KING COUNTY

Signature Report

Motion 15681

Proposed No. 2020-0172.1   **Sponsors** Balducci and Kohl-Welles

1   A MOTION relating to public transportation; approving the

2   Reduced Fare ORCA Card Procurement Locations

3   Implementation Plan submitted in response to the 2019-

4   2020 Biennial Budget Ordinance, Ordinance 18835,

5   Section 109, as amended by Ordinance 18930, Section 75,

6   Proviso P7.

7   WHEREAS, the 2019-2020 Biennial Budget Ordinance, Ordinance 18835,

8   Section 109, as amended by Ordinance 18930, Section 75, Proviso P7, states that

9   $1,000,000 of that appropriation shall not be expended or encumbered until the executive

10 transmits an implementation plan for expanding the number of locations where

11 individuals who qualify for regional reduced fare permit ORCA cards and youth ORCA

12 cards ("reduced fare ORCA cards") can apply for and receive those cards and a motion

13 approving the implementation plan, and a motion approving the implementation plan is

14 passed by the council, and

15   WHEREAS, the implementation plan was to be informed by engagement with:

16 (1) populations that would be eligible for a reduced fare ORCA card, such as youths ages

17 six to eighteen, seniors ages sixty-five and over, and individuals with disabilities; (2)

18 parents of youth, schools, other stakeholders, and members of the public; and (3) King

19 County's Equity and Social Justice Strategic Plan, and

20   WHEREAS, the reduced fare ORCA card procurement location implementation

21 plan shall include, but not be limited to: (1) a description of the types of reduced fare

22 ORCA card procurement locations considered including, but not limited to, libraries,

23 schools, retail locations and buildings where government services are provided such as

24 city halls, evaluation criteria used to assess them, and how flexible delivery through

25 ORCA to Go integrates with this plan; (2) estimated new and existing costs, FTE and

26 contracting needs, and proposed funding sources, including fare revenue impacts, to

27 implement the plan; (3) potential policy changes that would be needed to implement an

28 expansion of Regional Reduced Fare Permit and youth reduced fare ORCA card

29 procurement locations, including policy changes that provide for expanded locations for

30 immediate issuance both of ORCA cards that require photographs and those that do not;

31 (4) a summary of engagement efforts and stakeholder input required by Ordinance 18835,

32 Section 109, as amended by Ordinance 18930, Section 75, Proviso P7, subsection A.1.;

33 (5) how the expansion of reduced fare ORCA card procurement locations would be

34 marketed to eligible populations; (6) how the Metro transit department would partner or

35 seek partners to serve as reduced fare ORCA card procurement locations; (7) a

36 description of populations anticipated to be served at each reduced fare ORCA card

37 procurement location; (8) a map of the potential and proposed reduced fare ORCA card

38 procurement locations; and (9) a schedule for opening the new reduced fare ORCA card

39 procurement locations as early as 2020, and

40   WHEREAS, the Metro transit department, in consultation with the office of

41 equity and social justice and the office of performance, strategy and budget, compiled the

42 required information and the executive has transmitted the reduced fare ORCA card

43   procurement location implementation plan, which is included as Attachment A to this

44   motion;

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

46   The council hereby approves the reduced fare ORCA card procurement

47   location implementation plan, Attachment A to this motion, as required by

48   Ordinance 18835, Section 109, as amended by Ordinance 18930, Section 75,

49   Proviso P7.

50

Motion 15681 was introduced on 6/23/2020 and passed by the Metropolitan King
County Council on 9/29/2020, by the following vote:

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

KING COUNTY COUNCIL
KING COUNTY, WASHINGTON

DocuSigned by:

Claudia Balducci

F8830816F1C4427...

Claudia Balducci, Chair

ATTEST:

DocuSigned by:

Melani Pedroza

8DE1BB375AD3422...

Melani Pedroza, Clerk of the Council

Attachments: A. Reduced Fare ORCA Card Procurement Locations Implementation Plan March 2020

Reduced Fare ORCA Card Procurement Locations Implementation Plan
March 2020

King County

Table of Contents

I. Proviso Text

P7 PROVIDED FURTHER THAT:

Of this appropriation, $1,000,000 shall not be expended or encumbered until the executive transmits an implementation plan for expanding the number of locations where individuals who qualify for regional reduced fare permit ORCA cards and youth ORCA cards ('reduced fare ORCA cards') can apply for and receive those cards and a motion approving the implementation plan, and a motion approving the implementation plan is passed by the council. The motion should reference the subject matter, the proviso's ordinance, ordinance section and proviso number in both the title and body of the motion.

A. The implementation plan shall be informed by:

1. Engagement with: (1) populations that would be eligible for a reduced fare ORCA card, such as youths ages six to eighteen, seniors ages sixty-five and over, and individuals with disabilities; and (2) parents of youth, schools, other stakeholders, and members of the public. The engagement process should solicit input on what are the barriers to immediately accessing the existing reduced fare ORCA cards and suggestions for more accessible and convenient procurement locations and enrollment processes for these ORCA cards. This engagement may be carried out in conjunction with other Metro fares outreach and engagement efforts; and

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

B. The reduced fare ORCA card procurement location implementation plan shall include, but not be limited to:

1. A description of the types of reduced fare ORCA card procurement locations considered including but not limited to libraries, schools, retail locations and buildings where government services are provided such as city halls, evaluation criteria used to assess them, and how flexible delivery through ORCA to Go integrates with this plan;

2. Estimated new and existing costs, FTE and contracting needs, and proposed funding sources, including fare revenue impacts, to implement the plan;

3. Potential policy changes that would be needed to implement an expansion of Regional Reduced Fare Permit and youth reduced fare ORCA card procurement locations, including policy changes that provide for expanded locations for immediate issuance both of ORCA cards that require photographs and those that do not;

4. A summary of engagement efforts and stakeholder input required by subsection A.1 of this proviso;

5. How the expansion of reduced fare ORCA card procurement locations would be marketed to eligible populations;

6. How the Metro transit department would partner or seek partners to serve as reduced fare ORCA card procurement locations;

7. A description of populations anticipated to be served at each reduced fare ORCA card procurement location;

8. A map of the potential and proposed reduced fare ORCA card procurement locations; and

9. A schedule for opening the new reduced fare ORCA card procurement locations as early as 2020.

The executive should file the reduced fare ORCA card procurement location implementation plan and a motion required by this proviso by March 31, 2020 in the form of a paper original and an electronic copy with the clerk of the council, who shall retain the original and provide an electronic copy to all councilmembers, the council chief of staff and the lead staff for the mobility and environment committee, or its successor.[1]

Ordinance 18930, Section 75, Proviso P7 -- Transit, p. 112-114.

---

[1] Link to Ordinance 18930

II. Executive Summary

Transit riders in the Puget Sound region can pay for their trips using cash, paper tickets, the TransitGo mobile ticketing application, or with One Regional Card for All (ORCA) electronic fare payment cards. There are three types of ORCA cards – Regional Reduced Fare Permit (RRFP) cards for senior citizens, RRFP cards for people with disabilities and ORCA Youth cards[2] – that allow transit customers to ride for reduced fares throughout the Puget Sound region, once they prove they qualify for the cards by having certain medical conditions or being above or below a certain age.

In response to Ordinance 18930, Section 75, Proviso 7, this report presents an implementation plan that would increase the number of locations where customers can apply for and receive these three types of reduced fare ORCA cards.

Building on existing innovations in this area, Metro details four potential strategies in this implementation plan:

1) Build a network of verifying agencies to assist with applications and to approve the documentation for these card types;
2) Evaluate opportunities to create a more comprehensive schools program to distribute Youth cards and educate students and staff about how to access and use transit;
3) Expand Metro's Neighborhood Pop-Up program to offer additional mobile outreach and distribution; and
4) Improve customer communications about these fare products, how to apply for them, and how to use them.

Metro currently does not have designated funding for these potential strategies. Funding for these strategies wil be evaluated as part of future supplemental appropriation requests or in the 2021-2022 budget deliberations.

---

[2] The proviso does not address ORCA LIFT cards. For the remainder of this report, "reduced fare ORCA products" should be read as referring to only the three card types that the proviso addresses.

III. Background

This section provides background information on historic and current conditions related to the limited procurement locations for reduced fare ORCA products and the proviso's requirements.

A. Metro Transit Department Overview

Founded in 1973, King County Metro Transit (Metro) is one of the nation's 10 largest transit agencies. Metro provides more than 125 million passenger rides annually on a wide range of services, including approximately 200 bus routes, Dial-a-Ride Transit (DART), the Seattle Streetcars, paratransit service for people with disabilities (Access), a commuter vanpool program, and the King County Water Taxi. The American Public Transportation Association named Metro the Outstanding Public Transportation System of the Year in 2018, recognizing its innovative leadership in mobility services, green practices, and programs for customers with low incomes. Metro has provided a reduced fare for seniors since its first year of operation, and since then has developed an array of discounted-fare programs with the goal of enabling everyone in King County to use public transportation. Metro participates in the One Regional Card for All (ORCA) program which standardizes electronic fare payments throughout the region.

B. ORCA System Overview

One Regional Card for All (ORCA) was launched in 2009 through an agreement between seven transit agencies to standardize electronic fare payments and to facilitate a coordinated system of interagency transfers across the region – thus providing a better customer experience. ORCA allows passengers to board quickly, reducing time at stops.It reduces fare disputes, and it allows Metro to track regional transit activity for effective service planning. Please see Appendix A for the seven agencies in the ORCA system.

There are 17 full-time equivalencies in Metro's Mobility Division's Customer Communications and Services section dedicated to produce regular and reduced fare ORCA cards at the Pass Sales Office and Mail Room at 201 South Jackson Street in downtown Seattle. By interlocal agreement, this team also is regionally funded to handle the mail-in card sales and service requests for the entire region, including Sound Transit, Everett Transit, Community Transit, Pierce Transit, Kitsap Transit and the Washington State Ferries.

Today, about 70% of Metro riders use one of the five types of ORCA cards listed below. There are varying costs, eligibility, and application processes related to each card.

Table 1: Overview of Five Types of ORCA cards

	RRFP for People with Disabilities	RRFP for Seniors	ORCA Youth	ORCA LIFT[3]	Adult ORCA
Eligibility	Proof of temporary or permanent disability status	Proof of 65 years or older	Proof of 6 through 18 years of age	Proof of incomes at or below 200% FPL	N/A
Where card can be obtained					
King Street Center Customer Service Office	✓	✓	✓	✓	✓
Metro Neighborhood Pop Up	✓	✓	✓	☐[4]	✓
Ticket Vending Machines	☐	☐	☐	☐	✓
Retail locations	☐	☐	☐	☐	✓
By phone	☐	☐	☐	☐	✓
By mail	☐	✓	✓	☐	✓
Online	☐	☐	☐[5]	✓[6]	✓
First card fee	No fee	No fee	$5[7]	No fee	$5
Replacement fee	$3	$3	$5	$3	$5
Metro bus fare[8]	$1	$1	$1.50	$1.50	$2.75
Picture required	Yes	No	No	No	No
Registration required	Yes	Yes	No[9]	Yes	No

With current ORCA technology, the first difference between all cards is their Passenger Type. As read by a card reader, the chip on each physical card contains information about the card, in this order:

1. What is the passenger type of this card? (Four options: Adult, LIFT, RRFP, or Youth);
2. Is there a pass product on this card? (Monthly pass, Passport, etc.); and if not
3. How much stored value is in this card's e-purse?

The passenger type is coded onto the card when it is issued by proprietary ORCA hardware called a Customer Service Terminal (CST), and cannot be changed. All ORCA cards default to an Adult Passenger

---

[3] ORCA LIFT cards appear the same as Adult and Youth cards on the front but show card's expiration date on the back.
[4] ORCA LIFT cards can be replaced at Neighborhood Pop Up, but cannot be obtained for the first time or renewed there (unless Public Health is there too).
[5] Youth cards cannot be obtained online for the first time but can be replaced online.
[6] ORCA LIFT cards typically must be obtained in person. There is an online portal for King County college students.
[7] Youth whose parents qualify for ORCA LIFT are eligible to receive Youth cards with the card fee waived.
[8] Access Transportation customers pay $1.75 per trip and can use ORCA pass products through a manual backend process. King County Water Taxi reduced fares are between $2.50 and $4.50, depending on route and fare type.
[9] Only requires to be registered with a youth's date of birth due to privacy reasons.

Type unless they are coded as a different type. The three reduced fare Passenger Types require ORCA agency staff to confirm the passenger's eligibility to assign the new Passenger Type at issuance.

Once an ORCA card with a Passenger Type is issued to a customer, that customer manages the account and adds value to pay for fares. Generally, this means adding value as stored value in an "e-purse" or as a product such as a monthly pass. Managing an account can be done in-person at an ORCA agency storefront such as Metro's Customer Service Office, at a Metro Neighborhood Pop Up event in the community, at an ORCA Ticket Vending Machine, by phone with an agency call center, online, or at one of the 130+ retail locations.

C.   Reduced Fare ORCA Products (RRFP & Youth)

Reduced fare ORCA products provide eligible customers with less expensive access to the transit services of the seven ORCA agencies. These cards require verification of eligibility to acquire, which can result in a more complex process than what customers experience when purchasing a regular adult ORCA card.

To acquire a RRFP or a Youth card, a customer must present a completed application, required payment, and all necessary documentation to Metro staff for review, approval and submission. There are three ways to do this:
1. In person at the Pass Sales Office (in King Street Center, 201 South Jackson Street in downtown Seattle);
2. In person at Metro Neighborhood Pop-Up mobile outreach events; and
3. By mail. In this method, the customer provides copies of any necessary documents along with the application and any required payment. Senior and Youth cards may be purchased by mail, but RRFP Disabilities cards may only be acquired in person because of the photo required by a 16-agency agreement (see below for more information).

Recognizing that mobile outreach was an effective way to expand its sales network, Metro rebranded its ORCA To-Go program as Metro Neighborhood Pop-Up program and expanded the program in 2019 by nearly 50%. Neighborhood Pop-up sales events have successfully reached the eligible populations for these products. In 2019, 87% of the cards sold at these events were RRFP or Youth cards.

D.   Factors to Consider when Expanding Locations

Metro acknowledges there currently are limited options to purchase reduced fare ORCA products. This section explains various factors that must be considered when seeking to provide more locations for these products. This includes the need to appropriately verify eligibility, the technology and staffing challenges related to the ORCA cards' production equipment, and the policy restrictions that result from the two overlapping regional interlocal agreements for ORCA and RRFP.

Documentation Verification and Fraud

Cardholders with reduced fare ORCA cards receive lower transit fares than other riders, so there is an inherent risk of fraud and abuse. Accordingly, staff members at ORCA partner agencies must verify all customers' eligibility for these cards to ensure that no ineligible riders receive these cards. This duty of

consulting appropriate documentation and following specific procedures has not been delegated to any entities outside the ORCA network.

This arrangement contrasts with that of the LIFT partnerships in which partners have the authority to verify eligibility and distribute cards. There are two primary reasons why this is possible. First, the eligibility for LIFT is often confirmed by verifying eligibility through online registries for other government benefits (such as the Supplemental Assistance Nutrition Program). No such central database exists to confirm eligibility for RRFP or Youth cards. The partners then use a common LIFT registry to connect cardholders to the ORCA system. Second, Metro cannot provide and distribute RRFP cards in bulk to partners because the RRFP cards require personal identification information, such as name, photo or expiration date, to be printed on them. This requires a special Customer Service Terminal (CST) specific to the ORCA network. Challenges associated with these CSTs are detailed below.

Technology Required for Current ORCA Card Sales

The current equipment and software used to produce ORCA cards has significant operational challenges as it is now ten years old. Creating new ORCA cards or loading value into the cards requires a Customer Service Terminal (CST). A CST is comprised of a computer with software, a card reader, and a card printer. These units can be stationary, such as those as the Pass Sales Office windows, or they can become mobile units which are transported on carts, such as those used by Neighborhood Pop-Up program. The card readers are no longer made for this version of ORCA software, so they are only bought at great expense or reconstructed from parts. Because of its age, the current hardware can be difficult to use, and staff report that connections to the Internet can be unreliable when the equipment is used in remote locations.

The equipment and software is proprietary and exclusively serviced by Vix Technology, the creator of ORCA. New replacement parts are often difficult to find and sometimes are no longer in production. VIx's support contract ends after 2022 as the region moves to a next generation system.

Staffing and Security Needs for ORCA Card Sales

The sale of ORCA cards involves volumes of cash transactions. This requires adequate security measures as well as senior accounting representatives who must review all transactions and confirm financial activity daily. For instance, when card sales were offered at Westlake Station, an armored car service had to pick up the resulting cash daily. The Pass Sales Office also has bullet-resistant glass and features regular visits from security personnel to maintain a safe environment for staff members and customers. Any additional locations would need to be carefully planned to ensure security.

Regional Agreements (ORCA and RRFP)

Two regional agreements – ORCA and RRFP – also impact this response. Metro is a party to both agreements, but in each case, the relevant decisions are made through consensus among all parties. Seven agencies in the Puget Sound area are party to the ORCA agreement, and 16 agencies throughout western Washington are party to the RRFP agreement. Senior citizens and customers with disabilities may use their RRFP cards as proof of their eligibility for reduced fares across all 16 of the RRFP transit systems. The ORCA and RRFP agencies are listed in Appendix A.

King County would need to work regionally with other agency partners to change either agreement (such as changing the requirement for a photo for the RRFP card for those with disabilities).

E. Ongoing King County Metro Programs

In recognition of the challenges associated with purchasing reduced fare ORCA cards, Metro has three current efforts to improve the customer experience: 1) the development of an online portal to allow electronic card applications; 2) the expansion of the Metro Neighborhood Pop-Up (formerly ORCA To-Go) program in which mobile teams provide ORCA sales, reloading and customer services throughout King County; and 3) participation in the complex, regionally collaborative development of ORCA Next Generation, which will replace the current ORCA system in 2022.

Online Portal

In 2019, Metro began development on a software program that will enable individuals to apply for reduced fare cards online. This program will allow individuals to apply for these cards from any place where they have Internet access. Users will have the capability to upload electronic documentation regarding their eligibility instead of mailing the documentation to King Street Center or presenting it in person.

Per the program's current design specifications, it will also allow users to upload pictures, so customers who are seeking an RRFP Disabilities card will be able to provide all the required information remotely. Metro staff members will then create the cards and mail it to the customers' homes. This will allow customers with disabilities to avoid taking an extra trip to a Metro facility or event.

Metro staff believes that this portal could potentially be popular with youth seeking ORCA Youth cards. Given the timeline of the project and the technology parameters, the portal will not be able to support financial transactions. If Metro allows youth to obtain cards via the portal, it will not be able to collect the youth card fees.

This portal is scheduled to be available in Q4 2020.

The Metro Neighborhood Pop-Up Program

In March 2019, the Westlake Customer Service Center in the downtown bus tunnel closed when Sound Transit assumed operations of the bus tunnel. This made the King Street Center Pass Sales Office the only permanent, in-person site in all of King County for the sale and service of ORCA cards during regular business hours.

Westlake's closure resulted in three customer service terminals available for other uses. These were redeployed in April 2019 as part of an expanded ORCA To-Go program – now called the Metro Neighborhood Pop-Up program – which serves around 30 individual sites every month throughout King County. Typically, two Pass Sales Office representatives use a mobile customer service terminal to support customers' needs for about a two-hour window. Customers who attend these mobile outreach events can conduct most of the same transactions that are available at the Pass Sales Office in downtown Seattle.

The Next Generation of ORCA

Metro is working with the other ORCA agencies to design a replacement and successor to the original 2009 ORCA system. "Next generation ORCA" is expected to launch in 3rd quarter 2021. The new system

will be an account-based system, which will allow funds to be loaded into accounts nearly instantly instead of the current 24-48 hour delay. This change will allow expanded mobile options for fare payment and easier replacement of lost cards or other fare media.

Next gen ORCA will improve the customer experience in other ways as well. Technical capabilities of next gen ORCA and regional policy will enable individuals seeking Senior or Youth cards to order their cards online at the next gen ORCA website, without sending proof of age in by mail or bringing documentation to a Metro location. Instead, customers will be able to upload documentation electronically, which would then be reviewed and approved remotely by Metro staff in the Mail Center, and the appropriate Regional Reduced Fare Permit (RRFP), Senior card or Youth card would then be mailed to the customer.

People with disabilities that need a RRFP Disabled card could apply for a card online through the planned online reduced fare portal, which could be set up to provide information to next gen ORCA either through an export process, or potentially in next gen ORCA phase II through an integrated solution.

Metro predicts that implementation of online ordering of Senior and Youth cards in next gen ORCA and/or the reduced fare online portal would reduce the need for physical locations where people can apply for reduced fare ORCA cards. However, Metro also believes the need for in-person customer service generally will remain because people – particularly in disadvantaged populations, or those who lack easy access to technology – benefit from the ability to get assistance in person.

IV. Research and Strategy Development Methodology

Given the current and historic conditions related to this issue, Metro staff analyzed the requests of the proviso to determine which creative solutions to this challenge could provide clear strategic value to customers in a cost-effective manner. Metro first identified that it and the Council have a common goal of expanding access to reduced fare ORCA products for all qualifying King County residents.

A. Constraints and Opportunities

Before creating a list of potential policy responses to the proviso, Metro staff identified several constraints and opportunities related to the current conditions and the requests in the proviso:

- **Technological Restrictions to Expansion Opportunities**: The production of reduced fare ORCA cards requires the presence of a customer service terminal. Mobile or remote operation of this would require two Metro staff members. This means that new cards can be offered at new sites only if new customer service centers are opened there; this is very expensive, and not enough new cards will be generated to justify the expense. Additionally, the need for in-person transactions may decline after the launch of ORCA Next Generation in 2022 because customers will no longer need coded cards to use their ORCA account (i.e., information on the card type will live in the online account, not on the card).
- **Need for Equity Considerations to Lead Decision-Making**: Locations can be created anywhere in King County. To reach the most people and align with the Equity and Social Justice Strategic Plan, Metro staff recommend that services be provided near the largest populations that are in need of them.
- **Multiple Barriers to Obtaining Reduced-Fare ORCA Products**: Lack of physical access to application locations may not be the only -- or even the greatest -- barrier to the procurement and use of these cards. For example, the application itself and documentation requirements can also be confusing.

On the other hand, Metro agrees that the current procurement locations are challenging for many customers to reach. The proviso's invitation to innovate is an opportunity to generate new ideas. The staff notes the following areas of opportunity in this research:

- **Many Supporters and Partners**: Many other organizations serve people who are eligible for these cards. These partners agree that there is a benefit to expanding access to the cards, and they may be able to assist in the implementation of additional locations.
- **Chance to Address Multiple Barriers**: Other barriers may be addressed if locations are added. Improvements can be made regarding communication about the ORCA card types, the application process, and the cards' use.
- **Improving Technology**: The technology related to ORCA cards and mobility as a service is improving. The staff can leverage these improvements to improve efficiency and enhance the customer experience if locations are added.

B. Potential Opportunities

Realizing these constraints and opportunities, Metro identified the following eight potential strategies to create new locations for procuring RRFP and Youth ORCA cards:

1. Create a new, standalone Metro customer service center that would offer ORCA sales.
2. Co-locate a customer service center for ORCA sales with a Seattle & King County Public Health Center.
3. Delegate ORCA sales to an outside organization and transfer equipment to its custody.
4. Offer a program in collaboration with community organizations to provide application assistance to customers.
5. Create a network of agencies that provide verification for RRFP and Youth cards. *This model is similar to the one in which passport agencies accept documents and process materials on behalf of the US Department of State.*
6. Expand Metro's Neighborhood Pop-Up program.
7. Expand institutional distribution through schools.
8. Expand institutional distribution in other ways.

Given technical and staffing challenges, Metro began this analysis by assessing the value of strategies that would expand *types of locations*, after which data analysis provided further insights and suggestions for appropriate, specific *geographic locations* around the County for these types of new locations. Preferred locations are those which are accessible to those who need services and reach many likely customers. The analysis is explained below.

C. Evaluation Criteria

Each strategy was evaluated against several criteria, namely whether they were feasible, easy for customers to understand and access, equitable according to the ESJ strategic plan and Metro's data analysis, and aligned with input from stakeholder outreach while also being likely to result in significant card distribution.

Feasibility

The first criterion relates to whether the concept is *feasible*. Any new location would require an investment of resources, including staff members to create and support it. Additionally, many innovations require partnerships and cost-sharing to implement. The following questions relate to feasibility:
- **Resource Use**: Would this be an effective use of resources? What is the estimated cost of each additional location?
- **Partnerships**: Can the proposed partner organization work effectively with Metro? Will the training investment pay off? Is there high turnover? Is the staff familiar with document verification for this or other programs? Does the organization and its staff have the capacity to take on new responsibilities regarding card distribution and management? Are there labor considerations to this proposal?
- **Risk Management**: Does this strategy effectively protect sensitive financial, personal and medical data? Can Metro's financial system verify and protect transactions involving all payment types?

High Impact/Ability to Distribute Many Cards

The second criterion is whether the location could generate significant card sales. Metro shares the goal of connecting as many people as possible in King County with the appropriate ORCA card. To assess this, Metro estimated how many cards would be generated at each location, based on past data from similar locations, foot traffic, and ease of travel to the location by car and transit.

Easier Customer Experience

Metro considered the third criterion of whether each potential new location would offer an *easier customer experience*. Is the location easy to access? Will customers understand where it is, or how to use it? Many locations could be created, but certain types are easier access than others. As well, some are easier to communicate to customers than others.

The following questions relate to the customer experience:
- How comfortable would customers be in accessing this location?
- Does the organization protect their privacy while handling sensitive medical, personal and financial information?
- How easy is the communication process for customers?
- Can customers acquire all reduced-fare card types at this location, and are all payment types accepted there?

Alignment with Equity and Social Justice Strategic Plan

The fourth criterion was whether the specific investment would be *equitable*. In developing this response, Metro was guided by King County's Equity and Social Justice Strategic Plan, focusing on "investing upstream where the needs are greatest." All staff members who led engagement and outreach had received training in the Equity and Social Justice Strategic Plan and in the correct implementation approaches, and they advised the team accordingly.

The following questions relate to equity:
- Does this investment occur where needs are greatest?
- Does it take resources from other Metro investments that would more effectively help populations that need assistance?

Spatial Analysis

To determine alignment with the Equity and Social Justice Strategic Plan, Metro did a spatial analysis of both where potential Youth, Senior RRFP and Disabled RRFP cardholders reside, and where existing registered Youth, Senior RRFP, and Disabled RRFP cardholders lived. Metro used American Community Survey (ACS) Data 2017 5-Year estimates to estimate how many individuals, by census tract, were eligible to receive Youth, Senior RRFP, and Disabled RRFP cards. Using this data, Metro used ArcGIS to map out the density[10] of eligible populations (by passenger type) across King County. Metro also used ORCA data to identify where existing registered Youth, Senior RRFP and Disabled RRFP cardholders live.

Using both datasets, analysis was conducted to compare registered card use against eligible population per census tract. Census tracts fell into one of five quintiles for both estimated eligible population density and for density of registered cards. A comparison of the two indicated whether registered cards

---

[10] Measured by # of (youth, Seniors, or people with disabilities) per square mile of each census tract.

for that census were representative or over/under-represented, and to what degree. See Appendix B "Equity Analysis: Utilization Gaps in King County" for map of card over/underrepresentation. Locations that showed more underrepresentation in reduced fare card distribution and locations with a higher 2017 equity score[11] were used to create an initial list of locations to consider for new in-person service centers or for other strategies to increase Youth and RRFP card enrollment.

Once initial locations were selected, additional criteria were examined to identify locations that would have a higher equity outcome. These criteria included: density of households with school-age children, percentage of individuals living at or below 200% of the Federal Poverty Level, percentage of individuals born outside of the United States, number of people with Limited English Proficiency, and if that census tract was identified by the Mobility Framework as an area of greatest need.

Metro also examined census tracts for features that would make it successful location, including access to transit (such as if there is a transit hub and number of bus routes) and foot traffic (determined by number of shops in the area that could attract a lot of customers to the Customer Sales Office).

D. Alignment with Results of Stakeholder Outreach

Finally, strategies were evaluated against whether they aligned with the result of the outreach and engagement conducted for this proviso response. The implementation plan was informed by engagement from October 2019-January 2020 with populations that would be eligible for a reduced fare ORCA card, including youth ages six to eighteen, seniors ages sixty-five and over, and individuals with disabilities; and parents of youth, schools, other stakeholders, and members of the public. The engagement process solicited input on what are the barriers to immediately accessing the existing reduced fare ORCA cards and suggestions for more accessible and convenient procurement locations and enrollment processes for these ORCA cards. This engagement was carried out in conjunction with other Metro fares outreach and engagement efforts.

Description of Outreach/Engagement

As Metro began development of this implementation plan, it sought guidance and input from people who are most directly engaged with the reduced fare products – youth, parents, seniors, people with disabilities, and representatives of organizations that support these individuals.

In-person surveys of groups of youth, seniors, and/or those with disabilities and stakeholder conversations were guided by the following questions.
1. Do you or the people you serve know about and use Metro's reduced fares for youth, seniors, or those with disability?
2. Was getting your card easy or hard? Why?
3. What actions should Metro take to make it easier to obtain a reduced fare card?
4. Are there barriers other than access to physical locations that Metro hasn't considered? What else makes it difficult to use a RRFP ORCA or Youth ORCA?

Qualitative research was conducted with 18 participants, all of whom were current Metro Transit RRFP users and/or caregivers of ORCA Youth card users. These focus groups and in-depth telephone interviews were conducted with the aim of understanding the target groups' access to applying for and

---

[11] The 2017 Equity Score combines the following three demographics into one attribute by census tract: English proficiency, people of color, and household income. Lower scores mean a wealthier, less diverse community and higher scores mean more diverse, less wealthy community.

obtaining Regional Reduced Fare Permits or ORCA Youth cards. Additionally, participants were asked questions about different barriers that might prevent target groups from easily applying for and obtaining a reduced fare ORCA card. Participants also provided recommendations for application or customer service locations.

E. Recommended Strategies

The eight potential strategies in Section IV, part B were analyzed against feasibility, impact, customer experience, equity, and alignment with stakeholder feedback. The results of this assessment are shown below, with the darker the shade equal to a stronger correlation:

Table 2: Analysis of Available Strategies to Expand Reduced Fare ORCA Card Procurement Locations

Strategy	Feasible	High Impact	Easier Customer Experience	Equitable	Aligns with Outreach
Create new, standalone customer service center					
Co-locate a customer service center with a Seattle & King County Public Health Center					
Delegate ORCA sales to an outside organization and transfer equipment to its custody					
Collaborate with community organizations to provide application assistance to customers					
Create a network of agencies that provide verification for RRFP and Youth cards					
Expand Metro's Neighborhood Pop-Up program					
Expand distribution through schools					
Expand distribution through other ways					

Feasibility

The most feasible of the options evaluated were expanding Metro's NPU program, creating a network of verifying agencies, and co-locating a new customer service center in a King County facility because these options represent just an expansion of current operations. The least feasible option is delegating ORCA sales to an outside organization because of the need to receive approval from the seven ORCA agencies to do so as well as the security risks associated with the legacy ORCA machines. Creating a new standalone customer service center also did not score high because of the cost.

<u>High Impact</u>

Strategies that can meet customers where they are greatly reduces the amount of barriers that they might otherwise face in obtaining a reduced fare ORCA card. Expanding distribution through schools is the option with the highest impact, because in addition to bringing cards to where the Youth are, its proposed comprehensive transit education program also provides Youth with the knowledge of how to use their Youth ORCA cards and how to ride transit, helping to develop the next generation of transit riders. The option with the lowest impact is creating a new, a standalone customer service center because it requires customers to go in-person to a physical location during work hours and an additional location does not address issues that many customers might currently face in getting to the existing Customer Service Office at King Street Center.

<u>Customer Experience</u>

Strategy options were evaluated on how simple and streamlined it would be for customers to obtain a reduced fare card. Collaborating with community organizations to provide application assistance to customers and creating a network of agencies that provide verification for RRFP and Youth cards both ranked highly because they provide options to apply for reduced fare cards at locations that customers are already visting and comfortable with, and potentially also closer to them. Expanding distribution through schools and expanding distribution through other ways also ranked highly in terms of customer experience because they significantly reduce the steps required for eligible cardholder to get a card, making it easier for customers to obtain the reduced fare card that is right for them.

<u>Equitable</u>

King County's Equity and Social Justice Strategic plan calls for investments where needs are the greatest. As detailed later in this report in Section V.A, Metro's equity analysis indicates that ORCA reduce fare card use is underrepresented primarily in areas of south King County. Analysis of utilization along with other factors such as equity score, access to transit, and foot traffic highlighted the following areas as the top as the top locations to consider:
- Federal Way
- Kent
- Auburn
- Burien
- Bellevue Crossroads

Therefore, the most equitable approaches are those that can be designed to ensure a focus on the populations in the above areas relative to promoting access to reduced fare cards, namely collaborating with community organizations to provide application assistance to customers, creating a network of agencies that provide verification for RRFP and Youth cards, expanding distribution through schools, and expanding distribution through other ways.

<u>Aligns with Outreach</u>

As detailed later in this report in Section V.D, Metro's outreach and engagement indicated the following major themes:

- Access to physical ORCA enrollment locations is not the only or the greatest barrier. More time is needed to gain a deeper understanding of other barriers these populations may face to ensure an increase in physical locations is successful and helpful.
- The current application processes for reduced fare cards is confusing and should be improved. Application assistance could benefit all audiences, including trained service providers, school staff, etc.
- Metro should go where the community already is, and leverage relationships that already exist between community and organizations to improve this work.
- Improved marketing and education can help reach these specific populations.
- For better access to ORCA Youth cards, the business hours and locations of an enrollment location need to work for working parents and students.
- An online option is needed for added flexibility for families that cannot go to physical locations due to the limited hours and days of operation.

Based on the above feedback, the highest scoring options were those that work with community based organizations and schools to help individuals apply for and access reduced fare cards or that take advantage of areas in the community that populations used anyway to promote access to and improve knowledge of reduced fare cards. Those high scoring options include collaborating with community organizations to provide application assistance to customers, creating a network of agencies that provide verification for RRFP and Youth cards, expanding Metro's Neighborhood Pop-Up program, expanding distribution through schools, and expanding distribution through other ways.

Conclusion

As a result of the assessment against criteria, data analysis, and stakeholder engagement process, the Metro staff recommends the following four strategies for potential implementation:
1. Create a network of agencies to verify RRFP and Youth card eligibility. This model resembles passport agencies, which accept documents and process materials for the US Department of State. Through a two-phase process, Metro combined this idea with a second strategy ("Offer a program, in collaboration with community organizations, to provide application assistance to customers") to better reach the populations with the greatest need where they live. Metro may look to do this regionally with Snohomish and Pierce to mirror other fare programs and to best serve customers who travel throughout the region.
2. Expand school partnerships to include distribution of youth ORCA cards and educating students on how to access and use public transportation. This would be a one-time expenditure in 2021 to evaluate the opportunities of stronger partnerships with schools.
3. Expand Metro's Neighborhood Pop-Up Program.
4. Improve communications to customers about fare products and their use.

These are identified as potential new strategies alongside the ongoing innovations of the Executive Branch to expand access to these cards, as outlined in Section III, Part E, "Ongoing Executive Branch Programs."

The Metro staff do not recommend the following options as they are the least cost effective in reaching many people:

- Create a new, standalone customer service center that would offer ORCA sales.
- Co-locate a customer service center for ORCA sales with a King County Public Health Clinic.
- Delegate ORCA sales to an outside organization and transfer equipment to its custody.
- Expand institutional distribution in other ways.

V. Report Requirements

A. Locations Considered

This implementation plan considered public health clinics, retail locations, buildings where government services are provided such as city halls, libraries, schools, mobile outreach in vans, community organizations, social services agencies, the King County Executive Services Records and Licensing Division office in Kent, community colleges, and King County Department of Local Services office in Snoqualmie. All options assumed the mobile outreach Neighborhood Pop-Up program, formerly known as ORCA To-Go, would continue offering service throughout the county.

Metro worked to ensure that all proposed additional locations would use County resources in an equitable way to reach priority populations and locations where needs are greatest. Metro determined these locations according to where populations live in King County, as well as by identifying areas where card-utilization rates are below expectations, areas where there are high numbers of people with low incomes and/or limited English proficiency, as well as areas with high racial and ethnic diversity. Metro additionally evaluated locations against King County's Equity Score, access to transit, and foot traffic.

After reviewing all the options, Metro is recommending no new physical locations, but instead is recommending efforts be focused on areas highlighted by the spatial analysis as having both low reduced fare card distribution compared to the eligible population and higher proportions of priority populations. As such, Metro is recommending that efforts should be focused primarily in South King County, particularly Federal Way, Kent, Auburn Burien, as well as Bellevue Crossroads.

B. Estimated Costs, FTE and Contracting Needs, and Proposed Funding Sources

The summary of all estimated costs and revenues for the identified strategies are shown below. Specific information about each recommendation is listed later in the document.

Projected Net Program Costs

Net Impact	Y 2019-20	Y 2021-22	Y 2023-24	Y 2025-2026	Total 2021-26
Total Expenses	$1,080K	$1,609K	$1,712K	$1,789K	**$5,110K**
Revenue	$11K	$1,041K	$2,074K	$2,773K	**$5,888K**
Net Costs	**$1,069K**	**$568K**	**-$362K**	**-$984K**	**$-778K**

Capital Expenses (One-Time)

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Verifying Agencies	$897K	-	-	-	-
NPU Expansion	-	$60K	-	-	**$60K**
Total Capitol Expenses	**$897K**	**$60K**	**-**	**-**	**$60K**

Operating Expenses (Ongoing)

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Verifying Agencies	-	$653K	$776K	$812K	**$2,241K**
Schools Program	-	$394K	$406K	$419K	**$1,219K**
NPU Expansion	$183K	$402K	$426K	$450K	**$1,278K**
Improved Communications	-	$100K	$104K	$108K	**$312K**
Total Operating Expenses	**$183K**	**$1,549K**	**$1,712K**	**$1,789K**	**$5,050K**

Revenue Details

Revenue Impact	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Projected Revenue	$11K	$1,041K	$2,074K	$2,773K	$5,888K

C. Potential Policy Changes

Several policy changes could enable broader distribution of these cards or easier communication to customers of how to procure and use them.

1. Subsidize fees for ORCA Youth cards or work regionally through ORCA to eliminate fees. Alternatively, align fees with those of RRFPs to allow first cards to be issued without charge and replacement cards to cost $3.00. The need to charge a fee for the card restricts how the cards can be distributed and complicates the transaction significantly. For example, the online application portal, scheduled to launch in 2020, will not be able to accept payment for the Youth cards. When the costs have been subsidized, Metro has been able to distribute Youth cards quickly. Youth often don't have much money in their control, so requirements to charge card

fees for Youth cards make Youth cards are more challenging to distribute and less appealing for Youth to seek and use.

2. Work regionally to revisit or remove requirement for picture on Disability RRFP card.

Due to technical limitations of current ORCA equipment, only a new full Customer Service Center staffed by Metro staff or the deployment of ORCA Next Generation will expand the number of physical locations at which ORCA cards can be immediately issued.

D. Engagement Activities

Metro conducted engagement for this proviso from October 2019-January 2020 with populations that would be eligible for a reduced fare ORCA card, including youths ages six to eighteen, seniors ages sixty-five and over, and individuals with disabilities; and parents of youth, schools, other stakeholders, and members of the public. The engagement process solicited input on what are the barriers to immediately accessing the existing reduced fare ORCA cards and suggestions for more accessible and convenient procurement locations and enrollment processes for these ORCA cards. This engagement was carried out in conjunction with other Metro fares outreach and engagement efforts. Activities included community meetings, an online survey distributed through social media, individual interviews and a focus group.

Major Themes/Takeaways

- Access to physical ORCA enrollment locations is not the only or the greatest barrier. More time is needed to gain a deeper understanding of other barriers these populations may face to ensure an increase in physical locations is successful and helpful.
- The current application processes for reduced fare cards is confusing and should be improved. Application assistance could benefit all audiences, including trained service providers, school staff, etc.
- Metro should go where the community already is, and leverage relationships that already exist between community and organizations to improve this work.
- Improved marketing and education can help reach these specific populations.
- For better access to ORCA Youth cards, the business hours and locations of an enrollment location need to work for working parents and students.
- An online option is needed for added flexibility for families that cannot go to physical locations due to the limited hours and days of operation.

Outreach/Engagement by Group

Participants expressed frustration with obtaining the ORCA Youth card and Disability RRFP for reasons regarding both location/logistics and application process/communication. Cultivating a more robust outreach and ORCA RRFP communications campaign, expanding physical locations, improving the application process and form, pursuing schools distribution for ORCA Youth cards, and having an online application portal were all popular solutions to identified barriers. Several participants expressed the need for a diversity of solutions because the ability to access different locations physical or online will be different from population to population and person to person.

The section below summarizes findings for each audience identified in the proviso.

Youth (30 youth; 3 staff who serve about 50-75 youth)
Metro participated in a conversation with staff members at the Burien Community Center to discuss access to ORCA and transit for youth and seniors. Metro also conducted a brief survey with youth at the Vietnamese Friendship Association homework help program at the Seattle World School. .)

Results/Key Themes:
- Some youth have no funds to load onto a Youth card.
- Business hours and days of operation of Neighborhood Pop Up program should be extended because students can't leave school.
- Onsite distribution at schools would be effective because this is where the youth are.
- There is a need for improved bus service for students who don't qualify for the school bus.
- The process for getting ORCA and using it is a barrier for families who speak limited English.
- Overall, lack of awareness of ORCA and transit services is a barrier.

Seniors (3 agency staff, who served as proxies because their organizations serve seniors; 11 focus group participants)
Metro met with staff at Hopelink, a social service and transportation provider, the senior programs coordinator at the Burien Community Center, and the program coordinator at the University District Food Bank. Feedback for this audience was prioritized less than that from youth and people with disabilities because seniors generally have more options to procure a card. They also tend to have more flexible schedules, which makes options like Neighborhood Pop-Up easier for them to use.

Results/Key Themes:
- Libraries and community centers are convenient enrollment/distribution locations for seniors, who already use other services at those locations and are often familiar with the staff.
- Neighborhood Pop Up staff could provide more value by sharing information about other Metro services and reduced fare programs.
- Neighborhood Pop Ups at community centers are helpful for seniors since they are already there.
- The RRFP application is confusing and cumbersome, and seniors require assistance from social service provider staff members. The RRFP application should be separated into two applications – one for seniors, and one for people with disabilities.

People w/ disabilities (56 consulted and 3 focus group participants)
Metro conducted a brief survey and discussion with members of the King County Mobility Coalition, an advisory board of King County Metro, which facilitates the coordination of King County special needs transportation options. This includes special needs transportation providers, clients and funders of services, and interested governments, non-profit partners, and for-profit partners from rural and urban areas of King County. Metro also had an extended stakeholder conversation with Hopelink's Mobility Coalition coordinators. Finally, a focus group and individual interviews were held in January which included three people with disabilities.

Results/Key Themes:
- Community centers, senior centers and libraries are the best enrollment/distribution locations for people with disabilities

- The RRFP application is confusing. The RRFP application should be separated into two applications – one for seniors, and one for people with disabilities. The application is cumbersome and seniors require assistance from social service provider staff members.

Parents/Caregivers (116 consulted)
Metro conducted a brief parent survey promoted through Metro's social media channels including Nextdoor, Facebook and Twitter and through paid advertising on Facebook. The ads ran from Jan. 4 to Jan. 13 in both English and Spanish. Overall, 83 participants took the online survey.

Metro also spoke with parents at the Vietnamese Friendship Association, at a Spanish-speaking family English class, and a job readiness class with Vietnamese-speaking parents.

Results/Key Themes:
- Greater education/awareness of how to use transit services and ORCA is needed, especially for families with limited-English proficiency and recently resettled refugees. In-person training is preferred. Parents, especially those with limited-English proficiency and recently resettled refugees, need more education/information about transit services.
- The business hours of the downtown Seattle location, and the fact it is only open on weekdays, do not work for working families. Any physical location would need greater flexibility with extended hours and weekends to accommodate working parents.
- Parents - mainly surveyed parents - want an option to apply for youth cards online. They also wanted to be able to scan documents, to use student IDs as proof of age and greater clarity about what constitutes "proof of age." Mail-in application option works, but only if you have stamps and a printer.
- There were concerns about affordability of transit fares. Some believe that customers, especially youth, should not pay for public transit. Some thought that some families may not have enough income to load money onto an ORCA card.
- Some parents expressed safety concerns associated with their children riding the bus.

School district/provider staff (6 staff members consulted):
Metro met with school district staff who coordinate the following services in their districts: family engagement, McKinney Vento (homelessness) services, and student support services. School district staff were from from North Shore School District, Bellevue School District, Kent School District Support Services, Lake Washington School District and Tukwila School District, as well as one staff member from Treehouse for Kids, a foster care youth service provider.

Results/Key Themes:
- There is a value for youth to have ORCA cards.
  - Students, especially those experiencing homelessness or who have low-incomes, often forgo opportunities for after school clubs, jobs, sports or other programs because they don't have reliable transportation to and from those activities.
  - Summer use of ORCA cards can be very beneficial for students, supporting access to explore opportunities for growth during the summer like clubs, sports, and other activities.
  - There were concerns the age limit of ORCA Youth cards was too low. Age limit to 18 leaves out a lot of students who are still in the public school system until they are 21.
- Schools are the most convenient access point.

- o Distributing cards at school would be challenging for schools to manage given current workload. There should be a dedicated staff person at schools or the district to manage card registration; some school staff may not have capacity to do this type of work even with training.
        - o Foster youth could benefit from a dedicated person that manages their card if it's received through school; they often switch schools.
- Students often have little money, but students need funds to load and use an ORCA card.
        - o Youth often only have cash, so they must be educated on how and where to reload their cards with cash. There is a need for more physical locations where students can add cash, and these locations need to be well-publicized.
        - o There was a suggestion to have an app for reloading money onto cards and online training in multiple languages.
- There is a need for more, multi-lingual education and awareness of transit options among parents and youth.
        - o Language barriers still prevent families from learning how to use transportation and how to obtain/reload ORCA cards using the internet or other methods.
        - o Students need to know about transit options and how to use them. Some may need incentives.
- The application is confusing. It should be for youth cards only.

EMC Research - Focus Group

Metro contracted with EMC Research to conduct additional research using focus groups to understand needs, barriers, preferred service locations and service providers for those eligible for RRFP and Youth ORCA cards. Please see Appendix C – "EMC Research Report on Focus Groups" for the full report.

E. Expansion Marketing

Each strategy would be marketed in a different way, which is specified in its implementation plan. Methods include marketing new locations through partners, social media, and information on the Metro website.

Strategy	Additional Funding Requested	Materials/Strategy Collaborators	Targeted Audience
Network of Verifying Agencies	$156K (2021-2026)	Customers Enrollment agencies	Youth Seniors People with disabilities People with low incomes
School Distribution	None at this time	Students Caregivers School staff Other stakeholders	Schools with highest percentages of Free and Reduced School Lunch Program
Expand Metro's Neighborhood Pop-Up	None at this time	Community partners	NPU host site community members General marketing
Improved Communications	None at this time	None at this time	General marketing

Please see Section VI "Implementation Plan for Recommended Strategies" for more information.

F. Potential Partners/Partnerships

Each strategy includes a method for seeking partners. As all programs are new, Metro would need to seek partners for each for the programs to be successful. As funding is limited, Metro transit department would partner and seek partners to serve as locations by finding those to whom this program is of mutual benefit.

Strategy	Additional Funding Requested	Potential Partners/Partnerships
Network of Verifying Agencies	$855K (2021-2026)	Phase 1: Harborview DSHS Seattle & King County Public Health Phase 2: Senior centers Youth centers Community centers Libraries
School Distribution	None at this time	School districts
Expand Metro's Neighborhood Pop-Up	None	Hopelink Neighborhood Pop-Up host partners
Improved Communications	None	ORCA agency partners

Please see Section VI "Implementation Plan for Recommended Strategies" for more information.

G. Populations Anticipated To Be Served at Each Location

Strategy	Primary Populations to be Served
Network of Verifying Agencies	Youth Seniors People with disabilities People with low incomes
School Distribution	Youth
Expand Metro's Neighborhood Pop-Up	Youth Seniors People with disabilities People with low incomes
Improved Communications	General population

Please see Section VI "Implementation Plan for Recommended Strategies" for more information.

H. Map of the Potential Locations

A map is included in each strategy's implementation plan.

I. Potential Schedule for Opening the New Reduced Fare ORCA Card Procurement locations

Strategy	Potential Schedule for Opening New Locations
Network of Verifying Agencies	Portal ready in 2020 Bring in partners 2021
School Distribution	Start of 2021-2022 school year
Expand Metro's Neighborhood Pop-Up	2021-2022
Improved Communications	2021-2022

Please see Section VI "Implementation Plan for Recommended Strategies" for more information.

VI. Implementation Plan for Recommended Potential Strategies

Below are the implementation plans for the identified potential strategies to expand procurement locations.

A. Create a Network of ORCA Verifying Agencies

The first potential strategy is to open a network of "verifying agencies" to help individuals apply for reduced-fare ORCA products throughout the County. This model was inspired by the successful model of passport offices for the U.S. Department of State. In communities, the U.S. Department of State – Consular Affairs Bureau delegates authority to public institutions like post offices and City Halls to review documents and accept materials on the Departments' behalf for greater customer convenience.

Staff at the verifying agencies would be able to accept an individual's reduced fare ORCA card applications and help verify their eligibility. This strategy leverages incoming technology improvements and successful partnerships from the LIFT distribution model to create new locations. This responds to the feedback from the engagement process that people wanted to apply for these cards in locations throughout the County which are open during regular business hours, and that application assistance for these fare products would be beneficial.

Description

The current limited number of ways and places that individuals can obtain a reduced fare ORCA card places an unfair burden on some of the most vulnerable populations in King County, especially those with disabilities who can only apply at the Pass Sales Office at King Street Center or at a Neighborhood Pop-Up event.

In this strategy, Metro would leverage the new online portal to substantially increase accessibility and registration of Metro's reduced fare programs and advance King County's Equity and Social Justice (ESJ) goals. A network of verifying agencies, rolled out in a phased approach, would help individuals use the online portal and help confirm eligibility. Metro would then fulfil the orders and mail the appropriate card within the week.

In Phase 1, the network would include 28 locations with Harborview Medical Center, Department of Social and Health Services (DSHS), and Seattle & King County Public Health. These agencies are experienced in verifying eligibility for several programs, including the LIFT program, and serve customers eligible for reduced fares.

In Phase 2, Metro would expand the number of participating agencies and locations. Metro would make efforts to partner specifically with senior centers, community centers, youth centers and libraries, as well as open opportunities for other interested agencies.

Estimated Program Costs and Revenues

The estimate for creating and maintaining the online portal and the associated verifying agencies network using through the end of 2026 is estimated at $2,241,000. This includes already budgeted capital funds for the online portal.

The program would require hiring a Project/Program Manager. Increased demand either in the mail room or to manage agencies could result in a request for additional staffing. If this happens, Metro will request funding from Council at that time.

Revenue assumptions are based on purchasing trends observed in Neighborhood Pop-Up sales. Specifically, roughly half of cards issued are to new customers, roughly half of those new customers might add $20 one time to their E-Purse, and only a small percentage of new customers would purchase a monthly pass periodically (roughly every other month). Revenue estimates also include attrition each year and include costs to subsidize card fees returning to Metro in the form of revenue. See "Potential Policy Changes" below for more information.

Program Net Costs

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Expenses	$897K	$653K	$776K	$812K	**$2,241K**
Revenue	-	$270K	$620K	$900K	**$1,790K**
Net costs	**$897K**	**$383K**	**$156K**	**$88K**	**$451K**

Capital Expense (One-Time)

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Portal creation	$897K	-	-	-	**$897K**

Operating Expenses (Ongoing)

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Wages & benefits (1.0 FTE)	-	$275K	$292K	$309K	**$876K**
Portal maintenance and Licenses	-	$34K	$35K	$36K	**$105K**
Marketing	-	$50K	$52K	$54K	**$156K**
Card stock	-	$40K	$54K	$56K	**$150K**
Card fees	-	$22K	$30K	$31K	**$83K**
Materials & travel	-	$5K	$5K	$6K	**$16K**
Agency reimbursements	-	$227K	$308K	$320K	**$855K**
Total operating expenses	**-**	**$653K**	**$776K**	**$812K**	**$2,241K**

Revenue Details

Revenue Impact	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Projected Revenue	-	$270K	$620K	$900K	**$1,790K**

Potential Policy Changes

Metro would propose to subsidize the card fee in this strategy. Due to constraints in the online portal system, collecting fees for new and renewal cards would require Metro to create a separate process for collecting and processing payment, which would create additional barriers and burdens for customers and negatively impact their customer experience. Additionally, the staffing costs required to set up a process to collect card fee payment would be greater than the card fees that would be collected.

By subsidizing the card fee, Metro could ease the enrollment process for clients, show the true cost of the program, and proceed without needing to obtain approval from the rest of the ORCA transit agencies. A portion of card fees would return to Metro in the form of revenue as card fees are split up between the ORCA transit agencies.

Another option is to waive the card fee, where neither customers nor any transit agencies are responsible for collecting nor paying card fees.[12] Waiving the card fee would require regional approval from the other ORCA transit agencies and could potentially delay program rollout.

Engagement

Metro received input for this strategy through consultation with youth, seniors, people with disabilities, caretakers, parents, and schools. Through the engagement process, Metro heard feedback that people wanted to apply for these cards in locations throughout the County which are open during regular business hours, and that application assistance for these fare products would be beneficial. Please see the engagement process summary in Section V, Part D "Engagement Activities" for more information.

Marketing

Metro would engage customers and enrollment partners to create materials that are available in multiple languages, easy to read, and culturally appropriate. Metro would work with partners to trans-create marketing materials into King County's tier 1 and tier 2 languages. Marketing efforts would be targeted mostly in spaces where large concentrations of populations eligible for reduced fares frequent or reside in but would also be marketed broadly. Metro anticipates using several different types of communications tools and strategies; the materials would use simple language and images to describe the program and locations where customers can apply for reduced fare cards.

Partnerships

For Phase 1, Metro would launch this network with Harborview Medical Center, eight Public Health locations and all 17 DSHS offices that currently enroll customers in ORCA LIFT.[13] A map of these locations is shown below, and the addresses of these locations are shown in Appendix D. These locations were

---

[12] Current reduced fare card fees: $5 for new Youth cards and $0 for new LIFT or RRFP cards; $5 to replace Youth cards and $3 to replace LIFT or RRFP cards.

[13] Public Health locations chosen by Public Health as locations most ready to become a verifying agency at launch of the online portal.

determined in consultation with partners and were chosen because staff at each of the three agency types have experience with verifying information and distributing LIFT cards. Harborview currently verifies customers for Disabled RRFP eligibility and can also verify the age requirements for Senior and Youth reduced fare programs. DSHS and Public Health are currently verifying identity for their health and human service programs, as well as for LIFT eligibility, and would be able to extend verification services for other reduced fare programs.

For Phase 2 partnerships, Metro proposes to reach out to senior centers, municipalities, community centers, libraries and youth centers as well as solicit an open call for partners. There are two ways that agencies can be partners in Phase 2:

1. **Becoming a verifying agency**. In this model, new agencies would take on a role like partners in Phase 1. Enrollment agencies would be held responsible for accurately verifying a customer's eligibility for a Youth, Senior or Disabled RRFP card. Verifying agencies would sign off that a customer is eligible for the reduced fare program; no additional proof of eligibility would be required for upload to the portal.
2. **Conduct application assistance electronically**. Agencies could fill out the application via the online portal on behalf of customers that might be having difficulties completing the paper application. In this model, agencies would not be verifying eligibility, and would have to upload verifying documents to prove a customer's eligibility in the reduced fare program. Employees at Metro would verify the documents for eligibility before proceeding with issuing the reduced fare card.

To manage risk of fraud and maintain the integrity of the reduced fare programs, Metro would work with each agency to determine which partnership option is a better fit based on factors such as experience verifying eligibility, turnover, internal capacity, and type of agency operations. For organizations that are unable to or do not to be a verifying agency, application assistance would provide an easier and more accessible way for agencies to support their clients.

Regardless of which type of partnership agreement an agency decides to enter with Metro, agencies and Metro would work in partnership to establish participation guidelines.

Individuals Served by the Program

This project would reduce barriers for youth, seniors, people with disabilities, and people with low incomes to getting reduced fare ORCA products. This approach would also better serve customers who might otherwise face technological or other difficulties in submitting an online application for themselves.

Each type of verifying agency would likely primarily serve specific populations. For example, Harborview Medical Center currently serves people with disabilities as the sole evaluator for eligibility in Access Transportation, Metro's ADA Paratransit program. As such, Harborview would likely primarily reach people with disabilities and seniors. LIFT agencies would continue to primarily serve people with low incomes but may also serve youth and seniors. DSHS locations would serve a variety of customers, including seniors, people with disabilities, and people with low incomes.

Map of New Locations

A map of locations for this program can be found below. Appendix D includes the addresses and facility types of all locations.

Proposed Startup Year Enrollment Locations

Source: U.S. Census Bureau 2013-2017 ACS 5-Year Estimates
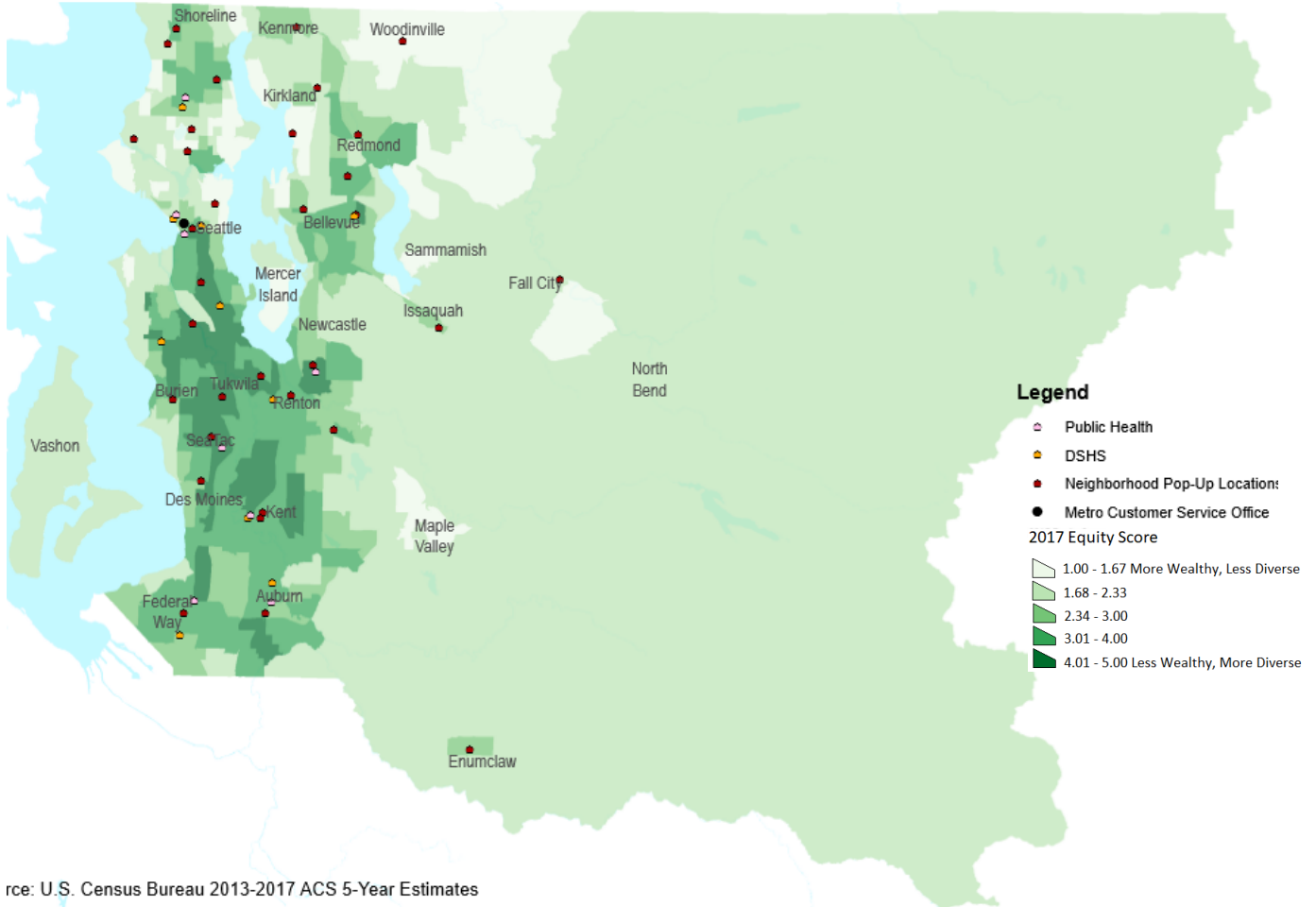
Schedule

Metro is currently implementing a capital project to produce the online portal. This is scheduled to be ready for customer use in late 2020. Metro would test this concept in 2020 and fully implement in 2021 if funding is provided in the 2021-2022 budget.

Phase 1 – 2020
Metro anticipates that agencies would start serving customers using the online portal by late 2020. During this phase, startup agencies would help Metro refine the enrollment process, work out bugs in the portal, and conduct outreach for agencies that would participate in Phase 2.

Phase 2 – 2021

In Phase 2, Metro would be able to roll out additional agency verification locations as well as new electronic assistance partners. Metro plans to have additional agency verification locations by end of Quarter 2 of 2021. Metro would continue to add agencies as verifying agencies or electronic assistance partners on a quarterly basis through 2022. Once enrollment of additional agencies slows down, Metro would add agencies on a rolling basis.

Next Generation ORCA - 2022

The online portal will continue to operate alongside Next Generation ORCA that will be launched in 2022. Next Generation ORCA will have technological updates that might enhance back-end processes of the online portal but will not replace the online portal.

B. Develop a Program to Expand Distribution through Schools

Feedback from teenagers and parents revealed that it would be most convenient if more ORCA cards were available in schools. This approach could also include transit education within the school environment to help the region grow the next generation of transit riders.

Description

In this strategy, Metro would work with school districts in King County to build a comprehensive approach to distribute more ORCA cards through schools. The goal would be to 1) provide youth cards to every student who wanted one and 2) launch a comprehensive transit education program. Metro would build on lessons learned from past and current programs, and potentially incentivize card uptake by including a small number of trips or card value on each card.

As a first step, Metro would work to identify the resources needed to ensure effective program delivery, potential fare subsidy or foregone revenue needed to support this program, and a roll-out strategy prioritizing delivery over time to the highest-need schools and districts. This program development work would inform a future supplemental budget request.

This strategy would build on Metro's current efforts:

> **Passport Program.** There are nearly 300,000 public school students in King County. Metro currently works with the school districts to offer either schoolyear or annual transit passes through its Passport program. About 18,000 of these students receive school-year transit passes, and 9,000 receive annual passes. School districts generally participate in this program if Metro service offers a robust and cost-effective transportation alternative to standard "yellow bus services" for those students who do not live close enough to school to walk. School districts are reimbursed by the State for the cost of either passes or yellow bus service. See the map further down in section "Map"for a map of King County school districts and Appendix E for a list of Metro's school contracts for the 2019-2020 school year.

> **State-funded pilots.** In the past two years, Metro also has partnered with school districts to explore and pilot regional distribution of preloaded Youth ORCA cards and a Summer ORCA Pass Pilot:

- Youth ORCA E-Purse $10 regional distribution: King County Metro contracted with Hopelink to execute a Washington state Youth ORCA Transit Coordination grant to distribute $10 pre-loaded Youth ORCA cards and transit education materials to teenagers in King County. About 6,000 Youth cards were distributed through school districts, high schools, youth-serving organizations, and individual requests generated through a targeted marketing campaign. Of the 6,000 cards distributed roughly 54% were used on transit on nearly 50,000 trips and 11% were reloaded with funds, for a nearly of $37,000 loaded for additional trips.
- Summer Youth ORCA Pass Pilot: A Washington state budget proviso funded a 3 -year Summer ORCA Program to distribute unlimited regional ORCA passes to income-qualified high school students in three school districts for three summers. The program distributed an average of 1,500 cards to 8th - 12th grade students qualified for free or reduced-price lunch across 32 schools. Participants record an average of 73,000 trips over the summer, for an average of 16 trips per month per student. The fare cost is about $56 per participant over the summer and the pilot is being evaluated for expansion in 2021.
- Both programs received a positive response from students, parents, and school districts.

Estimated Program Costs and Revenues

One FTE for a Transportation Planner or Project/Program Manager would planner would lead efforts to work with school districts to develop a potential program, including developing and distributing marketing materials, conducting outreach to schools and districts, and tracking distribution and use of cards. Support Services & Materials includes funding for additional outreach and program development work, draft materials design, and costs of the cards themselves. Projected revenue is based on a conservative assumption that half of all cards issued reload $20 one time per year.

Projected Net Program Costs

Net Impact	Y 2019-20	Y 2021-22	Y 2023-24	Y 2025-2026	Total 2021-26
Expenses	-	$ 394K	$ 406K	$ 419K	$ 1,219K
Revenue	-	$ 563K	$ 938K	$ 1,125K	$ 2,626K
Net Costs	-	**$ (169K)**	**$ (532K)**	**$ (706K)**	**$ (1,407K)**

Operating Expenses

Expanded School Distribution	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Wages & Benefits (1.0 FTE)	-	$ 244K	$ 251K	$ 259K	**$ 754K**
Support Services & Materials	-	$ 150K	$ 155K	$ 160K	**$ 465K**
Total Expenses	-	**$ 394K**	**$ 406K**	**$ 419K**	**$ 1,219K**

Revenue Details

Revenue Impact	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Projected Revenue	-	$ 563K	$ 938K	$ 1,125K	$ 2,626K

Ongoing funding for a program would be requested in the 2021-2022 budget or a supplemental budget request. Metro would estimate projected revenues as part of the program development.

Potential Policy Changes

No policy changes would be required for program development. However, Metro might learn more about policy changes which could increase card uptake and usage through the program development process, including maintaining or eliminating the current $5 card fee.

Engagement

Metro received input for this strategy through the proviso engagement process, including consultation with youth, parents, and contacts at school districts. Please see the engagement process summary in section IV, part D for more information.

Marketing

No marketing would be conducted in the program development phase; however, additional outreach and engagement with students, parents and caregivers, school staff, and other stakeholders would inform the development of a marketing strategy that would be conducted as part of program implementation. All marketing for school distribution programs would focus on districts and schools that have the highest percentages of students in free and reduced lunch programs.

Partnerships

School districts would be essential partners to both program design and program implementation. Large scale card distribution, as experienced in Seattle's ORCA Opportunity program, places significant burden on school-based administrators. Seattle's program seeks to address that burden through hiring a contractor to work within the school district. With resources for program development, Metro would engage the school districts and site administrators and develop a program together that can work for all.

Individuals Served

There are nearly 300,000 public school youth in King County. The program development phase would identify which districts and school ages should be prioritized for implementation, assess likely uptake rates, and compile additional information that would inform Metro's understanding of the population who could be served by full program implementation. Appendix F shows current demographic information by district.

Map

A map of school districts in King County is included below.

King County School District Boundaries

Source: U.S. Census Bureau 2013-2017 ACS 5-Year Estimates
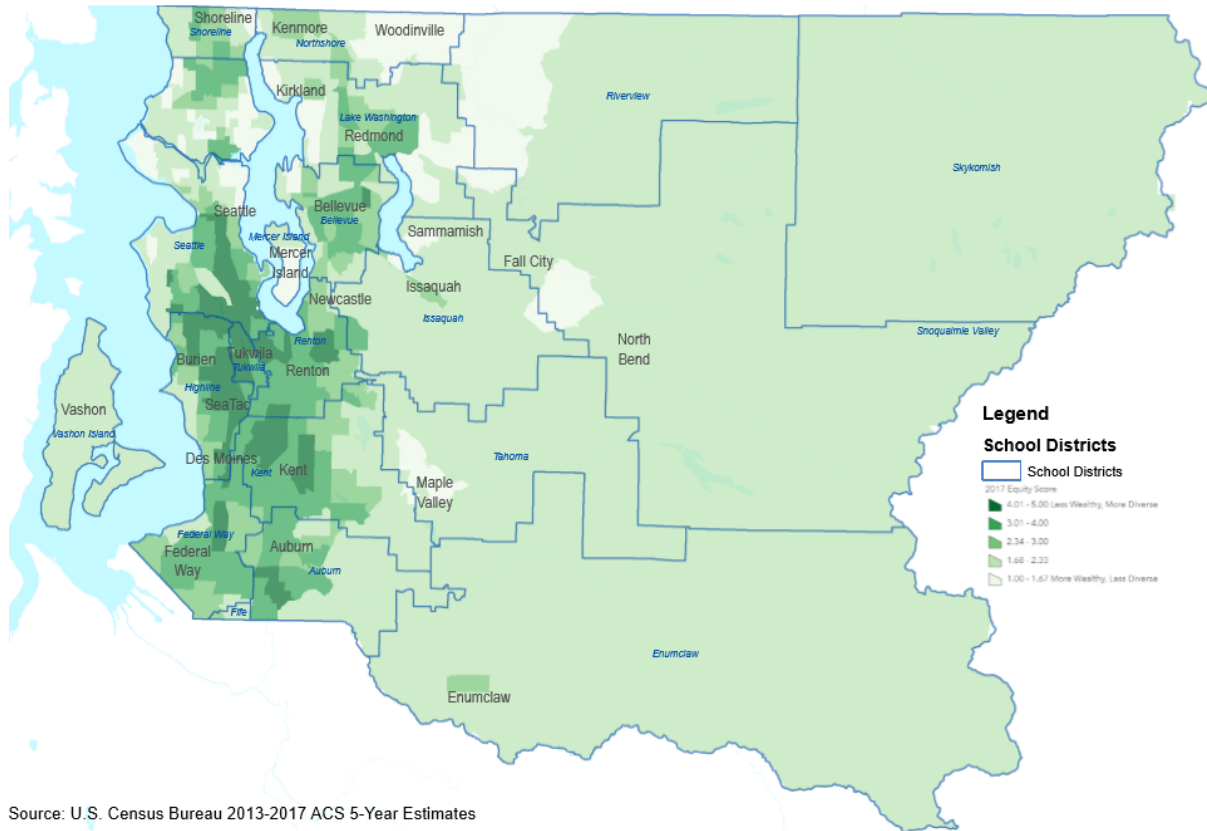
Schedule

Metro is anticipating program development to take six months after receipt of funding. Ideally, program implementation could be planned to begin with the 2021-2022 school year.

C. Expand Metro's Neighborhood Pop-Up Program

The third potential strategy is to expand Metro's Neighborhood Pop-Up Program, so people can obtain any type of ORCA product right in their community. An expansion of one team would provide additional capacity to flexibly deploy resources throughout King County, allowing additional outreach, expanded educational opportunities, and broader access to Metro customer service and support. This strategy is in direct response to the feedback from the engagement process: People want to apply for ORCA cards in locations they already visit such as libraries, community centers, and senior centers. It also responds to feedback that customers would like to purchase a variety of Metro cards and products in their own communities.

This expansion also could improve the customer experience during the transition to ORCA Next Generation. Having a network of established locations where customers can reliably find Metro help and ORCA sales would ease this significant service transition.

Description

New locations for Metro Neighborhood Pop-Ups would be chosen using a variety of factors. Locations must be publicly accessible, safe and protected from the elements. Metro looks for places where the public would be going to for other services and asked for input from other groups who work with the public, including public health. In expanding the program and setting up regular events in 2019, Metro worked to evenly distribute recurring events throughout King County with prioritization of areas with high Equity Scores and locations that support other King County efforts such as the Burien Community Court. Finally, Metro prioritized locations near transit.

The more than 30 regular current locations receive monthly or bi-monthly visits. The locations include courts, city halls, senior centers, hospitals, community colleges, libraries, public health clinics, and non-profit organizations. The map of current locations is shown below, and the full list of all locations with addresses and facility types is shown in Appendix G.

Current Neighborhood Pop-Up Locations

Source: U.S. Census Bureau 2013-2017 ACS 5-Year Estimates
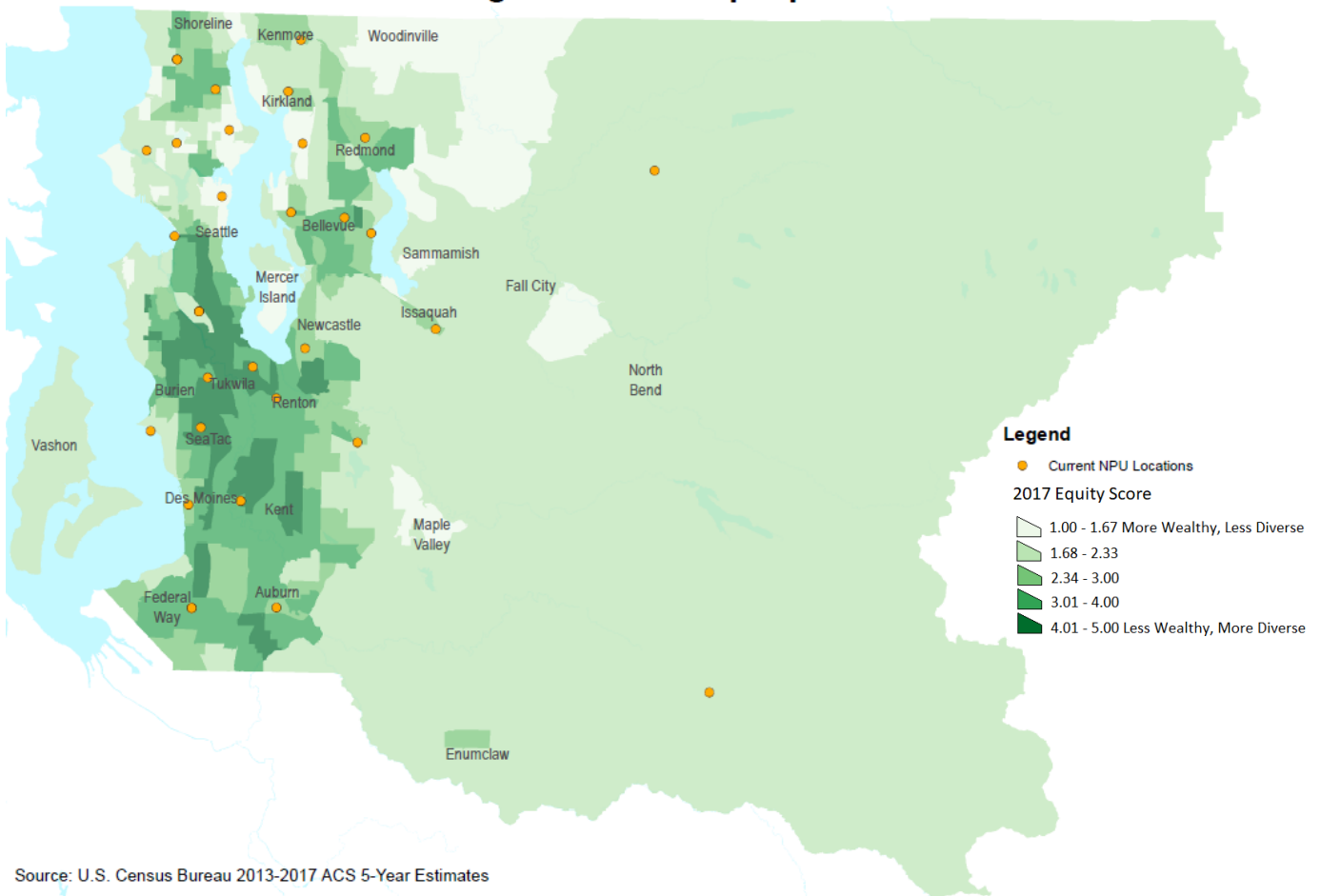
Future locations would be chosen using the same factors and a continued focus on bringing these services to priority populations and in locations where the needs are greatest. A conceptual map of new locations can be found in the section "Map of New Locations" below.

The strategy to expand the Neighborhood Pop-Up program is reinforced by the positive feedback Metro currently receives. Examples of this feedback can be found in Appendix H.

Estimated Program Costs and Revenues

Additional FTEs would be required to staff additional Neighborhood Pop-Up teams to establish new locations at regularly scheduled intervals. Revenue projections are based on the trends seen thus far in the set schedule program. Specifically, roughly half of cards issued are to new customers, roughly half of those new customers might add $20 one time to their E-Purse, and only a small percentage of new customers would purchase a monthly pass periodically (roughly every other month). Revenue estimates also include attrition each year.

Projected Net Program Costs

Net Impact	Y 2019-20	Y 2021-22	Y 2023-24	Y 2025-2026	Total 2021-26
Expenses	$183K	$462K	$426K	$450K	**$1,338K**
Revenue	$11K	$208K	$516K	$748K	**$1,483K**
Net Costs	**$172K**	**$254K**	**-$90K**	**-$298K**	**-$145K**

Capital Expenses (One-Time)

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Van Purchase and Configuration	-	$60K	-	-	**$60K**

Operating Expenses (Ongoing)

Estimated Expenses	Y 2019-20	Y 2021-22	Y 2023-24	Y 2025-2026	Total 2021-26
Wages & Benefits (2.0 FTEs)	$183K	$394K	$418K	$442K	**$1,254K**
Van Operating Costs	-	$3K	$3K	$3K	**$9K**
Materials & Software License	-	$5K	$5K	$5K	**$15K**
Total Operating Expenses	**$183K**	**$402K**	**$426K**	**$450K**	**$1,278K**

Revenue Details

Revenue Impact	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Projected Revenue	$11K	$208K	$516K	$748K	**$1,483K**

Potential Policy Changes

Metro does not anticipate policy changes needed to expand the Neighborhood Pop-Up program.

Marketing

The expansion of Neighborhood Pop-Up would be marketed in a variety of ways:

- Supporting partner locations by providing marketing information for them to use through their own networks and communications tools.
- Conducting Metro-sponsored outreach to communities, including social media, email outreach and signage.
- Providing information to community partners, such as Hopelink, who would then distribute to their networks.

Partnerships

The Neighborhood Pop-Up programs relies on having a network of partners who serve as "hosts."

Individuals Served

This program is designed to reach a variety of populations by working in different communities and with diverse locations. Locations are chosen based on a variety of factors, including the Equity Score heat map and the need to reach specific populations. For example, Metro currently schedules events at Senior Centers to reach older adults and at Harborview and the VA to reach those who qualify for a disability RRFP. The Neighborhood Pop-Up event at Kirkland City Hall was specifically scheduled for a day when schools have early release.

Map of New Locations

A map of proposed new locations is shown below.

Current and Proposed Neighborhood Pop-Up Locations

Source: U.S. Census Bureau 2013-2017 ACS 5-Year Estimates
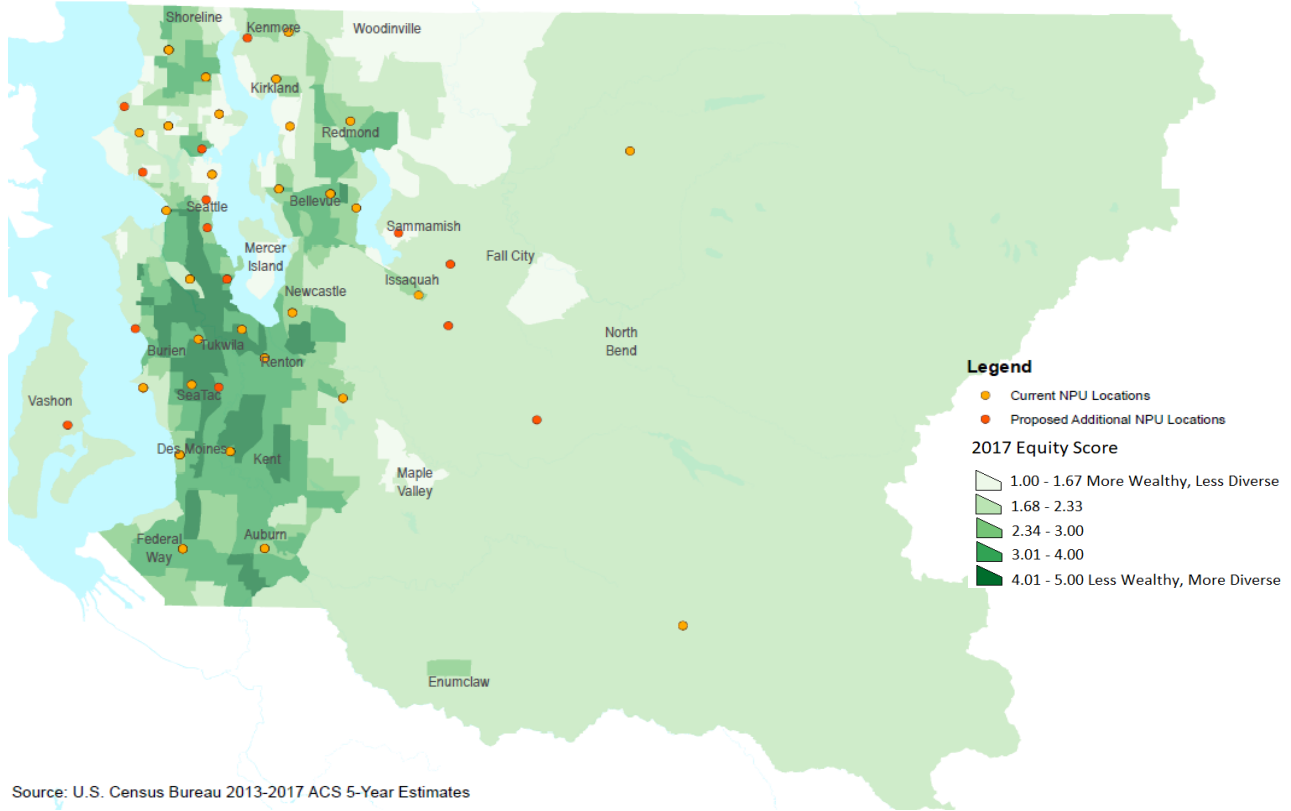
D. Improve communications to customers about fare products and their use.

Metro recommends focusing resources to improve communication about ORCA fare products, including the reduced-fare cards, and their use through the use of ongoing engagement and continuous improvement in markering materials. This would respond directly to the feedback that Metro heard in the engagement process: Confusion about the products and the process is a top barrier to greater utilization of these products. Metro can promote products independently but would need to work with the other ORCA partners to improve shared communications such as the card descriptions and applications.

Estimated Expenses	Y 2019-2020	Y 2021-2022	Y 2023-2024	Y 2025-2026	Total 2021-26
Program Costs - Improved Marketing & Communications	-	-	-	-	-
Focus Groups (coordination, consultants, surveys and evaluation)	-	$50K	$52K	$54K	$156K
Support Services & Materials	-	$50K	$52K	$54K	$156K
Total Expenses	-	**$100K**	**$104K**	**$108K**	**$312K**

VII. Conclusion/Next Steps

The proviso requested an implementation plan to expand the number of locations at which customers can apply for and receive reduced fare ORCA products (RRFP and Youth cards).

Metro evaluated eight potential strategies which could respond to this:
1. Create a new, standalone Metro customer service center that would offer ORCA sales.
2. Co-locate a customer service center for ORCA sales with a Seattle & King County Public Health Center.
3. Delegate ORCA sales to an outside organization and transfer equipment to its custody.
4. Offer a program in collaboration with community organizations to provide application assistance to customers.
5. Create a network of agencies that provide verification for RRFP and Youth cards.
6. Expand Metro's Neighborhood Pop-Up program.
7. Expand institutional distribution through schools.
8. Expand institutional distribution in other ways.

The strategies were evaluated against the following criteria:
- Feasibility
- High Impact/Ability to Distribute Many Cards
- Customer Experience
- Alignment with ESJ Strategic Plan
- Alignment with Results of Stakeholder Outreach

This resulted in recommendations of these potential strategies:
1. Create a network of agencies that provide verification for RRFP and Youth cards.
2. Expand Metro's Neighborhood Pop-Up program.
3. Expand institutional distribution through schools.
4. Improve communications to customers about fare products and their use.

VIII. Appendices

A. ORCA and RRFP Agencies

Transit Agency	One Regional Card for All	Reduced Regional Fare Permit
King County - Transit & Water Taxis	X	X
Sound Transit	X	X
Washington State Ferries	X	X
Pierce County – Transit & Ferries	X	X
Community Transit (Snohomish)	X	X
Kitsap Transit	X	X
Everett Transit	X	X
Intercity Transit (Thurston)		X
Skagit Transit		X
Mason Transit		X
Jefferson Transit		X
Clallam Transit		X
Grays Harbor Transit		X
Whatcom Transportation Authority		X

B.   Equity Analysis: Utilization Gaps in King County

Reduced Fare Card Distribution Compared to Eligible Population

Source: U.S. Census Bureau 2013-2017 ACS 5-Year Estimates; ORCA Data

C. EMC Research Report on Focus Groups

King County Metro
ORCA Proviso Qualitative Research
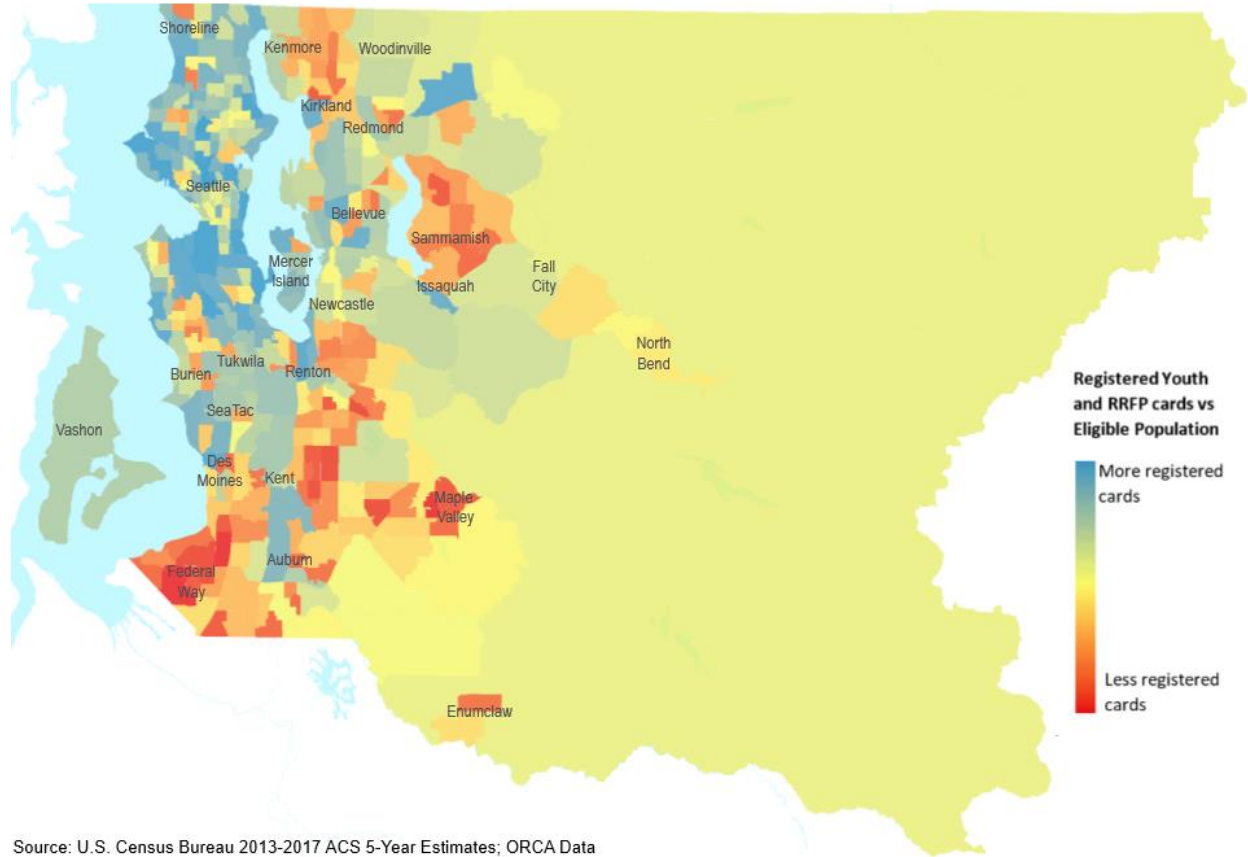
Research Goals

▸ Understand the access needs of target groups for Regional Reduced Fare Permit (RRFP) and ORCA Youth programs.

▸ Understand barriers that prevent target groups from easily obtaining a reduced fare ORCA card.

▸ Identify preferred customer service locations – including geographic and facility type – to apply for and obtain RRFP and/or ORCA Youth Cards.

▸ Identify interest in getting ORCA cards through community social service providers and identify preferred providers.

▸ Understand where to expand locations at which customers can apply for and receive reduced fare ORCA cards.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 2

Research Approach

EMC research

▸ Qualitative research study consisting of a focus group and in-depth interviews.

▸ One Focus Group (FG) was conducted January 16th, 2020 at Consumer Opinion Services (COS) facility in Tukwila.

▸ 8 In-Depth Interviews (IDIs) were conducted by telephone by EMC project staff on January 15th. A focus group was originally scheduled, which was cancelled due to inclement weather concerns.

▸ Respondents were invited to participate based on familiarity and use of Metro's reduced fare programs. The participants in this research were classified as one of the following:
  • They use a **Senior RRFP**;
  • They use a **Disability RRFP**;
  • They are the parent or guardian of a child who uses an **ORCA Youth** card

▸ Please note that the findings from both the focus group and in-depth interviews are analyzed and presented together in this report.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 3

RRFP User & ORCA Youth Parent Profile

EMC research

▸ Participants were recruited based on their or their children's current use of and RRFP or ORCA Youth pass.

▸ Most participants were frequent public transit users.

▸ 11 of the participants were Senior RRFP users.

▸ 4 of the participants were parents of ORCA Youth users.

▸ 3 of the participants were Disability RRFP users.

Date Conducted	Method	Number of Participants
January 15th, 2020	In-Depth Interviews	8
January 16th, 2020	Focus Group	10

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 4

Report Contents

EMC research

- **Findings Summary – *Slides 6-15***
- **Access Needs and Experiences – *Slides 16-29***
  - Satisfaction with RRFP/ORCA Youth – Slides 17-18
  - Sources of information – Slide 19
  - Process of applying for, obtaining, renewing, maintaining a reduced fare passes – Slides 20-24
- **Barriers and Communication – *Slides 25-30***
  - Personally experienced barriers – *Slide 26*
  - Barriers that others could experience – *Slide 27*
  - Communication & Information barriers – *Slide 28-30*
- **Potential Providers and Locations – *Slides 31-47***
  - Currently existing options – *Slide 32*
  - Top-of-mind preferences for potential options – *Slides 33-35*
  - Potential options and expansions tested – *Slides 36-39*
  - Neighborhood Pop-Up units – *Slides 40-47*
- **Recommendations – *Slides 48-51***

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 5

EMC
research

Findings Summary

Findings Summary – Access Needs

EMC
research

▸ Participants in this study experienced a range of access needs which vary by audience.

▸ Senior (65+) participants indicated some mobility needs but largely focused on information and awareness.

▸ Participants with disabilities expressed a range of logistics and accessibility needs, both physically and informationally given the additional verification requirements for their pass.

▸ For parents of children using ORCA Youth, those needs centered largely on time and availability.

▸ Participants were largely satisfied with RRFP and ORCA Youth and are strongly satisfied with the time it took to acquire their passes, the costs of the fares they pay, and the ease of continued use.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 7

Findings Summary – Barriers

▸ Participants were split on the degree to which they encountered challenges while applying for and obtaining the reduced fare passes but most could identify potential barriers for others, if not for themselves.

▸ Although few senior participants experienced tangible barriers to obtaining the passes, the parents of ORCA Youth users and Disability RRFP users in the study expressed some frustration with the process of applying for and obtaining the passes.

  • Particularly for some **parents** in the study, **finding the time to visit a physical location** to obtain an ORCA Youth card was a daunting task, **especially when childcare is required**.

  • Some **users with disabilities** encountered **logistical challenges** because of the requirement to be present in person for applying for a Disability reduced fare pass. The difficulty of **having to commute to King Street Station** was compounded by a perceived **lack of clarity over the additional validation requirements** for the Disability RRFP, which led to **several visits** to the Customer Service Center for at least one participant.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 8

Findings Summary – Barriers

▸ Most participants reported having applied for RRFP by mail or in person with relative ease, particularly Senior RRFP users.

▸ **The limited customer service locations** and **the amount of time needed to travel to the Customer Service Center** were prominent concerns for all three groups of participants, regardless of how and where they originally obtained their passes. They expressed a strong interest in diverse, alternative ways to obtain cards in the future even if the existing methods were already convenient for them, pesonally.

▸ Several challenges cited were **informational** in nature. Most participants were unaware of all of the existing options available, particularly the Mobile Sales Units/Neighborhood Pop Ups.

▸ A few participants also acknowledged the barriers they and others could encounter via an online process. The **logistical barriers to filling out forms and sharing documents, especially if without a printer or computer access** was a top-of-mind concern.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 9

Findings Summary – Locations (Top-of-Mind)

EMC research

▶ Provider preferences varied significantly across audiences and individual participants but they generally agreed a broad mix of options would help hedge against the various barriers potential users might face.

▶ Several participants recommended **online applications** as a top-of-mind preference while noting the technological and informational barriers others may likely encounter.

▶ The specific, top-of-mind preferences for physical providers varied significantly but generally centered around local locations widely available in their towns and neighborhoods and also places they would likely already visit for other reasons.

  • **Libraries**, **community centers**, and **grocery stores** were among the most frequently-suggested top-of-mind locations for applying for and obtaining reduced fare cards.

  • A few participants also mentioned **social service providers**, including **DSHS**, particularly if reduced fare passes can be easily promoted alongside other services.

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 10

Findings Summary – Providers

EMC research

▶ Of the specific full-time providers tested, a majority of participants indicated heavy interest in using an online portal to apply for an RRFP or ORCA Youth card, personally.

  • This interest was prevalent among users across all audiences, though it was not necessarily seen as a single, silver-bullet solution considering the diverse needs of those audiences.

  • Noted caveats were that the platform would need to be straightforward and relatively easy to transfer documents (especially via phone or camera). Some also emphasized the need for follow-up emails to confirm processing status and approval.

▶ Although not a majority, some participants strongly supported making RRFPs available through social service providers like DSHS and Seattle/King County Public Health locations, whether because those locations are more local and easily accessible than the Customer Service Center in Downtown or because they already visit those locations for other reasons.

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 11

Findings Summary – Providers

EMC research

▶ Parents were highly enthusiastic over the idea of having more **schools distribute ORCA Youth cards directly**. There was practically a sense of relief this option would have in saving time and eliminating the logistical frustrations cited around finding childcare.

▶ For physical locations, specifically, some parents recommended nearby places that were already equipped with the means to keep their children entertained, including **community and recreation centers** where games and amenities already exist.

▶ Harborview Medical Center was generally considered the least desirable RRFP and ORCA Youth full-time provider partnership.

  • Participants generally considered Harborview at least as inconvenient, if not more so than the existing Customer Service Center in King Street Center.

  • Additionally, participants didn't necessarily consider Harborview a location they would be likely to visit for another purpose that could be easily combined with obtaining a reduced fare card.

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 12

Findings Summary – Mobile Sales Units/NPUs

EMC research

▶ Most participants had not heard of the NPU concept before, though a couple had obtained their reduced fare cards that way and were satisfied with their experience.

  • The reactions around Neighborhood Pop-Ups were mixed, initially, and support was ultimately contingent on several informational and practicality factors.

  • Some participants immediately supported the NPU concept, while others warmed up to it after additional information was given about potential locations and scheduling.

  • There remained lingering concerns about their general efficiency, feasibility of the locations/times available, and how else they could have learned about NPU availability in the first place.

▶ Several participants expressed trepidation over the pop-up concept and had a broad range of concerns surrounding its reliability, communication, and branding.

  • Some participants expressed confusion over the concept and the "pop up" branding itself, noting the term's association with spontaneity and unreliability.

  • Others figured they would be less likely to consider it a top-of-mind option relative to the static locations where ORCA cards are already available, especially if they were in immediate needs of replacement.

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 13

Findings Summary – Mobile Sales Units/NPUs

EMC research

▸ In line with their top-of-mind recommendations for RRFP/ORCA Youth locations, participants were highly enthusiastic about the prospect of acquiring reduced fare cards at **libraries, community centers, and senior centers**, though they may likely prefer those as full-time locations if they were available.

▸ It was also questioned whether NPUs weren't a more practical tool for increasing outreach and visibility among new, potential riders and less geared towards the target audiences who may be more likely seek reduced fare passes at more static locations they're already familiar with.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 14

Findings Summary – Communication

EMC research

▸ For several participants, **communication surrounding the available options was as integral to improving the ease of obtaining reduced fare cards** as expanding the providers and locations in the first place.

▸ Regarding NPUs, specifically, participants felt they would be most likely to consider using them if they were tightly integrated with a **heavily-promoted online resource** where they could easily learn about upcoming locations.
  • Several participants suggested **permanent advertisements on-board buses and at stops/stations** to inform them about NPUs and direct them to an online schedule, as well as to prime the pump for riders approaching age 65 to learn about RRFP ahead of time.
  • Participants also recommended heavily advertising the upcoming NPU appearances at the locations they recurrently appear.
  • Acknowledging the diverse schedule needs of seniors, parents, and others who may use NPUs, participants suggested a staggered mix of afternoon and evening locations covering both weekdays (particularly midweek for seniors) and weekends.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 15

EMC
research

RRFP & ORCA Youth
Experiences & Access Needs

Overall Satisfaction with Reduced Fare Cards

EMC research

- Overall, participants are largely satisfied with their RRFP and ORCA Youth cards.
  - There are a few points of frustration that users raised, including some logistical and technical issues, but these do not seem to impact the high levels of overall satisfaction. One participant with a disability mentioned having some difficulty with physically handling the card.

- Nearly all users say they are very likely to recommend RRFP to other people whom they know are eligible, and some say they already do so.

- Users of the RRFP consider the reduced fare prices they pay to be very reasonable.

"Very satisfied. There's only one thing I didn't like. It was very difficult to navigate how I could get the pass to automatically reload once it got to be $10 or less." – Senior RRFP user, IDI

"I'm already quite strongly recommending the ORCA card. I don't think I can increase my recommendation anymore." – Senior RRFP user, IDI

"Well, in using [RRFP card], sometimes as a disabled person, it's kind of hard to get the card out and do the tapping. Just depends on your level of disability. Sometimes when it's pouring down rain: One day I kept trying to tap the card and it wouldn't read it and so I got on the light rail and lo and behold, there happened to be a fare checker and so he carded me on it. Said, 'Hey, you didn't tap it.' 'I tried.' Also, he gave me a warning. Sometimes it's hard for a disabled person to get the card out and do the tapping."

"I try to put it close to the outside of my wallet so I can just pull my wallet out and tap it. But there sometimes can be a security issue. For example, I had somebody grab my wallet when I was getting on light rail." – Disability RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 17

Satisfaction with the Process of Getting a Reduced Fare Card **EMC** research

▸ Most participants found the process of obtaining an RRFP to be generally reasonable, though not without challenges.

▸ There were noticeable discrepancies between ORCA Youth/Disability RRFP users and Senior RRFP users. Almost all seniors mentioned how easy the process was. Those who had to verify Disability RRFP eligibility and ORCA Youth parents with busy schedules faced more significant barriers as they went through the process.

> *"I know I got it within a week so I definitely feel like that's very reasonable compared to like other programs and how long it typically takes to get something that it was actually really fast."*
> – ORCA Youth parent, IDI

> *"They really need to do a web interface, like they do for state IDs and stuff, so that you don't have to go all the way in. I mean that would be a big difference because especially somebody who's got cerebral palsy or something, they have to not only arrange for them to get there but also for their caregiver to get there."* – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 18

Sources of Information about Reduced Fare Cards **EMC** research

▸ When asked about how they first heard about the RRFPs, respondents brought up a variety of sources such as advertisements seen either on the bus or online, community service centers or libraries, and often, word of mouth from bus operators.

▸ Many Senior ORCA users say that they had known about the Senior program beforehand, mostly through friends and relatives, and started using it after they turned 65.

▸ Disability ORCA users cited places where they receive services regarding their disability, such as health services or community centers, as an initial source of information.

▸ Parents of ORCA Youth users had often heard about the passes at their kids' school or from other parents.

▸ In several instances, bus drivers or employees at a library or community center have guided people who looked like they qualified to switch to RRFP.

> *"I was paying full fare and one of the bus drivers was like, "You know, you qualify for one of the disability reduced fare. And I went, Oh, tell me where to go!"*– Senior RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 19

Experience of Applying for Reduced Fare Cards

▸ Most participants thought that the application process was straightforward; notably Senior ORCA users, parents of ORCA Youth users who received their card through school, and Disabled ORCA users who were guided through the process by a public agency employee.

▸ Multiple seniors mentioned how easy the process was for them, personally, since they simply had to show their driver's license to prove their eligibility.

▸ Some did mention some challenges that others might have, including being unaware of the different ways to obtain reduced fare cards and finding the time to go somewhere to apply for them.

"For me, I liked how the place that I went almost every day of the week. It was like the whole photo process and getting the actual card, everything was there in the building that I went to a lot anyway. So it's not like I had to go up to Seattle and get it. So that was really easy and beneficial." – Senior RRFP user, FG

"I just went there, to the office and stood in line. And that was giving good professional civil service, and it was over." – Senior RRFP user, FG

"I recommended it to my wife. She just turned retirement age... She hasn't [tried to apply for an RRFP yet] because I applied for mine Downtown and so she's sometimes busy and I don't know how she can apply for one, reduced fare without going Downtown." – Senior RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 20

Experience of Applying for Reduced Fare Cards

▸ However, there were exceptions to this positive view, with some participants remembering a more arduous process. These complaints emanated either from some form of misinformation that they were given, or technical problems with the passes themselves.

• Some Youth and Disability RRFP users had some level of difficulty during the application process due to eligibility verification.

"…I had to send in my daughter's birth certificate, I did it over mail. … Why do you have to prove that the kid is a kid? " – ORCA Youth parent, FG

"….they said I could do it over the mail. I had to send in like three different kinds of paperwork and then I called them because I never heard back. And they're like, oh you can't do it by mail and we're not set up for that right now. And you have to go into the station and the only station I could go to was King street. So now I'm paying for all these buses to try to get the reduced fare. And then they said they couldn't take the photocopy of my doctors write up or my disability card that I had to have the original of the doctors…I meant it was a mess." – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 21

Experience of Obtaining Reduced Fare Cards

EMC research

▶ Most participants said they received the their RRFP pass or ORCA Youth in a "very reasonable" time.

▶ The recollection of the wait time to receive a pass ranged between 5 to 10 days, and those who applied online find the timeframe reasonable.

▶ However, the experiences of two Disability RRFP users differed significantly from one another.
  • One participant had a Neighborhood Pop Up unit at her health clinic and was able to obtain the card within 30 minutes.
  • Another Disability RRFP user applied for the card at the King Street HQ and had to make five separate visits due to eligibility verification issues.

"…it was five trips total…It was ridiculous. I kept going back in because they kept telling me different thing…" – Disability RRFP user, FG

"With a senior card, it takes no time." – Senior RRFP user, FG

"I got mine at Town Mental Health in Auburn. They specifically have that there for people on disability. So, they had people come from Metro would take the picture there. Give passes out there. So that's how I got mine." – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 22

Experience of Replacing or Renewing Reduced Fare Cards

EMC research

▶ Not too many participants had experiences with renewing or replacing their RRFP since Senior ORCA passes do not expire. Some parents of ORCA Youth users remembered having had to replace lost cards as children seem to lose those more easily, but the level of ease they reported did not differ from their experience of initially acquiring the pass.

▶ At least one participant voiced concerns about the idea of replacing her card, both because of logistical issues and because she had heard that the process had changed since she first applied for her pass, and she was unaware of how it now worked or whether there were other reliable ways to obtain it without traveling to Downtown Seattle.

"I wish there was like a way that for the youth to keep hold of it. I know like my daughter might lose her sometimes and I mean that's not really something that they would be able to fix like electronically or something. It's kind of hard for kids to hold it. I know even my sister she had one when she was in high school. She just graduated a couple years ago. I know she's lost it plenty of times and my mom had to replace it. " – ORCA Youth parent, IDI

"…I don't know where my current reduced fare permit is, that if I can't find it and I need to replace it, A, I live in Kent. Going into Seattle is sometimes difficult, especially if I don't know exactly where it is, I'm going. And B, I've been told I would need to do the monthly sticker and previously I didn't have that. So, I have reluctance as to whether I even want to try to get another one." – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 23

Experience of Maintaining Reduced Fare Cards

▸ A few participants mentioned their card's durability as a concern. One example was the card breaking after just a few months of use.

▸ A parent of a child who uses ORCA Youth suggested that the cards appear different than regular ORCA cards. She remembered having mistakenly picked up her daughter's card multiple times.

▸ A Senior RRFP user said it was easy to confuse their cards between herself and her husband since they did not display the user's name on them.

"…that card snapped in half three months later. And so, I had to do the whole thing over again. At one point I tried to do it in the mail and it just never came. Acquiring, it was a mess. And then sometimes the RF readers do not work. Like I had said earlier, and that's a pain.." – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 24

EMC research

Barriers & Communication

Personal Barriers

EMC research

- The requirement of physical presence while applying was the most significant barrier Disability RRFP users had encountered. South King County participants mentioned the length of commute in order to apply in person in downtown Seattle.

- While applying online is a preferred method, access to printers and scanners had been an issue for some participants.

- Younger parents mentioned the difficulty of bringing multiple children with them to downtown. One suggested having a location that could keep children occupied while their parents apply. One parent brought up the difficulty of getting childcare while applying for their kids' ORCA Youth as a significant barrier.

"I'd say it's somewhat difficult for a disabled person or retired person to go down and stand in line… I think back then I was using a walker and so it's kind of awkward to be in line and use a walker to go through line…"
– Senior RRFP user, IDI

"For me it's accessibility. I'm fairly mobile for somebody who's handicapped. I can get up for a limited distance out of my scooter. But I'm in Kent, so to have to go all the way to downtown Seattle and get off a bus and navigate to the station and get out, go in, deal with the lines, get back through, deal with the crowd. There are people who are in my community who aren't going to bother with that, especially when a lot of the drivers will just let the handicaps go without doing anything. ..they're like, why should I go through so much hassle to get down there."– Disabled, FG

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 26

Barriers for Others

EMC research

▶ Participants were also asked their opinion about what barriers other people could face while applying for and getting an RRFP or ORCA Youth.

- A few participants mentioned lack of technical know-how or equipment could be an issue for some, especially older people.
- Many thought that mobility issues would be a barrier to potential Disability RRFP users.
- Most barriers that participants could think of had to do with location or just finding the time to apply. Cost of applying has almost not been mentioned at all.

"They have a lot of deadlines and lot of time demands... I think it'd just be getting down there, finding the time to go down, stand in line and get one."
– Disability RRFP user, IDI

"So my ideal would be filling out the form online...I think it would be ideal for a lot of young parents like myself. I know like my area is very, very diverse. There are parents that are my age and there's also parents that are older and aren't used to having electronics. So, I mean just like with any other thing it would be easier for some, but not all." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 27

Reduced Fare Pass Communications

EMC research

▶ The importance of convenience of locations notwithstanding, several participants also pointed out that communication and advertisement was a critical component for getting more eligible people to apply for and use reduced fare passes. In other words, a lack of information about this option can be as significant a barrier as any physical or logistical challenge to obtaining reduced fare cards.

▶ Despite being familiar with the programs, several participants were unaware of all of the existing methods for applying for and obtaining reduced fare cards.

"There were no barriers. It was, well maybe I could say this. I didn't really know about it until that advertising. So that was really the only reason I didn't have [an ORCA Youth Card for my son]. It's like, I didn't really know there was a youth specific card. But when I saw the promotion, that was when I signed up for it. Signing up for it was pretty easy at that point. I think it was, when you normally pay for the card and it was free as part of that promotion. And that might've helped as well, but yeah, it was a pretty smooth process. I don't really recall anything difficult about it." – ORCA Youth parent, IDI

"I know you said that [pop-ups are] something that they do. I have never heard of it. So just like getting the word out about that program would be great too. I mean even like just flyers on the bus. I don't think I've seen one on the bus. Maybe I'm not looking." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 28

Reduced Fare Pass Communications

EMC research

▸ Regardless of the locations available, participants believe it's crucial to promote them heavily and through multiple channels, including online, on-board buses, at libraries and more.

"All of those [providers and locations] would be convenient. I see the problem is how would the general public know that they were going to be there? So the advertising would be important."

"I suppose if you could email people, you could put posters or you could put advertising on buses or at bus stops, or in the newspaper, on television, I don't know. I think you got to hit people in…multiple different ways." – Senior RRFP user, IDI

"Not everybody's going to access the same medium because nobody reads the newspapers anymore, except me. You got television. You got radio. You got the internet and the flyers on the bus, and so you're trying to reach people. I would say probably on the bus. Say, the advertising area that they have on buses that people would see and have enough of an advanced notice that you're going to be … I'm trying to determine, locate bus riders and get to them, being advertised on the buses is probably the best."

– Senior RRFP user, IDI

"You can also publicize it through the city offices and especially again the public library, let them know… The library staff are very focused on providing this kind of information with the public. They frequently put up notices in their buildings and when someone happens to mention that they were in need of this kind of service, they would suggest it rather than just wait for the person to discover it on their own.– Disability RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 29

Reduced Fare Pass Communications

EMC research

▸ Some participants also emphasized the value of long-term communications for reduced fare programs as a way to keep them top-of-mind among a broader audience of riders. They recommended persistent communications to educate riders who may not yet – but could soon qualify – for reduced fare programs.

"If you advertised on the bus that the information on locations and where to obtain is all available on the website, and had the website, the information on the advertising on the bus, that would give people then the access to get that information and make a determination on their own."

"It could just be a standard at one of the advertising panels up there on the bus that said, 'For more information regarding all of these programs anytime you need it, just go to this website.' And so, that would be there all the time. So, when people age out, as they get on to be 60s and later, that would be familiar, with seeing that on the bus, and then not have to have questions about where to go."

"They'll see it beforehand, and when you're getting on and off the bus daily, you're going to run into it at some time and know that that program is even available. Even if you were not aware of it beforehand, they'd certainly get it while riding the bus. That would be the best option, I think."

– Senior RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 30

EMC research

Potential Providers

Preferred Existing Options

EMC research

▸ Among existing options for acquiring a reduced fare pass, applying via mail and in-person at the King Street HQ were the preferred methods to get or renew an RRFP or ORCA Youth among the existing options.

▸ Participants favored mail for its ease of use and not having to go Downtown.

▸ Some participants who were less concerned about mobility or lived at convenient distance to Downtown said they preferred King Street due to its regular business hours and fixed location, as opposed to pop-up sales units.

"The mail would be more convenient. I'm assuming there's only service center somewhere and the mobile things are kind of on some sort of rotating schedule. Yeah. Doing it by mail was the easiest of those three options."– ORCA Youth parent, IDI

"I'd rather do it in person. But the problem is that when I went to do it in person, they were closed. They had strange hours. So doing it in person would depend on office hours and how far and how many places there were to do it."– Senior RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 32

Potential Expansions: Top-of-Mind

EMC research

▸ Libraries were popular given their regular hours and lack of crowds. Some participants also brought up library employees' training in helping their clientele navigate paperwork as another benefit of adding libraries among possible locations to get an RRFP or ORCA Youth card.

▸ Schools were mentioned as a good option for ORCA Youth but less so for the RRFP. Participants reckoned having seniors and adults checking into a school could pose problems.

▸ Multiple participants suggested having the RRFP at retail locations such as grocery stores, since they already went to those places frequently.

"…There are more libraries than there are community centers, senior centers, or city halls, so, for convenience's sake, libraries would be the most logical place." – Senior RRFP user, IDI

"I would say the ideal method would be probably, I'm kind of debating between an online, streamline, online process, that's easy. Or just having more locations, whether it's at a store or pop up locations…" – ORCA Youth parent

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 33

Potential Expansions: Top-of-Mind

EMC research

▸ A list of top-of-mind ideas for potential locations to acquire reduced fare passes includes:

- Libraries
- City halls
- Community centers
- Senior centers
- Shelters
- City's/County's community service offices
- Food banks
- DSHS
- Hospitals
- Mental health centers
- Post offices
- Grocery stores or drug stores

- Banks
- ATMs
- Gas stations
- Kiosks
- Schools
- Online

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 34

Potential Expansions: Top-of-Mind

EMC research

▶ Overall, participants liked the idea of "hitting two birds with one stone", that is, expand ORCA's network to places that they or other potential users could be going to in their everyday lives for other purposes, and be able to apply for and obtain a reduced fare card there.

> *"…I would say like DHSH or partnering with some of the biggest issues being handicapped and trying to do this stuff is when you have a limited amount of time up and about and in your chair, you have to budget your time very carefully. If you can hit the food bank and get your Orca card at the same time, that's two stones off work. There's always trips to the DHSH office to fill out something or take care of something. They already have the infrastructure in place, something along those lines, or partnering with food banks would be really good to show that the county is supporting local food banks, and that takes some of the stigma off of it, I would think, for people who feel bad about going for reduced fares, because I know some people who that's a factor for them."* – Disability RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 35

Potential Expansions: Online Portal

EMC research

▶ Online option was popular with younger parents of the ORCA Youth program. They mentioned the ease of doing it at home and not having to take their children with them to a fixed location.

▶ Many saw the online portal as a convenient method but wondered how eligibility verification would work in practice over a portal.

▶ A few participants mentioned the possibility of just faxing or email eligibility documents via the online portal.

> *"Everybody has a phone with a camera or a laptop with a camera or someone they can access. You put those documents on, you fill out your paperwork. If you have to pay a fee, you do that all right there. If they decided they want photo ID, there's a camera right there."* – Disability RRFP user, FG

> *"….my ideal would be filling out the form online….Once that form is completed online if there's any pertinent documents that I want to be able to fax in or email in or bring it into the location I would even be able to do that. So filling out the application. Getting an email stating that your applications been received and being processed. Once it's processed getting another email stating it's been approved."* – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 36

Potential Expansions: Other Providers

EMC research

- Generally, expanding the network of potential providers was viewed positively as some possible providers that were suggested felt convenient to access. Participants emphasized, however, that these added locations should be well known and convenient to access.

- Libraries and community centers were the most popular among suggested potential providers since those are spread out around the area, have fixed locations, and lack crowds.

- DSHS offices were favored only by participants who already use those locations. Among study participants, those who visited DSHS were lower-income participants and participants with disabilities.

"I think a library would be great. I know that a lot of libraries have like those private conference rooms. If they can set it up that way I can see something like that being a type of setup which would be nice.– Senior RRFP user, IDI

"I would say like DHSH or partnering with some of the food banks. One of the biggest issues being handicapped and trying to do this stuff is when you have a limited amount of time up and about and in your chair, you have to budget your time very carefully. If you can hit the food bank and get your Orca card at the same time, that's two stones off work." – Disability RRFP user, FG

"…you're going to have more people there that may be eligible for the reduced fare [community centers], other than just seniors, and again, they would have longer hours than a school would." – Senior RRFP user, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 37

Potential Expansions: Other Providers

EMC research

- Harborview Medical Center was the least favored option, since it was not considerably more convenient than King Street HQ to most participants.

- Then again, hospitals in general were viewed favorably especially by disability RRFP users since it had the potential to streamline the process for them.

"I'd say that [Harborview Medical Center] would probably be more like, probably a two or three because there's a lot of traffic there, too, parking and stuff we'd have to think about down there. It's probably just as easy to go downtown.." – Senior RRFP user, IDI

"…I think hospitals in general is a great idea. For anybody, you know, if that's where you get the note, if you have a disability, the doctor would give you the note that you have a disability and then you can get it right there, that would be great.." – Senior RRFP user, IDI

"A lot of people that go to Harborview, in my opinion, and I say this because I work at a hospital – they're not people that would be able to take advantage of that…I feel like a lot of people who go to Harborview they're not worried about getting an ORCA card. So I don't think that would be a great resource." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 38

Potential Expansions: Schools (ORCA Youth)

EMC research

▸ Parents of ORCA Youth users saw significant value in letting students sign up for the program directly through school. Parents of kids whose school already offer that option had very positive experiences with getting informed about, applying for, and obtaining the ORCA Youth card.

▸ Non-parents exhibited trepidation of having to visit schools as visitors, particularly as they require signing in and have restricted access on weekdays.

"…[at] the middle school, her process was, it was more of a, here you go. Whereas the high school process, two and half years ago, you had to actually request it." – ORCA Youth, IDI

"That is actually great. Like I said I know they used to do that at Seattle public schools. I haven't heard of it over in this area, but that would be like awesome. ." – ORCA Youth parent, IDI

"The schools they don't allow people just to walk into schools." – Senior RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 39

EMC research

Neighborhood Pop Ups

Potential Expansions: Overall NPUs

EMC research

▸ The Neighborhood Pop-Ups initially confused some participants. A few participants had concerns about being able to find them before the sales units left a given location.

▸ The greatest concerns about NPUs revolved around being informed about their schedule and locations on time, as well as whether they would be set up at convenient places.

▸ NPUs had the most support from younger participants. ORCA Youth parents and Disability RRFP remarked how much easier it would be not to have to go downtown.

"And the reason I rated the mobile popup low is because it sounds something which is a little bit harder to predict where it's going to be. Like you have to do a little bit more research and the scheduling has to work and it's sounds more of a hassle than sort of a location where you kind of know."–Senior RRFP user, FG

"So here's a fun thing for you. Pull out your phone after this is over and see how long it takes for you to find an accurate location schedule for the popups, because you are going to have more challenge with that." – Senior RRFP user, FG

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 41

NPU Preferences

EMC research

- Older participants appeared confused by the name "Neighborhood Pop-Up". The name gave the impression that the pop-up units were fleeting and temporary.

- A few participants mentioned changing the name to "Metro Mobile" or "Metro Outreach" for a clearer description.

> "…having it at like a great central location that would be easy for people to get to would also be a nice thing to have with the program. I know you said that it's something that they do. I have never heard of it. So just like getting the word out about that program would be great too. I mean even like just flyers on the bus." – ORCA Youth, IDI

> "So the name itself doesn't inspire confidence. What would be a, I guess, what would you think a better name might be, Mobile Location? Community Outreach Station? You know some something along those lines."– Senior, FG

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 42

Reactions to Proposed NPU Locations

EMC research

- A majority of participants saw libraries, community centers, and senior centers as natural locations for NPUs. Libraries and community centers were popular due to participants knowing their location and their wide coverage. Senior RRFP users recommended senior centers as NPU locations to reach seniors who may not know about the reduced fare.

- Schools were not seen as a great option due to how busy they can be, lack of parking during peak hours, and the security concerns of visiting a school during the day.

> "…the ones that I rated highly there were the ones where they're kind of smaller, low-key venues like the local library is a good one. I mean they're particularly good for me, it's just down the street but it's the kind of place where you can kind of casually go into it and get it done as opposed to city hall or the hospital, which sounds like a bit more of a process to navigate."
> – ORCA Youth, IDI

> "…having a fairly high density of locations to get to for people who aren't necessarily able to travel very easily. That, the detail stuff. Any sort of like local service center, so you said a local school, local library. If you have any of the clinics and stuff that you mentioned, I could imagine that that would be useful too. Any sort of social services kind of building, something but again, it's kind of the smaller institutions, like libraries and stuff where there's kind of a lot of them scattered around so you don't necessarily have to travel very far to get it done." – ORCA Youth, IDI

EMC #20-7560 ORCA Proviso Qualitative Research DRAFT | 43

Other NPU Locations

EMC research

▸ Many participants mentioned grocery or drug stores as a good potential NPU location.

▸ Post offices were also mentioned as a possible NPU location since most already know where those locations exist.

▸ One participant thought food banks as a possible location to reach low-income residents

"Like I know when I did receive assistance it's easy if like everything's in the same location. Like say if someone needed to apply for food assistance or some type of benefits like housing. To have that card, that program there available on site as well. It would be convenient for a lot of people."
– ORCA Youth, IDI

"Yeah. But I think the farmers market would be a good location because there's farmers market in West Seattle, Columbia City, Renton, and various places. Just about everybody knows where the farmers markets are, in my opinion." - Disabled, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 44

NPU Communications

EMC research

▸ Most participants thought the best way to get the word out on NPUs to transit riders was advertising on the buses themselves and online.

▸ Flyers, posters, and handouts at community centers were frequently brought up as other preferable ways to announce upcoming NPUs. Another potential avenue for advertising NPUs that was proposed is NextDoor app, as some participants said they and their neighbors already used the app often.

"… if you advertised on the bus that the information on locations and where to obtain is all available on the website, and had the website, the information on the advertising on the bus, that would give people then the access to get that information and make a determination on their own." – Senior RRFP user, IDI

"…most communities have NextDoor. …That's one way you could communicate." – Disability RRFP user, IDI

"I would be interested if I could see if there was a schedule so I knew when they were, and it would depend on where they were." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 45

Preferred NPU Set Up

EMC research

▶ Overall, participants preferred having an indoor set up for the NPUs rather than having them outdoors.

- Weather was the reason most often brought up for this preference.
- Some participants expected an outdoor set up to have higher visibility, which could help drawing attention of people who would not see advertisements easily otherwise. Then again, they thought among people like themselves, visibility was not an important factor.

"…Well, because of the weather, Seattle weather. You stand outside in front of a truck when it's pouring down rain, especially if you're disabled in a wheelchair." – Disability RRFP user, IDI

"… If it's a truck somehow that seems to attract more attention, like the food truck, that's more interesting than just a little table somewhere inside the library. It might just generate more interest." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 46

NPU Hours

EMC research

▶ Most participants imagined that it was hard to find a time that would work with everybody's schedule.

- Senior RRFP users felt they could be more flexible, but it was harder to accommodate working people's schedule.
- ORCA Youth parents had a harder time to pinpoint an ideal daytime, since they are already juggling with their own and their kids' schedule.

▶ Given those constraints, a mix of weekdays and weekends with extended hours was suggested by some participants.

"…For me, it wouldn't make that much difference, but for the working people a Saturday or Sunday. Probably Saturday. … [For my wife], well, for her, it'd probably be before she went to work, which she works in the afternoon. Morning would be good for her." – Disability RRFP user, IDI

"… During the school year, then, oh that's a tough one, because before school parents are in a rush, and they're dropping off their kids, so they don't have time to look at anything other than getting off to work. And after school this's also kind of tough, because some kids don't go straight home, they go to afterschool activities, so a parent is not there." – ORCA Youth parent, IDI

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 47

EMC research

Recommendations

Recommendations

EMC research

▸ Participants are largely satisfied with the RRFP and ORCA Youth programs. They consider fare costs and time of obtaining the cards to be very reasonable but the process of applying for and obtaining reduced fare cards is a greater area of focus for the Disability RRFP users and parents in the study than for seniors.

▸ Limited locations is a commonly-cited barrier to address, especially for those with accessibility needs who are required to travel to a physical location to complete the verification process. Parents also face challenges with finding the time to visit with their kids and daytime working hours. Neither group wants to travel far to apply for their passes.

▸ Most participants are highly enthusiastic about the online portal, particularly if it is widely promoted, its process and instructions are clear, and users can easily upload images of all of the required verification documents.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 49

Recommendations

EMC research

▸ For physical locations, respondents ideally prefer permanent locations with consistent hours that are abundantly available throughout the county. Libraries and community centers would be among their ideal top-of-mind preferences.

▸ Although not their top-of-mind choice, partnerships which give people options to obtain cards more conveniently and closer to home – including DSHS, Public Health clinics, or community hospitals – are welcomed as improvements, especially if they can be paired with other services people already receive at those locations.

▸ Participants are less aware of and have mixed reactions to expanding Mobile Sales/Neighborhood Pop Up Units. They express uncertainty surrounding the consistency of and ease of finding schedules, the perceived lack of timeliness when they need new passes immediately, and confusion over the "pop up" branding and its associations with spontaneity and unpredictability.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 50

Recommendations

EMC research

▸ With additional information, many participants warmed up to the idea of NPUs – especially if available at nearby libraries, community centers, and senior centers – but several communication and timeliness hurdles remain. They would strongly prefer the schedules be easily accessible online and heavily and consistently promoted on buses, at stations, and at the physical locations they appear.

▸ Given their particular barriers, parents in the study are widely enthusiastic about the idea of having ORCA Youth cards available directly through schools.

▸ Regardless of the expansion options Metro pursues, prominent communication is critical, both for promoting the availability of the methods/locations and to improve broader awareness for the RRFP and ORCA Youth programs. Persistent on-board and online advertising would help keep reduced fare programs top-of-mind, and may also be valuable in priming the pump for riders who qualify in the future.

EMC #20-7560 ORCA Proviso Qualitative Research **DRAFT** | 51

D. Verifying Agencies: Phase 1 Locations - Addresses

Harborview:

- Harborview ....325 9th Ave, Seattle, WA 98104

Public Health:

- Federal Way Store Front...1640 318th Pl, Federal Way, WA 98003
- Catholic Community Services Kent .... 1229 W Smith St, Kent, WA 98032
- Renton Public Health ....3201 NE 7th St, Renton, WA 98056
- ORCA LIFT Office .... 201 S Jackson St, Seattle, WA 98104
- Downtown Public Health ....2124 4th Ave, Seattle, WA 98121
- Columbia Public Health Center................................. 10521 Meridian Ave N, Seattle, WA 98121
- Global to Local ....4040 S 188th St, SeaTac, WA 98188

DSHS:

- Auburn CSO... 810 28th St NE, Auburn, WA 98002
- Federal Way CSO...616 S 348th St, Federal Way, WA 98003
- King East CSO ....805 156th Ave NE, Bellevue, WA 98007
- King South CSO... 1313 W Meeker, Kent, WA 98032
- Alderwood CSO ....20311 52nd Ave W, Lynnwood, WA 98036
- Renton CSO ....500 SW 7th St, Renton, WA 98057
- North Seattle CSO ....9600 College Way N, Seattle, WA 98103
- White Center CSO .... 9650 15th Ave SW, Seattle, WA 98106
- Rainier CSO... 3600 S Graham St, Seattle, WA 98118
- Belltown CSO...2106 2nd Ave, Seattle, WA 98121
- Capitol Hill CSO .... 1700 E Cherry, Seattle, WA 98122
- Everett CSO ....840 North Broadway Ave, Everett, WA 98201
- Puyallup CSO ....201 West Main St, Puyallup, WA 98371
- Pierce South CSO...1301 E 72nd St, Tacoma, WA 98404
- Pierce North CSO .... 1949 S State St, Tacoma, WA 98405
- Lakewood CSO ....5712 Main St W, Lakewood, WA 98499
- Sky Valley CSO...19705 US-2, Monroe, WA 98272

E.   Schools Distribution: Contracts for ORCA Cards and Metro Services – 2019-2020 School Year

District/School	Eligible Students	2019-20 Total Contract
Bellevue Public School	4800	$649,157
Highline Public Schools	550	$167,379
Lakeside/University Prep/Evergreen School (Private)	1950	$282,844
Lake Washington Public Schools	1250	$203,512
Mercer Island Public Schools	950	$74,232
Seattle Public Schools*	8500	$1,703,249

*The City of Seattle, using FEPP levy funds, covers another 9,153 students in a similar but separate contract totaling $2.8M. Total 2019 contract is $4,503,249.

F. Schools Distribution: School Districts in King County – Demographic Data

	Total Free/Reduced Lunch Students[14]	Total Enrollment	Percentage Free/Reduced	Estimated middle/high school population	Estimated elementary school population	Current Passes	Current Transit Commute Mode Share in District[15]
Auburn School District	8,436	16,134	52%	8,443	7,691		6.2%
Bellevue School District	3,605	20,431	18%	11,184	9,247	4,800	11.7%
Enumclaw School District	1,234	4,052	30%	2,255	1,797		1.4%
Excel Public Charter School LEA	74	187	40%	4,173	4,173		N/A
Federal Way School District	13,807	23,024	60%	11,940	11,084		8.3%
Highline School District	12,400	19,730	63%	8,675	11,055	550	11.3%
Issaquah School District	1,554	20,312	8%	10,778	9,534		6.8%
Kent School District	13,373	27,841	48%	12,624	15,217		6.8%
Lake Washington School District	3,300	29,124	11%	14,351	14,773	1,250	8.9%
Mercer Island School District	129	4,465	3%	3,536	3,536		8.5%
Muckleshoot Indian Tribe	383	464	83%	27,110	27,110		N/A
Northshore School District	3,058	21,902	14%	9,551	12,351		7.8%
Rainier Prep Charter School District	191	251	76%	28	28		N/A
Renton School District	7,972	15,804	50%	77,44	8,060		8.1%
Riverview School District	461	3,355	14%	1,772	1,583		3.5%
Seattle Public Schools	18,443	54,221	34%	23,529	30,692	17,600	20.8%
Shoreline School District	2,442	9,621	25%	4,560	5,061		14.5%
Skykomish School District	40	57	70%	1,495	1,495		1.4%
Snoqualmie Valley School District	698	7,073	10%	3,509	3,564		4.5%
Summit Public School: Sierra	89	190	47%	95	95		N/A
Tahoma School District	947	8,346	11%	4,437	3,909		2.8%
Tukwila School District	2,150	2,990	72%	1,571	1,419		13.3%
Vashon Island School District	346	1,620	21%	4,810	4,810		22.6%
Grand Total	**95,132**	**291,556**	**33%**	**37995**	**33,992**	**29,000**	16.9%

---

[14] Source: 2016-2017 Demographic Information by School, Washington Office of Superintendent of Public Instruction
[15] Source: 2015-2017 5-Year ACS Data, U.S. Census

G. Metro Neighborhood Pop-Up: Current Locations – Addresses and Facility Types

Location	Address	Type of Location
Burien Community Court	14700 6th Ave SW, Burien, 98166	Community Center
Renton City Hall	1055 South Grady Way, Renton, 98057	City Hall
Shoreline Hopelink	17837 Aurora Ave N, Shoreline, WA 98133	Hopelink/foodbank
Bailey Boushay	2720 E Madison St, Seattle, WA 98112	Medical
Kirkland City Hall	123 Fifth Avenue Kirkland, Washington 98033	City Hall
Harborview	325 9th Ave, Seattle, WA 98104	Medical
Auburn Customer Service Center	1 E Main Street, Auburn, WA 98002	City Hall
Federal Way Storefront	1640 S. 318th Pl, Ste B, Federal Way, 98003	Public Health
Bellevue Mini City Hall	15600 NE 8th St #H9, Bellevue, WA 98008	City Hall
Issaquah City Hall	130 E Sunset Way, Issaquah, 98207	City Hall
Kent City Hall	220 4th Ave S, Kent, WA 98032	City Hall
VA Hospital	1660 S. Columbian Way	Medical
Redmond City Hall	15670 NE 85th Street, Redmond, 98073	City Hall
Bothell City Hall	18415 101st Ave NE, Bothell, WA 98011	City Hall
Green Lake Community Center	7201 E Green Lake Dr N, Seattle, WA 98115	Community Center
Enumclaw City Hall	1339 Griffin Avenue, Enumclaw, WA 98022	City Hall
Green River College	12401 SE 320th St, Auburn, WA 98092	College
Tukwila Library	14380 Tukwila International Blvd, Tukwila, 98168	Library
South Park Neighborhood Center	8201 10th Ave S, Seattle, 98108	Senior Center
Lake City Senior Center	12531 28th Ave NE, Seattle, 98125	Senior Center
Evergreen Hospital	12040 NE 128th St, Kirkland, 98034	Medical
Skyway CSO	12629 Renton Ave S, Renton, WA 98178	Public Location
Woodinville Library	17105 Avondale Rd NE, Woodinville, WA 98072	Library
Ballard Community Center	6020 28th Ave NW, Seattle, WA 98107	Community Center
Wallingford Senior Center	4649 Sunnyside Ave N, Ste 140, Seattle, WA 98103	Senior Center
Des Moines Senior Center	2045 S 216th St, Des Moines, WA 98198	Senior Center
SeaTac Airport	17801 International Blvd, Seattle, WA 98158	Airport
Bellevue Library	1111 110th Ave NE, Bellevue, WA 98004	Library
North Bellevue Community Center	4063 148h Ave NE, Bellevue, WA 98007	Community Center
Federal Way Community Center	876 S 333rd St, Federal Way, WA 98003	Community Center
Fairwood Library	17009 140th Ave SE, Renton, WA 98058	Library
Renton Housing Authority	2900 NE 10th St, Renton, WA 98056	Public Service
Fall City Library	33415 SE 42nd Pl, Fall City, WA 98024	Library
Shoreline Court	17500 Midvale Ave N, Shoreline, WA 98133	City Hall

H. Metro Neighborhood Pop-Up: A Sample of Customer Feedback

"Customer service expertise coupled with collaborative and innovative approach to inform the public about the regional transit system make their services consistent, efficient, and up to date. Since the service improvements started earlier this year, Neighborhood Pop-Up has provided a bi-monthly schedule at Kirkland City Hall that has been growing the number of customers as well as attracting residents from other neighbor cities to Kirkland City Hall for all type of ORCA card needs."
- Armaghan Baghoori | Transportation Program Coordinator, City of Kirkland

"The partnership … has provided City of Seattle and Seattle Department of Transportation the opportunity to better serve aging adults, particularly seniors of color. Through our Senior Regional Reduced Fare Permit (RRFP) Pilot, **Neighborhood Pop-Up** in the local senior centers has allowed aging adults in the community to enroll in this essential, underutilized program. By bringing the resource to the community, the barriers seniors experience in signing up is eliminated and Metro's knowledgeable staff answer any questions community members have. We are thankful for the collaboration and appreciate the collective partnership!"
- Annya Pintak | City of Seattle / South Park and Lake City Senior Centers Program Manager

 ". . . We love having the team come here, they are always so professional and friendly. . . . Having (Neighborhood Pop-Up) come to Bailey saves us so much time and genuinely facilitates clients getting their bus cards who otherwise would not be able to independently get to Metro and do it themselves. We are satisfied customers and look forward to keeping this valuable relationship going in to the future."
- Jeff Matheson, Bailey Boushay House

"Thank you so much for offering Neighborhood Pop-ups! This made it possible for me and my disabled teenaged son to get his reduced-fare Orca card when he needed it. Otherwise, we would have had to wait until summer because of the logistical obstacles of school conflicts and the trip downtown. This is an important program and I hope you continue it."
- A Redmond parent

"I am so pleased that you folks have been setting up in public spaces in the county for people to get ORCA assistance. All of our students use RRFP cards and it is now so convenient to be able to get them cards without having to travel to Seattle. I hope you are able to expand the program to meet the needs of the community in the future."
- Jon Goodman, M.Ed., Lake Washington School District) Transition Academy

" . . . so happy to have the convenience and ease of these mobile locations to conduct business. Michael and Sonya were working the event and they were both very helpful and pleasant. Great program and staff, keep up the good work."
- Customer comment called in to Customer Information Office

Certificate Of Completion

Envelope Id: B85F9A6BDE504C7BB8741232DF7FDDDF   Status: Completed

Subject: Please DocuSign: Motion 15681.docx, Motion 15681 Attachment A.docx

Source Envelope:

Document Pages: 4	Signatures: 2	Envelope Originator:
Supplemental Document Pages: 76	Initials: 0	Angel Allende
Certificate Pages: 5		
AutoNav: Enabled		401 5th Ave
EnvelopeId Stamping: Enabled		Suite 100
Time Zone: (UTC-08:00) Pacific Time (US & Canada)		Seattle, WA 98104
		Angel.Allende@kingcounty.gov
		IP Address: 198.49.222.20

Record Tracking

Status: Original	Holder: Angel Allende	Location: DocuSign
9/30/2020 1:56:37 PM	Angel.Allende@kingcounty.gov	
Security Appliance Status: Connected	Pool: FedRamp	
Storage Appliance Status: Connected	Pool: King County General (ITD)	Location: DocuSign

Signer Events	Signature	Timestamp
Claudia Balducci claudia.balducci@kingcounty.gov Security Level: Email, Account Authentication (None)	DocuSigned by: *Claudia Balducci* F8830816F1C4427... Signature Adoption: Pre-selected Style Using IP Address: 198.49.222.20	Sent: 9/30/2020 2:17:33 PM Viewed: 10/6/2020 10:47:13 AM Signed: 10/6/2020 10:47:26 AM
Electronic Record and Signature Disclosure: Accepted: 10/6/2020 10:47:13 AM ID: a3239ee7-05bb-47ae-a18e-bc3a74bf9d93		
Supplemental Documents:	Motion 15681 Attachment A.docx	Viewed: 10/6/2020 10:47:20 AM Read: Not Required Accepted: Not Required
Melani Pedroza melani.pedroza@kingcounty.gov Clerk of the Council King County Council Security Level: Email, Account Authentication (None)	DocuSigned by: *Melani Pedroza* 8DE1BB375AD3422... Signature Adoption: Uploaded Signature Image Using IP Address: 198.49.222.20	Sent: 10/6/2020 10:47:30 AM Viewed: 10/6/2020 10:56:10 AM Signed: 10/6/2020 10:56:23 AM
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Supplemental Documents:	Motion 15681 Attachment A.docx	Viewed: 10/6/2020 10:56:17 AM Read: Not Required Accepted: Not Required

In Person Signer Events	Signature	Timestamp

Editor Delivery Events	Status	Timestamp

Agent Delivery Events	Status	Timestamp

Intermediary Delivery Events	Status	Timestamp

Certified Delivery Events	Status	Timestamp

Carbon Copy Events	Status	Timestamp

Witness Events	Signature	Timestamp

Notary Events	Signature	Timestamp

Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	10/6/2020 10:47:30 AM
Certified Delivered	Security Checked	10/6/2020 10:56:10 AM
Signing Complete	Security Checked	10/6/2020 10:56:23 AM
Completed	Security Checked	10/6/2020 10:56:23 AM

Payment Events	Status	Timestamps

Electronic Record and Signature Disclosure

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE
From time to time, Carahsoft OBO King County ITD (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

Getting paper copies
At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after signing session and, if you elect to create a DocuSign signer account, you may access them for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a $0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent
If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind
If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of a DocuSign envelope instead of signing it. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically
Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Carahsoft OBO King County ITD:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:
To contact us by email send messages to: bob.johnson@kingcounty.gov

To advise Carahsoft OBO King County ITD of your new e-mail address

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at bob.johnson@kingcounty.gov and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc. to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in the DocuSign system.

To request paper copies from Carahsoft OBO King County ITD
To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to bob.johnson@kingcounty.gov and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.
To withdraw your consent with Carahsoft OBO King County ITD

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

> i. decline to sign a document from within your DocuSign session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;

> ii. send us an e-mail to bob.johnson@kingcounty.gov and in the body of such request you must state your e-mail, full name, US Postal Address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

Operating Systems:	Windows® 2000, Windows® XP, Windows Vista®; Mac OS® X
Browsers:	Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)
PDF Reader:	Acrobat® or similar software may be required to view and print PDF files
Screen Resolution:	800 x 600 minimum

Enabled Security Settings:	Allow per session cookies

** These minimum requirements are subject to change. If these requirements change, you will be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

Acknowledging your access and consent to receive materials electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO King County ITD as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO King County ITD during the course of my relationship with you.