can be attributed to the program;
- d. mobility outcomes for program participants, including but not limited to improved quality of life and access to health care, social services, education or employment, from both qualitative and quantitative evaluation methods;
- e. experiences of partner human service agencies, including impacts to their operating costs and staffing levels, and suggestions for program improvements based on qualitative and quantitative evaluation methods;
- f. participation in the program from regional partners, including, but not limited to, Sound Transit; and
- g. program improvements or changes proposed in response to the annual evaluation.



B. Appendix B: Study Design

