

**2019/2020 King County Council
Budget and Fiscal Management Committee**

PROVISO/ER FORM

Panel Recommendation ____ Reconciliation ____ Chair Striker ____

Panel:	<i>Physical Environment</i>
Appropriation Name:	<i>Transit</i>
Exec Ordinance Section:	<i>107</i>
Analyst:	<i>Krekel-Zoppi, Bourguignon, Carlson</i>

EXPENDITURE RESTRICTION ERX:

Of this appropriation, \$900,000 shall be expended or encumbered solely for staff, consultant resources and services to develop an income-based fare program implementation plan required by Proviso Px of this section, and to develop an income-based fare program.

PX PROVIDED THAT:

Of this appropriation, \$1,000,000 shall not be expended or encumbered until the executive transmits an income-based fare program implementation plan and a motion that should acknowledge receipt of the income-based fare program implementation plan and the motion is passed by the council. The motion should reference the subject matter, the proviso's ordinance, ordinance section and proviso number in both the title and body of the motion and a motion.

A. The income-based fare program implementation plan shall be informed by:

1. Input from an income-based fare stakeholder group convened by Metro, with input from the executive and council, that includes participants representing, but not limited to, the

following: low-income populations, communities of color, immigrants and refugees and limited-English-speaking populations; youth; students in postsecondary, job training and apprenticeship programs; affordable-housing residents; low-income employees; and human service providers.

The stakeholder group should provide input on: barriers to accessing transit for low-income individuals; program alignment with Metro's policy objects; pricing; eligibility; verification and other business processes; funding and partnership opportunities; and program evaluation;

2. Guidance from academic or private sector experts in designing and evaluating programs to improve economic opportunities for low-income individuals;

3. Data and market research on the transportation needs and access barriers of low-income populations, communities of color, and limited English speaking populations in Metro's service area; and

4. King County's Equity and Social Justice Strategic Plan.

B. The income-based fare program implementation plan shall include:

1. A description of an income-based fare program, including, but not limited to:

a. at whom the program would be targeted, including income eligibility and demographics;

b. how the program would be designed, including fare media to be used and income-verification methods;

c. estimated program costs and proposed funding sources and partners. Proposed funding of the program shall adhere to Metro fund management policies including maintaining a farebox recovery minimum of twenty-five percent.

d. Potential policy changes that would be needed to implement an income-based fare program.

e. How the program would be marketed to eligible populations, including enrollment goals and regular performance reporting.

f. how Metro will partner or seek partners to market the program, enroll eligible populations, and share program costs. The program should be coordinated with human service provider agencies in order to streamline participants' access to a range of income-based services; and

g. how the program is proposed to interface with existing fare programs such as ORCA LIFT, the human services ticket program and the passport and business choice account programs;

2. A description of how the income-based fare program would be implemented in phases, with phase 1 launching to eligible populations in 2020 and phase 2 providing further expansion and adjustments to the program in 2021 based on evaluation of phase 1;

3. A description of how the program will be evaluated, in both phase 1 and long-term, including collecting data on rider demographics and travel needs and developing performance goals and reporting. Plans for evaluating phase 1 of the program shall include a discussion of how the evaluation will inform proposed changes to the program to be implemented in phase 2; and

4. A discussion of how the income-based fare program will be integrated with the ORCA system, including the financial, policy or technological barriers to implementing an income-based fare program within the ORCA system and the potential for future enhancements to an income-based fare program with implementation of Next Generation ORCA.

The executive should provide an oral briefing to the mobility committee, or its successor, on the progress of developing the program by June 30, 2019, and should file the

income-based fare program implementation plan and a motion required by this proviso by September 30, 2019 in the form of a paper original and an electronic copy with the clerk of the council, who shall retain the original and provide an electronic copy to all councilmembers, the council chief of staff and the lead staff for the mobility committee, or its successor.