Metro Service Guidelines Task Force

Report and Recommendations

I. Background

In 2010, the Regional Transit Task Force, a group of stakeholders appointed by the King County Executive, developed a groundbreaking set of policy recommendations for transit in the county. These recommendations helped to reshape how King County evaluates transit services and makes service decisions. The Regional Transit Task Force called for transparent, performance-based guidelines emphasizing productivity, social equity and geographic value.

A. Development and Use of Service Guidelines

Based on the Regional Transit Task Force's recommendations, King County Metro developed the Metro Service Guidelines. Metro also recognized the importance of service guidelines in Strategy 6.1.1 of its *Strategic Plan for Public Transportation 2011 – 2021*, which calls for it to "Manage the transit system through service guidelines and performance measures." Metro uses the guidelines "to make decisions about expanding, reducing and managing service, to evaluate service productivity, and to determine if service revisions are needed because of changes in rider demand or route performance. Guidelines are also intended to help Metro respond to changing financial conditions and to integrate its services with the regional transportation system" (Service Guidelines Task Force Notebook, p. 4.1).

Since adopting the Service Guidelines, Metro has analyzed performance, documented the analysis in annual *Service Guidelines Report*, updated the guidelines and adjusted service. An annual *Service Guidelines Report* shows how Metro uses the guidelines to plan, assess and change service. Each report presents the results of the analysis of annual data, allowing Metro to compare service each year to identify trends and areas needing improvement. The annual analysis determines: (1) where and how much service should be provided (the results of the target service level analysis, which identifies the productivity, social equity and geographic value[4] of corridors throughout the county); (2) how service is performing (through route performance analysis on each route in the system); and (3) where investments should be made to maintain the quality of service (to address overcrowding and reliability).

In short, the service guidelines help Metro "make decisions about adding, reducing and changing transit service to deliver productive, high-quality service where it is needed most" (*2014 Service Guidelines Report,* p. 4.31).

In 2014, the service guidelines were put through what could be considered a significant stress test—guiding a major reduction in service. The service reductions spurred some questions as to whether the guidelines strike the right balance to serve the county's growing population.

[4] See the Glossary in Appendix 5 for definitions of terms.

B. Creation of and Charge to the Task Force

In November 2014, the King County Council established the King County Metro Transit Service Guidelines Task Force, and charged it with "reviewing and making recommendations regarding:

"1. How transit service performance is measured as specified in the Metro Service Guidelines to reflect the varied purposes of different types of transit service

"2. Approaches to evaluating how the goal of geographic value is included in the Metro Service Guidelines, including minimum service standards

"3. Approaches to evaluating how the goal of social equity is included in the Metro Service Guidelines

"4. Financial policies for purchase of additional services within a municipality or among multiple municipalities

"5. Outline guidelines for alternative services implementation" (Ordinance 17941, adopting the 2015/2016 King County Biennial Budget).

County Executive Constantine and the County Council appointed the members of the Service Guidelines Task Force to include representatives of communities across the county and of diverse perspectives. (See list of members following the cover letter of this report.) John Howell of Cedar River Group facilitated the task force.

C. Task Force Meetings

The Service Guidelines Task Force met eight times between March 4 and October 7, 2015. Most of the members also attended a technical workshop in August (August 13, repeated on the 17th). The initial meetings included getting the task force's agreement on a set of ground rules for its work together (Appendix 1), and briefings by Metro staff to give members a grounding in Metro's service planning process, the Metro Service Guidelines, performance measurement, geographic value and social equity. The remaining meetings included robust discussion on these topics, which led to the development of a set of principles and recommendations. The flow of meeting topics was as follows:

Meeting #	Date	Topics Covered
1	March 4	Review of task force charge, agreement on ground rules, presentation on Metro overview and service guidelines
2	April 1	Presentations on performance measurement and geographic value
3	April 30	Presentation on social equity; discussion of transit system values
4	May 21	Review of social equity write-up; discussion of geographic value, service allocation and service types
5	June 3	Review of geographic value and service allocation write-up; interactive presentation on alternative services; discussion of service types
6	June 16	Discussion of preliminary draft principles and recommendations; interactive presentation on policies for purchasing service
--	Aug. 13 & 17	Technical workshop on target service level analysis and service types analysis
7	Sept. 17	Review of draft recommendations and report, follow up from Technical Workshops
8	Oct. 7	Review of final draft recommendations and report

D. Key Areas of Task Force Discussion

To carry out its charge, the Service Guidelines Task Force focused its review and discussion on the following key aspects of the guidelines and Metro's planning process. (See also the slides in Appendix 3).

Metro's Use of the Guidelines

As noted above, Metro uses the service guidelines to meet changing needs for transit service and to deliver efficient, high-quality service. The service guidelines provide direction in the following areas:

- Setting target service levels
- Evaluating system performance by service type
- Restructuring service
- Designing new service
- Making service investment and reduction decisions.

Most of the task force's discussion focused on the following areas of the guidelines.

Target service levels. Metro organizes its services in an All-Day and Peak Network. Metro uses three overall factors to set target service levels in this network: productivity, social equity and geographic value.

- ***Corridor Productivity:*** Metro views corridor productivity as the potential market for transit based on the land use characteristics of the corridor, as well as current transit use on a corridor. Metro assesses corridor productivity by looking at the numbers of:
    - Households
    - Jobs and students
    - Ridership.
- ***Social equity:*** Metro aims to serve areas that have many low-income and minority residents, and others who may depend on transit. Metro assesses social equity by looking at numbers of:
    - Riders boarding in low-income census tracts
    - Riders boarding in minority census tracts.
- ***Geographic value:*** Metro aims to respond to public transportation needs throughout the county. Metro assesses geographic value by looking at:
    - Connections to regional growth centers and manufacturing/industrial centers
    - Connections to transit activity centers.

To quantify and balance these factors, Metro uses a point system. The proportions and possible scores are as follows:

- ***50 percent for productivity.*** A corridor can have a score of between 0 and 20 for productivity (10 points for the number of households, and 10 points for the number of jobs and the student enrollment).
- ***25 percent for social equity.*** A corridor can have a score of between 0 and 10 total for social equity (5 points for low-income and 5 points for minority). A corridor scores 0 if it has fewer people boarding transit than the average boarding the system in all low-income or minority

census tracts combined, or scores 5 if it has more boardings than the system average in those areas.

- ***25 percent for geographic value***. A corridor can have a score of between 0 and 10 for geographic value. Corridors receive 5 points if they are the primary connection between transit activity centers, as designated in the Strategic Plan, and receive up to 10 points if they are the primary connection between regional growth or manufacturing/industrial centers.

Service types. Service types classify service into categories based on chosen criteria. Metro analyzes productivity in **Peak, Off-Peak, and Night** periods based on the market the route serves, using the following two service types:

- ***Seattle Core routes*** serve the greater downtown Seattle area (including downtown, First Hill, Capitol Hill, South Lake Union, and Uptown) and/or the University District, and connect these areas with any area in King County.
- ***Non-Seattle Core routes*** serve and operate wholly within other areas of Seattle and King County.

Route measures of performance and productivity: Metro uses two measures to assess the actual route usage and service performance of each route:

- ***Rides per platform hour***—Total number of riders divided by the total hours a bus travels, from the time it leaves its base until it returns
- ***Passenger miles per platform mile***—Total miles traveled by all passengers, divided by the total miles the bus operates from the time it leaves its base until it returns.

Peak-only service. Peak-only service operates only during peak travel periods (5:00–9:00 a.m. and 3:00–7:00 p.m. weekdays), primarily in one direction. Peak-only service typically brings riders from residential areas to job centers. All-day routes also offer service during peak periods, but this is not included in the definition of peak-only service.

Investments, reductions and restructures. When Metro needs to make decisions to invest, reduce or restructure service, Metro analyzes route productivity for each service type (based on riders per platform hour and passenger miles per platform miles, as described above), overcrowding, reliability, and target service levels.

When resources are available to make **investments** in service, Metro follows the order of its investment priorities. Metro bases investment need on two factors that demonstrate service quality (overcrowding and reliability) and on an analysis of unmet need, called target service levels. When resources are available, Metro uses the following priorities to make investment decisions:

- ***Priority 1:*** Reduce passenger overcrowding.
- ***Priority 2:*** Improve schedule reliability.
- ***Priority 3:*** Achieve target service levels.
- ***Priority 4:*** Become more productive.

The factors of productivity, social equity and geographic value come into play if or when the investment reaches Priority 3.

When making decisions to **reduce** service, Metro analyzes poor performing routes and considers target service levels, following the reduction priorities in the service guidelines.

When planning for service **restructures**, Metro considers route performance but also takes into account other factors, such as large-scale service and capital infrastructure enhancements. In general, restructures are made to improve the efficiency and effectiveness of the entire transit network, in accordance with the service restructure guidelines found in the Metro service guidelines.

Centers in King County

Centers are activity nodes throughout King County that form the basis for the countywide transit network. There are three types of centers: regional growth centers, manufacturing/industrial centers, and transit activity center. (See Appendix 2. Centers in King County.) The PSRC has identified regional growth centers and manufacturing/industrial centers as part of the *VISION 2040* plan. Centers are defined by the PSRC as:

- ***Manufacturing/Industrial Center*** – an area of intensive manufacturing and/or industrial activity.
- ***Regional Growth Center*** – a defined focal area within a city or community that has a mix of housing, employment, retail and entertainment uses. It is pedestrian-oriented, which allows people to walk to different destinations or attractions.

Transit activity centers are designated by Metro as areas of activity that include major destinations and transit attractions, such as large employment sites, significant healthcare institutions and major social service agencies. These centers support geographic value in the distribution of the network. Each transit activity center identified by Metro meets one or more of the following criteria:

- Is located in an area of mixed-use development that includes concentrated housing, employment, and commercial activity
- Includes a major regional hospital, medical center or institution of higher education located outside of designated regional growth centers
- Is located outside other designated regional growth centers at a transit hub served by three or more all-day routes.

Local jurisdictions may nominate additions to the list of transit activity centers. These nominations must meet one or more of the above criteria, plus the following additional criteria:

- Pathways through the transit activity center must be located on arterial roadways that are appropriately constructed for transit use.
- Identification of a transit activity center must result in a new primary connection between two or more regional or transit activity centers in the transit network, either on an existing corridor on the All-Day and Peak Network or as an expansion to the network to address an area of projected all-day transit demand. An expansion to the network indicates the existence of a new corridor for analysis.

- Analysis of a new corridor using step-one of the Target Service Level analysis process must result in an assignment of 30-minute service frequency or better.

Alternative Services

Metro's Alternative Services Program brings service to parts of King County that do not have the infrastructure, density or land use to support traditional fixed-route bus service, or where there are gaps in the coverage of fixed-route service. In such areas, alternative transportation services may be a better match for community transportation needs. Alternative services may also be more cost-effective. For such areas of the county, Metro works with the community and other partners to develop alternative services to serve community transportation needs. In developing these services, Metro seeks to:

- Collaborate with stakeholders to design a service that meets their needs
- Partner with communities to deliver and market these services
- Develop services that can be sustained over time.

Metro's existing alternative services are: VanPool, VanShare, Community Access Transportation (CAT), Dial-a-Ride Transit (DART), Community Shuttles, Community Hub and Flexible Rideshare. Community partnerships are especially important in developing the latter three. Examples of these services are: The Valley Shuttle (Snoqualmie Valley), Route 628 Issaquah Highlands to North Bend, the Burien Community Shuttle, the Mercer Island Community Shuttle, and the Redmond Flexible Rideshare. Projects are in planning in Duvall, Vashon Island and Southeast King County.

Long-Range Plan

Metro is currently in the process of developing a Long-Range Public Transportation Plan to consider what the transit system should look like in 2040. The process includes discussion with and multiple forms of input from community members, jurisdictions, stakeholders and the public. Many issues raised in the Service Guidelines Task Force are part of the Long-Range Plan process, including how the transit network will connect centers in the county, where future service investments should be made, how new markets should be seeded, and what funding and partnerships are needed to develop a robust transit network. Participation in the Long-Range Plan by stakeholders around the county will be key in determining the future of transit in King County. The Long Range Plan is expected to be submitted to the King County Council for review and adoption in mid-2016.