



King County

KING COUNTY REGIONAL TRANSIT TASK FORCE

Final Report and Recommendations

October 2010





King County

FOR INFORMATION, CONTACT:

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November 5, 2010

Dow Constantine, King County Executive
King County Chinook Building
401 5th Ave., Suite 800
Seattle, WA 98104

King County Council Members
516 Third Ave., Rm. 1200
Seattle, WA 98104

Dear Executive Constantine and Council Members:

With this letter we are transmitting to you the final report of the Regional Transit Task Force. The issues you asked us to consider regarding the future of transit service in King County are vital to the growth of our respective communities and the quality of life for county residents.

We have worked hard for seven months to craft these recommendations. We represent many diverse perspectives, but through our discussions we developed agreement on a policy framework that we believe is in the best interests of all King County residents. When we began this process we set a high bar for ourselves – to attempt to reach unanimous consensus on our recommendations. We are pleased that the following report indeed reflects the unanimous approval of the Task Force.

We would be happy to serve as a resource in any way we can as you consider these recommendations. We look forward to your review and hope that you and Metro will be able to establish an aggressive schedule for the adoption and implementation of these recommendations. We would like to request that you convene the Task Force in mid-2011, after Council action on Metro's Comprehensive and Strategic Plans, to provide us with an update on the follow-up to this work.

Thank you for the opportunity to serve on the task force. It has been challenging, but very rewarding. We also thank Metro staff for their responsiveness and support of our efforts throughout the process.

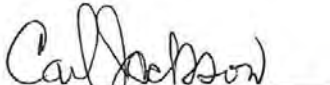
Sincerely,

Regional Transit Task Force Members

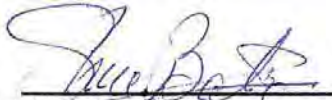
(signatures on reverse)

Regional Transit Task Force Members:



Chuck Ayers

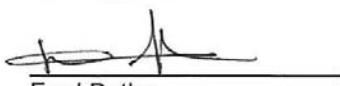

Carl Jackson


Tom Rasmussen


Shiv Batra


Rob Johnson



Carla Sautter


Fred Butler


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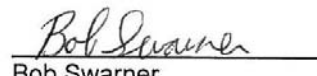

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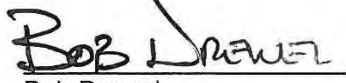

Josh Kavanagh

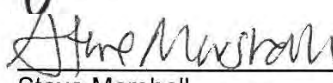

Jim Stanton

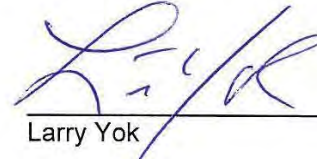

Grant Degginger


Jane Kuechle

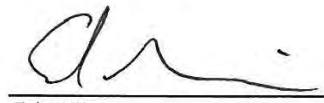

Bob Swarner

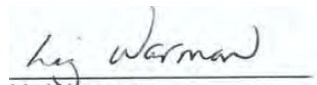

Bob Drewel


Steve Marshall

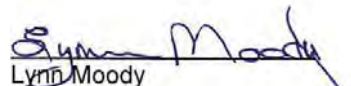

Larry Yok

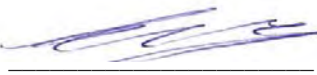

Chris Egger


Ed Miller


Liz Warman


David Freiboth



Lynn Moody

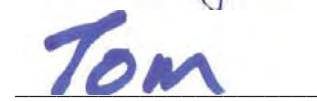
**Non-Voting
Ex Officio Members:**

Gene Baxstrom


Noel Gerken


Estela Ortega


Kevin Desmond


Chris Hoffmann


Tom Pierson


Greg Walker

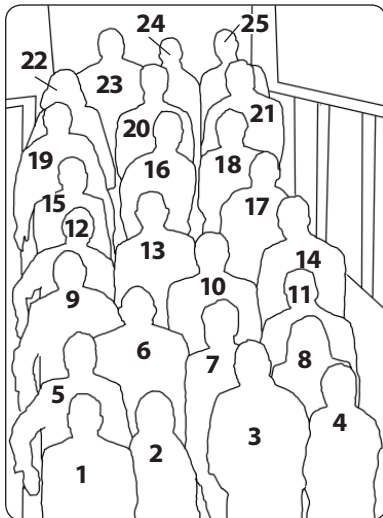
Regional Transit Task Force Members

Name	Organization	Representation Category
Chuck Ayers	Cascade Bicycle Club	Regional Interests – Environmental
Shiv Batra		Riders – East
Gene Baxstrom*	Joint Transportation Committee	Ex Officio
Fred Butler	Councilmember - Issaquah	Elected Officials – East
Suzette Cooke	Mayor - Kent	Elected Officials – South
Grant Degginger	Councilmember - Bellevue	Elected Officials – East
Kevin Desmond*	King County Metro Transit	Ex Officio
Bob Drewel	PSRC	Regional Interests – PSRC
Chris Eggen	Councilmember - Shoreline	Elected Officials – West
David Freiboth	Labor Council	Organized Labor
Noel Gerken	Mayor - Maple Valley	Elected Officials – South
Christine Hoffmann	Redmond Chamber	Economic Development – East
Carl Jackson	Amalgamated Transit Union	Organized Labor
Rob Johnson	Transportation Choices	Regional Interests – Environmental
Kate Joncas	Downtown Seattle Assoc	Economic Development – West
Josh Kavanagh	University of Washington	Education – West
Jane Kuechle	AtWork!	Regional Interests – Accessible Services
Steve Marshall	Cascadia Center	Transportation Expert
Ed Miller		Transit Advisory Committee
Lynn Moody	Hopelink	Social Services – East
Estela Ortega	El Centro De La Raza	Social Services – West
Tom Pierson	Federal Way Chamber	Economic Development – South
Tom Rasmussen	Councilmember - Seattle	Elected Officials – West
Carla Saulter		Riders – West
Jared Smith	Parsons Brinckerhoff	Transportation Expert
Jim Stanton	Microsoft	Trip Reduction – East
Bob Swarner		Riders – South
Ron Tober* (starting in Sept. replaced by Greg Walker)	Sound Transit	Ex Officio
Liz Warman	Boeing	Trip Reduction – South
Larry Yok	Highline Community College	Education – South

* Ex-Officio Member

Facilitator: John Howell, Cedar River Group, LLC

Regional Transit Task Force



- | | | | |
|----|---------------|----|--------------------|
| 1 | Larry Yok | 15 | Grant Degginger |
| 2 | Estela Ortega | 16 | Rob Johnson |
| 3 | Ed Miller | 17 | Carl Jackson |
| 4 | Lynn Moody | 18 | David Freiboth |
| 5 | Suzette Cooke | 19 | Fred Butler |
| 6 | Ron Tober | 20 | Steve Marshall |
| 7 | Jared Smith | 21 | Bob Drewel |
| 8 | Jane Kuechle | 22 | Christine Hoffmann |
| 9 | Shiv Batra | 23 | Jim Stanton |
| 10 | Gene Baxstrom | 24 | Carla Saulter |
| 11 | Tom Pierson | 25 | Tom Rasmussen |
| 12 | Chris Eggen | | |
| 13 | Noel Gerken | | |
| 14 | Josh Kavanagh | | |
- Not pictured: Chuck Ayers, Kevin Desmond, Kate Joncas, Bob Swarner, and Liz Warman

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Executive Summary

Background

Task Force Charge and Process

The King County Council and Executive formed the Regional Transit Task Force in February 2010 to consider a policy framework for the potential future growth and, if necessary, contraction of King County's transit system. The County Council asked the task force to consider six transit system design factors, to which the task force added a seventh: environmental sustainability (see box).

Key Transit System Design Factors

1. Land use
2. Social equity and environmental justice
3. Financial sustainability
4. Geographic equity
5. Economic development
6. Productivity and efficiency
7. Environmental sustainability

The 28 task force members were selected to represent a broad diversity of interests and perspectives. Three *ex officio* members represented King County Metro Transit, Sound Transit and the Washington State Legislature. An Executive Committee (County Executive and three County Council members) ensured that the task force carried out its approved work plan. Metro's Manager of Service Development served as the project manager. An Interbranch Working Group supported the Executive Committee and task force's work. Cedar River Group was hired to facilitate the process. The task force created two subgroups of task force members to delve into performance measures and cost control/efficiencies.

The task force met from March through October 2010. The task force used a consensus-based decision-making approach, defining consensus as "all members can support or live with the task force recommendations." The task force agreed that if consensus was not unanimous, the differences of opinion would be included with the final recommendations. Task force meetings were open to the public. The task force set aside time in each meeting for public comment and reviewed comments submitted on its website.

The County Council and Executive created the task force as a result of several factors. A severe recession that struck the Puget Sound region and the nation in late 2008 has changed the road ahead for Metro. The precipitous decline in economic activity led to a dramatic fall in sales tax receipts. Since 62 percent of Metro's operating revenue comes from sales taxes, the drop in receipts has had a big impact. At the same time, Metro's ridership has grown significantly, and public expectations remain high. Also in 2008, the Puget Sound Regional Council (PSRC) developed the *Vision 2040* and *Transportation 2040* plans for long-term growth and mobility of the region. These plans project a 42 percent increase in King County's population and a 57 percent increase in jobs from 2000 to 2040,

with most of this growth occurring in the county's 12 largest cities. The plans call for an aggressive strategy to expand transit services to support that growth.

In developing the 2010-2011 biennium budget, Metro and King County were able to avoid large reductions in transit service by making difficult choices and trade-offs, along with some temporary, one-time fixes. However, based on the County's revenue forecast through 2015, dramatic transit service reductions will be needed beginning in 2012.

Metro and Regional Overview

In early meetings, the task force learned about Metro's work and budget, the regional transit system, and regional employment and population forecasts.

Metro Services. King County Metro Transit is the biggest public transportation agency in

Washington state and one of the 10 largest bus systems in the nation. In 2009 Metro carried approximately 112 million riders (boardings) on 220 fixed routes connecting multiple centers throughout the county. Dial-a-Ride (DART) service operates on a route with some fixed time points, but deviates to pick up or drop off passengers. Metro serves 130 park-and-ride facilities with more than 25,000 parking stalls. Use has been at 74 percent since 2002. Metro operates one RapidRide bus rapid transit (BRT) line, with five more planned to start service between 2011 and 2013 with frequent, all-day service in busy transit corridors. Metro operates a 1.3-mile transit tunnel in downtown Seattle that is served by buses and Sound Transit's Link light rail. Metro also serves 13 transit centers and operates service out of seven transit bases. Metro has approximately 69 lane-miles of overhead two-way wire for electric trolleybuses, which serve almost one-fifth of Metro ridership. Metro's fleet is operated by nearly 2,700 full- and part-time drivers. Service for riders with

Themes from Task Force Discussions

- **Regional Perspective:** Strike a balance among: the best interest of the region as a whole, the needs of Metro riders, and the interests and needs of local communities.
- **Transparency:** Decision-making must be clear, consistent, and based on criteria and objectives that are clear to the public.
- **Efficiency:** Metro and King County must achieve greater efficiencies in transit operations, plans for new service, and in administration of the system.
- **Balanced Approach.** To avoid reductions in transit services and to meet future demand will require a combination of expense reductions, efficiencies and securing new revenues.
- **Performance Based.** Use tools, decision processes, and reporting that allow all interested parties to evaluate performance.

disabilities or special needs includes: accessible service on fixed routes; contracted American with Disabilities Act (ADA) paratransit van service (Access); vans operated by local nonprofits (Community Access Transportation – CAT); and taxi scrip. Metro's vanpools serve 6,100 people on an average weekday in more than 1,000 vans. Metro supports the regional Ridematch program for vanpools and carpools. Metro's services to employers include commute trip reduction (CTR), pass sales, and a Custom Bus Program.

Partnership Agreements. Metro has created agreements with local businesses and jurisdictions to help support increased levels of transit service. In return for various partner actions, such as payments to support operating costs, investments to enhance transit speed and reliability, or enhancements to passenger facilities, Metro provides increased levels of service.

Customer Satisfaction. Overall rider satisfaction has remained relatively strong in the past decade, with 93 percent of riders "very" or "somewhat" satisfied (slightly lower in the south county planning area).

Integrated Regional Transit System. Seven other transit agencies serve riders in the central Puget Sound region: Community Transit (Snohomish County), Pierce Transit, Sound Transit (King, Snohomish and Pierce county urban areas), Washington State Ferries, City of Seattle (monorail and South Lake Union Streetcar), Everett Transit, and Kitsap Transit. Metro works closely with these agencies on planning, operations, fare coordination, joint facility construction, and major project implementation. Metro operates some Sound Transit Regional Express bus service, Link light rail, and Seattle’s South Lake Union Streetcar.

Metro’s Budget. Metro’s 2010-2011 biennial operating budget includes \$968 million in revenues and \$1.2 billion in expenses. Most of the operating revenue (62 percent) is from a local options sales and use tax. The sales tax rate, 0.9 percent, is the maximum currently available to local transit agencies. Another 26 percent of Metro’s revenue comes from fares. The largest operating expense category (65 percent) is for the personnel who provide Metro’s services and programs. Nine percent of operating expenses are for King County government overhead charges and services from other County departments. Metro’s capital program for 2009–2015 totals \$1.28 billion, of which 59 percent is for fleet replacement.

Challenge Facing Metro. Metro took action in the 2008-2009 mid-biennial budget process to cut the capital program by more than \$65 million, freeze hiring, reduce 19 full-time and 7 limited-term positions, and raise transit and paratransit fares. (Metro had eliminated 27 full time and term-limited staff positions in 2007, and approved the first of four fare increases between 2008 and 2011.) With the 2010-2011 biennial budget, Metro’s plan included increasing fares, eliminating 70 staff positions, cutting bus service by 75,000 hours, deferring bus service expansion, reducing operating reserves for four years, using fleet replacement reserves, and implementing schedule efficiencies estimated to save 125,000 hours. Between 2009 and 2015, Metro projects a revenue shortfall of \$1.176 billion. Without other actions, this would mean cutting 400,000 hours of existing service by 2013, and another 200,000 hours by 2015.

National, Regional and State Trends. Transit agencies across the nation face similar funding crises and have had to make tough choices. In our region, Intercity Transit (Olympia), Community Transit, Pierce Transit and Sound Transit all are making program adjustments or service cuts. Two (Intercity and Pierce) have sought or will seek voter approval of sales tax increases. The Joint Transportation Committee of the legislature is studying the state’s role in public transportation, with a final report due in mid-December 2010.

Recommendations

Recommendation 1: Metro should create and adopt a new set of performance measures by service type, and report at least annually on the agency’s performance on these measures. The performance measures should incorporate reporting on the key system design factors, and should include comparisons with Metro’s peer transit agencies.

Performance measures will help the public, Metro managers and King County decision makers understand if the transit system is meeting operational and policy objectives. As an evaluation tool, performance measures will help Metro understand how it might improve transit system performance, and establish a strong rationale for difficult policy choices. Regular reporting on the performance measures will aid in transparency. The frequency of reporting should be identified when the measures are adopted, but should be at least annually. (There may be different reporting frequencies for some of the performance measures.)

The task force subgroup on performance measures worked with Metro staff to develop an initial example of metrics for overall system performance and easy-to-understand reporting. The task force recommends that Metro continue developing performance measures using this model. The task force suggests that Metro develop performance measures for all of Metro's operations (e.g., customer service, vehicle maintenance, etc.). The task force supports Metro's suggestion to include recommendations for the performance measurement system in Metro's Comprehensive and Strategic Plans to be submitted to the County Council by February 2011.

Recommendation 2: King County and Metro management must control all of the agency's operating expenses to provide a cost structure that is sustainable over time. Cost-control strategies should include continued implementation of the 2009 performance audit findings, exploration of alternative service delivery models, and potential reduction of overhead and internal service charges.

The task force believes that Metro's financial model, with current revenue sources and Metro's expense structure, is not sustainable over the long-term. The task force recommends effort in three areas:

- Continue to follow up on the 2009 King County Performance Audit recommendations to further reduce costs, create efficiencies and implement savings strategies. Provide regular updates on progress and the expected timetable for implementation.
- Explore opportunities for alternative service products and service delivery models (e.g., carpools, vanpools, DART, taxi scrip, CAT and Access paratransit), including contracting out for some underperforming fixed-route services. Any contracting out should be consistent with broad labor harmony principles.
- King County should clearly explain how and why overhead and internal service charges are allocated to Metro and County departments, and continue to explore ways to reduce overall overhead and internal service charges.

Recommendation 3: The policy guidance for making service reduction and service growth decisions should be based on the following priorities:

- 1) Emphasize productivity due to its linkage to economic development, land use, financial sustainability, and environmental sustainability**
- 2) Ensure social equity**
- 3) Provide geographic value throughout the county.**

Task force members concluded that one overarching statement of policy direction and one approach to implementation of that policy should guide all service allocation decisions. They recommend that the policy statements they have crafted and the recommended use of guidelines and performance measures should provide the foundation for all future service allocation decisions, including service reductions, service growth, service restoration, and the ongoing maintenance of transit services in response to changes in system demand or route performance. The approach represents a fundamental change in the way transit service allocation decisions are made by King County (see box on p. 5).

The task force concluded that one of the transit design factors, productivity and efficiency, has a strong correlation to several of the other factors—land use, economic development and financial sustainability and environmental sustainability. As a result, the task force is recommending a new policy framework to make service allocation decisions. The intent is to optimize efficiency of transit services, deliver people to employment, activity and residential centers, meet the needs of those that are most dependent on transit, and create a system that is a fair distribution of service throughout the county.

Recommended Policy Direction Would Replace Existing Policy Guidance for Service Growth and Reduction

The current policy for transit service growth and reduction is based on three King County subareas (east, west and south) and was established in Metro's 2002–2007 Six-Year Transit Development Plan.

For service growth, every 200,000 hours of new transit service is to be allocated with 40 percent to the east subarea, 40 percent to the south, and 20 percent to the west. This is called the 40/40/20 policy.

Any systemwide service reductions are to take place in proportion to each subarea's share of the total service investment. Based on the current hours of service in each subarea, 62 percent of the reduction would have to come from the west subarea, 21 percent from the south and 17 percent from the east. This is commonly called the 60/20/20 policy.

Recommendation 4: Create clear and transparent guidelines to be used for making service allocation decisions, based upon the recommended policy direction.

Task force members concluded that a new approach to decision-making is needed. Members felt strongly that stakeholders need to understand the basis for service allocation decisions, and how those decisions will be evaluated and adjusted over time. It is essential to this new policy direction to develop and adopt service guidelines, along with the performance measures recommended above.

Service guidelines establish the objective metrics for making service allocation decisions. Guidelines will help the public, Metro and King County decision makers determine the appropriate level and type of service for different corridors and destinations, and for employment and population densities throughout the county. The task force supports Metro's proposal to incorporate newly developed guidelines into Metro's Comprehensive and Strategic Plans to be submitted to the County Council in February 2011.

Recommendation 5: Use the following principles to provide direction for the development of service guidelines.

The task force did not develop recommended guidelines. They did, however, create a set of principle statements that should be used to shape the creation of the guidelines. The following principles should apply to all guidelines:

- Transparency, clarity and measurability
- Use of the system design factors
- Flexibility to address dynamic financial conditions
- Integration with the regional transportation system
- Development of performance thresholds as the basis for decision-making on network changes (e.g., load factor on bus routes, see p. 28).

Metro staff created conceptual scenarios and example guidelines for service reduction using the draft policy guidance. The approach involved three steps: (1) eliminating the least productive routes; (2) assessing the impact of step 1 and adjusting based on social equity, system connectivity, and geographic coverage; and (3) identifying opportunities for efficiencies. In a similar exercise for service growth, the task force identified two types of future growth: (a) response to ridership demand (to address over-crowded bus routes), and (b) support for regional growth (to connect identified population, employment and activity centers).

Recommendation 6: King County, Metro, and a broad coalition of community and business interests should pursue state legislation to create additional revenue sources that would provide a long-term, more sustainable base of revenue support for transit services. To build support for that work, it is essential that King County adopt and implement the task force recommendations, including use of the service guidelines and performance measures, and continue efforts to reduce Metro's operating costs.

The task force concluded that long-term, sustainable revenues for transit service are needed, given the dramatic fluctuations in Metro's primary source of revenue (sales tax), the size of likely service reductions over the next five years, transit's importance to economic recovery, and the need for transit to support the expected growth in population and employment. The task force identified three characteristics for a successful long-term revenue strategy: diversity of revenue sources, sufficient size of revenue source to address long-term needs, and flexibility to include a statewide and/or a local revenue source.

King County and Metro should create a coalition of partners to begin immediately to inform state legislative leaders about the breadth of the potential service reductions facing the Metro system, the task force recommendations, and the actions Metro and King County are taking to address the anticipated revenue shortfall. It may take several legislative sessions to secure support for a long-term, sustainable funding initiative.

Recommendation 7: Metro staff should use the task force recommendations and discussions as the framework for revising Metro's current mission statement, and creating a vision statement (as one does not now exist). Both draft statements should be included in the draft Comprehensive and Strategic Plans scheduled to be submitted to the County Council in February 2011.

Conclusion

The task force has created consensus recommendations that reflect a new policy direction for allocation decisions for transit service reduction and future service growth. The task force also has recommended a method for decision-making that will result in greater clarity, transparency and perceived fairness in decisions allocating Metro transit services.



Introduction

Charge to the Task Force

The King County Council and Executive formed the Regional Transit Task Force in February 2010 for the purpose of considering a policy framework to guide the potential future growth and, if necessary, contraction of King County’s transit system. (See Appendix 2.) The County Council’s charge to the Regional Transit Task Force is to develop recommendations that will “identify short-term and long-term objectives for transit service investment, and formulate a service implementation policy implementing those objectives” (Expenditure Restriction [ER] 3 of 2010 King County Metro Transit budget, Ordinance 16717, Section 131, November 23, 2009).

As described in the Regional Stakeholder Task Force Work Plan (February 2010), the primary objective of the task force is to recommend to the County Executive and County Council a policy framework that reflects the prioritization of key system design factors (see p. 8), and to make recommendations about transit system design and function. The overall framework is to include:

- Concurrence with, or proposed changes to, the vision and mission of Metro
- Criteria for systematically growing the transit system to achieve the vision
- State and federal legislative agenda issues to achieve the vision
- Strategies for increasing the efficiency of King County Metro
- Criteria for systematically reducing the transit system should revenues not be available to sustain it.

In late 2008, a severe recession struck the region and the nation and has changed the road ahead for Metro. The accompanying precipitous decline in economic activity has meant a dramatic fall in sales tax receipts. This has had a significant effect on Metro’s operating budget, beginning with the 2008-2009 biennial budget and continuing through the 2010-2011 biennial budget. At the same time, public expectations for transit service remain high.

When revenues started to fall in 2008, Metro also experienced significant ridership growth, spurred in part by high gas prices. Ridership in 2008 reached nearly 120 million, a record for Metro. Although ridership was not quite as high as in 2009 (112 million), it was considerably higher than earlier in the decade (approximately 95 million in 2002).

When developing its 2010-2011 biennium budget, Metro and King County officials made a number of decisions to avoid large reductions in transit service. Most of the budget decisions involved difficult choices and trade-offs, but some of the actions were temporary, one-time fixes. As a result, based on the County’s revenue forecast, dramatic transit service reductions are forecast for the next several years, beginning in 2012.

During this same time period of declining economic activity, the Puget Sound Regional Council (PSRC) was creating, and then adopted the *Vision 2040* and *Transportation 2040* plans for the long-term growth and mobility of the central Puget Sound region. Those plans forecast significant population and economic growth in King County during the next 30 years. The plans call for that growth to be more concentrated in designated regional growth centers in “metropolitan” and “core” cities², and for an aggressive strategy to expand transit services to support that growth.

Task Force Work Plan

The work plan adopted by the County Council set out six transit system design factors. The task force, in its discussions, added a seventh. These design factors are as follows:

1. Land use
2. Social equity and environmental justice
3. Financial sustainability
4. Geographic equity
5. Economic development
6. Productivity and efficiency
7. Environmental sustainability (added by the task force).

The work plan did not define these factors, but left it to the task force to determine “how and to what extent these considerations should be reflected in the design of King County’s transit system.”

Section 2 of this report describes the process used by the task force to develop its recommendations. Section 3 provides an overview of the background information provided to the task force that provided the context for their deliberations. Section 4 provides the task force’s recommendations.

2 In King County, PSRC has identified two “metropolitan cities” (Bellevue and Seattle), and 10 “core cities” (Auburn, Bothell, Burien, Federal Way, Kent, Kirkland, Redmond, Renton, SeaTac and Tukwila).



Task Force Process

Structure and Roles

The February 2010 work plan for the task force set out the appointment of task force members by the County Executive, and the supporting structure of an Executive Committee, a project manager, an Interbranch Working Group and a third-party professional facilitator. Task force members were selected to represent a broad diversity of interests and perspectives. (See the list of task force members, p. i.) The Executive Committee, consisting of the County Executive and three County Council members, was responsible for ensuring that the task force carried out its approved work plan objectives and charge. The Metro Transit Manager of Service Development was designated as the project manager to oversee the task force's day-to-day needs, supervise the contract with an outside facilitator, and coordinate development of materials for the task force. The Interbranch Working Group, consisting of staff members representing the County Executive, Metro Transit and the County Council, was to support the Executive Committee and task force's review and preparation of materials. John Howell of Cedar River Group was hired as the facilitator, with the general roles of laying the foundation for the task force's deliberations, building consensus among task force members, and drafting and finalizing the recommendations.

The task force itself decided to create two subgroups to delve further into two topics: performance measures and cost control/efficiencies. These subgroups each consisted of several task force members, with the support of Metro staff and the task force facilitator. The subgroup meetings were open to any interested task force member. Subgroup members reported on their work at the full task force meetings. The performance measures subgroup met three times and the cost control/efficiency subgroup met five times between June and August.

Written summaries of the full task force meetings and subgroup meetings were distributed to the members. Those summaries, along with most of the materials presented at those meetings, are not included in this report but can be reviewed on Metro's website at www.kingcounty.gov/transittaskforce.

Meeting Schedule and Topics

The full task force began meeting monthly, starting on March 30, 2010. In light of the time needed to accomplish the tasks laid out in the scope of work, the task force opted to meet twice a month starting in June. The original schedule called for the task force to complete work and provide a final report in September 2010. However, in early August, given the significant work being developed both by the subgroups and in task force meetings, the task force requested an extension through October. The

County Executive and County Council granted this extension in a letter dated August 19, 2010. The flow of meeting topics was as follows:

Regional Transit Task Force Meeting Topics

Establish task force ground rules and procedures	March 30 April 20
Build a common base of knowledge and understanding about Metro, the County Auditor’s recent performance audit of Metro, and regional growth forecasts	March 30 April 20 May 13
Definitions of the six key transit system design factors, and discussion of how they have influenced and should influence the system	May 13 June 3
Discussion of peer agency comparisons; definition of Metro’s different “families” or types of services	June 3
Reports from subgroups on performance measures and on cost control/efficiency	June 17 July 1 and 15 August 5
Discussion of initial service scenarios by service type for growth and for reduction, including key policy trade-offs	June 17
Discussion of draft statements of emerging policy direction	July 1 and 15 September 16
Draft policy direction for potential service reductions; review of draft service reduction scenario	July 1 and 15 September 2 and 16
Draft policy direction for potential service additions; review of draft service growth scenario	August 5 and 19 September 16
Sustainable funding options	August 19 September 16
State and federal legislative agenda to accommodate recommendations	September 16 October 7
Review draft and final reports	October 7 and 21

Consensus Approach and Ground Rules

The County Council–adopted work plan suggests a consensus-based decision-making approach for the task force, to be established in its ground rules and procedures. The task force itself adopted a set of ground rules at its second meeting on April 20, 2010 (see Appendix 3) and defined consensus as a goal of reaching unanimous agreement on the task force’s recommendations. The ground rules defined consensus as “all members can support or live with the task force recommendations.” However, the ground rules included the provision that if the task force could not reach unanimous consensus, the differences of opinion would be noted and included as part of the final recommendations.

Public Information and Comment

The task force meetings were open to the public. All meetings except one were held at the Mercer Island Community Center. The task force has a webpage on the King County Department of Transportation website. Metro staff posted on this webpage the task force meeting schedule, the list of task force members, and the materials from each meeting. The task force also set aside time at the end of each meeting to hear comments from anyone in the public who wished to speak. Public comments were offered at each meeting. These comments were included as part of the meeting summaries, which were also posted on the task force's website. In addition, the website included an online comment form. Comments that were made on the website were distributed to the task force at its next meeting.

Statements of Policy Direction

As the task force delved into the transit design factors, the work of the two subgroups, and the service reduction and growth scenarios, their discussion began to suggest important policy directions. As the process progressed, Mr. Howell developed "statements of emerging policy direction" for the task force to review as a way of refining ideas and testing the level of consensus. Also, the statements gave Metro staff the direction needed to develop more detailed reduction scenarios and to flesh out the service reduction and growth concepts. The task force further revised the statements of policy direction in September. These statements formed the core of the task force's recommendations.



Background Information

The task force spent much of its early work learning about Metro's operations and budget, its relationship to the regional transit system, and employment and population forecasts for the Central Puget Sound region. This provided the necessary framework for developing their recommendations. This section provides an overview of this information as context for the task force's recommendations.

Overview of Metro Services and Budget

Metro Services

King County Metro Transit is one of the 10 largest bus systems in the nation and is the biggest public transportation agency in Washington state. Metro provides transit service in King County, an area of 2,134 square miles, with more than 1.8 million residents. Metro's transit system is part of an integrated public transportation network that serves residents in the Central Puget Sound region. Metro explores innovative ways to reduce pollution with hybrid diesel-electric buses, electric trolleybuses, and cleaner fuels, and by equipping all buses with bicycle racks. Metro also works to encourage people to use transit through Transportation Demand Management strategies.

Metro manages a variety of programs to serve the public transportation needs of King County residents, employers and major institutions, and operates several types of transit services. The most visible and by far the largest portion of the network is fixed route bus service that provides connections between multiple centers throughout the county (i.e., cities and towns, and employment, retail, educational and civic centers, etc.). Metro also operates some Dial-a-Ride (DART) service that operates on a route with some fixed time points, but deviates from the route to pick up or drop off passengers before heading back to the next established time point.

In 2009 Metro carried approximately 112 million riders (boardings) on fixed route service, with passengers traveling an estimated 495 million miles. Metro's ridership (as measured in boardings per platform hour) has grown by 2.3 percent per year in recent years (2001–2008), the highest growth rate among U.S. metropolitan transit agencies. Metro operates a fleet of about 1,400 vehicles on more than 220 fixed routes. The fleet is operated by nearly 2,700 full- and part-time bus drivers. Metro serves approximately 9,500 bus stops and 130 park-and-ride facilities with more than 25,000 parking stalls. The overall utilization rate for all park-and-ride lots has remained relatively constant since 2002, at 74 percent, although the total number of parking stalls has increased from approximately 19,000 in 2002 to more than 24,000 in 2009. Metro operates one RapidRide bus rapid transit (BRT) line, with five more planned to start service between 2011 and 2013 to provide frequent, all-day service in busy transit corridors. Metro operates a 1.3-mile transit tunnel in downtown Seattle that is served by buses and Sound Transit's Link light rail. Metro also serves 13 transit centers and operates service out of seven transit bases. Metro has approximately 69 lane-miles of overhead two-way wire for electric trolleybuses, which serve almost one-fifth of Metro ridership.

Metro serves riders who are disabled or who have special needs in four ways: with accessible, fixed-route service (all Metro buses have wheelchair lifts or ramps, and all routes and trips are accessible), with contracted Americans with Disabilities Act (ADA) paratransit van service (called Access), with community vans operated by local nonprofits (known as Community Access Transportation – CAT), and with a taxi scrip program. In 2009 there were approximately 1.2 million paratransit boardings, 211,400 CAT boardings, and 34,000 taxi scrip passenger rides.

Metro operates the largest publicly owned vanpool program in the nation. By the end of 2009, Metro had more than 1,000 vans serving on an average weekday approximately 6,100 people. These rides eliminate approximately 5,000 vehicles from the roads each day. Metro also supports the regional Ridematch program, which helps commuters form and sustain new vanpools and carpools in seven counties by matching names in a computer database.

Metro provides extensive commute trip reduction (CTR) services to many of the 561 worksites in King County affected by the CTR law. Metro sells transit and commuter-van passes to more than 2,000 employers, and offers a Custom Bus Program for employers and educational institutions that need service outside of fixed route transit.

Partnership Agreements

Metro has created agreements with local businesses and jurisdictions to help support increased levels of transit service. For example, an element of the 2006 Transit Now Program set aside 90,000 annual service hours to develop partnerships in two forms:

- **Direct financial participation:** The partner, business or local jurisdiction agrees to pay a least one-third of the fully allocated cost of delivering the agreed upon service investment. If the partnership agreement is for expansion of an existing route, the partner's minimum commitment is \$100,000 per year for five years. If the service investment is to establish a new route, a minimum partner commitment of \$200,000 per year for five years is required.

- **Transit speed and reliability project participation:** When a local jurisdiction partner makes a capital investment or traffic operations change to improve transit speed and reliability by 10 percent along a RapidRide corridor, or “core service connection” corridors, Metro provided a match of 5,000 annual service hours for each core route along the designated corridor.

Other forms of service partnerships have also been created where service investments are developed and implemented primarily for the benefit of an individual entity, but access to public transportation services is increased for all. An example is service additions funded by the Washington State Department of Transportation (WSDOT) to mitigate impacts of construction. The partners fund the operating cost and Metro provides capital and elements of service delivery including rolling stock, route facilities, rider information, etc.

Additional partnerships have been forged with many local jurisdictions around the provision of passenger facilities and amenities, as well as the provision of transit signal priority and bus lanes to aid the speed and travel time reliability. RapidRide is the latest partnership example, with Metro working with 11 local jurisdictions on six corridors to provide a “total transit product” including increased service, speed and reliability projects, and passenger facilities.

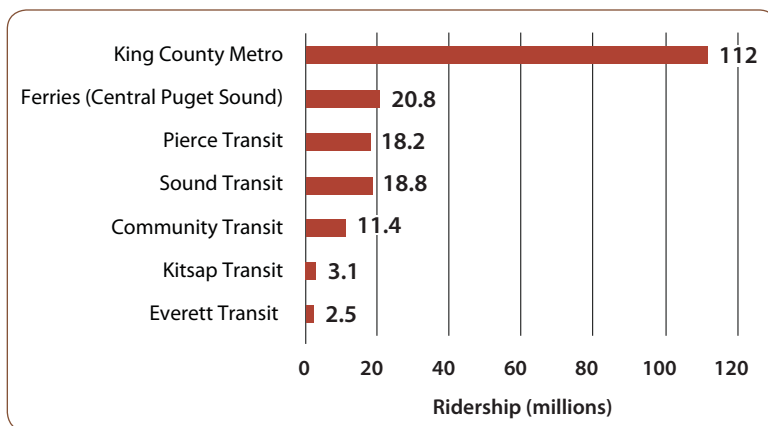
Customer Satisfaction

Overall rider satisfaction with Metro’s variety of services has remained relatively strong during the past decade. For each year between 2000 and 2009, 93 percent or 94 percent of riders surveyed described themselves as either “very satisfied” or “somewhat satisfied” with Metro’s services. The results are similar across Metro’s three planning subareas (East King County, Seattle and North King County, and South King County), although rider satisfaction is somewhat lower in the south county planning area. (In 2009, 89 percent of riders in that subarea described themselves as very or somewhat satisfied.)

Integrated Regional Transit System

Besides Metro, seven other agencies provide public transit service in the Central Puget Sound region. These are Community Transit (Snohomish County), Pierce Transit, Sound Transit (connecting the urban areas of King, Snohomish and Pierce counties), Washington State Ferries, City of Seattle (monorail and South Lake Union Streetcar), Everett Transit, and Kitsap Transit. (See Figure 1 for a comparison of ridership.) Everett and Kitsap Transit do not provide service in King County but coordinate with the other agencies on intracounty services. Metro works closely with the other transit and transportation agencies in the Puget Sound region on planning, service and operations, fare coordination, joint facility construction, and major project implementation. This coordination results in route restructures, service integration to create connections between and among the different systems, efficient use of

Figure 1. Ridership of Central Puget Sound Transit Agencies (2009)
(in millions)



resources (such as reducing duplicative services), capital facility design and construction collaboration, and coordination of a regional fare system (the ORCA card). Additionally, Metro operates some Sound Transit Regional Express bus service, Link light rail, and the City of Seattle’s South Lake Union Streetcar.

The bus service provided by Community Transit in King County is primarily

commuter service to and from major employment or education centers in King County. Pierce Transit provides local service in Federal Way and peak-only service connecting to Auburn Station. Sound Transit manages Sounder Commuter Rail service, Link light rail, and regional express bus service. Sound Transit bus service is focused on the corridors that connect residential and employment centers in Pierce, King and Snohomish counties (I-90, I-5, I-405, SR167, SR522 and SR 520). Sound Transit provides all day, two-way limited-stop service that operates primarily on freeways.

In addition, Metro and the other transit agencies work closely with WSDOT and local jurisdictions on the planning, operation and capital improvements for the state and local highway system, including the use of the High Occupancy Vehicle (HOV) lanes.

Budgeted Revenues and Expenses

Metro’s total 2010–2011 biennial operating budget includes \$968 million in operating revenues and \$1.2 billion in total operating expenses. (The biennial expenses are greater than the revenues because the budget includes a transfer from Metro’s capital fund and the use of a portion of the fleet replacement fund to balance the budget.) Metro receives most of its operating revenue (62 percent) from a local options sales and use tax. The sales tax rate, 0.9 percent, has been in effect since late 2006 when voters approved a 0.1 percent increase as part of the Transit Now program. King County raises the full 0.9 percent currently available to local transit agencies.² Another 26 percent of Metro’s revenue is generated from farebox revenues. (See Figure 2.)

The largest category of expenditure (see Figure 3) is related to the personnel required to provide Metro’s services and programs—65 percent of operating expenses are for wages and benefits. The task force reviewed data regarding operator pay rates for Metro and 29 other public transit agencies around the country, including seven in Washington state. Metro ranked second in the percentage increase in the top hourly rate for operator wages between 2004 and 2009. Six other transit agencies in Washington state were in the top 15. Nine percent of Metro’s operating expenses are composed of payments to King County government for overhead charges and internal services that Metro “purchases” from other County departments (e.g., public safety services).

Metro’s capital program for 2009-2015 totals \$1.28 billion. The largest category of capital expenditure (59 percent) is for fleet replacement (bus, vanpool and paratransit). Another 14 percent is used for corridor and passenger facilities, and 9 percent for asset maintenance.

Figure 2. King County Metro's Operating Revenue Sources (by percent, for 2010–11)

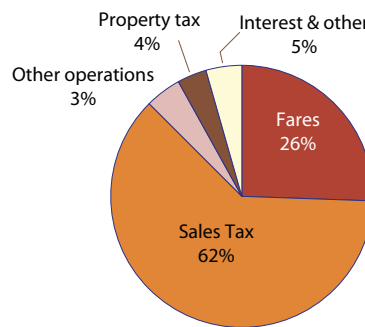
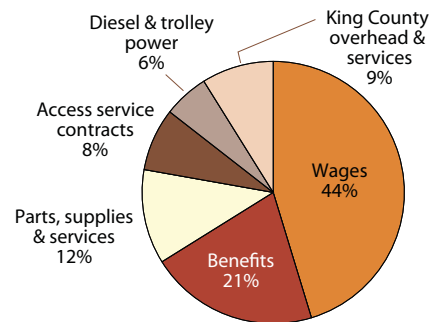


Figure 3. King County Metro's Operating Expenses (by percent, for 2010–11)



² In 1972 King County voters approved a 0.3 percent sales tax to fund a countywide bus system operated by Metro. In 1976 Metro began collecting Motor Vehicle Excise Tax (MVET) to fund transit. In 1980 King County voters approved an increase in sales tax of 0.3 percent for transit. In 1999 state voters approved Initiative 695 to roll back the MVET. In 2000 the State Legislature authorized transit districts to raise sales tax levies up to 0.9 percent. In 2000 King County voters approved a 0.2 percent sales tax increase for transit, to restore cuts made after I-695 rolled back the MVET. In 2006 King County voters approved Transit Now, a 0.1 percent sales tax increase to reach the authorized maximum of 0.9 percent.

Challenges Facing Metro and Other Transit Agencies

Metro

In the latter part of 2008 the economic recession began to impact sales tax receipts, Metro’s largest source of revenue. As a result, during the 2008–2009 mid-biennial budget process the County took a series of actions to address the decline in revenues. The actions included cutting the capital program by more than \$65 million, freezing hiring and eliminating 19 full-time and seven term-limited positions, raising regular transit and paratransit fares, and reorganizing some activities. This followed an earlier staff reduction in 2007 of 27 full-time and term-limited positions.

In the current 2010–2011 biennial budget period, the County has developed a nine-point plan to cut costs, increase revenues and avoid major service reductions. Some of the key elements of the 2010–2011 operating budget included:

- increasing fares
- eliminating 70 staff positions
- cutting bus service by 75,000 hours
- deferring bus service expansion (including suspension of Transit Now service improvements, except for Rapid Ride and approved partnership agreements)
- reducing operating reserves for four years,
- using fleet replacement reserves
- implementing schedule efficiencies identified by the County Auditor in a 2009 performance audit, which Metro estimates will result in 125,000 hours in savings.

Figure 4 (below) provides a graphic representation of the drop in projected sales tax revenues. The “Original Sales Tax Revenue Projection” reflects the projection prepared for the 2008–2009 biennial budget. In the autumn of 2009, a new sales tax revenue forecast was developed and adopted as part of the 2010–2011 budget. However, sales tax revenues have continued to drop. In August 2010, the King County Office of Economic and Financial Analysis (OEFA) developed a new sales tax projection that was lower than the one adopted in the 2010–2011 budget.

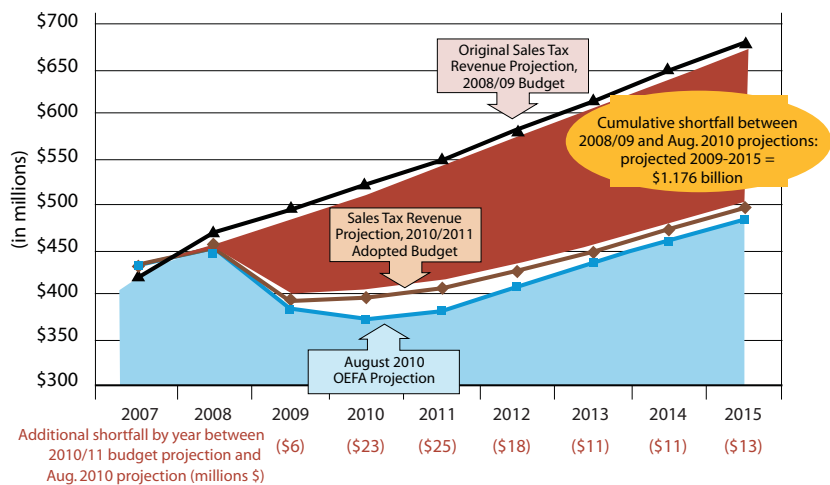
Based on the reductions in projected sales tax revenue, Metro anticipates a shortfall of \$1.176 billion in projected revenue between 2009 and 2015. At the time the 2010–2011 budget was adopted, the County projected that if no additional actions were taken,

400,000 hours of existing service would need to be cut by 2013, and another 200,000 hours by 2015. Even if tax revenues were able to recover to the early 2008 level next year, there would still be a sizable and continuing gap between revenue collected and the revenue projected.

National Trends

Transit agencies across the nation face similar funding crises. They, too, have had to make tough choices, such as service cuts, worker layoffs and fare increases. A 2009 report by Transportation for

Figure 4. Metro’s Projected Sales Tax Revenue Shortfall



America and the Transportation Equity Network, *Stranded at the Station: The Impact of the Financial Crisis in Public Transportation*, describes the conundrum of historic ridership levels coupled with the worst funding crisis in decades. It reports that 90 percent of transit systems have had to raise fares and/or cut service in the past year. A *New York Times* article on July 24, 2010 (“Aging Transit Systems Face Budget Crunch”) described “two seemingly paradoxical trends: greater ridership but limits on the money available to improve the transit system.” Transit agencies in many cities are considering or have already made cutbacks in service while also trying to serve growing demand.

Puget Sound Region

Regional transit systems are also facing similar challenges. Intercity Transit in Olympia has taken cost conservation measures and increased fares by 33 percent since the recession started. To avert cuts to service and possibly provide a modest service improvement, the agency asked for voter approval on the August 2010 ballot of a 0.2 percent sales tax increase. Sales tax makes up more than 76 percent of its revenues. The ballot measure was approved with approval from 64 percent of voters (Intercity Transit news release, “Transit Ballot Measure Passes,” September 3, 2010). This tax increase will raise the agency’s portion of sales tax to 0.8 percent, or 0.1 percent below the ceiling set by state law.

Community Transit in Snohomish County, facing a 20 percent drop in sales tax revenue since 2007, suspended Sunday and holiday service and made route modifications that began in June 2010. The agency is proposing some service restructures when Sound Transit opens new or improved transit centers and service in Mountlake Terrace and Edmonds in 2011 (Community Transit news releases, April 2 and August 10, 2010). Community Transit, like Metro Transit, already utilizes the full 0.9 percent sales tax available to local transit agencies.

Since 2008, Pierce Transit in Pierce County has reduced its staff by 5 percent, delayed or eliminated capital projects, reduced service by nearly 6 percent, raised fares (regular adult fares increased 25 cents), and instituted operating efficiencies. The agency’s board of directors has directed the staff to develop a ballot proposition for the February 2011 election. This measure would enable the agency to exercise the final 0.3 percent sales tax authority available to it in order to meet current service demands (Pierce Transit news release, July 12, 2010).

Sound Transit updated its long-term revenue forecasts in September 2010, predicting that funding levels for Sound Transit 2 will be down by 25 percent, or \$3.9 billion. The agency has concluded that it is no longer possible to complete the entire Sound Transit 2 program within 15 years. The staff has proposed a way to prioritize project and service adjustments for the 2011 budget (Sound Transit news release, “ST kicks off project and service realignment in response to recession impacts,” September 23, 2010). Sound Transit receives the bulk of its funding through sales tax revenues within the urban areas of King, Pierce and Snohomish counties. Voters had approved the \$18 billion Sound Transit 2 plan in late 2008 to expand the regional mass transit system.

State

In the legislature, the Joint Transportation Committee undertook a study in May 2010 on the state’s role in public transportation. The study will explore public transportation efficiency and accountability measures to inform future state investment, and consider a process for establishing priorities for state investment. The final study report is due in mid-December 2010.

Regional Growth Forecast

Growth Plans

As part of the foundation for considering the future transit needs of King County, the task force was briefed on regional growth plans. The PSRC recently adopted a regional growth strategy for the

Central Puget Sound region (Snohomish, King, Pierce and Kitsap counties), published in *Vision 2040*, and a corresponding action plan for transportation, *Transportation 2040*. The plan projects that in the next 30 years, the region will grow by roughly 1.5 million people and support more than 1.2 million new jobs. The growth strategy calls for more growth in the existing large and medium-sized cities, especially in designated urban and manufacturing centers. This is a change from the past, where there was a substantial amount of growth in unincorporated portions of the counties, smaller cities and towns, and in rural areas.

For King County, the PSRC Regional Growth Strategy projects a 42 percent increase in population from 2000 to 2040, and a 57 percent increase in the number of jobs. Growth will be focused in King County's urban centers. Seventeen of the 27 designated regional growth centers, and four of the eight designated regional manufacturing/industrial centers, are located in King County. The plan forecasts that 73 percent of King County's population growth and 83 percent of its employment growth by 2040 will occur in its 12 largest cities. Because the level of employment growth in King County is by far the largest among the four counties in the Central Puget Sound region, the plan projects that more people will be commuting to King County from other counties for work.

Transportation Plan

The recently adopted regional transportation plan, *Transportation 2040*, calls for aggressive expansion of local and regional transit, with between 80 percent and 100 percent increases in bus transit, plus 68 new miles of light rail. It envisions that transit will see a 63 percent increase in the share of the region's total daily trips, and a 74 percent to 90 percent increase in the share of trips to and from work. *Transportation 2040* does not identify funding sources for the transit improvements.



Task Force Recommendations

Introduction

King County is facing potentially unprecedented reductions in transit service based on a sizeable shortfall in sales tax revenues that began in 2008 and is expected to continue at least through 2011. At the same time, the Puget Sound Regional Council has recently adopted the *Vision 2040* regional land use and transportation plan that forecasts dramatic population and employment growth during the next 30 years. An aggressive strategy to expand the existing transit system will be required to support that growth. As a consequence of this dichotomy, the charge to the task force included the development of policy guidance for both the potential reduction and the future growth of Metro's transit services. The work plan for the task force adopted by the King County Council states: "Preserving Metro's current system and finding a way to continue with plans for growth became priorities for King County."

In addition to the recommended overall policy direction, the task force is recommending a new approach to implement its policy guidance. The approach, described below, represents a fundamental change in the way transit service allocation decisions are made by King County.

Current Policy Context for Service Reduction and Service Growth

The background materials provided to the task force included a description of the history and evolution of Metro service allocation policies. The policy basis for allocating transit services based on three subareas (east, west and south) was established in Metro's 1993 Comprehensive Plan for Public Transportation. The policy evolved over the years from one based on the proportion of each subarea's population, to one based on a formula for the distribution of service hours when the system is growing or shrinking. The intent of this policy was to increase the share of service investment outside of Seattle, in growing suburban areas and emerging centers of population and employment in the larger suburban cities. In Metro's 2002–2007 Six-Year Transit Development Plan, the current policy guidance for service growth and reduction was established. For service growth, that policy states that for every 200,000 hours of new transit service, 40 percent of that new service will go to the east subarea, 40 percent to the south subarea, and 20 percent to the west subarea. This is commonly referred to as the 40/40/20 policy. For service reductions, the policy states that "any system-wide reduction in service investment shall be distributed among the subareas in proportion to each subarea's share of the total service investment." Based on the current hours of service provided in each region, 62 percent of the reduction would have to come from the west, 21 percent from the south and 17 percent from the east. This is commonly referred to as the 60/20/20 policy.

Common Themes Shaped Task Force Recommendations

There were several themes that emerged during the months of conversation among task force members that influenced the group's thinking. Each of these themes was raised by task force members on numerous occasions as rationale for the set of recommendations that follow. It is also fair to say that the current economic recession had an effect on shaping the themes that emerged.

- **Take a Regional Perspective.** Task force members often stated that solutions must be found that can strike the right balance among: (a) the best interest of the region as a whole, (b) the needs of riders of the system, and (c) the interests and needs of local communities to insure support for the transit system from all portions of the county. Task force recommendations were informed and guided by the regional policies and forecasts developed as part of *Vision 2040* and *Transportation 2040*.
- **Transparency.** During times of major transition (such as reducing or expanding the transit system), task force members felt that it is particularly important for the decision-making process to be clear, transparent, and based on criteria and objectives that are easy to understand and applied consistently. Members felt that decisions made using this kind of transparency will help build trust and ultimately acceptance of the decisions that are made.
- **Focus on Efficiency.** The size of the potential service reductions and the large gap in available revenues to maintain current service levels suggested to task force members that Metro and King County must achieve greater efficiencies in the overall operation of the transit system.
- **Balanced Approach.** The depth and breadth of the recession has caused nearly all public agencies and many private businesses to consider a balance of cost reduction and revenue enhancement strategies to maintain core services and meet the needs of those served. Task force members often stated that to avoid the forecasted large reductions in transit services and meet future demand will require a combination of expense reductions, efficiencies and securing new revenues.

- **Performance Based.** Consistent with the theme of transparency, task force members believe it is important to enhance Metro’s analytic tools, the County’s decision making processes, and public reporting mechanisms to allow all interested parties to evaluate the performance of individual routes and the performance of the transit system as a whole.

Performance Measures

Early in its deliberations, task force members began asking how Metro transit services were evaluated and what standards were used to determine if service was meeting objectives. The task force concluded that enhancing Metro’s use of and reporting on a system of performance measures is integral to creating the kind of transparency in decision making that builds public confidence in the transit system. Performance measures should be used to evaluate Metro transit services, and help the public, Metro managers and King County decision makers understand if the transit system is meeting operational and policy objectives. The use of performance measures as an evaluation tool will help establish a strong rationale for difficult policy choices, including the inevitable trade-offs that result from making service allocation decisions with limited resources. Regular reporting on the performance measures will aid in transparency. The frequency of reporting should be identified when the measures are adopted, but should be at least annually. (There may be different reporting frequencies for some of the performance measures.)

Recommendation 1: Metro should create and adopt a new set of performance measures by service type, and report at least annually on the agency’s performance on these measures. The performance measures should incorporate reporting on the key system design factors, and should include comparisons with Metro’s peer transit agencies.

The system of performance measures will have three purposes:

- **Evaluate individual routes** – This will allow for analysis and comparison of each type of Metro service, including the different “families” of fixed route service.
- **Evaluate overall system performance** – This will allow for a better understanding of how the system as a whole is performing, including the ability to achieve some broader policy goals, such as the seven key system design factors.
- **Evaluate performance against peer agencies** – This will allow for a metrics-based comparison with other transit agencies that will help Metro understand how it might improve performance of its transit system.

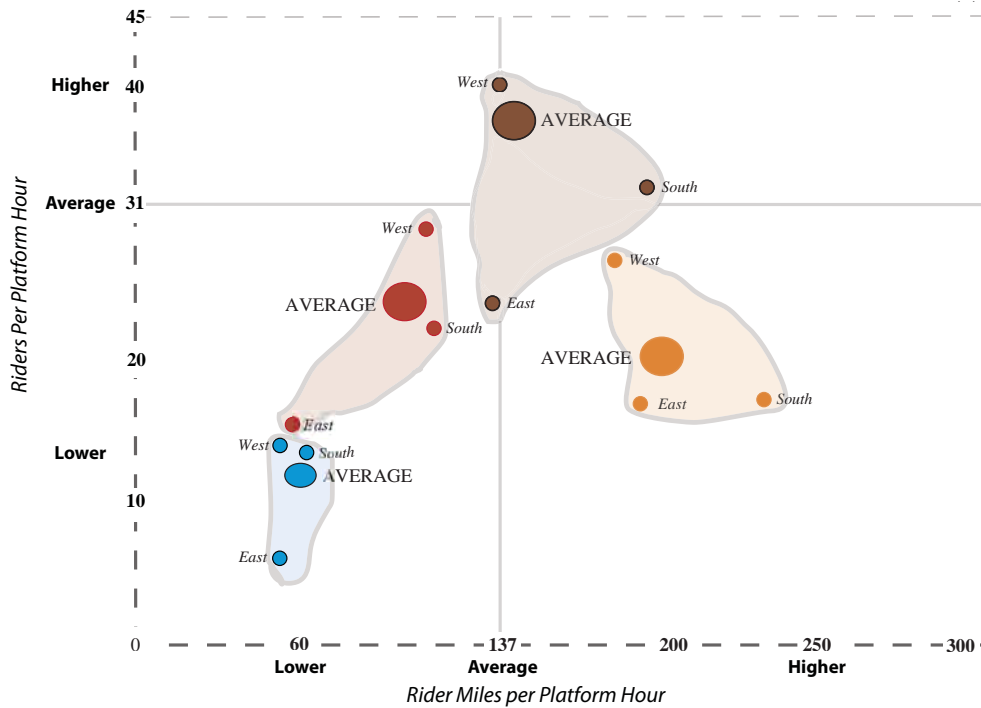
Metro Service Types, Including Families of Fixed-Route Services

Modifying Metro’s current method of compiling and reporting on performance measures will enable Metro managers, King County decision-makers and the public to compare and evaluate the effectiveness of similar service types. The performance measurement system should include the following types of services: fixed route, Dial-A-Ride Transit (DART), Access, vanpool, etc. Reporting on the fixed-route services should be further differentiated by four different “families” of services: Frequent Arterial, Peak Commuter, Local, and Hourly service. Reporting by type, and according to the different families of fixed-route service, is important because the distinctive services provide different functions within the system, and perform very differently.

For example, Figure 5 (next page) shows how the different families of fixed-route service perform on two commonly used productivity measures. The Frequent Arterial bus routes have the highest riders per platform hour (the number of people who board a bus relative to the total number of hours that bus is operating – from when it leaves the base until it returns). This is because these routes

Figure 5. Service Families and Productivity Measures

By area of King County



2009 Families of Fixed Route Services

<p>Frequent Arterial</p> <ul style="list-style-type: none"> 30 minute headways or better, 16-18 hours a day Connect centers 56 routes 73.8 million rides 37.4 riders per platform hour 144 rider miles per platform hour 	<p>Peak Commuter</p> <ul style="list-style-type: none"> Operates only in peak weekday travel periods Connect regional employment centers 99 routes 10.5 million rides 20.8 riders per platform hour 198 rider miles per platform hour
<p>Local</p> <ul style="list-style-type: none"> Operate no better than every 30 minutes Connect to other services and neighborhood centers 60 routes 30 million rides 25.1 riders per platform hour 97 rider miles per platform hour 	<p>Hourly</p> <ul style="list-style-type: none"> Operate no better than every 60 minutes Provides basic transit access and coverage in low density areas 25 routes 1.2 million rides 12 riders per platform hour 60 rider miles per platform hour

Key:

Riders per Platform Hour: A measure that identifies the number of people who board a transit vehicle relative to the total number of hours the vehicle is operating (including traveling to and from its route). Transit services that operate in dense areas on arterial streets and frequently pick up large numbers of people will perform well on this measure.

Rider Miles per Platform Hour: A measure that identifies the number of miles riders travel relative to the total number of hours the vehicle is operating (including traveling to and from its route). Transit services that quickly fill up with passengers, such as at a park-and-ride, and travel full at high speeds to their destination will perform well on this measure.

Bubbles: The small bubbles in the graph represent the average performance within each subarea for the particular service type. The large bubbles represent the average for all the subareas for each service type. The shaded areas around the bubbles show that route performance in each of the subareas is roughly similar for the four different service types.

generally operate in higher density communities and have strong ridership in both directions and over a relatively shorter distance. The Peak Commuter routes have the highest passenger miles per platform hour (this measures the total number of rider miles relative to the total number of service hours the bus operates—from when it leaves the base until it returns). This is because these routes have fewer stops and are likely to have strong ridership in only one direction over a relatively longer distance. Hourly routes have the lowest riders per platform hour and rider miles per platform hour because this is infrequent service that provides a low level of transit access in low-density areas.

In addition to enabling Metro and the public to compare the different types of service against one another, the use of performance measures for the different families of service will ultimately allow decision makers to determine the appropriate amount of each type of service.

Peer Comparisons

The task force reviewed the performance measures that Metro currently uses to assess its transit services, as well as a variety of measures comparing Metro's services to those of 30 other transit agencies in U.S. metropolitan areas. (See Appendix 4 for comparisons on transit productivity measures.) Metro's performance measures selected for this purpose should be consistent with the National Transit Database to allow for meaningful comparisons with peer transit agencies. In addition, as the task force learned from reviewing current comparisons with peers, for these data to be useful will require a detailed and thorough analysis of why there are differences in performance measure results between Metro and the peer agencies, including exploration of similarities and differences in public policy goals, transit system objectives and system operations. This work should be completed within the next year, and it should be used to inform decisions by Metro and policy makers and made available to the public.

Sources and Uses

To understand the service performance of the transit system also requires an understanding of the source and use of the financial resources that support those services. Metro should provide information to decision makers and the public about the sources and uses of funds. To better understand how Metro is using its resources to provide transit services, the task force helped Metro staff create a series of charts showing how much of the different funding sources support each service family within each subarea. (See Appendix 5.) The task force found this to be a useful way to review how Metro is deploying funding resources and what it takes to support each family of service. This should become part of the information Metro provides to the public.

Establish Targets

This work should also include establishment of targets or objectives for each measure, so that evaluation and reporting includes actual performance against those identified targets. This will help all parties understand if individual routes and the system as a whole are achieving desired outcomes. Based on the evaluation results, Metro would decide whether to take action to adjust services, or explain why there are variations and what actions are needed to improve performance.

Reporting

Reporting on the performance measures will be instrumental in leading to increased productivity within the system. The reports should help create a focus on which portions of the system are not performing up to desired standards. The format for reporting on the performance measures should be clear and easy to understand for the public and decision makers. The reports should be posted on Metro's website and readily available to the public.

The task force subgroup on performance measures worked with Metro staff to develop an initial example of metrics for overall system performance and an easy-to-understand reporting format. (See

Appendix 5.) This was a good start on that work. The task force recommends that Metro continue developing performance measures using the draft measures as a model. In addition to developing performance measures for route evaluation and peer comparisons, the task force is suggesting that Metro develop performance measures that help evaluate all of Metro's operations, for example performance against budget, customer service, vehicle maintenance, etc. Metro currently reports on a number of these measures, but they are included in different reports and locations. The task force supports Metro's suggestion to include recommendations for the performance measurement system in Metro's Comprehensive and Strategic Plans scheduled for submittal to the County Council by February 2011.

Add a Seventh Key System Design Factor

As mentioned previously, the King County Executive and County Council identified six key system design factors, and asked the task force to recommend how and to what extent these factors should influence the design of Metro's transit system. In discussing the factors, the task force concluded that an additional policy consideration should be added: environmental sustainability. The task force developed the following definition for the additional factor:

- **Environmental Sustainability** – Transit reduces greenhouse gas emissions by reducing private vehicle travel, by reducing congestion, and by supporting compact development. Efficient transit routes should result in fewer emissions compared to comparable travel in other vehicles. Reducing congestion provides important benefits by increasing speeds for all other vehicles and thus reducing emissions and providing economic benefits. Appropriately designed public transit encourages denser land use patterns which facilitate lower overall vehicle usage.

The system of performance measures should be used to report on how the transit system is doing on achieving this policy objective, as well as the other key system design factors.

Cost Control and Efficiency

In addition to the efficiencies Metro can find in restructuring transit routes, the task force believes it is essential for the County and Metro to continue to find efficiencies in the administration and operation of the agency. The task force believes that Metro's financial model, with current revenue sources and Metro's expense structure, is not sustainable over the long-term. The subgroup that focused on cost control and efficiency noted that based on the comparisons with 30 other transit agencies around the country, Metro was in the upper quadrant of operating costs per platform hour (see Appendix 4). The subgroup explored four categories of potential cost control during their deliberations: (1) process improvements, (2) reducing the growth of expenses, (3) reducing the growth of nondirect service costs, and (4) improving bus service productivity.

Recommendation 2: King County and Metro management must control all of the agency's operating expenses to provide a cost structure that is sustainable over time. Cost control strategies should include continued implementation of the 2009 performance audit findings, exploration of alternative service delivery models, and potential reduction of overhead and internal service charges.

King County Performance Audit

The task force was briefed on the findings of the King County Auditor's 2009 performance audit of Metro, and the County Executive's response to that audit, including Metro's planned follow-up actions. The auditor identified the potential for \$30 million to \$37 million in annual cost savings, up to \$54 million in potential increased annual revenue (\$51 million would have to come from an additional fare increase), and \$105 million in one-time savings by using a surplus in the fleet replacement fund.

Metro incorporated \$12.5 million in annual savings in the 2010–2011 biennial budget based on anticipated savings from implementation of schedule efficiencies. The Auditor identified another \$3.5 million to \$8.5 million in potential annual savings from schedule efficiencies. Adult bus fares were increased in the 2010–2011 biennial budget (raising an additional \$10.8 million), but the other potential fare increases identified by the Auditor (increased monthly pass price, elimination of off-peak fare discounts, elimination of free transfers, and increased paratransit fares) have not been adopted. The one-time use of the fleet replacement fund balance was also incorporated into the budget. See Appendix 7 for a summary of the status of implementation of the audit recommendations.

Metro must continue efforts to further reduce costs, create efficiencies and implement savings strategies, including those identified in the audit. Metro must also provide regular updates on the progress it is making and its expected timetable to implement the 2009 audit findings. Additional cost control and efficiency measures could free up resources to increase the amount of service provided, reduce the scale of needed hours of service cuts or reduce the amount of new revenue needed to sustain or expand existing service.

Alternative Service Delivery Products and Models

Metro should explore opportunities to provide alternative service products and service delivery models, including contracting out for some of its underperforming fixed route services. However, the task force learned that under the terms of the existing labor contract Metro may only contract out for services up to 3 percent of Metro’s total service hours. Preliminary analysis suggests that additional contracting out could create some financial efficiencies for Metro. However, further analysis will have to consider implications of existing contracts and agreements, quality and availability of service providers, and consistency with County policies. Any contracting out of services should be consistent with broad labor harmony principles.

In addition, other types of service delivery products (such as carpools, Community Access Transportation, Vanpools, Dial-a-Ride Transit (DART), taxi scrip or Access paratransit) should be considered as alternatives to fixed route service, particularly in lower density communities. These options should be considered in locations where fixed route services are costly and are less likely to meet the travel needs of local transit users.

King County Overhead and Internal Service Charges

Metro’s operating budget includes nearly \$12 million in charges for County overhead, and approximately \$42 million in charges for internal services (services Metro purchases from various County departments). The methodologies for how these charges are allocated to Metro vary. Overhead charges are based on Metro’s full-time equivalent (FTE) staff count, Metro’s budget as a percentage of the County’s budget³, and other means. The internal services charges tend to be based on the actual recorded value of services provided, although in several cases proxies are used to estimate actual services. The overhead charges for County agencies that provide services to Metro as “enterprise” functions (e.g., the departments that charge Metro for internal services) become particularly difficult to track. In short, the internal service and overhead allocation charges are complex and not transparent.

King County should be able to provide the public with clear explanations for how and why overhead and internal service charges are allocated to County departments. In addition, in these difficult economic times, the County must continue to explore ways to reduce overall overhead and internal service charges. There must be more direct accountability for the control of overhead costs because the

³ It is not clear that these percentages equate to the relative costs of providing the services to Metro. However, many of those costs are difficult to determine, and in some cases the cost differences may not be worth the cost of assessing them.

agencies that have to pay for those costs (such as Metro) either do not have, or have not been granted the option of finding alternative, lower cost providers of service.

Overall Policy Guidance for Service Reduction and Service Growth

As the task force discussions evolved, its members came to an important realization about overall policy guidance—that one overarching statement of policy direction, and one approach to implementation of that policy, should guide all service allocation decisions. They began by discussing separate broad policy statements for service reductions and service growth. Members considered having a separate policy direction for service restoration (the restoration of transit service after hours have been reduced or suspended). However, as the task force discussions progressed, members felt that the policy statements they were crafting, along with the use of guidelines and performance measures they were recommending, should provide the foundation for all future service allocation decisions, including service reductions, service growth, service restoration, and the ongoing maintenance of transit services in response to changes in system demand or route performance.

Recommendation 3: The policy guidance for making service reduction and service growth decisions should be based on the following priorities:

- 1) **Emphasize productivity due to its linkage to economic development, land use, financial sustainability, and environmental sustainability**
- 2) **Ensure social equity**
- 3) **Provide geographic value throughout the county.**

The enabling legislation adopted by the King County Council requests that the task force develop a policy framework that establishes priorities for the key system design factors mentioned earlier in this report. As the task force discussed the key factors, they reached the conclusion that one of the factors, productivity and efficiency has a strong correlation to several of the other factors, particularly land use, economic development, financial sustainability and environmental sustainability. As a result, the task force is recommending adoption of a new policy framework to make service allocation decisions. The policy guidance described above is intended to optimize efficiency of transit services, meet the needs of those that are most dependent on transit services, and create a system that is a fair distribution of service throughout the county.

The task force has attempted to provide clarity about this policy statement by defining each of the three terms as follows.

- **Emphasize Productivity.** Metro should create a system that results in high productivity and service efficiency based on performance measures for different families, or types, of transit services (see Recommendation 4 regarding performance measures). The task force felt that establishing a highly cost-effective system, particularly in these challenging economic times, is essential for reducing the gap between revenues and expenses, and for building public confidence and trust in the transit system. A focus on productivity will also help accomplish other key policy objectives:
 - **Economic Development** – A highly productive system will achieve the largest number of work trips at all times of the day and days of the week via transit. Transit service will also create connections to/from “demand collectors” such as high-use park-and-ride lots, and colleges and universities.
 - **Land Use** – An emphasis on productivity will result in support for regional and local growth plans by concentrating transit service coverage and higher service levels in corridors where residential and job density support transit and are greatest.

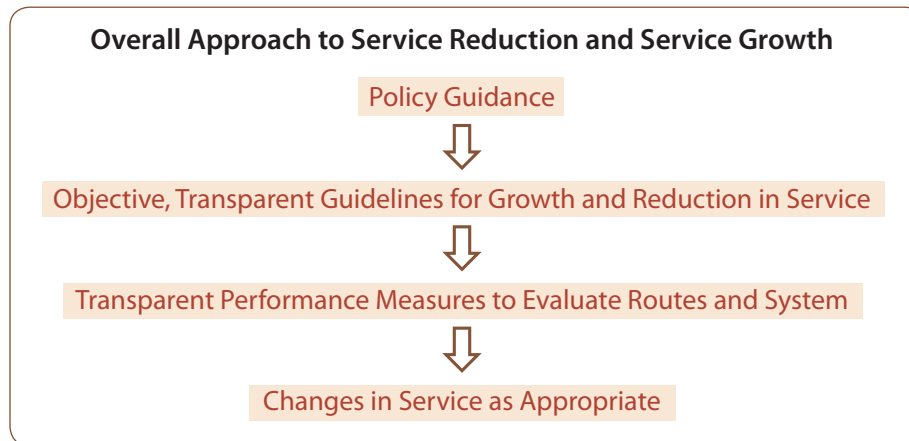
- Financial Sustainability – Productivity will result in higher ridership and fare revenues, and lower cost per rider. A premium will be placed on serving the most number of people. In addition, highly productive service will result in decisions that create greater service efficiency, such as combining routes that serve the same corridor, or modifying local service to feed high ridership corridors or locations.
- Environmental Sustainability – An emphasis on productivity will encourage denser land use patterns, which facilitate lower overall vehicle usage and will help reduce greenhouse gas emissions. Also efficient transit routes should result in fewer emissions compared to comparable travel in other vehicles.
- **Ensure Social Equity.** The task force felt that it is imperative for any future allocation of service to provide transit services to those who have no, or limited, transportation options. They defined Social Equity and Environmental Justice to mean using transit service to address gaps in mobility, and to avoid or mitigate disproportionately high and adverse social, economic or human health impacts for populations that have limited transportation options, including youth, students, elderly, disabled, people of color, those with limited English proficiency, and economically disadvantaged communities. In addition to considering trip origins for people with limited transportation options, consideration should be given to destinations for employment, education, healthcare, social services and other civic engagement activities.
- **Provide Geographic Value.** Service allocation decisions (for both reductions and growth) must be perceived as “fair” throughout the county. To accomplish the appropriate balance, Metro must use a multi-faceted approach to achieve an integrated regional transit system. As such, the distribution of transit services must be influenced by the value delivered to all areas of King County, as represented by the following:
 - Balancing Access with Productivity – The public in all corners of the county expects government services to be run as cost efficiently and effectively as possible. Public investments in transit services must be appropriate to the land use, employment densities, housing densities and transit demand in various communities. This will require a variety of service strategies including traditional fixed route and other transit and rideshare products appropriate to the community and the level of ridership demand. Some type of transit service must be available in all communities served by transit today.
 - Tax Equity – There must be some relationship (but not an exact formula) between the tax revenue created in a subarea and the distribution of services. There should also be recognition of all of the revenues (taxes and fares) generated in the various areas of the county.
 - Economic Vitality – Transit investments are critical for economic recovery and future growth of the region. Transit services must get the greatest number of workers to and from job centers and support access to destinations that are essential to countywide economic vitality (such as centers for post-secondary education or major medical centers).

Implementation of Policy Direction: Use of Guidelines and Performance Measures

The task force believes that a new approach to decision making is needed to successfully implement their recommended policy direction. Members felt strongly that if King County no longer uses a formula-based approach to allocate service, stakeholders must understand the basis for service allocation decisions, including the ongoing maintenance and operation of the system. and how those decisions will be evaluated and adjusted over time. Therefore, the task force is recommending the

development and adoption of service guidelines and performance measures (described above) as essential elements for carrying out the new policy direction. The following graphic describes this approach.

Figure 6. Overall Approach



Recommendation 4: Create clear and transparent guidelines to be used for making service allocation decisions, based upon the recommended policy direction.

Service guidelines establish the objective metrics for making service allocation decisions. Guidelines should be used to help the public, Metro and King County decision makers determine the appropriate level and type of service for different corridors and destinations, and for varying employment and population densities throughout the county. The guidelines should be applied consistently and fairly on a systemwide basis to make decisions that are easy to understand and that reflect the overall policy guidance established by the County.

Guidelines will be established for each of the different types (and families) of Metro transit services. The guidelines should be used to help Metro make decisions regarding the frequency of service, route spacing, the directness of the service (i.e., whether transfers are appropriate), stop spacing, and the appropriate speed and loading of routes. The task force supports Metro’s proposal to incorporate newly developed guidelines into Metro’s Comprehensive and Strategic Plans to be submitted to the County Council in February 2011. This will insure prompt development and use of this new approach.

Metro will develop guidelines that can be applied for service reduction and for service growth, as well as for ongoing management of the transit network during times of stability.

The task force did not develop recommended guidelines. They did, however, create a set of principle statements that should be used to shape the creation of the guidelines. The following statements should apply to all guidelines.

Recommendation 5: Use the following principles to provide direction for the development of service guidelines.

- **Transparency, Clarity and Measurability** – Guidelines will be based in data that are understandable to the public, will use industry best practices, and will be used to measure the relative performance of service investments and the transit system’s progress toward achieving King County goals and objectives. The process for making service allocation decisions should be transparent and replicable by internal and external stakeholders.

- **Use of the System Design Factors** – Guidelines will reflect the system design factors. They will be incorporated in the guidelines to determine appropriate service design, service investment, service type and service delivery method.
- **Flexibility to Address Dynamic Financial Conditions** – Guidelines should apply in times of financial health, when Metro is managing and growing services, as well as in times of financial difficulties, when Metro is reducing services. Guidelines will be used to determine when service changes will be made and will apply for normal system adjustments, increases, decreases, restructure, start-up and ongoing management of bus routes.
- **Integration with the Regional Transportation System** – Guidelines will address the fact that King County’s transit system is a network of services provided by Metro, Sound Transit, ferries, and other public and private providers, and should ensure that the regional transportation system serves population and employment centers identified in the regional growth plan. The integration with light rail, commuter rail, ferry and bus services provided by partner agencies, employers and others is required to provide an efficient network of services that is attractive to use.
- **Development of Thresholds as Basis for Decision-Making on Network Changes** – Guidelines will identify conditions or performance thresholds for Metro to respond to changes in demand prompted by household and employment growth, economic conditions, or related to route and/or system performance.

Examples of Guidelines for Conceptual Service Reduction Scenarios

The task force requested that Metro staff create conceptual scenarios for service reduction using the draft policy guidance and a set of accompanying example guidelines to make service reduction decisions. Although this work was presented as illustrative of what an actual service reduction proposal could look like, the task force wanted to see the results of this work in order to understand the practical implications of how service would be affected across King County. Metro presented a sample set of guidelines but stated that they were developed quickly, and that a formal proposed set of guidelines would take several months to create for public review and comment. Nonetheless, the five sample guidelines were instructive for the task force. (See Appendix 8 for the illustrative guidelines presented to the task force.)

The task force supported the general approach, but also stated that when the guidelines are developed for service reductions, they should also include provisions for supporting employment and economic development.

Metro described their initial approach to using the guidelines as a three-step process.

- The first step was to screen for productivity, eliminating the least productive routes.
- The second step was to assess network considerations after the first step. Routes (and service hours) were added back based on consideration of social equity, system connectivity, and addressing gaps in geographic coverage.
- Since the second step added back service hours, the third step was to identify opportunities for efficiencies in the system (for example, shortening a route if the beginning or end of the service had low ridership, or using local service to connect riders to ST Express bus service).

The task force encouraged Metro to continue to develop this type of approach for utilizing the guidelines to make service reduction decisions.

Examples of Guidelines for Conceptual Service Growth Scenario

The task force went through a similar exercise with service growth guidelines. Metro staff presented a sample set of guidelines for illustrative purposes to demonstrate how they could be used to make transit service growth decisions. The task force identified two different types of future service growth: (a) response to ridership demand (providing new service to address over-crowded bus routes), and (b) support for regional growth (providing new service to connect identified population, employment and activity centers).

- **Response to Ridership Demand.** The sample guidelines for responding to high ridership established thresholds for passenger loads for each type of service. For example, for commuter or hourly service, if the number of seats filled and the number of standees exceeded the threshold, then action would be taken. Actions could include adding trips to the schedule, working with jurisdictions to improve transit speed and reliability, or reallocating service from less productive routes.
- **Support for Regional Growth.** For service that supports regional growth, Metro presented conceptual guidelines that would create a point system to determine minimum levels of service for corridors and communities. Metro would set the minimum frequency of service for a route based on the number of points scored. (See Appendix 8 for the illustrative guidelines presented to the task force.)

Task force members liked this approach because it would allow for service allocation decisions to respond to changed conditions over time, and it would enable the transit system to support local and regional growth and development plans as they are implemented. The guidelines would provide clear, transparent criteria for how and when service frequency could be increased. This would allow local communities to understand the public transportation implications of their land use, planning and development decisions. The use of these types of guidelines could create an incentive for local communities considering higher density residential or employment growth. Cities and towns would have a clear understanding of the kind of densities and transit demand that would need to be achieved to increase service levels, provided adequate funding for service increases is available.

In addition, the task force noted that Metro should continue to explore and take advantage of partnerships with local jurisdictions, businesses and agencies that would like to purchase increased service levels, or make capital investments to improve transit speed and reliability in return for increased levels of service.

Like the service reduction guidelines, the sample service growth guidelines will require additional work before they could be incorporated into Metro's proposed Comprehensive and Strategic Plans for public review.

Legislative Agenda to Address Future Service Needs

One of the charges to the task force was to provide recommendations regarding potential state and/or federal legislative initiatives to support the future of Metro services envisioned by the task force. As background for this discussion, the task force reviewed updated sales tax revenue forecasts for the next four-year period, the forecast for potential reductions in bus service hours given the actual and projected drop in revenues, the actions taken by King County in the current biennial budget period (2010–2011) that would affect annual operating costs, and a potential list of revenue options.

Defining the Need for Legislative Action

Earlier in this report Figure 4 provides a graphic representation of the anticipated revenue shortfall of \$1.176 billion between 2009 and 2015. When the 2010–2011 budget was adopted, the County

projected that if no additional actions were taken, approximately 600,000 hours of service would need to be eliminated by 2015. (As an illustration of the order of magnitude, 600,000 hours of service is equivalent to all transit service provided in the East subarea, or all Metro transit service provided on weekends.) Metro has not revised the estimate of potential service reductions, but the task force was told that the updated sales tax forecast completed in August could result in the need for larger service reductions than originally anticipated.

Based on an estimated 600,000 hours of service reduction by 2015, Metro staff calculates that \$74 million would be needed annually by 2015 to retain 2011 transit service levels, or a total of \$117 million annually to retain current service and implement the remaining portion of Transit Now services.

The loss of revenue is particularly acute during periods of steep economic downturn because 62 percent of Metro's operating revenues are from one source—the local option sales and use tax. Another 26 percent is from rider generated fares. In other words, 88 percent of the operating revenues needed to support Metro transit services come from these two sources. The heavy reliance on sales tax makes Metro susceptible to service cuts during economic downturns.

The reliance on a single large revenue source such as sales tax has made it difficult to fully meet the service levels approved by King County voters through the Transit Now ballot initiative (a one-tenth of a percent increase in the local sales tax). This puts Metro in the difficult position of not being able to meet the expectations of voters.

Of course, addressing major budget challenges requires consideration of two strategic courses of action: expense reduction and revenue enhancement. The actions taken by Metro and King County in the 2010–2011 biennial budget, described earlier in this report, will result in ongoing annual savings of approximately \$38 million, and approximately \$30 million in new annual revenues (as the result of fare increases and property tax). Those initiatives help reduce the impact of the revenue shortfall. The task force has made it clear with earlier recommendations that they believe that King County and Metro must continue the work to find additional cost savings and efficiencies as part of the strategy to address the revenue shortfall.

While additional expense reduction is recommended, it is clear from the data reviewed by the task force that for Metro to achieve near-term service objectives (minimize the extent of service reductions) and long-term service objectives (support regional population and employment growth and economic development activities) a combination of both expense reduction and revenue enhancement will be required.

Recommendation 6: King County, Metro, and a broad coalition of community and business interests should pursue state legislation to create additional revenue sources that would provide a long-term, more sustainable base of revenue support for transit services. To build support for that work, it is essential that King County adopt and implement the task force recommendations, including use of the service guidelines and performance measures, and continued efforts to reduce Metro's operating costs.

Several factors made it clear to the task force that long-term, sustainable revenues for transit service are needed: (1) the dramatic fluctuations in Metro's primary source of revenue (sales tax); (2) the magnitude of the likely service reductions over the next five years; (3) the importance of the transit system to the economic recovery in King County; and (4) the need for significant future growth of the transit system to support the population and employment projections for the county.

Characteristics of Long-Term, Sustainable Revenue Source(s)

The task force did not recommend specific revenue sources, but did describe several characteristics that will need to be achieved for a long-term revenue strategy to be successful.

- **Diversify revenue sources** – Metro should have a wider variety of revenues available to create more stability in its operations.
- **Sufficient in size to address long-term needs** – The revenue source(s) should be able to provide significant support for both the retention of current core service levels, as well as allow for the future increase in service levels.
- **Flexibility** – A successful long-term strategy could include a stable statewide funding source for transit and/or a local option for creating a revenue source.

Begin Making the Case Now

King County and Metro should work to create a coalition of partners to begin immediately to inform state legislative leaders about the breadth of the potential service reductions facing the Metro system, the recommendations of the task force, and the past and future actions taken by Metro and King County to address the anticipated revenue shortfall. Task force members believe that it may take several legislative sessions to secure support for a long-term, sustainable funding initiative. Given the size of the annual potential service reductions between 2012 and 2015, the task force believes this work should begin as soon as the upcoming 2011 legislative session.

Mission and Vision

The original work plan adopted by the County Council requested the task force to concur with or propose changes to the vision and mission statements for Metro. The task force spent a great deal of time during its seven months of deliberation discussing the core purposes (mission) of Metro transit services, as well as future transit needs to support the projected growth in the region (the vision). However, it did not create a mission or vision statement for Metro.

Recommendation 7: Metro staff should use the task force recommendations and discussions as the framework for revising Metro's current mission statement, and creating a vision statement (as one does not now exist). Both draft statements should be included in the draft Comprehensive and Strategic Plans scheduled to be submitted to the County Council in February 2011.



Conclusion

The Regional Transit Task Force was formed to recommend policy guidance to the King County Executive and County Council regarding the future of Metro transit service delivery. The issues the task force was asked to address were complex and challenging. But the task force has created consensus recommendations that reflect a new direction for making transit service allocation decisions.

The backdrop of the national and regional recession certainly had an impact on how members viewed their charge. Whether it was in discussions about cost control and efficiencies, the use of performance measures to evaluate route and system performance, or creating service allocation policies that meet the needs of transit dependent populations, determining a new way to making transit policy decisions in these extraordinary times was the context for most task force discussions. At the same time, the group was mindful that the economy will recover, and the transit system is integral to meeting the land use, housing, and economic development goals of the regional *Vision 2040* plan and local plans adopted by King County jurisdictions.

Task force members were asked to represent the interests of their constituents, absorb a tremendous volume of information and data, listen to one another's interests and perspectives, and in the end, create recommendations that are in the best interests of all King County residents. By the conclusion of the group's seven months of intense work, they were able to successfully accomplish that goal.

The task force has developed a set of recommendations that, if adopted, will establish a new policy direction of transit service reductions and future service growth. They have recommended a method for decision-making that will result in greater clarity, transparency and perceived fairness in decisions allocating Metro transit services.

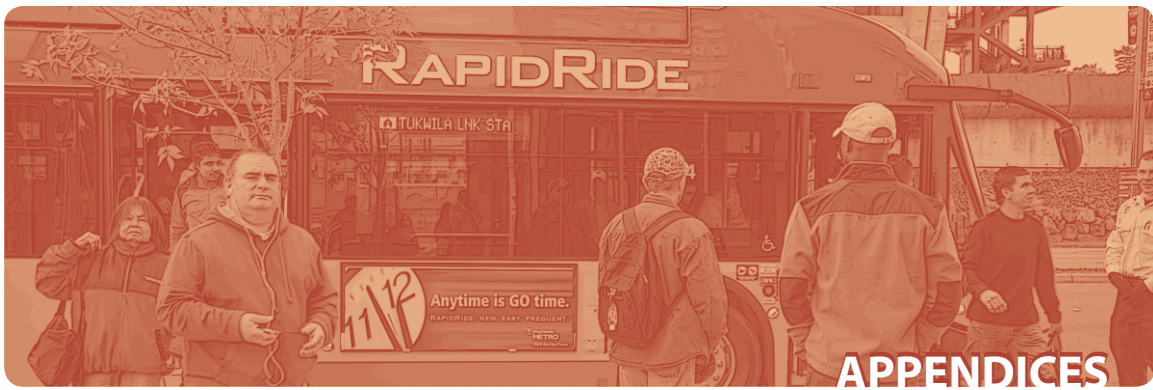
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Appendix 1: Abbreviations and Glossary

ADA: Americans with Disabilities Act

CAT: Community Access Transportation

CTR: Commute trip reduction

DART: Dial-A-Ride Transit

FTE: Full-time equivalent

HOV: High-occupancy vehicle

OEFA : Office of Economic and Financial Analysis (King County)

PSRC: Puget Sound Regional Council

RTTF: Regional Transit Task Force

Access (paratransit) service: A van service with no fixed route or schedule that provides trips to customers who have difficulty using Metro's regular service. Access service provides next-day, shared rides within three-quarters of a mile on either side of noncommuter fixed route bus service during the times and on the days those routes are operating. The program serves persons age 6 and up. Eligibility is based on whether a disability prevents the person from performing the tasks needed to ride regular bus service some or all of the time. Those interested must apply and be found eligible ahead of time to use this program. Potential applicants must complete a pre-application prior to receiving an application. Applications must be co-signed by a health care professional.

Boarding: A passenger who gets onto a transit vehicle. The number of boardings is a count of the number of people who have ridden on the vehicle.

Core cities: As adopted by the PSRC and used in *Vision 2040*, cities containing regional growth centers or manufacturing/industrial areas that are connected by major transportation corridors. PSRC identifies 10 core cities in King County: Auburn, Bothell, Burien, Federal Way, Kent, Kirkland, Redmond, Renton, SeaTac and Tukwila.

Deadhead time: The scheduled time of a transit vehicle spent driving to and from the base or between trips on different routes.

Family of services: Distinct types of fixed route transit service, defined by the areas served, and the function and characteristics of the service (i.e., frequency, and hours/days of service). Includes: Frequent Arterial, Hourly, Local, and Peak Commuter.

Fixed route services: These services operate on a predetermined route and schedule, connecting multiple population and employment centers throughout the county. Most Metro resources are spent providing fixed route services and most rides are taken on the fixed route network.

Frequent arterial service: A family of transit service that includes the planned RapidRide bus rapid transit corridors and other routes that operate frequently (5 to 20 minutes) during at least some period during the day, and at least every 30 minutes for a span of 16 to 18 hours per day. The Frequent Arterial routes provide two-way service primarily on principal arterials, providing connections to, between and within the region's major employment and commercial centers. These routes have the highest riders per platform hour.

Guidelines: See Service guidelines.

Hourly service: A family of transit service that expends the minimal resources needed to provide basic transit service access and coverage in low-density, low-use areas, providing frequencies no better than every 60 minutes at any time of the day. Hourly routes provide connection to activity within the local community or where connections to other transit services are available.

Internal services: This refers to services purchased by Metro from other King County departments. For Metro, these services include information technology services, printing, the Prosecuting Attorney's office, and public safety services (i.e. transit police provided by the King County Sheriff's office). If Metro did not purchase these services from other County departments they would have to purchase them from other providers or hire staff to perform these services.

Key System Design Factors: A set of policy factors identified by the County Executive and County Council in the enabling legislation for the Regional Transit Task Force. The task force was asked to make recommendations on how and to what extent these policy factors should be reflected in the design of King County's transit system. Originally six key factors were identified, and the task force added a seventh (environmental sustainability). The task force defined the factors as follows:

1. **Land use:** Support for regional and local growth plans by concentrating transit service coverage and higher service levels in corridors where residential and job density is greatest.
2. **Social equity and environmental justice:** Providing transit services to those who have no or limited transportation options. Addresses gaps in mobility, and avoids or mitigates disproportionately high and adverse social, economic or human health impacts for populations that have limited transportation options, including youth, students, elderly, disabled, people of color, those with limited English proficiency, and economically disadvantaged communities. In addition to considering trip origins for people with limited transportation options, consideration should be given to destinations for employment, education, healthcare, social services and other civic activities.
3. **Financial sustainability:** Higher ridership and fare revenues, and lower cost per rider. Transit design places a premium on serving the most number of people, and creates greater service efficiency, such as combining routes that serve the same corridor, or modifying local service to feed high ridership corridors or locations.
4. **Geographic value:** Service allocation decisions (for both reductions and growth) that are perceived as "fair" throughout the county. To accomplish the appropriate balance, Metro must

use a multi-faceted approach to achieve an integrated regional transit system. The distribution of transit services influenced by the value delivered to all areas of King County, as represented by the following factors.

- ◇ **Balancing access with productivity.** The public in all corners of the county expect government services to be run as cost efficiently and effectively as possible. Public investments in transit services must be appropriate to the land use, employment densities, housing densities and transit demand in various communities. This will require a variety of service strategies including traditional fixed route and other transit and rideshare products appropriate to the community and the level of ridership demand. Some form of transit service must be available in all communities served by transit today.
 - ◇ **Tax equity.** There must be some relationship (but not an exact formula) between the tax revenue created in a subarea and the distribution of services. There must also be recognition of all of the revenues (taxes and fares) generated in the various areas of the county.
 - ◇ **Economic vitality.** Transit investments are critical for economic recovery and future growth of the region. Transit services must get the most number of workers to and from job centers and support access to destinations that are essential to countywide economic vitality (such as centers for post-secondary education or major medical centers).
5. **Economic development:** Achieving the largest number of work trips at all times of the day and days of the week via transit, and creating connections to/from “demand collectors,” such as high-use park-and-ride lots, and colleges and universities..
 6. **Productivity and efficiency:** A system that results in high productivity and service efficiency based on performance measures for different families, or types of transit services. A highly cost-effective system is essential for reducing the gap between revenues and expenses, and for building public confidence and trust in the transit system. A focus on productivity will also help accomplish other key policy objectives: economic development, land use and financial sustainability.
 7. **Environmental sustainability (added by the task force):** Transit reduces greenhouse gas emissions by reducing private vehicle travel, by reducing congestion, and by supporting compact development. Efficient transit routes should produce fewer emissions than comparable vehicles. Reducing congestion provides important benefits by increasing speeds for all other vehicles and thus reducing emissions and providing economic benefits. Appropriately designed public transit encourages denser land use patterns which reduces overall vehicle usage.

Local service: A family of transit service that operates no better than every 30 minutes at any time of day and often operates primarily in daytime hours or less than seven days per week. Local routes serve lower density residential and smaller activity areas, and connect to Frequent Arterial and Peak Commuter services that provide regional connections and mobility. Local routes operate on principal and minor arterials, and may favor access (the number of stops) over speed of the service. The time between buses (headway) may be based on policy rather than demand.

Metric: A standard of measurement, such as for assessing performance in a particular area.

Metropolitan cities: As adopted by PSRC and used in *Vision 2040*, the five largest cities in the region. Two are in King County—Bellevue and Seattle.

Partnership agreements: Agreements between Metro and a business, local jurisdiction or other government agency for Metro to develop and implement additional transit service. These partnerships take two forms:

- **Direct financial participation.** The partner agrees to pay some portion of the cost of delivering a particular service investment. In Transit Now, for example, the partner’s minimum commitment to expand an existing route was \$100,000 per year for five years, or for a new route, at least \$200,000 per year for five years.
- **Capital investment to improve speed and reliability.** A local jurisdiction partner makes a capital investment or traffic operations change to improve transit speed and reliability in a “core service connection” corridor and Metro provides a match of annual service hours for each core route in the designated corridor.

In addition to these partnerships, in which partners contribute one-third of operating costs or invest in transit speed and reliability along an entire corridor, Metro partners with several jurisdictions in the delivery of passenger facility improvements and in other transit speed and reliability projects, such as signal priority and transit lanes.

Peak commuter service: A family of transit service that operates during the peak weekday travel periods to provide direct service to regional employment centers. These routes are designed to meet the peak of commuter demand and to provide competitive travel options to driving alone. Peak Commuter routes operate primarily on the region’s high-occupancy vehicle (HOV) system or principal arterials in areas where densities are sufficient to support access by foot. Peak Commuter routes in suburban areas often pick up riders at park-and-ride lots, but may have “tails” that end in neighborhoods. These routes have a target average of 0.8 passengers to seats ratio (80 percent average load) through the peak demand period.

Performance measure: A numeric description of an agency’s work and the results of that work, which helps the agency identify what is working well, and what may need to be improved or changed.. “Performance measures are based on data, and tell a story about whether an agency or activity is achieving its objectives and if progress is being made toward attaining policy or organizational goals. ...The best performance measures start conversations about organizational priorities, the allocation of resources, ways to improve performance, and offer an honest assessment of effectiveness” (State of Washington Office of Financial Management, 2009, pp. 2-3).

Platform hours: The number of hours buses are on the road for a given route. This includes time on the scheduled trip (revenue hours), layover time and time spent driving to and from the base or between different routes (deadhead time). (Compare to revenue hours, which *does not* include layover and deadhead time.)

Principles: See Service principles.

Productivity: The efficiency and effectiveness of a bus service or network. Often expressed as “rides per platform hour” or “rides per revenue hour.” Colloquially, riders on the bus (the more riders, the more productive the route is).

Revenue hours: The number of hours buses are operating scheduled trips for a given route. Does *not* include layover or deadhead time. (Compare to platform hours, which *does* include layover and deadhead time.)

Ride: A single passenger using a single transit vehicle for a segment of that passenger’s trip.

Rider miles per platform hour: A measure of productivity of transit service that provides the total number of rider miles relative to the total number of service hours a transit vehicle operates (from leaving the base until it returns). Services that have a strong ridership and fewer stops over a longer distance, such as Peak Commuter service, will rate well on this measurement.

Riders per platform hour: A measure of productivity of transit service that provides the number of people who board a transit vehicle relative to the total number of hours that vehicle operates (from leaving the base until it returns). Services in high-density communities with a fairly high number of riders over a relatively short distance, such as Frequent Arterial service, will rate well on this measurement.

Ridership: A way of measuring the success of a bus service or network. Often expressed in average number of passengers getting on a transit vehicle (boardings) per weekday.

Scenario: A summary that illustrates what effect a concept or projected course of action would have.

Service guidelines: Statements that establish the objective metrics for making service allocation decisions. Guidelines specify the criteria for designing transit services. Guidelines are used to determine appropriate locations of different types of routes, as well as various operating characteristics, such as appropriate levels of service, hours of operation and stop distances. Guidelines specify how transit service will be designed and measured, and the circumstances that call for service modification.

Service principles: Underlying values or assumptions that shape service guidelines. They apply to an entire set of guidelines. Examples are: transparency, clarity and measurability, and use of system design factors.

Service type: The variety of transit products Metro provides to meet the diverse travel markets and mobility needs of county residents. The different types of service include Bus Rapid Transit (RapidRide), regular fixed routes, demand responsive service (Dial-a-Ride Transit – DART), ADA required paratransit (Access), taxi scrip, Community Access Transportation programs, Vanpools, and ride-matching services.

Target: The level or degree of improvement, or desired level of performance, on a specific performance measure, usually stated in numerical terms.

Transit service: A reference to the full range of service types provided by Metro.

Transparency/transparent: Making government processes, information and decisions open, accessible and understandable to the public. The federal government's Transparency and Open Government directive says: "Transparency promotes accountability and provides information for citizens about what their government is doing." Transparency in decision making will allow all stakeholders to understand why and how decisions are made.

Trip: A single passenger's movement from the point where that person gets on a transit vehicle (origin) to where the person gets off the vehicle (destination). A trip may include several rides.

APPENDIX 2: Enabling Legislation

Clerk 02/02/2010

..Title

A MOTION relating to a regional task force on King County's transit system.

..Body

WHEREAS, King County operates a transit system comprised of more than three million annual service hours delivering more than one hundred ten million rides per year, and

WHEREAS, this transit system is an important element of meeting regional growth management objectives through the high-occupancy movement of people throughout the county and region, and

WHEREAS, this transit system, due to its dependence on the volatile revenue source of sales tax, has been assailed by financial challenges associated with the global recession, and

WHEREAS, the King County council has worked in close collaboration with the executive to address more than a \$200 million deficit for the 2010/2011 biennium, and

WHEREAS, Ordinance 16717 was adopted requiring the executive to transmit a work plan for a regional task force to consider a policy framework to guide the growth and, if necessary, contraction of King County's transit system;

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

A. The executive should develop a work plan that convenes a task force by March 2010 that is charged with:

1. Exploring the transit system in King County based on key system design factors of land use, social equity and environmental justice, financial sustainability, geographic equity, economic development and productivity and efficiency;

2. Making recommendations on how and to what extent these factors should be reflected in the design of King County's transit system;

3. Exploring system integration and making recommendations regarding King County Metro's role within the region's public transportation and overall transportation system; and

4. Recommending a policy framework to the executive and council that reflects prioritization of the key system design factors. The framework should include:

a. concurrence with, or proposed changes to, the vision and mission of the King County transit system;

b. criteria for systematically growing the transit system to achieve the vision;

c. state and federal legislative agenda issues to achieve the vision;

d. strategies for increasing efficiency of the King County transit system; and

e. criteria for systematically reducing the transit system should revenues not be available to sustain the King County transit system.

B.1. The executive should transmit by February 10, 2010, for council confirmation by motion, task force membership with the following executive-level representation:

a. six currently elected officials with equal representation from each of the three King County transportation subareas, provided that at least one south subarea representative shall be an elected official of a city on the southwestern ridge and no more than one west subarea representative shall be an elected official of the city of Seattle, and no more than one east subarea representative shall be an elected official of the city of Bellevue;

b. three representatives of business and economic development interests with equal representation from each of the three King County transportation subareas;

c. two representatives of organized labor;

d. six representatives of countywide rider interests with equal representation from each of the three King County transportation subareas and including two representatives of educational interests with representatives from different King County transportation subareas, two representatives of social service interests with representatives from different King County transportation subareas, and two large employers representing commuter and commute trip reduction interests with representatives from different King County transportation subareas;

e. one representative of a good government civic organization;

f. two representatives of environmental concerns;

g. two transportation experts;

h. three rider or citizen representatives with equal representation from each of the three King County transportation subareas;

i. one member of the transit advisory committee representing the range of views of the committee; and

j. one representative of the Puget Sound Regional Council.

2. The executive should strive to identify task force members who are broad thinkers that understand multiple stakeholder views, committed to livable communities, collectively represent a balanced geographic distribution, including rural representation and representation from the Rapidly Developing Areas as defined in the Strategic Plan for Public Transportation, and are open to addressing the charge of the task force without being bound by previously held positions. Additionally, the overall task force membership should reflect the racial, gender and economic diversity of King County.

3. The King County transit division manager, the Sound Transit senior staff member and a Washington state Legislature Joint Transportation Committee staff member shall be nonvoting members of the task force.

C. A third-party facilitator, who is not an employee of King County at time of hiring, should be hired by the executive to lead the work of the task force based on the guidance of the executive committee and the support of the interbranch working group.

D.1. The executive committee should consist of the King County executive and three King County councilmembers with equal representation from each of the three King County transportation subareas, without designees.

2. The chair of the regional transit committee, without designee, should be the alternate to the executive committee.

3. The King County councilmembers shall be appointed to the executive committee by the chair of the King County council per OR-1-020 of the council's Organizational Compilation.

4. In a balanced legislative and executive branch approach, the executive committee is charged with overseeing the task force schedule and process relative to the council-approved work plan objectives and charge as transmitted by the executive in accordance with Ordinance 16717, without influencing the substance or content of task force deliberations; and offering to act as a sounding board during the development of actionable recommendations.

E.1. An interbranch working group shall support the executive committee and the task force through comprehensive review and preparation of data and materials.

2. The interbranch working group shall consist of King County executive, transit division and council staff.

F. The work plan transmitted by the executive in accordance with Ordinance 16717 should contain subject areas for meetings with the goals of:

1. Achieving task force comprehension of transit system building blocks by May 2010;
2. Developing policy options for discussion by July 2010; and
3. Adopting final policy recommendations by September 2010.

G. The agendas for the task force meetings shall be developed by the facilitator with guidance from the executive committee and support from the interbranch working group to achieve the objectives in subsection A. of this motion.

H. The work plan should designate a project manager to oversee the day-to-day needs of the transit task force program, oversee the facilitator contract and coordinate the development and review of materials for the task force.

APPENDIX 3: Task Force Ground Rules

Ground Rules Regional Transit Task Force

1. All meetings will be open to the public.
2. Meetings will start and end on time.
3. The task force is comprised of people with a variety of perspectives and interests. Differences of opinion are to be expected and will be respected by the task force and its members. Task force discussions will be characterized by careful deliberation and civility.
4. The task force is encouraged to think creatively about potential solutions for the issues the group has been asked to address. Task force members will agree to keep an open mind to possible new ideas that meet the interests of all parties. Task force members will work to understand the different points of view and perspectives of other members. Questions to better understand each member's interests are encouraged.
5. The task force will operate by consensus. The goal will be to reach unanimous consensus in which all members can support, or live with the task force recommendations. If unanimous consensus cannot be reached differences of opinion will be noted and included as part of the task force final recommendations.
6. The task force is advisory to the County Council and County Executive. It is not a decision-making body.
7. The task force does not plan to take formal public testimony. However, the task force will accept questions or comments from the public at the conclusion of meetings.
8. Task force members are strongly encouraged to participate in every meeting to achieve continuity in discussions from one meeting to the next. If members cannot attend a meeting it is his/her responsibility to be informed about the topics discussed by the next meeting. An absent member may ask someone to attend a meeting on their behalf to listen to the discussion, but that person will not be able to participate in discussions or votes.
9. If a task force member cannot attend a meeting and wishes to make a statement regarding an issue that is on the agenda for that meeting, he or she may provide the facilitator or the project manager with a written statement, which will be read to the full group when the issue is being considered by those present at the meeting.
10. Meeting materials will be sent via email to task force members in advance whenever possible. Any handouts at meetings will be emailed to members who were not present.
11. Meeting summaries will be prepared and distributed via email to all task force members in a timely manner. The summaries will also be posted on the project web site.
12. Any member may speak to the media or other groups or audiences regarding issues before the task force, provided s/he speaks only for her or himself. Inquiries from the media or others can be directed to the facilitator or project manager. Members are encouraged to let the process reach

its conclusion before describing potential strategies or ideas as task force recommendations. Members agree to bring issues or concerns to the task force before raising them with others in a public fashion.

13. It is understood that task force members cannot unilaterally make commitments on behalf of their respective organizations. However, each member will work hard to understand any issue or concern raised by their organization and will communicate those issues in a timely fashion to the full task force.
14. The facilitator will communicate with task force members between meetings to understand issues and search for consensus on solutions.
15. Metro staff will be responsive to the information requests from the task force. However, it may not be possible to meet all information requests. Any information requests outside of the task force meetings should be made through the Metro project manager or the facilitator.

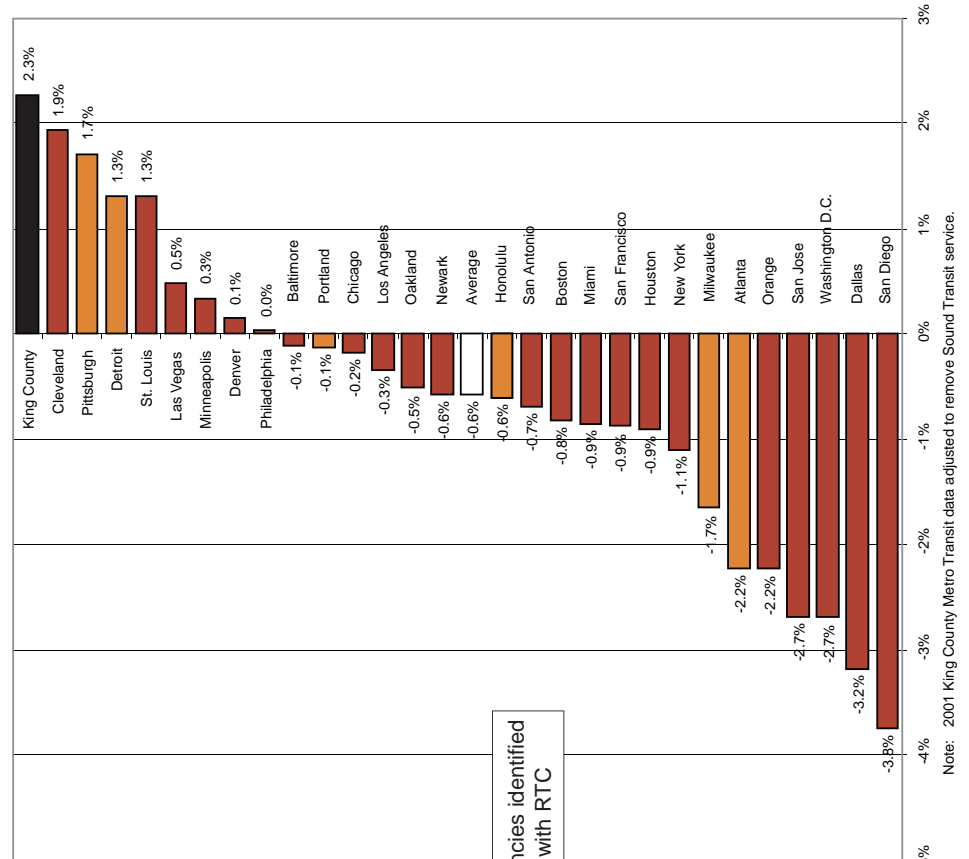
Role of the Facilitator

- In addition to the roles described above, the facilitator will work with the task force and Metro staff to set the agendas for meetings.
- Work to resolve issues regarding process or schedule
- Open the meetings and manage the flow and timing of the topics on the agenda
- Prepare any draft recommendations based on task force discussions
- Serve as a task force liaison with County elected official

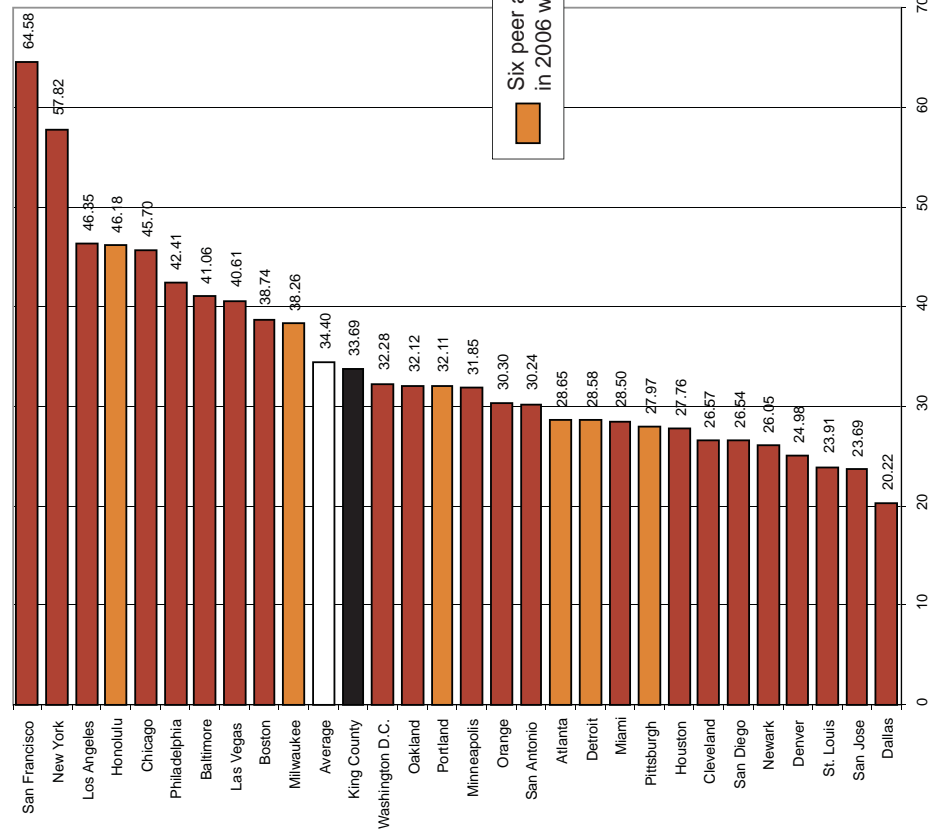
APPENDIX 4: Metropolitan Transit Agency Comparisons on Productivity Measures

Transit Productivity Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Boardings Per Platform Hour, 2001 to 2008



Boardings Per Platform Hour, 2008

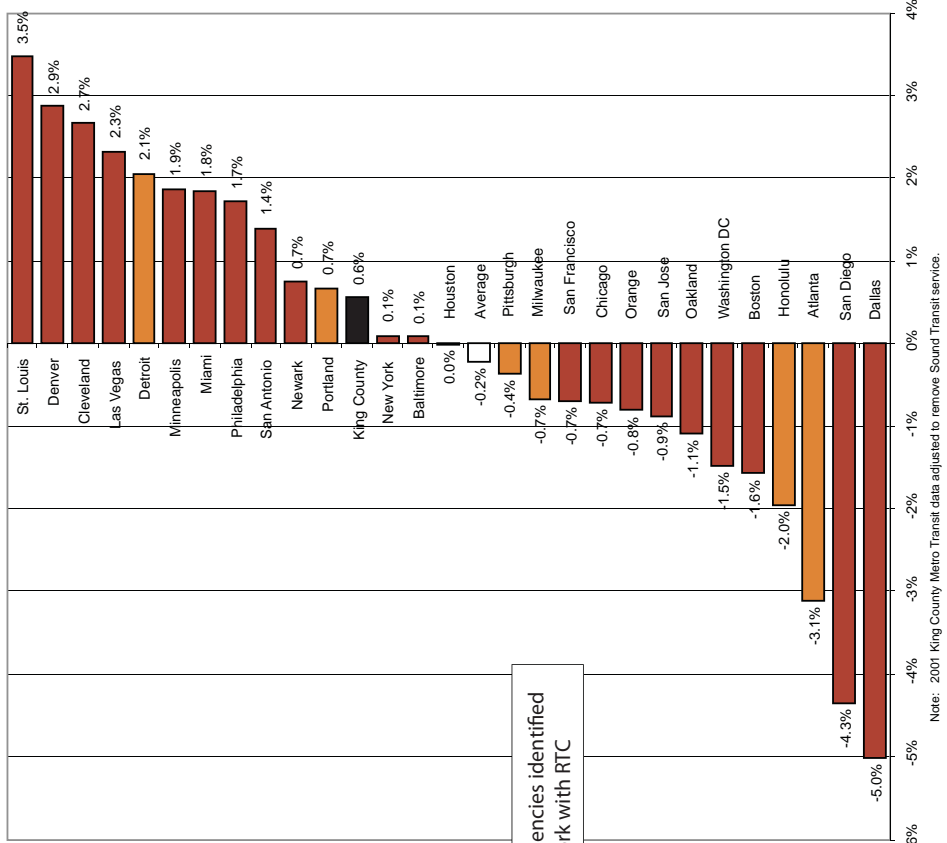


Note: 2001 King County Metro Transit data adjusted to remove Sound Transit service.

Transit Productivity

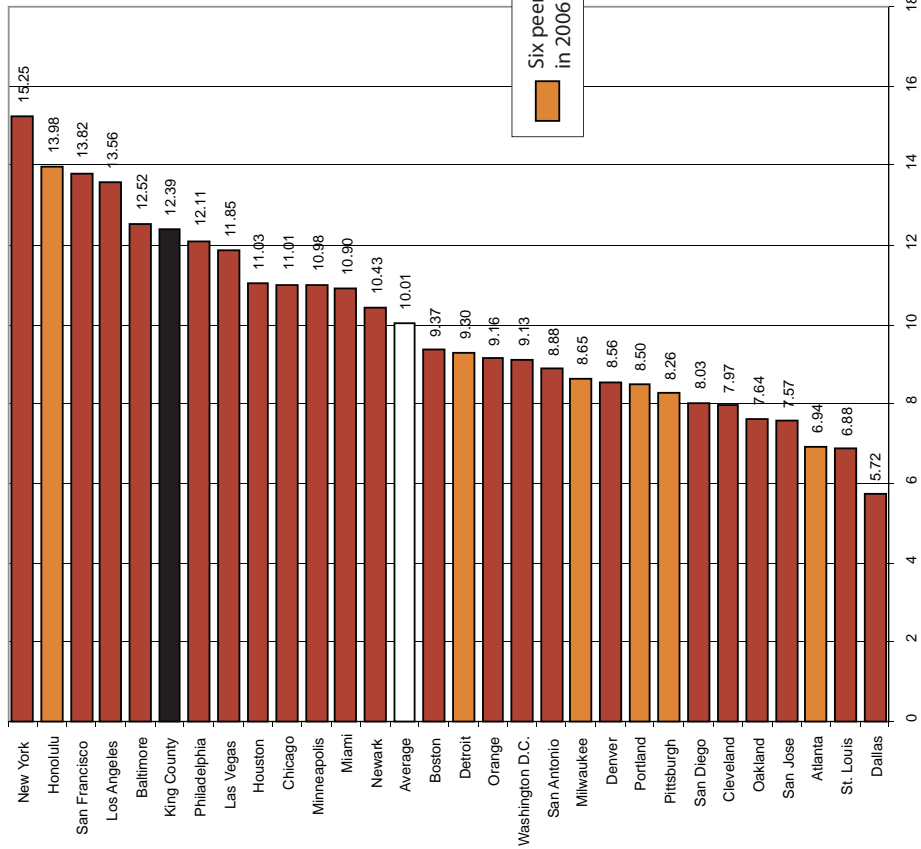
Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Passenger Mile Per Platform Mile, 2001 to 2008



Note: 2001 King County Metro Transit data adjusted to remove Sound Transit service.

Passenger Mile Per Platform Mile, 2008

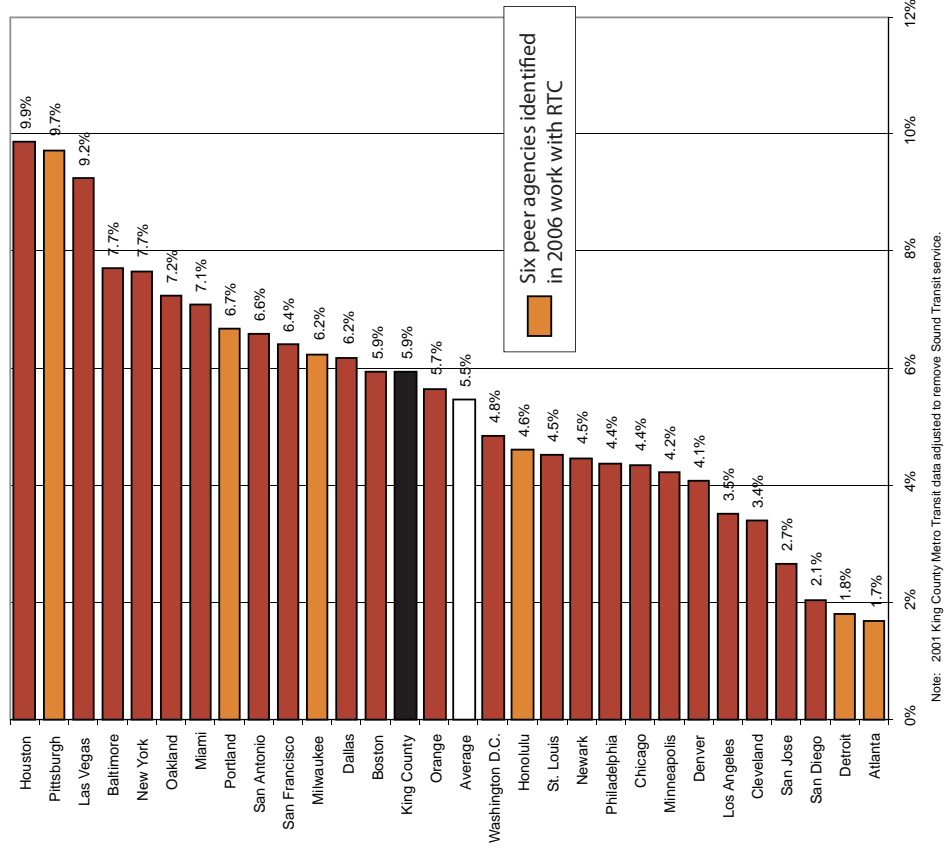


Six peer agencies identified in 2006 work with RTC

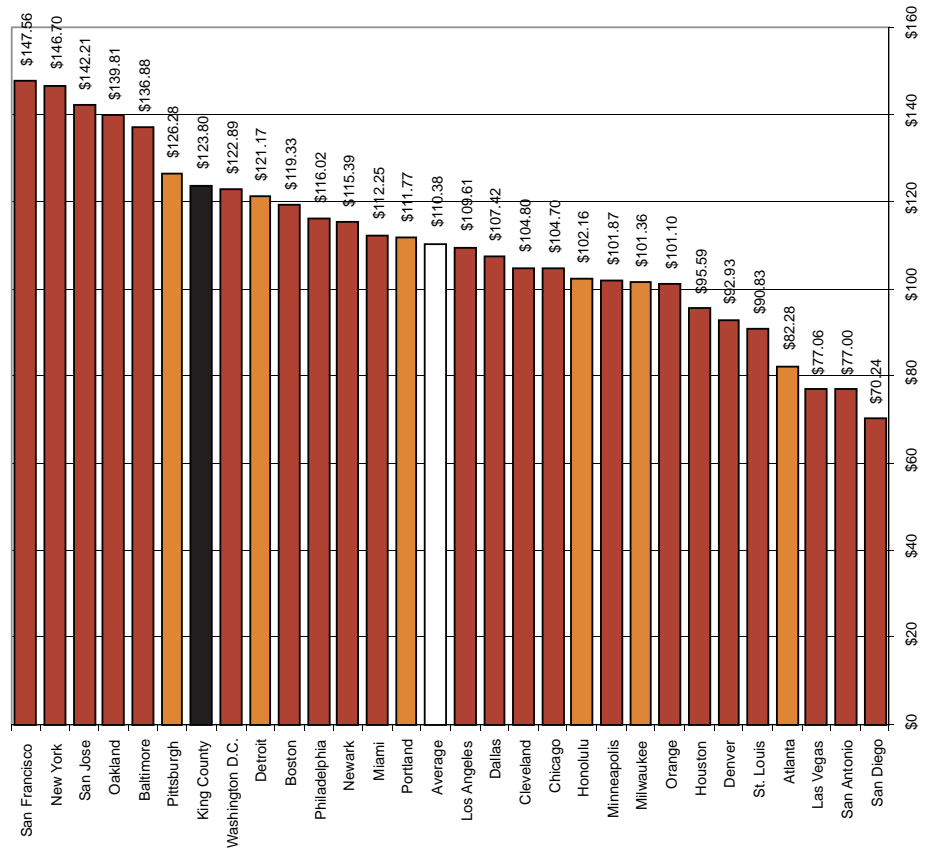
Transit Productivity

Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Operating Cost Per Platform Hour, 2001 to 2008



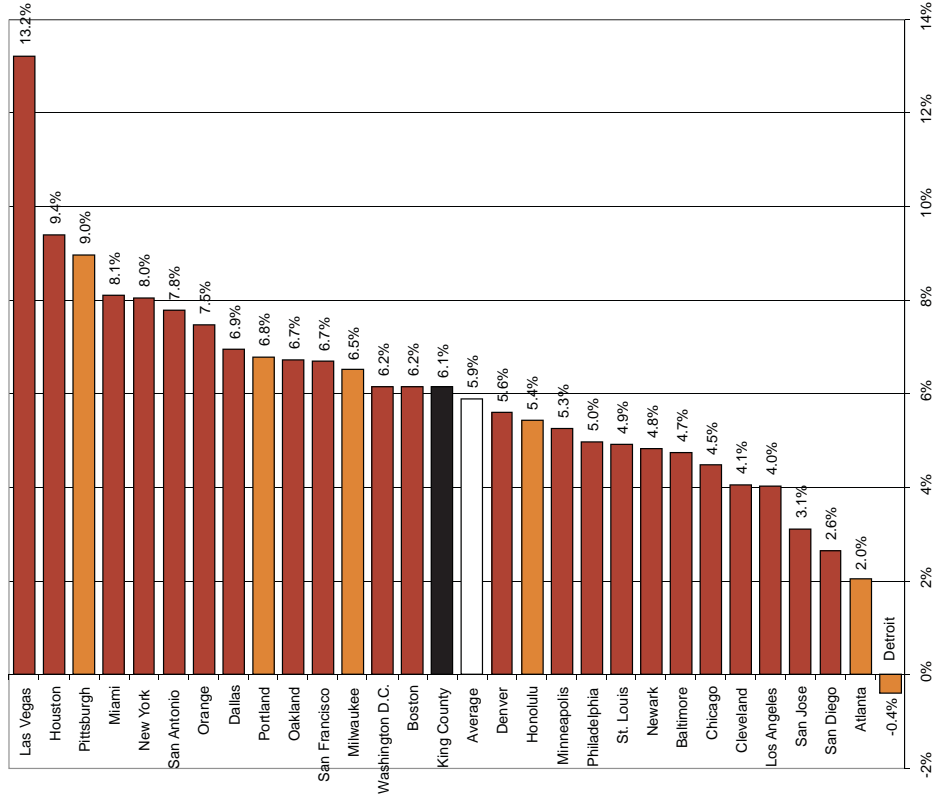
Operating Cost Per Platform Hour, 2008



Transit Productivity

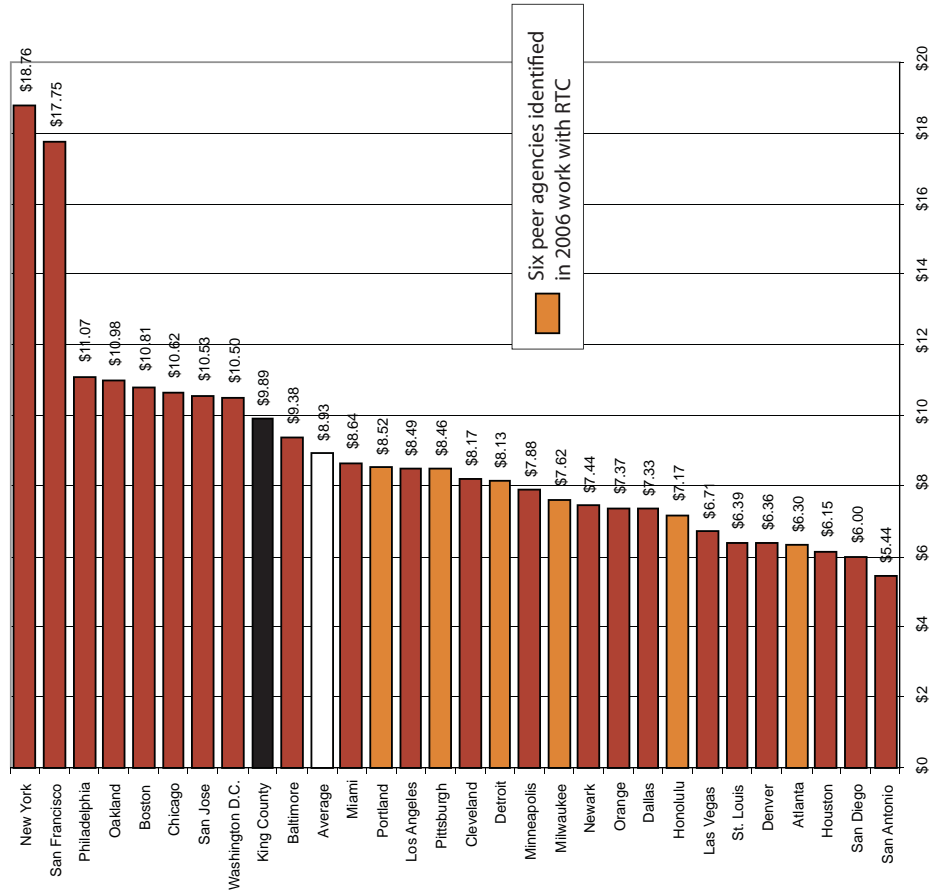
Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Operating Cost Per Platform Mile, 2001 to 2008



Note: 2001 King County Metro Transit data adjusted to remove Sound Transit service.

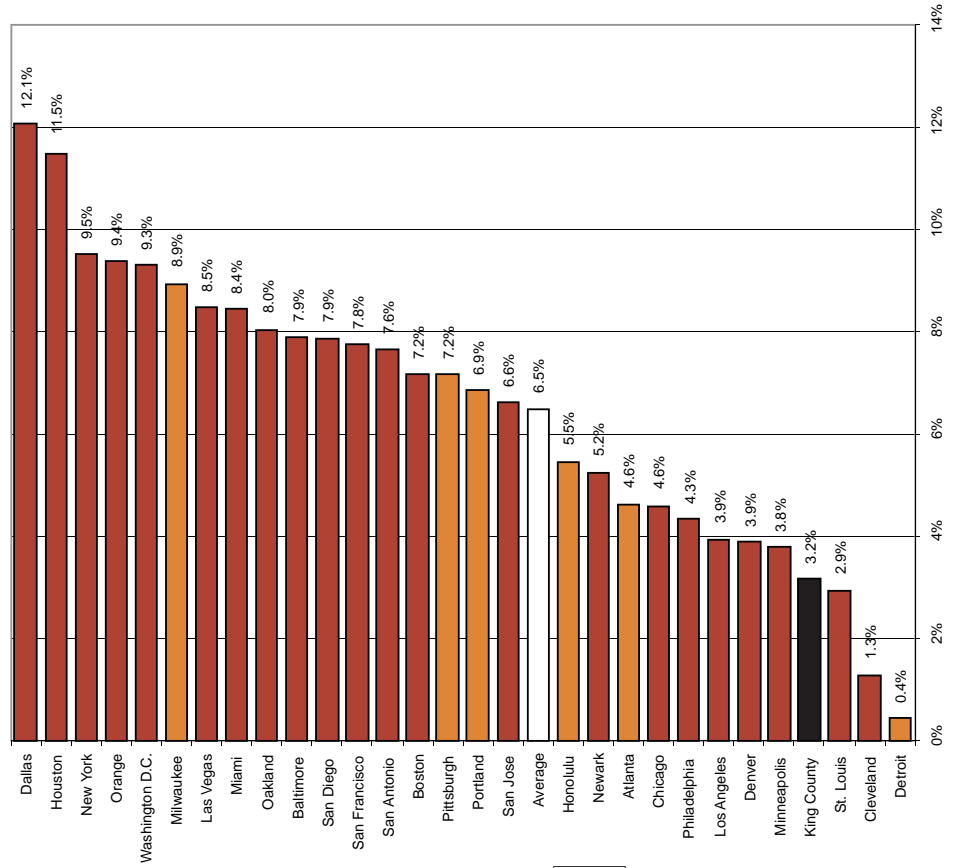
Operating Cost Per Platform Mile, 2008



Transit Productivity

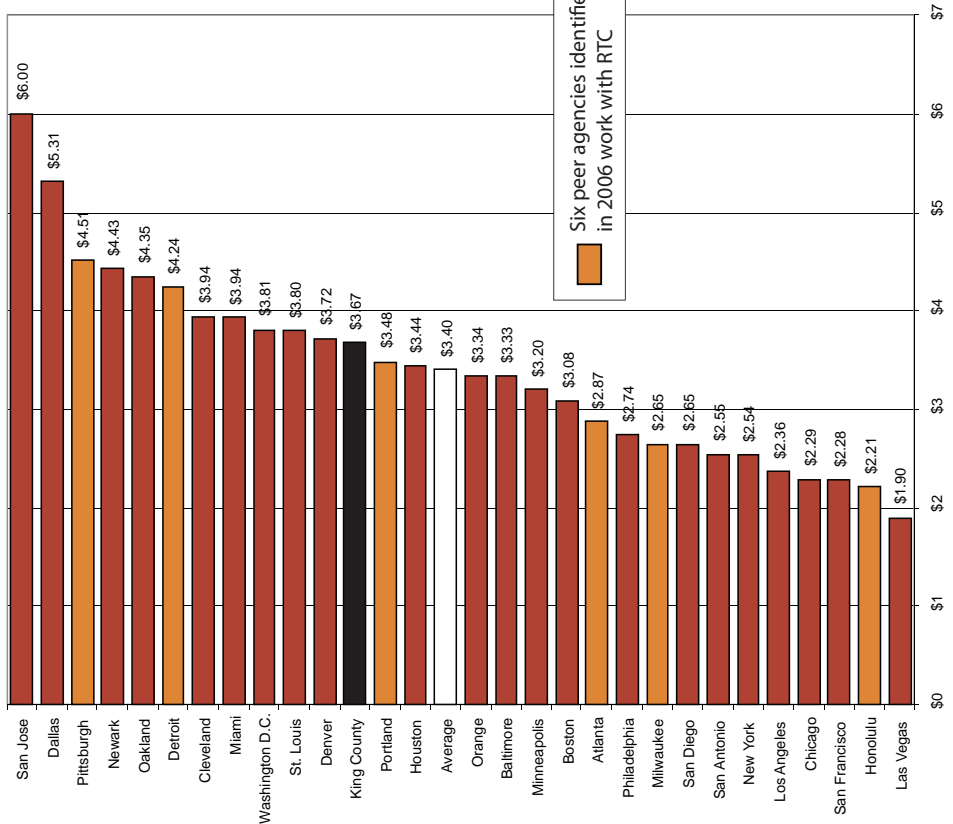
Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Operating Cost Per Boarding, 2001 to 2008



Note: 2001 King County Metro Transit data adjusted to remove Sound Transit service.

Operating Cost Per Boarding, 2008

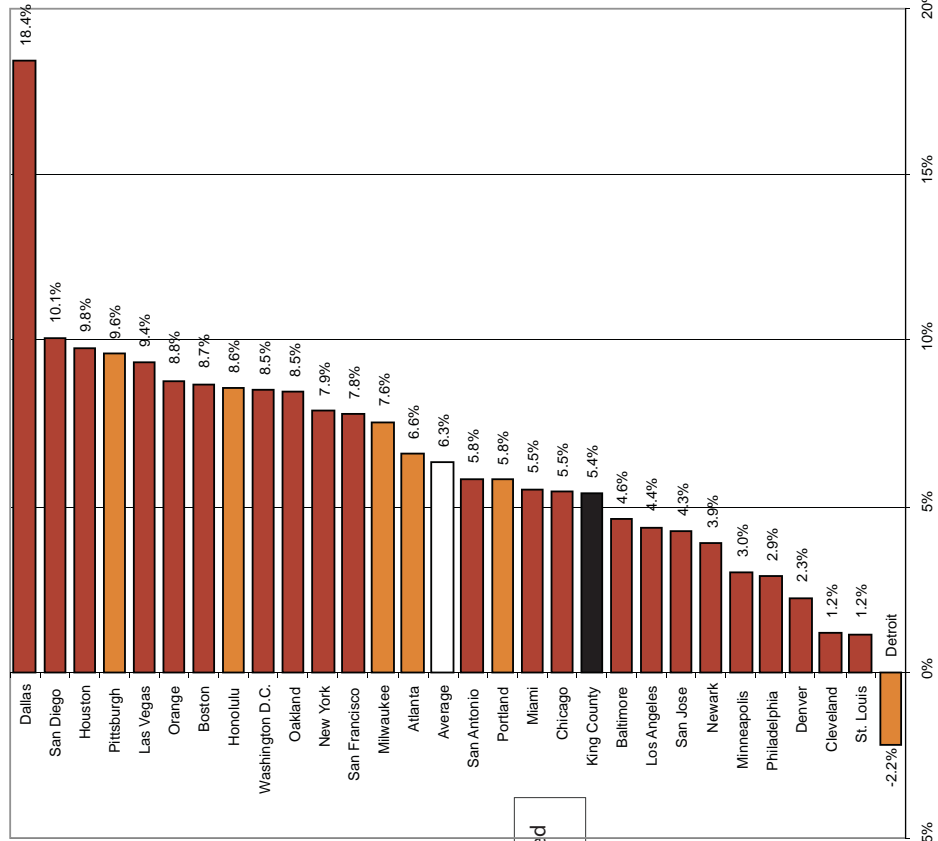


Six peer agencies identified in 2006 work with RTC

Transit Productivity

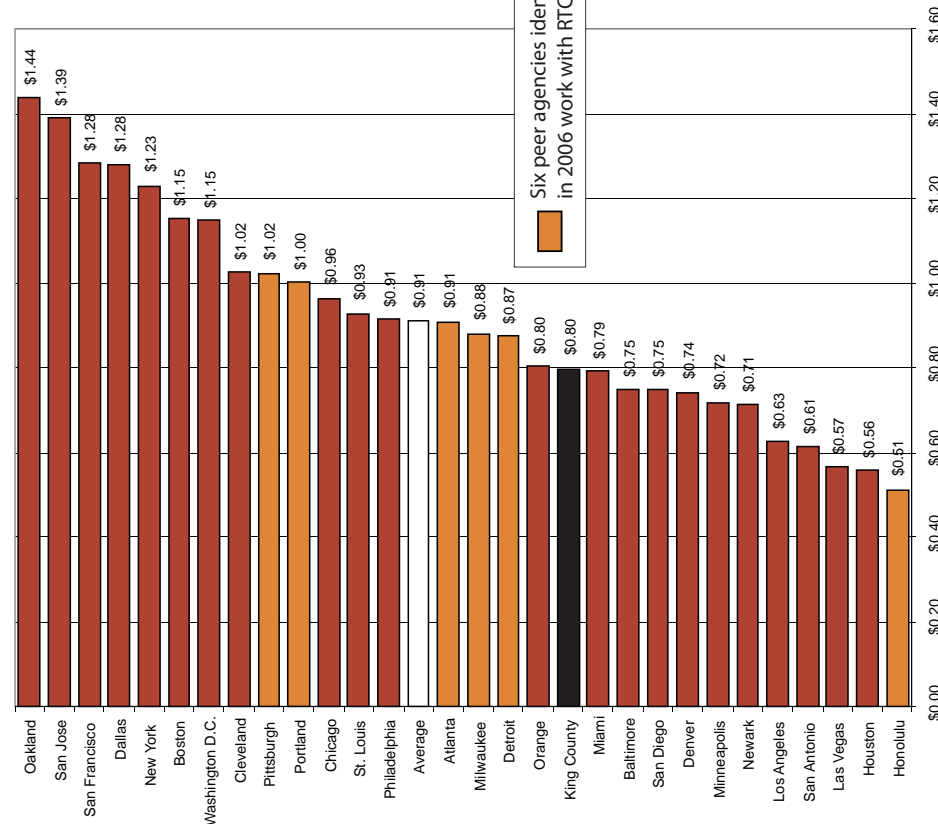
Motorbus and Trolley Bus, 2001 and 2008 NTD

Average Annual Percent Change in Operating Cost Per Passenger Mile, 2001 to 2008



Note: 2001 King County Metro Transit data adjusted to remove Sound Transit service.

Operating Cost Per Passenger Mile, 2008



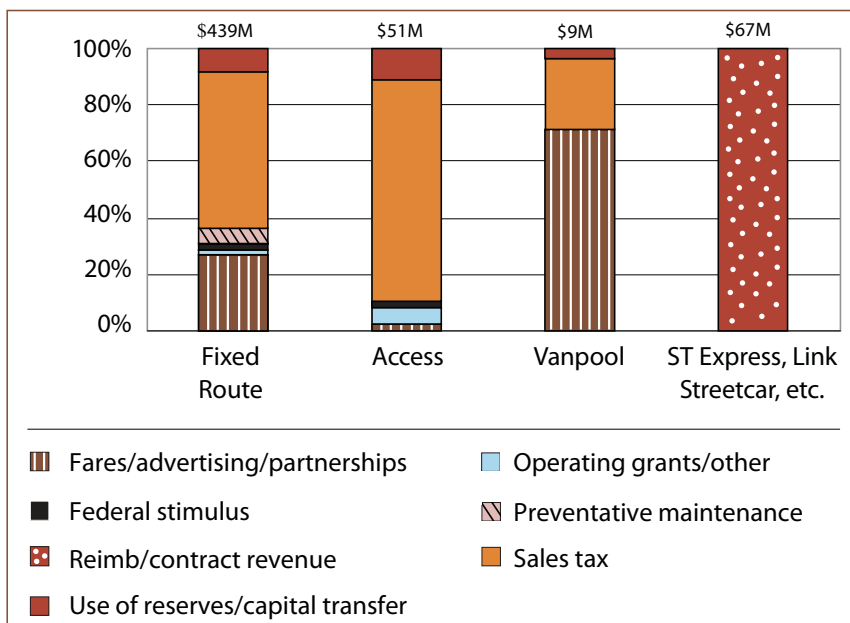
Six peer agencies identified in 2006 work with RTC

APPENDIX 5: Draft Sources and Uses of Funds

Metro Service Product Sources and Uses Summary Sheet

Transit Program Funding

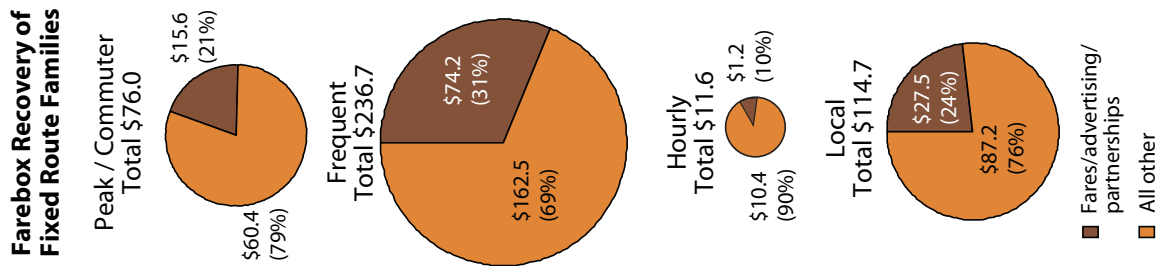
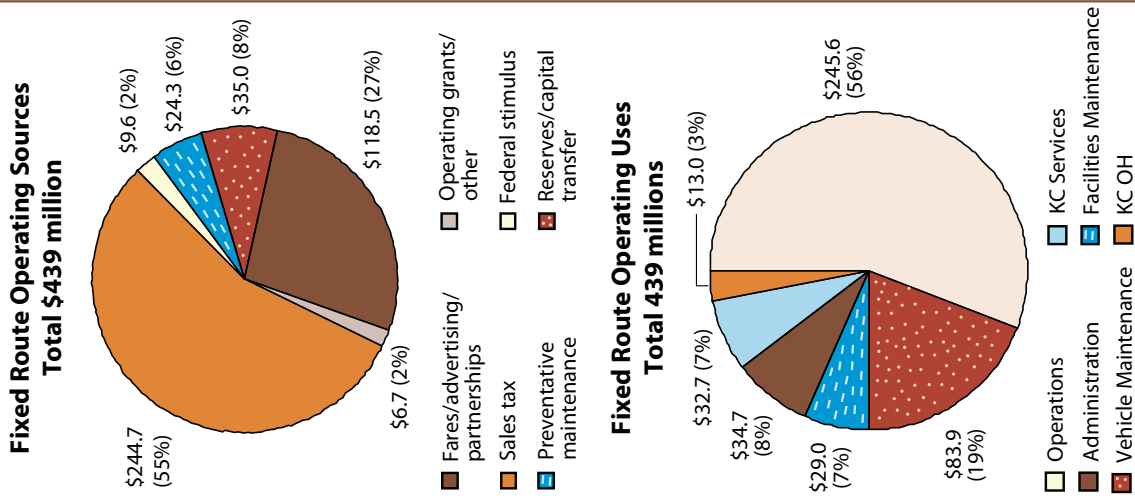
(Preliminary 2009 actuals)



Metro Service Products and Service Outputs				
Service Outputs	FIXED ROUTE	ACCESS	VANPOOL	Metro Operated ST Regional Express
Hours (% of Total)	3,516,000 (71%)	743,000 (15%)	347,215 (7%)	340,000 (7%)
Passenger Miles (% of Total)	499,774,000 (77%)	11,780,000 (2%)	60,215,000 (9%)	75,651,000 (12%)
Total Operating Cost*	\$439	\$51	\$9	\$67
Total Fare Revenue †*	\$118.5	\$1.2	\$6.4	N/A
Metro Fixed Route Families and Performance Metrics				
Performance Metrics	FIXED ROUTE	ACCESS	VANPOOL	Metro Operated ST Regional Express
Boardings* (% of Total)	111.7 (90%)	1.1 (1%)	3.7 (3%)	8.1 (6%)
Boardings / Plat Hr	32	2	9	21
Pass Mi / Plat Hr	142.1	15.9	173.4	217.4
Cost – Fares / Rider	\$2.87	\$43.48	\$0.82	N/A

* Reported in millions
† Fare revenue includes advertising and partnerships

Fixed Route Sources and Uses Summary Sheet



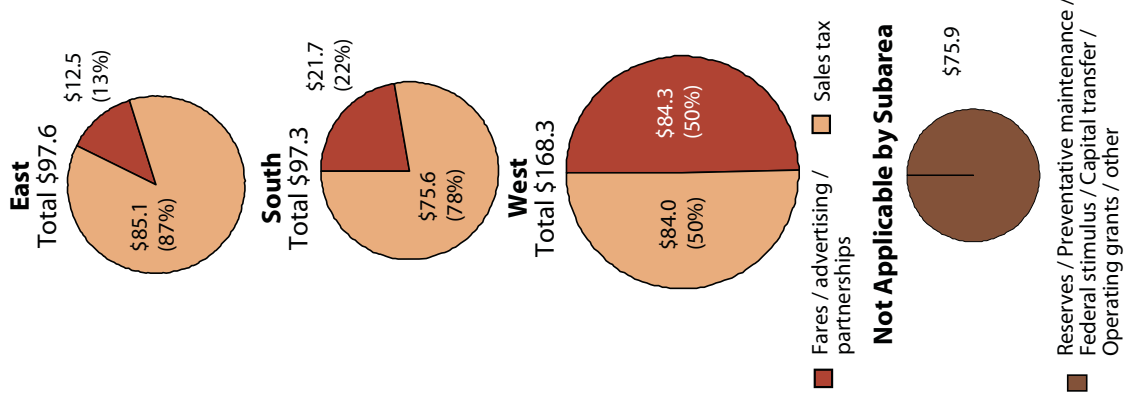
Metro Fixed Route Families with Service Outputs and Performance Metrics

Service Family	Hours (% of Total)		Passenger Mi (% of Total)		Total Operating Cost*	Total Fare Revenue**
	Boardings (% of Total)	Boardings/Plat Hr	Passenger Mi Plat Hr	Boardings/Plat Hr		
Peak / Commuter	543,000 (15%)	107,162,000 (21%)	197.1	\$76,000,000 (17%)	\$15,600,000 (13%)	
	11,900,000 (11%)	197.1	22	\$5.11		
Frequent	1,893,000 (54%)	288,749,000 (58%)		\$236,700,000 (54%)	\$74,200,000 (63%)	
	72,300,000 (65%)	152.6	38	\$2.25		
Hourly	100,000 (3%)	6,035,000 (1%)		\$11,600,000 (3%)	\$1,200,000 (1%)	
	1,200,000 (1%)	60.2	12	\$8.50		
Local	980,000 (28%)	97,828,000 (20%)		\$114,700,000 (26%)	\$27,500,000 (23%)	
	26,300,000 (24%)	99.9	27	\$3.37		
Fixed Route Total	3,516,000 (100%)	499,774,000 (100%)		\$439,000,000 (100%)	\$118,500,000 (100%)	
	111,700,000 (100%)	142.1	32	\$2.87		

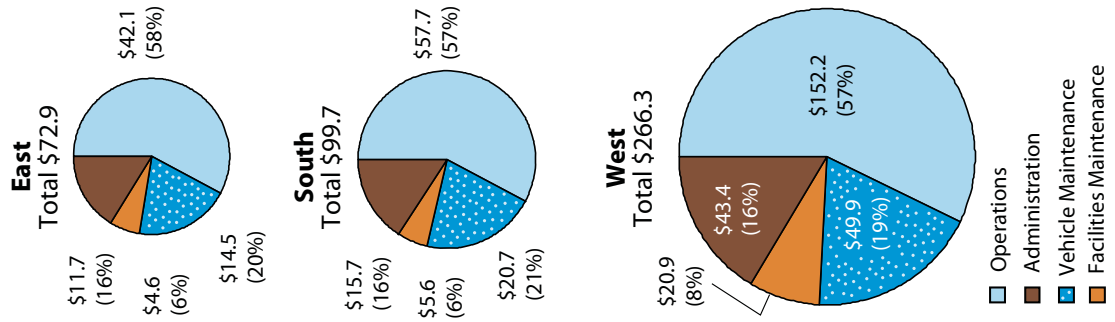
* Reported in millions
† Fare revenue includes advertising and partnerships

Fixed Route Sources and Uses Summary Sheet

Fixed Route Operating Sources by Subarea



Fixed Route Operating Costs by Subarea



Metro Service Outputs and Performance Metrics by Subarea						
Service Family	Hours (% of Total)	Passenger Mi (% of Total)	Total Operating Cost*	Total Fare Revenue ^{1*}	Cost-Fares/Riders	
	Boardings (% of Total)	Passenger Mi Plat Hr	Boardings/Plat Hr	Cost-Fares/Riders		
East	601,000 (17%)	68,969,000 (14%)	\$74,100,000	\$12,500,000		
	10,835,000 (10%)	114.7	18	\$5.68		
South	767,000 (22%)	134,439,000 (27%)	\$97,300,000	\$21,700,000		
	20,106,000 (18%)	175.4	26	\$2.27		
West	2,148,000 (61%)	296,366,000 (59%)	\$267,300,000	\$84,300,000		
	80,759,000 (72%)	137.9	38	\$3.76		
Fixed Route Total	3,516,000 (100%)	499,774,000 (100%)	\$439,000,000	\$118,500,000		
	111,700,000 (100%)	142.1	32	\$2.87		

* Reported in millions
 † Fare revenue includes advertising and partnerships

APPENDIX 6: Draft Performance Measures

King County Metro Transit Performance Measurement

A useful and transparent performance measurement system will help Metro gauge how effective it is at meeting its goals and objectives. Metro will consider route-level, system-level, and peer comparison measures in order to gain a more complete picture of how well the system performs, and to identify and evaluate adjustments to the system over time.

Performance Measurement System

Standards and Guidelines. Metro will develop a Standards and Guidelines document that will specify the criteria for designing the system. These criteria will include appropriate locations of the different types of routes, as well as various operating characteristics such as appropriate service levels, hours of operation, and stop distances. The guidelines will specify how service will be designed, measured and the circumstances that call for service modifications.

Once integrated, Metro will use performance measures to evaluate the performance of the system. Metro will be able to measure its achievement of established goals and objectives, provide a basis for comparison and change to individual routes in the system, and provide a basis for comparison of Metro's system to identified peer systems.

Route Level Performance Measures. Route level performance measures will indicate the efficiency and effectiveness of individual routes within the system. Metro will evaluate individual routes, compare the routes to one another, and then decide whether or not further action is needed. If improvement is needed, Metro will seek to take further action to adjust the route, as resources permit.

This cycle is an iterative process with targets that change with each evaluation, since the performance of an individual route is compared to the performance of a group of similar routes.

System Level Performance Measures. System level performance measures can indicate how well Metro is meeting its goals and objectives. If improvements are needed on the system level, Metro will seek to take further or different actions or to change the standards and guidelines, as resources permit.

Peer Performance Comparisons. Metro can use performance measures to gain some insight into thresholds for performance and acceptable levels of performance based on how well other transit agencies are doing. The measures used to compare against peer agencies should be based on data available through the National Transit Database (NTD) and should be explained or normalized to account for varying operating or policy conditions at peer agencies.

This cycle of performance measurement at the system level and in comparison to peers is also an iterative process, which impacts and is impacted by the overall goals and objectives established for Metro's system.

Metro System Performance Measures

These measures are designed for system-level use, but some may also be used to examine route performance.

✓ Identifies Relevant Key Factor(s)

Productivity/Efficiency
Social Sustainability
Econ. Development
Land Use
Geographic Balance
Environmental Sustainability

	Current (2009)	Target* (TBD)	Productivity/Efficiency	Social Sustainability	Econ. Development	Land Use	Geographic Balance	Environmental Sustainability	Comments
Annual Boardings <i>Measure of the scale of the system and its contribution to people's travel needs.</i>	111.7ml		✓					✓	Reported annually: Actual hours delivered within a year, reported by service type. Source: APC Data
Boardings per Platform Hour <i>Measure of the productivity of transit services.</i>	31		✓						Reported Annually: Can be reported by service type. Source: APC Data
Passenger Miles per Platform Hour <i>Measure of the productivity of transit services. It speaks to the strength of Metro's services especially in productive service delivery on long-distance commute-heavy routes.</i>	142.1		✓					✓	Reported Annually: Can be reported by service type. Source: APC Data
Operating Cost minus Fare Revenue per Boarding <i>Measure of the cost-effectiveness of different services.</i>	\$2.94		✓						Reported Annually: Can be reported by service type. Source: APC Data
Operating revenue/operating cost <i>Measure of operating cost supported by fares and revenue directly associated with operations.</i>	27%		✓						Report Annually: Can be reported by service type. Source: APC Data
Percentage of HOV use to CTR employment sites <i>Surrogate measure of Metro's contribution to economic development and congestion relief.</i>	44.9%			✓					Report biennially: Source: CTR employer surveys
Percentage of households that use transit (measures both regular and infrequent riders) <i>Measure of Metro's market penetration and mobility.</i>	37.0%				✓				Report biennially: Source: Metro Rider/non-Rider surveys
Percent of population in minority/low income census blocks within 1/4 mile of a bus stop served by Frequent Arterial or Local services compared to percentage of population in non minority/low income census blocks served by Frequent Arterial or Local services <i>Measure proportionate delivery of service (per Federal Civil Rights Act and USDOT rules).</i>	80.6% / 51.6% = 1.6						✓		Report Annually. (Minority and/or low income census tracts are defined as a higher percentage than the King County average.) Source: Census

Metro System Performance Measures

These measures are designed for system-level use, but some may also be used to examine route performance.

Identifies Relevant Key Factor(s)

Productivity/Efficiency
Social Sustainability
Econ. Development
Land Use
Geographic Balance
Environmental Sustainability

	Current (2009)	Target* (TBD)	Productivity/Efficiency	Social Sustainability	Econ. Development	Land Use	Geographic Balance	Environmental Sustainability	Comments
Percentage of population within census blocks with a density of 15 households per acre or greater within 1/4 of mile of a bus stop of Frequent Arterial service. <i>Measure of geographic distribution of service within moderate and high population density.</i>	83.0%					✓	✓		Report Annually. Source: Census
Percentage of population within census blocks with a density of 7 households per acre or greater within 1/4 of mile of a bus stop of Local service or better. <i>Measure of geographic distribution of service within moderate and high population density.</i>	91.4%					✓	✓		Report Annually. Source: Census
Percentage of Population within census blocks with a density of 3 households per acre or less within 1/4 of mile of a bus stop of Hourly service or better. <i>Measure of geographic distribution of service within areas of low population density.</i>	45.9%					✓			Report Annually. Source: Census
Transit vehicle CO2 per passenger mile divided by the average King County automobile CO2 use per mile <i>Measure of the contribution of Metro transit's investment and use to the reduction of overall transportation inefficiency and fossil fuel use/greenhouse gas emissions.</i>								✓	Reported Annually. Calculation uses average Metro bus CO2 emissions and the average automobile CO2 emissions per mile.

*Actual performance measured against projected targets must account for external factors especially gas prices and employment levels

Key Factor Definitions

Land Use – Transit serves existing land uses and responds to the planned residential and employment densities, and commercial activities that support the adopted Regional Land Use Plan.

Economic Development – Transit's contribution to a thriving regional economy.

Productivity and Efficiency – Effectiveness of meeting the travel needs of the population and that service is delivered cost effectively.

Geographic Equity – Distribution and delivery of services, including fixed route bus service as well as other transit and ridesharing services within King County's urbanized area that is appropriate to the land use and the market.

Social Equity and Environmental Justice – The proportionate distribution of transit service among people of color and those of low income within areas that have more than the county's proportion of these populations.

Financial Sustainability – The establishment of revenues and financial policies that account for economic cycles and that keep revenues and cost in relative balance.

Environmental Sustainability – Transit carries an adequate number of passengers so that the greenhouse gas emissions generated is less than would be generated if the same number traveled by automobile.

APPENDIX 7: Status Report on Implementation of Audit Recommendations

2009 Performance Audit of Transit: Status and Implementation Update

Background. The past three years have been characterized by difficult economic conditions, both on the local and national scale. As a result, financial issues, which in large part have been caused by a steep decline in sales tax receipts, have been at the forefront of concern for King County Metro Transit (Metro). In the fall of 2008, the King County Council called for a performance audit of Metro. Councilmembers were interested in finding efficiencies and savings within Metro that could help address difficulties in balancing Metro's budget. The general conclusion of the audit is that some ways in which Metro pursues its mission have contributed to higher costs – a situation that has been exacerbated by the difficult economic environment. Furthermore, the audit found that Metro could achieve cost savings and generate revenues through enhanced planning and more systematic data analysis. The audit identified \$37 million in opportunities for annual savings and up to \$54 million in options for increased annual revenue largely through various types of fare increases. In addition, the audit identified \$105 million in one-time savings by reducing the funds held for revenue fleet replacement. Of the 34 audit recommendations, Metro concurred with 31, partially concurred with one and did not concur with two.

Metro Actions. The 2009 Performance Audit of Transit was published on September 15, 2009. In response to the audit, Metro submitted an action plan to address all of the recommendations by 2012, with the mutual understanding that some actions would result in revised business processes that would require additional monitoring and evaluation. From the start of the audit, Metro actively collaborated with the auditors and consultants to implement changes and improvements, and since the audit was published, routine status reports have been submitted to the auditor. Even for the recommendations with which Metro did not concur, Metro has provided action plans and deliverables. Consistent with our commitments, substantial progress has already been made.

- **Improved Scheduling Techniques.** Metro has aggressively worked with consultants to train staff and upgrade its use of scheduling software. Through making these changes, Metro has identified 125,000 hours of scheduling efficiencies that will be implemented in 2010-2011. These actions are expected to yield \$12.5 million in annual savings, reducing the need for other reductions in bus service.
- **Changes to Operator Staffing Practices.** Metro is currently conducting analyses and evaluating the pros and cons of adjusting Operator staffing practices. One major staffing management effort has been to more closely track the way in which Metro has historically staffed daily operator assignments. Metro will continue to make adjustments to optimize staffing levels and operator efficiency, as possible within the parameters of the Amalgamated Transit Union (ATU) collective bargaining agreement.
- **Efficiencies in the Paratransit Program.** Paratransit (Access) has developed a productivity strategic plan and is evaluating how to implement the 18 identified strategies to improve productivity over the next three years. Additionally, Paratransit was able to expand its Community Access Transportation program by 25% resulting in over \$2.7 million in savings.

- **Improvements in Vehicle Maintenance.** Metro has established a pilot program at North base for extending the preventative maintenance interval and will evaluate the impacts on overhead costs. Metro estimates that it will take one year of data collection to evaluate the relationship between cost savings and the impact on fleet state of good repair. Additionally, Metro is working to expand, implement and monitor system-wide productivity standards for vehicle maintenance.
- **Emphasis on Planning and Policies.** Metro is currently working to update its Strategic and Comprehensive Plans, with input from the Regional Transit Task Force. As part of these updates, Metro will incorporate many of the suggested changes to planning and policies that the audit recommends, such as a Guidelines Document, a Facility Master Plan, new financial policies and fare policy recommendations.
- **Evaluation of Current Policies and Plans.** Metro is currently conducting several studies to evaluate current plans and policies. The Trolley Bus System Evaluation and evaluations of the Ride Free Area are currently underway, with results expected in the Spring of 2011. Metro is also updating its financial and economic replacement models to better guide fiscal planning in the next budget cycle. Metro has already planned to use \$100 million in fleet reserves to sustain service through 2013, while re-examining the fleet replacement fund financial policy.

The attached table provides a brief status report for all Metro responses to the audit recommendations as of the 3rd Quarter, 2010. As work is completed on the various audit responses, promising elements will be incorporated into Metro's 2012-2013 proposed budget.

Audit Recommendations and Transit Response as of 3rd Quarter, 2010

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
A1: Create an updated version of the financial model that has complete documentation and explicitly identified assumptions.	Conducted review of current financial model; identified additional requirements for the new financial model; hired consultant to help develop the new model.	For use with 2012-2013 budget process	n/a	No
A2: Propose updated financial policies, particularly those related to sales tax distribution and cost growth.	Reviewed financial policies of other transit organizations and non-transit policies internal to King County; developing new policies with consideration of Regional Transit Task Force (RTTF) recommendations.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
A3: Revise assumptions to improve the accuracy of projections for capital expenditures and capital grant revenue.	Analyzing capital grant revenue assumptions and variances between planned to actual capital grant revenues; will analyze capital expenditures and revise the assumptions used in the model.	For use with 2012-2013 budget process	Unspecified	TBD
A4: Develop a plan for reducing the Revenue Fleet Replacement Fund balance.	Programmed \$100 million of the Revenue Fleet Replacement Fund to maintain transit service from 2009-2013.	Will be part of the 2012-2013 budget process	\$105 million in one time savings	\$100 million
A5: Address technical issues with the economic analysis model.	Corrected technical issues with this model; auditor's office confirmed that the issues were addressed.	Completed 1st Q2010	n/a	No
A6: Create economic replacement analysis models to inform vehicle replacement decisions.	Collaborating with Portland State University to generate new generation of fleet replacement models. These models will use Metro data in a case study that will inform vehicle replacement decisions.	For use with 2012-2013 budget process	Unspecified	TBD

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
A7: Complete a review of the Fleet Administration's replacement criteria for non-revenue vehicles. Compare to Metro's non-revenue vehicle fleet replacement criteria.	Reviewed operations and maintenance data for non-revenue vehicles; found that replacement goals for pickup trucks should be seven years instead of eight; will use the new replacement goal going forward.	Completed 3Q 2010	Unspecified	TBD
A8: Complete a comprehensive Asset Management Guidebook that includes all Asset Management efforts currently underway at Metro. Metro did not concur with this finding.	Currently comply with both state and federal requirements for asset maintenance; creation of a stand alone guidebook has limited value to Metro and is likely to be redundant with state and federal reporting.	Completed 2Q 2010	n/a	No
A9: Implement a facilities condition index to track and monitor facility condition relative to established systemwide targets. Metro did not concur with this finding.	Collaborating with the FTA on the State of Good Repairs project – through this project, transit agencies across the nation will develop a standardized rating system that is condition based in order to establish the criteria for rating and determining an acceptable level of asset condition. Metro does not see the need to implement a separate facilities condition index and systemwide targets.	Work on this project is dependent on the progress of the FTA	Unspecified	TBD
A10: Incorporate all elements of facility master planning in the update to the Comprehensive Plan.	Developing a Facility Master Plan, completed proposed outline, collaborating with various internal groups, developing an inventory of transit facilities.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
A11: Determine an appropriate fleet replacement for the trolley buses.	Conducting trolley bus system evaluation; completed scope, schedule and work plan; developing technical analysis.	Draft report expected in March 2011; final recommendation for use with 2012-2013 budget process	\$8.7 million annually	TBD

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
A12a: Develop and propose fare policy goals to be used as the basis for making fare policy decisions.	Presented on fare goals, trade-offs, structure implications, and adopted fare policies to the Regional Transit Committee; will determine fare policy goals in conjunction with plan updates.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
A12b: Define and monitor target farebox recovery ratio.	Developing new policies with consideration of RTTF recommendations; will consider how to redefine and monitor the farebox recovery ratio.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
A12c: Consider further utilizing fare policy changes to generate additional revenues. A12d: Set senior, disabled, youth discounted fares in line with other peer transit agencies.	Developing new policies with consideration of RTTF recommendations; will consider when and how to generate additional revenues from fares and when and how to change senior, disabled, youth fares.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	Up to \$51 million annually	TBD
A13: Update and fully document the formula used to assess the City of Seattle's payment for the Downtown Seattle Ride Free Area (RFA) to reflect current ridership and operating conditions.	Developed two preliminary reports to consider potential impacts of eliminating the RFA. Found that Metro could potentially gain \$2.1-2.2 million per year, but would face increased operational challenges. Additional study is needed to fully assess the impacts of eliminating the RFA.	Completed preliminary analysis 3Q 2010, final evaluation expected Spring, 2011	n/a	\$2.1-2.2 million annually. Note: this estimate requires further study to assess operational impacts.
B1: Develop a plan to implement Service Development's schedule efficiency tools.	Developed a plan for implementation of scheduling efficiency tools, described in B1a-j.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	No
B1a: Expand the set of efficiency indicators and goals and use as targets when developing schedules.	Developed a report to be produced triannually; report tracks scheduling efficiency efforts and related performance measures; determines progress toward meeting goals.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	\$12.5 million annually

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
B1b: Complete, formally adopt, and publish a standards/guidelines document.	Developing a service guidelines document consistent with the recommendations of the RTTF.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
B1c: Develop a process and procedures for periodic global optimization of the bus system schedule.	Incremental improvements have been made to the "deadhead matrix," that make finding cost-effective solutions more possible. Global solutions are likely to be explored in the production of 2011 schedules when there are fewer incremental changes to be found.	Implemented over the course of 2010; ongoing effort to track and monitor progress	\$0.4 million annually	All scheduling efficiency savings are shown in the savings for B1a
B1d: Employ systematic percentile-based cycle time analysis. Metro did not concur with this finding.	Cycle time analysis has been employed in development of schedules; over 25,000 hours of savings have been achieved in the 2010 service changes; there has been a steady decrease in lay-over to in service ratios.	Implemented over the course of 2010; ongoing effort to track and monitor progress	\$12-19 million annually	All scheduling efficiency savings are shown in the savings for B1a
B1e: Utilize HASTUS' MinBus module to implement scheduling procedures that assign vehicles to trips more efficiently.	Each scheduler now uses HASTUS' MinBus module when creating schedules.	Implemented over the course of 2010; ongoing effort to track and monitor progress	\$0.7 million annually	All scheduling efficiency savings are shown in the savings for B1a
B1f: Develop the most efficient run cut using HASTUS' CrewOpt module.	Each scheduler now uses HASTUS' CrewOpt module when creating schedules.	Implemented over the course of 2010; ongoing effort to track and monitor progress	\$3 million annually	All scheduling efficiency savings are shown in the savings for B1a
B1g: Ensure full calibration of HASTUS to support schedule efficiency, reduce time taken to produce schedules.	HASTUS has been fully calibrated and focus has shifted to how to improve rule setting in the modules.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	All scheduling efficiency savings are shown in the savings for B1a

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
B1h: Develop a systematic process for ensuring accurate costs are programmed into HASTUS.	Costs in HASTUS were immediately updated once the audit recommendations were released and will be updated on an annual basis.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	All scheduling efficiency savings are shown in the savings for B1a
B1i: Maintain accurate data in HASTUS data fields.	Accurate data has been inputted into HASTUS and focus has shifted to how to improve rule setting in the modules.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	All scheduling efficiency savings are shown in the savings for B1a
B1j: Ensure that staff have the knowledge to fully utilize the HASTUS system.	Trainings have taken place to improve the ability of schedulers to use HASTUS and develop efficient schedules.	Implemented over the course of 2010; ongoing effort to track and monitor progress	n/a	All scheduling efficiency savings are shown in the savings for B1a
C1: Capture additional data and modify current data sources to aid in the analysis of the relationship of Operations staffing levels and Operations staffing resource utilization to performance.	Determined appropriate data and measures to track to help achieve optimal staffing levels and resource utilization; working to track data and determine the impact on performance and costs.	Evaluation of efforts expected at the end of 2010	Unspecified	TBD
C2: Effectively manage the costs of planned and unplanned operator leave.	Progress on this recommendation is subject to the collective bargaining agreement with the Amalgamated Transit Union, currently under negotiations.	Evaluation of efforts expected at the end of 2010	Unspecified	TBD
C3: Use overtime and part-time staff more extensively in lieu of full-time staff.	Implemented changes to the extra board and to utilization of more overtime; working to track data and determine the impact on performance and costs.	Evaluation of efforts expected at the end of 2010	Unspecified	TBD

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
C4: Consider using lower cost police staffing options when these options are consistent with security objectives.	Evaluated different staffing options; created a matrix of potential staffing options that includes potential options, cost ranges, benefits and drawbacks. At this time, security objectives preclude any changes in staffing.	Completed 2Q 2010	Unspecified	TBD
C5: Strengthen Metro Transit Police (MTP) staffing management practices by employing a more statistically sound approach to planning staffing needs and regularly updating employee absences to reflect actual absences and backfill needs of MTP.	Implemented process improvements including monthly rosters and information about people on non-deployment leave, and have determined a more accurate relief factor for the MTP 4/10 patrol schedule.	Completed 1Q 2010	Unspecified	TBD
C6: Work with employees to schedule comp time absences in advance, avoiding the need for backfill whenever possible.	Conducted training with MTP employees to encourage better scheduling of comp time absences.	Completed 3Q 2010	Unspecified	TBD
C7: Develop a more precise approach to calculating and charging for Sound Transit's (ST) portion of tunnel-related police costs.	Developed a new model for charging ST in connection with the implementation of Link light rail service; ST now pays 40% of the tunnel-related policing costs, up from 19% in 2009 and 9% in 2008.	Completed 1st Q2010	Unspecified	Changes were part of planned Link integration
C8: Develop a long term vision and plan for MTP that can be integrated with Metro's Strategic Plan.	Working to integrate MTP vision with that of Transit; completed review of existing goals and objectives, will incorporate into planning efforts.	To be completed in conjunction with Strategic and Comprehensive Plan update, Feb 2011	n/a	No
D1: Adopt a strategic plan and approach to address how Paratransit productivity goals are to be met.	Developed a strategic plan to meet productivity goals; identified 18 ways to meet productivity goal of 1.83 boardings per hour by 2012.	Completed 2Q 2010	\$2.8 million annually	TBD

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
D2: Continue Access cost containment efforts and monitor their effectiveness while expanding the Community Access Transportation (CAT) program.	Expanded CAT program by 25% in 2009 due to unanticipated WSDOT budget reduction. Projected to save Metro \$2.7 million.	Completed 2Q 2010	\$2 million annually	Over \$2.7 million annually
D3: Determine the potential savings and impacts on customer service if Metro adjusts paratransit service and fares to levels allowable by ADA.	Considering the feasibility of adjusting Paratransit service and fares to levels allowable by ADA; draft report nearing completion.	Expected in Fall 2010	Up to \$3.8 million	TBD
D4: Develop a thorough Paratransit staffing model that incorporates workload factors and processes, efficiency benchmarks, impacts of workload changes on staffing needs, and effects of staffing changes on Access performance.	Hired a consultant to conduct analysis and develop report for the staffing model; report is currently being reviewed and finalized.	Expected in Fall 2010	n/a	No
D5: Monitor and enforce contract incentives and penalties and evaluate their usefulness as a tool for improving productivity.	Established incentives and disincentives for contractors related to productivity and reliability; will be tracked and impact will be reported.	Implemented 1Q 2010; results expected 1Q 2011	Unspecified	TBD
E1: Initiate a pilot program to extend the preventative maintenance interval on a control fleet.	Established pilot program at North base for extending preventative maintenance and have established a mechanism by which data from this pilot program will be compared to baseline data; will monitor and provide a recommendation.	Recommendation on impacts expected by 3Q 2011	Unspecified	TBD
E2: Track and monitor planned and unplanned vehicle maintenance work and formulate a strategic approach to manage unplanned work.	Established categories and definitions of planned/unplanned work; produced report on baseline data for planned work; will track work over time, looking for places where efficiencies can be made and will determine whether or not a performance indicator would be useful.	Recommendation on usefulness of performance indicator expected 1Q 2011	Unspecified	TBD

Audit Recommendations	Actions	Completed/ Expected	Audit Identified Savings	Actual Savings/ Funds Used
E3a: Regularly monitor adherence to vehicle maintenance productivity standards and work to ensure consistency in standards across bases.	Began process of calculating repair times for inspections and regularly scheduled preventative maintenance jobs; working to expand, implement and monitor productivity standards for vehicle maintenance and to ensure consistency across bases.	Expected 1Q 2011	n/a	No
E3b: Expand vehicle maintenance productivity standards beyond preventative maintenance inspections to other routine jobs.	Working to expand productivity standards beyond preventative maintenance inspections to other routine jobs.	Expected 1Q 2011	n/a	No
E3c: Establish a system-wide vehicle maintenance productivity program expanding on current productivity standards and performance measures.	Working to expand, implement and monitor system-wide productivity standards for vehicle maintenance.	Expected 1Q 2011	n/a	TBD
F1: Develop detailed implementation plan and timeline for integrating new on board and central communications systems data with existing data processing tools and data streams as the new system comes online.	Working to integrate new systems with existing systems; created a scope and an integration plan; will implement the plan though the end of 2011.	Expected 4Q 2011	n/a	No
F2: Continue to improve customer communications during emergencies, ensuring that the update to the strategic plan includes elements related to customer communication, completing an analysis of communications and developing a prioritized plan, and implementing improvements to the website, email notification system, and other technology to improve communications.	Implemented a number of strategies such as route specific email notification of information, improved adverse weather communications, and Metro website and web offerings improvements; working to integrate customer communications planning into Metro Strategic planning efforts; developing an analysis of communications options and a prioritized implementation plan.	Some have been completed, others expected by the end of 2010	n/a	No

APPENDIX 8: Conceptual Service Allocation Guidelines

To help the Regional Transit Task Force consider policy direction, Metro staff developed conceptual scenarios for transit service reduction and growth. To prepare the scenarios, they developed guidelines. Service guidelines establish the objective metrics for making service allocation decisions. The guidelines help to determine the appropriate level and type of service for different corridors and destinations, and for varying employment and population densities throughout the county.

Below are the draft conceptual guidelines Metro staff developed as examples for the Task Force. These examples were meant to be illustrative and will require further development by Metro staff.

Guidelines for Service Reduction

1. Provides a defined level of service for different population densities, defined by household density per acre.
2. Serves network connections – the route provides a unique connection between at least two other bus routes where transfers are expected.
3. Provides service to high utilization park-and-ride lots.
4. The service is part of a partnership agreement or a future RapidRide route.
5. Serves low-income populations and populations of color, defined as 50 percent of a census tract identified as the residence of low income persons or persons of color.

Guidelines for Service Growth

Responding to Demand

1. Load factor threshold for each service type.
2. Action taken when the threshold is exceeded, such as:
 - a. Address by bus size or trip time adjustment
 - b. Add trip to schedule
 - c. Work with local jurisdiction to improve transit speed and reliability
 - d. Consider reallocation from less productive service.

Supporting Regional Growth

1. Metropolitan cities with more than 15,000 jobs.
2. Corridors serving core city urban centers with points based on different employment levels.
3. Corridors serving high-density residential neighborhoods, with points based on different household densities per acre.
4. Service that provides a unique network connection between at least two other frequent corridors.
5. Corridors serving low-income populations and/or populations of color, with the most points awarded when a census block has more than 50 percent low-income persons or persons of color.
6. Corridors serving large ridership generators outside of urban centers (such as hospitals, educational institutions, shopping, etc.), with points awarded based on the number of ridership generators served.



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