

Introduction to Metro Policy Updates

Regional Transit Committee
October 16, 2019



Metro's policies guide our actions

- Metro's policy documents (Strategic Plan, Service Guidelines, Long-range Plan) help us carry out our mission
- They guide our actions and measure our progress
- Metro's policies cover day-to-day operations as well as planning for the future
- Our policies are developed through community engagement, then reviewed, revised and adopted by the Regional Transit Committee and King County Council



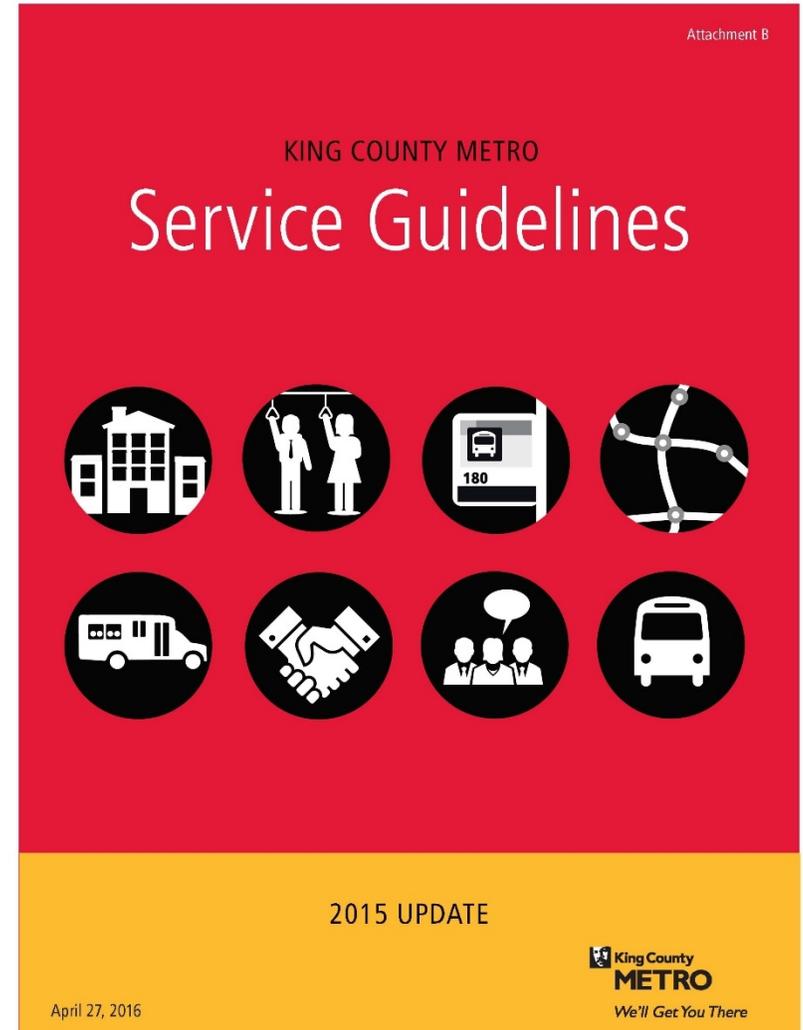
Strategic Plan

- Strategic Plan outlines Metro's goals, the strategies and objectives to achieve them, measures to determine if we are succeeding
- Goals are:
 1. Safety
 2. Human potential
 3. Economic growth & built environment
 4. Environmental sustainability
 5. Service excellence
 6. Financial stewardship
 7. Public engagement & transparency
 8. Quality workforce



Service Guidelines

- Service Guidelines guide day-to-day delivery of transit service
- **Set targets** for the level of transit service based on:
 - Productivity (number of households, jobs)
 - Social Equity (% passengers from minority, low-income census tracts)
 - Geographic value (ways to make connections)
- **Evaluate** how well routes are doing
- **Add, reduce or change** service based on priorities
 1. Overcrowding
 2. On-time performance
 3. New service to connect activity centers
 4. Route productivity



METRO CONNECTS

- METRO CONNECTS is our adopted vision for the future, based on regional growth plans
- It aims to increase bus service hours by 70% between 2015 – 2040
- 2040 network would be larger with better access throughout the county, including for communities of color and low-income people
- The plan covers capital investments (bus bases, roadway improvements) and partnership opportunities
- METRO CONNECTS is not fully funded, so additional regional funding is needed



Ferry Plan 2014-2018

- Approved by the King County Ferry District
- Sets vision, goals, strategies, and measures for water taxi service
- Included a situation assessment that guided move to Pier 50
- Included a financial assessment
- Marine Division is currently developing a modal plan
- Marine is now part of Metro, must be integrated into Metro's policies



King County policy guidance

- King County has a number of adopted policies that inform Metro’s policies and actions
 - **Equity and Social Justice Strategic Plan:** helps identify how mobility services could better serve where needs are greatest
 - **Strategic Climate Action Plan:** sets targets for greenhouse gas emissions reduction and outlines Metro’s role in meeting the targets
 - **Comprehensive Plan:** sets land use policies for unincorporated area, plus countywide policies for services
 - **Metro Fund Management Policy:** sets farebox recovery floor, reserve policies

EQUITY AND SOCIAL JUSTICE STRATEGIC PLAN 2016-2022

strategic CLIMATE ACTION PLAN November 2015

Attachment A to Ordinance 18427, as amended by Ordinance 18823 and Ordinance 18810

Adopted December 5, 2016
Updated December 4, 2017
Updated October 29, 2018

2016 King County Comprehensive Plan

King County
Office of Performance Strategy and Budget

Ordinance 18321 Attachment A

FUND MANAGEMENT POLICIES FOR THE PUBLIC TRANSPORTATION FUND

I. **General Financial Practices**

A. **General Financial Practices** – The fund management policies for the Public Transportation Fund serve to ensure that the Transit Division uses prudent financial planning to meet the policies and priorities of the adopted Strategic Plan for Public Transportation and the King County Metro Service Guidelines. The Transit Division will manage its finances to fund expenditures in the following order: (1) debt service; (2) operation of the current transit system levels,¹ including asset maintenance and replacement; (3) maintenance and replenishment of reserves; (4) new transit service and capital investments necessary to achieve All Day and Peak Network priorities identified by the King County Metro Service Guidelines, and new transit service and capital investments necessary to achieve elements of the long range vision identified in Metro Connects.

B. **Fund Structure** - Metro Transit manages the Public Transportation Fund as an enterprise through five distinct subfunds: Operating, Capital, Bonds, Revenue Stabilization, and Revenue Fleet Replacement.

1. The Operating Subfund supports the ongoing operation of Transit services, including but not limited to bus, paratransit, vanpool/vanshare, and various contracted services. It includes direct operating labor and non-labor costs, administrative costs, and indirect and overhead costs.
2. The Infrastructure Capital Subfund supports capital infrastructure projects, including the planning, design, acquisition, preservation and replacement of infrastructure and other capital items as needed to support Transit operations.
3. The Bond Subfund supports annual debt service payments for debt-financed Transit assets.
4. The Revenue Stabilization Subfund holds fund balance to offset impacts of economic downturns.
5. The Revenue Fleet Capital Subfund supports new and replacement revenue fleet purchases.

C. **Financial Planning** – With each biennial budget, the Transit Division will provide a financial plan and cash flow projection of six years or more, estimating operating expenses and capital requirements of the current system, operating and capital expenses of sustainable system expansion, reserves, and debt service for all of its subfunds. For any operating grants, the financial plan will identify the costs of continuing to operate the service after the grant ends.

D. **Capital Planning** – At a minimum, the Transit Division will maintain a rolling 10-year plan to identify and prioritize needed new facility infrastructure and

¹ including passenger loads and reliability investments as prioritized in the King County Metro Service Guidelines.

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Next Steps: Mobility Framework

- The Mobility Framework report and recommendations will be transmitted to Council at the end of this month
- RTC and Council will review and adopt recommendations
- Motion accompanying recommendations will direct Metro to update its policies
- Policy updates will be guided by the Mobility Framework recommendations

King County Metro Mobility Framework

Mobility Framework Report

October 2019



UPDATES: Strategic Plan

Updates will:

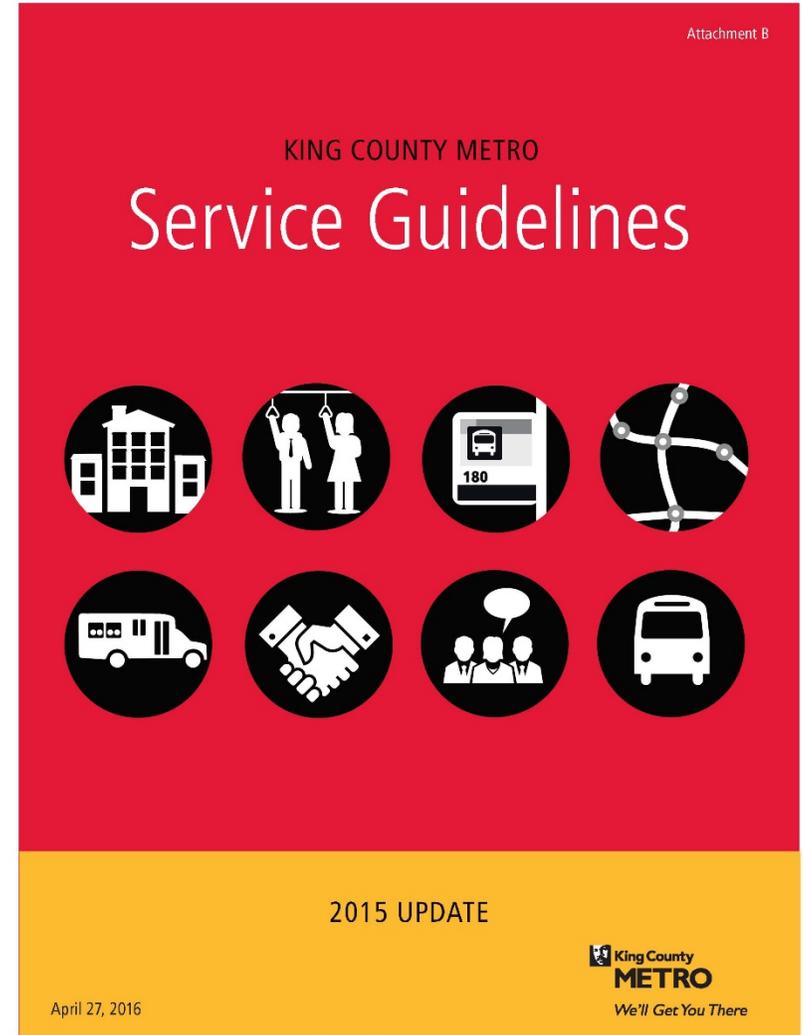
- Align goals, strategies and objectives with the Mobility Framework's Guiding Principles and recommendations
- Include Marine Division
- Update information on innovation
- Simplify measures, align measures with key policy drivers, and make them more transparent (online dashboard)



UPDATES: Service Guidelines

Updates will:

- Align targets and priorities with Mobility Framework
- Include Marine
- Include innovative mobility services
- Align with the METRO CONNECTS network



UPDATES: METRO CONNECTS

Updates will:

- Update costs for inflation, population growth, ST3, and Metro planning efforts (RapidRide, speed & reliability)
- Include Marine
- Incorporate Mobility Framework recommendations
- Set priorities for implementation of the METRO CONNECTS network with or without new regional funding
- Clarify partnership policies (Motion 15094)



Potential Timeline for RTC Engagement

Month	Action and Topic
October 2019	Review existing policy documents
November 2019	Review/adopt Mobility Framework Recommendations Summary (TBD)
December 2019	King County Council review/adopt Mobility Framework Recommendations Summary (TBD)
January 2020	Discuss Strategic Plan and performance measures updates
February 2020	Discuss updated METRO CONNECTS costs and prioritization
March 2020	Discuss Service Guidelines updates
July 2020	Begin review of transmitted updated policy documents (Strategic Plan, METRO CONNECTS, Service Guidelines)
November 2020	King County Council adoption of policy documents

Closing and Questions