



KING COUNTY

1200 King County Courthouse
516 Third Avenue
Seattle, WA 98104

Signature Report

December 13, 2016

Motion 14772

Proposed No. 2016-0412.1

Sponsors Dembowski and Kohl-Welles

1 A MOTION relating to public transportation; approving a
2 report relating to options for improving access to ORCA
3 LIFT for low-income college or university students, as
4 directed by the 2015/2016 Biennial Budget Ordinance,
5 Ordinance 17941, Section 113, as amended by Ordinance
6 18239, Section 35, Proviso P9.

7 WHEREAS, in February 2016, Ordinance 18239 adopted supplemental
8 appropriations that amended the 2015/2016 Biennial Budget Ordinance, Ordinance
9 17941, and

10 WHEREAS, Ordinance 18239 approved an appropriation for capital project
11 1124456, ORCA replacement, and

12 WHEREAS, Ordinance 18239, Section 35, Proviso P9, requires the executive to
13 transmit by August 15, 2016, a report on improving access to ORCA LIFT for low-
14 income college or university students and a motion that approves the report before
15 expending \$500,000 of the funds appropriated for capital project 1124456, and

16 WHEREAS, the report is to include, but not be limited to:

17 A. A study of the feasibility of providing locations more convenient to low-
18 income college or university students to apply for ORCA LIFT cards that integrate
19 college- or university-provided transit fare credit into their ORCA LIFT cards. The study

20 shall be based on a review of current transit operational practices and on the transit
21 division outreach to college or university administrators and students, other stakeholders,
22 and members of the public;

23 B. A summary of the outreach efforts required by subsection A of this proviso;

24 C. An estimate of the number of affected students, broken out by educational
25 institution, including students for whom English is a second language;

26 D. A range of options to facilitate locations more convenient to low-income
27 college or university students at which they may apply for ORCA LIFT cards that
28 integrate college- or university-provided transit fare credit into their ORCA LIFT cards,
29 which may include any implementation of options taken by the transit division before
30 completion of the report;

31 E. Estimates of the cost for each option including any fare revenue impacts; and

32 F. A plan to timely report to the council the results of the transit division
33 implementing any of the options identified in the report.

34 WHEREAS, Metro has compiled the required information and the executive has
35 transmitted the Improving Access to ORCA LIFT and Improving Access to ORCA
36 Subsidies for College and University Students report as set forth as Attachment A to this
37 motion to the council;

38 NOW, THEREFORE, BE IT MOVED by the Council of King County:

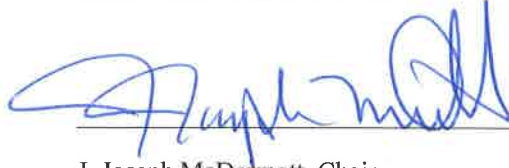
39 The council hereby approves the Improving Access to ORCA LIFT and
40 Improving Access to ORCA Subsidies for College and University Students report,

41 Attachment A to this motion, as required by Ordinance 17941, Section 113, as amended
42 by Ordinance 18239, Section 35, Proviso P9.
43

Motion 14772 was introduced on 8/22/2016 and passed by the Metropolitan King County Council on 12/12/2016, by the following vote:

Yes: 9 - Mr. von Reichbauer, Mr. Gossett, Ms. Lambert, Mr. Dunn,
Mr. McDermott, Mr. Dembowski, Mr. Upthegrove, Ms. Kohl-Welles
and Ms. Balducci
No: 0
Excused: 0

KING COUNTY COUNCIL
KING COUNTY, WASHINGTON



J. Joseph McDermott, Chair

ATTEST:



Melani Pedroza, Acting Clerk of the Council

Attachments: A. Improving Access to ORCA LIFT and Improving Access to ORCA Subsidies for College and University Students



Improving Access to ORCA LIFT and Improving Access to ORCA Subsidies for College and University Students

Response to a Proviso in Ordinance 18239 (Section 35, P9)

Prepared by King County Metro Transit

August 2016



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Improving Access to ORCA LIFT and Improving Access to ORCA Subsidies for College and University Students

Introduction

Ordinance 18239, a 2015/2016 supplemental spending measure, was passed by the King County Council in February 2016. The budget ordinance included a proviso that requires Metro to explore and to propose options for improving the accessibility of the ORCA LIFT fare for low-income college and university students. This report is the response to that proviso.

Ordinance 12839, Section 35, Proviso P9 provides:

Of this appropriation, \$500,000 shall not be expended or encumbered until the executive transmits a report on options for low-income college or university students to apply for ORCA LIFT cards at locations more convenient to their colleges or universities and integrate college- or university-provided transit fare credit to ORCA LIFT cards, and a motion approving the report. At a minimum, the scope of the study shall include community colleges and technical institutes in King County and colleges in the Seattle Colleges District. The executive shall determine any additional colleges or universities that will be considered in the scope of the study. The motion shall reference the subject matter, the proviso's ordinance, ordinance section and proviso number in the title of the motion. The report shall include, but not be limited to:

- A. *A study of the feasibility of providing locations more convenient to low-income college or university students to apply for OCRA LIFT cards that integrate college- or university-provided transit fare credit into their ORCA LIFT cards. The study shall be based on a review of current transit operational practices and on the transit division outreach to college or university administrators and students, other stakeholders, and members of the public;*
- B. *A summary of the outreach efforts required by subsection A. of this proviso;*
- C. *An estimate of the number of affected students, broken out by educational institution, including students for whom English is a second language;*
- D. *A range of options to facilitate locations more convenient to low-income college or university students at which they may apply for OCRA LIFT cards that integrate college- or university-provided transit fare credit into their ORCA LIFT cards, which may include any implementation of options taken by the transit division before completion of the report;*
- E. *Estimates of the cost for each option including any fare revenue impacts; and*

- F. A plan to timely report to the council the results of the transit division implementing any of the options identified in the report.*

ORCA LIFT Background and Program Status

Launched in March 2015, ORCA LIFT is the nation's largest reduced-fare program of its kind for lower-income riders and is showing other metropolitan regions how transit can be part of the solution to the nation's growing income inequality. People with household income of less than double the federal poverty level (as established by US Health and Human Services Department) qualify for ORCA LIFT.

Enrollment in ORCA LIFT works by partnering with Public Health – Seattle and King County, and eight human services and other governmental agencies across King County to help enroll eligible participants quickly and more comprehensively than Metro could do alone. Many of these organizations work with specific cultural and low-income populations who are already enrolling clients in other governmental programs.

Once the customer qualifies for the ORCA LIFT program, the customer receives an ORCA LIFT card registered to their name, with the same features as every ORCA card. Per Council direction and the adopted ORCA LIFT implementation plan, the ORCA LIFT fare is only available via an ORCA card with the LIFT fare type applied to it. To regularly access their ORCA LIFT fare, customers must obtain an ORCA LIFT card and regularly add value to it. This requires customers to locate and visit Ticket Vending Machines or third-party retail locations, manage their account via the internet at orcacard.com, call a transit agency call center for customer assistance, or attend an ORCA-to-GO mobile sales event which is staffed by Metro employees. The customer can then load stored value via an e-purse on their card to pay for trips one at a time, or load a discounted monthly pass that lets them take unlimited trips for an entire month. ORCA LIFT gives the customer the convenience of the ORCA card system at a fraction of the cost.

The number of qualified riders who use ORCA LIFT cards has increased each month since the program started last year. A recent survey found that 44 percent of riders have taken the bus and light rail more frequently since they received their ORCA LIFT card. Ninety-seven percent of ORCA LIFT customers report that they are satisfied with the program. Of those who previously rode the bus or Link, 48 percent usually paid cash prior to getting their ORCA LIFT card. This use of ORCA instead of cash benefits all customers by speeding up boarding and reducing travel time.

More than 3.7 million trips were taken with ORCA LIFT cards on Metro buses and Sound Transit Link light rail during the program's first year. Today, more than 30,000 King County residents have signed up for the program. And as of March 2016, ORCA LIFT cards can now be used on all Sound Transit ST Express buses and Sounder trains, covering King, Snohomish, and Pierce counties.

A. Feasibility of providing more convenient access to ORCA LIFT and ORCA account management

The process for providing ORCA LIFT cards to eligible customers involves in-person identity and income verification. Metro has worked in partnership with Public Health – Seattle & King County and eight human services agencies to establish a network of more than 50 sites across King County where customers can sign up for the ORCA LIFT program. Metro staff identified 36 colleges and universities in King County as part of the report. Several colleges in King County currently have ORCA LIFT access on site provided by Public Health – Seattle & King County. These colleges include:

- North Seattle College
- Seattle Central College
- Seattle Vocational Institute
- South Seattle College (summer only)

Most of the other colleges and universities in King County have access to ORCA LIFT verification agencies via public transportation.

Metro scheduled and delivered 27 ORCA-to-GO and ORCA LIFT verification events at colleges and universities in 2015. Events were held at Bellevue College, Highline College, Seattle Central College, Seattle University, Seattle Vocational Institute, and Shoreline College. Metro provides the colleges and universities with promotional flyers and brochures in advance of each event. Metro and the colleges and universities also promote these events on their respective websites to attract students eligible for ORCA LIFT and to manage their individual ORCA cards.

One result of the outreach effort conducted for this report (summarized in Section B) is a recognition of the need to promote the availability of ORCA LIFT and income verification sites to the college and university student population. Raising awareness of the ORCA LIFT product and how to access it will be a main element of an ORCA LIFT promotion campaign planned for fall 2016. The fall promotional campaign will include county-wide messaging such as posters on Metro buses, a multi-lingual print and radio campaign, and will have materials that are customizable for college and university campuses. In addition, Metro will increase its on-campus presence with ORCA-to-GO and ORCA LIFT at the beginning of each academic quarter at as many colleges and universities as possible.

As Metro reviews its partnerships with ORCA LIFT income verification agencies going forward, proximity to colleges and universities will be given increased weighting as a factor in selecting income verification agencies. Additionally, colleges and universities may establish their own ORCA LIFT verification and card distribution processes, as several human service agencies have, to serve their own students directly.

Metro's outreach effort also identified the need to improve the ability of college and university students to manage their ORCA accounts, specifically their ability to apply subsidies provided to them to their own ORCA account. Several colleges and universities choose to sell students ORCA cards with \$200 in e-purse value on them for \$125. Students who wish to apply the e-purse value from these cards to their own personal ORCA card, which may also be a Youth card or an ORCA LIFT card, have to present the cards to Metro staff who have access to a Customer Service Terminal (CST), either at a customer service office or an ORCA-to-Go outreach event. Metro staff then must perform a manual cash adjustment to move the funds from one card to another. Colleges and universities could make it easier for students to manage their ORCA accounts by using a different method of providing subsidies to their students. Options for making ORCA account management more convenient are described in Section B of this report.

B. Summary of outreach efforts

Metro collected information from colleges, universities, and students in two ways. First Metro sent the colleges and universities a survey to collect demographic information and information about whether and how the colleges and universities participated in the ORCA program and student transportation. Metro received very few responses to the survey (3 responded out of 29 colleges and universities that received the survey). This method was not effective in collecting the information sought for this report.

As a result, Metro pursued a second method of reaching colleges, universities, and students to collect information for this report. Metro conducted a workshop to help Metro better understand issues with the ORCA system, the ORCA LIFT program, and administering transit subsidy programs and to brainstorm solutions. Representatives from colleges, universities, students, advocacy groups, Council staff, Sound Transit, Public Health – Seattle and King County, KCDOT, and Metro participated in a workshop on June 1, 2016, at King Street Center. Participants in the workshop represented students and/or administrators from the following institutions and advocacy organizations:

- Bellevue College
- Seattle Central College
- Seattle University
- Shoreline Community College
- South Seattle College
- Transit Riders' Union
- Transportation Choices Coalition

The workshop was very effective and had several important outcomes. First, Metro had an opportunity to hear first hand from representatives from the colleges and universities, and from students, and to get a better understanding of challenges with existing arrangements. Second, , the workshop allowed for a discussion , and sharing of lessons learned. Some

institutions had resolved problems encountered by others and the workshop forum allowed for the sharing of this information. Third, the participants brainstormed near-term and long-term actions that would improve the colleges', universities', and students' participation in ORCA LIFT and ORCA account management. Outcomes of the workshop are described in Section D of this report. The outcomes include a commitment by Metro, Sound Transit, colleges and universities, and students to further collaboration to improve access to ORCA LIFT and access to ORCA subsidies for college and university students. Metro has subsequently followed up with workshop invitees—such as Green River and Highline Colleges—that were unable to attend.

C. Estimate of affected population

Metro sent a survey to the 29 institutions below, but the response rate was only 10%. In lieu of better data, information from the websites of each institution was used to compile the table below. There is a reported student population of just under 139,000 in the 29 colleges and universities located in King County listed in Table 1 below. In the United States approximately 7.8 million students attend community college either part-time or full time. According to the Association of Community College Trustees, nationally, community colleges have a Pell grant eligibility of 38 percent. With the assumption that King County is consistent with the national statistics, it is estimated that nearly 53,000 students could be eligible for ORCA LIFT.

Table 1: College and University Student Populations in King County

College/University - Public	Enrollment	International Students
Bellevue College	8,376	1,760
Cascadia College	2,873	
Green River Community College	10,991	1,397
Highline College	6,866	
Lake Washington Institute	4,809	
Renton Technical College	6,885	
Seattle Colleges		
Central	7,639	1,307
North	6,669	821
South	5,730	440
Seattle Vocational Institute	1,400	
Shoreline College	6,314	
University of Washington - main	42,451	4,158
UW Bothell	3,273	
Subtotal - public	114,276	9,883

College/University - Private - non profit	Enrollment	International Students
Antioch University Seattle	994	3
Bastyr University	1,202	
City University of Seattle	2,644	
Cornish College of the Arts	767	20
Northwest University	1,400	
Seattle Pacific University	4,117	84
Seattle University	7,817	668
The Seattle School of Theology & Psychology	275	
Subtotal - private nonprofit	19,216	775

Private - for profit	Enrollment	International Students
Argosy University	500	15
Art Institute of Seattle	2,245	37
Cortiva Institute Seattle - School of Massage Therapy	200	
DeVry University	300	
DigiPen Institute of Technology	964	
Gene Juarez Academy of Beauty	273	0
ITT Technical Institute	414	
University of Phoenix-Western Washington Campus	607	
Subtotal - for profit	5,503	52

GRAND TOTAL	138,995	10,710
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D. Options for more convenient access to ORCA LIFT and manage ORCA accounts

Metro's conversations with the colleges and universities in our region have resulted in six action items related to providing convenient transit access to area students:

1. Make more and better information on ORCA LIFT available to colleges and universities. Metro plans to promote ORCA LIFT again in the fall of 2016 and the colleges and universities pledged to help promote the program as well.
2. Better coordinate ORCA LIFT and ORCA-to-GO outreach services for fall quarter 2016 and for subsequent quarters. Metro has limited staff and has four portable ORCA-to-Go customer service terminals. While colleges and universities want to have ORCA LIFT and ORCA-to-Go available to students on campus at the start of the quarter, they understand that the limited resource must be shared. Metro will work to optimize and properly promote ORCA-to-GO and ORCA LIFT outreach among the colleges and universities.
3. Assist colleges and universities in managing student ORCA cards and subsidies. If colleges and universities choose to associate ORCA cards in a Business Account, then they can apply subsidies to specific cards via the ORCA Business Account website. However, some colleges and universities choose not to manage their subsidy programs this way. Metro staff and college and university representatives will collaborate to find the easiest ways for colleges and universities to utilize this tool to administer their transit subsidy programs.
4. Explore establishing colleges and universities as ORCA LIFT income verification and card distribution agents. There are currently five social service agencies in King County that provide income verification and card distribution for the ORCA LIFT program at no charge to the County. The colleges and universities expressed interest in exploring being trained and equipped to verify income and distribute ORCA LIFT cards. This work is similar to work they do to determine financial aid eligibility. Public Health – Seattle & King County will work with the colleges, universities, and students in a series of workshops through the fall of 2016 to explore this option.
5. Explore a standard college and university student pass program, exclusive of the Passport program and the University of Washington UPASS program. All parties expressed an interest in exploring how, within current policy, administrative, and ORCA system constraints, to define a common program to reduce administrative and procedural burdens for all and to improve access to mobility options for students. Metro will work with the colleges, universities, and students in a series of workshops through the fall of 2016 to explore this option.

6. Explore and analyze a college and university student fare type. Students and transit advocacy groups expressed interest in exploring a student fare, similar to the ORCA LIFT fare. Metro will work with the colleges, universities, and students through the fall of 2016 to explore this option.

E. Cost estimates

The first four activities listed in Section B of this report can be accomplished within existing resources. The potential costs of the last two activities, designing a common college and university student transit pass program and implementing a student fare type, will require additional definition and analysis to determine estimated or potential costs.

F. Reporting plan

Metro proposes to provide the Council with a status report of actions taken to date and on the feasibility of actions proposed for continued exploration by March 15, 2017. During the development of this report Metro also proposes engaging in meetings or workshops with interested Council staff to assist and inform the content of this report.