



KING COUNTY

1200 King County Courthouse
516 Third Avenue
Seattle, WA 98104

Signature Report

March 20, 2018

Motion 15094

Proposed No. 2017-0449.2

Sponsors Balducci

1 A MOTION relating to public transportation; accepting a
2 report identifying near- and long-term policy needs
3 identified as part of the METRO CONNECTS development
4 program as required by the work plan submitted with
5 Motion 14949.

6 WHEREAS, in January 2017, via Ordinance 18449, the King County council
7 adopted, and in February 2017 the executive approved, METRO CONNECTS, a long-
8 range transit service and capital plan that was developed with input from transportation
9 stakeholders, the King County council, the regional transit committee, the executive,
10 other jurisdictions and riders, and

11 WHEREAS, METRO CONNECTS is meant to be a living document setting the
12 vision for and guiding the implementation of Metro's long-range transit service and
13 capital networks while responding to growth throughout the county, and

14 WHEREAS, Ordinance 18449 required Metro to develop a work plan for the
15 establishment of the METRO CONNECTS development program to be transmitted to the
16 council with a motion for its approval by March 30, 2017, and

17 WHEREAS, Motion 14949 was transmitted with a work plan that requires Metro
18 to prepare a policy report to be transmitted to the council by motion by October 31, 2017,
19 to identify the near- and long-term policy needs and include: (1) a description of the

20 policy guidance that influences service and capital decisions in the regional project
21 schedule; (2) a gap analysis of additional policy that could make the METRO
22 CONNECTS development program more effective; and (3) preliminary
23 recommendations on any changes to policy that could be considered as part of this
24 program and potential timing and method for making those changes, and

25 WHEREAS, the transmitted policy report reflects Metro's best assessment of
26 METRO CONNECTS development program policy needs and priorities as of October
27 2017, and

28 WHEREAS, the regional transit committee has requested, and Metro has
29 accepted, a revised timetable so the committee can complete action by November 2019
30 on its recommended updates to the Strategic Plan for Public Transportation 2011-2021,
31 the King County Metro Service Guidelines and the METRO CONNECTS Long-Range
32 Plan;

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

34 A. The King County council hereby accepts the report entitled METRO
35 CONNECTS Development Program Policy Report, Attachment A to this motion.

36 B. To accomplish the proposed schedule of activity identified in this policy
37 report, the first biannual status update on the METRO CONNECTS development
38 program in June 2018 shall provide:

39 1. Detailed information about the regional service and capital projects
40 envisioned in the METRO CONNECTS 2025 service network, including but not limited
41 to:

42 a. description of the process for identifying and prioritizing planned service

43 increases and capital investments required to implement the METRO CONNECTS 2025
44 service network. This shall include information about how King County Metro intends to
45 use geographic value and social equity to determine the scale and sequence of both
46 service and capital investments; and

47 b. high-level estimates of projected funding needs, and shortfalls in funding
48 needed to implement METRO CONNECTS; and

49 2. Information about the role of partnerships, including but not limited to:

50 a. a description of different ways to partner, including innovative technology
51 and public-private partnerships, and a defined process for collaboration on each type of
52 partnership;

53 b. Metro's financial and other assumptions of how partnerships can or will
54 contribute to the projects listed in the Regional Project Schedule and the prioritization of
55 those projects. The role of partner commitments might include funding, planning, and
56 capital contributions to the delivery of transit service; and

57 c. strategies and programs to assist cities with less ability to partner on transit
58 projects.

59 C. The second biannual status update on the METRO CONNECTS development
60 program, anticipated to be transmitted in January 2019, shall provide additional
61 information on these topics as requested by the regional transit committee.

62 D. The policy report identifies partnerships and the service network as the two
63 work areas in need of updated policy language. If regional transit committee discussion
64 of those work areas identifies other work areas for which policy language should be
65 revised, the committee intends to work with stakeholders and Metro on those revisions.

66 E. In future years, one biannual status update shall include an evaluation of
67 funding available to implement METRO CONNECTS and the projected shortfall or
68 funding gap. One biannual status update shall include a description of the status of
69 projects in the Regional Project Schedule, both planned and underway, needed to
70 implement METRO CONNECTS. Project descriptions should include the current project
71 phase and what is needed to complete the project.

72

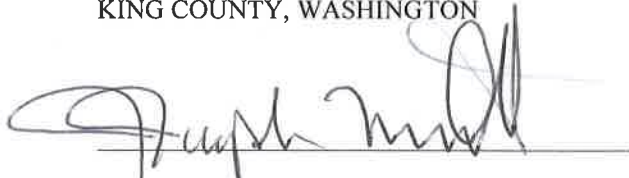
Motion 15094 was introduced on 10/23/2017 and passed by the Metropolitan King
County Council on 3/19/2018, by the following vote:

Yes: 9 - Mr. von Reichbauer, Mr. Gossett, Ms. Lambert, Mr. Dunn,
Mr. McDermott, Mr. Dembowski, Mr. Upthegrove, Ms. Kohl-Welles
and Ms. Balducci

No: 0

Excused: 0

KING COUNTY COUNCIL
KING COUNTY, WASHINGTON



J. Joseph McDermott, Chair

ATTEST:



Melani Pedroza, Clerk of the Council

Attachments: A. METRO CONNECTS Development Program Policy Report dated 2-21-18



15094

King County Metro Transit

METRO CONNECTS Development Program Policy Report

Identifying the near- and long-term policy needs to support METRO CONNECTS

February 21, 2018

Prepared for:
King County Council

Prepared by:



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Metro Transit Division
Service Development Section
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METRO CONNECTS Development Program Policy Report

Introduction

METRO CONNECTS presents the first long-range vision for Metro Transit service in more than 20 years. A key component of the plan is the METRO CONNECTS Development Program (MCDP), a rolling program for coordinating internally and with jurisdictions to deliver near-term service changes and supporting capital investments and to perform other program and policy work. **To better understand Metro’s current policies and identify policy guidance needs to more transparently implement METRO CONNECTS, the King County Council and Regional Transit Committee requested this 2017 Policy Report. The report describes the policy guidance that influences service and capital decisions, provides an analysis of additional policy needs that could make the METRO CONNECTS Development Program more transparent and efficient, and gives preliminary recommendations on policy guidance needs that could be considered and the potential timing and method for making those changes.**

The MCDP was created to guide the agency toward the METRO CONNECTS vision. The MCDP aims to provide additional clarity to jurisdictions, internal stakeholders, elected officials, and agency partners on the timing and substance of Metro’s efforts to achieve the METRO CONNECTS vision. The Development Program also provides a regular forum to engage and coordinate with cities on the implementation of METRO CONNECTS through the Program’s Technical Advisory Committee (TAC).

In collaboration with the TAC, the MCDP is developing a Regional Project Schedule to further support an ongoing discussion among Metro, local agencies and jurisdictions about where, how much, and when Metro will invest in the service and capital improvements that METRO CONNECTS envisions. This schedule will also help Metro plan internally, ensure it has sufficient resources, and work with external parties to plan capital investments needed to support service investments. The schedule is dynamic—it will change depending on Metro’s financial outlook, policy updates, organizational capacity to deliver, and partnerships with jurisdictions and others. It will be updated as our ability to deliver services and projects becomes clearer. The MCDP is planned to be a rolling program, using the policy guidance outlined in this report to inform decision-making in 6-10-year increments over each successive biennium.

Background

The King County Council adopted Ordinance 18449, approving METRO CONNECTS, on January 23, 2017. The ordinance also required the creation of a work plan to guide the MCDP, to be transmitted by the Executive on March 30, 2017. The ordinance required the work plan to include:

1. The process to establish and the elements to be contained within the MCDP. Elements of the MCDP will include:
 - a. Policy guidance regarding the timing and substance of service and capital policy decisions
 - b. Identification of policy guidance and deliberation needed to increase the effectiveness of implementing the METRO CONNECTS long-range plan
 - c. Collaboration between Metro and Metro's jurisdictional and regional partners with the goal of enabling Metro to work with jurisdiction and agency staff, elected officials, the RTC, and the King County Council to collaborate and provide input on project development and implementation
2. The participants that will be engaged in development of the MCDP and their roles
3. The Regional Transit Committee's (RTC) role as part of implementing the work plan in addition to its review and recommendation of the motion to approve the MCDP work plan
4. A timeline to establish the MCDP by October 31, 2017.

On September 18, 2017 the King County Council approved Motion 14949 approving the work plan to establish the MCDP as required in Ordinance 18449. The MCDP work plan outlined three deliverables:

1. This **Policy Report**, which is required to identify the near- and long-term policy needs that will be transmitted to Council by Motion by October 31, 2017 and will be reviewed by the RTC. The report will include:
 - **A description of the policy guidance** that influences service and capital decisions in the regional project schedule
 - **A gap analysis** of additional policy that could make the METRO CONNECTS Development Program more effective
 - **Preliminary recommendations on any changes to policy** that could be considered as part of this program and potential timing and method for making those changes.
2. A **Regional Project Schedule** that lists the timing and substance of major service and capital projects needed to deliver the METRO CONNECTS 2025 service network. The Regional Project Schedule includes major service change initiatives and corresponding capital projects necessary for efficient and effective operations.
3. **Biannual status updates** to the RTC and the King County Council on the status of the METRO CONNECTS Development Program, including the program's connection to Metro's guiding policies and the development of the regional service

and capital project schedule created in coordination with the Technical Advisory Committee.

This document is the policy report to be prepared and transmitted to the King County Council by October 31, 2017 to fulfill the requirement of the work plan approved in Motion 14949 September 18, 2017.

Description of Current Policy Guidance

These Metro policy documents guide the planning and implementation of service and capital projects as Metro moves toward the METRO CONNECTS vision:

- King County Fund Management Policies for the Public Transportation Fund (Ordinance 18321, Attachment A)
- King County Metro Strategic Plan for Public Transportation, 2011-2021 (2015 Update)
- King County Equity and Social Justice Strategic Plan 2016-2022 (2016)
- King County Metro Service Guidelines (2015 Update)
- METRO CONNECTS long-range plan (adopted 2017)

King County's Fund Management Policies for the Public Transportation Fund provide overarching policy guidance for prioritizing service and capital projects:

"The Transit Division will manage its finances to fund expenditures in the following order:

- (1) debt service;
- (2) operation of the current transit system levels,¹ including asset maintenance and replacement;
- (3) maintenance and replenishment of reserves;
- (4) new transit service and capital investments necessary to achieve All Day and Peak Network priorities identified by the King County Metro Service Guidelines, and new transit service and capital investments necessary to achieve elements of the long range vision identified in Metro Connects."

The Metro Strategic Plan and Service Guidelines provide guidance on managing the system and investing in service needs identified in the annual System Evaluation Report. The System Evaluation Report identifies where service investments are needed to reduce passenger crowding, improve schedule reliability, and increase service frequencies to meet target levels throughout the county. METRO CONNECTS provides guidance on investments needed to develop the envisioned future network. As each change to service approaches, Metro's policy is to conduct a public engagement process with affected communities to better understand their needs and gather feedback on specific service and capital proposals.²

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

² "Planning and Community Engagement," pg. 27-28, Metro Service Guidelines

As illustrated above, investment in and maintenance of capital infrastructure is the second priority of the King County Fund Management Policies for the Public Transportation Fund, after debt service and is critical to providing effective, efficient, and safe service. Capital investments are prioritized to ensure that the infrastructure is developed and maintained in a state of good repair, which is necessary to operate, improve, and expand service.

Rationale and Policy Guidance that Influence Future Service Decisions

Metro reviewed existing policies to distill the following five prioritized principles to guide future service decisions. The principles incorporate Metro's guiding policies, internal and external constraints, and the priorities of jurisdiction and agency partners. The principles that guided our development of the Regional Project Schedule are:

- Service Principle 1: Work within Metro's organizational capacity, financial limitations, and other constraints, and adjust the Regional Project Schedule in response
- Service Principle 2: Manage system performance
- Service Principle 3: Deliver METRO CONNECTS 2025 Service Network by integrating service with Sound Transit projects
- Service Principle 4: Deliver the METRO CONNECTS 2025 Service Network by supporting partnerships and partner priorities
- Service Principle 5: Deliver the remaining METRO CONNECTS 2025 Service Network by investing in service that supports system productivity, social equity, and geographic value throughout King County

To develop the Regional Project Schedule, Metro considered its capacity and constraints as it applied each principle. For each principle, a table in the following pages lists the most relevant existing policy documents that influenced development of that principle, the guidance provided, and document references.

Service Principle 1: Work within Metro’s organizational capacity, financial limitations and other constraints, and adjust the Regional Project Schedule in response

Expansion, enhancement, and restructure of Metro’s service network and delivery of supporting capital requires a major commitment of the agency’s resources and organizational capacity. The MCDP’s development of the future service schedule will consider Metro’s current organizational capacity as well as current and future efforts to increase the agency’s ability to deliver service and supporting capital.

Changes to service will need to be designed to minimize negative impacts on speed, reliability, and service quality that can result from implementing more service than Metro’s resources and organizational capacity can support. While Metro is committed to implementing the 2025 Service Network, the specific timing of service investments will be subject to:

- available financial resources,
- service delivery constraints, including the hiring and training of operators,
- the capacity of the capital planning and delivery program.

Metro will continue working internally to align resources and increase capacity to move toward the METRO CONNECTS vision. Service schedules will be updated in response to these considerations.

Existing Policy Document	Guidance Provided	Policy References
<p>METRO CONNECTS</p>	<p>Metro should expand the capacity of system supports, critical operations, and fleet:</p> <ul style="list-style-type: none"> • Directs Metro to expand its fleet with state-of-the-art vehicles to support system expansion. • Calls for investment in critical operations and system preservation components needed to expand, improve, and operate service. Components include bus bases, support facilities, and maintenance. • Envisions that Metro would expand capacity of transit support systems by 2025, allocating service by considering available resources. 	<p>METRO CONNECTS pp. 56-59, 62-65, 70, 75</p>
	<p>Metro should develop a workforce that can support the long range vision:</p> <ul style="list-style-type: none"> • Describes how Metro would have to substantially grow and train its workforce, respond to a high retirement rate, and keep employee skills up to date to deliver the METRO CONNECTS service networks. 	<p>METRO CONNECTS pp. 66</p>

<p>Service Guidelines</p>	<p>Metro should consider operational constraints when making investments:</p> <ul style="list-style-type: none"> • Provides guidance to take into account operational considerations when prioritizing investments. • Notes that prioritization of service that is fully or partially partner-funded is subject to operational infrastructure constraints. 	<p>Service Guidelines p. 29, 25-26</p>
<p>King County Metro Strategic Plan</p>	<p>Metro should improve customer satisfaction:</p> <ul style="list-style-type: none"> • Provides policy guidance to improve satisfaction with Metro’s products and services and the way they are delivered, including improvement of transit speed and reliability. Meeting this guidance will require that adequate capital capacity is in place to meet the goal of increased customer satisfaction. 	<p>Goal: 5 Objective: 5.1 Strategies: 5.1.3</p>
	<p>Metro should ensure a quality workforce:</p> <ul style="list-style-type: none"> • Calls for Metro to hire, train, and retain an efficient, effective, and productive workforce—a key to increasing the organizational capacity to deliver the 2025 Service Network. Ensuring that organizational capacity is keeping up with service growth is critical to maintain service quality, reliability, and avoiding trip cancellations. 	<p>Goal: 8 Objective: 8.1, 8.2 Strategies: 8.1.1, 8.1.2, 8.2.1, 8.2.3</p>
<p>Fund Management Policies</p>	<p>Make prudent financial decisions by investing in the operation of current transit system levels:</p> <ul style="list-style-type: none"> • The Transit Division will manage its finances to fund expenditures in the following order: (1) debt service; (2) operation of the current transit system levels, including asset maintenance and replacement; (3) maintenance and replenishment of reserves; (4) new transit service and capital investments necessary to achieve All Day and Peak Network priorities identified by the Service Guidelines, and new transit service and capital investments necessary to achieve elements of the long-range vision in Metro Connects. 	<p>Ordinance 18321 Attachment A</p>

Service Principle 2: Manage system performance

Metro prioritizes the management and preservation of its existing system prior to investing in future improvements to the network. This includes investments in operational needs and funded commitments, such as the provision of service mitigation and comfort station access, and then investments to improve overcrowding and service reliability (Service Guidelines Priorities 1 and 2).

Existing Policy Document	Guidance Provided	Policy References
METRO CONNECTS	Take care of the existing system: <ul style="list-style-type: none"> Support the existing system by keeping current assets in good working condition 	METRO CONNECTS pp. 84
Service Guidelines	Invest first in passenger loads and schedule reliability: <ul style="list-style-type: none"> Investments are based on the passenger load and schedule reliability guidelines used to assess service quality. Routes that do not meet the standards are considered to have low-quality service that has a negative impact on riders and could discourage them from using transit. 	Service Guidelines pp. 30
Fund Management Policies	Make prudent financial decisions by investing in the operation of current transit system levels: <ul style="list-style-type: none"> Operate the current transit system levels, including asset maintenance and replacement. 	Ordinance 18321 Attachment A

Service Principle 3: Deliver METRO CONNECTS 2025 Service Network by integrating service with Sound Transit projects

METRO CONNECTS envisions a service network of frequent, express, and local and flexible services throughout the county in 2025. The future service schedules will be developed by the MCDP with the intent of delivering the 2025 METRO CONNECTS network, including the integration of bus service with Sound Transit’s high-capacity transit (HCT), comprised of light rail and bus rapid transit. The MCDP’s future service schedule will be timed to leverage these investments to create an integrated service network through the implementation of seven service network restructures.

Existing Policy Document	Guidance Provided	Policy References
METRO CONNECTS	<p>Develop the METRO CONNECTS 2025 network:</p> <ul style="list-style-type: none"> Establishes preliminary draft route alignments and operational characteristics of the proposed 2025 Service Network of frequent, express, and local service. 	METRO CONNECTS pp. 20-37
	<p>Integrate with high-capacity transit:</p> <ul style="list-style-type: none"> Envisions “one system that’s easy to use,” including integration of Metro’s bus service with Sound Transit’s high-capacity transit. The 2025 Service Network is intended to leverage planned HCT investments, which in some cases replace existing bus service, allowing Metro to redeploy hours to help build the 2025 network. 	METRO CONNECTS pp. 20-22
Service Guidelines	<p>Maximize investments made in the transportation network:</p> <ul style="list-style-type: none"> Provides guidance that routes should be designed to efficiently connect to other parts of the transportation network, including light rail. 	Service Guidelines p. 17
	<p>Restructure service when the transportation network changes:</p> <ul style="list-style-type: none"> Identifies triggers for when restructures are considered, including as a response to extension or service enhancements to Link light rail, Sounder commuter rail, and Regional Express bus services. 	Service Guidelines pp. 21-22

Service Principle 4: Deliver the METRO CONNECTS 2025 Service Network by supporting partnerships and partner priorities

METRO CONNECTS envisions a service network of frequent, express, and local and flexible services throughout the county in 2025. The future service schedules will be developed by the MCDP with the intent of delivering the 2025 METRO CONNECTS network, including the network of 13 new or improved RapidRide lines, of which seven are funded in partnership with the City of Seattle through the Move Seattle levy.

The MCDP Regional Project Schedule will reflect service and capital partnerships as well as local priorities identified through the TAC and the development of METRO CONNECTS. While Metro must balance the needs of specific jurisdictions with those of the overall transit network, the agency strives to be responsive to local priorities and pursue available partnership opportunities whenever possible. METRO CONNECTS calls for new and expanded capital partnerships to implement the vision laid out in the plan. Metro will need to work with cities in various ways to make progress on the Regional Project Schedule.

Existing Policy Document	Guidance Provided	Policy References
<p>METRO CONNECTS</p>	<p>Develop the METRO CONNECTS 2025 network:</p> <ul style="list-style-type: none"> Establishes preliminary draft route alignments and operational characteristics of the proposed 2025 Service Network of frequent, express, and local service. 	<p>METRO CONNECTS pp. 20-37</p>
	<p>Work closely with partners to implement METRO CONNECTS:</p> <ul style="list-style-type: none"> Envisions Metro working closely with jurisdictions and agencies to develop projects and pursue transit-supportive growth and policies. 	<p>METRO CONNECTS p. 18</p>
	<p>Expand the ways we work with partners:</p> <ul style="list-style-type: none"> Calls for the formation of partnerships through the Development Program, especially to complete capital projects. Requires that the Development Program be informed by input from regional partners, including input on local and regional plans, known projects, land-use changes, and local priorities for transit service. 	<p>METRO CONNECTS pp. 70, 79-80</p>

<p>Service Guidelines</p>	<p>Describes how Metro can form partnerships:</p> <ul style="list-style-type: none"> • Provides policy guidance on the nature of service and infrastructure partnerships, and on how service funded through partnerships is prioritized. Infrastructure partnership examples on page 26 show how jurisdictions may work with Metro to support service. Allows for exceptions to established priorities to leverage partner funding for service. 	<p>Service Guidelines pp. 25-26</p>
<p>King County Metro Strategic Plan</p>	<p>Directs Metro to foster partnerships in a variety of areas including:</p> <ul style="list-style-type: none"> • <u>Fixed-route service</u>: Supports development of funding partnerships to increase transit service levels. • <u>Community Connections</u>: Directs Metro to foster local partnerships to create alternative transit services, which would include Community Connections services. • <u>Local land use</u>: Provides guidance for Metro to support the county’s economy by encouraging city policy and development that supports and can be efficiently served by transit. • <u>Non-motorized and parking</u>: Supports partnering with agencies, jurisdictions, and other local partners to improve transit access through non-motorized and motor vehicle parking infrastructure. 	<p>Goal: 3 Objective: 3.1, 3.2 Strategies: 3.1.1, 3.2.1, 3.2.2</p> <p>Goal: 2 Objective: 2.1 Strategies: 2.1.1, 2.1.4</p> <p>Goal: 3 Objective: 3.1, 3.3 Strategies: 3.1.1, 3.3.1</p> <p>Goal: 3 Objective: 3.2, 3.3 Strategies: 3.2.3, 3.2.4, 3.3.2</p>

Service Principle 5: Deliver the remaining METRO CONNECTS 2025 Service Network by investing in service that supports productivity, social equity and geographic value

METRO CONNECTS envisions a service network of frequent, express, and local and flexible services throughout the county in 2025. The future service schedules will be developed by the MCDP with the intent of delivering the 2025 METRO CONNECTS network, including the network of 13 new or improved RapidRide lines. This principle supports the implementation of the METRO CONNECTS vision not addressed in the prior principles, as well as additional restructures and service investments needed to deliver the METRO CONNECTS 2025 network (including Service Guidelines Priority 3 investments consistent with METRO CONNECTS).

The METRO CONNECTS 2025 Service Network was planned to meet transit needs throughout King County. The MCDP develops a potential service schedule for each biennium, which supports Metro's goals of productivity, social equity, and geographic value throughout the county, including those areas without planned high-capacity transit (RapidRide, light rail, bus rapid transit). The MCDP's engagement with city staff has highlighted that centers throughout the county are growing, and in order to increase mobility across the county, Metro will need to enhance connections among these centers. The need for these enhancements may result in earlier implementation of service changes throughout the county than the Service Guidelines alone would suggest.

Increasing access to opportunity for low-income and minority communities will also continue to be an agency priority, as it was with the development of the METRO CONNECTS 2025 network. The MCDP potential service schedule will move Metro closer to the 2025 network by increasing transit access and service levels in areas with large minority and low-income populations, consistent with Metro's Service Guidelines. As Metro strives to support King County's equity and social justice goals and meet our METRO CONNECTS vision of bringing frequent service to 77 percent of low income and 87 percent of minority residents by 2040, our guiding policies help us make decisions that are pro-equity and contribute to improved community conditions. This pushes Metro to continually align our products and services to support King County's determinants of equity.

While expanding RapidRide and integrating with Sound Transit's light rail and bus rapid transit investments are critical elements of the Regional Project Schedule, Metro plans to continue investing in service that supports its goals, consistent with guiding policy documents and the aim of balancing investment throughout the county, as light rail and bus rapid transit will not directly serve all parts of the county. Metro will continue to play a critical role in providing mobility throughout the region.

Existing Policy Document	Guidance Provided	Policy References
METRO CONNECTS	Develop the METRO CONNECTS 2025 network: <ul style="list-style-type: none"> Establishes preliminary draft route alignments and operational characteristics of the proposed 2025 Service Network of frequent, express, and local service. 	METRO CONNECTS pp. 20-37
	<ul style="list-style-type: none"> Calls for service allocation as a result of the MCDP to be shaped by several factors, including social equity and a distribution of service across all areas of the county. 	METRO CONNECTS p. 79
Service Guidelines	<ul style="list-style-type: none"> Provides guidance for Metro to consider geographic value and social equity impacts, in addition to the corridor score, when prioritizing investments in the transit network. 	Service Guidelines p. 29
King County Metro Strategic Plan	<ul style="list-style-type: none"> Calls for Metro to provide services that are designed to provide geographic value in all parts of King County, and for the long-range plan to remain consistent with the values in the Strategic Plan and Service Guidelines, including the value of geographic value. 	Goal: 2, 6 Objective: 2.1, 6.1 Strategies: 2.1.3, 6.1.2
	<ul style="list-style-type: none"> Overall, directs Metro to create a transportation system that emphasizes productivity, while ensuring social equity and geographic value are supported. Provides guidance that Metro’s long-range Plan is to remain consistent with the policies and values of the Strategic Plan and Service Guidelines, including the value of social equity. 	Goal: 6 Objective: 6.1 Strategy: 6.1.2
King County Equity and Social Justice Strategic Plan	<ul style="list-style-type: none"> Calls for an organization that actively supports social equity, and for King County to be pro-equity in service delivery. Provides guidance that equity and social justice considerations should be incorporated into decision-making for operations and service delivery. 	Leadership Operations and Services: Goal 2, Goal 4 Plans, Policies and Budgets: Goal 2, Goal 3

Principles and Policy Guidance that Influence Future Capital Decisions

Capital improvements in the MCDP future capital schedule will support the transit system restructuring and expansion necessary for the 2025 network, such as critical infrastructure, support systems, corridor improvements, and passenger facility improvements. The timing and substance of capital improvements will be planned using the future service schedule.

As noted in this report's *Description of Policy Guidance* section, King County's Fund Management Policies for the Public Transportation Fund provide policy guidance for prioritizing capital projects. Consistent with these financial policies, the MCDP will use the following principles to develop the future capital schedule:

Capital Priority 1: Maintain operation of current transit system levels, including asset maintenance and replacement

Consistent with priority two of the Fund Management Policies, the future capital schedule will identify elements that are critical to the delivery of current service, including modernization of capital assets, state of good repair, base capacity, layover, support and maintenance facilities, safety, and fleet. Asset maintenance and capital support for major restructures of existing service will be included.

Capital Priority 2: Provide new transit capital investments necessary to achieve elements of the METRO CONNECTS long-range vision

Consistent with priority four of the Fund Management Policies, the future capital schedule will identify capital elements needed to develop the 2025 METRO CONNECTS service network, beyond existing capital capacity and facilities. The METRO CONNECTS vision for capital elements will influence development of the future capital schedule. Major capital elements envisioned include the following:

Provide critical service supports

Critical capital elements supporting operations, workforce, and maintenance must be in place to support service expansion and enhancement. The capital elements include increased bus base capacity to operate and maintain an expanded fleet and workforce, maintenance facilities, bus layover, new fleet, intelligent transportation system infrastructure, and other critical capital projects and programs.

Develop an integrated high-capacity transit (HCT) network

METRO CONNECTS envisions developing the capital necessary to implement the planned 2025 HCT network, including RapidRide and bus service restructures to integrate with Sound Transit light rail and bus rapid transit. These capital elements include new major transit hubs, non-motorized and parking access improvements, customer communication infrastructure, and bus speed and reliability improvements.

Expand and enhance the non-HCT system

METRO CONNECTS envisions that Metro will support service expansion and enhancement by implementing capital projects to improve transit speed, reliability, access, passenger facilities and customer experience for all service types.

METRO CONNECTS and other guiding policy documents provide specific guidance on the type of capital elements envisioned to support the development of the 2025 Service Network. This guidance will influence the future capital schedule, and is outlined in the following table.

Existing Policy Document	Guidance Provided	Policy References
METRO CONNECTS	<ul style="list-style-type: none"> Envisions major expansion of RapidRide, adding 13 new RapidRide lines in the 2025 Service Network 	METRO CONNECTS p. 29
	<ul style="list-style-type: none"> Calls for an unprecedented level of capital investment to improve transit speed and reliability. New RapidRide lines would have the highest level of investment, followed by existing RapidRide lines, frequent service, express service, and local service. 	METRO CONNECTS p. 40
	<ul style="list-style-type: none"> Envisions improvements at 85 existing and new transit centers, including light rail and BRT stations and transit centers. 	METRO CONNECTS p. 50
King County Metro Strategic Plan	<ul style="list-style-type: none"> Calls for providing and maintaining capital assets to support efficient and effective service delivery and to replace aging infrastructure. 	Goal: 6 Objective: 6.2 Strategy: 6.2.2
King County Equity and Social Justice Strategic Plan	<ul style="list-style-type: none"> Directs capital work to be in accordance with community equity priorities, informed by a perspective on historic and existing inequities, and include a description of their contribution to improving equity in community conditions. 	Facility & System Improvements Goal: 2

The Regional Project Schedule reflects all of these capital priorities; however, capacity constraints may require Metro and partner agencies to make choices about which capital elements are most critical to implement. Should critical capital improvements be delayed, service implementation timelines may be affected.

Identification of Policy Needs

Metro reviewed the work areas and suggested actions identified in each section of METRO CONNECTS to determine what policy updates may be needed to increase the effectiveness of implementing METRO CONNECTS.

The list of work areas, actions, and identified policy needs are shown in the following table.

METRO CONNECTS Work Areas	METRO CONNECTS Actions	Identified Policy Need
Partnerships	Partnerships are included in many METRO CONNECTS work areas related to the service network, improving service quality, and critical service supports. Partnerships are critical to implement the capital components of METRO CONNECTS.	Define partnerships: Additional direction is needed regarding the definition of “partnership,” particularly related to capital and infrastructure. Metro will clarify and dedicate more resources to its process for working with jurisdictions with varying levels of financial resources.
Service Network	METRO CONNECTS envisions an expanded network of more frequent, faster, more reliable service in 2025 and 2040. The plan also directs Metro to implement new and innovative services. Implementing METRO CONNECTS through network restructuring is essential to effectively transition our current legacy system to a future network that is aligned with current and future demographic patterns and travel needs.	Update policy documents including but not limited to the Strategic Plan for Public Transportation 2011-2021, the King County Metro Service Guidelines, and the METRO CONNECTS Long Range Plan, to include clear guidance prioritizing investments in the future network, including: service hours, speed and reliability, critical service support for fleet and layovers, access to transit, passenger facilities, base capacity and capital projects. Existing policy in the Service Guidelines identifies investment needs of the current network, and prioritizes service investment to address those needs on a route or corridor basis. METRO CONNECTS envisions a network of integrated services that is different from today’s network.
Speed and Reliability	The plan calls for a major expansion of Metro’s capital program to	No update to policy needed at this time.

	improve transit speed and reliability.	
Accessible Transportation Options	METRO CONNECTS envisions better meeting diverse customer needs by improving planning processes and customer information, and by piloting new service models.	No update to policy needed at this time.
Access to Transit	METRO CONNECTS calls for Metro to improve access to transit through a variety of strategies.	No update to policy needed at this time.
Innovation and Technology	METRO CONNECTS calls for Metro to invest in and encourage innovation to improve the customer experience and develop new services.	No update to policy needed at this time.
Passenger Facilities	The plan outlines actions to build a network of safe and well-designed stops, stations, and hubs.	No update to policy needed at this time.
Regional Integration	A key component of attaining the METRO CONNECTS vision is integration of regional planning and implementation.	No update to policy needed at this time.
Operations and System Preservation	METRO CONNECTS identifies investment needed to increase base capacity, safety and security infrastructure, information technology, and support systems.	No update to policy needed at this time.
Boardings and Fares	The plan envisions significant improvements to make boarding and fare payment easier and faster.	No update to policy needed at this time.
Customer Communications	The plan envisions actions to improve the information provided to customers, make it easier to access and use, and help customers know what services are available.	No update to policy needed at this time.
Managing Demand	METRO CONNECTS calls for Metro to help maximize the efficiency of our transportation network by developing new tools and working with partner cities and agencies.	No update to policy needed at this time.
Transit-Oriented Development	A more active role in building and promoting transit-oriented development is envisioned in the plan.	No update to policy needed at this time.

<p>Critical Service Supports: Fleet, Layover, Workforce</p>	<p>The plan envisions a major expansion in state-of-the-art fleet, layover, and continuous growth and development of Metro’s workforce to implement the vision.</p>	<p>No update to policy needed at this time.</p>
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Overall, Metro determined that there is sufficient policy guidance for near-term implementation in all work areas of METRO CONNECTS, and that longer-term implementation will be more effective and transparent with policy updates in two areas: 1) partnerships and 2) service network investment priorities.

Metro has existing policies in these two areas, but also asserts that the region would benefit from further targeted dialogue to ensure that expectations are clear about how to partner and how and when Metro will implement service. Metro intends to engage the Regional Transit Committee and King County Council in a discussion about updating policy, and Metro plans to update Metro’s Strategic Plan, Service Guidelines, and METRO CONNECTS to reflect their input.

Policy Need 1: Clarity on Partnerships and Ways to Work Effectively with Cities
 METRO CONNECTS envisions new and expanded partnerships to implement METRO CONNECTS through the Regional Project Schedule. As a regional service provider, Metro will continue providing service to jurisdictions throughout King County and supporting partnerships. Through the MCDP, Metro will collaborate with cities to implement the capital projects needed to ensure the successful and timely implementation of METRO CONNECTS. Metro will encourage cities to work with Metro on the capital projects and will ensure that any partnership is consistent with the METRO CONNECTS vision.

The process of expanding and clearly defining capital partnerships will provide valuable opportunities for Metro to work with jurisdictions of varying capacity and available resources. For this to be successful, Metro will need to intentionally develop its partnership program, dedicating additional staff resources to engage with cities to effectively leverage their strengths and resources (including nonfinancial resources) to implement the regional transit improvements called for in METRO CONNECTS. Some nonfinancial actions cities could take as part of a capital partnership include, but are not limited to:

- Streamlining permitting processes for transit-related improvements
- Providing right-of-way for transit and signal priority
- Integrating transit-supportive elements in existing projects
- Improving and emphasizing transit-supportive land-use policies
- Improving access to transit via infrastructure
- Prioritizing access to transit improvements in their comprehensive plans, pedestrian and bike plans, and transportation improvement programs.

Financial contributions from some cities may also be essential to the successful completion of certain capital elements of METRO CONNECTS. However, since cities have the most direct control over the permitting, right-of-way, local policy, and infrastructure needed to implement METRO CONNECTS, a partnership process that recognizes and utilizes the individual strengths of jurisdictions will support long-term success of the region.

Current policy language in the Service Guidelines³ provides examples of how jurisdictions could support transit through policy changes or infrastructure investments. However, Metro's work with city staff through the MCDP's TAC has continued to highlight the need for additional clarity on capital and infrastructure partnerships and other ways to collaborate with Metro. Additional guidance to clarify the "partnerships" term and its practical use could support coordination and development of potential partnerships and cooperation with jurisdictions. By clarifying the focus of and expectations for partnerships and leveraging our individual strengths, Metro and jurisdictions can succeed as a region in implementing our long-range vision.

Policy Need 2: Service Network Priorities

The Regional Project Schedule outlines a future service and capital investment schedule that enables Metro and partners to validate the timing of potential service changes to support service levels described in METRO CONNECTS. The Regional Project Schedule reconciles the needs identified in the Service Guidelines, which invest in Metro's current service network, with needs identified in METRO CONNECTS, which focuses on investments needed in the future.

Current policy focuses on balancing investment in the needs of the existing network (the Service Guidelines) with the future network (METRO CONNECTS) and allows for investment in both sets of needs. This policy is sufficient in the near term since some of the Priority 3 investments identified in the Service Guidelines overlap with the future METRO CONNECTS network. However, additional clarity is needed on how Metro should prioritize service investment to create the METRO CONNECTS network, expand RapidRide, and deliver envisioned service levels on METRO CONNECTS routes. Updates to policy guidance should provide more clarity on how the Service Guidelines prioritize investment to reach service levels in METRO CONNECTS.

³ "Infrastructure Partnerships," p. 26, Service Guidelines

Recommendations to Address Policy Needs

Metro’s existing policy provides sufficient flexibility and guidance to plan service and capital investments to support the implementation of METRO CONNECTS 2025 vision over the next biennium. While the Service Guidelines do not reference specific corridor service levels in METRO CONNECTS, they do state that Metro considers METRO CONNECTS, among other factors, when prioritizing investments in the transit network.⁴

The Regional Project Schedule was developed using existing policy guidance, balancing the needs of the existing system with the county’s growing transit demand. Metro recommends working with the King County Council and RTC in 2018-2019 to address two identified policy needs and to update Metro’s Service Guidelines and Strategic Plan in 2018 and 2019.

To address the policy needs identified in this report, Metro proposes the following work areas and schedule:

Proposed Work Areas

Partnerships and working with cities:

- 1. Clarify the definition of the term “partnership,” particularly related to capital partnerships, and the implications for Metro service and capital planning.**

METRO CONNECTS envisions a broader and more comprehensive range of partnerships to effectively implement our long-range vision and the capital needed to support it. Metro intends to work with cities on the capital projects that will enable transparent and effective implementation of METRO CONNECTS. Metro expects to remain a regional service provider while working with jurisdictions of all capacity levels to leverage their individual strengths and resources—financial and otherwise—to make the capital improvements needed to implement METRO CONNECTS. Metro will dedicate additional staff time to make these collaborations successful. Metro proposes to discuss options for how the Service Guidelines and other policy documents can better describe the different ways jurisdictions can support transit and how those avenues could impact Metro planning.

- 2. Consider potential implications of social equity and geographic value on the definition and execution of partnerships.**

There are many ways to work with Metro to support the delivery and expansion of transit service. Jurisdictions have varying capabilities to contribute toward financial partnerships. Metro

⁴ “Adding service: investment priorities,” pg. 29, Service Guidelines

proposes to explore how the Service Guidelines and other policy documents reflect social equity and geographic value in the way partnerships are defined and implemented across the county.

3. Clarify Metro’s expectations for the level of support and engagement needed from cities for expanding RapidRide service and other major corridor projects.

METRO CONNECTS assumed significant partner contributions to support the implementation of RapidRide and other major corridor expansion. Metro understands that cities have varying levels of capacity and resources, and these contributions could take many forms. However, in order for RapidRide implementation to stay on schedule, Metro needs jurisdictions to be willing partners that are actively engaged and making significant efforts to support planning and implementation. Throughout this process, Metro will provide jurisdictions with more clarity on additional actions they could take to support major corridor projects, including RapidRide.

Service network priorities:

4. Integrate METRO CONNECTS service levels with Service Guidelines investment prioritization.

Given different priorities in METRO CONNECTS and the Service Guidelines, Metro must balance current and future service needs. Policies in both the King County Fund Management Policies for the Public Transportation Fund and the Service Guidelines support investment in both systems. In the future, it would be helpful for Metro to reconcile the Service Guidelines and METRO CONNECTS to clarify next steps. Metro proposes to discuss options to modify the Service Guidelines to attain the METRO CONNECTS vision in a transparent and efficient manner, including potential changes to how the Service Guidelines prioritize investments to reach the service levels described in METRO CONNECTS.

Proposed Schedule of Activity

Objectives & Timing	2017	2018				2019				2020			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Discuss how Metro can work better with cities with MCDP, TAC Ongoing													
Review and discuss MCDP Policy Report with Council, RTC Oct 2017–Dec 2017													
Discuss partnerships and service network with Council, RTC to inform update to Service Guidelines in 2019 Jan 2018–November 2018													
King County 2019-2020 business planning process Jan 2018–Dec 2018													
Develop changes to Strategic Plan and Service Guidelines November 2018–May 2019													
Transmit recommended changes to Council, RTC										★ May 2019			
RTC recommendation on Service Guidelines update (anticipated)										Nov 2019 ★			
King County Council adoption of Service Guidelines update (anticipated)										Jan 2020 ★			
King County 2021-2022 business planning process Jan 2020–Dec 2020													