

## **Attachment 1: Summary of Changes to the Strategic Plan and Service Guidelines**

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### **Overview of Updates to the Strategic Plan and Service Guidelines**

The Strategic Plan and Service Guidelines are largely based on the product of two major processes, described in more detail below:

**1. The Service Guidelines Task Force** was convened in March 2015 in response to Proviso 1 of 2015/2016 Biennial Budget Ordinance 19741. Building on the work of the 2010 Regional Transit Task Force, this new task force was asked to further analyze how transit service is designed, allocated and measured, consider input from stakeholders across the region, and recommend any needed improvements.

Over eight months of work, the task force developed consensus recommendations—the result of tremendous collaboration by King County, partner cities, regional decision makers, and diverse stakeholders. The Task Force recommendations were recently sent to the King County Council and the Regional Transit Committee.

**2. The Access to Transit Study**, required by Section 3.A.1 of Ordinance 17641, identified concerns about how access to transit is defined and measured, and it considered how Metro can work with local jurisdictions and other partners to improve access. Phase II of this report is due to the King County Council on December 31, 2015.

### **Specific Proposed Changes**

The specific proposed changes to the Strategic Plan and Service Guidelines, grouped by the source or reason for the changes, are summarized below (excluding minor updates and revisions for clarity).

#### **Strategic Plan**

##### *Service Guidelines Task Force recommendations*



1. Revise strategies 2.1.1 and 2.1.4 to support the expansion of Metro’s alternative services by developing an extensive range of such services, serving new markets, and developing partnerships.



2. Revise strategies 3.1.1 and 3.1.2 to support improved mobility through the expansion of public-private partnerships, partnerships with private transportation operators, and partnerships that encourage transit options for low-income workers.

3. Revise strategy 6.1.1 to be consistent with proposed revisions to the Service Guidelines that clarify the purposes for which the guidelines are used.

##### *Access to Transit Study*

4. Modify strategies 3.2.2, 3.2.3, 3.3.1, and 3.3.2 to better characterize how Metro will value park-and-rides and all types of access to transit.

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5. Modify objective 3.2 and strategies 3.2.2 and 3.2.3, and add strategy 3.2.4, to address how Metro will facilitate convenient and safe access to transit by all modes.
6. Change performance measures to better assess how well people can access the transit system.

*Clarifying policy intent*

7. Update objectives 4.1 and 4.2 to reflect the greenhouse gas emissions reduction targets in the County’s Strategic Climate Action Plan.
8. Update out-of-date information in Strategy 6.2.1.
9. Update strategy 6.3.1 to more clearly describe what Metro does when revenue-backed service expires.

*Updates and edits for clarity*

10. Substantial updates and edits in the Executive Summary and Introduction sections to make this policy document relevant within the current context.

**Service Guidelines**

*Service Guidelines Task Force recommendations*



1. Modify the way Metro evaluates corridors to better reflect productivity, social equity and geographic value. This proposed change would have the effect of increasing target service levels and the measured overall need for transit services.



2. Change the definition of “low income” used in setting target service levels from 100% of the federal poverty level to 200% of the federal poverty level, in line with the ORCA LIFT program and many other human service programs.



3. Establish a minimum service level of every 60 minutes for corridors and routes.



4. Provide greater protection for peak-only services in the event of major service reductions.



5. Modify Metro’s service types so that comparable services are measured against one another.



6. Expand the description of Metro’s planning and public outreach process and how the agency engages and works with the community.



7. Expand the description of the Alternative Services Program as a way to meet diverse needs.

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8. Expand the descriptions of how Metro will partner with communities and with private partners to build the best transit network possible.



9. Expand the description of the different factors Metro considers when making investments.



10. Give more consideration to the relative impacts to all parts of the county when making service reductions.

### *Clarifying policy intent*



11. Remove cost/farebox recovery from the service levels analysis because it does not reflect actual farebox recovery and is a redundant measure.



12. Modify the way Metro measures passenger crowding from a measure based on seats to one based on square footage in buses.

13. Modify the corridor list to match up the current list with the service Metro provides. Corridors have changed due to system changes (restructures, adding, deleting service) over the past four years.

### *Updates and edits for clarity*

14. Rewrite of the Introduction and first section, and additional edits throughout to improve the organization and clarity of this complex technical document and to update with the current context and with current data.

### **Task Force Recommendations not included in Strategic Plan and Service Guidelines**

In addition to the recommendations that are incorporated into the Strategic Plan and Service Guidelines, described above, the Task Force also recommended that more funding for our network and for our alternative services program is necessary for Metro to meet existing demands for transit service, which far outweigh current available resources. The Task Force also recommended that Metro identify a network of transit services through the Long-Range Plan that can be supported by stakeholders throughout King County. The recommendations that are not incorporated into the Strategic Plan and Service Guidelines will be addressed through the biennial budget process and through Metro's first Long Range Plan, due to Council in June, 2016.

The remainder of this attachment includes a matrix of specific changes to both the Strategic Plan and Service Guidelines as well as a description of where each of the Task Force recommendations was included in the two documents.

Component of Strategic Plan		Source				Additional Information			
Section	Changes	Service Guidelines	Task Force	Access to Transit	Policy Intent	Clarity & Updates	Current Plan Page #	Transmitted Plan Page #	Task Force Principles and Recommendations
General	Letter from General Manager				X	--	--	--	
	Mission and Vision				X	i	1-2		
	Executive Summary				X	i-viii	4-5		
Chapter 1: Introduction	Background and Context				X	1-3	12-14		
	Strategic Planning				X	3-4	21-23		
	Challenges and Opportunities				X	4-10	14-20		
	Strategic Plan Development				X	10-11	21-23		
	General				X	13-42 15-16	25-53 26-27		
Chapter 2: A Pathway to the Future	Goal 1: Safety								
	Goal 2: Human Potential		X		X	17-19	28-31		P1, C
	Goal 3: Economic Growth and Built Environment		X			21-22	33-34		P9, D.A, D.B, D.D, D.E
				X		--	35-37		
			X			22-23	35-36		
			X			23	35		
			X			23	36		
			X			23	36		
					X	24	37		
	Goal 4: Environmental Sustainability			X		25-26	38-39		

Section	Changes	Service Guidelines	Task Force	Access to Transit	Policy Intent	Clarity & Updates	Current Plan Page #	Transmitted Plan Page #	Task Force Principles and Recommendations
Chapter 2: A Pathway to the Future	Goal 5: Service Excellence	- No substantive change - Clarifying text edits (5.1.1, 5.1.3, 5.2.1) - Update language to be consistent with revised Service Guidelines (6.1.1)	X		X	27-29	40-42		
	Goal 6: Financial Stewardship	- Removed information about the 2009 Audit (6.2.1) - Better describe Alternative Services products and connections - Revise revenue-backed service language to reflect current practices (6.3.1) - Clarifying text edits (6.2.3, 6.2.4, 6.3.2)		X	X	31	44		
	Goal 7: Public Engagement and Transparency	- No substantive change - Clarifying text edits (7.1.1, 7.2.1)			X	32	45		
	Goal 8: Quality Workforce	- No Change				33	44-46		
	General	- Reformatting text edits (6.2.3, 6.2.4, 6.3.2)		X		33-34	45-47		
	Goal 1: Safety	- Reformatting text edits				36-38	48-50		
	Goal 2: Human Potential	- Reformatting text edits				39-41	51-53		
	Goal 3: Economic Growth and Built Environment	- Reformatting text edits				43-50	54-59		
Chapter 3: Plan Performance Monitoring	Goal 4: Environmental Sustainability	- Access to Transit revisions: remove of 2 mile drive to P&Rs, add measures for proximity to frequent service; add Accessibility measures re: number of jobs and households with access via transit; add separate mode share measures	X			44, 45	55, 56		B.B
	Goal 5: Service Excellence	- Access to Transit revisions: add bike locker utilization measure and capacity and use at P&R served by frequent service		X		44, 45	55, 56		
	Goal 6: Financial Stewardship	- No Change				44, 46	55, 57		
	Goal 7: Public Engagement and Transparency	- No Change				44, 46	55, 57		
	Goal 8: Quality Workforce	- No Change				44, 47	55, 57		
	General	- Task Force revisions: add Alternative Services cost measures and clarifying updates	X		X	44, 47	55, 57-58		C.F
	Goal 1: Safety	- No Change				44, 48	55, 58		
	Goal 2: Human Potential	- No Change				44, 48	55, 58		

Section	Changes	Service Guidelines	Task Force	Access to Transit	Policy Intent	Clarity & Updates	Current Plan Page #	Transmitted Plan Page #	Task Force Principles and Recommendations	
Service Guidelines	General	<ul style="list-style-type: none"> <li>- Restructured and created defined sections for improved understanding</li> <li>- Clarifying edits throughout</li> <li>- Step 1: Initial Target Service Level                             <ul style="list-style-type: none"> <li>o Productivity: add park &amp; ride stalls</li> <li>o Social Equity: redefine low-income from 100% to 200% of the federal poverty level; add gradation to better value low-income and minority populations</li> <li>o Geographic Value: add gradation to better value centers</li> </ul> </li> <li>- Step 2: Adjust service levels                             <ul style="list-style-type: none"> <li>o Farebox Recovery: Removed estimated farebox recovery from analysis</li> </ul> </li> <li>o Load Factor: Updated measure to reflect area based measure</li> </ul>			X	--	1-3			
	Set Target Service Levels						SG-1, 4, 6	5-8	P5, A.B	
							--	6-7	P6, A.B.3	
				X			SG-4, 6	6-7	A.B.2	
							SG-4-6	6-7	P4, P7, A.B.1	
	Evaluate and manage system performance				X		SG-7-8	9		
					X		SG-7-8	9		
			<ul style="list-style-type: none"> <li>- Target Service Level                             <ul style="list-style-type: none"> <li>o Revise minimum service level to hourly (will identify need for corridors with worse than 60 minute frequency)</li> </ul> </li> </ul>				SG-9	11	A.B.4	
			<ul style="list-style-type: none"> <li>- Step 3: Peak-Only Service                             <ul style="list-style-type: none"> <li>o Add language to protect peak-only service in a reduction scenario</li> </ul> </li> </ul>	X			SG-8	10	A.A	
	Restructures		<ul style="list-style-type: none"> <li>- Revise Service Types                             <ul style="list-style-type: none"> <li>o Update service types to reflect task force recommendations of Urban, Suburban, and Demand Area Response Transit and Shuttles</li> </ul> </li> <li>- Revise Crowding Measures                             <ul style="list-style-type: none"> <li>o Update measure to reflect area based measure; maintain 20 Min Standing Load</li> </ul> </li> </ul>				SG-10	14-15	P1, P2, P5, A.A	
		<ul style="list-style-type: none"> <li>- Clarifying text edits to reflect changing corridors and integration with the long range plan</li> </ul>			X	SG-12-13	21-22			

Section	Changes	Service Guidelines	Task Force	Access to Transit	Policy Intent	Clarity & Updates	Current Plan Page #	Transmitted Plan Page #	Task Force Principles and Recommendations
Service Guidelines	Service Design	- Added minimum service level of at least every 60 minutes for routes - Clarifying text edits	X			SG-14-17	17-20	A.B.4	
	Planning and Outreach Process	- Reflect recommendations from task force - Better explain Metro's current processes	X			SG-21	27-28	B	
		o Better understand rider origins and destinations	X			SG-21	28	B.A	
		o Better engage the public to understand the needs of riders	X			SG-21	28	B.C	
	Alternative Services	o Better communicate the schedule for service changes throughout the county	X			SG-21	27-28	B.D, B.E	
		- Added a new section to reflect task force recommendations and expanded program	X			--	23-24	P3, C, C.H	
		o Allocation criteria	X			--	23-24	C.A, C.C	
		o Community partnerships	X			--	24	C.E, C.G	
	Partnerships	o Performance evaluation	X			--	24	C.F	
		o Conversion to fixed-route	X			--	24	C.A	
- Reflect task force recommendation for clarifying partnership program		X			SG-18	25-26	P9, D.A, D.B, D.D		
Using the Guidelines	- Add consideration for re-ordering investments	X			SG-17	29	B.F		
	- Revise peak-only reductions	X			SG-19-20	31	A.A		
	- Add consideration of the relative impacts around the county	X			--	30	P7		
	- Provide more structure around exceptions and considerations	X			SG-20	30	C.B		
	- Add information on transparency and clarity	X			--	29-33	B.D, B.E		
Corridor list	- Add connection to LRP	X			--	29-30	E.C		
Glossary	- Revised corridor list to match up with changes to service over past five years				SG - 24	36-38			
***NEW**	- Added glossary of terms to provide clarity, transparency, and better understanding of service guidelines	X							

## II. Principles and Recommendations

The task force members discussed and agreed on a set of broad principles and a set of specific recommendations.

### A. Principles

The Service Guidelines Task Force developed the following principle statements to help guide Metro's development of policy changes to the Service Guidelines, and the Strategic Plan and other Metro planning efforts.

- P1 • **Different parts of the county have different travel demands.** The Service Guidelines Task Force recognizes that transit mobility needs to take different forms throughout King County and acknowledges that a different structure of services types may help align transit service solutions with these needs. This will require a more refined recognition of the different land use patterns in the county and the purposes of that transit service.
- P2 • **Measure performance of routes against similar services.** The current guidelines have two service types, and all services within those two service types are evaluated equally against each other. However, the cost and demand characteristics of different types of service are inherently dissimilar.
- P3 • **Right-size service and seed new markets.** Consider the range of service types to enhance services to lower density communities and seed new markets. Some greater emphasis in alternative services should be placed on supporting new markets where land use patterns, job and population growth, and infrastructure investments suggest opportunities for an emerging transit corridor.
- P4 • **Create better connections between centers.** Transit services should help support mobility between non-Seattle centers and to connect people to jobs, particularly for low-wage job centers throughout King County. To accomplish this goal there needs to be a better understanding about the origins and destinations of both current and potential riders.
- P5 • **Maintain and improve services that meet productivity objectives.** Making adjustments to the Service Guidelines will create some tradeoffs in the level of service provided throughout the system. Changes to the Guidelines must continue to focus on making each of the different service types more productive. Productivity will result in higher ridership and fare revenues, and lower cost per rider.
- P6 • **Maintain and improve services that meet social equity objectives.** Social equity should be a key consideration in maintaining, improving, and allocating service. Access to transit is a crucial determinant in social and economic opportunity, health outcomes, and affordable housing choices. King County Metro should find opportunities to better serve traditionally underserved, transit-dependent and isolated communities, such as those with limited English proficiency, low-income and no-income populations, people of color, people with disabilities, seniors, and those



with limited transportation options (within the context of applicable federal laws, such as Americans with Disabilities Act [ADA] and others).

- P7** • **Maintain and improve services that meet geographic value objectives.** Each part of the county should feel value for the transit services it receives. Those services will not always be in the form of fixed-route scheduled service. Metro may deploy a variety of service types to create value throughout the county. When reducing service, Metro should consider the relative impacts to all areas of the county and work to minimize or mitigate significant negative impacts in any one area.
- P8** • **The demands for transit service far outweigh current available resources.** There are considerable unmet needs across the transit system – both as defined by the Service Guidelines in the near term and as identified by the PSRC and addressed in the King County Metro Long Range Plan now under development.
- P9** • **Value all forms of partnerships, including direct financial support, improved transit speed and reliability, and with cities that make land use and infrastructure decisions that would support transit access and ridership.** Land use and traffic operations are critical to transit success, and jurisdictions control both. Jurisdictions should incorporate transit-supportive land use and transit operating priorities in planning and development. Metro/King County should emphasize partnership opportunities and consider funding to incentivize those opportunities.

## B. Recommendations

The Service Guidelines Task Force recommends the following changes and actions related to the Metro Service Guidelines, and other Metro service policies and programs. The task force understands that Metro plans to integrate many of these recommendations into updates to its Strategic Plan, Service Guidelines, and Long Range Plan.

- A** • Make changes to the Service Guidelines:
  - A.A** ○ Modify service types to create a peak policy emphasis creating greater protection in future reduction scenarios for peak-only service; create a new service type category for Dial-a-Ride (DART) and Community Shuttle services; and change the names of the other categories of service to Urban and Suburban.<sup>5</sup>
  - A.B** ○ Better reflect geographic value and social equity when reducing service and making service investments per the service guidelines.<sup>6</sup>
    - A.B.1** ■ Revise the point system to allow for a scaling of points for geographic value to place more value on centers.<sup>7</sup>
    - A.B.2** ■ Revise the point system to allow for a scaling of points for social equity. Maintain the value of social equity corridors to the system.

<sup>5</sup> See Appendix 3, slide titled “Service Type Option 5: Peak Policy Emphasis.”

<sup>6</sup> See Appendix 4: Key Assumptions Behind Task Force Recommendations.

<sup>7</sup> Centers refers to PSRC-designated regional growth centers, PSRC-designated regional manufacturing/industrial centers, and Metro-identified transit activity centers. See the Glossary in Appendix 5 for further definition.

- A.B.3
  - Add consideration for all park-and-rides into the analysis.
- A.B.4
  - Develop minimum service standards for each service type.
- B
  - B.A
    - Make changes to the planning process:
      - Use the service planning and community engagement process to more thoroughly and explicitly address issues regarding origin and destination, including frequency of service. Discussions about origins and destinations should be part of ongoing community outreach (see recommendation below), not just when service reductions or additions are being planned.
  - B.B
    - Develop and implement a mobility metric to assess how well connected centers are to the jobs and households across King County, and the time it takes to travel to/from households and centers. Use this metric to enhance the connectivity of the transit network over time.
  - B.C
    - Use the planning process to better identify the needs of transit riders and potential riders, including traditionally isolated or disadvantaged communities, such as those with limited English proficiency, low-income and homeless populations, people of color, people with disabilities and Access users, youth, elderly people, and those who are currently unserved or underserved by transit.
  - B.D
    - Increase transparency of Metro’s process and help jurisdictions plan for the future by conducting regular outreach throughout the county and integrating the Service Guidelines with Metro’s Long Range Plan.
  - B.E
    - Better communicate the schedule or timeline for when Metro will be making changes in different areas of the county, well in advance of those anticipated changes. This schedule could be established as part of the implementation of an approved Long Range Plan.
  - B.F
    - When making investments in the transit network, Metro will consider regional planning efforts, changes to the transportation network and productivity, geographic value and social equity impacts.
- C
  - C.A
    - Enhance the alternative services program:
      - Since Metro has a broad suite of products and services, is an industry-leader in its alternative services program, and has demonstrated that alternative services cost less to provide than fixed route services, the alternative services program should be expanded to better meet mobility needs of King County. The recent budget action adding new resources for alternative services for 2015/16 was a good start. Alternative services may be used to address several system needs not being met by current transit services: (1) replace poorly performing, fixed-route services under certain circumstances; (2) provide better connections between centers; (3) serve rural communities; and (4) serve emerging markets to “seed” potential new routes.
  - C.B
    - Metro will consider redesigning and reallocating services and/or using alternative services to preserve mobility in individual communities. This approach should be used when looking for efficiencies within the network and prior to or in connection with

reducing service. By using this approach, Metro will attempt to mitigate the loss of service to communities.

- C.C**
  - Use the alternative services community planning process to better identify the needs of transit riders and potential riders, including traditionally isolated or disadvantaged communities, such as those with limited English proficiency, low-income and homeless populations, people of color, people with disabilities and Access users, youth, elderly people, and those who are currently unserved or underserved by transit (within the context of applicable federal laws, such as Americans with Disabilities Act [ADA] and others).
- C.D**
  - Significantly increase funding support to plan and deliver more alternative services where fixed-route service is not cost effective. The range of alternative services could include Dial-a-Ride (DART), community shuttle, van pool, TripPool, car pool, ride share, bikeshare, and partnerships with private transportation providers. The funding support should not come at the expense of existing efficient, productive services.
- C.E**
  - Enhance the planning for alternative services by facilitating discussions between municipalities, employers and residents to identify unmet needs and opportunities for alternative services and partnerships.
- C.F**
  - Create a new metric for measuring performance of alternative services and differentiate the types of alternative service in evaluating their performance.
- C.G**
  - Explore opportunities to further integrate private service providers as a way to augment the Metro-provided alternative services.
- C.H**
  - Expand and enhance the van pool program as part of the Alternative Services program, specifically the TripPool component of Alternative Services. Consider modifications to increase the subsidy for TripPool services that extend transit services. Metro should explore whether a lower fare could increase the demand for TripPools. Increase promotional efforts including short-term fare incentives to expand TripPool program.
- D**
  - Make changes to partnerships and land-use initiatives:
    - D.A**
      - Metro will actively collaborate with private parties and communities to explore public - private partnerships that: (1) are mutually beneficial to the agency and customers; (2) extend service in complementary ways to current fixed route service; (3) extend mobility benefits to communities that have corridors below their target service level; and (4) enable more service hours, or extend service efficiencies. Examples could include (but are not limited to) integrated planning for private employer shuttle services, incentives for ORCA distribution to disadvantaged populations, and lease agreements for private service access to public Park and Rides.
    - D.B**
      - Identify potential new community partnerships that would support transit options for low-income workers. Work with employers to identify service options.
    - D.C**
      - Develop and implement a strategy that utilizes Park and Ride resources more effectively and adds capacity. Increase management of Park and Rides, including better utilization of current facilities through parking permit programs, increasing enforcement, as well as making modest near-term investments (e.g., re-striping and/or evaluating effectiveness of current leased parking lots/spaces and considering additional spaces). In addition,

develop plans for future investments in new or expanded park and ride capacity (exploring both ownership and leased options) in concert with other partners (FTA, WSDOT, Sound Transit, local jurisdictions, or private companies).

- D.D** ○ Work with jurisdictions to create investments that improve service, attract transit riders, and achieve land use goals that support transit services.
- D.E** ○ Continue and expand engagement with private transportation operators (employee and residential shuttles, transportation network companies, taxis, and other commercial transportation entities) to enable complementary use of Metro services and facilities with those operators.
- E** • Support new funding, continued operational efficiencies, and a vision for the future of transit service in King County:
  - E.A** ○ There is a need for new resources (e.g., consideration of taxes, fees and fare revenues) to support the growth of transit services valued by all parts of the county. To achieve this goal Metro must continue its work focused on transparency, efficiency and accountability.
  - E.B** ○ Identify a network of transit services through the Long Range Plan that can be supported by stakeholders throughout King County. This network will include new transit corridors and connections between centers. The network will include both fixed-route service as well as a variety of alternative services, products and ADA Paratransit, depending on the diverse travel needs of the local community. This network will be a reflection of local jurisdictions' planning efforts.
  - E.C** ○ Develop a policy proposal to integrate the values of the Service Guidelines into the long-range planning process and resulting plan. The Long Range Plan should reflect productivity, social equity, and geographic value principles identified by the Strategic Plan and the task force. It should also describe how Service Guidelines investment priorities interact with the expansion of the transit network, as identified in the Long Range Plan. As a result, Metro will be able to better prioritize investments in the near and long-term.