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Agenda - Final

Thursday, May 20, 2021

12:00 PM

To give written or live public comment, please see the top of page 4

Executive Management Committee

Eric Garcetti, Chair

Hilda Solis, Vice Chair

Ara Najarian, 2nd Vice Chair

James Butts

Paul Krekorian

Sheila Kuehl

Tony Tavares, non-voting member

Phillip A. Washington, Chief Executive Officer

METROPOLITAN TRANSPORTATION AUTHORITY BOARD RULES

(ALSO APPLIES TO BOARD COMMITTEES)

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A member of the public may address the Board on agenda items, before or during the Board or Committee's consideration of the item for one (1) minute per item, or at the discretion of the Chair. A request to address the Board must be submitted electronically using the tablets available in the Board Room lobby. Individuals requesting to speak will be allowed to speak for a total of three (3) minutes per meeting on agenda items in one minute increments per item. For individuals requiring translation service, time allowed will be doubled. The Board shall reserve the right to limit redundant or repetitive comment.

The public may also address the Board on non agenda items within the subject matter jurisdiction of the Board during the public comment period, which will be held at the beginning and/or end of each meeting. Each person will be allowed to speak for one (1) minute during this Public Comment period or at the discretion of the Chair. Speakers will be called according to the order in which their requests are submitted. Elected officials, not their staff or deputies, may be called out of order and prior to the Board's consideration of the relevant item.

Notwithstanding the foregoing, and in accordance with the Brown Act, this agenda does not provide an opportunity for members of the public to address the Board on any Consent Calendar agenda item that has already been considered by a Committee, composed exclusively of members of the Board, at a public meeting wherein all interested members of the public were afforded the opportunity to address the Committee on the item, before or during the Committee's consideration of the item, and which has not been substantially changed since the Committee heard the item.

In accordance with State Law (Brown Act), all matters to be acted on by the MTA Board must be posted at least 72 hours prior to the Board meeting. In case of emergency, or when a subject matter arises subsequent to the posting of the agenda, upon making certain findings, the Board may act on an item that is not on the posted agenda.

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REMOVAL FROM THE BOARD ROOM The Chair shall order removed from the Board Room any person who commits the following acts with respect to any meeting of the MTA Board:

- a. Disorderly behavior toward the Board or any member of the staff thereof, tending to interrupt the due and orderly course of said meeting.
- b. A breach of the peace, boisterous conduct or violent disturbance, tending to interrupt the due and orderly course of said meeting.
- c. Disobedience of any lawful order of the Chair, which shall include an order to be seated or to refrain from addressing the Board; and
- d. Any other unlawful interference with the due and orderly course of said meeting.

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The Committee Meeting begins at 12:00 PM Pacific Time on May 20, 2021; you may join the call 5 minutes prior to the start of the meeting.

Dial-in: 888-251-2949 and enter
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Public comment may be taken at the beginning of the meeting or as the Board takes up each item. To give public comment on an item, enter #2 (pound-two) when prompted. Please note that the live video feed lags about 30 seconds behind the actual meeting. There is no lag on the public comment dial-in line.

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La Reunion de la Junta comienza a las 12:00 PM, hora del Pacifico, el 20 de Mayo de 2021. Puedes unirte a la llamada 5 minutos antes del comienzo de la junta.

Marque: 888-251-2949 y ingrese el codigo
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Please include the Item # in your comment.

Email: goinsec@metro.net

Post Office Mail:

Board Secretary's Office

One Gateway Plaza

MS: 99-3-1

Los Angeles, CA 90012

CALL TO ORDER**ROLL CALL**

APPROVE Consent Calendar Item: 36.

Consent Calendar items are approved by one vote unless held by a Director for discussion and/or separate action.

CONSENT CALENDAR**36. SUBJECT: LOCUS LICENSE PURCHASE**[2021-0124](#)**RECOMMENDATION**

AUTHORIZE the Chief Executive Officer to award a one-year, sole-source, firm-fixed price Contract No. PS74047000 to Cambridge Systematics, Inc. for the purchase of Locus software license and maintenance in the amount of \$650,000 on behalf of the Regional Integration of Intelligent Transportation Systems (RIITS).

Attachments:[Attachment A - PROCUREMENT SUMMARY](#)[Attachment B - DEOD Summary](#)**NON-CONSENT****37. SUBJECT: STATE AND FEDERAL REPORT**[2021-0246](#)**RECOMMENDATION**

RECEIVE AND FILE May 2021 State and Federal Legislative Report.

**38. SUBJECT: CALIFORNIA STATE TRANSPORTATION AGENCY -
CLIMATE ACTION PLAN FOR TRANSPORTATION
INFRASTRUCTURE**[2021-0203](#)**RECOMMENDATION**

CONSIDER transmitting Climate Action Plan for Transportation Infrastructure (CAPTI) comment letter (Attachment A) to the California State Transportation Agency.

Attachments:[Attachment A - CAPTI Comment Letter](#)**39. SUBJECT: FARELESS SYSTEM INITIATIVE**[2021-0336](#)**RECOMMENDATION**

Adopt the Fareless System Initiative Pilot Program.

- A. Approve a twenty-three (23) month Fareless System Initiative Pilot; cost-sharing negotiations are underway
- B. Authorization of three Full Time Employee (FTE) positions: one Deputy Executive Officer and two support FTE; staff will be housed in the Office of the CEO; additional staffing needs to be assessed going forward.

Attachments: [Attachment A - Operator Survey Results](#)
 [Attachment B- FTA Fare Equity Analysis Waiver](#)

40. **SUBJECT: 2021 PROGRESS REPORT ON THE METRO VISION 2028 STRATEGIC PLAN** [2021-0230](#)

RECOMMENDATION

RECEIVE AND FILE the 2021 Progress Report on the Metro Vision 2028 Strategic Plan.

Attachments: [Attachment A Progress Report Text v8DRAFT 2021-05-06 1814](#)
 [2021-05-20 V2028 Progress Report Executive Management Committee](#)

41. **SUBJECT: MICROTRANSIT OPERATIONS FARE STRUCTURE AND SERVICE ZONES** [2021-0228](#)

RECOMMENDATION

CONSIDER:

- A. APPROVING the proposed MicroTransit Fare Structure with the introductory rate of \$1 for the remainder of calendar year 2021 and adopt the \$2.50 full fare effective January 1, 2022 for zones 1-8. Additional zones will be set to full fare once the first six months of Revenue Service Operations has concluded.
- B. APPROVING the service maps for MicroTransit Zones (6-8)

Attachments: [Attachment A - October 2020 Item # 23 \(MicroTransit Fare Structure\)](#)
 [Attachment B - Microtransit Service Zones \(Maps and Hours of Operations\)](#)
 [Presentation](#)

- 42. SUBJECT: EXECUTE CONTRACT WITH SOUTHERN CALIFORNIA EDISON (SCE) TO UPGRADE UTILITIES AT DIVISION 9 & EL MONTE TRANSIT CENTER, EXECUTE CONTRACT MODIFICATION WITH BYD FOR DIVISION 9 (D9) DEPOT CHARGERS, AND GRANT DESIGN-BUILD AUTHORITY FOR CHARGING INFRASTRUCTURE**

[2020-0062](#)

RECOMMENDATION

AUTHORIZE the Chief Executive Officer to:

- A. NEGOTIATE AND EXECUTE a cost reimbursable Contract with SoCal Edison (SCE) to upgrade Division 9 (D9) and EL Monte Bus Depot utilities to support the full electrification of Battery Electric Buses procured from BYD, for an amount Not-To-Exceed \$19,565,853.
- B. EXECUTE Modification No. 7 to BYD Coach & Bus, LLC (BYD), to add forty-four (44) Heliox Depot Chargers, software licenses, installation and commissioning support, and twelve (12) year warranty service and support for D9 charging infrastructure at the Firm Fixed price of \$22,938,872 increasing the Contract Value from \$48,528,900 to \$71,467,772.
- C. INCREASE the Contract Modification Authority amount from \$4,777,472 to \$30,778,325 to incorporate upgrades to the charging infrastructure and for vehicle configuration changes for Contract OP28367-002, with BYD Coach & Bus, LLC.

CONSIDER:

- D. FIND that awarding a design-build delivery method authority, pursuant to Public Utilities Code Section 130242(b), will achieve for Metro certain private sector efficiencies through the integration of design, project work and components.

Approval requires a two-thirds affirmative vote.

- E. Approve the hiring of an initial five (5) new, non-contract full-time employees as a part of the FY22 midyear budget process to ensure the successful delivery of the ZEB program.

Attachments: [Attachment A - Procurement Summary](#)
 [Attachment B - Contract Modification Log](#)
 [Attachment C- DEOD Summary](#)
 [Attachment D - Funding-Expenditure Plan](#)
 [Presentation](#)

**43. SUBJECT: AMEND THE METRO ADMINISTRATIVE CODE TO REFER
 TO THE BOARD SECRETARY AS BOARD CLERK**

[2021-0345](#)

RECOMMENDATION

APPROVE Motion by Directors Garcetti, Solis, and Najarian that the Board of Directors amend the Metro Administrative Code Section 2-10-010 to refer to the Board Secretary as the Board Clerk.

From:

2-10-010 Appointment of Board Secretary

The Board of Directors shall appoint a Board Secretary who shall be a full time officer of the MTA.

To:

2-10-010 Appointment of Board Secretary

The Board of Directors shall appoint a Board Secretary who shall be a full time officer of the MTA and be referred to as Board Clerk.

WE FURTHER MOVE that the Board of Directors direct the Board Clerk to prepare a strategic plan, including but not limited to:

1. Delivering continuous improvement to encourage meaningful public engagement and improve accessibility of Board meetings, materials, and public comments; and
2. Continuation of effective public engagement options developed as Metro and L.A. County jurisdictions responded to the pandemic and its recovery process.

SUBJECT: GENERAL PUBLIC COMMENT

[2021-0300](#)

RECEIVE General Public Comment

Consideration of items not on the posted agenda, including: items to be presented and (if requested) referred to staff; items to be placed on the agenda for action at a future meeting of the Committee or Board; and/or items requiring immediate action because of an emergency situation or where the need to take immediate action came to the attention of the Committee subsequent to the posting of the agenda.

COMMENTS FROM THE PUBLIC ON ITEMS OF PUBLIC INTEREST WITHIN COMMITTEE'S
SUBJECT MATTER JURISDICTION

Adjournment



Board Report

File #: 2021-0124, **File Type:** Contract

Agenda Number: 36.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: LOCUS LICENSE PURCHASE

ACTION: APPROVE RECOMMENDATION

RECOMMENDATION

AUTHORIZE the Chief Executive Officer to award a one-year, sole-source, firm-fixed price Contract No. PS74047000 to Cambridge Systematics, Inc. for the purchase of Locus software license and maintenance in the amount of \$650,000 on behalf of the Regional Integration of Intelligent Transportation Systems (RIITS).

ISSUE

The current Locus software license, which provides Location-Based Services (LBS) data and was used to support the development of the NextGen Bus Plan, provides only limited 2017 and 2020 data and contains usage restrictions that reduce the effectiveness of this license. As the region emerges from the impacts of COVID-19, new data requirements and expanded usage of the license is needed to determine impacts to the transportation system and identify mobility improvements.

BACKGROUND

Data has emerged as a critical component to better understand transportation and in particular the impacts of the COVID-19 pandemic on mobility. Data and data services are increasingly provided through new forms of licensed software that enables agencies to improve awareness, analyze transportation/mobility impacts and develop more informed decisions. The essential role of data and its management is identified in Metro's Recovery Task Force report and the Board's Street Safety motion. As an example, data services, provided through the Locus license, were used by Metro Operations in the development of the NextGen Bus Plan.

DISCUSSION

In support of Metro's Vision 2028, staff has identified emerging data sources that can be used to better monitor, analyze and improve mobility, transportation and equity. Cambridge Systematics' LBS Locus software represents one such data source. Metro's current Locus license contains usage restrictions that limit access to the data and provides a limited dataset. The new license will enable Metro, through RIITS, to increase both the number of data users and provide an expanded menu of

available data.

In support of this action, RIITS coordinated with a variety of units including Operations, the Office of Extraordinary Innovation (OEI), Highway Programs, Planning and Equity. As a result, the new license will include LBS data covering transit, rail, goods movement, traffic, bike, pedestrians, and telecommuting. The license will allow RIITS to share the software and data through a non-exclusive, nontransferable, unlimited, royalty-free, paid-up, and perpetual license. Future renewals may include additional datasets and data refreshes or updates. The processed data, provided via the Locus license, provides a historical perspective and presents the opportunity to better understand aggregated travel pattern. RIITS, working in collaboration with stakeholders, will continue to identify and pursue data sources and licenses, including emerging big data opportunities, that will enhance Metro's ability to understand, monitor, analyze and develop solutions to improve mobility, transportation, and equity.

DETERMINATION OF SAFETY IMPACT

Approval of the recommended actions may have a positive impact on the safety of the public and our employees. The collection and sharing of data and data services enables transportation stakeholders to improve their awareness and develop solutions to address transportation issues including safety.

FINANCIAL IMPACT

The cost of this contract, \$650,000, is included in the approved FY21 budget in cost center 3351, project 405526.

Impact to Budget

The award of the Locus license will have no impact on the budget for RIITS in FY21. RIITS is primarily funded from Prop C 25% - Streets and Highways. Securing of this license through RIITS may produce some future funding efficiencies by reducing the need for stakeholders to budget for similar licensed data.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

This recommendation supports strategic plan goal 4.1 which states, "Metro will work with partners to build trust and make decisions that support the goals of the Vision 2028 Plan". Goal 4.1 includes a guiding principle that Metro will work to build trust with partners and stakeholders across the County in the interests of sharing data and information for transparent and inclusive decision-making.

ALTERNATIVES CONSIDERED

The Board may choose not to approve this contract for a Locus license. This is not recommended as it would restrict Metro's ability to share the data and obtain the additional necessary datasets in the most cost-effective manner.

NEXT STEPS

Upon approval, staff will execute Contract No. PS74047000 with Cambridge Systematics, Inc. and move forward to secure the license, implement/integrate the license within RIITS and begin outreach and sharing with stakeholders.

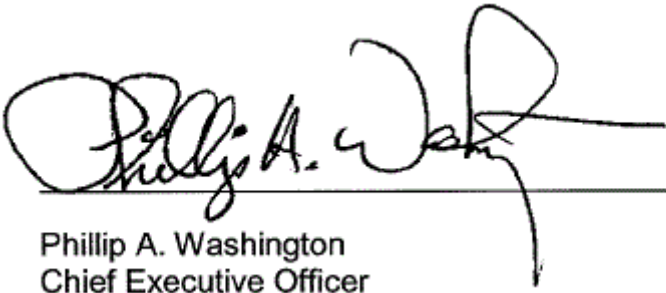
ATTACHMENTS

Attachment A - Procurement Summary

Attachment B - DEOD Summary

Prepared by: Kali K Fogel, RIITS Administrator, (213) 922-2665
Kenneth Coleman, DEO Highway Operations/Congestion Reduction, (213) 922-2951

Reviewed by: Shahrzad Amiri, Executive Officer, Congestion Reduction,
(213) 922-3061
Debra Avila, Chief Vendor/Contract Management Officer,
(213) 418-3051



Phillip A. Washington
Chief Executive Officer

PROCUREMENT SUMMARY

LOCUS LICENSE PURCHASE/PS74047000

1.	Contract Number: PS74047000	
2.	Recommended Vendor: Cambridge Systematics, Inc.	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input checked="" type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	Procurement Dates:	
	A. Issued: March 31, 2021	
	B. Advertised/Publicized: N/A	
	C. Pre-Proposal Conference: N/A	
	D. Proposals Due: April 1, 2021	
	E. Pre-Qualification Completed: In process	
	F. Conflict of Interest Form Submitted to Ethics: April 30, 2021	
	G. Protest Period End Date: N/A	
5.	Solicitations Picked up/Downloaded: 1	Bids/Proposals Received: 1
6.	Contract Administrator: Ernesto DeGuzman	Telephone Number: (213) 922-7267
7.	Project Manager: Kali Fogel	Telephone Number: (213) 922 2665

A. Procurement Background

This Board Action is to approve sole source Contract No. PS74047000 issued to Cambridge Systematics, Inc. for Locus software license and maintenance services.

A Request for Proposal was issued on March 31, 2021 in accordance with Metro's Acquisition Policy for sole source procurements and the contract type is firm fixed price. A goal of 3% SBE and 3% DVBE was assigned to this procurement.

The proposal was received from Cambridge Systematics, Inc., on April 1, 2021.

B. Evaluation of Proposal

The proposal was evaluated by staff from LA SAFE's Highway Operations Department.

The proposal was evaluated for technical and financial merit, proposer experience and expertise, and understanding of the services to be provided. The proposal was deemed responsive and the evaluation determined that Cambridge Systematics could perform the service.

Qualifications Summary of Proposer

Cambridge Systematics, Inc. provides strategic planning and management services, objective analysis and technology applications for passenger, commercial, freight and transit systems in the public and private sectors.

C. Price Analysis

The recommended price of \$650,000, while \$165,000 over Metro's independent cost estimate (ICE) of \$485,000, is determined to be fair and reasonable.

Proposer Name	Proposal Amount	Metro ICE	Negotiated Amount
Cambridge Systematics, Inc.	\$650,000	\$485,000	\$650,000

The ICE was based on staff's best projection of the cost of licenses based on the purchase of licenses in 2020. However, only a handful of limited licenses were purchased at that time. Under this procurement, Metro needs to purchase a larger number of unlimited licenses so that they may be used by all agencies who need to access data in the Regional Integration of Intelligent Transportation Systems (RIITS).

D. Background on Recommended Contractor

Cambridge Systematics, Inc, was established in 1972 and provides consultancy services, including technology applications, to the public transportation industry domestically and abroad. Its client base includes the Federal Transit Administration, the American Public Transportation Association, and the California Department of Transportation.

DEOD SUMMARY

LOCUS LICENSE PURCHASE / PS74047000

A. Small Business Participation

The Diversity and Economic Opportunity Department (DEOD) established a 3% Small Business Enterprise (SBE) and 3% Disabled Veteran Business Enterprise (DVBE) goal for this solicitation. Cambridge Systematics, Inc. exceeded the goal by making a 4.91% SBE and 3.49% DVBE commitment.

Small Business Goal	3% SBE 3% DVBE	Small Business Commitment	4.91% SBE 3.49% DVBE
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	SBE Subcontractors	% Committed
1.	Redhill Group, Inc.	4.91%
	Total SBE Commitment	4.91%

	DVBE Subcontractors	% Committed
1.	Virtek Company	3.49%
	Total DVBE Commitment	3.49%

B. Living Wage and Service Contract Worker Retention Policy Applicability

The Living Wage and Service Contract Worker Retention Policy is not applicable to this contract.

C. Prevailing Wage Applicability

Prevailing wage is not applicable to this contract.

D. Project Labor Agreement/Construction Careers Policy

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract. Project Labor Agreement/Construction Careers Policy is applicable only to construction contracts that have a construction contract value in excess of \$2.5 million.



Board Report

File #: 2021-0203, File Type: Plan

Agenda Number: 38.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: CALIFORNIA STATE TRANSPORTATION AGENCY - CLIMATE ACTION PLAN FOR TRANSPORTATION INFRASTRUCTURE

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

CONSIDER transmitting Climate Action Plan for Transportation Infrastructure (CAPTI) comment letter (Attachment A) to the California State Transportation Agency.

ISSUE

The Los Angeles County Metropolitan Authority (Metro) has engaged with the California State Transportation Agency (CalSTA) in their development of the draft Climate Action Plan for Transportation Infrastructure ([CAPTI <https://calsta.ca.gov/-/media/calsta-media/documents/capti-2021-calsta.pdf>](https://calsta.ca.gov/-/media/calsta-media/documents/capti-2021-calsta.pdf)), which will implement Governor Newsom's Executive Orders (EOs) on Climate Change. These EOs, [N-19-19 <https://www.gov.ca.gov/wp-content/uploads/2019/09/9.20.19-Climate-EO-N-19-19.pdf>](https://www.gov.ca.gov/wp-content/uploads/2019/09/9.20.19-Climate-EO-N-19-19.pdf) and [N-79-20 <https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf>](https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf) rest on the foundation of climate legislation such as AB 32 (2006), SB 375 (2008), and SB 743 (2013), as well as Governor Brown's EO B-30-15 (2015). EO N-19-19 calls for actions to reduce greenhouse gas (GHG) emissions by leveraging discretionary state transportation funds. EO N-79-20 requires state transportation agencies to identify near-term actions and investment strategies to improve clean transportation, sustainable freight, and transit options.

BACKGROUND

On September 20, 2019, Governor Newsom issued EO N-19-19 which calls for actions from multiple state agencies to reduce greenhouse gas (GHG) emissions and mitigate the impacts of climate change. This EO includes a direct acknowledgement of the role the transportation sector must play in tackling climate change. Specifically, the EO acknowledges that California has ambitious climate goals to transition to a healthier, more sustainable economy, including reducing GHGs 40% below 1990 levels by 2030. Although substantial progress has been made in recent years, direct emissions from cars, trucks, ships, diesel trains, airplanes, and other transportation sources have remained a driver of GHG emissions, totaling 40.1 percent statewide.

The EO directs CalSTA to leverage state funding programs where the State plays a role in scoping,

recommending or selecting projects to further the implementation of the transportation vision. State funding programs include:

- Active Transportation Program (ATP)
- Interregional Transportation Improvement Program (ITIP)
- Local Partnership Program (LPP)
- Solutions for Congested Corridors Program (SCCP)
- State Highway Operations & Protection Program (SHOPP)
- Trade Corridor Enhancement Program (TCEP)
- Transit & Intercity Rail Capital Program (TIRCP)

Since the release of the EO, much has changed in California and across the world. California now finds itself in a recession and a pandemic, both of which have significantly impacted transportation system needs and funding. Many agencies have embarked upon new efforts to examine transportation investments relative to equity impacts. New policies on equity in the Draft CAPTI are an example of the initial results of these efforts.

CalSTA has acknowledged that the current COVID-19 crisis is a fluid situation and will continue to evaluate assumptions and strategies as they develop the Action Plan. Implementation of this Action Plan is scheduled to begin upon finalization of the plan in the summer of 2021.

DISCUSSION

CalSTA, through multiple working group meetings and webinars, developed and released the first draft of the CAPTI investment strategies in June 2020, and the Draft CAPTI on March 10, 2021. Under the draft plan, the State will invest discretionary transportation funds in sustainable infrastructure projects that align with its climate, health and social equity goals. To steer those investments the draft plan has 10 guiding principles:

1. Building toward an integrated, statewide rail and transit network
2. Investing in networks of safe and accessible bicycle and pedestrian infrastructure
3. Including investments in light-, medium- and heavy-duty zero-emission vehicle infrastructure
4. Strengthening the commitment to social and racial equity by reducing public health and economic harms and maximizing community benefits
5. Making safety improvements to reduce fatalities and severe injuries of all users toward zero
6. Assessing physical climate risk for transportation infrastructure projects
7. Promoting projects that do not substantially increase passenger vehicle travel
8. Promoting compact infill development while protecting residents and businesses from displacement
9. Developing a zero-emission freight transportation system
10. Protecting natural and working lands.

Interdepartmental Review and Input

The draft plan's Investment Framework also includes recommended strategies and actions to

address these principles. Planning staff held and attended several meetings with impacted departments/agencies within and outside of the agency to secure input on areas of interest. Staff used this input to respond to a CalSTA survey and participate in several statewide workshops. As a result of Metro's and other agencies' comments, CalSTA made some helpful refinements to the Investment Framework. Planning staff is generally pleased with the progress CalSTA has made to refine the draft CAPTI. Specifically, the plan now recommends accelerating TIRCP funds for vitally important funding for zero-emission buses to support a statewide fleet transition. Additionally, equity provisions are now included in multiple areas of the plan, and in increased detail.

Metro supports CalSTA's vision for funding and implementing infrastructure for zero-emission freight vehicles, which is in alignment with the ultimate goal of Metro's 710 Clean Truck Program. Metro will seek support from CalSTA, regional stakeholders and the federal government to implement the necessary interim step of replacing diesel trucks with near-zero emission, low-NOx trucks to support Metro's near-term air quality and equity goals for the I-710 corridor communities, disadvantaged communities adjacent to freight-intensive highway corridors and facilities and the region at large.

Freight projects on the highway system also deserve special attention for state investment. Through an aggressive funding plan for cleaner truck technology, the State can mitigate climate change and public health issues related to highway capacity projects that may increase truck vehicle miles traveled (VMT). Metro notes that it is important to recognize California's goods movement system's dependence on trucks to move the lion's share of goods between facilities, businesses and homes and the need to provide greater access to infrastructure and cleaner technology.

Metro believes that the State should commit to an ongoing, dedicated, robust funding source to support the conversion of heavy-duty vehicles-specifically buses and trucks-to cleaner alternatives to support LA County's effort to recover economically in a sustainable and equitable manner.

Additionally, on the highway side, Metro supports policies and strategies for the reduction of vehicle miles traveled (VMT). In this area, the new draft introduces the concept of a VMT Bank. Staff looks forward to working with the California Transportation Commission (CTC) on the details for this concept that will make the transportation funding programs work with VMT reduction policies. In addition, we appreciate the draft's recognition of the importance of roadway improvements such as Express Lanes that increase bus speeds and produce revenue to support VMT-reducing modes of transportation. Our recommendation in this area is to assure that these facilities are recognized as supporting person throughput, while encouraging commuters to opt out of congestion, which contributes to emissions.

CAPTI also recommends advancing a discussion relating to priced managed lanes as a congestion reduction tool. This is a significant opportunity to advance the use of pricing in our State and CAPTI could help to advance the use of this tool. As this effort progresses it is also important to ensure that roles and responsibilities in pricing systems are clear. Where local agencies bear the financial liability in developing and implementing pricing systems, it is important to ensure that local decision making is maintained for all aspects of the program. This includes local flexibility to make decisions regarding the operation of pricing systems to ensure that the programs can maintain optimal operating conditions.

Overall, staff appreciates CalSTA's leadership in the development of the draft CAPTI. We feel that our programs are well-aligned with the CAPTI and feel confident that we can work within it to partner successfully on a slate of projects to benefit local communities, while supporting the state's effort to meet its important climate and equity goals. Metro looks forward to working with the State to realize the issues raised in the the goods movement area and to have more detailed discussions on roadway pricing and VMT management. We recommend sending the letter (Attachment A) to CalSTA to emphasize Metro's position.

Equity Platform

Transmittal of the comment letter will address Pillar III - Focus and Deliver of the Equity Platform. The CAPTI will support sustainable infrastructure projects that align with the shared climate, health and social equity goals of the State and Metro. As the CAPTI will guide ongoing and future partnerships between the State and Metro, it is important to communicate our comments of support and concern to ensure that actions and projects carry out Equity Platform objectives.

DETERMINATION OF SAFETY IMPACT

The requested actions will have no direct impact on the safety of our customers or employees. However successful engagement with CalSTA may ensure funding for important projects across Los Angeles County that support pedestrian, bicycle, transit and motorized vehicle safety including elements of the I-710 Corridor Project, a key goal of which is to improve safety.

FINANCIAL IMPACT

The requested action will have no impact to the FY 22 budget. However, working closely with CalSTA on the Draft Investment Framework for transportation investments can result in enhanced funding to support Metro's key priorities and initiatives.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

The recommended actions fulfill Strategic Plan Goal 4 by partnering with regional and state partners to develop transformative plans or policies to address transportation funding challenges and investment issues throughout the state.

The CAPTI may help implement some of the elements of other key Metro plans, such as the Sustainability Plan and the Draft Highway Programs Modernization Plan. For instance;

- Emissions and Pollution Control Target 1 of the Sustainability Plan is to transition Metro's fleet to zero emissions technology. CAPTI's Strategy 2.3 is to accelerate Cap and Trade Cycles to support the deployment of ZEV/rail fleets and transit/rail network improvements.
- Resilience and Climate Adaption Target 2 of the Sustainability Plan directs staff to incorporate climate adaptation into planning, procurement, asset management and operations by 2025,

using the flexible adaptation pathways concept. CAPTI's Strategy 5.2 may help as it requires updating transportation infrastructure competitive program guidelines to incentivize climate adaptation and climate risk assessments/strategies.

Likewise, the CAPTI and the draft Metro Highway Modernization Plan are aligned in some key areas.

- The Draft Highway Programs Modernization Plan Attachment A emphasizes improvement of traffic flow and reduction of recurring traffic. CAPTI's Strategy 1.1 prioritizes Solutions for Congested Corridors program projects that enable travelers to opt out of congestion as well as prioritizing transportation solutions that focus on reducing VMT.
- The attachments of the Highway Programs Modernization Plan identify bikeways, sidewalk, improvements and pedestrian safety improvements as eligible Highways Program projects for Measures R and M while CAPTI's Strategy 2.4 is to increase funding to the California Active Transportation Program, which provides funding for bicycle and pedestrian projects.

These are a small sample of the areas of alignment of the CAPTI with Metro plans and policies.

ALTERNATIVES CONSIDERED

The Board could choose not to approve the requested recommended action to transmit the attached comment letter to CalSTA. However, by doing so this would be a missed opportunity for Metro to highlight areas of concern and influence transportation funding policies related to goods movement and highway projects.

NEXT STEPS

Upon approval of the recommendation, staff will work with CalSTA according to the following schedule to follow the draft plan through the finalization and implementation:

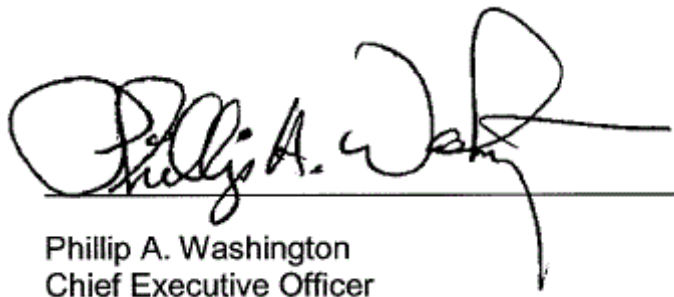
- Submit comment letter to CalSTA (May 30 deadline)
- Targeted Adoption and Release of Final Action Plan in June 2021
- Submittal Plan to the Governor and Legislature by July 15

ATTACHMENTS

Attachment A - CAPTI Comment Letter

Prepared by: Dominica Smith, Manager, Countywide Planning & Development, (213) 922-2795
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ATTACHMENT A

May 27, 2021

David S. Kim, Secretary
California State Transportation Agency
915 Capitol Mall, Suite 350B
Sacramento, CA 95814

RE: LA Metro Comments Regarding Draft Climate Action Plan for Transportation Infrastructure

Dear Secretary Kim:

The Los Angeles County Metropolitan Transportation Authority (LA Metro) is deeply committed to improving mobility, equity, public health and quality of life for LA County residents. As the state's most populous county with the busiest seaport complex, we recognize that our work implementing transportation projects, programs and technologies will play a vital role in the state realizing its climate goals, and we appreciate the state's support in driving investment into LA County to leverage local funds and to improve the way we move people and goods.

LA Metro very much appreciates your leadership at the California State Transportation Agency (CalSTA), especially in leading the important collaborative dialogue to develop policies increasing accessibility, improving air quality and combating climate change. LA Metro stands ready to partner with the state to attain these mutual outcomes, and we are pleased to submit the following comments on the Draft Climate Action Plan for Transportation Infrastructure (CAPTI) released on March 10, 2021.

LA Metro supports the goals and vision of the CAPTI and welcomes several updates to the preliminary draft plan materials. First and foremost, we appreciate the proposed increase of vitally important funding for zero emission public transit vehicles as part of an accelerated Cap-and-Trade Program. This funding will help advance Metro's initiative to transition the agency to a 100 percent zero emission bus fleet by 2030. We would further urge the state to commit to dedicated and ongoing funding to replace all heavy duty non-zero emission transit vehicles with zero emission technology as soon as possible.

LA Metro compliments CalSTA's efforts and success in identifying some of the many ways that equity must be directly addressed within the actual strategies of the plan. As a leader in implementing equity into its policies and programs, Metro supports the principles of diversity, equity and inclusion in transportation investment decisions, and looks forward to working with you to help identify areas of improvement so we can achieve safe and equitable access to opportunity for all Californians. To that end, we also look forward to working with you to identify funding to increase the resources available for the Active Transportation Program among other programs designed to support these important goals.

LA Metro supports the efforts identified in the CAPTI to expand the use of priced managed lanes in California. As this effort proceeds, we urge the State to recognize two important principles that should be respected in existing and future pricing programs and policies. First, when local agencies sponsor projects, they are also responsible for the financing of those projects; therefore, the responsibilities of the local agency with respect to the management of toll revenues should be preserved. Second, the local agencies that

manage these programs should retain local authority to make decisions relating to the operation of the pricing systems.

LA County's—and the state's—economic recovery from COVID-19 will depend heavily on the efficient, sustainable, and equitable movement of goods through the Ports of LA and Long Beach and between regional manufacturing, logistics and distribution facilities, and to local businesses and homes. Diesel-powered freight vehicles have arguably the greatest impact among mobile sources on climate outcomes, thus they are perhaps the most critically important components of the capital landscape to transform immediately. LA Metro supports an expedited transition to a zero-emission freight future, particularly opportunities to invest in infrastructure necessary to support future usage of zero-emission freight vehicles. Our I-710 Clean Truck Program seeks to implement a progressive transition to zero-emission technology, which includes an important interim step of replacing existing Class 8 diesel trucks with available low-NOx, near-zero emission technology to address equity, air quality and public health needs for LA County today. According to our 2021 Goods Movement Strategic Plan, the health effects associated with exposure to diesel truck emissions exacerbated the impacts of COVID-19 and created greater rates of morbidity. Taking an aggressive approach—both for the interim near-zero approach and the ultimate zero-emission solution to replacing diesel trucks—to improving the climate will help LA Metro achieve greater public health for LA County residents, many from disadvantaged and minority communities that live along major goods movement highway corridors.

LA Metro also supports strategies and policies to reduce Vehicle Miles Traveled (VMT). We appreciate CalSTA's recognition of the importance of roadway improvements that increase bus speeds and that generate revenue to support VMT-reducing modes of transportation, such as priced, managed lanes (ExpressLanes in LA County). Metro staff looks forward to working with the California Transportation Commission (CTC) on the details of the proposed VMT bank, which is an important concept that will make the transportation funding programs workable. We appreciate this recognition and we further recommend that these ExpressLanes facilities be recognized as supporting person throughput and encouraging commuters to opt out of congestion.

On behalf of LA County I thank and commend you and your staff for the excellent effort and transparency that you have used to develop the Draft CAPTI. We look forward to working with you and the CTC to finalize and implement this transformative plan.

Should you have any questions about these comments, please contact Wil Ridder, LA Metro's Executive Officer for State/Federal Policy and Programming at ridderw@metro.net or 213-922-2887.

Sincerely,

Phillip A. Washington
Chief Executive Officer




Climate Action Plan for Transportation Infrastructure (CAPTI)

Executive Management Committee

May 20, 2021



Metro



A Brief History

- Over the past 10 years, State policies around transportation and the environment have become more intertwined.
- Transportation generates the largest sector of greenhouse gas emissions (GHG) in the State of California.
- If the State is going to reduce GHG, transportation has to be a component.
- Transportation decisions don't happen in a vacuum.
- Land use decisions are also a factor.

General Policy and Legislative Framework

- Global Warming Solutions Act of 2006 (AB 32)
- SB 375 (2008)
- SB 743 (2013)
- Cap and Trade
- N-19-19 (Newsom) directs California State Transportation Agency (CalSTA) to leverage discretionary funds to meet state climate goals
- N-79-20 (Newsom) directs all cars in the state to be zero emission by 2035 and trucks to be zero emission by 2045

Where Are We Today?

- SB 743 is being implemented – many of our highway projects were started before the timeframes in Caltrans' requirements but future ones will undergo new scrutiny
- SB 261 (Allen) – would implement recommendations of the SB 150 report and could impact our planning processes and projects. California Air Resources Board is considering clean truck rules
- Legislature is considering funding for ZEB efforts
- CAPTI - In March 2021, CalSTA issued its draft plan outlining its vision for the California Transportation Commission leveraging its discretionary funding programs to implement the Governors' Executive Orders.



Metro

The CAPTI Investment Framework – Seven Strategies

1. Cultivate and accelerate sustainable transportation innovation by leading with state investments
2. Support a robust economic recovery by revitalizing transit, supporting ZEV deployment, and expanding active transportation investments
3. Elevate community voices in how we plan and fund transportation projects
4. Advance state transportation leadership on climate and equity through improved planning & project partnerships
5. Support climate resilience through transportation system improvements and protections for natural and working lands
6. Support local and regional innovation to advance sustainable mobility
7. Strengthen transportation-land use connections

Metro's Priorities Align with CAPTI

- Increased funding for transit and active transportation
- New and accelerated funding for zero-emission transit vehicles
- Emphasis on zero-emission freight infrastructure
- Highways - overall emphasis on reducing vehicle miles traveled (VMT) and positive messaging on priced managed lanes
- Measures to improve equity and address displacement

Key Metro Comments on CAPTI

- Funding for zero-emission bus acquisition and charging infrastructure
- Clean freight expansion that includes funding for trucks and fueling infrastructure that supports and interim step of using near-zero technology
- Continued partnership in funding Express Lanes with focus on developing a comprehensive pricing authorization that maintains regional/local sponsors' operational decision-making
- Support for reducing VMT



Board Report

File #: 2021-0336, **File Type:** Informational Report

Agenda Number: 39.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: FARELESS SYSTEM INITIATIVE

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

Adopt the Fareless System Initiative Pilot Program.

- A. Approve a twenty-three (23) month Fareless System Initiative Pilot; cost-sharing negotiations are underway
- B. Authorization of three Full Time Employee (FTE) positions: one Deputy Executive Officer and two support FTE; staff will be housed in the Office of the CEO; additional staffing needs to be assessed going forward.

ISSUE

Metro staff seeks approval of a proposed 23-month Fareless System Initiative Pilot. The proposed pilot would 1) offer fareless transit to students grades K-12 as well Community College students starting in August 2021, (cost-sharing negotiations are underway), and 2) would expand to include qualified low-income riders starting on January 1, 2022, for which additional funding will be sought and a final funding plan will be developed. The pilot would conclude on June 30, 2023 for all participants. At the conclusion of the pilot, the Board may consider extending, modifying, or discontinuing fareless service.

BACKGROUND

In September 2020, the Metro CEO initiated the Fareless System Initiative (FSI) Task Force to embark on an intensive process of studying and identifying facts, challenges, opportunities, and recommendations related to eliminating fares on Metro buses and trains. The FSI Task Force has collected internal and external feedback through fact-finding and coordination to:

- Evaluate internal processes related to ridership projections, data collection, fare collection, financial considerations, funding opportunities, cost savings and potential labor impacts
- Assess the overall impact to the customer experience, including security, homelessness, operational capacity, and readiness
- Evaluate connections and ensure alignment with other agency-wide initiatives such as Metro's

Vision 2028, Traffic Reduction Study, NextGen Bus Improvements, Better Bus Initiative, Equity Platform Framework, and Customer Experience Plan

- Assess how a fareless system could operationalize equity in LA County and benefit both low-income and student riders
- Convene internal working groups with members of Metro's senior leadership team and designated staff to evaluate findings

The FSI Task Force also engaged in extensive external stakeholder coordination, including:

- Conducting a county-wide survey where over 46,000 responses were received - 86% of current Metro riders surveyed support free transit and 80% of non-riders support free transit
- Convening an Ad Hoc Committee to collect direct feedback and insight from the county's municipal operators that share Metro's fare collection system, as well as Access Services (paratransit) which also serves LA County
- Providing updates and incorporating feedback from regional partners, stakeholders, Metro's Faith Leaders Roundtable, and advisory sub-committees
- Conducted at Telephone Town Hall, a live forum to discuss the exploration of FSI

Why Fareless?

A fareless transit system in Los Angeles is both an investment in social mobility and an important tool to assist in the fight against income inequality. In 2019, almost 70% of Metro ridership were low-income (defined by the U.S. Department of Housing and Urban Development as approximately 70% of annual median area income). For students, access to transit increases the probability of students becoming long-term transit riders, improves school attendance and academic performance, increases participation in extracurricular activities and employment, increases transit ridership, adds social and environmental benefits to the LA region, and possibly offset loss in transit ridership due Transportation Network Companies (TNCs). A fareless system makes Metro more accessible while providing some financial relief from the ever-rising cost of living on the working poor in Los Angeles County. Transportation is a basic need for the Los Angeles region. Access to reliable transportation is crucial to maintaining stable employment, reaching educational opportunities, caring for family, and staying healthy.

Fares account for an estimated thirteen percent (13%) of Metro's operating costs, and approximately 1/3 of those costs are spent paying for the fare collection system (i.e., fare collection, fare enforcement, accounting, administration, fare box repair and maintenance). A fareless system has the potential to substantially reduce these fixed costs and redirect these resources to the benefit of the traveling public and the agency.

Currently, Metro requires on-board fare payment on all bus routes. Eliminating fare collection will also lead to faster and more efficient boarding of buses, by eliminating dwell time delays due to fare loading, cash collection issues, and fare disputes. This will help address a frequently heard complaint about transit: it's not as fast as driving. Speeding up transit trips will make transit more appealing, which is important in a county where most people drive. Lastly, the customer experience for Metro riders is a priority that will be improved with a more reliable transit system.

Metro Bus Operators play a critical role in the safety of the traveling public, navigating challenging road conditions in the urban environment, while serving in hard-to-fill positions. In an analysis of

National Transit Database information, the FTA found that the most likely causes of assaults on bus operator is fare disputes (44%). Removing fare payment requirements removes this source of conflict.

Fareless transit can also advance equity and improve life outcomes by removing the financial barrier to access to opportunity. Metro's Board of Directors has adopted the Equity Platform Framework to prioritize funding, planning and policy decision-making to address equity disparities across Los Angeles County and the region. "Increased prosperity for all by removing mobility barriers" is one of the three elements of Metro's Board-adopted Vision 2028 Strategic Plan. Implementation of a fareless system operationalizes equity.

Implementation of a fareless transit system, in the largest county in America, is unprecedented in scale and would be the largest fareless effort in the world. The proposed pilot is a broad, yet controlled effort that can provide economic relief to those who need it most. With up to 70% of Metro ridership low-income and eligible to participate in the pilot, the pilot provides an opportunity for a detailed and empirical assessment of ridership forecasts; financial, operating, and security assumptions; and the uncovering of unanticipated issues and testing of solutions. A Fareless System Initiative at this scale provides the opportunity to assess demand, and to identify adequate response and assign adequate resources.

Context

As Los Angeles County and the nation begin to emerge from the COVID-19 pandemic staff consider the following:

- The pandemic has delivered a huge economic hit, especially to low-income residents of Los Angeles County.
- County unemployment remains high, at nearly 11%, and disproportionately affects people of color and low-income residents.
- Students return in August 2021 to in-class instruction, after over a year of distance learning
- Daily ridership is about half of the 1.2 million daily boarding Metro served in 2019.
- Metro's Board of Directors recently directed that bus and rail service return to pre-pandemic levels by this September 2021, thus providing ample capacity for returning and new riders.
- Vaccinations are now available to all adults, so a safe return to transit is possible.
- Congress is considering new legislation to support fareless transit initiatives around the country.

Recognition that transit is a critical contributor to environmental solutions has never been higher. Through FSI, Metro can connect all these factors in a bold and visionary way by providing a timely economic boost to those who need it most; by moving aggressively to fill up buses and trains that have adequate capacity and to do so safely; and by being first in the nation with a carefully developed fareless pilot program, thus putting Metro at the top of the list for possible and permanent Federal financial assistance. This is the right time to carry out a fareless pilot at Metro.]

DISCUSSION

Findings

Pilot Initiative Development

Over the last eight months, the FSI Task Force has worked to identify how Metro could feasibly adopt a fully fareless system. Challenges related to funding, operations, infrastructure, and regional impacts to transit providers were identified. Several unknown factors, including how and when customers would return to mass transit, create uncertainty, and underscore the need for a pilot.

To test the feasibility of a fareless system, the FSI Task Force proposes beginning with a gradual implementation pilot. The scope of the pilot was based on supporting equity, customer experience, financial stability, operations, security, and data collection. From this research, a clear leading concept emerged - an 18-month pilot - which allows for a more detailed and empirical assessment of our forecasted assumptions. In consideration of the return to in-class learning in August 2021, and to offset the disproportionate economic impacts of the COVID-19 pandemic on low-income residents, members of the Metro Board of Directors requested that the scope of the pilot be expanded to a 23-month pilot to accommodate an earlier start for students.

This proposed 23-month pilot employs an incremental approach, beginning with K-12 and Community College in August 2021, and offering/extending the scope to include low-income riders on January 1, 2022. The pilot would conclude on June 30, 2023. This approach allows Metro to observe increases in ridership and gauge resource demands to more accurately forecast the true cost of a fully fareless system.

The pilot program would allow Metro to assess a fareless system in the unique context of Los Angeles County. During the pilot, equity, customer experience, impacts to local transit providers, ridership surges and agency resource demands will be assessed while financial partnerships and adequate long-term funding will be sought, while providing immediate economic relief to student and low-income riders. The assessment of the pilot concept viability is summarized later in this report.

Stakeholder Outreach

Throughout the course of the initiative, the FSI Task Force implemented a comprehensive communications and outreach plan that included:

- A countywide survey generated 46,300 responses, with 86% of current Metro customers supporting fareless transit and 80% of non-Metro customers also supporting fareless transit
- An Employee Survey with over 1,900 responses
- A series of presentations at Metro Service Councils and several Advisory Committees
- A Telephone Town Hall with over 5,000 participants
- Digital and earned media
- Meeting with the leadership teams of all five of Metro's Labor Unions (SMART, ATU, AFSCME, TCU and the Teamsters)
- Convening the FSI Ad Hoc Committee comprised of representatives from municipal and local transit operators

Through this engagement, the Task Force has listened to and learned from a variety of stakeholders. The most common comments include:

- Concerns about people experiencing homelessness increasing their use of riding the system if

- no fares are enforced, a greater lack of security, and potential increases in crime
- Concerns about service capacity, cleanliness, and taxes/paying for other people's fares
- Support for the program due to equity, economic recovery, and easing traffic
- Support for a fully fareless system
- Requests for college students, seniors, and people experiencing disabilities to be included in the potential pilot

Members of the FSI task force, the offices of the Metro Chair and Vice Chair, and Metro staff also met with more than 70 representatives of governmental and non-profit Community Based Organizations (CBOs) that participate in the Low-Income Fare is Easy (LIFE) program, with a focus on those that assist refugees and undocumented families and individuals. The meeting provided the opportunity for the CBOs to learn more about potential FSI options and Metro's work to streamline registration for LIFE and Reduced Fare program participants and discuss opportunities to avoid multiple registration processes.

The CBOs suggestions included: reducing language and literacy barriers; conducting more extensive outreach efforts and updated marketing literature; providing more widespread access to applications; and educating the public of the availability of the programs and methods of access. Although the LIFE program has a wide list of options available for means testing, they requested even an even wider range of options and the potential for self-attestation. Also discussed was the continuation of current LIFE family enrollment procedure that once a head of household qualifies, then all members of that household can and/or will be automatically enrolled.

Should the Board approve the inclusion of low-income individuals within the FSI pilot, staff will form a LIFE/Social Services Task Force to address specific recommendations, procedures, and enrollment training for participating CBO's. Many of the agencies that participated in the meeting are willing to assist with pilot enrollment.

Ridership - Who Will Ride

To better approximate the potential increase in ridership for Metro and municipal and local operators in LA County, Metro's travel demand model was used to develop projections and to test scenarios. Based on the model projections for a fareless pilot, limited to low-income riders and students, over the course of the 23-month pilot, system-wide ridership could increase by up to seventeen percent (17%) above the baseline average daily ridership estimated for that period, depending how widely utilized the program is. Similar increases would be expected for municipal and local operators, should they decide to participate in the pilot.

Considerations

Operational Considerations

Implementation of a fareless system supports Metro's vision of providing world class service that is safe, customer-focused, equitable and efficient. Metro's current operations plan already mandates the reinstatement of service hours that were reduced at the start of the County's Safe at Home Order, including the hiring of additional bus operators and support staff to ensure that the newly reinstated service levels remain intact. In February 2021, the Metro Board directed staff to restore service to pre-pandemic levels, i.e., 7 million Revenue Service Hours (RSH) by September 2021. With current

ridership estimates remaining substantially below pre-pandemic levels (in March 2021 weekday boardings were 50% lower than pre-pandemic boardings in March 2019), the agency can accommodate potential ridership increases generated by implementation of a fareless pilot without the need for additional increases to service hours or staffing beyond the current operations plan. Throughout the pilot, ridership and the customer experience will be closely monitored to determine if additional resources are needed.

Local and Municipal Transit Operators and Access Services Concerns

As part of the FSI initiative, Metro CEO Phillip A. Washington convened the Fareless System Initiative Ad Hoc Committee. The committee is comprised of thirteen self-selected transit agencies, representing local and municipal transit operators from within Los Angeles County. Representatives from the Los Angeles County Municipal Operators Association (LACMOA), the Local Transit Systems operators (LTS), and Access Services met on a weekly basis throughout fall 2020 and resumed meetings in the spring of 2021. The goal of the committee was to uncover challenges and seek solutions that could inform decision-making by local transit agencies and operators regarding FSI. Committee discussions centered on the merits and challenges of a fareless system including equity, funding, ridership projections, concerns regarding PEH, public safety, Title VI considerations, and implications to paratransit.

The concerns expressed by the FSI Ad Hoc Committee are summarized as follows:

Funding - Many of the other operators are concerned about launching a pilot without knowing the source of long-term funding. Without a commitment of long-term state and/or federal funding assistance, the Metro Board may need to halt the Initiative at the conclusion of the pilot.

Existing Community College Programs - Unwinding existing college funded cost-sharing fare programs is a major risk - many agencies receive a portion of total fare revenue from agreements with academic institutions. Agencies were most open to a pilot for K-12 riders only, as it would not unravel existing funding agreements with colleges. These agencies believe that having replacement funding for these programs should be a pre-condition for operators to participate in the pilot. Per the Transit Operator Survey issued in April 2021 and detailed below (and further detailed in Attachment A), nine (9) agencies of the nineteen (19) agencies that responded, reported annual Community College agreements ranging from \$15,242 to \$1,258,000. The combined, annual value of contracts for all nine agencies is \$3,568,373.

Measuring Success - Goals of the program should be clearly reflected in the pilot evaluation criteria. Recovering from COVID-19 has required a special funding increase to get people back on transit; equity is a longer-term goal compared to pandemic recovery alone and requires long-term funding. There's interest in better understanding the potential unintended consequences of Metro's pilot on all other operators in the region and incorporating some into the program's evaluation. To that end, Municipal and Local Operators would like to be involved in measuring the success of the program. Staff welcomes this involvement and will continue to have these discussions with the FSI Ad Hoc Committee and other operators.

Scope of Pilot - Low-income riders may be too large of a group for a pilot. Impacts of a student pilot would be easier to track (e.g., through school attendance records).

Access Services - Access Services has distinct regulatory considerations. Based on existing federal regulations, Access Services cannot charge more than double of Metro's base fare. For the proposed FSI Pilot, given that Metro will maintain a base fare of \$1.75 for non-low-income riders, a change in Access Services fare structure is not legally required. If Metro were to implement a fully fareless system, Access Services would be required to go fareless. It should also be noted that Access customers, as part of the Free Fare program, have long been able to ride for free on most Los Angeles County fixed-route systems. This program has been successful at offering mobility options to our customers while substantially reducing demand on the paratransit system. In FY19, Access customers took 26.6 million free fare trips on the fixed-route system.

Local and Municipal Transit Operator Surveys

In addition to the FSI Ad Hoc Committee, which has convened over 15 meetings since October 2020, in April 2021 the FSI Task Force invited all transit operators within Los Angeles County to comment on FSI via survey. The survey was distributed through the Los Angeles County Municipal Operators Association (LACMOA), the Bus Operations Subcommittee (BOS), the Local Transit Systems Subcommittee (LTSS), and the FSI Ad Hoc Committee, and reminder emails were also sent. The survey was open for ten business days, and nineteen responses were received (41% response rate). There are approximately 46 fixed route bus operators in Los Angeles County.

Of the nineteen (19) survey results received, three (3) agencies expressed willingness to participate; two (2) agencies did not wish to participate; and fourteen (14) agencies responded 'other' and indicated that participation was subject to the decision of their governing body and expressed concern for long-term funding. Nine agencies reported having existing cost-sharing agreements with educational institutions that may be impacted due to the pilot. These agreements range in annual value from \$15,242 to \$1,258,00 and totaled \$3,568,373 annually for all nine agencies. Also revealed through the survey is the average FY19 farebox recovery for agencies was 12.3%, slightly lower than Metro's FY19 farebox recovery of 12.9%. Additional survey results are available in Attachment A. Discussions are ongoing with municipal and local transit operators regarding pilot participation, pilot costs, and cost-sharing.

Students

Metro staff has been working with school districts to create a detailed implementation plan that can be rolled out countywide. In preliminary discussions with other transit operators in the county through the Ad Hoc Committee, they have expressed support of implementing a K-12 pilot, if lost fare revenue can be replaced. However, regional transit operators did express concerns about implementing a pilot for Community Colleges, because it could have a negative effect on long-standing cost-sharing agreements that provide needed operating revenue to the agencies.

In FY19, there were approximately 64,000 K-12 Student riders, generating approximately \$27 million in fare revenue, and 30,000 college student riders generating approximately \$4.9 million in fare revenue. Based on California Department of Education statistics, 69% of total 1.4 million total K-12 Students in LA County are low-income. Based on surveys Metro's Regional Universal Student Pass (U-Pass) Program, 75% of Community College Students in LA County who ride transit are low-income.

Pilot Costs & Financial Impacts

The Task Force evaluated the financial impacts to Metro's annual budget and fiscal feasibility of implementing the pilot. An estimate of region-wide budget impacts was also prepared using a set of assumptions and by working with local and municipal operators to understand their unique financial situation. The percentage of operating costs covered by annual fare revenues is called "farebox recovery." Any portion of fare revenues lost due to implementing a pilot would need to be replaced to maintain Metro's ability to operate quality service.

Metro continues to demonstrate strong commitment to preserve all assets in a state of good repair. This is reflected in the following fiscal commitments:

- State of Good Repair commitments
- \$452 million in FY22
- \$463 million in FY23
- Better Bus Initiative commitment
- \$208m in FY22

Assumptions for Metro's Costs

- Revenue Loss - a gradual return to pre-pandemic ridership is assumed in FY22: \$73 million, i.e., 30% of FY19 fare revenue; a more robust return to pre-pandemic ridership is assumed in FY23: \$236 million, i.e., 95.5% of FY19 fare revenue
- Eligibility: all K-12 and community college students, as well as low-income riders (70% of Metro's ridership)
- Length of Pilot: 23 months for K-12 students and community colleges starting in August 2021; 18 months for low-income riders starting in January 2022.
- Program Participation: FY22=60% of low-income riders, FY23=75% of low-income riders
- Operating costs: already covered in FY22 and FY23 budget, per Metro's return to FY19 7 million Revenue Service Hours (RSH)

Assumptions for Municipal/Local Operators

- Revenue Loss - a gradual return to pre-pandemic ridership is assumed in FY22: 50% of FY19 fare revenue; a full return to pre-pandemic ridership is assumed in FY23: 100% of FY19 fare revenue
- Eligibility: same as Metro's
- Length of Pilot: same as Metro's
- Program Participation: same as Metro's
- Students - a loss of all fare revenue generated by students (approximately 8% for K-12 students and an additional 8% for community college students, based on median average from Transit Operator Survey)
- Operational costs: already covered in FY22 and FY23 budget

Considering the assumptions outlined above and additional expenses related to implementing the 23-month fareless pilot, the total estimated funding gap is \$246.4 million for Metro and \$74.7 million additional for municipal and local operators, totaling \$321.1 million.

The costs are summarized below.

Estimated Funding Gap (\$ in millions)	Proposed Pilot Program		
	FY22	FY23	Total
Metro			
Metro - K-12 Students (August 2021 - June 2023)	26.5	26.5	\$53.00
Metro Passenger Fares - Low Income (January 2022 - June 2023)	\$14.30	\$107.10	\$121.40
Metro- Community College Students (August 2021 - June 2023)	4.7	4.7	\$9.40
Additional Expenses			
Transit Service Increase	-	-	-
Administrative Costs for New Low-Income Program	2.4	1	3.4
New Data Infrastructure / Operating Costs	0.2	-	0.2
Public Outreach Costs for Pilot Period	1	2	3
Metro Pilot Subtotal	\$49.10	\$141.30	\$190.40
Defeasance for General Revenue Bonds Secured by Fares (one-time payoff of outstanding Bond balance; Metro would have paid this amount regardless of the pilot, but the pilot would require paying earlier.)	80	-	80
Bond Savings from Defeasance	-12	-12	-24
Metro Total Including Bond Defeasement	\$117.10	\$129.30	\$246.40
LA County Operators			
Regional - K-12 Students (August 2021 - June 2023) <i>Assumes 8% K-12 ridership</i>	6.3	6.3	\$12.60
Regional- Community College Students (August 2021 - June 2023) <i>Assumes 8% Community College ridership</i>	6.3	6.3	12.6
Regional Passenger Fares - Low Income (January 2022 - June 2023)	\$8.30	\$41.20	\$49.50
LA County Operators Total	\$20.90	\$53.80	\$74.70
Grand Total Estimated Funding Gap	\$138.00	\$183.10	\$321.10

Potential Offsets and Savings

(B) Budget Prioritization Opportunities	Preliminary Budget		Potential Savings		Notes
	FY22	FY23	FY22	FY23	
Efficiency Savings on Bus Rail Operating and Maintenance (O&M)	\$ 2,038.9	\$ 2,230.8	\$ (40.3)	\$ (44.3)	Recommend start with 2% reduction per year in internal efficiencies; will not impact capital projects. Will not degrade the quality of service, nor State of Good Repair*
MicroTransit Pilot Evaluation	39.6	40.7	(7.3)	(7.4)	Slowing down expansion to 9 zone until asset pilot
Assessment of SGR Program Modernization Need beyond Asset Condition Replacement	452.3	462.7	(37.6)	(37.0)	Align cashflow requirement based on actual rate of SGR after removing one-time purchases in the past such as bus buy, New Blue and etc.
**5% Agency Overhead, Administration and Support Department Cost Reduction	131.9	134.9	(6.6)	(6.7)	
Reallocate LIFE to Metro Fare Pass	13.0	13.3	(8.4)	(8.4)	Metro portion only
***Potential Savings			\$ (101)	\$ (104)	
Notes:					
*Will not impact capital projects and will not degrade the quality of service, nor State of Good Repair					
**Ongoing discussions between Operations, FSI Task Force, OMB, and OCEO					
***Ongoing pursuit of cost-sharing with Transit Operators, Community Colleges, K-12 partners, and State and Federal					
***Other funding possibilities for Board Consideration: Electrification program, advertisement revenue					
***Budget to be amended upon Board approval and will reflect cost sharing agreements					
***Reconsider allowing Metro to conform to California Air Resources Board (CARB) timeline for electrification of Metro					

Staff will amend the FY22 budget pending approval of the FSI pilot by the Metro Board of Directors. During the pilot, Metro will closely monitor pilot costs, and revenue sources, during the mid-year budget review process.

FSI Pilot Evaluation Methodology

Metro is committed to collaborating with its many stakeholders in evaluating this fareless pilot. Assisting Metro and local and municipal operators in this ongoing evaluation process will be the Eno Center for Transportation, the nation's leading transportation policy think tank. Eno, which celebrates its 100th anniversary this year, has a well-earned reputation for independent policy analysis and possesses particular strength in public transportation issues.

By any measure Metro's proposed Fareless Systems Initiative (FSI) pilot is an enormous undertaking. It is one that requires an unprecedented level of coordination between transit agencies in the Los Angeles region as well as between sectors such as education and social services. If successful, its impact would be significant. However, it is impossible to understand the effectiveness of any program without the right metrics: those qualitative and quantitative variables that need to be considered. All transit agencies are well accustomed to collecting data to measure performance, especially ridership and funding.

Given its reach and complexity, understanding the effectiveness of the FSI demands a broader approach. At the same time, the COVID pandemic upended transit services around the world and revealed that ridership is an imperfect measure of transit performance. This is because even though ridership has fallen steeply, few would argue that transit's societal value has dropped at a similar rate. Many of those reliant on transit before the pandemic continue to ride, including essential workers

without the ability to work-from-home.

As Metro's Board recognized, a framework for these metrics to evaluate FSI is needed. These metrics not only need to determine the success of an endeavor once it is over, but also to help determine if changes are needed as it progresses. These potential triggers need to be developed collaboratively with the key stakeholders in the region. An added consideration is the baseline we chose to measure FSI, such as whether we examine service prior to the pandemic, during the related downturn, or now in recovery. We propose a three-part framework for the board to consider:

Metrics relevant to riders. The primary impact of the FSI is on those who patronize the service. Traditional mobility measurements such as ridership, service quality, and safety remain paramount. We also need to understand who is using the service and whether they used it before. It is also important to investigate the effects that increased accessibility has on riders, particularly low income, or disadvantaged residents. Did school attendance increase because of the FSI? Were residents able to access jobs and economic opportunity they could not before or were they able to hold on to employment better?

Metrics relevant to operators. In addition to the benefits that accrue to riders, we also need to ensure we fully understand the effects on the transit operators in the region, including any unintended consequences. We need details about ridership levels on specific routes to understand if riders are shifting between modes and/or providers. Financial costs-such as forgone revenue-and how those costs are being shared clearly need to be measured to determine whether the program is sustainable both during the pilot period and beyond. Just as important is the impact on the safety of the workforce, especially workers in physical contact with riders such as drivers. Other metrics need to inform whether service needs to change, due to overcrowding, for example.

Metrics relevant to the region. Such a large undertaking will have effects well beyond transit providers. Since transportation is the backbone of the regional economy, the FSI is likely to have a large impact on the transportation network. For example, if FSI increases ridership there may well be service quality benefits to the roadway network. Businesses near rail stations may see increased patronage. Since vehicle tailpipes are the number one emitter of greenhouse gas emissions in the region, there is likely to be an air quality benefit. Regional institutions such as schools, medical centers, and other employment and entertainment nodes may benefit from higher transit ridership.

Staff will work with municipal and local transit operators, and with the Eno Center for Transportation, to refine evaluation metrics. These metrics will form the basis for quarterly analytic reports to the Board that evaluate trends, issues and questions that arise in the execution of the pilot.

Pilot Implementation

Pilot implementation development is underway. A full pilot implementation plan is being developed pending Board approval of the proposed FSI Pilot. An implementation team, led by a 3-person team out of the Office of the CEO and assisted by departments across the organization, will carry out the following activities, with the objective of starting the first phase of the pilot in August 2021. The following key steps will be required:

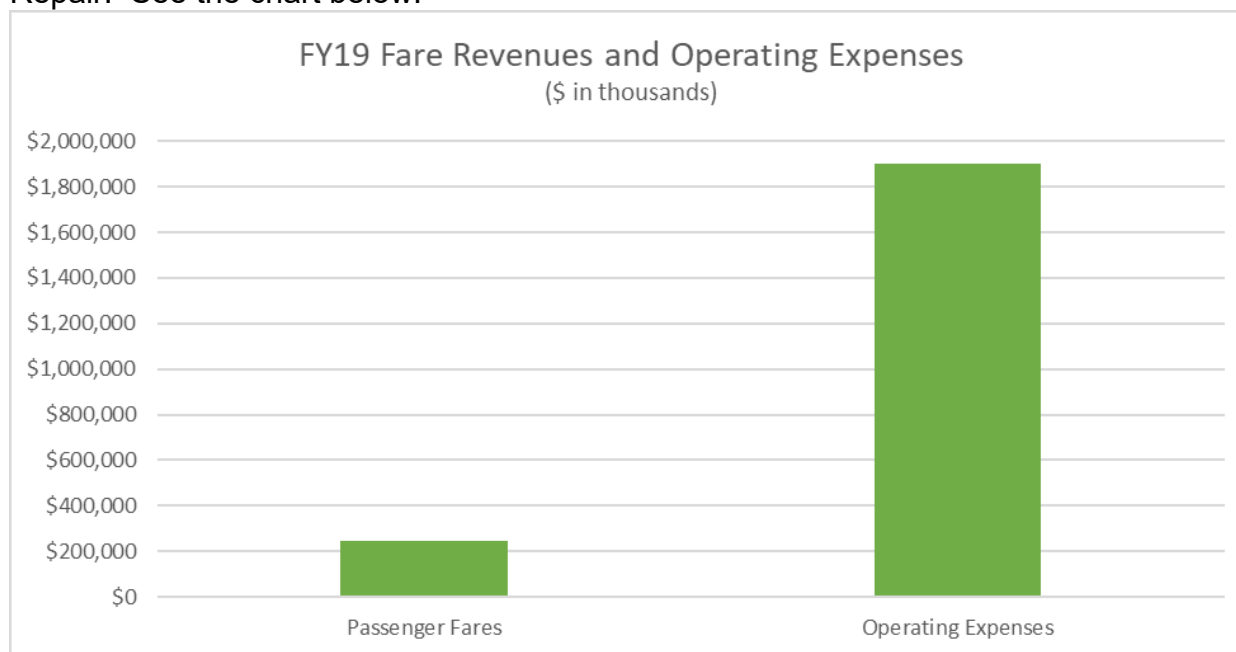
- Formation of FSI Implementation Team
- Preparation of Implementation Plan

- Online registration practices and application development
- Development of robust Outreach and Communications plan to notify riders and stakeholders
- TAP card Acquisition and Distribution Plan
- Development of detailed pilot evaluation metrics

Long-term Fareless System Considerations

Funding

Perhaps the most important long-term consideration is sustainable source(s) of funding. To ensure the financial stability, prior to implementation of a fully fareless system, reliable Federal and/or State long-term funding source must be secured. Metro is funded through a variety of sources including local and state sales and fuel taxes, federal assistance, grants, bond proceeds from debt issuance, advertising income, ExpressLanes tolls, and passenger fare revenue. These fund sources support Metro's Capital and Operating costs year over year, as well as the Subsidy Funding Program, which distributes regional transportation funding to local jurisdictions and other transit operators throughout LA County. Passenger fares directly fund Metro's Transit Operations, paying for approximately thirteen percent (13%) of annual costs. Annually, Metro's fare revenue is approximately \$246 million; in contrast - fiscal year 2019 - Metro's Operating Budget was \$1.9 billion, not including State of Good Repair. See the chart below.



A long-term, fareless transit system would reduce Metro's fare revenues and directly impact Metro's Operating budget. A future transition to a fareless transit system would result in some cost savings (i.e., from not having to collect fares) but also increased costs. Staff anticipates that there would be an increase in transit services to meet increased demand. A substantial increase in ridership due to free fares, and a loss of the associated fare revenue, would result in larger long-term financial impacts to Metro's Operations budget. Without a sustainable source of additional funding to off-set the loss of fare revenues and potential increases in operational costs, a transition to a fareless system could compromise Metro's ability to sustain good levels of service. To ensure the financial

stability, prior to implementation of a fully fareless system, reliable Federal and/or State long-term funding source must be secured.

The FSI Task Force has identified several potential long-term funding sources. Among the more salient potential sources are fees that could be generated from a future traffic reduction program. Metro is currently conducting a Traffic Reduction Study (TRS) to determine if a traffic reduction program could be feasible and successful in LA County. TRS will identify a pilot concept during summer 2021. The completion of the study is anticipated in Spring 2022 and a pilot program concept and implementation plan will be brought to the Metro Board for consideration. Utilizing TRS generated revenue to offset the cost of fareless transit can be considered by the Board at that time.

Existing Fare Collection Contracts

As of September 2020, there were approximately 24 active contracts for system maintenance and equipment contracts relating to fare collection, with a total contract value of \$647 million. Of this, there is a remaining contract value \$295 million through and including Fiscal Year 2024 for the Cubic Transportation Systems vendor contract. There is a potential for cost savings if these contracts are eliminated. The decision to eliminate or maintain fare collection contracts is dependent on how a fareless system would be implemented and the associated impacts, including any reallocation of remaining contract value or cost savings.

There are also significant costs to maintaining a fare collection system - staff estimates approximately \$75 million in Fiscal Year 2019 and approximately the same amount annually. In a fully fareless system, some of these costs would translate to direct savings for the agency. If these costs were eliminated, some of these funds would be available for other purposes. Metro administers and funds the TAP fare collection system. However, the TAP system is used by 25 municipal and local transit operators in LA County and eliminating the contracts would require an alternative fare collection system for any operators that maintain fares.

Access Services

Most aspects of Americans with Disabilities Act (ADA) paratransit, including fares, are governed by the ADA, its regulations and guidance provided by the Department of Transportation (DOT) and the Federal Transit Administration (FTA). Section 37.131(c) of the Code of Federal Regulations addresses fares as follows:

The fare for a trip charged to an ADA paratransit eligible user of the complementary paratransit service shall not exceed twice the fare that would be charged to an individual paying full fare (i.e., without regard to discounts) for a trip of similar length, at a similar time of day, on the entity's fixed route system.

Based on existing federal regulations, Access Services cannot charge more than double of Metro's base fare. Therefore, if Metro implements a fully fareless system, Access Services is required to go fareless. Access Services projects ridership increases with a fully fareless system and an estimated annual cost ranging from \$180 million to \$301 million for a fully fareless system.

Formula Allocation Procedure (FAP)

Metro's Subsidy Funding Programs use established formulas to distribute regional transit operations funds to Metro and to Eligible and Included Operators in Los Angeles County. The FAP includes

distribution of funds from federal section 5307, STA, TDA, Prop A (40% discretionary), City of Commerce's Zero-fare compensation (funded by Prop A interest), and Prop C programs. The formula is fifty percent (50%) of the weight is based on in-service revenue vehicle mileage and fifty percent (50%) of the weight is based on fare units (defined as total fare box revenue divided by the base cash fare). Currently, Fare Units continue to be frozen at 2006 levels per Board motion.

Because fare revenues are a major part of existing allocation methods, these formulas must be reassessed by the region if Metro eliminates fares for any group. It is important to note that any changes to FAP or the Measure R Methodology would be a regional decision requiring consensus among all LA County transit operators who receive formula-based funding. Once regional consensus is achieved, amendments to the FAP would require three-fourths approval by the Metro Board of Directors. Although the FAP was decided upon locally, the formula is also codified in state law. Thus, any changes to the FAP would also need to be reflected in state law.

Title VI

Recipients of federal funds from the Federal Transit Administration (FTA) must follow requirements under Title VI of the Civil Rights Act of 1964. Any proposed changes to fare or fare media, must be analyzed for potential impacts to minority and low-income customers compared to overall customers. The Fare Equity Analysis must be conducted and approved by the Metro Board of Directors prior to formal adoption and implementation of a change lasting more than six months. If an agency seeks to extend a pilot for longer than six months, prior to the completion of a Title VI analysis, the agency will need to obtain FTA approval. Metro's request to extend a pilot more than six months was approved by the FTA in April 2021.

Access Services has distinct regulatory considerations. Based on existing federal regulations, Access Services cannot charge more than double of Metro's base fare for the proposed FSI Pilot, given that Metro will maintain a base fare of \$1.75 for non-low-income riders, a change in Access Services fare structure is not anticipated. If Metro implements a fully fareless system, Access Services is required to go fareless. It should also be noted that Access customers, as part of the Free Fare program, have long been able to ride for free on most Los Angeles County fixed-route systems. This program has been successful at offering mobility options to our customers while substantially reducing demand on the paratransit system. In FY 19, Access customers took 26.6 million free fare trips on the fixed-route system.

Environmental Considerations

Transportation is considered the leading cause of environmental pollutants. Direct local, state, and federal investment in fareless transit will likely incentivize transit use in LA County and while bringing environmental benefits to the region. LA County is home to the state's largest concentration of CalEnviro-Screen designated disadvantaged communities. These communities are impacted by poor air quality and historical socio-economic disenfranchisement.

Metro's transit system is one of the cleanest in the nation, with Clean Natural Gas buses - over 1,000 times cleaner than a diesel engine and electric-powered trains. Increased transit ridership contributes to reductions in vehicle miles traveled (VMT) and reductions in greenhouse gas emissions. Investments in transit infrastructure are important to continue these improvements. With funding to support a fareless pilot or fully fareless system - Metro would be able to leverage existing transit

infrastructure investments to meet the state's aggressive clean air goals. Generally, investments that improve transit service result in ridership increases, fewer vehicles on the road and a corresponding reduction in greenhouse gas emissions and smog. Implementing a fareless system policy and increasing transit ridership could help realize the environmental benefits of improved transit service.

Equity

Equity is both an outcome and a process to address racial, socioeconomic, and gender disparities to ensure fair and just access to jobs, housing, education, mobility options, and healthier communities. Equity means that Metro's service delivery, project delivery, policymaking, and distribution of resources account for the different histories, challenges, and needs of communities across Los Angeles County. The FSI Task Force conducted a Rapid Equity Assessment to evaluate the impacts of a fareless system on several groups. This assessment concluded that the cost barrier to transit disproportionately impacts low-income households, people of color, women, students, older adults, and people with disabilities. The cost of fares for many customers limits their mobility to access employment, education, medical care, and social services. These are basic needs and are considered essential to an individual's well-being and quality of life. Eliminating fares for low-income riders in the long-term would lead to equitable outcomes.

Thirty percent (30%) of Metro's bus customers still pay with cash, and an additional twenty-two percent (22%) of bus customers pay with stored value on Transit Access Pass (TAP) cards (Metro's fare collection system) - which is more expensive per ride than a pass. Customers paying cash do not benefit from free Metro transfers, which increases their overall trip cost - and about half of the trips made on Metro require a transfer. All this often adds up to the cost of riding Metro being higher for low-income riders. In the end, the cost burden is more significant for low-income customers compared to other income groups. A low-income fareless program would benefit our cash paying customers as they would save money and benefit from free transfers.

Metro's onboard Customer Survey in Fall 2019 showed that seventy-five percent (75%) of Metro customers were Latino or Black, with approximately seventy percent (70%) of customers having an annual household income less than \$35,000. Furthermore, fifty-one percent (51%) of Metro customers lived below the poverty level, with a median household income of \$19,325 systemwide and only \$17,975 for bus riders. Survey findings also indicated that seventy-nine percent (79%) of customers did not have access to a car when they took their trip and only thirty-seven 37 percent (37%) were utilizing a fare discount.

Ridership and Operational Constraints

Another critical long-term consideration to a fareless system is estimating ridership increase and operational readiness to meet increased ridership. Research of other transportation agencies that have adopted fareless policies (all prior to the pandemic) showed ridership increases ranging from 20 -60 percent. Given the unique historical moment and conditions under which this policy is being considered, the best way to approximate the potential increase in ridership for Metro and municipal operators in LA County because of the elimination of fares is to carefully monitor ridership during the pilot. This will allow Metro staff to better forecast ridership increases and to evaluate the need for additional operational resources. As indicated above, a limited fareless pilot would not trigger the need for additional service hours, new buses, or rail vehicles. In the long-term, if a fareless policy is adopted for all customers, ridership increases could eventually trigger the need for more operators,

new buses, and new rail vehicles.

Additional Considerations - Fare Capping

If fare capping was implemented on Metro, a TAP customer would not pay more than \$7 a day, \$25 a week, or \$100 in a month, and customers would still receive the same free transfers that they receive today. To make fare capping possible, TAP cards would require a fare capping configuration written onto them.

Fare capping provides an equitable fare payment option by ensuring customers do not overpay for the rides they are taking. This feature would allow everyone to benefit from traveling on Metro (and later other transit operators) with the knowledge that they are always paying the lowest price possible for travel.

Fare capping could be beneficial; however, it probably would not lower the cost of transit for as many low-income workers as simply going fareless. Fare-capping is moving forward as a stand-alone initiative separate from FSI that may be implemented for riders who do not qualify for the initial FSI pilot program.

DETERMINATION OF SAFETY IMPACT

Metro is committed to ensuring the safety and security of its employees and customers. Based on feedback from internal and external surveys, Metro understands that safety on the Metro system is a top priority. Through the implementation of a fareless system, Metro's System Security and Law Enforcement team will be tasked with evaluating the needs of riders and operators to adequately address all concerns. In the summer of 2020, staff initiated efforts to convene a Public Safety Advisory Committee (PSAC) to seek community feedback on how Metro can reimagine its approach to public safety on the bus and rail system. Most recently, the Metro Board of Directors issued a call for investing at least \$40 million on alternatives to policing, including establishing a transit ambassador program that provides staffed presence at Metro facilities and on Metro vehicles, and offers riders assistance and connections to resources.

FINANCIAL IMPACT

Financial impacts to budget stemming from the participation of local and municipal transit operators in the pilot are subject to ongoing participation and cost-sharing agreements. Staff will amend budget pending approval by the Metro Board of Directors.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

Recommendation supports the Vision 2028 Strategic Plan Goal #3 "Enhance communities and lives through mobility and access to opportunity."

ALTERNATIVES CONSIDERED

The Board may choose not to approve the recommended action. This alternative would preclude Metro and the region from developing a data-driven, qualitative, and quantitative empirical analysis and understanding of a fareless transit system in Los Angeles.

NEXT STEPS

With approval of this item, FSI leadership team will be housed in the Office of the CEO. Immediate work activities include finalizing the FSI implementation work plan; establishing an implementation team from throughout the agency; spelling out a timeline for startup in the coming months; coordinating with all relevant parties essential to pilot implementation; convening a Task Force of social service agencies for pilot outreach and registration; finalizing FSI pilot evaluation methodology and assembling inter-agency pilot evaluation team; revising the FY22 budget to reflect Board approval of the FSI pilot; pursuing cost-sharing agreements with educational institutions and interested transit agencies; aggressively pursuing funding for both the pilot and for a potential long-term fareless system; and completing and issuing the FSI final study report.

ATTACHMENTS

Attachment A - Operator Survey Results

Attachment B - FTA Fare Equity Analysis Waiver

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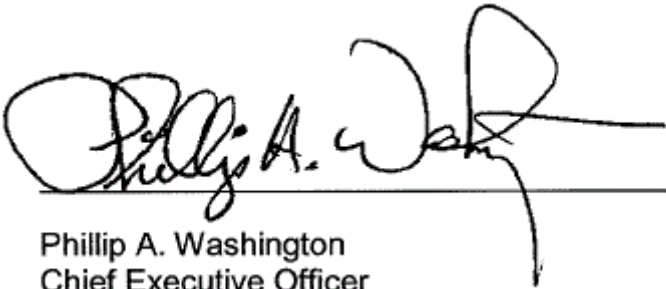
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Reviewed by: Phillip A. Washington, Chief Executive Officer (213) 922-7555



Phillip A. Washington
Chief Executive Officer

Los Angeles Transit Operator Survey Results

Participating Agencies:

1. Anonymous
2. AVTA
3. City of Commerce
4. City of Gardena's GTrans
5. City of Glendale
6. City of Norwalk - Norwalk Transit System
7. City of Redondo Beach- Beach Cities Transit
8. City of Santa Clarita - Transit
9. City of Santa Monica Dept. of Transportation
10. City of South Pasadena
11. Culver City Transportation Department
12. Foothill Transit
13. LADOT
14. Long Beach Transit
15. Montebello Bus Lines
16. Palos Verdes Peninsula Transit Authority
17. Pasadena Transit
18. Pomona Valley Transportation Authority
19. Torrance Transit System

Would your agency be interested in participating in a Fareless Pilot Program?

- *Depends on if the fare revenue loss could be recovered from new or different revenue sources. Need to be made whole.*
- *If funds are provided.*
- *If the Fareless Initiative is available and funded for the whole region with funding identified for post-pilot, we would be interested in participating. The fareless program should be a countywide regional program funded with county-wide funds. The ultimate decision regarding our participation will be a board action.*
- *LADOT is already demonstrating free fares on its DASH routes for students K-Community College with its DASH to Class program. Please note however, that loss in farebox revenues is made whole by our LCTOP grants.*
- *Maybe*
- *Support FSI being introduced in stages; 1st stage (i.e. K-12) and the 2nd stage (i.e. Community Colleges and Low Income) only being implemented when funds are identified to replenish loss in fare revenue.*
- *TBD*
- *The City of Pasadena and Pasadena Transit is supportive of the Fareless System Initiative (FSI) and interested in participating if funding is included in order to keep the agency financially whole and provide support to prevent deterioration of the system. Pasadena Transit is a "Local Transit" provider funded by Local Return funds. Despite using all the Local Return funds the City receives for public transit, the system operates*

at capacity, pre-COVID, during COVID, and anticipated to be post-COVID. In order to carry more passengers, additional capacity is required to avoid deteriorating the system. FSI and regional fare policies must be coordinated in order to avoid disrupting the mobility ecosystem in Pasadena that requires multiple transit agencies to fully serve the Pasadena community. Developing an FSI program that precludes or would make it unsustainable for Pasadena Transit to participate, would leave a service gap in the FSI program. It would also not be equitable to exclude Pasadena Transit for not experiencing significant ridership decline like so many other agencies. We are also concerned how this will impact our long-term contracts established with the colleges and Universities in Pasadena.

- *Undecided - requires City Council approval*
- *We cannot commit without Council Approval*
- *Would most likely be a lot of pushback from residents as we are para-transit and senior population.*
- *Yes to assist with bringing ridership back*
- *Yes, if long-term funding can be identified.*

Do you currently have a fare free or reduced fare service agreement or MOU with a community college or school district?

- No=10
- Yes= 9

What is the estimated annual revenue loss to your system if the agreement with this school, college or district is terminated as a result of FSI?

- N/A = 7
- unknown - we do not track separately
- \$15,242
- \$37,173
- \$70,000
- \$84,528
- \$109,742
- \$350,000
- \$370,000
- \$620,000
- \$653,688
- \$1,258,000
- **Annual Total = \$3,568,373**

Please indicate the % share of your transit system's ridership in FY19. If you are unsure, you may use the Metro's percentage included below.

Low-Income (70% Metro)	K-12 Students (7% Metro)	College Students (11% Metro)
70%	7%	11%
85%	5%	5%
66% (This is an estimate from a survey done in 2018)	10% (this is based off Hummingbird)	11% (We are using Metro's)
70%	20%	11%
74%	5%	4%
Unsure - 30%	50%	1%
50%	18%	2%
78%	8%	16%
0%	0%	0%
70%	7%	11%
70%	8%	11%
87%	20%	2%
70%	8%	11%
80%	5%	7%
15%	80%	0%
86%	17%	1%
75%	.5%	5%

What reduced fares and subsidies do you currently offer?

- Senior and disabled individuals ride our fixed route service for \$1 compared to the regular \$2.50 fare. We provide a 50% discount on passes for low-income households. We issue less than 10 of these passes annually. We do not have any student fares.
- low income, students, seniors, and disabled.
- Free fixed-route Fare collected for fixed peak-hour routes
- We operate a fareless system for all passengers.
- Fares are located here: <https://www.culvercitybus.com/Fares>. Culver City also participates in UPass, ITAP S, and BruinGo.
- We participate in the LIFE Program and UPass. We also offer half price (\$0.50) for Seniors and Disabled Customers.
- Discounted bus passes and senior/disabled half-fare as required by FTA.
- Military & Veterans, Senior Pass to cover the 50% fare, LIFE
- Reduced fare for Seniors/Disabled, Student passes, and free for blind/wheelchair;
- Student Free Fares on DASH; Cityride (paratransit services) clients free on DASH
- Student Fare (K-12) \$1; Two children under 5 ride free when accompanied by an adult paying one full fare; Senior (Age 62 & Older) / Disabled / Medicare Card Holder \$0.60

- Pasadena Dial-A-Ride (DAR) members may use Pasadena Transit at no cost. DAR members took 70,714 annual rides in 2019. We have pass agreements with ArtCenter and Caltech that provide subsidies because of their large passenger base.
- PVRTA has a (4) city demand response services that provide door to door transportation to people with disabilities and Elderly for \$1 each way within our service area.
- Provide BCT bus pass subsidies to Redondo Beach residents for student, and S/D bus monthly passes. We do not subsidize based on income.
- Seniors 60 and over or disabled with required identification ride FREE on our local transit service.
- Senior / Disabled / Youth / Medicare
- Senior Subsidy bus pass.
- Students - \$0.50; Seniors - \$0.25; Disabled - \$0.25; Medicare - \$0.25; Children under 4 – Free; Blind and Access Card Holder – Free
- Half fare for senior/disabled/Medicare cardholders and our participation in the LIFE program

What was your NTD reported 2019 Fare Revenue?	What was your NTD reported 2019 Operations cost?	FY19 Farebox Recovery
\$ 23,353	\$ 616,180	3.8%
\$ 192,298	\$ 1,310,612	14.7%
\$ 316,000	\$ 3,247,000	9.7%
\$ 687,525	\$ 5,678,993	12.1%
\$ 963,486	\$ 7,095,203	13.6%
\$ 1,246,966	\$ 14,706,784	8.5%
\$ 2,500,000	\$ 33,000,000	7.6%
\$ 3,285,644	\$ 26,339,176	12.5%
\$ 3,500,000	\$ 37,061,215	9.4%
\$ 4,213,812	\$ 23,879,063	17.6%
\$ 4,810,505	\$ 25,356,955	19.0%
\$ 10,861,961	\$ 98,801,789	11.0%
\$ 11,413,768	\$ 81,169,730	14.1%
\$ 13,790,289	\$ 92,540,008	14.9%
\$ 16,079,586	\$ 95,928,313	16.8%
\$ -	\$ 4,524	-
Total: \$73,885,193	Total: \$ 546,735,545	Average: 12.3%

What is the FY22 estimated additional costs your agency would incur if the FSI pilot was implemented countywide? K-12 + Community College students (August 1, 2021 to June 30, 2022) + Low-income riders (January 1, 2022 to June 30, 2022)	What is the FY23 estimated additional costs your agency would incur as a result of implementation of the FSI pilot? K-12 + Community College students + Low-income riders (July 1, 2022 to June 30, 2023)
unknown - we do not track separately	unknown - we do not track separately
\$140,712	\$250,000
\$533,180	\$1,414,087
\$250,000	\$250,000
\$150,000	\$159,000
\$0	\$30,000
\$160,000	\$163,200
\$1.9m RSH + \$4m security costs systemwide	\$13,000,000
\$522,476	\$1,385,698
\$1,822,600 to \$2,206,400	\$4,604,600 to \$5,851,600
\$1,185,621	\$1,185,621
\$4,370,000	\$4,370,000
\$330,000	\$770,000
\$126,000	\$126,000
\$1,070,000 in additional RSH + \$5,240,000 for 8 additional vehicles to meet the anticipated ridership demand in FY23	\$3,060,000
\$140,000	\$260,000
\$852,408	\$2,260,734
\$24,090,689.00	\$34,535,940.00



U.S. Department
of Transportation
**Federal Transit
Administration**

Headquarters

East Building, 5th Floor – TCR
1200 New Jersey Avenue, SE
Washington, DC 20590

May 11, 2021

Mr. Philip A. Washington
Chief Executive Officer
Los Angeles County Metropolitan Transportation Authority
One Gateway Plaza
Los Angeles, CA 90012-2952

Dear Mr. Washington,

This correspondence is to confirm receipt and approval of Los Angeles County Metropolitan Transportation Authority's (Metro) request for a waiver from the requirement to conduct a fare equity analysis after implementing a promotional fare for six months as outlined in Federal Transit Administration (FTA) Circular 4702.1B, Chapter 4, Section 7(b). This waiver grants Metro an additional 12 months (18 months total) after implementing its Fareless System Initiative (FSI) pilot program to gather data. This waiver is not date specific; however, it only applies to the pilot program and activities identified in the request.

As described to FTA, the FSI pilot program is a potential first step in determining the viability of a fareless system for all who ride Metro. This pilot program will eliminate fares for low-income individuals and K-12 students on Metro rail and bus services. The 12-month extension will provide Metro the necessary time to collect more accurate data from its large service area—more detailed data will help to more accurately identify challenges and concerns of the stakeholders in the region. If Metro decides to keep the pilot program permanently, the agency will conduct a fare equity analysis as required by FTA Circular 4702.1B and submit to FTA within three months of the end of the data-gathering period.

The FTA Office of Civil Rights is available to offer technical assistance throughout the data collection and equity analysis periods upon request. If you have any questions or concerns, please contact Nicholas Sun directly at (312) 705-1267 or via email at Nicholas.Sun@dot.gov.

Sincerely,

Selene Faer Dalton-Kumins
Associate Administrator
Office of Civil Rights

cc: Ray Tellis, Regional Administrator, FTA Region 9

Monica McCallum, Acting Deputy Associate Administrator, FTA Office of Civil Rights

Fareless System Initiative

Executive Management Committee
May 20, 2021



Recommendation

- Approve an 18-month Fareless System Initiative Pilot in accordance with FTA Waiver Approval (with future additional request to extend 5 more months) for a total of 23 months
- Authorize three Full Time Employee (FTE) positions
 - One Deputy Executive Officer, two support FTE
 - Staff will be housed in the Office of the CEO
 - Additional staffing needs to be assessed going forward

Pilot Recommendation

- Aug 2021: K-12 + Community Colleges, cost-sharing negotiations pending
- Jan 2022: Low Income, cost-sharing negotiations pending
- Munis included in all pilot phases, cost-sharing negotiations pending
- Pilot through June 30th, 2023
- Board has the discretion to terminate the program at the conclusion of the pilot if long-term Federal/State funding commitments are not secured.

Independent Pilot Evaluation Criteria (Eno)

- Eno Center for Transportation - finalizing participation in evaluating pilot
- Framework
 - Metrics relevant to riders
 - Metrics relevant to operators
 - Metrics relevant to the region
- Qualitative and quantitative metrics are being identified
 - Ridership
 - Reducing Carbon Footprint
 - Customer Experience
 - Equity
 - Operational Costs
 - Safety & Security Impacts
 - Efficiency
 - Regional Impacts

Municipal Operators & Local Transit System Subcommittee (LTSS) concerns

- Funding Concerns – short term benefits do not outweigh long term funding issues
 - Program has high likelihood of success in terms of rider approval, but uncertain permanent funding
 - Difficulty of reversing the program
 - Unwinding existing college funded fare programs is a major risk – many agencies have a large proportion of funding from agreements with institutions
- Goals of Program
 - Should clearly be reflected in evaluation metrics of success
 - Equity is a longer-term goal that requires long-term funding
- Scope of Pilot
 - Low-income ridership is too high of a ridership share for a pilot
 - Agencies were *most open* to a pilot for K-12 riders only, as it would not unravel existing funding agreements with colleges
 - Impacts of a K-12 pilot would be easier to track, i.e., school attendance records
- Inclusion of the Perspective from Other Operators
 - Ongoing
 - Will be addressed during the pilot evaluation process (includes unintended consequences)

Transit Operator Survey Results

- Open 10 days, sent to all operators via LACMOA, Bus Operations Subcommittee, LTSS, and FSI Ad Hoc Committee
- 19 of 46 (41%) fixed route operators responded
 - Anonymous, AVTA, City of Commerce, Gardena's GTrans, Glendale, Norwalk Transit System, City of Redondo Beach- Beach Cities Transit, City of Santa Clarita, Big Blue Bus, South Pasadena, Culver City Transportation Department, Foothill Transit, LADOT, Long Beach Transit, Montebello Bus Lines, Palos Verdes Peninsula Transit Authority, Pasadena Transit, Pomona Valley Transportation Authority, Torrance Transit System

Transit Operator Survey Results (cont.)

- Three (3) agencies "yes" to participate (Culver City, Torrance, Commerce)
- Two (2) agencies "no" to participate (Palos Verdes, Montebello Bus Lines)
- Fourteen (14) agencies 'other'
 - Subject to the decision of their governing body
 - Concern for long-term funding
 - Nine (9) agencies, existing cost-sharing agreements w/educational institutions
 - Annual Community College agreements range from \$15,242 to \$1,258,000
 - Annual Community College agreements combined value \$3,568,373 for all nine agencies
- Farebox recovery average for 19 agencies response
 - 12.9%

Community College & K-12 Agreements

- Cost-sharing strategy and approach ongoing
 - Finalized prior to August 2021 start date
- Munis/LTSS concern regarding existing Community College agreements (ongoing discussions)

Proposed Cost-Sharing Discussion w/Transit Operators

- FSI Ad Hoc Committee Members (15+ meetings since October)
 - Access Services, LA County Public Works, City of Glendale, Long Beach Transit (LBT), City of Glendora, Norwalk Transit (LACMOA Chair), Commerce Bus Lines, Pomona Valley Transit Authority, Culver CityBus, Santa Monica Big Blue Bus (BBB), Foothill Transit, Torrance Transit, Gardena Transit (GTrans)
- Metro proposing that participating Transit Operators use Metro's pilot cost assumptions
- Cost-sharing negotiations continue
- Discussion with CEO and Ad Hoc Committee 5-11-21
 - Ad Hoc Committee will caucus and return to discussion

Low Income Enrollment, Early Steps

- Convened multi-agency discussion, 5/7/21
 - Eighty-one (81) attendees; 30+ Social Service Agencies & Community Based Organizations
 - FSI will be great incentive to participation, 80K currently enrolled in LIFE program
 - Literacy/language challenges
 - Enrollment Work Group to be formed; Provide enrollment training to agencies & CBOs
- Explore Low-income eligibility Self-Attestation (self-certification)
 - Policy Decision
 - Precedence already established during COVID-19
- Takeaway: many agencies & CBOs are willing to assist with pilot enrollment

FTA approval

- The FSI pilot extension has been approved by the FTA
- Fare changes (increases or decreases) longer than 6 months are considered permanent
 - Fare equity analysis required for disparate impact on Title VI-protected populations
 - Metro's request to extend pilot beyond six months - approved by FTA for 18 months, with additional request for (5 more months) for a total of 23 months.

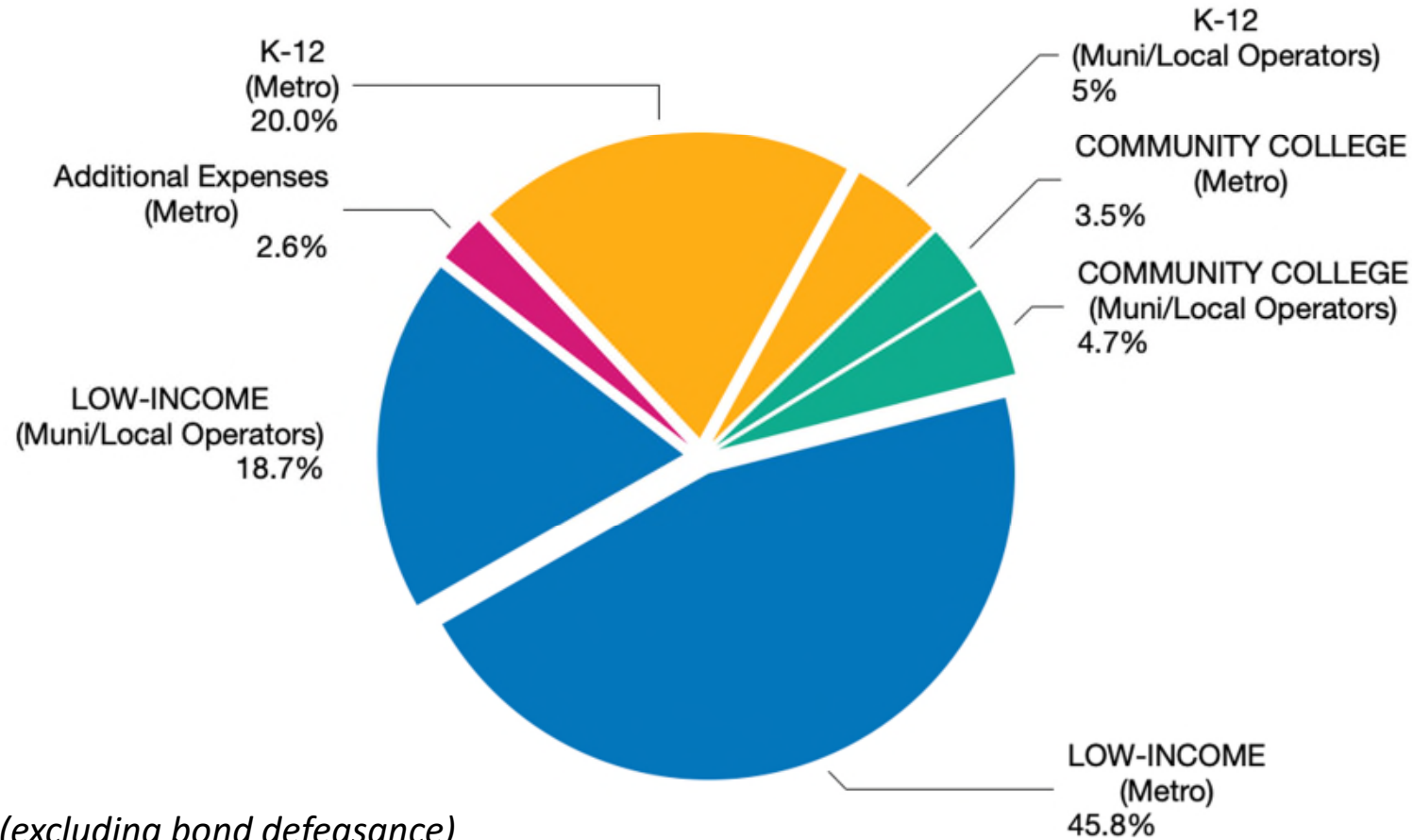
Budget Update (In Progress)

Estimated Funding Gap (\$ in millions)	Proposed Pilot Program		
	FY22	FY23	Total
Metro			
Metro - K-12 Students (August 2021 - June 2023)	26.5	26.5	\$ 53.0
Metro - Community College Students (August 2021 - June 2023)	4.7	4.7	\$ 9.4
Metro Passenger Fares - Low Income (January 2022 - June 2023)	\$ 14.3	\$ 107.1	\$ 121.4
<u>Additional Expenses</u>			
Transit Service Increase	-	-	-
Administrative Costs for New Low-Income Program	2.4	1.0	3.4
New Data Infrastructure / Operating Costs	0.2	-	0.2
Public Outreach Costs for Pilot Period	1.0	2.0	3.0
<i>Metro Pilot Subtotal</i>	\$ 49.1	\$ 141.3	\$ 190.4
Defeasance for General Revenue Bonds Secured by Fares (one-time payoff of outstanding Bond balance. Metro would have paid this amount regardless of the pilot, but the pilot would require paying earlier.)	80.0	-	80.0
Bond Savings from Defeasance	(12.0)	(12.0)	(24.0)
<i>Metro Total Including Bond Defeasement</i>	\$ 117.1	\$ 129.3	\$ 246.4
LA County Operators			
Regional - K-12 Students (August 2021 - June 2023) <i>*assumes 8% K-12 ridership</i>	6.3	6.3	\$ 12.6
Regional- Community College Students (August 2021 - June 2023) <i>*assumes 8% Community College ridership</i>	6.3	6.3	12.6
Regional Passenger Fares - Low Income (January 2022 - June 2023)	\$ 8.3	\$ 41.2	\$ 49.5
<i>LA County Operators Total</i>	\$ 20.9	\$ 53.8	\$ 74.7
Grand Total Estimated Funding Gap	\$ 138.0	\$ 183.1	\$ 321.1

Budget Update (alternate view-by phase)

Estimated Funding Gap (\$ in millions)	Proposed Pilot Program		
	FY22	FY23	Total
Pilot			
Metro - K-12 Students (August 2021 - June 2023)	26.5	26.5	\$ 53.0
Regional - K-12 Students (August 2021 - June 2023) <i>*assumes 8% K-12 ridership</i>	6.3	6.3	\$ 12.6
<i>K-12 Pilot</i>	\$ 32.8	\$ 32.8	\$ 65.6
Metro- Community College Students (August 2021 - June 2023)	4.7	4.7	\$ 9.4
Regional- Community College Students (August 2021 - June 2023) <i>*assumes 8% Community College ridership</i>	6.3	6.3	12.6
<i>Community College Pilot</i>	\$ 11.0	\$ 11.0	\$ 22.0
Metro Passenger Fares - Low Income (January 2022 - June 2023)	\$ 14.3	\$ 107.1	\$ 121.4
Regional Passenger Fares - Low Income (January 2022 - June 2023)	\$ 8.3	\$ 41.2	\$ 49.5
<i>Low-income Pilot</i>	\$ 22.6	\$ 148.3	\$ 170.9
<u>Additional Expenses (Metro only)</u>			
Transit Service Increase	-	-	-
Administrative Costs for New Low-Income Program <i>(Metro only)</i>	2.4	1.0	3.4
New Data Infrastructure / Operating Costs <i>(Metro only)</i>	0.2	-	0.2
Public Outreach Costs for Pilot Period	1.0	2.0	3.0
Defeasance for General Revenue Bonds Secured by Fares (one-time payoff of outstanding Bond balance; Metro would have paid this amount regardless of the pilot, but the pilot would require paying earlier.)	80.0	-	80.0
Bond Savings from Defeasance	(12.0)	(12.0)	(24.0)
<i>Metro Expenses, including Bond Defeasement</i>	\$ 71.6	\$ (9.0)	\$ 62.6
Grand Total Estimated Funding Gap	\$ 138.0	\$ 183.1	\$ 321.1

Budget Update (alternate view-by phase)



Direct pilot costs (excluding bond defeasance)

Budget Update (cont.)

(B) Budget Prioritization Opportunities	Preliminary Budget	
	FY22	FY23
Efficiency Savings on Bus and Rail Operating and Maintenance (O&M)	\$ 2,038.9	\$ 2,230.8
MicroTransit Pilot Evaluation	39.6	40.7
Assessment of SGR Program Modernization Need beyond Asset Condition Replacement	452.3	462.7
**5% Agency Overhead, Adm and Support Department Cost Reduction	131.9	134.9
Reallocate LIFE to Metro Pilot Pass	13.0	13.3
***Potential Savings		

Potential Savings		Notes
FY22	FY23	
\$ (40.8)	\$ (44.6)	Recommend start with 2% reduction per year through internal efficiencies; will not impact capital projects and will not degrade the quality of service, nor State of Good Repair*
(7.3)	(7.4)	Evaluate more thoroughly Micro-Transit Pilot zone by zone prior to full implementation
(37.6)	(37.0)	Align cashflow requirement based on actual expenditure rate of SGR after removing one time purchase in the past such as bus buy, New Blue and etc.
(6.6)	(6.7)	
(8.4)	(8.4)	Metro portion only
\$ (101)	\$ (104)	

Notes:
**Will not impact capital projects and will not degrade the quality of service, nor State of Good Repair*

***Ongoing discussions between Operations, FSI Task Force, OMB, and OCEO*

****Ongoing pursuit of cost-sharing with Transit Operators, Community Colleges, K-12 partners, and State and Federal funding assistance*

****Other funding possibilities for Board Consideration: Electrification program, advertisement revenue*

**** Reconsider allowing Metro to conform to California Air Resources Board (CARB) timeline for electrification of Metro buses*

****Budget to be amended upon Board approval and will reflect cost-sharing agreements*

Sample Internal Cost Efficiencies

Options for Budget Reductions	Examples for Departments' consideration
Efficiency Savings on Bus and Rail Operating and Maintenance (O&M)	<ol style="list-style-type: none">1. Condition of buses (acquisition of new buses, reduced mileage during the pandemic) should generate less maintenance costs2. With aggressive Operator hiring, potential savings in less Operator call-backs3. PPE costs should be less than prior year (due to completion of one-time installation of PPE equipment, plastic shields/barriers, social distancing signage)
5% Agency Overhead, Admin, and Support Department Cost Reduction	<p>Support departments: CEO Office (Customer Experience, Equity), Chief Policy Office, OEI, General Services, HC&D, Finance & Budget, VCM, IT, Risk Management, MASD, Office of Civil Rights, Communications, System Security</p> <ul style="list-style-type: none">• Professional Services charges to General Overhead should reduce• Miscellaneous Accounts (Travel/Training/Professional Associations) <p>Total reductions to equate to 5% of General OH</p>

Process for budget adjustments to take place after Board adoption of FSI and to be implemented by August 2021.

Work Plan Development (post Board action)

- Stand up office of FSI
- Communications Plan;
- Outreach Plan
- Cost-sharing & Enrollment Coordination
 - K-12; Community Colleges; Low-Income
- Evaluation Methodology
- TAP media – distribution items
- Amending the Budget
- Pursue pilot, and potential, long-term funding
- Back-end tech development in conjunction with school/low-income partners

Next Steps

- Stand up the FSI office within the Office of the CEO
- Continue collaboration with Munis/Local Transit Operators
- Negotiations with schools/community colleges
- Ease of enrollment/registration
- Secure FTA approval for an additional five (5) months

Q&A



Board Report

File #: 2021-0230, **File Type:** Informational Report

Agenda Number: 40.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: 2021 PROGRESS REPORT ON THE METRO VISION 2028 STRATEGIC PLAN

ACTION: RECEIVE AND FILE

RECOMMENDATION

RECEIVE AND FILE the 2021 Progress Report on the Metro Vision 2028 Strategic Plan.

ISSUE

In 2018, Metro adopted a 10-year strategic plan - Metro Vision 2028 - to transform mobility in Los Angeles County. This Progress Report (Attachment A) takes stock of the progress to date in advancing the commitments of Vision 2028 and reaching the outcomes it was intended to achieve: a world class transportation system that enhances quality of life for all who live, work, and play within Los Angeles County. The report shares status updates on the actions called for in the strategic plan. The report is also a critical look into implementation challenges where renewed effort is needed, and opportunities that can help inform a future strategic plan update.

BACKGROUND

The structure of Vision 2028 provides a guide for assessing progress on a more granular level. Vision 2028 includes 5 major goals. Goals 1 and 2 cover the core of Metro's services. To transform how people travel in the county, Metro needs to improve and expand mobility options (Goal 1). Prioritizing the customer experience (Goal 2) is the best way to ensure that residents and workers understand how to use Metro's services as part of their journeys and have positive experiences. Goal 3 acknowledges that transportation is interwoven with many aspects of peoples' lives, and that Metro can and should improve social and economic opportunity. Goals 4 sets out commitments to lead and collaborate regionally and nationally. Finally, Goal 5 is about improving internal governance for maximum effectiveness.

DISCUSSION

Vision 2028 is serving as an effective guide to agency strategies and priorities. Metro has launched the majority of the actions contained in the strategic plan, which is a testament to all of the departments and business units involved in these steps, and the efforts of community-based organizations, advocates, and partners. Because many of these actions were initiated recently and

will take time to complete or operationalize, the full benefits have yet to be realized countywide. Three years is not enough time to stop and reverse one hundred years of policy, planning, and investment that have elevated and reinforced single-occupancy driving above all other forms of mobility. As the actions in the strategic plan advance and as synergies emerge between multiple initiatives, the needle will move incrementally towards a multi-modal Los Angeles County, a place where more people live close to high quality mobility options and where buses have priority and travel faster than today. Vision 2028 will continue to map Metro towards world class transportation, while providing the flexibility for the agency to adjust tactics as needed.

Vision 2028 includes 75 actions that flesh out these five overarching goals. The majority of the 75 actions are underway. Metro has also launched a number of new efforts since adopting Vision 2028 that are supportive of the overall mission and responsive to the evolving context in the County. These include pathbreaking efforts like the Fareless System Initiative, COVID-19 Recovery Task Force, and the transit Public Safety Advisory Committee.

The multitude of initiatives that Metro has launched or completed are merely milestones along the way to achieving the Vision 2028 outcomes - the ultimate measures of success. Success is about doubling the share of non-solo driving trips, increasing bus speeds by 30%, ensuring everyone is within a 10-minute walk or roll to mobility services and need not have to wait more than 15 minutes any time of the day, and having ways to bypass congestion. These are ambitious targets.

Three years in, Metro has yet to adequately bend the curve on these outcomes. This is to be expected in the context of a 10-year strategy. Shifting longstanding countywide transportation patterns will take time. For context, between 2010 and 2019, the share of single-occupant vehicle commute trips increased by 2 percentage points to 74 percent, while transit trips declined from 7 percent to 6 percent. The magnitude of the challenge has only increased with the effects of the covid-19 pandemic, which has altered near-term travel behavior and demand for the different modes. The aggressive schedule makes it even more crucial for Metro to maintain its focus on advancing the strategic plan's commitments. Metro also needs to gather and acquire better data to develop a comprehensive baseline and track movement of the visionary outcomes. The status of each goal is summarized as follows:

Goal 1: Provide high quality mobility options that enable people to spend less time traveling

To improve mobility for all, Metro has increasingly centered equity by creating an Office of Equity and Race and developing equity tools to help guide budgeting and decision-making. Metro has elevated bus service via the NextGen Bus Plan and Better Bus Program. Metro launched the Traffic Reduction Study to explore the feasibility of a pilot program that would use congestion pricing to manage traffic in combination with additional high-quality mobility options. Metro piloted on-demand transit and incorporated lessons in a new Metro Micro on-demand service. These steps are in addition to the ongoing planning and construction of multiple rail, bus rapid transit (BRT), active transportation, and highway projects.

Vision 2028 acknowledged that completing more capital projects is necessary but not sufficient to achieve better mobility. Mobility needs to be planned and delivered as a system of interlocking parts, mutually supportive of one another. The Long Range Transportation Plan provides a balanced and

comprehensive approach to addressing the county's mobility needs with expected resources. The agency's NextGen Bus Plan has demonstrated the benefits of a holistic network-based approach. A similar mindset should be considered for planning the rail network, accommodating bicycles, walking, and other personal mobility devices on the transportation network, the arterial and highway network, and regional land use patterns - these efforts should be layered into a mobility system of interlocking parts.

Goal 2: Deliver outstanding trip experience for all users of the transportation system

A world class transportation system must meet the needs of each customer who travels to work, home, school, and other destinations. Metro is putting the customer first by placing a high priority on making its mobility services attractive, affordable, efficient, safe, convenient, comfortable, and easy to use. Metro established the Customer Experience team in the Office of the CEO and adopted the agency's first Customer Experience Plan. The purpose of the Customer Experience Plan is to take an honest look at pain points that customers tell us about, and to make improvements that are responsive to their concerns. Metro will update the Customer Experience Plan annually to track progress and drive investment in improvements for customers.

Safety and security of the transit experience is of paramount concern for Metro and the broader community. Metro convened the Public Safety Advisory Committee (PSAC) to help re-imagine Metro's approach to public safety on the transit system. PSAC will help guide new initiatives, including the deployment of unarmed transit ambassadors and flexible dispatch of social workers instead of relying solely on law enforcement.

The Integrated Station Design Standards Working Group has undertaken highly coordinated, cross-departmental, and comprehensive efforts to update station design standards and test new customer amenities for station public areas. The goal of these efforts are to create state-of-art customer environments that are safe, accessible, well-maintained and sustainable, and that reflect global transit station design best practices.

The care and commitment to the diverse needs of customers and their experiences form the new baseline standard at Metro. Fully implementing the Customer Experience Plan, enhancing bus frequencies, making transit fareless, implementing the future recommendations of the PSAC, and narrowing the state of good repair backlog will require Metro to make difficult choices to identify new sources of sustainable funding for operations and potentially reallocating existing fund sources towards these priority needs.

Goal 3: Enhance communities and lives through mobility and access to opportunity

Transportation is much more than buses, trains, and roads; it is a means to strengthening communities and connecting them to each other. Physical mobility unlocks social mobility and economic opportunities. From developing pathways for local careers in transportation to fostering equitable development on transit corridors, Metro can help uplift communities and confront the crises of housing affordability and regional homelessness. Pathbreaking initiatives like WIN-LA, SEED School, Transit-Oriented Communities Implementation Plan, Joint Development policy, and homelessness outreach teams are making a difference at the community level.

Zooming out to look at the region as a whole, greater attention must be paid to where people and jobs are strategically located in relation to the region's transportation system. Aligning regional land use patterns and transportation planning sets the foundation for robust transit ridership growth and decreased dependence on solo driving. World class transportation requires well-planned land use, with a focus on the transportation demands it generates, and Metro should play a role in both.

Goal 4: Transform LA County through regional collaboration and national leadership

Leadership is in large part about bringing diverse interests to the table, creating the conditions for consensus and for leaders to step forward, and holding each other to account. The NextGen Bus Speed Engineering Working Group is an example of Metro working in partnership with the Los Angeles Department of Transportation to accelerate the implementation of bus lanes and realize the full benefits of the bus network restructuring under the NextGen Bus Plan. The Freight Working Group is another leading example of Metro convening diverse public, private, and community-based interests to shape a vision for regional goods movement that will take into greater account environmental and equity objectives.

Another component of leadership is to inspire and push for change to policy agendas at the agency, state, regional, and national levels. Metro has taken a first step towards modernizing its highway funding programs to support complete streets. Metro has supported state policy change to allow more flexible planning of many transit and active transportation projects. When called upon, Metro has stepped up to serve in national efforts to respond to the COVID-19 pandemic and the federal administration.

Regional leadership is even more important as the County emerges from the COVID-19 pandemic and economic downturn, and turns its attention to other crises, including climate change. Ambitious action is required at all levels of government, of the private sector, and by individuals. Metro can play a leading role by prioritizing investments and policies based on reducing county-wide vehicle miles travelled. As for other challenges-from managing traffic congestion to integrating regional land use and transportation - a medium-term legislative strategy can help improve the policy environment to make it easier for Metro to reach its goals.

Goal 5: Provide responsive, accountable, and trustworthy governance within the Metro organization

Metro embraces its responsibilities as transit operator relied upon by many essential workers, and as a steward of funding generated by local taxpayers and from grants awarded by the state and federal governments. This is why Metro is constantly looking at ways to deliver better value for the travelling public. Metro's Office of Extraordinary Innovation has provided an open door to harness the knowhow and expertise of the private and non-profit sectors for the public good.

The visionary outcomes in Vision 2028 will, however, be harder to achieve until there is closer internal alignment of the agency with the strategic plan. This can include a centralized hub to coordinate basic data collection and planning analytics so that decision-makers have ready access to crucial information to aid deliberations. It also includes ways to accelerate the retention of institutional knowledge and creating leadership pathways to counteract a rapidly aging workforce and shrinking labor pool.

On the fiscal front, a true alignment of the organization to Vision 2028 means delivering to the Board a unified medium-term financial strategy in a Short Range Transportation Plan that shows the match between funding levels and investment needs. It will aid Metro in managing and prioritizing the resources that Metro is charged with stewarding. Attention must be paid to exploring best practices to assess the full life-cycle costs of major capital projects and to maximize their benefits from planning to construction to operations, and to address the increasing backlog of state of good repair needs.

FINANCIAL IMPACT

Receiving and filing the 2021 Progress Report on the Metro Vision 2028 Strategic Plan has no financial impact.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

Receiving and filing the 2021 Progress Report on Metro Vision 2028 Strategic Plan supports all five goals of Vision 2028.

NEXT STEPS

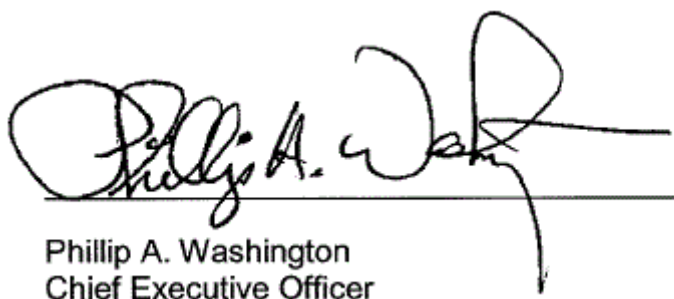
A final copy of the 2021 Progress Report will be published and distributed across Metro's various communication channels in Summer 2021.

ATTACHMENTS

Attachment A - 2021 Progress Report on the Metro Vision 2028 Strategic Plan

Prepared by: Emma Huang, Principal Transportation Planner, (213) 922-5445
Ray Kan, Senior Manager, (213)364-3048

Reviewed by: Tham Nguyen, Senior Director, (213) 926-2724
Joshua Schank, Chief Innovation Officer (213) 418-3345



Phillip A. Washington
Chief Executive Officer

2021 PROGRESS REPORT on the METRO VISION 2028 STRATEGIC PLAN

CEO Letter

Dear LA County Communities,

Three years ago, the Los Angeles County Metropolitan Transportation Authority (Metro), its stakeholders, and Los Angeles County residents came together and crafted Vision 2028, Metro's ambitious 10-year strategic plan that set us on a path to achieve world class transportation and advance opportunity for everyone in LA County. Vision 2028 recognizes that mobility is a cornerstone to success and quality of life. Transportation connects people to education, housing, jobs, healthcare, community and commerce. It is through this lens that Metro has continued to enhance our services and launch new and innovative initiatives.

As my six-year term serving as Metro's CEO draws to a close, I invite you to examine the strides that we have made together. This report assesses the progress we have made toward Vision 2028 goals and is honest about opportunities for improvement. We have accomplished a lot; and none of it could have been achieved without our communities and partners, our talented Metro staff and our Board of Directors.

I am proud of all that we have done in the first three years of implementing Vision 2028. We are taking concrete steps to center equity in everything we do. We have deepened our commitment to the bus as the workhorse of our transit system. We have continued to build for the future by expanding the rapid transit network. We have put the customer at the heart of all our work for improving access, safety, and reliability. We have begun exploring bold approaches to address gridlock, such as congestion pricing to manage traffic, so that streets can function more effectively for people, whether they choose to take transit, walk, bicycle, drive, or use other ways to get around.

We have piloted innovative on-demand mobility services to complement our extensive bus and rail network. We have created opportunities for underserved communities, small businesses, and partner jurisdictions to work together with us. We have joined forces with Los Angeles County to help the unsheltered and with local jurisdictions to shape transit-oriented communities. We have prioritized workforce development and diversity, and the creation of career pathways to train current and future generations for high-demand transportation jobs.

We have opened the door for the private and non-profit sectors to suggest innovative ideas through unsolicited proposals. We have secured federal and state funding to amplify our local revenues, and helped pass legislation that gives us more flexibility in planning and delivering transit and active transportation projects. I am especially proud of the progress we have made to position fareless transit as a means to lift the transportation cost burden off so many of our transit customers.

I think it's important to celebrate our accomplishments, but it's equally important to recognize where Metro and our partners have more work to do. In introducing Vision 2028, I wrote that, "The transportation challenges in the Southern California region require bold action." It will take more than three years to shift away from a century of car-oriented policies and to eliminate deep-rooted disparities in access to opportunity. By recognizing these remaining barriers – some of which have lived in our blind spots for decades – and realizing the opportunities, this report will keep all of us forthright and focused on our mission. There are no shortcuts on the path to world class transportation.

Metro's mission to support the transportation needs and regional growth of LA County continues. I know this agency, 11,000 strong, will succeed in its mission. The solid progress to date is made possible by our united

effort and shared focus on achieving the goals laid out in Vision 2028. Dedication to our daily work, from the frontline operators and mechanics to the office staff in One Gateway, along with engagement in public processes, productive partnerships and continuous innovation have produced the achievements described in this report.

I am honored to have had the privilege to be your leader these past six years, you will always have me as your advocate.

Sincerely,

Phillip A. Washington
Chief Executive Officer

DRAFT

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Staff Acknowledgements

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Executive Summary

In 2018, Metro adopted a 10-year strategic plan – Metro Vision 2028 – to transform mobility in Los Angeles County. This report takes stock of the progress to date in advancing the commitments of Vision 2028 and reaching the outcomes it was intended to achieve: a world class transportation system that enhances quality of life for all who live, work, and play within Los Angeles County. The premise of Vision 2028 is that Metro will need to pursue multiple tactics to advance this mission. The report shares status updates on the actions called for in the strategic plan. The report is also a critical look into implementation challenges where renewed effort is needed, and opportunities that can help inform a future strategic plan update. Three years into Vision 2028, what has Metro accomplished, and what remains to be done?

Vision 2028 is serving as an effective guide to agency strategies and priorities. Metro has launched the majority of the actions contained in the strategic plan, which is a testament to all of the departments and business units involved in these steps, and the efforts of community-based organizations, advocates, and partners. Because many of these actions were initiated recently and will take time to complete or operationalize, the full benefits have yet to be realized countywide. Three years is not enough time to stop and reverse one hundred years of past policy, planning, and investment that have elevated and reinforced solo driving above all other forms of mobility. As the actions in the strategic plan advance and as synergies emerge between multiple initiatives, the needle will move incrementally towards a multi-modal Los Angeles County, a place where more people live close to high quality mobility options and where public transit vehicles have priority on roadways and travel faster than today. Vision 2028 also provides flexibility for the agency to adjust tactics as needed.

The structure of Vision 2028 provides a guide for assessing progress on a more granular level. Vision 2028 includes 5 major goals. Goals 1 and 2 cover the core of Metro's services. To transform how people travel in the county, Metro needs to improve and expand mobility options (Goal 1). Prioritizing the customer experience (Goal 2) is the best way to give residents an experience that is worthy of not driving. Goal 3 acknowledges that transportation is interwoven with many aspects of peoples' lives, and that Metro can and should improve social and economic opportunities. Goal 4 sets out commitments to lead and collaborate regionally and nationally. Finally, Goal 5 is about improving internal governance for maximum effectiveness.

Vision 2028 includes 75 actions, the majority of which are underway. Metro has also launched a number of new efforts since adopting Vision 2028 that are supportive of the overall mission and responsive to the evolving context in the County. These include pathbreaking efforts like the Fareless System Initiative, COVID-19 Recovery Task Force, and the transit Public Safety Advisory Committee.

The multitude of initiatives that Metro has launched or completed are merely milestones along the way to achieving the Vision 2028 outcomes – the ultimate measures of success. Success is about doubling the share of non-solo driving trips, increasing bus speeds by 30%, ensuring everyone is within a 10-minute walk or roll to mobility services and need not have to wait more than 15 minutes any time of the day, and having ways to bypass congestion. These are ambitious targets.

Three years in, Metro has **yet** to adequately bend the curve on these outcomes. This is to be expected in the context of a 10-year strategy. Shifting longstanding countywide transportation patterns will take time. For context, between 2010 and 2019, the share of single-occupant vehicle commute trips increased by 2 percentage points to 74 percent, while transit trips declined from 7 percent to 6 percent. The magnitude of the challenge has only increased with the effects of the covid-19 pandemic, which has altered near-term travel behavior and

demand for the different modes. The aggressive schedule of Vision 2028 makes it even more crucial for Metro to maintain its focus on advancing the strategic plan's commitments. Metro also needs to gather and acquire better data to develop a comprehensive baseline and track movement of the visionary outcomes. The status of each goal is summarized as follows:

Goal 1: Provide high quality mobility options that enable people to spend less time traveling

To improve mobility for all, Metro has increasingly centered equity by creating an Office of Equity and Race and developing equity tools to help guide budgeting and decision-making. Metro has elevated bus service via the NextGen Bus Plan and Better Bus Program. Metro launched the Traffic Reduction Study to explore the feasibility of a pilot program that would use congestion pricing to manage traffic in combination with additional high-quality mobility options. Metro piloted on-demand transit and incorporated lessons in a new Metro Micro on-demand service. These steps are in addition to the ongoing planning and construction of multiple rail, bus rapid transit (BRT), active transportation, and highway projects.

Vision 2028 acknowledged that completing more capital projects is necessary but not sufficient to achieve better mobility. Mobility needs to be planned and delivered as a system of interlocking parts, mutually supportive of one another. The Long Range Transportation Plan provides a balanced and comprehensive approach to addressing the county's mobility needs with expected resources. The agency's NextGen Bus Plan has demonstrated the benefits of a holistic network-based approach. A similar mindset should be considered for planning the rail network, accommodating bicycles, walking, and other personal mobility devices on the transportation network, the arterial and highway network, and regional land use patterns – these efforts should be layered into a mobility system of interlocking parts.

Goal 2: Deliver outstanding trip experience for all users of the transportation system

A world class transportation system must meet the needs of each customer who travels to work, home, school, and other destinations. Metro is putting the customer first by placing a high priority on making its mobility services attractive, affordable, efficient, safe, convenient, comfortable, and easy to use. Metro established the Customer Experience team in the Office of the CEO and adopted the agency's first Customer Experience Plan. The purpose of the Customer Experience Plan is to take an honest look at pain points that customers tell us about, and to make improvements that are responsive to their concerns. Metro will update the Customer Experience Plan annually to track progress and drive investment in improvements for customers.

Safety and security of the transit experience is of paramount concern for Metro and the broader community. Metro convened the Public Safety Advisory Committee (PSAC) to help re-imagine Metro's approach to public safety on the transit system. PSAC will help guide new initiatives, including the deployment of unarmed transit ambassadors and flexible dispatch of social workers instead of relying solely on law enforcement.

The Integrated Station Design Standards Working Group has undertaken highly coordinated, cross-departmental, and comprehensive efforts to update station design standards and test new customer amenities for station public areas. The goal of these efforts is to create state-of-art customer environments that are safe, accessible, well-maintained and sustainable, and that reflect global transit station design best practices.

The care and commitment to the diverse needs of customers and their experiences form the new baseline standard at Metro. Fully implementing the Customer Experience Plan, enhancing bus frequencies, making transit fareless, implementing the future recommendations of the PSAC, and narrowing the state of good repair backlog will require Metro to make difficult choices to identify new sources of sustainable funding for operations and potentially reallocating existing fund sources towards these priority needs.

Goal 3: Enhance communities and lives through mobility and access to opportunity

Transportation is much more than buses, trains, and roads; it is a means to strengthening communities and connecting them to each other. Physical mobility unlocks social mobility and economic opportunities. From developing pathways for local careers in transportation to fostering equitable development on transit corridors, Metro can help uplift communities and confront the crises of housing affordability and regional homelessness. Pathbreaking initiatives like WIN-LA, SEED School, Transit-Oriented Communities Implementation Plan, Joint Development policy, and homelessness outreach teams are making a difference at the community level.

Zooming out to look at the region as a whole, greater attention must be paid to where people and jobs are strategically located in relation to the region's transportation system. Aligning regional land use patterns and transportation planning sets the foundation for robust transit ridership growth and decreased dependence on solo driving. World class transportation requires well-planned land use, with a focus on the transportation demands it generates, and Metro should play a role in both.

Goal 4: Transform LA County through regional collaboration and national leadership

Leadership is in large part about bringing diverse interests to the table, creating the conditions for consensus and for leaders to step forward, and holding each other to account. The NextGen Bus Speed Engineering Working Group is an example of Metro working in partnership with the Los Angeles Department of Transportation to accelerate the implementation of bus lanes and realize the full benefits of the bus network restructuring under the NextGen Bus Plan. The Freight Working Group is another leading example of Metro convening diverse public, private, and community-based interests to shape a vision for regional goods movement that will take into greater account environmental and equity objectives.

Another component of leadership is to inspire and push for change to policy agendas at the agency, state, regional, and national levels. Metro has taken a first step towards modernizing its highway funding programs to support complete streets. Metro has supported state policy change to allow more flexible planning of many transit and active transportation projects. When called upon, Metro has stepped up to serve in national efforts to respond to the COVID-19 pandemic and the federal administration.

Regional leadership is even more important as the County emerges from the COVID-19 pandemic and economic downturn, and turns its attention to other crises, including climate change. Ambitious action is required at all levels of government, of the private sector, and by individuals. Metro can play a leading role by prioritizing investments and policies based on reducing county-wide vehicle miles travelled. As for other challenges—from managing traffic congestion to integrating regional land use and transportation – a medium-term legislative strategy can help improve the policy environment to make it easier for Metro to reach its goals.

Goal 5: Provide responsive, accountable, and trustworthy governance within the Metro organization

Metro embraces its responsibilities as transit operator relied upon by many essential workers, and as a steward of funding generated by local taxpayers and from grants awarded by the state and federal governments. This is why Metro is constantly looking at ways to deliver better value for the travelling public. Metro's Office of Extraordinary Innovation has provided an open door to harness the knowhow and expertise of the private and non-profit sectors for the public good.

The visionary outcomes in Vision 2028 will, however, be harder to achieve until there is closer internal alignment of the agency with the strategic plan. This can include a centralized hub to coordinate basic data collection and planning analytics so that decision-makers have ready access to crucial information to aid deliberations. It also includes ways to accelerate the retention of institutional knowledge and creating leadership pathways to counteract a rapidly aging workforce and shrinking labor pool.

On the fiscal front, a true alignment of the organization to Vision 2028 means delivering to the Board a unified medium-term financial strategy in a Short Range Transportation Plan that shows the match between funding levels and investment needs. It will aid Metro in managing and prioritizing the resources that Metro is charged with stewarding. Attention must be paid to exploring best practices to assess the full life-cycle costs of major capital projects and to maximize their benefits from planning to construction to operations, and to address the increasing backlog of state of good repair needs.

Background on Metro Vision 2028

Residents and workers in Los Angeles County have long contended with significant barriers to mobility and access, including traffic congestion, dispersed land uses, and sparse affordable housing. These daily struggles stand in contrast to the region's global image of dynamism, diversity, and vitality. Imagining that Los Angeles County could be as good as or better than any other place in the nation, or even the world, for transportation options and mobility outcomes, the Metro Board adopted Metro Vision 2028 – the 10-year strategic plan – in 2018. This report takes stock of the progress to date in advancing the commitments of Vision 2028. It identifies success stories and areas where renewed efforts or adjustments are necessary for shaping a better transportation system in Los Angeles County.

Vision 2028 is a performance-based plan. Measuring performance is the only way to know whether Metro and the County are moving in the right direction. Where data is available, they are used to measure performance. Where data is lacking, efforts will be redoubled to collect the right data in a timely manner.¹

The Progress Report should be reviewed in the context of the three-year period since the strategic plan was adopted. During this time, many of the strategic plan's actions have been initiated. The COVID-19 pandemic has dramatically altered travel demand and patterns at least in the short-term. Measurable changes in long-term travel behavior take time to monitor, given the scale of the largest county in the nation. Within this context, the Progress Report focuses on the status of the commitments set out in Vision 2028.

Vision 2028:

Metro's mission is to provide a world class transportation system that enhances quality of life for all who live, work, and play within LA County.

Metro's vision is composed of three elements that help define the benefits that world-class transportation will foster:

- *Increased prosperity for all by removing mobility barriers;*
- *Swift and easy mobility throughout LA County, anytime; and*
- *Accommodating more trips through a variety of high-quality mobility options.*

A world class transportation system means taking steps to achieve the following outcomes:

- *Doubling the percent usage of transportation modes other than solo driving, including taking transit, walking, cycling, sharing rides, and carpooling*
- *Ensuring that all County residents have access to high-quality mobility options within a 10-minute walk or roll from home*
- *Reducing maximum wait times for any trip to 15 minutes during any time of day*
- *Improving average travel speeds on the County's bus network by 30%*
- *Providing reliable and convenient options for users to bypass congestion*

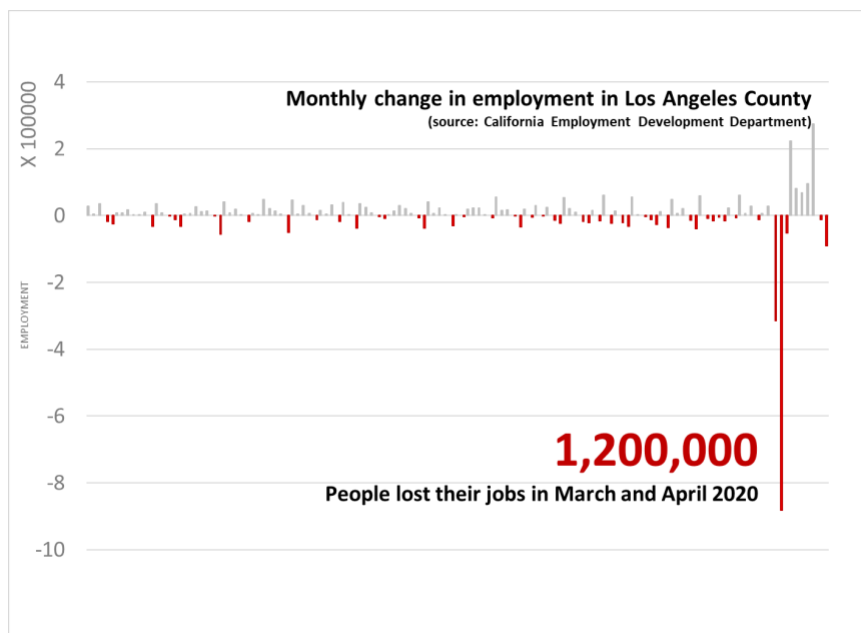
¹ Metro's policy documents contain a wide range of performance measures that will be monitored and reported out in future progress reports, such as the Customer Experience Plan, Long Range Transportation Plan, and Moving Beyond Sustainability Plan.

Los Angeles County, 2018 - 2021

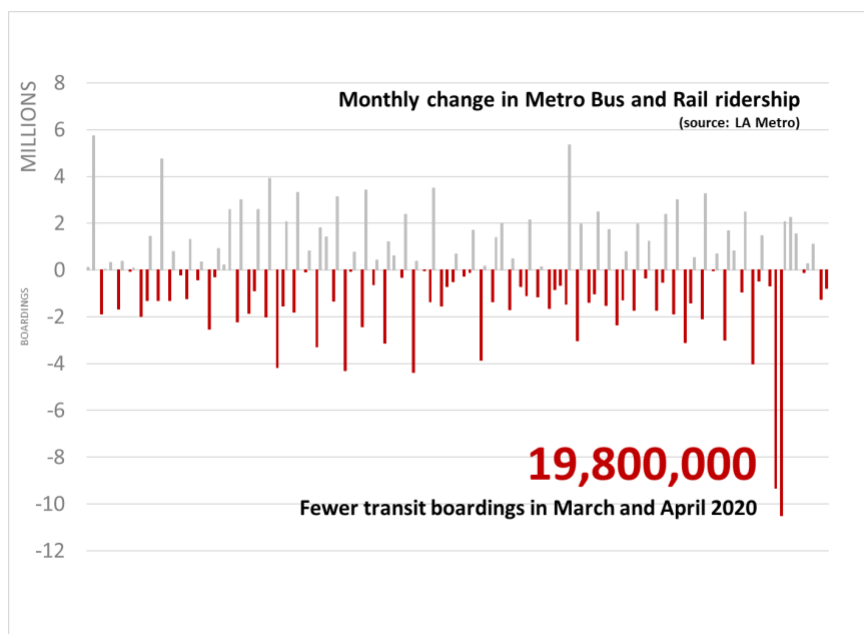
By any measure, providing mobility and access for all in the 4,100 square mile area of Los Angeles County is a tall order. The region's dependence on the car remains stubbornly high. The share of commute trips that is not solo driving remains below 30 percent. LA Metro's transit ridership reached a recent high of 478 million rides in 2013, then declined to 370 million by the end of 2019. Compounding these challenges are regional homelessness and the severe affordable housing crisis in the County. Setting a goal of delivering world class transportation options for all will mean bending and, ultimately, reversing the trajectories of these trends.

Few would have predicted at the time the strategic plan was adopted in 2018 that by the end of 2020, a microscopic virus with a global reach will have taken the lives of over 10,000 Los Angeles County residents, caused 600,000 residents to lose their jobs, and dragged transit ridership down to levels not seen since the 1970s.²

The first two months of the Safer at Home orders produced the biggest shocks to the economy and mobility in Los Angeles County: over a million residents lost their jobs, and Metro's transit ridership plunged by nearly 20,000,000 boardings.



² 23,479 Los Angeles County residents have succumbed to COVID-19 as of April 12, 2021:
<https://www.latimes.com/projects/california-coronavirus-cases-tracking-outbreak/los-angeles-county/>



Even in the darkest hours of the pandemic, Vision 2028 provided a reliable guidepost that Metro’s mission had not changed – to strive for a world class transportation system for the 10 million residents of Los Angeles County. The strategic plan’s flexible approach, with multiple tactics adding up to broad transportation improvements, enabled the agency to pivot to prioritizing safety and essential travel for Metro riders.

Metro was able to respond quickly and nimbly by

- maintaining a level of transit service to meet demand for essential trips,
- maintaining physical distance between bus operators and customers through the suspension of fare payment and introduction of rear door boarding,
- stepping up station and vehicle cleaning regimens,
- securing a robust supply of personal protection equipment to protect front line staff and distributing masks to customers,
- mobilizing a Recovery Task Force to identify actions that Metro could take in the near- and medium-term to recover from the pandemic with equity and congestion reduction objectives intact.

In the face of a rapidly changing financial reality in late Spring 2020, Metro embraced a ‘mission critical’ position, determining which services, projects, and initiatives to move forward and which to pause. Strategic initiatives essential to Vision 2028 persevered, including Measure R and M projects already in construction, the Long Range Transportation Plan update, the NextGen Bus Plan, implementation tools for the Equity Platform, the Customer Experience Plan, the Moving Beyond Sustainability Plan, and the ground-breaking for the SEED School.

2020 was also the year that Black Lives Matter turned into a global movement for change. Los Angeles County was one of the many epicenters of peaceful protests and civil unrest. These events have reinforced the unique role that Metro has embraced in bridging the geographic gaps to economic opportunity, uplifting communities, creating employment pathways for historically underrepresented groups, and evolving its practices in public safety and security.

At the time of preparing this Progress Report, the public health crisis is turning a corner as an increasing proportion of residents complete their vaccinations and businesses begin to reopen. Vision 2028 positions

Metro to bring back better mobility. The challenges documented in Vision 2028 still remain valid today but the types and levels of effort required to reverse the long-term trends in mobility and access deserve scrutiny. Adjustments to existing commitments, and the pursuit of new commitments, may be necessary to fit the post-pandemic context of economic recovery and resilience. A critical first step is to take stock of the progress to date in implementing Vision 2028, and to assess the challenges and possibilities ahead.

UNDERSTANDING THE PROGRESS REPORT

The Progress Report follows the structure of the strategic plan.

GOAL 1: Provide high-quality mobility options that enable people to spend less time traveling.
INITIATIVE 1.1: To expand the transportation network and increase mobility for all users, Metro will: <ul style="list-style-type: none"> Target infrastructure and service investments toward those with the greatest mobility needs. Expand the transportation system as responsibly and quickly as possible.
INITIATIVE 1.2: To improve LA County's overall transit network and assets, Metro will: <ul style="list-style-type: none"> Invest in a world-class bus system that is reliable, convenient, and attractive to more users for more trips. Partner with Metrolink to increase the capacity of the regional transportation system. Optimize the speed, reliability, and performance of the existing system by revitalizing and upgrading Metro's transit assets. Improve connectivity to provide seamless journeys. Improve safety on the transit system and reduce roadway collisions and injuries.
INITIATIVE 1.3: To manage transportation demand in a fair and equitable manner, Metro will: <ul style="list-style-type: none"> Develop simplified, sustainable, and comprehensive pricing policies to support the provision of equitable, affordable, and high-quality transportation services. Implement the ExpressLanes Tier 1 network within the next ten years. Test and implement pricing strategies to reduce traffic congestion. Manage congestion and reduce conflicts between the movement of goods and people on streets and highways. Explore opportunities for expanding access to shared, demand-responsive transportation options for everyone.
GOAL 2: Deliver outstanding trip experiences for all users of the transportation system.
INITIATIVE 2.1: Metro is committed to improving security.
INITIATIVE 2.2: Metro is committed to improving legibility, ease of use, and trip information on the transit system.
INITIATIVE 2.3: Metro will improve customer satisfaction at all customer touch points.
GOAL 3: Enhance communities and lives through mobility and access to opportunity.
INITIATIVE 3.1: To lift up local communities, Metro will create jobs and career pathways in transportation.
INITIATIVE 3.2: Metro will leverage its transit investments to catalyze transit-oriented communities and help stabilize neighborhoods where these investments are made.
INITIATIVE 3.3: Metro is committed to genuine public and community engagement to achieve better mobility outcomes for the people of LA County.
INITIATIVE 3.4: Metro will play a strong leadership role in efforts to address homelessness in LA County.
GOAL 4: Transform Los Angeles County through regional collaboration and national leadership.
INITIATIVE 4.1: Metro will work with partners to build trust and make decisions that support the goals of the Vision 2028 Plan.
INITIATIVE 4.2: Metro will help drive mobility agendas, discussions, and policies at the state, regional, and national levels.
GOAL 5: Provide responsive, accountable, and trustworthy governance within the Metro organization.
INITIATIVE 5.1: Metro will leverage funding and staff resources to accelerate the achievement of goals and initiatives prioritized in this Vision 2028 Plan.
INITIATIVE 5.2: Metro will exercise good public policy judgment and sound fiscal stewardship.
INITIATIVE 5.3: Metro will develop a transparent data management policy that addresses open data, data storage, and data protections.
INITIATIVE 5.4: Metro will apply prudent commercial business practices to create a more effective agency.
INITIATIVE 5.5: Metro will expand opportunities for businesses and external organizations to work with us.
INITIATIVE 5.6: Metro will foster and maintain a strong safety culture.
INITIATIVE 5.7: Metro will build and nurture a diverse, inspired, and high-performing workforce.

Each chapter begins with a description of the goal. The ‘Progress at a Glance’ provides a big picture view of overall progress. The series of questions that headline subsequent sections asks the agency how Metro is doing in meeting each of its Vision 2028 commitments. The challenges and opportunities section assesses the work within today’s conditions.

The *Summary of Strategic Opportunities* chapter:

This section summarizes the strategic opportunities identified within each goal chapter. Further dialogue will be required in most instances before action can be taken. The future update to Vision 2028 is an appropriate place to deliberate these possibilities.

The *Status of Actions* chapter:

This chapter summarizes the status of the 75 actions in Vision 2028’s action matrix and new actions that have been initiated or completed since 2018. While they are not the only actions that help advance the goals of the strategic plan, they are important commitments shared across the organization.

The *World Class Transportation* chapter:

This chapter shows examples of the possibilities should the vision and goals laid out in the strategic plan are realized. A number of performance achievements are shown from around the world in relation to Los Angeles County.

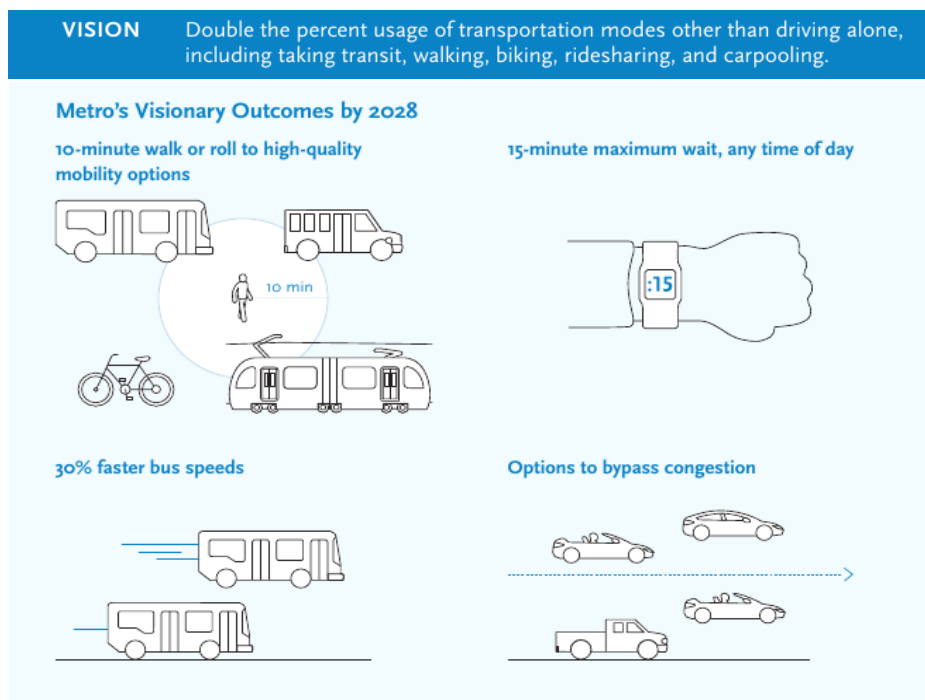
Given the breadth of Metro’s work, the Progress Report provides only a snapshot of the status of the commitments in Vision 2028. Metro documents listed in the Glossary provide a richer spectrum of Metro’s efforts toward delivering a world class transportation system.

Progress on the Visionary Outcomes

Achieving the Vision 2028 Visionary Outcomes will require a long-term commitment across the entire agency, and the support of Metro's partners and the travelling public.

- *Doubling the percent usage of transportation modes other than solo driving, including taking transit, walking, cycling, sharing rides, and carpooling*
- *Ensuring that all County residents have access to high-quality mobility options within a 10-minute walk or roll from home*
- *Reducing maximum wait times for any trip to 15 minutes during any time of day³*
- *Improving average travel speeds on the County's bus network by 30%*
- *Providing reliable and convenient options for users to bypass congestion*

The magnitude of the challenge is best exemplified by the trend prior to COVID-19: Between 2010 and 2019, the share of single-occupant vehicle commute trips increased by 2 percentage points, while transit trips declined from 7 percent to 6 percent.⁴ The pandemic has, at least in the near term, altered travel behavior and demand. Recovery may look very different depending on the mode. Continued monitoring is key to determining the lasting impacts of the pandemic on economic activity. Metro is preparing to create a baseline of how people travel throughout LA County and to track progress towards the mode shift target in Vision 2028. Additional data sources and analysis will help measure whether and how transportation service shifts and new mobility options achieve the other visionary outcomes on access, wait time, and travel speeds. As these data sources come on line and are tested, Metro will make them open and accessible to the public.



³ 15-minute wait time for all transportation options, including transit

⁴ American Community Survey

Progress on Goal 1

Provide high-quality mobility options that enable people to spend less time travelling

Provide high-quality mobility options that enable people to spend less time traveling.

To achieve this goal, Metro will expand transportation options, improve the quality of its transit network and assets, and take steps to manage demand on the entire network. This includes leveraging resources and influence and working with public and private sector partners to provide a transportation system that is easy, convenient, and reliable for all users. Increased use of high-capacity mass transit, walking, bicycling and ridesharing will allow the existing network to accommodate more trips while providing a higher level of mobility for residents and businesses.

Progress at a Glance:

Metro understands that delivering world class transportation in Los Angeles County will be a journey of many steps. Since 2018, these steps have included centering equity as a core decision-making lens, establishing the Equity and Race team in the Office of the CEO, elevating the role of the bus in the overall transit network, and adopting the Long Range Transportation Plan update. These steps are in addition to the ongoing planning and construction of Bus Rapid Transit, rail and highway projects funded in part by voter-approved sales tax measures.

With the multitude of projects and initiatives completed, underway, or in the planning stage, it is easy to be lulled into a false sense of progress. Progress, as embodied in Vision 2028, is about doubling the share of non-solo driving trips, increasing bus speeds by 30%, ensuring everyone is within a 10-minute walk or roll to mobility services and need not have to wait more than 15 minutes any time of the day, and having ways to bypass congestion. These are ambitious targets.

The COVID-19 pandemic and economic downturn further complicate travel patterns and behavior. In the short-term, transit ridership is suppressed and for many the work-from-home is the new commute. In the longer term, Los Angeles County's very high dependence on driving may worsen.

For all these reasons, an opportunity exists to envision a mobility system of interlocking parts that can fill unmet mobility needs, unify all the different modes of mobility, and create network operational synergies. Metro has already taken the first step with the NextGen Bus Plan, which has demonstrated the benefits of this holistic approach as applied to the bus network. A similar mindset should be considered for planning the rail network, accommodating bicycles, walking, and other personal mobility devices on the transportation network, the arterial and highway network, and convening and engaging partners on transit-supportive regional land use patterns – these efforts, when layered together, form a mobility system of interlocking parts.

Metro must partner with municipalities to shape and maximize the benefits of Metro's investments. Municipalities have the authority over the local public right-of-way, land use policies and zoning, parking supply requirements, and urban design standards. Delivering world class transportation will require strengthening and deepening partnerships with municipalities.

WHAT IS METRO DOING TO EXPAND THE TRANSPORTATION NETWORK AND INCREASE MOBILITY FOR ALL USERS? (Initiative 1.1)

We're targeting infrastructure and service investments towards those with the greatest mobility needs: High-quality transportation is essential for accessing opportunities. Vast disparities among neighborhoods and individuals in LA County reduce access to opportunity among disadvantaged communities, whether they be jobs, housing, education, health care, safe environments or other core tenets of thriving, vibrant communities. In addition, people with disabilities are disproportionately persons of color, older adults, low income, and persons with limited English proficiency. Transportation infrastructure, programs, and service investments must target those with the greatest mobility needs first, and thus improve access to opportunity for all. Equity means that Metro's service delivery, project delivery, policy decisions, and distribution of resources account for the different histories, obstacles, and needs of communities across the region. Metro is making progress with a variety of decision-making tools, including the Equity Platform, Equity Focus Communities definition, Metro Budget Equity Assessment Tool (MBEAT), Equity Tool, and Rapid Equity Assessment.

- Metro's Equity Platform Framework, adopted in 2018, lays the groundwork for how equity should be infused into the agency's business practices. Since then, Metro appointed the first Equity and Race Executive Officer, who is institutionalizing equity-supportive tools and resources. As one early deliverable, MBEAT guides Metro staff through a structured set of questions in considering racial and social equity explicitly in budgetary decisions. MBEAT has already been applied to the FY2021 mid-year budget and will be applied to the development of the FY2022 budget.
- We are also developing the Metro Equity Tool, which will assist staff in:
 - 1) identifying disparities that impact how Metro's services, programs, and projects are experienced,
 - 2) understanding the root causes of those disparities (in terms of past, present, and future effect) , and
 - 3) developing and implementing projects, programs, plans, policies, and initiatives in a manner that provides more equitable outcomes.

To identify communities where strategic transportation investments can significantly eliminate disparities and improve mobility, the Metro Board approved the classification of Equity Focus Communities (EFCs) in 2019 as part of the 2020 Long Range Transportation Plan. EFCs are places where strategic transportation investments can potentially reduce or eliminate disparities in mobility and other outcomes. EFCs are based on income, race, and car ownership. EFCs have been highlighted in other initiatives, such as the Transit-Oriented Communities Implementation Plan. By identifying communities with the greatest mobility needs, Metro can strategically plan for infrastructure and services to better address physical, social, and economic barriers to opportunity.

[Photo of Metro public meeting with audience members. The 2019 Public Participation Plan has selections. Or photo of a bus stop with riders waiting.]

Infographic: Equity Focus Communities (EFCs)

- EFCs comprise roughly 5% of the land area of LA County and contain roughly 30% of the population.
- Residents living in EFCs spend an estimated 55% of their income on housing and transportation compared to 33% countywide.
- 20% of households in EFCs are within a 10-minute walk of high-quality transit and 60% are within a 10-minute roll, compared to 8% and 38%, respectively, for LA County.
- Roughly 28% of all fatal and severe collisions and 40% of severe injury and fatal collisions involving pedestrians and bicycles in LA County occur in EFCs.
- In 2017 there were only 11 miles of protected bikeways in EFCs within ½ mile of fixed guideway transit.
- There are over 25,000 Federal, State, and County-Administered affordable housing units within 1/2 mile of high-quality transit in EFCs. This represents 23% of all the units in the county and 72% of the units within 1/2 mile of fixed guideway transit.
- Roughly one third of all air quality pollutants, countywide, are emitted in EFCs.
- Roughly one third of all identified activity centers are located in EFCs. Of these activity centers, 32% are with a 10-minute walk and 76% are within a 10-minute roll of fixed guideway transit stations.
- Of the principal arterials located in EFCs, 79% of the lane miles are in poor condition and only 2% are in good condition. This is in contrast to the county average for principal arterials, with 66% in poor condition and 6% in good condition.

Source: 2020 Long Range Transportation Plan Technical document, p. 114-p115

In addition to EFCs, Metro is gaining insights for decision-making on the mobility needs of women. The 2019 study, “Understanding How Women Travel” provides detailed analysis showing that women have different mobility needs, travel patterns, and commute demands, and perception and experiences of safety. The lessons from the study are informing the NextGen Bus Plan, Customer Experience Plan, and Better Bus initiative. In addition, Metro is developing a Gender Action Plan to ensure the agency’s activities include a gender perspective and to promote the consideration of gender issues at all levels. More details about these initiatives are highlighted in later sections of this report.

[Data visual: Suggesting an infographic: 60 percent of female riders reporting feeling safe riding Metro by day, a portion that falls sharply to 20 percent at night. Source: http://libraryarchives.metro.net/DB_Attachments/2019-0294/UnderstandingHowWomenTravel_FullReport_FINAL.pdf]

- **We're expanding the transportation system as responsibly and quickly as possible:** In 2020, the Metro Board adopted an update to the Long Range Transportation Plan, the agency's funding plan from 2017 to 2047. The plan provides a balanced and comprehensive approach to addressing the county's mobility needs with expected resources. Over the next few decades, Metro will invest more than \$80 billion to improve, expand and upgrade LA County's extensive public transit system, with over \$68 billion of it on major transit projects. This includes the construction and improvement of 22 transit corridors, and the addition of 106 miles of fixed guideway transit. In total, the Metro rail network will expand to over 200 stations covering nearly 240 miles.

While planning for the long-term expansion of the region's transit network, Metro is well on its way to delivering key projects that will add more rail, bus rapid transit, and walking and bicycling options by 2028, as summarized below.

[Photo: Metro capital construction]

[Data Visual indicating progress of:

- **New Blue (Line A):** 2018 - Planning Phase, 2 / 2021 – Completed in 2019
- **Purple Line Extension Section 1:** 2018 – Construction / 2021 – Construction, projected completion in 2023
- **Purple Line Extension Section 2:** 2018 – Final Design / 2021 - Construction, projected completion in 2026
- **Purple Line Extension Section 3:** 2018 – Bid / 2021 - Construction, projected completion in 2027
- **Regional Connector construction:** 2018 – Construction / 2021 - Construction, projected completion in 2022
- **Crenshaw/LAX:** 2018 - Construction / 2021 – Testing, projected completion in 2021
- **Gold Line Foothill Extension, Phase 2:** 2018 – Bid / 2021 - Construction, projected completion in 2027
- **Metro Rail to Rail / Rail to River:** 2018 Environmental / 2021 – Engineering, projected completion in 2024
- **Division 20 Portal:** 2018 – Final Design / 2021 – Construction, projected completion in 2024
- **Airport Connector:** 2018 – Final Design/ 2021 – Bid, projected completion in 2024
- **Orange Line Grade Separations:** 2018 – Environmental / 2021 – Design, projected completion in 2025
- **Link Union Station Project:** 2018 – Environmental / 2021 – Engineering, projected completion in 2027

Note:

*Metro also supports other capital projects through programming of sales tax measures and technical assistance.

** See the 2020 Long Range Transportation Plan Technical Document for more details.

The evolution of technology has had a profound impact on how mobility services are delivered. One of the most noteworthy 'disruptions' has been on-demand technology-enabled apps such as ridehailing and delivery services. Embracing on-demand service for the public good, Metro launched Metro Micro in December 2020, a three-year pilot program that provides on-demand ride-hailing service for short trips in areas of the County that are less suited for conventional fixed-route bus services. Metro Micro uses small vehicles, operated by Metro, in designated service zones in Los Angeles County. The service is designed to complement the existing transit system and was planned in conjunction with the NextGen Bus Plan, a redesign of the bus network. By introducing and testing a new service focused on short trips in smaller vehicles, Metro can better adapt operations to match the mode and vehicle to the diverse customer base. This new operation taps into the movement around new technology and transportation by providing ridesharing with Metro for short trips. Metro will continually refine this service based on demand and real-

time results from data collected during its operation. Six Metro Micro zones were deployed in 2020, and three more will be launched by September 2021.

[Photo: Metro Micro vehicle]

Caption: Designed the fleet styling standard to make an attractive and easily identifiable new Metro Service.]

HOW IS METRO IMPROVING LA COUNTY'S OVERALL TRANSIT NETWORK AND ASSETS? [Initiative 1.2]

- **We're investing in a world class bus system:** Metro's bus network is the backbone of the public transport system and carries nearly 75% of Metro riders. The half-a-million daily trips currently taken on the bus system are predominantly from Equity Focus Communities. This underscores the importance of improving bus service to provide social and racial equity for Metro riders. In October 2020, the Metro Board adopted the NextGen Bus Plan, which redesigned the bus network to deliver faster, more reliable, and convenient service to be more relevant to today's travel patterns. The NextGen Bus Plan, implementation which began in 2020, is offering more frequent service on key corridors, particularly during off-peak hours, and improving the speed of service via transit supportive infrastructure, such as the 5th Street and 6th Street bus-only lanes in downtown LA. The network restructuring will be complete by the end of 2021.

Complementing the network redesign of the NextGen Bus Plan is the Better Bus Program, which elevates attention to other aspects of the bus experience, including bus speeds, on-time performance, bus stop facilities, better security, improved cleanliness and better real-time information. Metro bus riders are at the center of the Better Bus effort, and customer feedback is being used to drive improvements.

[Map of high frequency NextGen bus service overlaid with Metro Micro zones.]

[Data Visual: By the end of 2021,

- The number of frequent bus lines will increase from 16 to 29 on weekdays
- 83% of Metro's current riders will have buses running every 5-10 minutes, compared to 48% in 2019
- 2.2 million residents will be within ¼ mile of a frequent bus stop, compared to 900,000 in 2019
- 18.6% more Equity Focus Communities will be newly served with 10-minute all day service
- Mid-day, evening and weekend service will improve and expand, creating an all-day, 7-day-a-week service

Congestion on local streets significantly slows buses and the journey times of customers, and increases Metro's costs to maintain the same levels of service. Improving the flow of buses and general traffic is a win-win scenario for all users of the roadways.

- Metro is finding creative ways to work with city partners to speed up bus trips and move more people through congested corridors. Examples include rapid roll out of bus-only lanes in downtown Los Angeles.
- Metro will begin implementing all-door boarding, transit signal priority, and bus priority lanes in select corridors through a new \$25 million SB-1 grant.
- Metro has programmed \$500 million from 2018 - 2020 on municipal projects to deliver traffic signal upgrades, transit preferential treatment and priority systems, computerized traffic control and monitoring systems, and intelligent transportation systems.
- Metro developed a five-year, \$2.1 billion program to support the Better Bus program.

[Photo: Bus in a bus-only lane zipping by SOVs]

[Data Visual: Suggesting a bar graph: As of Dec 2020: the 13,802 bus stops served by Metro, only 24% have a transit shelter, 46% have seating and less than 1% have dedicated lighting. Just 2% have real-time information displays. And more than half of bus stop areas lack curb ramps or other important provisions for people with disabilities. Source: Metro Customer Experience Plan 2020]

Enforcement in bus-only lanes is critical for keeping buses running on time. In February 2021, California Assemblymember Richard Bloom introduced Bill AB 917 that would authorize any public transit operator to enforce parking violations in specified transit-only traffic lanes through the use of video imaging and to install automated forward facing parking control devices on public transit vehicles. Metro advocated for state-wide enabling legislation. Metro's case for automated bus lane enforcement originated from an Unsolicited Proposal to the agency in 2018 that ultimately showed the magnitude of bus lane infractions on Wilshire Boulevard and the need for regulatory intervention.

Side Bar: Unsolicited Proposals allow the private sector to present innovative ideas directly to Metro for evaluation, jump-starting the procurement process by bringing different approaches and solutions to the table, thus enabling Metro to more quickly realize the benefits of new opportunities to deliver service better, faster and more efficiently. See Goal 5, Initiative 5.4 of this report for more details.

[Photo: bus lane, bus, parked car, camera on bus taking photo of license plate]

[Side Bar: Bus speeds had decreased pre-COVID due to traffic congestion, but bus lanes can help improve speeds as traffic returns. Metro has helped to add 11 bus-only lane miles to the transportation network since 2018. For example, the Flower Street Bus Lane service greatly improved mobility, accounting for more than 80 percent of people moving in the corridor or around 10,000 bus riders a day during the peak-hour period. Person-throughput increased 37 percent compared to pre-traffic conditions with limited reduction of the capacity in general use lanes for private vehicles. Two-thirds of bus customers and two-thirds of operators reported time savings. This perceived time savings is consistent with observed travel times, which improved up to 30 percent throughout the corridor. Based on mid-pilot period person throughput data. <https://vimeo.com/377091366> (Photo also available in the CX Plan.)

- **We're partnering with Metrolink:** The Southern California Regional Rail Authority (Metrolink), partially funded by Metro, provides interregional rail services that complements the Metro bus and rail network. Its trains run on routes that parallel congested highway corridors and offer the traveling public an alternative solution to driving alone. As an increasing number of Los Angeles County residents move to adjoining counties and commute back into the county to work, the role of Metrolink to provide a safe, convenient, reliable, and environmentally-friendly alternative to driving will increase in importance. Metro is a partner in Metrolink's Southern California Optimized Rail Expansion (SCORE) program, which is a \$10 billion capital program to upgrade Metrolink's passenger rail service through 75 different projects across six counties. Improvements include grade crossing, station and signal improvements, and track additions to improve safety, provide more frequent rail services, and access to jobs and affordable housing. So far, the Southern California Regional Rail Authority has secured \$2 billion in funding to implement the program.

Southern California Optimized Rail Expansion (SCORE) Capital Plan Select Projects (Source for more information: <https://metrolinktrains.com/about/agency/score>. Accessed March 31, 2021)

- Simi Valley Double Track Project: Metrolink Ventura Line. Projected completion in 2025
- Burbank Junction Speed Improvements: Antelope Valley and Ventura County Lines. Projected completion in 2023.
- Chatsworth Station Improvements: Ventura County Line. Projected completion in 2024.
- Rancho Cucamonga Extension Project: San Bernardino Line. Project completion in 2026.

Data Visual indicating progress of the following SCORE Projects:

- Simi Valley Double Track
- Burbank Junction Speed Improvements
- Chatsworth Station Improvements
- Marengo Siding Extension Project
- El Monte Siding Extension Project
- Rancho Cucamonga Siding Extension Project
- Serra Siding Extension Project

Source: <https://metrolinktrains.com/score>

- **We're optimizing the speed, reliability, and performance of the existing system by revitalizing and upgrading Metro's transit assets:** To deliver world class transit service that is safe, reliable, and meets customers' expectations, Metro must maintain its physical assets – transit vehicles, facilities, infrastructure, and equipment – in a state of good repair. The passage of Measure M in 2016 will greatly expand Metro's capital program over the coming decades. The collection of assets to manage and maintain on top of existing stock will expand with new infrastructure. Hence, Metro has procured a new Enterprise Asset Management System software, which will be fully implemented by 2024. The new software will enable Metro to track its assets and conditions more efficiently. Metro has also fully complied with federal requirements to complete a Transit Asset Management Plan (2018) and to set and report on asset performance annually.

Improving the connectivity of transportation services and first last mile access to transit — particularly walking and bicycling— can enhance the customer's trip. The next chapter, Progress of Goal 2 focuses on improving the user experience and will delve deeper into factors increasing connectivity.

- **We're improving connectivity to provide seamless journeys:** Since 2018, the Metro Board has approved plans to improve first and last mile access to 52 transit stations. Funding commitments associated with those plans from various sources total \$33 million and cover 17 of those 52 transit stations. Additional funding through the Metro Active Transport funding program will provide \$31 million to improve access to 11 additional transit stations. Funding commitments are essential to ensure that safe and accessible routes to transit are implemented.

[Sidebar: Metro continues to encourage cycling as a first last mile access to transit and provides bike hubs for secure storage.

New Bike Hub at Culver City – March 2019

New Bike Hub at Willowbrook/Rosa Parks Station open – Summer 2021

Existing Bike Hubs:

El Monte Station

Hollywood/Vine Station

Union Station

Upcoming Bike Hub:

North Hollywood Station]

[Sidebar: As of March 2021, these First Last Mile Plans have been approved and await implementation (* secured funding):

- Metro Orange Line Improvements (Sepulveda Station) First/Last Mile Plan*
- East San Fernando Valley Transit Corridor
- Purple Line Extension First/Last Mile Plan — Sections 2 & 3
- Blue Line First/Last Mile Plan*
- Inglewood First/Last Mile Plan*
- Gold Line Foothill Extension 2B*
- Aviation / 96th St Station (Airport Metro Connector) First/Last Mile Plan

- **We're working to improve safety on the transit system and reduce roadway collisions and injuries:** As a transit operator and funding partner for streets and highways, Metro plays a significant role in transportation safety. Metro's Office of Civil Rights and Inclusion Accessibility/Title VI team have worked with municipalities to install audible pedestrian signals for projects encompassing pedestrian crossings at intersections adjacent to Metro transit hubs. Metro has developed and tested textured directional paths at Metro rail crossings, and is investing the feasibility of similar applications to angled, non-rectilinear intersections adjacent to transit facilities.

Even though municipalities and Caltrans own and maintain most roadways, Metro can advance safety as a convener, planner, funder and operator. The urgency for Metro to exercise this influence mounts as motor vehicle crashes have become, in recent years, among the leading causes of early death in Los Angeles County. In 2017 alone, vehicle crashes in the county injured more than 91,000 people and killed 860 people. In January 2021, the Metro Board approved a resolution directing staff to develop a Street Safety Policy, encompassing strategies to reduce injuries and deaths, the creation of a countywide data collection program to document and analyze transportation-related serious injuries and fatalities, and an assessment of internal risk and liability for the safety of all Metro mobility services.

To promote active transportation options for nearby trips, Metro assists municipal partners with technical grant writing for their pursuit of funding for projects and programs that promote biking and walking, improve safety, enhance public health, and benefit disadvantaged communities through the State's Active Transportation Program (ATP). Since the adoption of Vision 2028, this assistance has supported municipal partners through two cycles of the ATP and resulted in grant awards totalling \$145.5 million. In addition to grant writing assistance, Metro partners with Caltrans to provide other technical assistance to help municipal agencies deliver local projects funded by state and federal grants. Since April 2019, Metro and

Caltrans have hosted 22 trainings across the county and via webinar which have been attended by staff from 57 agencies.

[Infographic: Half of all trips in LA County are three miles or less, which is generally a distance that can be biked. Approximately one quarter of trips are under one mile, which is generally a distance that can be walked. Over a third of trips of one mile or less are currently driven. Source: 2016 Metro Active Transportation Strategic Plan.]

- The onset of the pandemic spurred Metro to employ the range of existing technology, equipment, and infrastructure to protect the health and safety of both frontline staff and customers. Rear door boarding was introduced to encourage physical distancing between bus operators and customers. By May 2020, wearing masks became mandatory for all on all transit vehicles. Where observed compliance was an issue, Metro deployed street teams to hand out masks on specific bus routes or at bus stops. To help riders plan their essential travel, Metro worked with *Transit App*, Metro's official app, to introduce a new crowding feature that predicts occupancy levels on buses.

[PDF image: Transit app car card ad promoting the crowding feature.]

[Photo: Rear door boarding of riders who are also wearing masks.]

WHAT IS METRO DOING TO MANAGE TRANSPORTATION DEMAND IN A FAIR AND EQUITABLE MANNER?

[Initiative 1.3]

- **We're implementing the ExpressLanes Tier 1 network:** The Metro ExpressLanes Program offers drivers the option to bypass heavy traffic by paying to access a toll lane. This program currently operates on the I-110 and I-10 freeways and with plans to expand the ExpressLanes network in the region. Metro is committed to delivering the following Tier 1 ExpressLanes network within the 2017-2027 timeframe by converting existing high-occupancy vehicle (HOV), or carpool, lanes into toll lanes:

ExpressLane Segment	Status
I-10 (between I-605 and the San Bernardino County line)	Environmental phase
I-105 (between I-405 and I-605)	Environmental phase completed; design phase beginning summer 2021, revised opening 2027
I-110 (from 182nd Street to I-405)	No current action; opening 2044 per Measure M
I-405 (between I-101 and I-10)	Environmental phase
I-405 (between US 101 and the Orange County line)	Budgeted start date to be determined
I-605 (between I-10 and the Orange County line)	I-10 to I-105: environmental phase I-105 to Orange County Line: budgeted start date to be determined

- **We're planning to test pricing strategies to reduce traffic congestion:** Congestion in LA County is prevalent throughout the day and occurs on arterial streets as well as on regional highways. While the COVID-19 pandemic has reduced traffic congestion in the interim, traffic is likely to return as economic activity rebounds. In fact, during the summer of 2020, the overall travel on the regional freeway system returned to 90% of what it was before the pandemic in January 2020. Metro will test more expansive congestion pricing models, beyond the ExpressLanes Program, for managing traffic in the most congested areas of the County. In 2019, Metro initiated the Traffic Reduction Study to examine the feasibility of a traffic reduction pilot

program. This study will explore how to reduce traffic through a two-pronged approach: 1) manage travel demand through congestion pricing, and 2) provide more high-quality transportation options. A pilot program concept and implementation plan will be brought to the Metro Board for consideration in Spring 2022. Should the Board approve the proposal, Metro will work with partners and the public to begin the multi-year pilot design for an anticipated launch in 2025.

- **We're addressing the movement and conflicts between goods and people on streets and highways:** LA County is home to the nation's largest port complex, the Ports of Los Angeles and Long Beach. Truck-based goods movement directly impacts the performance of the region's highways, and vice-versa, highway congestion delays the delivery of goods to destinations within the county and throughout the country. The I-710, SR-60, and I-10 are the most impacted highways. Metro is undertaking various projects, including spot congestion improvements, truck platooning trials, to improve conditions. The impacts associated with truck traffic are not limited to highways. The arterial road network is used by trucks, buses, trains, cars, pedestrians, cyclists, and so on. The mix of users and travel patterns creates conflicts.

In January 2021, the Metro Board adopted the 2021 Los Angeles County Goods Movement Strategic Plan – Metro's response to the many goods movement-related challenges affecting the environment and well-being of communities. Metro convened a network of community, private, and public sectors to collaborate on a plan that is centered on achieving inclusive growth that supports the county's economic competitiveness, environmental sustainability, and social equity goals.

[Photo: Big rig truck or delivery vehicle driving on the street among other vehicles, with pedestrians and cyclists traveling in the midst.

- **We're exploring opportunities for expanding access to shared, demand-responsive transportation options for everyone:** A precursor to Metro Micro, the Mobility on Demand (MOD) pilot program demonstrated how ride-hailing technology can effectively connect riders to public transit. MOD was launched with private ridesharing company Via in 2019 and funded in part by a Federal Transit Administration Mobility on Demand grant. It was designed to offer a flexible, new option for first- and last-mile trips to and from transit. Wheelchair accessible vehicles were available, and rides could be booked through a call center, in addition to a smart phone. In its two years of operation, this pilot project provided more than 270,000 rides and met or exceeded project goals, including average wait times, ridership and average ride ratings, at 4.9 stars out of 5. During the COVID-19 pandemic, Metro suspended shared rides, introduced point-to-point rides to any destination within the zones, including grocery stores and hospitals. In partnership with community organization First 5 LA, the program also delivered food and diapers to families in need, to support vulnerable communities during the pandemic.

WHAT CHALLENGES AND OPPORTUNITIES SHOULD METRO CONSIDER?

- A. **Plan and deliver mobility as a system of interlocking parts:** The Long Range Transportation Plan sets out a comprehensive and balanced approach for considering the mobility needs of everyone in Los Angeles County with expected resources. The plan expresses all the commitments made over the years through voter-approved sales tax measures and other Metro Board decisions. The plan also identifies the role of bold policies (e.g. road pricing) and close partnerships to incentivize more efficient use of the transportation system. Building on this baseline, an opportunity exists to envision a mobility system that can fill unmet mobility needs, unify all the different modes of mobility, and create network operational synergies. Metro has already taken the first step with the NextGen Bus Plan.

The NextGen Bus Plan has demonstrated the benefits of a network approach to transit planning using data on current travel patterns – resources can be more efficiently allocated for maximum effectiveness, and vastly improve the customer experience. A similar mindset could be considered for envisioning and planning the rail network, micromobility and shared mobility, the arterial and highway network, and regional land use patterns in an integrated manner – when layered together, they form a mobility system of interlocking parts.

- For rail transit, Metro has traditionally planned and delivered projects as discrete stand-alone segments. As such, the interoperability of the lines and integration of segments with the rest of the transit network – service levels, physical integration, and equipment – is sometimes overlooked. Even though numerous rail lines are in operation today and many more are under construction, there is still significant value, both in terms of financial impacts and customer experience, in taking a more holistic approach to rail network planning moving forward. What is the vision for Metro Rail and intercity regional rail? How should the rail network reinforce and support focused regional land use patterns? How will the bus network restructuring through the NextGen Bus Plan be integrated with existing and future rail lines?
- For micromobility and shared mobility, what is the vision for integrating on-demand shared services, such as e-scooters, bike share, and ridehail with the Metro Bus and Rail networks? Prior to COVID-19, Metro initiated the New Mobility Regional Roadmap – a countywide coalition of local governments to address this very topic. This coalition should be re-activated as soon as possible.
- For arterials and highways, what is the vision for prioritizing different users, the pricing signals that should be introduced to manage congestion, and how safety and equity can be embedded in design and operations? How can low cost and very cost-effective bus speed and reliability improvements, such as bus lanes, bus bulbs, and signal priority be accelerated? Similarly, on freeway corridors, how can Metro accelerate low-cost “hot spot” improvements that improve vehicle flow and safety, but do not physically expand roadways or take property? The challenge, of course, is that Metro does not own or operate the road network (see Goal 4 for current efforts to incrementally modernize Metro’s highway funding programs). Metro can provide a countywide complete streets vision and plan to help partners transform key arterials. In addition, the federal administration’s proposed American Jobs Plan provides indications that the traditional pursuit of highway capacity expansion will give some way to maintenance and rehabilitation, and even potentially re-imagining the role of highways to reconnect and repair communities. Metro, in collaboration with municipal partners, community-based organizations, and Caltrans, can seize this emergent and once-in-a-generation moment to re-imagine the purpose and future of the mobility system in Los Angeles County.

- B. Deepen Partnerships with Municipalities to Deliver World Class Transportation:** Maximizing the mobility benefits of Metro’s investments to as many people as possible, especially those with the greatest mobility needs, will require deeper partnerships with municipalities. Being responsive to the diverse needs in the county would not be possible without these essential partnerships. Metro will increase collaboration with local jurisdictions to support transit priority on local roadways, to improve first and last mile access to transit, to improve local mobility and to realize transit-oriented communities. Municipalities have direct control over supportive policies over land use and affordable housing, parking supply requirements, transit priority measures, and complete streets. In addition, municipalities have a lot of influence over the implementation of Metro’s bus and rail design guidelines and standards for a world class transit customer experience. Building on Metro’s Transit-Oriented Communities (see Goal 3) and first and last mile programs, Metro could explore supportive policies agreements, joint grant writing, and incentive structures as a way to

lock in mutually beneficial commitments by Metro and host jurisdictions when planning a transit corridor, bus stop improvements, or other type of facility.

C. Address the State of Good Repair Backlog: As noted earlier, Metro is tracking its assets and conditions on a regular basis. The state of good repair backlog is \$2.7 billion as of June 30, 2020, in the following distribution:

- Infrastructure (e.g. rail guideways): 40%
- Buses and trains: 38%
- Passenger facilities, parking facilities, administrative buildings: 20%
- Equipment: 2%

By 2030, the cumulative state of good repair needs will reach \$6.3 billion. In comparison, the cumulative funding for state of good repair identified in the Long Range Transportation Plan is \$3.2 billion. In recent years, the gap between the average annual state of good repair needs and funding in the annual budget has widened (e.g. the approved FY2021 budget identified \$414 million for state of good repair, leaving a shortfall of \$216 million)

Looking ahead, the state of good repair needs will continue to rise as assets age and new assets are added to Metro's inventory. The expected state of good repair needs is \$11.8 billion in 2040, \$20.4 billion in 2050, and \$26.7 billion in 2060. Narrowing the state of good repair gap will require making trade-offs with other investment demands.

D. Develop a Comprehensive Pricing Framework: In 2020, Metro initiated the Comprehensive Pricing Study with the intention of preparing an overall pricing framework to unify the pricing policies for Metro Bus and Rail, Metro Micro, Metro Bikeshare, Metro Vanpool, Metro parking facilities, micromobility parking at Metro Rail stations, and ExpressLanes. This work is on hold pending the initiation of the Fareless System Initiative pilot program (see Goal 2). The lessons and directions from implementing the Fareless System Initiative pilot will inform the appropriate next steps for the Comprehensive Pricing Study.

Progress on Goal 2

Deliver outstanding trip experiences for all users of the transportation system.

Metro will endeavor to improve trip experiences for all users of the transportation system, recognizing that a world-class system, serving a world-class metropolis, should be attractive, affordable, efficient, safe, convenient, and user-friendly. Specifically, Metro will take actions to improve security, ease of use, and access to accurate travel information on the region's transit systems, and will work to improve customer satisfaction at all customer touch points, as described in the following pages.

Progress at a Glance:

A world class transportation system begins and ends with each customer who travels to work, home, school, and other destinations. Metro's goal is to put the needs of the customer first by making its mobility services attractive, affordable, efficient, safe, convenient, and easy to use. Significant efforts include establishing the Customer Experience team in the Office of the CEO, adopting the agency's first Customer Experience Plan, increasing the frequency of bus routes, introducing flexible ways to access transit information and to pay fares, and bringing free Wi-Fi Internet to the bus fleet now, and to rail in the future.

Safety and security of the transit experience is of paramount concern for Metro and the broader community. Metro convened the Public Safety Advisory Committee (PSAC) to help re-imagine Metro's approach to public safety on the transit system. PSAC will help guide new initiatives, including the deployment of unarmed transit ambassadors and flexible dispatch of social workers instead of relying solely on law enforcement.

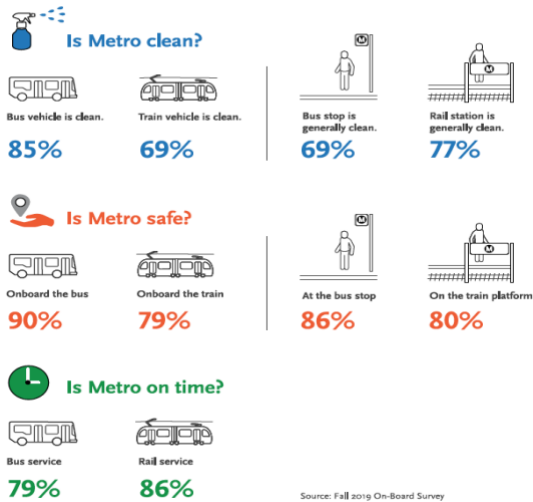
The Integrated Station Design Standards Working Group has undertaken highly coordinated, cross-departmental, and comprehensive efforts to update station design standards and test new customer amenities for station public areas. The goal of these efforts is to create state-of-the-art customer environments that are safe, accessible, well-maintained and sustainable, and that reflect global transit station design best practices.

The care and commitment to the diverse needs of customers and their experiences form the new baseline standard at Metro. Fully implementing the Customer Experience Plan, enhancing bus frequencies, making transit fareless, implementing the future recommendations of the Public Safety Advisory Committee, and narrowing the state of good repair backlog will require Metro to make difficult choices to identify new sources of sustainable funding for operations and potentially reallocating existing fund sources towards these priority needs.

Infographic: Metro Transit Customer Profile

	Bus Customer	Rail Customer
Gender, Race, Ethnicity	53% Women 66% Latinx 15% African-American	46% Women 44% Latinx 18% African-American
Resources	19% Have access to a car 55% Have smartphones 39% Have cellphones	34% Have access to a car 72% Have smartphones 25% Have cellphones
Financial Status	\$18,000 median annual income 41% Rely on discounted fares 30% Pay with cash	\$28,000 median annual income 27% Rely on discounted fares 0% Pay with cash

Source: Fall 2019 On-Board Survey

Metro Asked Riders

(Source: Metro Customer Experience Plan 2020, p. 6)

WHAT IS METRO DOING TO IMPROVE SECURITY? [Initiative 2.1]

- **We're modernizing our approach to public safety:** Providing a transit system that is safe for both customers and frontline staff is a continuous endeavor for Metro. Evolving the role of system security and law enforcement will require a commitment to building and strengthening relationships with customers, advocates, and all levels of government. Recent efforts include:
 - Metro is convening a Public Safety Advisory Committee to work with the agency's System Security and Law Enforcement, Office of Civil Rights, Office for Equity and Race, and the Executive Officer for Customer Experience to develop a community-based approach to public safety on the transit system.
 - In March 2021, the Board approved a motion directing at least \$40 million be included in the FY2022 budget to support public safety and homelessness initiatives (e.g. a transit ambassador program (\$20 million), elevator attendants at rail stations (\$1 million), flexible dispatch system enabling response by non-law enforcement personnel (\$1 million), pilot homelessness strategies to be recommended by the Public Safety Advisory Committee (\$3 million), etc.)
 - Metro is incorporating safety and security in developing and refining station public area design standards through the coordinated efforts of the Integrated Station Design Solutions Working Group. These efforts include design criteria refinements that help ensuring station public areas are free of clutter, provide clear sight lines, have updated customer communication interface, and safe paths-of-travel.
 - Metro is updating its camera intelligence system. In 2020, Metro received a \$5 million federal grant to procure a new video management system for its rail stations. Metro will continue to request grant funding to enhance closed circuit television technology systemwide to protect customers.
 - Metro championed the advancement of cybersecurity initiatives to protect the agency's digital infrastructure by obtaining a \$3 million grant in FY20.
 - Metro has updated its sexual harassment protocol: victims or witnesses can call 888-950-7233, text 213-788-2777, or report incidents through the Transit Watch app. Security dispatch will notify law enforcement, who will respond to sexual harassment incidents as a high priority. Victims will receive a referral to Metro's "It's Off Limits" sexual harassment support hotline to receive counseling, 24 hours a day, seven days per week, with both English and Spanish language options.
 - Metro introduced implicit bias training to all Metro Transit Security officers in 2020. The goal of implicit bias training is to learn about one's default assumptions about other people, such as race, and to learn how to eliminate potentially discriminatory behavior. Disabilities sensitivity and awareness training, including sighted guide training and hands-on travel by wheelchair experiences is also a requirement for new security officers
 - Metro's Emergency Security Operations Center will be ready for occupancy in 2024. The Center will improve Metro's physical security presence, bus and rail incident response and coordination with law enforcement and fire response partners, operational monitoring systems, communication network infrastructure, and emergency management functions. The Center will aid in the safe and secure movement of customers in time for major public events, such as the 2028 Summer Olympic and Paralympic Games.
 - In 2020, Metro enhanced the Transit Watch mobile app with Spanish language and the option for customers to anonymously submit incident events to Metro security dispatch via text and photo upload, and to receive push notifications about critical alerts.
 - Metro Transit Security established a training unit to ensure security officers are trained appropriately to protect customers, employees, and infrastructure. Metro Transit Security will be procuring body-worn cameras for its security officers to document incidents, ensure transparency, and act as a deterrent.

[Photo: C3 Team members speaking with and/or helping a person experiencing homelessness.]

[Data Visual or integrate this into the text: The most frequently-occurring crimes are seeing decreasing rates: Larceny (2018 - 829 cases; 2020 - 383 cases) and battery (2018 - 726 cases; 2020 - 651 cases). Less common crimes have seen incremental increases, including vandalism, trespassing, arson, homicide, and aggravated assault, including assault and battery of Operators. Source: Metro Safety, Security and Law Enforcement Dept, February 2021]

HOW IS METRO IMPROVING LEGIBILITY, EASE OF USE, AND TRIP INFORMATION ON THE TRANSIT SYSTEM? [Initiative 2.2]

- **Metro is improving design consistency across its Metro rail stations and transit centers, where customers may also transfer to other transit systems and modes to complete their journeys.** An easy-to-recognize, integrated systemwide design approach for all new Metro stations reflects a focus on the customer experience. Natural light illumination, wayfinding standards, kit-of-parts construction and materials provide important elements of continuity for customers. Integrated public art and sustainable landscaping, developed in consultation with surrounding communities, provide elements of variability and visual interest. Together, these elements provide a strong and positive customer experience, celebrate context-sensitive placemaking in communities, and ensure cost-effective decision-making. Metro's Systemwide Station Design Standards and Transfers Design Guide are applied daily to every capital transit station and corridor project in Metro's Measure R and M portfolios, Metro joint development and first/last mile projects, and all updates to Metro's existing stations, as well as the Better Bus Program.

[Photo with notations of design highlights: Extract from Factsheet at <https://media.metro.net/2020/Systemwide-Design-Fact-Sheet.pdf>]

- **We're improving the experience when waiting for the bus.** Metro's Better Bus Program has launched a series of pilot programs in 2021 to test improvements, such as e-paper passenger information, lighting, high contrast surface applied tactile elements, and other customer amenities at select bus stops. Better Bus also looks beyond these pilots at long-term, enterprise-wide improvements that will require systems change and ongoing funding sources. For example, only about a quarter of bus stops served by Metro have shelter, and providing shade at the remaining bus stops will require larger investment and new partnership models with cities. In addition, the Metro Transfer Design Guide provides local jurisdictions with tools to help improve the bus waiting area. These changes will not happen overnight, but Metro is formalizing and coordinating these efforts for the benefit of customers.

[Photo: Across Metro's service area, of the 13,802 bus stops served by Metro, only 59 bus stops have dedicated, pedestrian lighting. Lighting improvements is a CX Plan priority. (include photo of bus stop with solar lighting and push-button lighting, used on page 39 in the CX Plan at metro.net/cxplan)]

[Photo of an Outfront/Decaux bus stop.]

[Sidebar. Title: Bus Shelters Two hours to install. Months to plan and approve.]

The process of planning, approving, and installing bus shelters is complex. Each of the 88 cities in LA County has its unique administrative process.

Take the City of Los Angeles for example. The Bureau of Street Services (BSS) manages its bus shelter program with Outfront/Decaux, the firm chosen by L.A. to manage, install, maintain and sell outdoor advertising on bus shelters, the revenues of which pay for the shelters.

To determine that the location is technically/physically suitable for a shelter, Outfront/Decaux:

1. Uses Metro's ridership data and traffic data from L.A. and the Bureau of Street Services to ensure that bus shelters are placed citywide in all 15 City Council Districts, with geographic equity in mind.
2. Surveys the site to check for ADA compliance, nearby utilities, manholes, trees, driveways, store front and/or other sidewalk elements.
3. Works with local community groups such as Neighborhood Councils, the homeowners' association, the businesses in the vicinity of the proposed bus stop, the chamber of commerce, etc., to build consensus and support.

Once deemed suitable, then:

1. The local City Council office needs to pre-approve each site.
2. Next, eight city departments need to sign off on a permit.
3. Occasionally, a public hearing is required.

Once approved, the actual bus shelter installation takes roughly two hours. In LA City, the entire process could take anywhere between 6 months and years. The process varies for each city.

Source: Outfront/Décaux

Photo of new vinyl seating. Caption: Metro Arts and Design designed unique new Sunrise/Sunset bus seat covers to create an attractive environment and are easier to clean. Vinyl Sunrise/Sunset seat covers have been installed on 65% of all rail vehicles. Metro currently has 181 new buses with the vinyl seats, with 246 more buses ordered. Installation on the bus fleet began in Spring 2021.

Photo of onboard art poster. Caption: Local artists were commissioned to uplift the customer experience through onboard art posters and digital displays. These artworks enrich the customer experience, advance cultural equity, and respond to Los Angeles County's vast and evolving cultural landscape.

- **We're making it easier to access information:** Metro is exploring ways to make information more accessible to customers when, how, and where they need it. For example, Metro partnered with Transit app in 2020 to give more trip-planning and fare payment choices to customers. The Transit App, Metro's official smartphone app, offers customers real-time arrival information, options to get around (i.e. regional transit systems, bike share, scooters, ridehail), real-time tracking of vehicles, trip planner, real-time crowding information, and service alerts.

[Photo: Transit app interface on a smartphone. Caption: In May 2020, Metro publicly announced Transit app as its official app and has seen 96,743 downloads as of Feb 2021. Averaging 53,739 active users weekly.

Source: Transit app, February 2021]

We're bringing fare payment to the smartphone: The TAP program brought an innovative "first" for fare payment in Los Angeles with the September 2020 launch of the TAP mobile app. This new technology gives customers a safe and contactless way to pay for transit. The TAP app can be used to buy fare for LA Metro and 25 additional TAP transit systems, manage TAP accounts including Reduced Fare and LIFE discounts, and plan trips using Trip Tools.

[Photo and caption: INCLUDE A PHOTO A LINE TOUCH SCREENS Metro has also introduced interactive information touch screens into the Metro Rail system, providing general and customizable arrival and trip-planning details. These units will showcase rider information, agency messaging, and paid advertisements which generate revenue for the agency. 100 screens have been installed along the Metro A Line – with E Line, C/LAX, and Regional Connector planned. Riders will benefit from digital screens installed at every Metro rail station by 2028.

- **We're improving the transit experience for customers with all levels of abilities.** Metro continues to improve accessibility for riders. Metro's design criteria now exceed minimum ADA and California Title 24 Accessibility Codes, where possible, to provide true usability. Walking surface tactile guidance wayfinding systems have been adopted into Metro Rail and Bus Rapid Transit design guidelines, which will be applied in all projects under construction, currently in design phase, and all future projects.

In October 2019, Metro piloted a new audio wayfinding technology in Union Station. The tool involves using a smartphone with an app and coded symbols installed adjacent to standard signs. Sweeping the phone scanner within the environment triggers the phone to read the sign out loud.

In Summer 2019, Metro also introduced TAP Wearables. These fare payment wearables include flexible wristbands and key fobs that are available for full fare and reduced fare riders in different sizes, great for both children and adults. TAP wearables function just like TAP cards while allowing customers with physical limitations more independence and ease when riding public transit.

[Side Bar: [TAP third-party vendor network expands to make TAP cards accessible in neighborhoods throughout LA County. In February 2021, TAP increased its third-party vendor network to 997 vendors, which include small and family owned businesses and large retail locations (7-Eleven, Walgreens, CVS, Ralphs). TAP vendors offer cash loading features and TAP account benefits to the unbanked through PayNearMe. TAP also offers cash loading features at TAP vending machines and bus fareboxes. Source: TAP, February 2021]

[Photo: Customer making a transaction at a TAP vendor location.

- **We're exploring the future of fare payment:** Looking ahead to advancing equity, Metro launched the Fareless System Initiative in 2020 to identify a pathway to implementing fareless transit on Metro Bus and Rail. Eliminating fares would lift a financial and logistical burden off of the majority of Metro customers. In May 2021, the Metro Board will consider approval of a pilot program. The pilot program will be phased, eliminating fares on Metro Bus and Rail for K-12 students starting August 2021, followed by low-income riders starting January 2022. The pilot will be an opportunity to learn about the operational impacts on bus, rail, Access Services (paratransit), system security and law enforcement, customer satisfaction, and the future of TAP and associated fare equipment.

As the payment industry evolves, Metro needs to build in flexibility and adaptability. This underscores the importance of releasing open APIs for payment so that Metro payment is available through a range of apps

and devices, and working with American Public Transportation Association and other industry stakeholders to adopt open and accessible technology standards. Metro transit information and payment should be ubiquitous and readily available.

- **We're providing free Wi-Fi Internet on the bus:** Metro introduced Wi-Fi capability on the entire bus fleet. With nearly 6 out of 10 bus customers having smartphones, Wi-Fi internet can help bridge the digital divide and improve the overall transit experience. Metro is exploring the possibility of expanding Wi-Fi to the rail stations, too.

[Photo: Image of the bus interior decal: Metro Wi-Fi Available.]

HOW IS METRO IMPROVING CUSTOMER SATISFACTION AT ALL CUSTOMER TOUCH POINTS? [Initiative 2.3]

- **We're putting the needs of our customers first:** Metro established its first ever Customer Experience Office and Customer Experience Plan (CX Plan), approved by the Board in 2020. The CX Plan looks at ways to improve the transit journey, with a special focus on the bus experience in all its component parts, such as providing accurate real-time information about bus arrivals and delays—and improved speed, ease of use, and safety and comfort (regional homelessness is a paramount issue for Metro – please see Goal 3). Progress is also being made to monitor customer experience performance measures and bolster a customer-experience mindset and culture at all levels of the organization, from front-line staff to Metro leaders.
- **We're keeping track of our Customer Experience Performance:** Annually, Metro carries out and publishes its on-board bus and rail rider survey. To augment these efforts, Metro is developing a more comprehensive Customer Experience survey and additional assessment methods to inform operations and agency improvements.

WHAT CHALLENGES AND OPPORTUNITIES SHOULD METRO CONSIDER?

A. Identify Sustainable Funding for Customer Experience, Transit Operations, Safety, and State of Good Repair:

Achieving sustainable funding for transit operations is critical. Full implementation of the recommendations in the Customer Experience Plan could range up to \$300 million per year. The pending start-up of the fareless transit pilot program will cost Metro up to an additional \$300 million annually to cover foregone fare revenue, increased transit service to match a potential surge in demand, and other increases in other operating expenses. Increasing transit service hours to achieve the full potential of the NextGen Bus Plan⁵, and tightening coordination of service with municipal transit operators to expand and improve journeys are additional improvements buoyed by widespread community support. New rail lines that will come online over the next number of decades will also incur significant operational expenses. Implementing the future recommendations of the Public Safety Advisory Committee will also require appropriate levels of resourcing. And, as noted in Goal 1, the state of good repair backlog is already close to \$3 billion. The pandemic has shown how Metro's current portfolio of funding sources, which relies primarily on sales tax revenues, is sensitive and vulnerable to major economic downturns. Metro should consider seeking new sustainable funding sources for transit operations as well as redoubling efforts to direct existing funding sources toward priority needs.

⁵ The Future Funding Scenario in the NextGen Bus Plan comprises 9.4 million revenue service hours (compared to the plan's baseline of 7 million revenue service hours).

- B. **Develop a Community-Based Approach to System Security and Law Enforcement:** The Public Safety Advisory Committee and the Metro Board will re-imagine Metro's approach to public safety on the transit system. The committee comprises 15 voting members from the community and 3 non-voting Metro employee members. The committee will also be consulted in the program design and implementation of the initiatives identified in a March 2021 Board resolution which directs at least \$40 million in the FY2022 budget for public safety and homelessness (e.g. transit ambassadors, elevator attendants, short-term shelter for homeless riders, etc.)

Current system security and law enforcement tactics may have a place in particular circumstances. However, for many other scenarios, a more holistic framework should be explored and operationalized, such as the deployment of unarmed ambassadors and flexible dispatch of non-law enforcement personnel with training in mental health and other backgrounds. The challenge, and opportunity, is for Metro to create a system security and law enforcement framework that embraces compassion and reflects the history, lived experiences, and expectations of Metro's customers and the broader community.

Progress on Goal 3

Enhance communities and lives through mobility and access to opportunity.

Transportation plays an integral role in supporting vibrant, prosperous communities and in enabling individuals and families to access jobs, essential services, education, and other social, cultural, and recreational opportunities. Through active collaboration with public and private sector partners, Metro will continue to work to make LA County's transportation system more accessible, inclusive, and responsive to the needs of the diverse communities it serves.

Progress at a Glance:

Metro understands that transportation is much more than buses, trains, and roads. Transportation is a means to strengthening communities and connecting them to each other. From developing pathways for local careers in transportation to fostering equitable development on transit corridors, Metro sees transportation as a means of uplifting communities and confronting the regional crises of housing affordability and homelessness.

Pathbreaking initiatives like WIN-LA, SEED School, Transit-Oriented Communities Implementation Plan, Joint Development policy, and the homelessness outreach teams are making a difference at the community and site-specific levels.

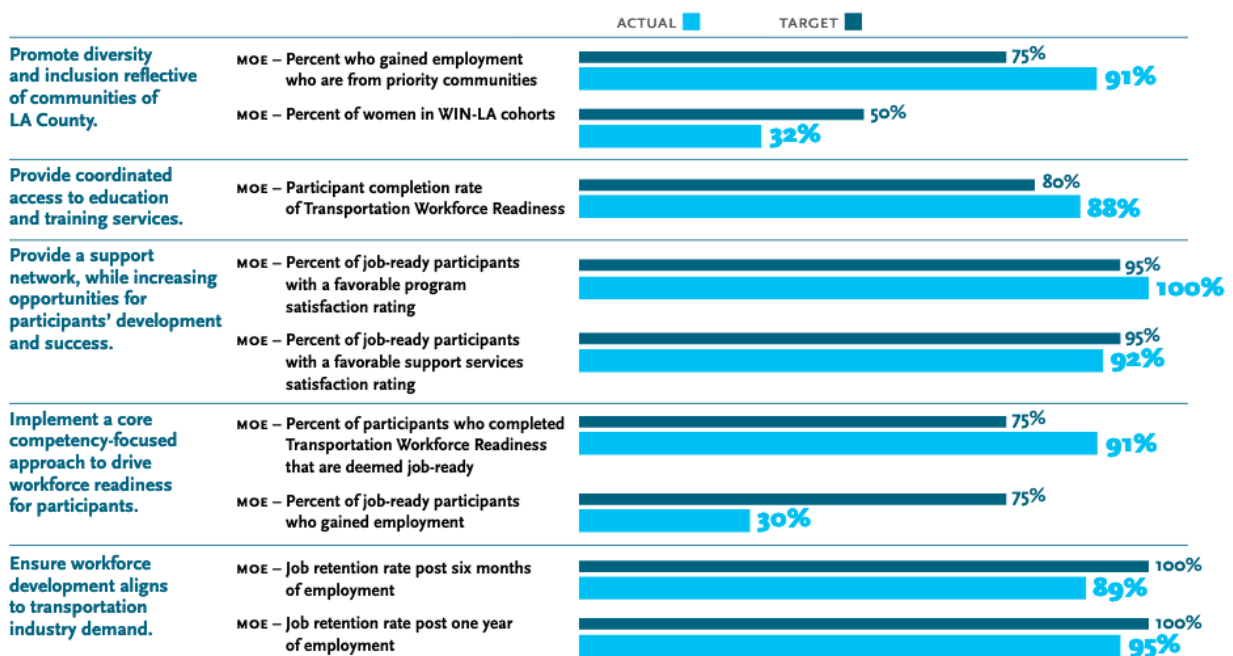
Looking at the bigger picture of Los Angeles County and its surrounding neighbors, greater attention must be paid to where people and jobs are strategically located in relation to the region's transportation system. Peer west coast regions like Vancouver, Seattle, and Portland have shown how the principle of aligning regional land use patterns and transportation planning can help set the foundation for robust transit ridership growth and decreased dependence on solo driving. Metro's multi-billion capital program is a transformational opportunity to strengthen the regional land use and transportation connection. However, if where people and workers are located remain spread out, unfocused, and disconnected from transportation infrastructure and services, then it is unlikely the world class transportation outcomes can be achieved. Transportation can shape land use, and land use can unlock the performance of the transportation system to improve access and opportunity to housing, employment, and other important destinations.

Metro can position itself to apply its holistic view of transportation to start the dialogue about the 'next generation' integration of regional land use and transportation planning in partnership with local, regional, and state partners. Activating world class transportation requires world class land use planning.

HOW IS METRO LIFTING UP LOCAL COMMUNITIES, AND CREATING JOBS AND CAREER PATHWAYS IN TRANSPORTATION? [Initiative 3.1]

- **We're training workers for today's transportation jobs:** According to the California Department of Finance, Los Angeles County is forecasted to see an absolute decline in the number of working-age adults through at least the next four decades. To address the impending labor shortage, Metro launched the Workforce Initiative Now (WIN-LA) program in 2017 to create pathways for working-age adults to go into construction, operations/maintenance, administration, and professional services jobs within the transportation industry from population groups that have faced historical barriers. Metro has developed requirements on locally funded procurements with contract values greater than \$5 million for contractors to hire WIN-LA program participants.

GOALS AND MEASURE OF EFFECTIVENESS



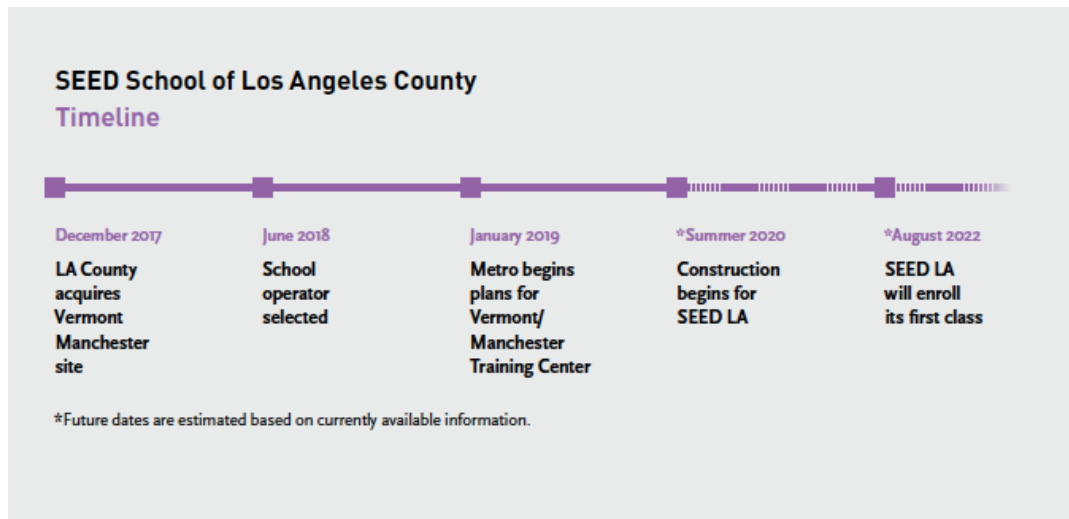
• MOEs from program inception through end of quarter

Source: WIN-LA Quarterly Report. 2020 Q1 (Los Angeles: Metro, 2019), 3. Source: WIN-LA Quarterly Report. 2020 Q1 (Los Angeles: Metro, 2019), 3.
http://media.metro.net/2020/WIN_LA_2020_Q1_fact_sheet.pdf

- **We're actively creating the opportunities for hiring locally:** Metro continues to implement the Construction Careers Policy, which encourages construction employment and training opportunities on locally-funded projects to those who reside in economically disadvantaged areas in the County, and the Project Labor Agreement, which sets national targeted hiring goals for federally funded projects with federal approval. Also, since 2011, Metro has advocated for reforms to federal local hire rules so that Metro can set requirements for bidders of federally-funded transit and highway projects to hire qualified local workers and businesses. Given that a high proportion of Metro's budget for operations and capital projects come from Los Angeles County residents' tax dollars, it makes sense for Metro to prioritize local employment. Metro is

actively engaging the Biden-Harris administration and Congress to reinstate the local hire program. Metro's advocacy efforts had paid off in 2015 when the federal government launched the Local Hire Pilot Program, which concluded in 2017.

- **We're setting the foundation for the next generation of transportation leaders:** Metro and LA County partnered in 2018 to create the SEED School of Los Angeles County which aims to prepare youth for college in transportation-related studies. Ground-breaking for the public boarding school took place in October 2020 on a Metro-owned site at the corner of Vermont and Manchester Avenues. The school is anticipated to open in August 2022. Development of the curriculum is underway.



HOW WILL METRO LEVERAGE ITS TRANSIT INVESTMENTS TO CATALYZE TRANSIT-ORIENTED COMMUNITIES AND HELP STABILIZE NEIGHBORHOODS WHERE THESE INVESTMENTS ARE MADE? [Initiative 3.2]

- **We're leveraging our properties to support new affordable housing within walking distance to high quality transit:** Metro understands that every transit passenger facility is an opportunity to embrace compact, mixed-use, and inclusive development, such as affordable housing. In 2015, Metro adopted the Joint Development Policy, one of the most progressive affordable housing policies of any transit agency in North America. To date nearly 2,200 units of housing have been built on Metro property, more than 1/3 of which are affordable to households earning less than 60% of the area median income. The number of new housing units will more than double in the next few years with projects currently in negotiations, including more than 1,000 additional affordable units. There are currently 14 active joint development sites in various stages of planning and entitlement. Metro's joint development portfolio is anticipated to grow by more than 40 new sites as a result of property acquisition for new transit lines. These new sites could represent as many as 10,000 new housing units. Given the severe housing crisis in the County, the Board and community advocates have expressed a paramount need for Metro to use its resources and authority. Metro will bring forward an updated Joint Development Policy to the Board for consideration in June 2021 that will strengthen and streamline Metro's role in facilitating affordable housing production.
- **We're helping communities build capacity and find the right opportunities for transit-oriented development:**
Metro adopted the Transit-Oriented Communities (TOC) Policy in 2018 and TOC Implementation Plan in 2020, which authorized the preparation of TOC Corridor Baseline Assessments for all Metro transit corridors,

starting with Measure M transit corridors. Prepared in partnership with municipalities and with deep stakeholder engagement, these assessments will highlight opportunities for communities to leverage transit infrastructure and to identify potential corridor-wide and neighborhood vulnerabilities and risks. Metro will also support municipalities to build staff capacity and secure additional funding through the TOC Grant Writing and Technical Assistance programs.

[Sidebar: Since 2011, Metro has funded 32 municipalities through the TOD Planning Grant Program to prepare and adopt 43 transit supportive plans affecting 95 Metro Rail and Metrolink station areas in Los Angeles County.]

[Photo: Transit-oriented development, joint development on Metro sites, etc.]

HOW IS METRO COMMITTED TO GENUINE PUBLIC AND COMMUNITY ENGAGEMENT TO ACHIEVE BETTER MOBILITY OUTCOMES FOR THE PEOPLE OF LA COUNTY? [Initiative 3.3]

- **We're strengthening our efforts to be trusted community partners.** Metro's collaborations with organizations serving communities help improve the quality and reach of public engagement. Community-Based Organizations (CBOs) are a vital part of the economy, social service networks, and communities that Metro serves. Furthermore, they are key players in civic life, public policy, and public program provision. Metro has prepared the *CBO Partnering Strategy: Elements for Successful Partnering in Professional Services* to help advance equity by leveraging the expertise and value that CBOs bring to Metro projects and, most critically, to local communities. The strategy outlines ways for Metro to equitably and consistently engage CBOs for professional services, and ways to support CBO capacity building so that they can work with Metro.

Further, Metro endeavors to provide convenience and accessibility in public processes so that that diverse voices can contribute to decision-making about current and future services. When in-person meetings were no longer viable options during Stay-at-Home orders and social distancing requirements, Metro quickly transitioned to online meetings, with telephone call-in options for those with limited internet access. Metro is also increasingly using random sample surveys to ensure that we reach a representative and inclusive sample of community members and not just those with time and resources to participate in public processes.

HOW WILL METRO PLAY A STRONG LEADERSHIP ROLE IN EFFORTS TO ADDRESS HOMELESSNESS IN LA COUNTY? [Initiative 3.4]

- **We're at the frontlines of regional homelessness:** Homelessness is a pervasive issue throughout Los Angeles County. Every day, numerous persons experiencing homelessness seek shelter in the Metro system. Metro recognizes that homelessness is not a crime and that the predicament of each person is unique. And, because customers tell us that behaviors and conditions related to untreated mental illness, addictions, and homelessness negatively-impact their use of transit, Metro has stepped up its role in bringing assistance and resources to these vulnerable individuals. In 2017, Metro began a partnership with the LA County Department of Health Services and People Assisting the Homeless to deploy County-City-Community (C3) teams to engage and connect individuals experiencing homeless on the Metro system with appropriate services. The C3 teams is comprised of nurses, substance abuse counselors, mental health clinicians, former homeless individuals, and other outreach workers. To date, the C3 teams have provided homeless outreach to over 8,000 persons, of whom 2,700 have been connected to permanent housing solutions, and now the C3 program is being expanded through funding from the Customer Experience Plan.

[Photo: C3 ambassador working with the unhoused at a bus or rail stop.]

In April 2020, Metro launched Operation Shelter the Unsheltered, a collaborative effort between Metro Transit Security (Metro-contracted law enforcement partner), the LA County Department of Health Services, The Dream Center, and LA DOOR outreach teams to address heightened numbers of homeless persons at six Metro Rail stations. As of April 28, 2021, Metro and its partners have connected 783 individuals to housing accommodations. In February 2021, the Metro Board extended the contract of the C3 homeless outreach teams to 2023 and approved funding for a four-month emergency shelter pilot program. And the Customer Experience program will be extending funding into FY22.

[Infographics suggested: According to the January 2020 Greater Los Angeles Point-in-Time Count: LA County saw 66,436 people experiencing homelessness, a 12.7% increase from 2019. Even though on average 207 people transition out of homelessness every day, 227 people become homeless. Seniors 62+ increased by 20% and make up 9.9% of the homeless population. Metro saw a 19% increase in Transition-Aged Youth (18-24) homelessness. Youths make up 7% of the homeless population. Incremental improvements are being made: 18,395 people experiencing homelessness in L.A. County were sheltered in 2020, up from 14,722 the previous year.

Sources: Greater Los Angeles Homeless Count, 2020 Results
Homeless Count Key Messages (LA Homeless Services Authority)

WHAT CHALLENGES AND OPPORTUNITIES SHOULD METRO CONSIDER?

- A. **Shape a Transit-Oriented Los Angeles County:** Metro is among the leaders in the nation in having established a robust policy interest in fostering equitable transit-oriented communities. Building on the strong foundation set by the Transit-Oriented Communities Policy and Implementation Plan, and Joint Development Policy, Metro is uniquely positioned to start a dialogue about the ‘next generation’ integration of regional land use and transportation planning in partnership with local, regional, and state partners.

Metro’s multi-billion capital program is a transformational opportunity to strengthen the regional land use and transportation connection. Metro’s Long Range Transportation Plan shows that investing in new transit infrastructure and services and introducing supportive policies can incrementally decrease residents’ dependence on solo driving⁶. One additional supportive tactic that should be considered is for Metro to convene partners to strategize on regional land use planning needs and opportunities that encourage residential and job growth to be strategically focused on Metro’s bus and rail network. The opportunities may include:

- Collaborating with SCAG, and local and state partners to shape future iterations of regional growth projections and allocations in Los Angeles County
- Collaborating with SCAG to convene policy and research interests on regional land use and transportation integration in Los Angeles County and adjoining counties

⁶ The LRTP forecasts that the single occupant vehicle 24-hour mode share will decrease to 43 percent in 2047 from 46 percent in 2017, assuming scheduled build-out of capital projects in the sales tax measures and implementation of the following tactics: \$0.20/mile road usage charge, fareless transit for Metro and municipal transit services, increasing bus speeds by 30 percent, and reducing travel time on first and last mile connections by 20 percent.

- Monitoring regionally-significant land use proposals in Los Angeles County that may affect Metro's system performance and performance targets (e.g. solo driving mode share, Vehicle Miles Traveled, transit ridership)
- Amplifying active efforts to monitor and engage, as appropriate, on legislation that supports Metro's policy interest in fostering equitable regional land use and transportation integration in partnership with Los Angeles County municipalities.

[Photo: A TOC along the E Expo Line or L Gold Line]

Progress on Goal 4

Transform LA County through regional collaboration and national leadership.

Metro has been entrusted with improving LA County's transportation system, thereby helping the region to realize its full economic potential and delivering greater access to opportunity and improved quality of life for the County's 10 million residents. Metro shares the region's commitment to environmental sustainability and will take a strong leadership role in managing and building a resilient mobility system that effectively reduces greenhouse gas emissions and helps to address public health issues while moving people throughout the County. Achieving the vision and goals laid out in this Plan will require cooperation, coordination, and collaboration among Metro and its many partners and stakeholders.

Progress at a Glance:

The ultimate strength of a region lies not with what one single agency can do. Metro understands leadership is in large part about bringing diverse interests to the table, creating the conditions for consensus and for leaders to step forward, and holding each other to account. The NextGen Bus Speed Engineering Working Group is an example of Metro working in partnership with the Los Angeles Department of Transportation to realize the full benefits of the bus network restructuring under the NextGen Bus Plan. The Freight Working Group is another leading example of Metro convening diverse public, private, and community-based interests to shape a vision for regional goods movement that will take into greater account environmental and equity objectives.

Another component of leadership is to inspire and push for change to policy agendas at the state, regional, and national levels. The Office of Extraordinary Innovation has sparked a new way of thinking and doing within Metro and in the public transportation industry nationally and globally. When called upon, Metro has stepped up to serve in national efforts to respond to the COVID-19 pandemic and the federal administration transition. Metro's corporate sustainability and climate action efforts are ambitious and aligns well with the State of California's directives.

Regional leadership is even more important as the County emerges from the COVID-19 pandemic and economic downturn, and turns its attention to other crises, including global climate change. Ambitious action is required at all levels of government, the private sector, and individuals. Metro can play a leading role on this front by prioritizing investments and policies based on reducing county-wide vehicle miles travelled.

Longstanding policy tensions and dormant policy areas await resolution – a perfect role for Metro to play. As noted in Goal 1, the highway network must be a component of a broader systems mobility planning effort that includes setting a price on congestion. As noted in Goal 2, reprioritizing funding for operations and customer experience must be given more weight. As noted in Goal 3, the chronic shortage of affordable housing supply in the core areas of the County combined with the continued dispersal of regional growth to outlying areas will only stoke the demand for long distance driving and community demands for expanding highway capacity and long-haul transit services. Metro can play the convener role and be a thought leader on these and other issues. In addition, a medium-term legislative strategy can bring into sharp relief the necessary, but currently missing, tools to help Metro and its partners move on these regional challenges and achieve world class transportation outcomes.

HOW WILL METRO WORK WITH PARTNERS TO BUILD TRUST AND MAKE DECISIONS THAT SUPPORT THE GOALS OF THE VISION 2028 PLAN? [4.1]

- **We're convening partners from all levels of government to coordinate and exchange knowledge.** Metro convenes and participates in many working groups on numerous initiatives. Some examples that show the breadth of engagement are:
 - **Coordination with municipalities on bus speed:** the LADOT/Metro Bus Speed Engineering Working Group was established in 2019 to identify improvements for bus priority and opportunities to coordinate with other jurisdictions and transit operators. Early accomplishments arising from this working group include the Flower Street pop-up bus-only lane (which is now permanently installed), the Aliso bus-only lane, and the 5th Street and 6th Street bus-only lanes in downtown Los Angeles. Corridors under consideration for bus priority lanes include Alvarado Street (7th Street to Sunset Boulevard), Grand Avenue (southbound), and Olive Street (northbound). Metro is also exploring the viability of installing transit signal priority transponders on its entire 2,300 bus fleet.
 - **Goods Movement Strategic Plan Freight Working Group:** This working group was established in 2019 to inform Metro's preparation of the Goods Movement Strategic Plan (adopted 2021). Given the economic and environmental impacts associated with goods movement in Los Angeles County, the working group has over 60 representatives from all councils of governments in the county, the two ports, the air district, state and regional transportation agencies, private sector interests, and a community-based organization. The working group was instrumental in developing the vision and initiatives in the plan. Moving forward, the Freight Working Group will convene to support the implementation of specific initiatives and to discuss ongoing issues about regional goods movement in Los Angeles County.
 - **Knowledge Exchange on Transportation Technology:** With the rapid evolution of transportation technology, Metro benefits from staying engaged on these topics and playing a role in shaping the use of technology in advancing Vision 2028. For example, the Arterial Intelligent Systems Committee, made up of local public works engineers, increases mutual awareness of new technology applications that improve arterial operations and lessons learned from implementing and operating Intelligent Transportation solutions. At a broader level, Metro is a signatory, alongside SCAG, LADOT, Caltrans, and LA County Public Works, of the Coalition for Transportation Technology, which has developed a transportation technology strategic action plan and encouraged the sharing of technological information among partners. The Coalition provides an important forum for discussing the local and regional impacts of technology advancements, such as autonomous vehicles, and issues around regional consistency and interoperability.
- **We're integrating climate action and sustainability into our operations:** Metro recognizes the impacts of climate change. The 2019 Climate Action and Adaptation Plan sets a commitment to reducing greenhouse gas emissions from Metro's operations by 79% below 2017 levels by 2030 and by 100% by 2050. Metro's greenhouse gas emissions have declined by nearly 12% from 2010 to 2017, despite a nearly 4% increase in total transit services. In 2020, Metro took a further step by adopting the Moving Beyond Sustainability Plan, which includes additional holistic actions in the areas of: water quality and conservation, solid waste, construction materials, energy resource management, emissions and pollution control, climate adaptation, and economic and workforce development. These commitments are in addition to the Metro Board's goal to fully transition its bus fleet to zero emission buses by 2030, a full decade ahead of state requirements (the Board approved the Zero Emission Bus Rollout Plan in March 2021).

[Photo: Division 24 Gold L Line. LEED Certified building] See the Metro 2020 Moving Beyond Sustainability Strategic Plan for a full list of LEED-certified Metro projects.

[Data visual: Suggesting a chart:

Metro's Vehicle Fleets

The 2019 Climate Action and Adaptation Plan (CAAP) assesses emissions from Metro's diverse fleet both now and in the future. Metro has varying levels of control over our fleet:

- > Directly Operated Bus Fleet: About 2,400 buses owned and directly operated by Metro
- > Rail Vehicle Fleet: 104 heavy rail cars and 203 light rail cars operated on six Metro rail lines
- > Non-Revenue Fleet: 1,500 vehicles that support Metro operations but do not carry transit passengers
- > Contracted Bus Fleet: 175 buses operating under contract with Metro
- > Vanpool Fleet: 1,300 vanpool vehicles leased and operated by third parties subsidized through the Metro Vanpool Program

Metro also uses a variety of vehicle types and fuel sources:

- > Internal Combustion Vehicles: Vehicles using diesel, gas and compressed natural gas (CNG) in operations
 - > Electric Vehicles: Rail vehicles operating on electricity delivered by overhead catenary or third-rail systems, and battery electric buses (BEBs) and battery electric vehicles (BEVs) powered by electricity stored in a battery
- Source: 2019 Climate Action and Adaptation Plan (Los Angeles: Metro, 2020), 10.]

HOW WILL METRO HELP DRIVE MOBILITY AGENDAS, DISCUSSIONS, AND POLICIES AT THE STATE, REGIONAL, AND NATIONAL LEVELS? [Initiative 4.2]

- **We've taken on national leadership roles when called upon:** At the outset of the COVID-19 pandemic, Chief Executive Officer Phil Washington was appointed chair of the American Public Transportation Association's Mobility Recovery and Restoration Task Force. In late 2020, the Biden-Harris transition team appointed Mr. Washington to lead the team reviewing the Department of Transportation, National Transportation Safety Board, the National Railroad Passenger Corporation (Amtrak), and the Federal Maritime Commission.
- **We've have embraced the spirit of innovation:** When Chief Executive Officer Phil Washington created the Office of Extraordinary Innovation (OEI) in 2015, it sparked a new way of thinking and doing in the public transit industry. Many others soon followed his lead in embedding innovation into strategic planning and day-to-day operations. OEI initiatives, such as the Vision 2028 Strategic Plan, Unsolicited Proposals program, Public Private Partnerships program, Traffic Reduction Study, and Mobility on Demand pilot, have catalyzed and strengthened interdepartmental collaboration within Metro. Metro staff actively exchanges lessons learned with peer agencies around the country and beyond. Metro's Chief Innovation Officer is on the steering committee for the American Public Transportation Association's Chief Innovation Officer Peer Exchange, leading regular meetings on innovations in transit. Metro staff have published articles and white papers on various Metro innovations, and regularly speak to peer audiences in Australia, Singapore, The United Kingdom, and the European Union.

- **We're advocating for supportive legislation:** The successful implementation of Vision 2028 requires supportive legislation from the state and federal governments. Metro's 2021 legislative program includes the following priorities:

Examples from the Federal Legislative Program:

- Support the reauthorization of federal surface transportation authorization legislation (the current FAST Act expires on September 30, 2021)
- Seek to restore Obama-era reforms to federal local hire rules
- Support reforms to federal policies and funding that would benefit bus operations
- Advocate for policies and funding to assist in addressing regional homelessness

Examples from the State Legislative Program:

- Support the transportation funding programs created and expanded under Senate Bill 1
- Support increased transportation funding, including from the state's cap and trade program
- Support and sponsor legislation that will address transit customer experience, project delivery, climate action, affordable housing production, regional homelessness, ExpressLanes expansion, etc.

- **We're rethinking our highway funding programs:** Timing is everything in transportation. Both the Biden-Harris administration and Metro are willing to rethink and modernize the way transportation is done. The proposed Biden-Harris American Jobs Plan, released in early 2021, would greatly expand transit investments to a level that is greater than that for roads and highways. Locally, the Metro Board, in 2020, appointed a subcommittee of Board staff to identify recommendations that Metro should take to modernize its Highway Program, taking into account Board-adopted policies, such as the Complete Streets Policy, Active Transportation Strategic Plan, and First/Last Mile Strategic Plan. The main revisions proposed expand eligibility for multimodal projects that support Complete Streets, and projects that ease congestion by reducing VMT. In March 2021, the Board approved for public comment the draft amendments to the Measure R Highway Program eligibility criteria and Measure M Guidelines, Section X Multi-Year Programs (Highway Subfunds). Following public input, a final revised set of program criteria and guidelines will be presented to the Board for adoption in June 2021. Metro's effort represents an incremental step in the right direction.

WHAT CHALLENGES AND OPPORTUNITIES SHOULD METRO CONSIDER?

- A. **Take Regional Climate Action:** The stage is set for an alignment of federal, state, and local responses to global climate change. One of the priorities of the Biden-Harris Administration is to confront climate change at the national and global levels⁷. The State of California has been at the forefront with climate legislation, such as SB 375 and SB 743. In Los Angeles County, on-road transportation is responsible for one-third of the county's greenhouse gas emissions⁸. Building on the 2019 Climate Action and Adaptation Plan and 2020 Moving Beyond Sustainability Plan, Metro can be a trailblazer by integrating regional vehicle miles travelled reduction objectives in future updates to Vision 2028, policies, funding programs, and investment decisions.
- B. **Match Actions to Policy:** The process of aligning Metro's policies, investments, and funding across the portfolio of mobility services is an incredible challenge. The recent effort by the Board to expand the eligibility of Metro's highway programs shows that it is possible to revisit past commitments and entertain

⁷ In April 2021, President Biden pledged to cut U.S. greenhouse gas emissions by at least 50% below 2005 levels by 2030. The new target is a near doubling of former President Obama's target to cut emissions by 26 to 28 percent.

⁸ <https://www.ioes.ucla.edu/wp-content/uploads/report-card-2015-energy.pdf>

some degree of reform. The next step is to confront the longstanding tension of expanding highway capacity, such as potential segments of I-605 and I-5, and the aspirations for reducing solo driving and shrinking the County's climate footprint. As noted in Goal 1, the planning of the highway network must be a component of a broader mobility system that includes setting a price on congestion and incentivizing non-solo driving trips. As noted in Goal 2, reprioritizing funding for operations must be given more weight. And, as noted in Goal 3, the continued dispersal of regional growth to the outlying parts of the County will only serve to stoke the demand for long distance driving and the demand for expanding highway capacity and long-haul transit. Metro can choose to strike a new course, or continue with the status quo and expect a different outcome.

- C. Prepare a Medium-Term Legislative Strategy:** Building on Metro's annual legislative program, a medium-term strategy (e.g. four or five-year horizon) will help prioritize and target specific legislation and, if accompanied by an updated Vision 2028, would sharpen alignment with policy.

Progress on Goal 5

Provide responsive, accountable, and trustworthy governance within the Metro organization.

To deliver the best possible mobility outcomes, Metro itself—as an organization—must be positioned to succeed. Responsive, accountable, and trustworthy governance is critical to continue building credibility with decision-makers, public and private sector partners, customers, and employees. By improving its business practices, Metro can perform more effectively and adapt more nimbly to the changing needs of its customers.

Progress at a Glance:

Metro embraces the enormous responsibilities as a steward of billions in funding generated by local taxpayers and from grants awarded by the state and federal governments. This is why Metro is constantly looking at ways to deliver better value for the travelling public, such as the Better Bus program and NextGen Bus Plan, reviewing opportunities to manage the cost of rail projects, and harnessing the knowhow and expertise of the private sector for the public good. Metro is also actively improving how it works internally and with external partners, whether it is developing a data management policy, creating opportunities for local businesses to work with Metro, or nurturing an inspired workforce with safety top of mind and practice.

The visionary outcomes in Vision 2028 will, however, remain aspirations until there is full alignment, from top to bottom, within the organization in how decisions are made and actions are coordinated. It starts with a strategic review of the way Metro is organized internally and making sure staff resources and decision-making processes are working in sync to make high quality public policy and fiscal decisions. It involves standing up a centralized hub to coordinate basic data collection and planning analytics so that decision-makers have ready access to crucial information to aid deliberations. It also includes ways to accelerate the retention of institutional knowledge and creating leadership pathways to counteract a rapidly aging workforce and declining labor pool.

On the fiscal front, a true organizational alignment to Vision 2028 means delivering to the Board a unified medium-term financial strategy in a Short Range Transportation Plan that shows the match between funding levels and investment needs. It also means exploring best practices to assess the full life-cycle costs of major capital projects and to maximize their benefits from planning to construction to operations to asset management.

Delivering world class transportation requires an organization that is ambitious, innovative, and willing to learn and adjust its priorities in the face of changing circumstances while still keeping track of its mission.

HOW WILL METRO LEVERAGE FUNDING AND STAFF RESOURCES TO ACCELERATE THE ACHIEVEMENT OF GOALS AND INITIATIVES PRIORITIZED IN THIS VISION 2028 PLAN? [Initiative 5.1]

- **We're securing billions of dollars in state and federal transportation grants for the county:** Metro is a leader nationwide with success in securing billions of dollars in state and federal funding sources in recent years. Metro has brought in over \$3 billion in state and federal grants since March 2020, and is currently managing over \$9 billion in grant activities. This activity is an extensive and crucial for the delivery of Metro's multibillion capital program.

HOW WILL METRO EXERCISE GOOD PUBLIC POLICY JUDGMENT AND SOUND FISCAL STEWARDSHIP? [Initiative 5.2]

- **We're exploring ways to better manage the rising cost of rail projects:** Metro has been undertaking research to identify key factors escalating rail project costs and ways to manage costs, schedules, and scopes, while still preserving the project's intended benefits. Some of these cost factors are: the higher risk associated with megaprojects priced into contracts, increasing technological complexity, rising contractor claims, grade separations, lengthy environmental review processes, project management and soft costs, mitigation of community impacts during construction, and so on. Metro's ambitious capital program, including the Twenty-Eight by '28 initiative, should be regularly reviewed and, where necessary, be adjusted to current and forecasted fiscal realities (see the Challenges and Opportunities section for more discussion).
- **We've reimaged the bus network to deliver more effective service for more of our existing customers:** The NextGen Bus Plan, the culmination of three years of extensive community engagement and data analysis, restructured the Metro bus network for the first time in a quarter century. The NextGen Bus Plan will deliver a faster and frequent bus system that better serves Los Angeles County (see Goal 1 for more details). For areas of the County that may see reduced bus coverage or frequency, Metro is deploying Metro Micro, an on-demand service using shuttle vans that provides more customized rides. 6 Metro Micro zones were launched in 2020, and 3 more will be launched by end of 2021. Metro continues to work with its municipal partners to plan for and implement transit priority measures, such as bus lanes and signal priority, so that the benefits of restructuring the bus network are maximized and sustained over the long term.
- **We're working to review and improve the cost efficiency of the Metro Bike Share Service:** In 2020, Metro completed an internal audit of the Metro Bike Share Program, which has been providing first and last mile connections in multiple municipalities in the County since 2016. One of the findings was that the current firm-fixed-price contract, while putting maximum risk on to the contractor for managing costs, is not the most suitable in this specific instance. The reason being the milestones were developed by the contractor after the execution of the original contract and subsequent contract modifications made it challenging to determine if the fixed price was based on reliable estimates. The audit determined that cost-reimbursement types of contracts, which provide for payment of allowable costs as they are incurred, should be assessed and considered. They could allow Metro to exercise more control and oversight over the performance of the contractor. A recommended future program option will be presented to the Metro Board in Summer 2021 (the current contract expires in July 2022).

HOW WILL METRO DEVELOP A TRANSPARENT DATA MANAGEMENT POLICY THAT ADDRESSES OPEN DATA, DATA STORAGE, AND DATA PROTECTIONS? [Initiative 5.3]

- **We're developing a data management policy:** Like all public agencies, Metro creates, stores, and manages a lot of data, such as TAP card transactions, vendor information, and financial information. Progress is being made on a data management policy that will, among other features, provide a basic template for departments across the agency to structure and manage their respective datasets. A common data warehouse is being explored as a common repository for all data in the agency.

HOW METRO WILL APPLY PRUDENT COMMERCIAL BUSINESS PRACTICES TO CREATE A MORE EFFECTIVE AGENCY. [Initiative 5.4]

- **We're harnessing private sector innovation for the public good:** Good ideas about how to deliver a world class transportation system can come from both the public and private sectors. Metro is able to tap into private sector know-how in the following ways:
 - **Unsolicited Proposals:** Proposers can submit an unsolicited proposal for small and large projects that may improve mobility and/or the customer experience. Proposals are reviewed by Metro, and if a concept offers promise, Metro may seek to implement it or ask for more information to conduct a comprehensive assessment. Proposals can lead to no cost proof-of-concepts to help test new approaches and technologies, and inform the case for implementation. A recent example is the Los Angeles Aerial Rapid Transit project – a gondola system connecting Union Station and Dodger Stadium that was submitted to Metro by a private consortium in 2018 (for this project, Metro is acting as the lead agency for the environmental review process, which will include the evaluation of the proposal and alternatives).
 - **Public Private Partnerships (P3s):** For major capital projects, P3s can be a means to improve the delivery and performance of major capital projects by way of innovative project financing, project design, and operations. The Sepulveda transit corridor project is an example of a P3 initiative.
 - **Joint Development:** Metro accepts unsolicited proposals for joint land use development on Metro-owned sites. Joint development can be a win-win scenario for creating equitable transit-oriented development and generating transit ridership (see Goal 3 for more details about Metro's Joint Development Policy and pending update).
- **Exploring new ways of mitigating risk and maximizing the public good:** For megaprojects costing in the billions of dollars and having a significant amount of technical complexity, striking the balance on risk, innovation, and public benefit is crucial. For the Sepulveda Transit Corridor Project, the Metro Board approved contracts with two private sector firms for Pre-Development Agreement work using a first-of-its kind public-private model. This megaproject will connect the San Fernando Valley with the Westside and eventually LAX via a high-speed, high-capacity transit line. The capital cost could range from \$6 billion to \$11 billion. Metro will now initiate the environmental review process where concept designs will be advanced and refined through extensive community engagement and technical analysis. Metro retains the right to continue or terminate either partnerships depending on the acceptability of a Locally Preferred Alternative (LPA) to be selected by the Metro Board. Should a LPA be selected, one of the private sector teams may have an opportunity to submit a proposal to implement the project. Pre-Development Agreements enable early contractor involvement to allow for innovations in design, engineering, construction methodology, financing, and operations.

[Data Visuals: Unsolicited Proposals statistics]**Overall UP Statistics**

	Total	Since 2018
Received	244	149
Advanced to Phase II	31	14
Advanced to Proof of Concept	9	4
Advanced to Implementation/Implemented	19	8

List of UP Projects Implemented/in Implementation (2018-2021):

2018-Present	Proposer
Artificial Ivy Anti-Graffiti	Intuitive Real Estate
Cybersecurity Program (partial)	FireEye
Los Angeles Aerial Rapid Transit	LAART, LLC
Automated Bus Lane Enforcement	CarmaCam
Travel Rewards	7 Different Proposers (Think You Can Solve Traffic?)
Augmented Reality Training (deferred)	Knowledge Architects
Project Neutral Visuals (deferred)	Alta Planning + Design
Elevator Inspections	BV-NEIS

List of Proofs of Concept as a result of an Unsolicited Proposal (in order of receipt):

2018-Present	Proposer
Automated Bus Lane Enforcement	CarmaCam
Wayfinding for Visually Impaired	Navilens
Lightweight Congestion Pricing (deferred)	ClearRoad
Anti-microbial/viral/bacterial/fungal Copper	The Clean Copper Company

HOW WILL METRO EXPAND OPPORTUNITIES FOR BUSINESSES AND EXTERNAL ORGANIZATIONS TO WORK WITH US? [Initiative 5.5]

- **We're making ways for small businesses to help us build a world class transportation system:** Between fiscal years 2018 and 2021, Metro awarded contracts to 2,329 small businesses for a total amount of \$1.2 billion, expanding the network of businesses that contract with Metro. Metro holds workshops and information sessions every month through the MetroConnect program on topics such as "How to Do Business with Metro" and "Meet the Primes." These sessions help build awareness about upcoming contracting opportunities and foster connections between prime contractors, sub-contractors, and buyers. While all meetings were conducted virtually in 2020, Metro was still able to engage over 6,000 individuals. Also, Metro continues to support the Transportation Business Advisory Council, comprising 21 minority or women-based business organizations, which provide advice on ways to meet or exceed women and minority business enterprise participation goals.

Metro expanded the Transitional Indirect Cost Rate Policy and pilot program in March 2020 in support of removing financial management barriers inhibiting new, disadvantaged and small businesses. The policy extends the opportunity for qualifying disadvantaged and small businesses voluntary use of a transitional rate of 115% for a conditional period of 12 months from initial contract award. The expansion of the policy to new cost reimbursable and firm fixed contracts furthers Metro's commitments to creating pathways for

disadvantage and small businesses to compete and realize economic benefits. As a result of the expanded policy and pilot program, the rate of participation increased by over 200% within the first year. Metro will continue to assess the pilot program.

In the spirit of continuous improvement and to better respond to the current economic distress caused by the pandemic, the Board directed staff to review Metro's Medium-Size Business Enterprise Program and Small Business Enterprise Program in January 2021, and to identify potential enhancements by April 2021.

HOW WILL METRO WILL FOSTER AND MAINTAIN A STRONG SAFETY CULTURE? [Initiative 5.6]

- **We're prioritizing employee safety:** The Law Enforcement Service Request, launched in 2019, is an internal Metro online program (accessible on all computers) that allows an employee to report incidents of harassment observed or experienced on the transit system. The requests are routed to the appropriate parties, such as law enforcement, for their action. Metro also completed the installation of barriers on buses for operators to address safety concerns. All new buses purchased are equipped with barriers and monitors as well.

Data Visual: Photo of operator sitting on bus with barrier.

[Data visual: Operator Assaults: 2018 - 85 cases; 2019 - 106 cases; 2020 - 80 cases. Source: Metro Safety, Security and Law Enforcement Dept, February 2021]

- **We're prioritizing employee wellness:** In 2016, Kaiser Permanente reported alarming health statistics for Sheet Metal, Air, Rail and Transportation (SMART) employees at Metro:
 - 11% of SMART workers had high blood pressure compared to the national average of 8%
 - 61% of SMART workers had a body mass index in the obese range compared to the national average of 38%

In response to these and other health metrics, in 2018, the SMART-MTA-TCU Wellness Program began to focus its efforts to respond to these alarming health metrics. With multiple healthcare providers involved, the Wellness Program seeks to boost employee health and morale through mental, physical, and financial health initiatives throughout the year. An annual wellness plan is created every year. In 2021, the Wellness Program will emphasize lowering blood pressure and providing mental health support, in addition to ongoing educational programming on healthy diets, nutrition, and physical exercise. Sample online-based initiatives in 2021 include the Metro Fit Club Weight Loss Challenge, virtual 5k Run/Walk, and virtual Health Fairs. Metro also offers the Employee Assistance Program which provides resources to employees experiencing personal problems that might affect their work performance. For example, requests for financial assistance rose from 3% in Spring 2020 to 12% in Summer 2020, likely attributable to the financial impacts of COVID-19 on households.

HOW WILL METRO BUILD AND NURTURE A DIVERSE, INSPIRED, AND HIGH-PERFORMING WORKFORCE? [Initiative 5.7]

- **We're listening and following up with our 11,000-strong team:** All Metro employees were invited to complete surveys in 2017 and 2019 to provide feedback that can help improve their workplace and work experience. The surveys helped management understand how employees feel about the organization, what

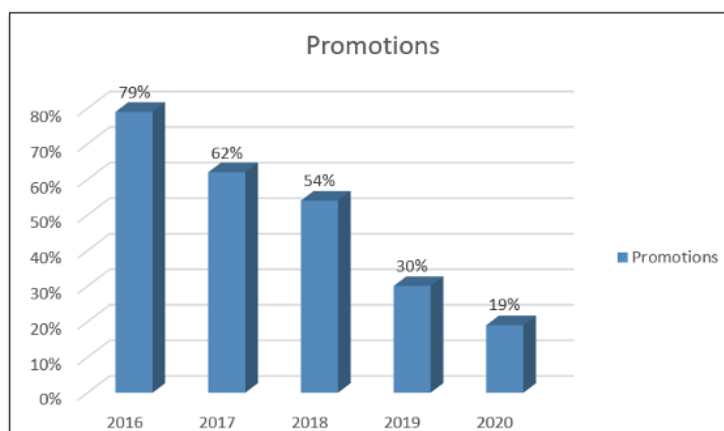
strengths can build, and where there are opportunities to improve. The findings have informed specific areas for improvement, from work performance to safety, trust, diversity and inclusion, communications, training opportunities. In light of the impacts that COVID-19 has had on Metro staff, new rounds of employee surveys will be necessary to gauge what work policies work well, what needs improvement, and what issues deserve attention moving forward. Preparation is underway for a 2021 wellness survey to evaluate potential shifts in employee attitudes and perceptions since the onset of the COVID-19 pandemic; the survey feedback will help Metro, its labor partners, and healthcare providers identify and tailor services to areas where employees may need additional support.

[Sidebar: In response to the 2017 and 2019 Employee Surveys, Metro’s Office of Civil Rights and Inclusion established a Diversity & Inclusion unit in February 2020. This unit launched the Courageous Conversations online series in March 2020 as a temporary measure to provide employees with implicit bias training. Beginning July 2021, an online Unconscious Bias course will be made mandatory for all employees. Metro is developing a Diversity & Inclusion Council to begin convening in FY22. The Council will include a representative group of full-time contract and non-contract employees to recommend, implement, and promote strategies to advance diversity and inclusion with the agency.]

- **We’re building leadership capacity within the organization:** Metro offers numerous leadership training opportunities to employees, such as the Leadership Academy, EnoMAX, and the Women and Girls Governing Council. Graduates of these programs are called upon to play key roles, such as the COVID-19 Recovery Task Force and Fareless System Initiative. With such a large workforce, supervisory training is also important. In early 2021, a new supervisor training program was introduced agency-wide. Training the next generation of leaders cannot be taken for granted, especially for an agency with an aging workforce and 50% of employees eligible for retirement by 2024.

Metro’s five Employee Resource Groups provide pathways for staff to advance Metro’s diversity and inclusion goals. For example, the African-American Employee Association, the Association for the Advancement of Latinos at Metro, the Filipino American Employee Association, Metro Emerging Professionals Association, and OUT@Metro (LGBTQIA+) worked collaboratively to develop a Statement of Unity in response to the violence occurring towards people of color and other marginalized groups in the recent past.

Overall, 89 out of 184 participants (48%) have received a promotion since joining the Metro Leadership Academy.

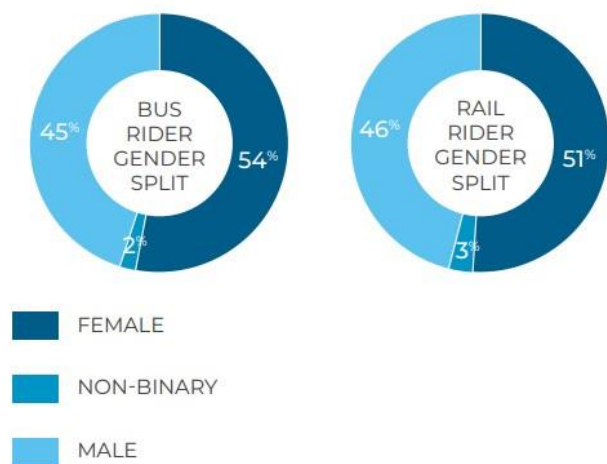


[Sidebar: Metro provides a menu of professional development opportunities to all employees: Leadership Academy, ENO Multi-Agency Exchange, Office of Extraordinary Innovation Fellowship, MAX Program, Women and Girls Governing Council, ECSD's Envision & GPro Certification. Metro provides a generous tuition-reimbursement program for employees to pursue higher education and advanced degrees in relevant fields.].

- **We're embracing a gender balanced workforce:** Metro's Women and Girls Governing Council was established in 2017 to analyze how Metro's programs, services and policies impact the lives of women and girls in LA County. This volunteer council is a diverse group of 60 Metro employees representing every department—union and non-union, entry level to executive—and serve to provide recommendations to the CEO on how to help advance and empower women and girls. The Council applies a gender lens in three focus areas: Metro as an employer, Metro as a service provider and Metro as a catalyst for economic development. The goals of the Council are:
- To have a gender balanced workforce;
 - To accelerate change because progress for women is progress for everyone; and
 - To not seek just one solution, but a comprehensive strategy to address the complex and inter-related causes of gender inequity, mobility and economic challenges.

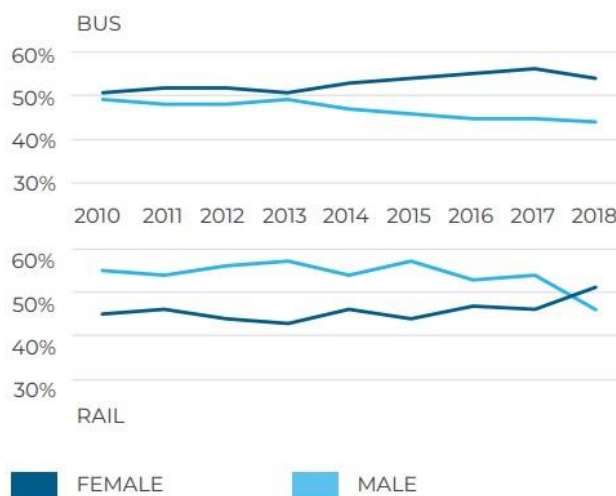
[Side bar: One of the major deliverables of the Women and Girls Governing Council was the groundbreaking 2019 study, "Understanding How Women Travel".]

Gender Split of Metro Bus and Rail Riders



Source: Metro On-Board Survey (Spring 2018)

Gender Split of Riders Over Time



Source: Metro On-Board Survey (2010-2018)

[One photo from the WGGC Metro Art Michele Asselin exhibition, Forward Motion, women working in transportation at Metro.]

- **We're making it easier to apply for a job at Metro:** A new user-friendly job application system will be introduced in 2021 to allow for better communication between Metro and prospective employees. To mitigate implicit bias, blind screening was introduced in 2020 to ensure job candidates are evaluated based on their knowledge, skills, and abilities (and not on personally identifiable information that may contribute to bias). Interview panelists are also required to undergo implicit bias training.

- **We're monitoring the hiring process to ensure equity:** When a department seeks to recruit for a position, the hiring manager is provided real-time data about their department's workforce demographics in comparison to the outside labor market, diversity goals, and targeted outreach requirements to help ensure a diverse applicant pool. All interview panels are diverse in race/ethnicity and gender and have at least three panel members to weigh in on the best candidate. Relevant employment material and data from the recruitment process are reviewed to ensure the process is free from discrimination and bias. From recruitment to onboarding, Metro strives to make sure the process is fair, equitable, and in alignment with Metro's diversity goals.

WHAT CHALLENGES AND OPPORTUNITIES SHOULD METRO CONSIDER?

- A. Establish a Data and Planning Analytics Hub:** Evidence-based decisions begins with having access to comprehensive and current data. Otherwise, decisions about policies, programs, and investments can suffer. Each department in Metro is currently responsible for their data and upkeep. Oftentimes, different departments have similar data and analytics needs, but rather than coordinating, efforts are duplicated, thereby creating inefficiencies. A centralized data and planning analytics hub within Metro can:

- standardize and coordinate basic data collection and planning analytics;
- produce a comprehensive performance baseline report and dashboard;
- provide barrier-free access to non-confidential data for agency partners and the public; and,
- collaborate with SCAG on its Regional Data Platform initiative⁹.

Assembling an efficient and service-oriented Data and Planning Analytics Hub within Metro may mean refocusing existing staff roles and expanding staff resources.

- B. Prepare a Medium-Term Financial Roadmap:** In addition to Metro's annual budget, which sets out the funded priorities in the immediate future, Metro produces a medium-term financial roadmap of the planned delivery of projects, programs, and services over the next decade in the Short Range Transportation Plan. This plan is one additional tool to help Metro achieve and maintain financial stability. To aid decision-makers more broadly, the medium-term financial roadmap should be tabled for discussion with the Board of Directors on a yearly basis so that there is a clear-eyed look into forecasted revenues and costs, and the implications for Vision 2028 goals.
- C. Review Organizational Alignment with Vision 2028:** Metro's ambitious work program is powered by the availability and deployment of staff and financial resources. With the transition in leadership at Metro, it may be an appropriate time strategically review the organization for its internal alignment to implementing Vision 2028. Some considerations are:
- Identifying organizational values to shape and communicate an organizational culture that will advance Vision 2028 implementation
 - Reviewing Metro's commitments in relation to resource constraints
 - Reviewing the organizational structure and internal processes with a view to improving strategic coordination, performance management, and continuous improvement
 - Integrating equity and climate action objectives into policy and investment decisions
 - Embracing the role of transportation to not only serve demand, but to shape demand in communities across the County through active engagement on regional land use and growth topics.

⁹ <https://storymaps.arcgis.com/stories/42984065691d4006852e4b02e5475452>

- D. Explore Best Practices to Assess Full Life-Cycle Costs and Maximize Benefits:** Metro's capital program has numerous rail and highway projects on deck for construction over the next three decades. These projects span many years and costs hundreds of millions, if not billions, of dollars. Ensuring that the benefits of these projects are maximized and maintained throughout their lifecycles, from early alternatives analysis and all the way through to construction and operation, may warrant exploring best practices from peer transport agencies to refine Metro's current approach to planning, program management, operations, and asset management.
- E. Retain Institutional Knowledge and Replenish Talent:** Nearly 50% of Metro's workforce will be eligible for retirement by 2024. An aging workforce, the new Metro employee buy-out program, and the current pandemic are increasing the rate of staff turnover and affecting recruitment. In particular, Metro's Voluntary Separation Incentives Program is increasingly seen as an opportunity to save on operating costs and to redirect those funds to other operating costs. Unless succession planning efforts are accelerated and expanded, the continual loss of expertise and institutional knowledge will seriously impact Metro's ability to deliver on its commitments.

Summary of Strategic Opportunities

This section summarizes the strategic opportunities identified within each goal chapter. Further dialogue will be required in most instances before action can be taken. The future update to Vision 2028 is an appropriate place to deliberate these possibilities.

GOAL 1: Provide high-quality mobility options that enable people to spend less time traveling.
<ul style="list-style-type: none"> A. Plan and Deliver Mobility as a System of Interlocking Parts B. Deepen Partnerships with Municipalities to Deliver World Class Transportation C. Address the State of Good Repair Backlog D. Develop a Comprehensive Pricing Framework
GOAL 2: Deliver outstanding trip experiences for all users of the transportation system.
<ul style="list-style-type: none"> A. Identify Sustainable Funding for Customer Experience, Transit Operations, Safety, and State of Good Repair B. Develop a Community-Based Approach to System Security and Law Enforcement
GOAL 3: Enhance communities and lives through mobility and access to opportunity.
<ul style="list-style-type: none"> A. Shape a Transit-Oriented Los Angeles County
GOAL 4: Transform Los Angeles County through regional collaboration and national leadership.
<ul style="list-style-type: none"> A. Take Regional Climate Action B. Match Actions to Policy C. Prepare a Medium-Term Legislative Strategy
GOAL 5: Provide responsive, accountable, and trustworthy governance within the Metro organization.
<ul style="list-style-type: none"> A. Establish a Data and Planning Analytics Hub B. Prepare a Medium-Term Financial Roadmap C. Review Organizational Alignment with Vision 2028 D. Explore Best Practices to Assess Full Life-Cycle Costs and Maximize Benefits E. Retain Institutional Knowledge and Replenish Talent

Status of Actions (as of April 2021)

Vision 2028 outlines 75 specific actions. The actions are intended to provide detailed guidance on the type and level of effort required to achieve the vision of a world class transportation system in Los Angeles County. And, because these original actions do not represent the full breadth of Metro's work program, additional actions are included below to show the level of effort that is underway or completed since 2018.

The status of these actions are shown below.

- **Completed (C):** substantial completion
- **In Progress (I):** underway or is an ongoing effort for reasons stated
- **On Hold (O):** minimal progress for reasons stated
- **Not Started (N):** no progress for reasons stated.

Action #	ACTION	C	I	O	N	Related Goals	Notes
Visionary Outcomes							
1	Establish baseline mode share for all trips			X			Metro will explore different data sources to prepare a baseline for mode share in Los Angeles County: <ul style="list-style-type: none"> • Procurement for location-based services data pilot is going to the Metro Board for approval in May 2021 • 2020 US Census commuting data will be released in 2022 • SCAG household travel survey will be initiated in 2022
2	Establish mobility standards, benchmark current condition, and identify gaps: <ul style="list-style-type: none"> • Ensuring that all County residents have access to high-quality mobility options within a 10-minute walk or roll from home; • Reducing maximum wait times for any trip to 15 minutes during any time of day; • Improving average travel speeds on the County's bus network by 30%; and • Providing reliable and convenient options for users to bypass congestion. 		X				Long Range Transportation Plan (2020) contains a comprehensive list of performance measures depicting 2017 baseline performance and forecasted performance for 2047.
Goal 1 – Provide high-quality mobility options that enable people to spend less time traveling							
Initiative 1.1A Target infrastructure and service investments towards those with the greatest mobility needs							
3	Implement equity framework and adopt performance metrics; incorporate into practices at Metro		X			2, 3, 5	Appointed first Equity and Race Executive Officer, developed Metro Budget Equity and Assessment Tool (MBEAT) for use during budgetary decisions, adopted Equity Focus

Action #	ACTION	C	I	O	N	Related Goals	Notes
							Communities definitions, developing Metro Equity Tool. Equity performance metrics are being identified in collaboration with Planning, Office of Management & Budget, and equity liaisons.
Initiative 1.1B Expand the transportation system as responsibly and quickly as possible							
4	Long Range Transportation Plan schedule for Measure R and M	X				2, 3	Adopted update to the LRTP, the agency's funding plan from 2017 to 2047, inclusive of schedule for Measure R and M projects
5	Advocate for accelerated resources, particularly from the state and federal government, to deliver the 28x2028 projects		X			3, 4, 5	Ongoing efforts underway to obtain grants for 28x2028 projects
Initiative 1.2A Invest in a world-class bus system that is reliable, convenient, and attractive to more users for more trips.							
6	Allocate resources in 10-year Strategic Budget Plan for World Class Bus* implementation		X			2, 3, 4	<p>Now referred to as the Better Bus Program, which aims to help advance NextGen and address other aspects of the bus experience, including improving speed, ease, safety and comfort.</p> <p>The medium-term resource requirements to implement the Better Bus program and NextGen Bus speed and reliability improvements have been identified, and a financial plan is under development.</p> <p>Expanding sustainable funding for transit operations is a strategic opportunity (see Goal 2 chapter).</p> <p>Preparing a 10-year (or medium-term) financial plan is also a strategic opportunity (see Goal 5 chapter).</p>
7	Improve Metro Local travel speeds to 15 mph		X				<p>Given the adoption of the NextGen Bus Plan in 2020, Metro Rapid services have been eliminated.</p> <p>Metro is focusing on reducing overall travel time in the transit network by <i>optimizing all components</i> of the trip, including accessing the bus stop, waiting, and riding. We plan to make the network more competitive and attractive by investing in fast, frequent and reliable service, especially during the midday, evenings and weekends when the greatest opportunity to grow ridership exists.</p>
8	Improve Metro Rapid speeds to 18 mph						No longer applicable, see Action No. 7 for more information

Action #	ACTION	C	I	O	N	Related Goals	Notes
9	Convert strategic Metro Rapid corridors to bus rapid transit corridors						No longer applicable, see Action No. 7 for more information
10	Conduct NextGen Bus Study	X				2, 3	NextGen Study was complete and adopted in 2020. Implementation underway. Network restructuring is underway and will be complete by September of 2021
11	Conduct Metro Bus Rapid Transit (BRT) Vision and Principles Study, including development of Bus Rapid Transit design guidelines, performance metrics, and prioritized list of corridors	X				3	BRT Vision and Principles Design Guideline Manual and top 5 recommended BRT corridors adopted in 2021
12	Identify congestion hot spots for critical/core bus corridors		X			2, 3, 4	Bus Speed and Engineering Working Group is identifying arterial-based improvements on bus corridors.
13	Implement transit priority measures (e.g., signal priority, queue jumps, exclusive lanes, and congestion hot spot mitigations) for bus corridors		X			2, 3, 4	Bus Speed and Engineering Working Group is identifying arterial-based improvements on bus corridors
14	Align transit network with future land use plans to determine best mitigation approaches to improve bus operations			X		3, 4	The Transit-Oriented Communities Implementation Plan, adopted in 2020, will create opportunities to align local land use plans and Metro's transit network. Regionally, the integration of land use and transportation is a strategic opportunity (see Goal 3 chapter).

Initiative 1.2B Partner with Metrolink to increase the capacity of the regional transportation system

15	Work with the Southern California Regional Rail Authority (SCRRA) to provide more frequent and reliable Metrolink services, improve customer satisfaction, and support better transit connections throughout the network		X			2, 3, 4	Metro is a partner in SCRRA's Southern California Optimized Rail Expansion (SCORE) program, a \$10 billion capital program to upgrade Metrolink's passenger rail service through 75 different projects across six counties
16	Build a state-of-the-art, condition-based asset management practice for maintaining all mission-critical assets to the highest performance standards and upgrading to current technologies		X			2, 5	Phase 1 procurement and installation of software solution is complete. Phase 2 implementation will be completed by 2023/24.
17	Define guidelines for performance outcomes of full transportation network	X				2, 5	L RTP contains forecasted performance outcomes to 2047.
18	Update funding guidelines for local and municipal transit providers to align with achieving goals of Metro Vision 2028 Plan				X	2, 3, 4, 5	Provisions in Measure R and Measure M make it impractical to update funding guidelines affecting municipal transit providers.
19	Incentivize Metro funding program recipients to contribute to achieving the mobility goals of the		X			2, 3, 4, 5	Metro will consider adopting proposed amendments to the Measure R Highway Program eligibility criteria and Measure M

Action #	ACTION	C	I	O	N	Related Goals	Notes
	transportation network per the Metro Vision 2028 Plan						<p>Guidelines, Section X Multi-Year Programs (Highway Subfunds) in June 2021. The main revisions proposed are to expand eligibility to multimodal projects that support complete streets, and projects that ease congestion by reducing VMT.</p> <p>Metro is partnering with local municipalities to prepare first last mile plans to incentivize investments to improve connectivity. Metro administers the Metro Active Transportation funding program to provide further incentives and support to local municipalities.</p> <p>The Better Bus program is also developing incentives to spur cities to add bus stop shelters and other amenities.</p> <p>More broadly, municipalities have direct control over supportive policies, such as land use and affordable housing, parking supply requirements, transit priority measures, complete streets, and design review, that are material to the effectiveness of Metro's services. Deepening partnership with municipalities is a strategic opportunity (see Goal 1 chapter).</p>
20	Update Metro design standards to improve connectivity between transit lines and connecting modes for all transit facilities		X			2	Metro updates design guidelines and standards on an ongoing basis, such as the Transfers Design Guidelines (2018)
21	Update plans to create clear, comfortable, and user-friendly transfers at all major connection points		X			2	Metro's Customer Experience Plan (2020) and BRT Vision and Principles Design Guideline Manual (2021) prioritize user-friendly experience improvements at major transit connection points.
22	Collaborate with municipal partners to establish policies to prohibit curb congestion in bus corridors		X			2, 3, 4	<p>The Bus Speed and Engineering Working Group is identifying arterial-based improvements on bus corridors.</p> <p>Proposed Assembly Bill 917 would authorize any public transit operator to enforce parking violations in specified transit-only traffic lanes through the use of video imaging and to install automated forward facing parking control devices on public transit vehicles. Metro advocated for state-wide enabling legislation.</p>
23	Use improvements in technology, equipment, and infrastructure to		X			2, 3, 5	Procured and installed new Enterprise Safety Management System software. Full system

Action #	ACTION	C	I	O	N	Related Goals	Notes
	improve safety on Metro transit network						<p>implementation will be completed by 2023/24.</p> <p>Reviewing SmartDrive video event trends to identify safety issues month over month and year over year to work toward improved safety trend.</p> <p>Installing SmartDrive on Rail fleet so safety improvements can be measured fleetwide (bus and rail).</p>
24	Update funding program criteria to prioritize projects that improve safety and reduce conflicts between different users of the roadway while improving system integration and maximizing person throughput		X			2, 3, 4, 5	<p>Metro Active Transportation Program Cycle 1 was approved by the Board in 2021 totalling \$63 million to fund first/last mile projects. Safe connections for walking and cycling is a priority. Proposed amendments to Measure R and Measure M highway funds will include expanding eligibility for complete streets projects.</p> <p>In January 2021, the Metro Board approved a resolution directing staff to develop a Street Safety Policy, encompassing strategies to reduce injuries and deaths, the creation of a countywide data collection program to document and analyze transportation-related serious injuries and fatalities, and an assessment of internal risk and liability for the safety of all Metro mobility services</p>
25	Develop and execute a legislative strategy to improve passenger and transit vehicle safety through policy and regulatory actions at all levels of government		X			4, 5	Ongoing. One example is Metro's advocacy for state-wide enabling legislation to authorize public transit operators to enforce parking violations in transit-only lanes through the use of video imaging and forward facing parking control devices on transit vehicles. Assembly Member Bloom has introduced AB917.
26	Conduct comprehensive transportation system pricing study to determine options for meeting four goals of equity, ridership, revenue, and security			X		2, 3	The Comprehensive Pricing Study was initiated in 2020; currently on hold pending outcomes of Fareless System Initiative and directions from the Board.
27	Implement transportation system pricing policy based on study				X	2, 3	Subject to the restart and completion of the Comprehensive Pricing Study.
28	Implementation of ExpressLanes Tier 1 network		X			2, 3	Most Tier 1 segments are in the environmental review stage.
29	Test and implement pricing strategies to reduce traffic congestion. Pilot study to identify best locations for proof of concept		X			2, 3, 4	Traffic Reduction Study is underway and will recommend a proposed pilot program by 2022.

[illegible]

Action #	ACTION	C	I	O	N	Related Goals	Notes
Initiative 2.1 Metro is committed to improving security							
33	Update performance measures related to security, benchmarked against best-in-class organizations		X			1, 2, 4	Transit safety and security performance measures have been updated. Metro Board receives monthly updates on these performance measures (compared year-on-year using monthly, semi-annual, and annual periods)
34	Develop and implement employee training program, including outreach to community-based organizations; provide implicit bias training for fare inspectors and officers.		X			2, 3, 5	Employee training program, including implicit bias training, for all new fare inspectors and security officers has been established.
35	Explore and implement prevention tactics; promote prevention as a first measure to reduce frequency and severity of crimes.		X			2, 3, 4	Context-appropriate, unarmed deployments include Transit Ambassador Program and Elevator Attendant Program.
36	Install state-of-the-art video surveillance and access control systems		X			2, 3	Metro received a \$5M federal grant to implement a new video management system.
37	Measure change in perception of safety		X			1, 2, 3	Perceptions of safety is asked in the new comprehensive, annual Customer Experience surveys. The new Public Safety Advisory Committee will explore new ways of addressing public safety, and will help guide a public safety survey.
38	Develop and implement community policing plan		X			2, 3, 4	The Public Safety Advisory Committee will shape the development of a community policing plan, with an initial draft covering LAPD, LA County Sheriff, and Long Beach Police.
39	Develop and deploy program to prevent sexual harassment on system		X			2, 3	Sexual harassment reporting protocol was updated in 2020. "How Women Travel" provided insights to inform decisions. Transit Watch app
Initiative 2.2 Metro is committed to improving legibility, ease of use, and trip information on the transit system.							
40	Transit Access Pass (TAP) card integration across all services	X				1, 2, 4	TAP has expanded its network to 26 County transit systems. TAP Force network, established in 2019, enables connections by third party service providers.
41	Develop plan and implementation process/schedule to align transit information across system		X			1, 2, 3, 4	Metro will issue an RFP for a Nextrip upgrade, critical for supplying accurate data to Transit app and other downstream systems.
42	New mobile app integrating trip information and fare payment for all mobility services in the County	X				1, 2, 4	Transit app, Metro's official app, for trip planning. TAP app integrates trip information and fare payment for 26 transit systems in LA County.

Action #	ACTION	C	I	O	N	Related Goals	Notes
43	Partner with other transit providers to share transit information across all digital signs and mobile platforms for convenient trip planning and transfers across region		X			1, 2, 4	Included in the 2020 Customer Experience Plan
44	Conversion of bus and rail fleets to cellular communications and data systems to improve accuracy of travel time, allow TAP card loading and wireless transfer of data and fares		X			1, 2	Wi-Fi has been installed on the bus fleet. The Rail project is subject to Board approval of FY22 budget request.
45	Establish open payment system for TAP				X	1, 2, 4	Pending the progress of the Fareless System Initiative Study, which could supercede the need for fare payment.

Initiative 2.3 Improve customer satisfaction at all customer touchpoints

46	Customer satisfaction survey		X			1, 2, 3	A new comprehensive Customer Experience Survey and research methods that obtains customer feedback on over 40 aspects of service is planned annually.
47	Dedicate staff resources to oversee customer experience and develop a comprehensive approach for improving customer satisfaction		X			1, 2, 5	Customer Experience Executive Officer (within the Office of the CEO) was hired in 2020 and delivered the Board-approved Customer Experience Plan, which includes additional hires to support it.
48	Continuous improvement program with measures related to customer satisfaction for all services, benchmarked against best-in-class organizations				X	1, 2, 5	Developing a continuous improvement program is a strategic opportunity (see Goal 5 chapter)
49	Wi-Fi as amenity to all customers		X			1, 2	Metro buses have free Wi-Fi access. Wi-Fi on Metro rail is subject to Board approval of FY22 budget request.

Additional Actions

	Systemwide Station Design Standards		X			1, 2, 5	
	Transfers Design Guidelines		X			1, 2, 5	
	Better Bus, including bus stop improvements		X			1, 2, 5	
	Accessible wayfinding		X			1, 2, 5	
	Interactive touch screens		X			1, 2, 5	
	Public Safety Advisory Committee		X			1, 2, 3, 4, 5	
	Supportive Transit Parking Program Master Plan		X			1, 2, 3	Metro is able to manage utilization at 20 Metro passenger facilities to ensure customer parking spaces are available throughout the day. The complementary Ridership Verification System ensures that only transit users are utilizing the parking spaces.
	Fareless System Initiative		X			1, 2, 3, 4	

Action #	ACTION	C	I	O	N	Related Goals	Notes
	Uplift the Human Spirit with Metro Art: Beyond Infrastructure		X			1, 2, 3, 5	
Goal 3 - Enhance communities and lives through mobility and access to opportunity							
Initiative 3.1 To lift up local communities, Metro will create jobs and career pathways in transportation.							
50	Implement Workforce Initiative Now-Los Angeles (WIN-LA) Program		X			4	Metro launched WIN-LA in 2017 to create pathways for working-age adults to go into construction, operations/maintenance, administration, and professional services jobs within the transportation industry from population groups that have faced historical barriers. Metro is now developing requirements for contractors to hire WIN-LA program participants.
51	Develop curriculum for Transportation School		X			4	Ground-breaking for the public boarding school took place in October 2020 on a Metro-owned site at the corner of Vermont and Manchester Avenues. The school is anticipated to open in August 2022. Development of the curriculum is underway.
52	Work with federal funding partners to support targeted and local hiring		X			4, 5	Ongoing legislative advocacy effort
INITIATIVE 3.2 METRO WILL LEVERAGE ITS TRANSIT INVESTMENTS TO CATALYZE TRANSIT-ORIENTED COMMUNITIES AND HELP STABILIZE NEIGHBORHOODS WHERE THESE INVESTMENTS ARE MADE.							
53	Develop strategic transit-oriented communities' recommendations for jurisdictions where transit corridors are located		X			4, 5	Metro Board adopted the Transit-Oriented Communities Policy in 2018 and TOC Implementation Plan in 2020. TOC Corridor Baseline Assessments will be undertaken for all Metro transit corridors. Metro will also administer the TOC Grant Writing and Technical Assistance Programs.
54	Incorporate transit-oriented communities' considerations into all new transit corridor plans		X			4, 5	All Metro transit corridor planning efforts include assessments of opportunities and constraints to transit-oriented development.
INITIATIVE 3.3 METRO IS COMMITTED TO GENUINE PUBLIC AND COMMUNITY ENGAGEMENT TO ACHIEVE BETTER MOBILITY OUTCOMES FOR THE PEOPLE OF LA COUNTY.							
55	Develop community engagement strategy in alignment with equity framework in Initiative 1.1		X			4, 5	Metro's Equity and Race Executive Officer is leading the preparation of the Community-Based Organization Partnering Strategy to ensure alignment with the Equity Platform. The strategy is expected to be advanced to the Metro Board in 2021.
INITIATIVE 3.4 METRO WILL PLAY A STRONG LEADERSHIP ROLE IN EFFORTS TO ADDRESS HOMELESSNESS IN LA COUNTY.							
56	Expand Homeless Outreach Program to increase the presence of C3 (city, county, and community) teams as the first point of contact with individuals in need		X			1, 2, 4, 5	Metro Board approved a two-year extension of the C3 team contract (July 1, 2021 to June 30, 2023) and approved funding for a four-month emergency shelter pilot program.

Action #	ACTION	C	I	O	N	Related Goals	Notes
							In April 2020, Metro launched Operation Shelter the Unsheltered, a collaborative effort between Metro Transit Security (Metro-contracted law enforcement partner), the LA County Department of Health Services, The Dream Center, and LA DOOR outreach teams to address heightened numbers of homeless persons at six Metro Rail stations. As of December 31, 2020, Metro and its partners have connected 655 individuals to housing accommodations.
GOAL 4 – TRANSFORM LA COUNTY THROUGH REGIONAL COLLABORATION AND NATIONAL LEADERSHIP							
INITIATIVE 4.1 METRO WILL WORK WITH PARTNERS TO BUILD TRUST AND MAKE DECISIONS THAT SUPPORT VISION 2028							
57	Align funding program requirements to Metro Vision 2028 Plan goals and initiatives		X			1, 2, 3, 5	Expanding eligibility for Complete Streets projects and prioritizing VMT reduction among proposed amendments to Measure R and Measure M to be brought to the Metro Board. Technical and grant-writing assistance for municipalities for Active Transportation Programs and Transit-Oriented Communities Co-investment in bus stops, as part of the Better Bus Initiative
INITIATIVE 4.2 METRO WILL HELP DRIVE MOBILITY AGENDAS, DISCUSSIONS, AND POLICIES AT THE STATE, REGIONAL, AND NATIONAL LEVELS.							
58	Develop annual and 5-year legislative strategy on mobility issues				X	1, 2, 3, 5	An annual legislative agenda is prepared every year, but not a 5-year legislative strategy. The latter is a strategic opportunity (see Goal 4 chapter).
ADDITIONAL ACTIONS							
	Metro Active Transport, Transit and First/Last Mile (MAT) Program, through Measure M		X			1, 2, 3	
	Goods Movement Strategic Plan Freight Working Group		X			1, 2, 3	
	Knowledge Exchange on Technology		X			1, 2, 3	
	NextGen Bus Speed and Reliability Working Group		X			1, 2, 3	
	RIITS data		X			1, 2, 3, 5	
	LRTP and its alignment with the SCAG Regional Transportation Plan		X			1, 2, 3, 5	
	Countywide Zero-Emission Trucks Collaborative		X			1, 2, 3, 5	
	Moving Beyond Sustainability Plan		X			1, 2, 3, 5	
	Phil Washington headed the American Public Transportation Association's		X			1, 2, 3, 5	

Action #	ACTION	C	I	O	N	Related Goals	Notes
	Mobility Recovery and Restoration Task Force						
	Phil Washington served as Team Lead reviewing the federal Department of Transportation, NTSB, Amtrak, and Maritime Commission		X			1, 2, 3, 5	
	Establishing an alternative to California Environmental Quality Act (CEQA)		X			1, 2, 3, 5	
GOAL 5 – PROVIDE RESPONSIVE, ACCOUNTABLE, AND TRUSTWORTHY GOVERNANCE WITHIN THE METRO ORGANIZATION							
INITIATIVE 5.1 METRO WILL LEVERAGE FUNDING AND STAFF RESOURCES TO ACCELERATE THE ACHIEVEMENT OF GOALS AND INITIATIVES PRIORITIZED IN THE V28 PLAN							
59	Align all of the Metro's business processes, resources, plans and tools with its strategic plan vision, goals, and initiatives		X			1, 2, 3, 4	A strategic opportunity. See Goal 5 chapter.
INITIATIVE 5.2 METRO WILL EXERCISE GOOD PUBLIC POLICY JUDGEMENT AND SOUND FISCAL STEWARDSHIP.							
60	Develop 10-year Strategic Budget Plan reflecting Metro Vision 2028 Plan goals and initiatives phased in over 10-year period				X	1, 2, 3, 4	A strategic opportunity. See Goal 5 chapter.
61	Use best practices to assess the full life-cycle costs of infrastructure and service investments; identify and share information about trade-offs				X	1, 2, 3, 4	While life-cycle costs are regularly analyzed in capital project studies, a review of best practices has not been initiated. This is a strategic opportunity (see Goal 5 chapter).
62	Regularly evaluate Metro's service offerings to ensure the lowest system impact for the highest gain in mobility		X			1, 2, 3, 4	The NextGen Bus Study is one example of evaluating transit service to improve cost-effectiveness.
INITIATIVE 5.3 METRO WILL DEVELOP A TRANSPARENT DATA MANAGEMENT POLICY CONTAINING POLICIES.							
63	Develop a data management policy containing policies on data access, protection of personally identifiable information and data generated under Metro contracts		X			1, 2, 3, 4	Metro is preparing a data management policy that will, among other features, provide a basic template for departments across the agency to use to structure and manage their respective datasets. A common data warehouse is being explored as a common repository for all data in the agency. This is a strategic opportunity (see Goal 5 chapter).
INITIATIVE 5.4 METRO WILL APPLY PRUDENT COMMERCIAL BUSINESS-PRACTICES TO CREATE A MORE EFFECTIVE AGENCY.							
64	Develop a program of rigorous performance management and continuous improvement across all functions of the organization; look at internal processes to remove unnecessary procedures and decision ladders.		X			1, 2, 3, 4	Potential improvements to the Comprehensive Agency-wide Performance Evaluation system is a strategic opportunity (see Goal 5 chapter).
65	Establish baseline for system performance		X			1, 2, 3, 4	Various dashboards have been created and new ones are being planned. Efforts will be required to coordinate and integrate these

Action #	ACTION	C	I	O	N	Related Goals	Notes
							dashboards (e.g. one comprehensive agencywide dashboard.)
66	Allocate staff and financial resources in annual and 10-year Strategic Budget Plan to lead and administer the performance management and continuous improvement program				X	1, 2, 3	A strategic opportunity. See Goal 5 chapter.
INITIATIVE 5.5 METRO WILL EXPAND OPPORTUNITIES FOR BUSINESSES AND EXTERNAL ORGANIZATIONS TO WORK WITH US.							
67	Survey the small business community to assess the impact of changes we make to our processes and procedures		X			3, 4	<p>Ongoing effort (including MetroConnect outreach events, Labor Wage and Retention Program Survey, surveys and working sessions with small business community).</p> <p>Diversity & Economic Opportunity Department conducted a small business survey in January 2021. Survey feedback was used to inform proposed new program enhancements to Metro's Medium Size Business Enterprise Program and small business programs to increase access to contracting opportunities for disadvantaged business enterprises, small business enterprises, and disabled veterans business enterprises. Ongoing survey and working sessions with the small business community will be undertaken.</p>
INITIATIVE 5.6 METRO WILL FOSTER AND MAINTAIN A STRONG SAFETY CULTURE.							
68	Conduct survey to gauge employee perceptions of safety, security and wellness		X			2	Metro Team Survey administration in 2017, in 2019 and in future years.
69	Develop benchmark and measures for employee wellness		X			2	SMART-MTA-TCU Wellness Program
70	Develop strategies and metrics for improving safety and security for employees		X			1, 2, 3, 4	Various efforts underway, such as the Law Enforcement Service Request for employees.
INITIATIVE 5.7 METRO WILL BUILD AND NURTURE A DIVERSE, INSPIRED AND HIGH-PERFORMING WORKFORCE.							
71	Develop and implement supervisor training curriculum to build leadership capacity from within the organization	X				1, 2, 3, 4	Supervisor training program launched in 2021.
72	Streamline and improve processes for recruitments and promotions to focus on hiring the best people	X				3	<p>New friendlier and streamlined online job application system</p> <p>Blind screening of applicants</p>
73	Update onboarding process and curriculum for new employees to incorporate understanding of Metro vision and philosophy	X				1, 2, 3, 4	New employee onboarding process includes a presentation on Vision 2028 from the Senior Leadership Team.
74	Administer Metro Team Survey to gauge employee empowerment and engagement		X			1, 2, 3, 4	Team Surveys were administered in 2017 and 2019. Metro will consider administering future

Action #	ACTION	C	I	O	N	Related Goals	Notes
							surveys to track changes in employee perceptions.
75	Develop and implement action plan based on Metro Team Survey results		X			1, 2, 3, 4	Detail findings from the 2019 survey have been shared with all managers having direct reports. Each department is responsible for developing and implementing appropriate action plans.
ADDITIONAL ACTIONS							
	\$3 billion in state and federal grants since March 2020, and is currently managing over \$9 billion in grant activities		X			1, 2, 3, 4	
	Section 5309 New Starts and Small Starts		X			1, 2, 3, 4	
	Lobbying effort for COVID relief		X			1, 2, 3, 4	
	Improve cost-efficiency of Metro Bike Share		X			1, 2, 3, 4	
	Unsolicited Proposals		X			1, 2, 3, 4	
	Public Private Partnerships		X			1, 2, 3, 4	
	Transportation Business Advisory Council		X			3, 4	
	Contractor Development and Bonding Assistance Program (CDBAP)		X			3, 4	
	Enhancements to Metro's Medium and Small Business Enterprise Programs		X			3, 4	
	Professional growth programs: Leadership Academy, EnoMAX, Women and Girls Governing Council		X			1, 2, 3, 4	
	Gender-Balanced Workforce		X			1, 2, 3, 4	

World Class Transportation

A century ago, Los Angeles boasted more than 1,100 miles of streetcar track – the largest streetcar network in the world. Around the same period, Southern California emerged as the first place in the world with mass ownership of motor vehicles. By 1930, there were two registered cars for every three persons in the county.¹⁰ A few short decades later, the streetcar network was gone, and the car solidified its place as the dominant mode of transport. What was seen at the time as world class transportation in Los Angeles County was quickly emulated the world over, and billions now live with the consequences of those decisions.

Fast forward a hundred years later, Metro is committed to prioritizing the movement of people over personal vehicles, and connecting and uplifting communities. Metro’s mission is world class transportation, defined by the three visions of removing barriers to prosperity, swift and easy mobility, and high quality and sustainable mobility options. To achieve world class transportation, Metro will need to implement global best practices.

This Progress Report highlights many initiatives that **are** world class – the NextGen Bus Plan redesign, the Traffic Reduction Study as a step towards congestion pricing, the Transit-Oriented Communities program, the Equity Platform and tools in development, capital projects that allow expanded service on existing routes, and so on.

Sidebar: “American communities could be as good as or better than any other place in the world when it comes to mobility options- we just have to make that choice.” - Pete Buttigieg, Secretary of Transportation, March 2021.¹¹

The figure below shows some other world class transportation outcomes from around the globe, with Los Angeles County data for comparison. Metro does not have to exactly mirror these global practices to be successful. But one of the hallmarks of a world class organization is to learn from peers. Metro’s path to world class transportation will be a product of ongoing improvement of existing services, imitation and adaptation of world class successes, and Los Angeles County’s own brand of innovation.¹²

¹⁰Scott L. Bottles. Los Angeles and the Automobile: the making of the modern city. Berkeley: University of California Press, 1991.

¹¹ Secretary Pete Buttigieg. Twitter. March 22, 2021.

¹² Didier M. van de Velde (2013) Learning from the Japanese railways: Experience in the Netherlands, Policy and Society, 32:2, 143-161, DOI: [10.1016/j.polso.2013.05.003](https://doi.org/10.1016/j.polso.2013.05.003)



[Information for world map]

Characteristic	Jurisdiction	Los Angeles County
1. Multi-modal metropolis	In Tokyo (pop 14 million), only 12 percent of trips (all purposes) are by private car. 47% are by rail or bus, 24% walking, 17% cycling. ^{13 14}	In Los Angeles County, 2.9% of trips (all purposes) are on transit, 12% walking, 1% cycling, and 84% by car. ¹⁵
2. Growing ridership by integrating regional land use and transportation planning	For four decades, urban development in Vancouver (pop 2.5 million) has been focused in regional urban centers served by a frequent transit network. ^{16 17} Vancouver was one of the few places in North America to see consistent transit ridership growth over the past 20 years. ^{18 19}	With a population one quarter the size of Los Angeles County, Vancouver's surpassed Metro's ridership levels in 2017 (407 million v. 397 million boardings). ²⁰
3. Comprehensive frequent transit network	Seattle (pop 4 million) aggressively expanded its frequent transit network of buses and light rail such that 70% of Seattle households today live within a 10-minute walk to 10-minute or better all-day transit service – a remarkable achievement from a coverage of 25% in 2015. ²¹	In LA County, 9% of residents live within walking distance to frequent transit. The NextGen Bus Plan will increase bus coverage to 22% of residents. ²²
4. Transit used by all social groups	In New York City (pop 8.4 million), residents of all races use transit at shares close to their overall share in the population and the median income of transit commuters is similar to that of all commuters. ²³	Metro's customer base is disproportionately Latino and African American, and the median household income of all customers is \$19,000, less than a third of the County average. ²⁴
5. Dignified bus stops	In London (pop 9 million), the public transit agency serves 19,000 bus stops and owns	Metro chooses bus stop locations but does not own or control bus shelters. Of the 13,802 bus stops that Metro serves, only

¹³ https://www2.deloitte.com/content/dam/insights/us/articles/4331_Deloitte-City-Mobility-Index/Tokyo_GlobalCityMobility_WEB.pdf

¹⁴ <https://web.archive.org/web/20140715001906/http://app.lta.gov.sg/ltacademy/doc/J11Nov-p60PassengerTransportModeShares.pdf>

¹⁵ <https://media.metro.net/2020/LRTP-TechDoc-Final.pdf>

¹⁶ <https://www.seattletimes.com/seattle-news/transportation/seattle-struggles-with-growth-and-transit-while-vancouver-b-c-figured-it-out-years-ago/>

¹⁷ <http://www.metrovancouver.org/metro2040>

¹⁸ <https://usa.streetsblog.org/2018/04/23/transit-ridership-slumping-not-in-canada/>

¹⁹ <https://www.thetransportpolitic.com/databook/transit-ridership-in-major-urbanized-areas/>

²⁰ <https://www.translink.ca/news/2017/december/translink%20hits%20ridership%20milestone%20of%20400%20million%20boardings>

²¹ [https://www.seattle.gov/transit/route-improvements/access-to-very-frequent-\(10-minute\)-transit-service](https://www.seattle.gov/transit/route-improvements/access-to-very-frequent-(10-minute)-transit-service)

²² <https://thesource.metro.net/2020/10/22/nextgen-plan-to-improve-metro-bus-system-is-approved-by-agencys-board-of-directors/>

²³ <https://www.governing.com/archive/gov-public-transportation-riders-demographic-divide-for-cities.html>

²⁴ http://media.metro.net/projects_studies/research/images/infographics/system_results_fall_2019.pdf

Characteristic	Jurisdiction	Los Angeles County
	12,000 bus shelters (out of a total of 13,000 bus shelters). ^{25 26}	24% are equipped with a shelter for customers to wait for the next bus. ^{27 28}
6. Bus rapid transit networks.	In Bogota (pop 7.2 million), the Bus Rapid Transit network carries over 600 million passengers annually and reduced riders' travel time by an average of 32 percent compared to the pre-BRT bus system. ^{29 30 31}	Metro's Orange and Silver line Bus Rapid Transit routes have a combined annual ridership of approximately 12 million. ³²
7. Frequent trains	In Paris (pop 7.2 million), trains arrive as frequently as once every 85 seconds - more than 40 per hour. ³³	Metro Rail frequency is 4-8 minutes in the peak, and 10-20 minutes in the off-peak.
8. Managed cost of transit expansion	In Seoul (9.8 million), 46 miles of new subway lines are being constructed this decade at a cost of approximately \$180 million/mile. ³⁴	In LA, 11 miles of subway and underground light rail are being constructed at \$949 million/mile. ³⁵
9. Designed for bicycles	In Copenhagen (pop 0.6 million), 62 percent of trips to work or school are taken by bicycle. ³⁶	In Los Angeles County, the cycling mode share is 1 percent. ³⁷
10. Safe streets	In Oslo (pop 0.6 million) there were zero pedestrian or cyclist deaths in 2019, and no children younger than 16 died in vehicle crashes in all of Norway. ³⁸	In Los Angeles County, car crashes are the fourth leading cause of premature death, and disproportionately injure and kill pedestrians and cyclists. In 2017, vehicle crashes in the county injured more than 91,000 people and killed 860 people. ³⁹

²⁵ <https://tfl.gov.uk/corporate/transparency/freedom-of-information/foi-request-detail?referenceId=FOI-1285-1920>

²⁶ <https://data.london.gov.uk/dataset/tfl-bus-stop-locations-and-routes#:~:text=Tfl's%20operates%20one%20of%20the,by%20some%208000%20buses%20daily.>

²⁷ <https://www.metro.net/news/facts-glance/>

²⁸ <https://la.curbed.com/2019/8/21/20802678/los-angeles-heat-metro-bus-stops-shade>

²⁹ https://brtda.org/location/latin_america/colombia/bogota

³⁰ https://www.esc-pau.fr/ppp/documents/featured_projects/colombia_bogota.pdf

³¹ <https://latinaer.springeropen.com/articles/10.1186/s40503-019-0079-z>

³² <https://isotp.metro.net/MetroRidership/YearOverYear.aspx>

³³ <https://www.railjournal.com/passenger/metros/paris-inaugurates-line-14-extension/>

³⁴ <https://transitcosts.com/city/seoul/>

³⁵ <https://transitcosts.com/city/los-angeles-2/>

³⁶ <https://www.wired.com/story/most-bike-friendly-cities-2019-copenhagenize-design-index/>

³⁷ <https://media.metro.net/2020/LRTP-TechDoc-Final.pdf>

³⁸ <https://www.theguardian.com/world/2020/mar/16/how-helsinki-and-oslo-cut-pedestrian-deaths-to-zero>

³⁹ <https://boardagendas.metro.net/board-report/2020-0928/>

Next Steps and Connecting with Metro

We will continue to track the progress of the actions and commitments in Vision 2028. Looking ahead, we will initiate the review of the strategic plan. This will be an opportunity for you to be involved and to help shape the way we live, work, and play in Los Angeles County. We will share with you more information as they emerge. Here are ways to stay in touch with Metro:

Let's chat

Join us quarterly for Metro Conversations and Community Conversations, our quarterly webinar series where Metro talks about our work and communities share their stories, respectively. Sign up for notifications and ways to connect on projects and programs that are of interest to you at [\[weblink\]](#)

We're listening

- >Facebook: @losangelesmetro
- >Instagram: metrolosangeles
- >Twitter: @metrolosangeles
- >YouTube: @losangelesmetro
- >LinkedIn: Los Angeles Metro

Connect with us

- Metro Customer Service
- Help & Contacts

Let's work together

- Metro Careers
- Student Opportunities
- Doing business with Metro
- Partnerships & Unsolicited Proposals
- Commercial Filming

More about us

- The Source: thesource.metro.net
- Metro Board & Committee Meetings
- Metro Advisory Committee
- Service Council Meetings

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Glossary and Bibliography

May 20, 2021

We see a better LA for all.

Metro Vision 2028 | 2021 Progress Report



Metro[®]

Los Angeles County
Metropolitan Transportation Authority



2021 Report on Progress

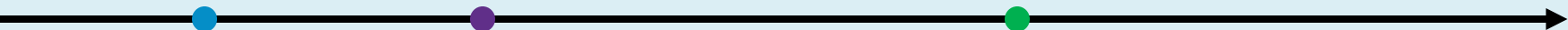
What's done and what remains

Metro's mission is to provide a **world-class transportation system** that enhances quality of life for all who live, work, and play within LA County.

2018 – Vision 2028 Adoption

2028 – Vision 2028 Horizon Year

2021 – Today



At a Glance

- Metro has **launched most of the actions** called for in Vision 2028.
- Vision 2028 focuses and coordinates our efforts to move **LA County towards a more multi-modal place to live, work, and play.**
- It will take **time and persistent effort** to reverse 100 years of car-oriented policies and investments.
- A **future update to the plan** can maintain flexibility, and allow for adjustments to goals and strategies.



Progress on Goal 1

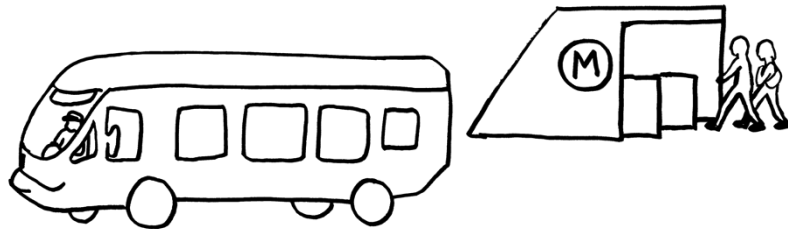
Provide High Quality Mobility Options

Progress & Accomplishments

- Measure M
- Long Range Transportation Plan update and capital projects' progress, bus rapid transit, active transportation, and highway projects
- New Office of Equity & Race, and equity tools
- ExpressLanes
- Elevated role of the bus (NextGen Bus Plan and Better Bus program)
- New Metro Micro service
- Fareless System Initiative

Challenges and Opportunities

- Plan and deliver mobility as a system of interlocking parts (draw upon success of NextGen and Better Bus and use similar approach with rail and arterials + highways)
- Deepen partnerships with municipal partners
- Unify all of Metro's pricing policies



Progress on Goal 2

Deliver Outstanding Trip Experiences

Progress and Accomplishments

- Established Customer Experience team in the Office of the CEO and adopted the agency's first Customer Experience Plan
- Introduced flexible ways to access transit information and to pay fares
- Convening the Public Safety Advisory Committee to help re-imagine Metro's approach to public safety

Challenges and Opportunities

- Sustainable funding to fully implement Customer Experience Plan, Better Bus, NextGen Bus, and State of Good Repair
- Establish a community-based approach to enhance security in an equitable way



Progress on Goal 3

Enhance Communities through Mobility and Access

Progress and Accomplishments

- Launched Workforce Initiative Now (WIN-LA)
- SEED School of Los Angeles County
- Launched Transit-Oriented Communities Implementation Plan and updating the Joint Development Policy
- Set partnerships for outreach teams to assist unhoused patrons on Metro system
- Established a Community-Based Organization Partnering Strategy

Challenges and Opportunities

- Take a leadership role in the integration of regional land use and transportation



Progress on Goal 4

Regional Collaboration and National Leadership

Progress and Accomplishments

- Won funding and improved policy through legislative program. \$9B in funding
- Transition to zero-emissions bus fleet
- Planned for recovery with Metro Recovery Task Force and through APTA Mobility Recovery and Restoration Task Force
- National leadership in presidential transition
- Accelerated bus lanes (e.g. Bus Speed Working Group)
- Convened stakeholders (e.g. Freight Working Group)

Challenges and Opportunities

- Build from sustainability plans with bigger role in regional climate action
- Adopt medium-term legislative strategy
- Match actions to policy (e.g. highways, land use, etc.)



Progress on Goal 5

Responsible, Accountable, and Trustworthy Governance

Progress and Accomplishments

- Strengthened career pathways and employee voice at Metro (Leadership Academy, EnoMAX, Metro Employee Surveys)
- Created opportunities for small and medium-size business enterprises
- Harnessed private sector innovation via Unsolicited Proposals, Public Private Partnerships



Challenges and Opportunities

- Establish data and analytics hub
- Short Range Transportation Plan update and medium-term financial roadmap
- Better align budget, organizational structure, and internal processes with Vision 2028
- Manage project costs and benefits holistically
- Retain institutional knowledge and replenish talent

Looking Ahead

- The Progress Report can encourage continued implementation refresh staff and public awareness of Vision 2028
- Vision 2028 provides flexibility for new initiatives and adjustments to achieve Metro's mission.
- Future update to Vision 2028.





Board Report

File #: 2021-0228, File Type: Project

Agenda Number: 41.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: MICROTRANSIT OPERATIONS FARE STRUCTURE AND SERVICE ZONES

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

CONSIDER:

- A. APPROVING the proposed MicroTransit Fare Structure with the introductory rate of \$1 for the remainder of calendar year 2021 and adopt the \$2.50 full fare effective January 1, 2022 for zones 1-8. Additional zones will be set to full fare once the first six months of Revenue Service Operations has concluded.
- B. APPROVING the service maps for MicroTransit Zones (6-8)

ISSUE

In October 2020, the Board of Directors approved an introductory fare of \$1 for the first six months of Revenue Service Operations for all MicroTransit (Micro) zones. June 13, 2021 will mark the sixth month of operation for our first two Micro zones (Watts/Willowbrook and Inglewood/LAX).

BACKGROUND

By design, MicroTransit is a flexible transit service built in alignment and synchronization with our NextGen Bus Plan. The goals of the service are to retain and grow ridership, to improve customer experience and to invest in workforce training and skill-building.

To date, Metro operates MicroTransit in 5 of 9 zones. Metro staff is on track to stand up an additional 4 zones later this year. The zone launch schedule for the three-year pilot is outlined below.

December 2020

- Watts/Willowbrook
- LAX/Inglewood

January 2021

- Compton/Artesia
- El Monte
- North Hollywood/Burbank

June 2021

- Highland Park/Eagle Rock/Glendale
- Altadena/Pasadena/Sierra Madre

August 2021

- Northwest San Fernando Valley

September 2021

- UCLA/Westwood/Century City

The agency's on-demand service has been planned to address systemic ridership losses by investing and prioritizing customer experience elements such as public safety, cleanliness, and responding directly to the needs of how women and girls travel on our system.

DISCUSSION

In 2020, MicroTransit Operations assembled an internal working group to develop a recommendation on the MicroTransit Fare Structure. The working group aimed to identify a fare structure that was consistent with Metro's family of services and similar to regional operators such as our paratransit provider Access Services. MicroTransit trips are reported as National Transit Database 5307 demand-responsive.

Participants represented the following departments and business units:

- Office of Civil Rights
- Office of Marketing and Commute Services
- Office of Equity and Race
- Office of Management and Budget
- Transit Access Pass (TAP)
- System Security and Law Enforcement
- Women and Girls Governing Council

As such, Metro staff recommended the full price to be set at \$2.50 per trip, aligned with the fare structure of the Silver Line. As a new on-demand service, MicroTransit is similarly priced to Access Services rates which are \$2.75 per trip for trips up to 19.9 miles and \$3.50 for trips more than 20 miles. In light of the pandemic, the working group recommended an initial introductory rate of \$1

per trip which was approved by the Board in October 2020 (Attachment A).

As part of current Board action, Metro staff seek an extension of the current introductory rate of \$1 through December 2021 and a roll out of the full fare of \$2.50 in January 2022. A transfer to Metro's fixed-route network (bus and/or rail) will be honored within the full fare of the trip, unless otherwise directed.

To ensure that community members are served in areas that have seen reductions in bus service under NextGen, passengers in Equity Focused Communities in Metro Micro zones will continue to be charged the \$1 rate through December 31, 2022.

Service Maps

Operations staff has closely monitored the impacts of COVID-19 pandemic and has adjusted the MicroTransit service model to support the needs of essential workers as well as new and emerging travel patterns resulting from the rapid growth in telecommuting.

Metro Micro has developed an avid following, with the average user having taken approximately 10 rides on the service since our December launch. As such, Metro staff seeks approval for the three service maps and hours of operations in Attachment B.

DETERMINATION OF SAFETY IMPACT

Customer and operator safety are core to maintaining the highest standards of security and the optimal service design for MicroTransit.

FINANCIAL IMPACT

Moving to the originally proposed fare of \$1.00 per trip will decrease revenue during the promotional rate period. In addition, subject to Board approval of the FY22 Budget, funding of \$39.5M is allocated under cost center 3595 - in support of operations and maintenance activities for the MicroTransit pilot program. Since this is a multi-year project, the cost center manager, Sr. Director, Special Projects will be accountable for budgeting the cost in future years.

Impact to Budget

The current source of funding for this action will come from Proposition C 25% funding. Using this funding source will maximize fund use given designated provisions and guidelines.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

This recommendation supports the following goals of the Metro Strategic Plan:

Goal 1: Provide high quality mobility options.

This contract modification increases the amount of service zones for the pilot project, thus providing access to MicroTransit for a larger part of the population. This service will increase the number of customers to the Metro system by offering more entry points to Metro's family of services.

Goal 3: Enhance communities and lives through mobility and access to opportunity.

The expansion of the MicroTransit pilot will supplement the agency's bus service and ensure our customers maintain mobility and access to major trip generators including employment centers, health services, parks and schools across Los Angeles County.

NEXT STEPS

Upon Board approval, Metro staff will prepare announcements of coming fare changes, maps for Micro zones, including execution of a comprehensive customer acquisition plan comprised of paid, digital and in-person activities in all Micro zones.

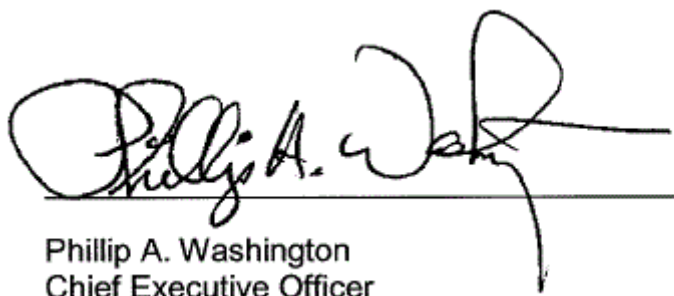
ATTACHMENTS

Attachment A - October 2020 Item # 23 (MicroTransit Fare Structure)

Attachment B - Microtransit Service Zones (Maps and Hours of Operations)

Prepared by: Rani Narula-Woods, Sr. Dir. Special Projects, (213) 922-7414

Reviewed by: James T. Gallagher, Chief Operations Officer, (213) 418-3108



Phillip A. Washington
Chief Executive Officer



Metro

Board Report

File #: 2020-0122, **File Type:** Plan

Agenda Number: 23.

**OPERATIONS, SAFETY & CUSTOMER EXPERIENCE COMMITTEE
OCTOBER 15, 2020**

SUBJECT: MICROTRANSIT OPERATIONS

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

AUTHORIZE the Chief Executive Officer to:

- A. APPROVE the proposed MicroTransit Fare Structure
- B. APPROVE adjustments to Service Zones per the NextGen Bus Plan

ISSUE

- A. Approve the proposed MicroTransit Fare Structure

Metro staff seeks approval of the proposed fare structure including introductory pricing for our new on-demand service, MicroTransit.

In May 2020, Operations assembled an internal working group to develop a recommendation on the MicroTransit Fare Structure.

Participants represented the following departments and business units:

- Office of Civil Rights
- Office of Marketing and Commute Services
- Office of Equity and Race
- Office of Management and Budget
- Transit Access Pass (TAP)
- System Security and Law Enforcement
- Women and Girls Governing Council
- MicroTransit Operations

The working group aimed to identify a fare structure that was consistent with Metro's current offerings and similar to regional operators such as our paratransit provider Access Services.

As such, Metro staff recommends the full price to be set at \$2.50 per trip, aligned with the fare

structure of the Silver Line. As a new on-demand service, MicroTransit is similarly priced to Access Services rates which are \$2.75 per trip for trips up to 19.9 miles and \$3.50 for trips more than 20 miles. MicroTransit trips have been deemed as eligible for National Transit Database 5307 demand-responsive reporting.

In light of the impacts of COVID-19 on our communities, Metro staff recommends a discount be applied for the first six months of Revenue Service Operations for each service zone launched in calendar years 2020 and 2021. As such, the introductory cost of each MicroTransit trip will be \$1.00 for all customers and will not include a transfer. MicroTransit passes will be sold at the introductory price in all MicroTransit service zones.

Operations staff will report back on a proposed timeline for the implementation of full fare 120 days following the launch of Revenue Service Operations.

B. Approve adjustments to Service Zones per the NextGen Bus Plan

MicroTransit Service Zones as approved at the February 2020 Board Meeting continue to be adjusted to support the buildout of Metro's NextGen Bus Plan.

Initial operations for MicroTransit will consist of up to a 12-hour service span, up to 7 days per week. Upon launch, hours of operation will be 7am-6pm Monday to Friday and 8am to 4pm on Saturday and Sunday in the Watts/Willowbrook service zone and 5am to 10am and 2pm to 7pm Monday to Friday in the LAX/Inglewood service zone.

MicroTransit is featured within Metro's NextGen Bus Plan recommendations and was presented as part of Metro's public hearings held in August 2020.

BACKGROUND

In light of the COVID-19 pandemic, which has resulted in new travel patterns across our fixed-route transit network, Metro staff is preparing for the roll out of MicroTransit Operations in alignment with Metro's NextGen Bus Plan.

By design, MicroTransit is a flexible transit service built in alignment and synchronization with our NextGen Bus Plan. The goals of the service are to retain and to grow ridership for Metro while improving the customer experience for current and future riders of the Metro network.

As approved in February 2020, the agency's on-demand service will allow Metro customers to order trips on the new service and to connect to our bus routes and train lines using internet browsers, mobile applications and our in-house call center. MicroTransit has been planned to address systemic ridership losses by investing and prioritizing customer experience elements such as public safety, cleanliness, and responding directly to the needs of how women and girls travel on our system. MicroTransit will make rideshare a viable mode for many communities which may not be able to afford the cost of privately operated services.

Metro staff is currently preparing to launch MicroTransit in the six unique service areas listed below:

- Watts/Willowbrook
- LAX/Inglewood

- Northwest San Fernando Valley
- Highland Park/Eagle Rock/Glendale
- Altadena/Pasadena/Sierra Madre
- UCLA/Westwood/Century City

Operations staff has closely monitored the COVID-19 pandemic and has adjusted the MicroTransit service model in order to safely operate while still serving the transportation needs of vulnerable populations and disadvantaged communities. Operations will fully comply with all safety protocols to ensure that the risk of COVID-19 is minimized for both employees and customers.

In an effort to adjust and respond to evolving State and County directives, Operations staff ran on-street testing in this new operating environment. Testing was run with virtual customers and Metro employees in partnership with technology partner RideCo and vehicle partner Access Services in the summer of 2020. Additional testing will be conducted throughout the fall.

The technology being utilized and developed in this pilot continues to be a highly effective means to adjust public transit to be responsive to an evolving operational environment, including essential trips.

Revenue Service Operations remain on track to launch in December 2020 in the Watts/Willowbrook and LAX/Inglewood service zones.

FINANCIAL IMPACT

The revenue and funding sources will be finalized during future budget processes.

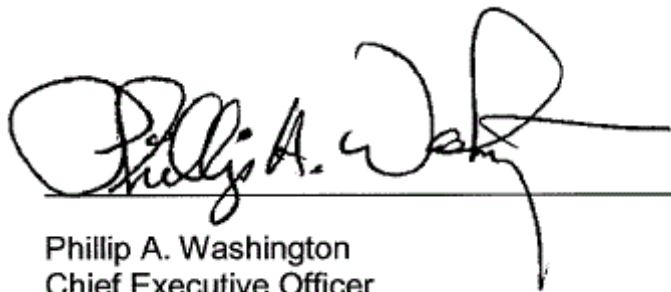
NEXT STEPS

MicroTransit Operations will continue to advance at pace with our NextGen Bus Plan. As a tool of NextGen, MicroTransit will be reviewed and service zones potentially reconfigured to best support the roll out of our systemwide changes to transit operations

Metro staff will continue to pursue funding at local, state and federal levels as well as sponsorship, private financing and related methods for revenue generation.

Prepared by: Rani Narula-Woods, Sr. Director of Special Projects, (213) 922-7414

Reviewed by: James T. Gallagher, Chief Operations Officer, (213) 418-3108



Phillip A. Washington
Chief Executive Officer

MicroTransit Pilot

Overview

By design, MicroTransit is a flexible transit service built in alignment and synchronization with our NextGen Bus Plan.

The goals of the service are to:

- retain ridership
- grow ridership
- improve the customer experience for current and future riders

Per approval by the Board in February 2020, Metro staff is currently preparing to launch

MicroTransit in the six unique service zones listed below:

- Watts/Willowbrook
- LAX/Inglewood
- Northwest San Fernando Valley
- Highland Park/Eagle Rock/Glendale
- Altadena/Pasadena/Sierra Madre
- UCLA/Westwood/Century City

Fare Working Group

In May 2020, Operations assembled an internal working group to develop a recommendation on the MicroTransit Fare Structure.

The working group aimed to identify a fare structure that was consistent with Metro's current offerings and similar to regional operators such as our paratransit provider Access Services.

Participants represented the following departments and business units:

- Office of Civil Rights
- Office of Marketing and Commute Services
- Office of Equity and Race
- Office of Management and Budget
- Transit Access Pass (TAP)
- System Security and Law Enforcement
- Women and Girls Governing Council
- MicroTransit Operations

MicroTransit Fare Structure

Description	Cost
Full Fare	\$2.50 per trip
Introductory Fare	\$1.00 per trip

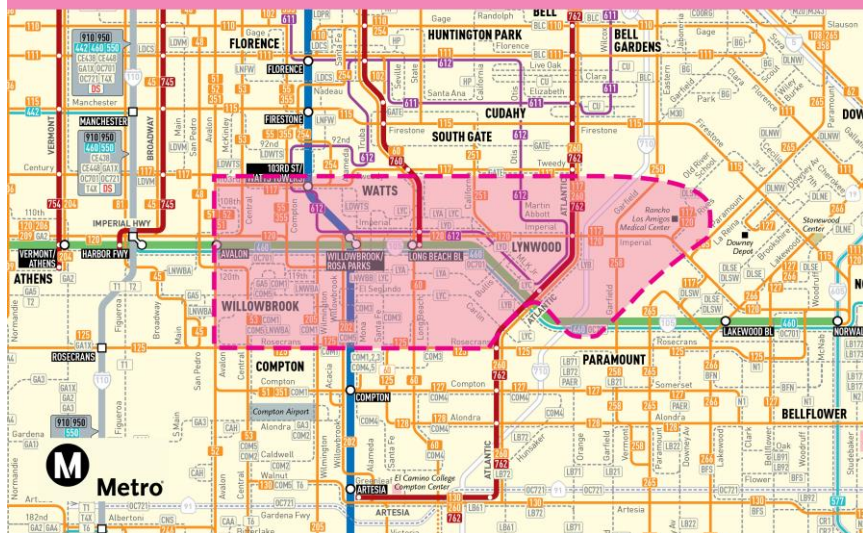
Service Zone	Introductory Fare
Watts/Willowbrook	December 2020-May 2021
LAX/Inglewood	December 2020-May 2021

*Introductory fare to apply for first six months of operation in each service area in calendar years 2020 and 2021.

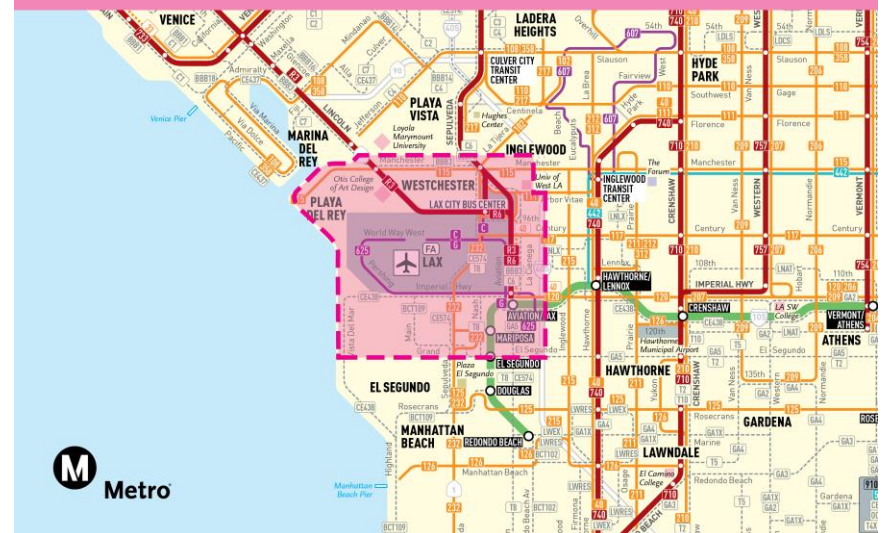
Service Zone Maps and Hours of Operation

Service Zone	Monday-Friday	Saturday and Sunday
Watts/Willowbrook	7am to 6pm	8am to 4pm
LAX/Inglewood	5am to 10am and 2pm to 7pm	

Proposed Watts/Willowbrook Metro MicroTransit Service Zone



Proposed LAX/Inglewood Metro MicroTransit Service Zone

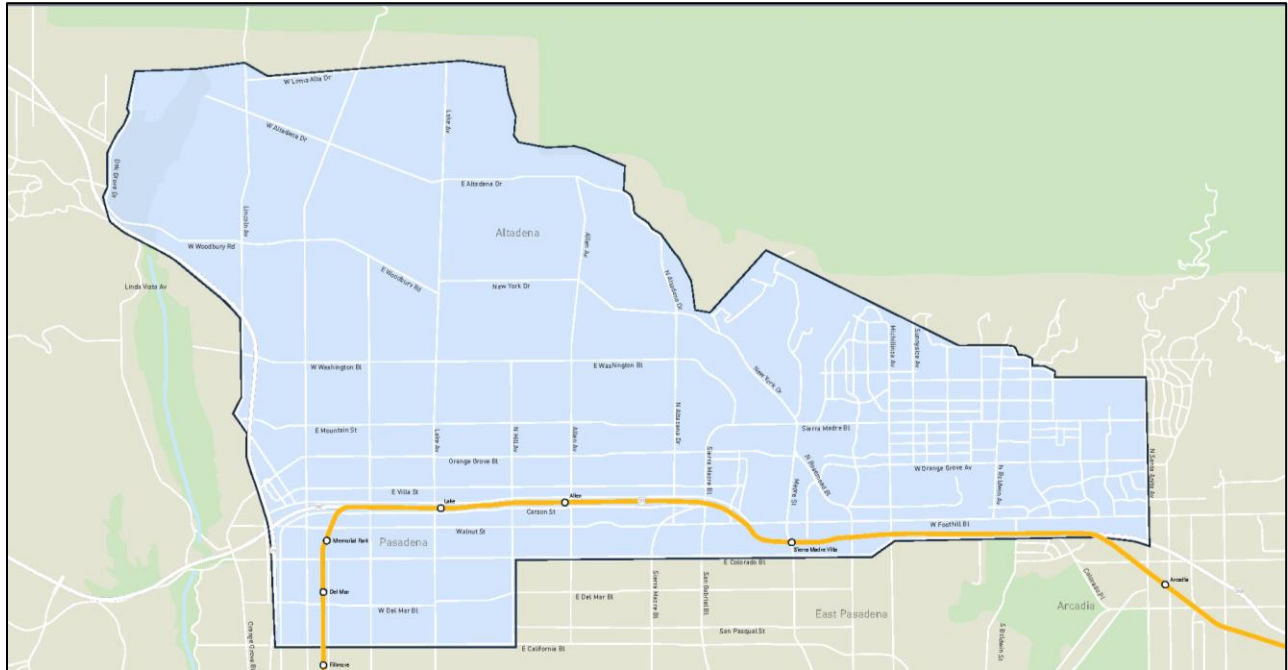


Zone boundaries and hours of operation will be adjusted based upon customer demand and utilization of the new service

Attachment B1

Zone 6: Altadena / Pasadena / Sierra Madre

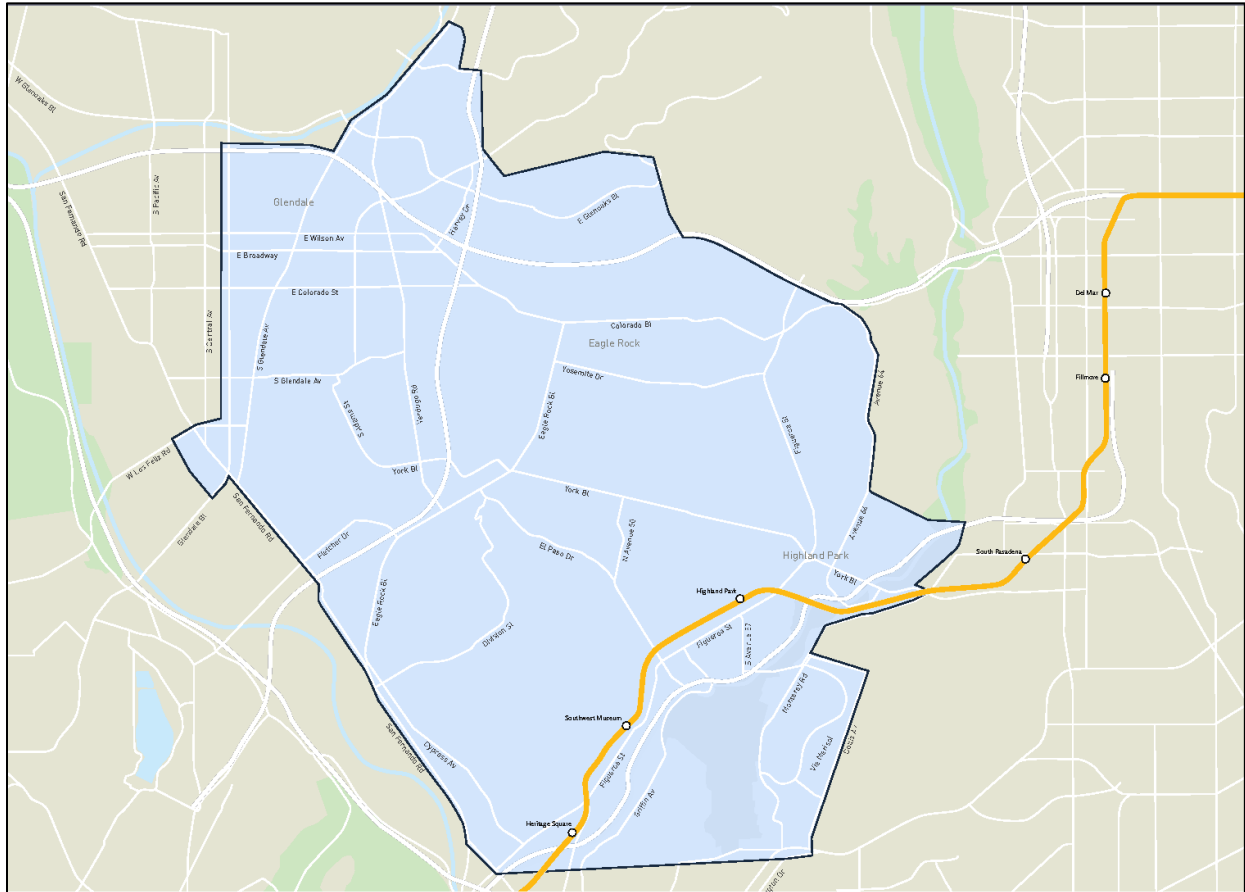
Daily Hours of Operation: 5:30 am to 9:30 pm



Attachment B2

Zone 7: Highland Park / Eagle Rock / Glendale

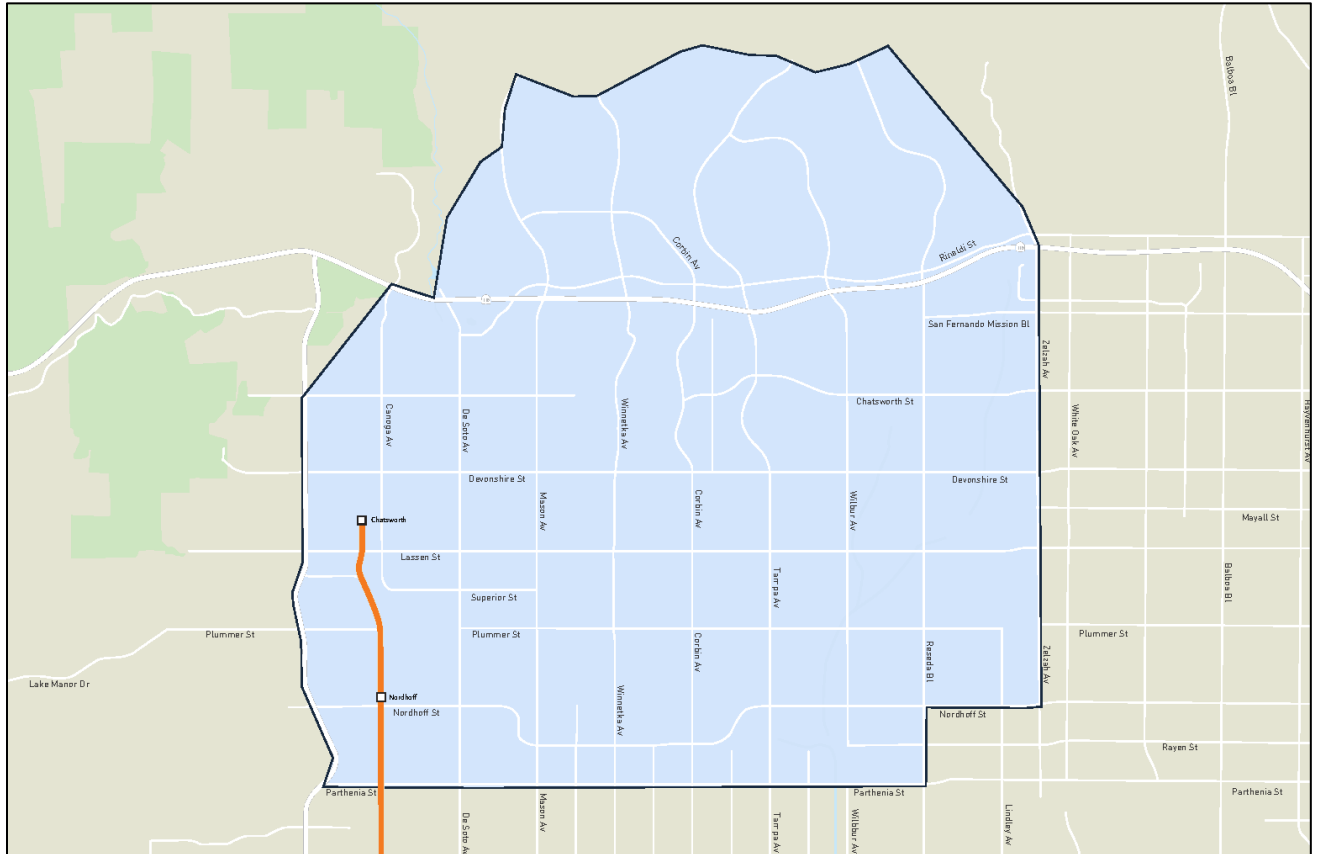
Daily Hours of Operation: 5:30 am to 9:30 pm



Attachment B3

Zone 8: Northwest San Fernando Valley

Daily Hours of Operation: 5:30 am to 9:30 pm



Attachment B4

Zone 9: UCLA / Westwood / Century City (Currently in Development)

Daily Hours of Operation: Currently in Development



A decorative graphic on the left side of the slide, featuring several colored dots (blue, orange, red) and thin white lines arranged in a pattern that suggests movement or a network.

MicroTransit

Operations Fare Structure and Service Zones

Executive Management Committee
May 20, 2021

Micro Launch Schedule

December 2020:

- ✓ Zone 1: Watts/Willowbrook
- ✓ Zone 2: LAX/Inglewood

January 2021:

- ✓ Zone 3: El Monte
- ✓ Zone 4: North Hollywood/Burbank
- ✓ Zone 5: Compton/Artesia

June 2021:

- ✓ Zone 6: Altadena/Pasadena/Sierra Madre
- ✓ Zone 7: Highland Park/Eagle Rock/Glendale

August 2021:

- ✓ Zone 8: Northwest San Fernando Valley

September 2021:

- ✓ Zone 9: UCLA/Westwood/Century City



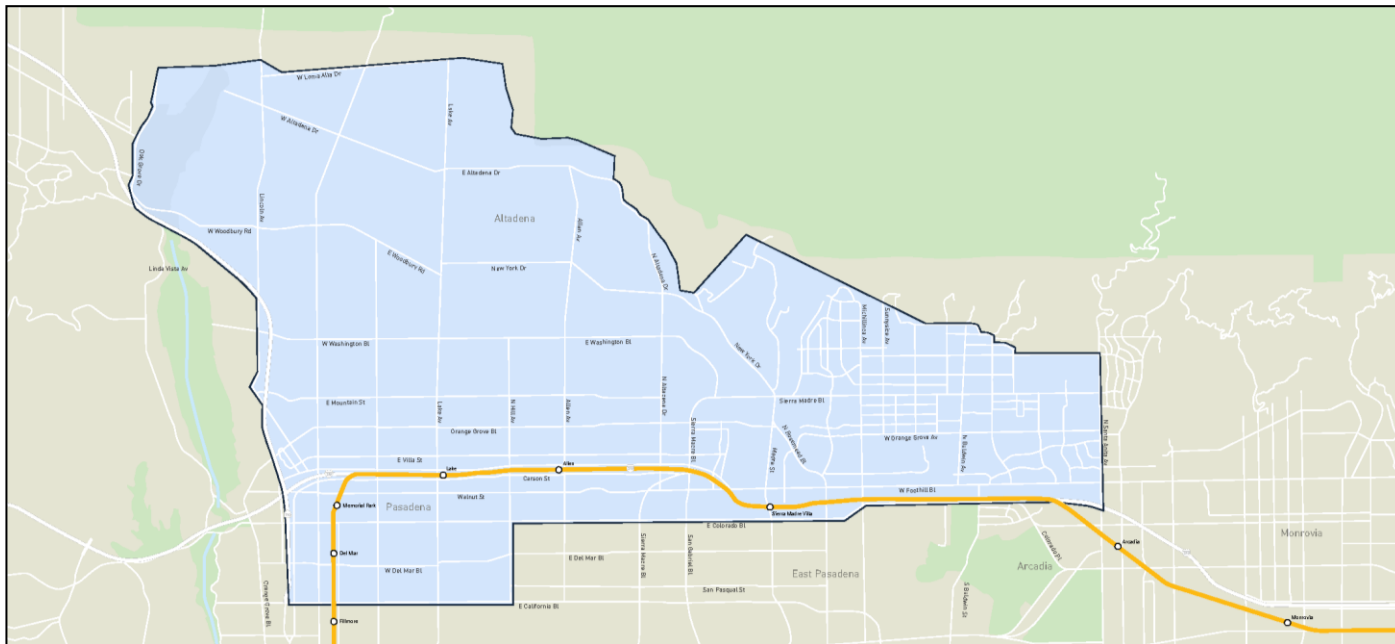
Recommendation

- ✓ In 2020, MicroTransit Operations assembled an internal working group to develop a recommendation on the MicroTransit Fare Structure.
- ✓ Metro staff recommended the full price to be set at \$2.50 per trip, aligned with the fare structure of the Silver Line. As a new on-demand service, MicroTransit is similarly priced to Access Services rates which are \$2.75 per trip for trips up to 19.9 miles and \$3.50 for trips more than 20 miles.
- ✓ In light of the pandemic, the working group recommended an initial introductory rate of \$1 per trip which was approved by the Board in October 2020.
- ✓ As part of current Board action, Metro staff seek an extension of the current introductory rate of \$1 through December 2021 and a roll out of the full fare of \$2.50 in January 2021. A transfer to Metro's fixed-route network (bus and/or rail) will be honored within the full fare of the trip, unless otherwise directed.

Zone 6: Altadena/Pasadena/Sierra Madre

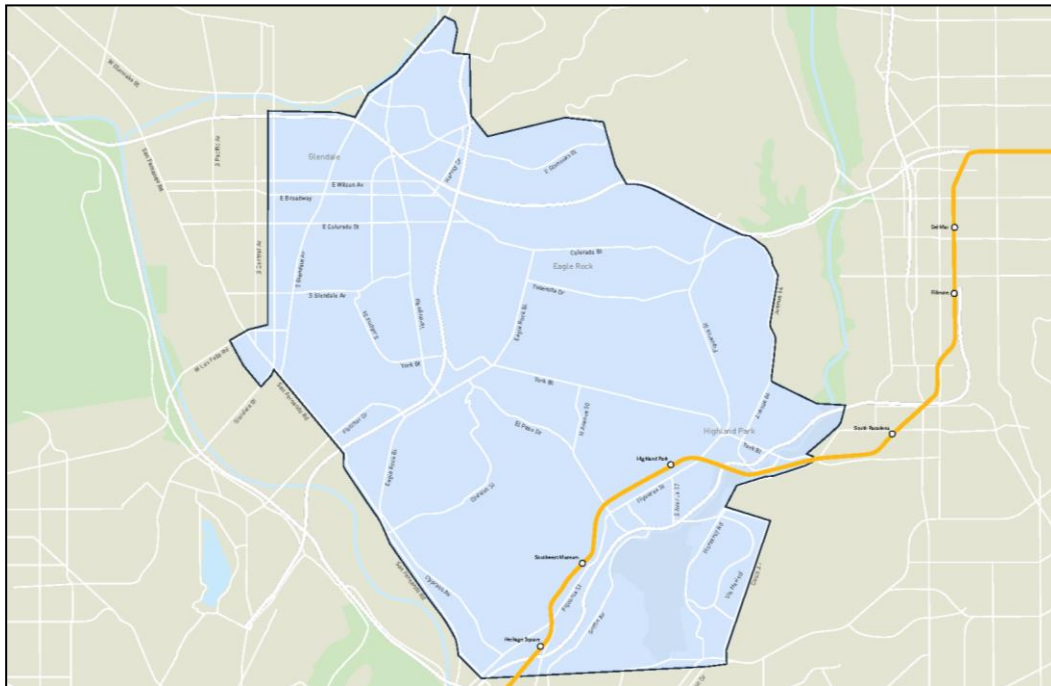


Daily Hours of Operation: 5:30 am to 9:30 pm



Zone 7: Highland Park/Eagle Rock/Glendale

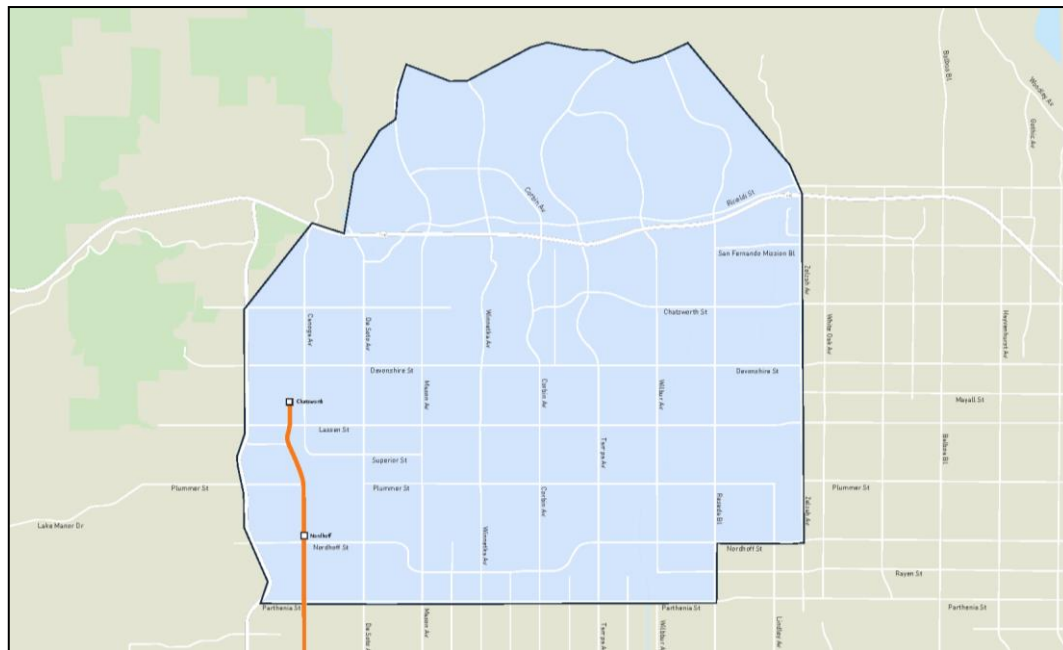
Daily Hours of Operation: 5:30 am to 9:30 pm



Zone 8: Northwest San Fernando Valley



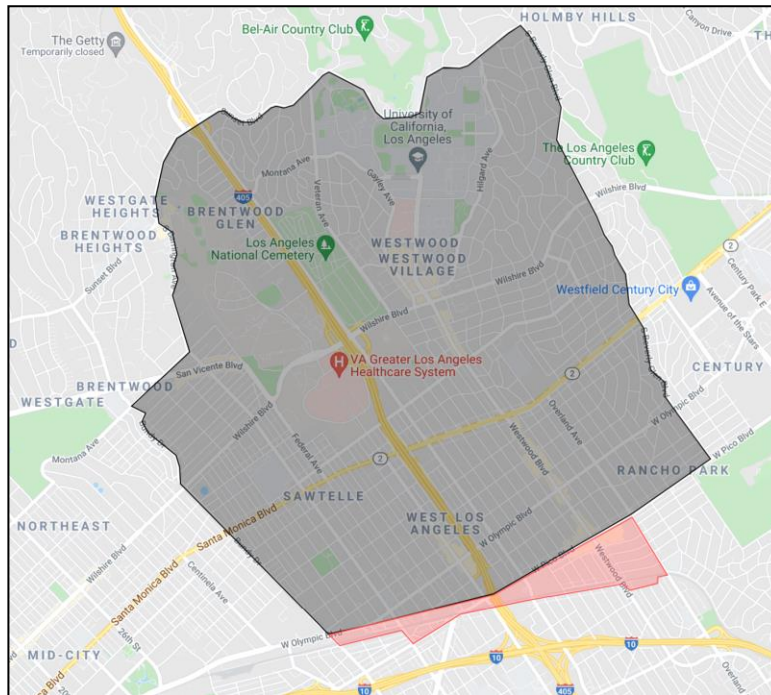
Daily Hours of Operation: 5:30 am to 9:30 pm



Zone 9: UCLA/Westwood/Century City

(Currently in Development)

Daily Hours of Operation: Currently in Development





Board Report

File #: 2020-0062, File Type: Contract

Agenda Number: 42.

EXECUTIVE MANAGEMENT COMMITTEE MAY 20, 2021

SUBJECT: EXECUTE CONTRACT WITH SOUTHERN CALIFORNIA EDISON (SCE) TO UPGRADE UTILITIES AT DIVISION 9 & EL MONTE TRANSIT CENTER, EXECUTE CONTRACT MODIFICATION WITH BYD FOR DIVISION 9 (D9) DEPOT CHARGERS, AND GRANT DESIGN-BUILD AUTHORITY FOR CHARGING INFRASTRUCTURE

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

AUTHORIZE the Chief Executive Officer to:

- A. NEGOTIATE AND EXECUTE a cost reimbursable Contract with SoCal Edison (SCE) to upgrade Division 9 (D9) and EL Monte Bus Depot utilities to support the full electrification of Battery Electric Buses procured from BYD, for an amount Not-To-Exceed \$19,565,853.
- B. EXECUTE Modification No. 7 to BYD Coach & Bus, LLC (BYD), to add forty-four (44) Heliox Depot Chargers, software licenses, installation and commissioning support, and twelve (12) year warranty service and support for D9 charging infrastructure at the Firm Fixed price of \$22,938,872 increasing the Contract Value from \$48,528,900 to \$71,467,772.
- C. INCREASE the Contract Modification Authority amount from \$4,777,472 to \$30,778,325 to incorporate upgrades to the charging infrastructure and for vehicle configuration changes for Contract OP28367-002, with BYD Coach & Bus, LLC.

CONSIDER:

- D. FIND that awarding a design-build delivery method authority, pursuant to Public Utilities Code Section 130242(b), will achieve for Metro certain private sector efficiencies through the integration of design, project work and components.

Approval requires a two-thirds affirmative vote.

- E. Approve the hiring of an initial five (5) new, non-contract full-time employees as a part of the FY22 midyear budget process to ensure the successful delivery of the ZEB program.

ISSUE

In July 2017, Metro's Board of Directors approved a motion to "convert the Metro Orange Line to full Zero Emission operation by 2020 and the Metro Silver Line as soon as feasible, thereafter."

In accordance with the Board motion staff executed contracts with BYD for 100 forty-foot Battery Electric Buses (BEB); a base order of 60 BEBs followed by an option order for 40. Concurrently, staff proceeded with designs to upgrade the charging infrastructure at D9, the El Monte Transit Center, and Harbor Gateway Transit Center (HGTC).

Approval of staff's recommendations is necessary to contract with SCE and BYD to upgrade the utilities and deliver and install the chargers and charging infrastructure necessary to support anticipated service levels with BYD 40' BEB's.

BACKGROUND

In July 2017 the Metro Board approved a motion to convert the Silver Line to full Zero Emission operation as soon as feasible, thereafter 2020. One element is to upgrade the utilities at D9 and the adjacent El Monte Transit Center to support the anticipated service with 40' BEB's. It is staff's recommendation for SCE to upgrade the charging locations with the necessary power and for BYD to provide the depot chargers. In parallel, Metro will initiate a solicitation for the civil work to install the chargers.

Power Supply

In support of the plan, SCE completed a Method of Service (MOS) study to analyze the existing sites and develop strategies to meet the charging needs at D9 and the El Monte Transit Center. In all, five charging options were considered.

- Only one, Option E, provides Metro with the anticipated 10 MW power, minimizes impact to operations, and provides the maximum resiliency to minimize risk of power outages. However, it will take approximately 44 months to complete the work once SCE is awarded a contract.
- Option A is considered only a temporary solution while work on one of the other options is performed. Option A can be implemented shortly after SCE is awarded a contract; however, the 10 MW will be available only during off-peak hours. During peak hours power will be limited to 5 MW. This option may be acceptable in the near term; however, it will create operational risk and does not offer the resiliency necessary to reduce the risk of power outages.

Therefore, it is staff's recommendation to issue a contract to SCE for Options A and E. This will permit Metro to initiate ZEB operation on the Silver Line once the depot and en-route charges are installed. One hundred percent ZEB operation from D9 will be possible when the Option E work is completed.

Chargers

BYD's contracts include delivery of depot chargers. However, these chargers use BYD's proprietary design, are non-standard, are compatible only with BYD equipment, and have limited eligibility for funding, e.g., they are not eligible for SCE Charge Ready Transport program.

Since the BYD contracts were first awarded July 2017, there has been significant advancement in charger standards and design. Chargers conform to approved standards allowing for compatibility with fleets from multiple vendors, have greater and faster charging capacity allowing for operational flexibility, and occupy a smaller footprint which is critical for our space-challenged depots. Therefore, it is staff's recommendation to issue BYD a contract modification to upgrade the chargers with a depot charging strategy utilizing SAE3105-1 overhead charging infrastructure.

Civil Work

Civil work at D9 and the El Monte Transit Center is required to install the chargers, electrical cabinets, and ancillary equipment. Typical work includes installation of concrete pads and running of conduits and wire. To minimize risk to project schedule, staff is seeking Board approval to use a design-build project delivery method for deploying charging infrastructure as appropriate.

PUC Section 130242 requires a finding by a two-thirds majority vote by the Board to use the design-build project delivery method.

DISCUSSION

SCE - MOS Study and Proposed Solutions

Prior to the MOS being initiated, SCE determined that 5 MW is currently available for D9 and the El Monte Transit Center. Staff calculated that 10 MW is required for the complete transition to 100% BEB operation from D9 and the El Monte Transit Center.

The MOS Study conducted by SCE offered Metro five (5) options to meet the charging needs. These proposed options are presented below, along with the associated costs and staff's assessments:

- Option A - \$149,644
 - Project Scope: Install necessary cable to support temporary service of 10 MW without Preferred Emergency (PE) Gear.
 - Staff assessment. Acceptable only as a temporary solution for startup service.
It may be possible for Metro to stay under the 5MW cap during peak hours by using robust charge management system, batteries, a larger solar installation, and on-site power generation. It may be necessary for SCE to allow 10MW of load to flow permanently during off peak hours. This option would save over \$19M in upfront costs, but comes with additional risks if the charging cannot be consistently performed to stay under the cap. In addition, the El Monte Transit Center charging requirements make this option very difficult to achieve.
- Option B - N/A
 - Project Scope: Install necessary cable to support temporary service of 10 MW with PE Gear.
 - Staff Assessment: N/A
SCE determined that serving the requested load with PE gear is not feasible due to reliability and operational requirements; therefore no scope or cost was provided.

- Option C - \$5,237,746
 - Project Scope: Install (1) 66/12 kV 28 MW transformers and (1) 66 kV line without redundancy.
 - Staff Assessment: Not recommended.
Option C proposes the addition of a new customer-dedicated substation and installing a new tap configuration 66kV line segment (approximately 0.6 mile) from the existing Anita-Amador 66 kV Line to Metro Substation creating the new Anita-Amador-Metro 66 kV Line. It is noted that the substation would be dedicated to Metro but would be owned by SCE.
- Option D - \$15,757,721
 - Project Scope: Install (1) 66/12 kV 28 MW transformer and (2) 66 kV lines for transmission line redundancy.
 - Staff Assessment: Not recommended.
Option D proposed the addition of a new customer-dedicated substation with one (1) transformer and two (2) 66 kV lines. Option D saves nearly \$3.7M as compared to Option E but adds a risk power outage due to transformer failure. While the probability of transformer failure is low, any failure would disrupt service until the transformer is replaced.
- Option E - \$19,416,209
 - Project Scope: Install (2) 66/12 kV 28 MW transformers and (2) 66 kV lines for transmission line and transformer redundancy.
 - Staff Assessment: Recommended.
Option E proposes the addition of a new customer-dedicated substation with two (2) transformers and two (2) 66 kV lines; the maximum resiliency available. SCE studied looping in the existing Anita-Amador 66 kV Line by installing approximately 0.9 mile of new underground circuit from Metro's Sub-station to the existing Amador-Anita 66 kV Sub-transmission Line creating the new Amador-Metro 66 kV Line and installing approximately 0.78 mile of overhead and underground circuit creating the new Anita-Metro 66 kV Line. The construction schedule is around 44 months for this option.

SAE3105-1 Depot Chargers

The proposed solution by BYD requires installing an overhead inverted pantograph per bus; e.g., 100 total, to charge the BEBs while parked. The pantographs will be suspended from an overhead gantry fitted with one 175kW Heliox charger providing power to every three pantographs. This system complies with the SAE J3015-1 overhead charging standards.

Additionally, CNG fueling lanes will be equipped with a 450kW charger per lane so buses can get a burst of charge while being cleaned. This maintains an operational commonality with CNG buses that will still be at D9 during the transition. Additionally, this helps reduce the peak electrical demand on the electric circuit.

Civil Work | Design-Build

Design-build is a method of project delivery through which Metro contracts directly with a single entity that is responsible for both design and subsequent construction services for the stated project. Metro

has successfully utilized design-build contracts on various capital programs. Staff seeks suitable opportunities to utilize the design-build delivery method for the civil work associated with the charging infrastructure. The design-build approach offers numerous benefits:

- A single point of responsibility for design, installation, and construction.
- Functional specifications are provided which promotes more open competition
- More budgeted projects can be accomplished by adding design/build capacity.
- Risk for design is shifted to the design/build contractor; therefore, changes related to design may be minimized.
- Schedule efficiency and significant time savings may be realized because construction may proceed while design is being finalized.
- Administrative costs may be reduced by combining the solicitation process for the design and construction phases;
- Save construction management and engineering resources during the construction phase; and
- Minimize contractor-generated changes resulting in a reduced contract closeout time.

These contracts will be awarded to the lowest price responsive, responsible bidder meeting the requirements set forth in the invitation for bids.

Approve Addition of Staff

Successful execution of a charging infrastructure program requires a skilled and experienced staff exclusively dedicated to this effort. Staff is requesting the approval of five (5) new non-contract positions in FY22 as listed below:

- Two (2) Sr. Manager Project Control. In the coming months, it is anticipated that two concurrent civil projects will be active at different locations. Each should be staffed with a Sr. Manager, Project Control.
- Two (2) Sr. Engineers. Minimally, each Sr. Manager Project Control should be supported by a Sr. Engineer.
- One (1) Sr. Analyst. It is anticipated that the projects will need to be supported by an analyst to coordinate budget and financial matters with Metro's internal stakeholders.

This initial request is part of the total FTE need for infrastructure support which is planned as part of the Zero Emission Bus (ZEB) program. The five (5) positions will be hired on using available FTEs created through the FY22 midyear budget process. Upon approval of Recommendation E, staff will immediately commence recruitment processes to establish a ZEB specific qualified candidate pool for the five (5) positions with anticipated start dates of Q2/Q3 of FY22. This will be done through the FY22 midyear budget process. As the scale of the work evolves, staff may return and request Board approval for additional positions.

Staff's Recommendation

1. SCE - MOS Study and Proposed Solutions: Staff recommends executing Options A and E.

Option A will allow Metro to maintain and continue operation, initiate ZEB service while the major substation upgrade is performed. Option E will allow Metro to meet its long-term power needs with the greatest level of resiliency available. This approach will provide 10 MW and be scalable to increased power levels, if needed.

2. SAE3105-1 Depot Chargers: The solution proposed by BYD is considered the most robust and efficient in terms of operation and maintainability. It also ensures compatibility with manufacturers employing the same standards.
3. Design-Build: This authorization allows Metro to potentially reduce schedule, minimize risk to Metro, and reduce costs.

DETERMINATION OF SAFETY IMPACT

There is no impact to safety. Recommendations A-D will allow Metro to initiate ZE operations on the Silver Line in the quickest and most cost-effective manner and provide the electrical power to support further expansion of ZE operation.

FINANCIAL IMPACT

Budget for the recommended action is included in the Life of Project (LOP) budget of Capital project 201077 - BYD 40 Foot Zero Emission Buses. Due to SCE payment requirements, a payment is scheduled for early FY22. Staff will closely monitor the financial situation and if needed, will request Board approval of a Mid-year budget amendment to make the payment. Since the project requires multi-year contracts, the Cost Center Manager, and Project Manager will be responsible for future fiscal year budgeting.

Impact to Budget

The combined funding for these actions include Federal, State and Local sources including Green Funds. Staff can also pursue funds such as LCTOP and BOS 5307 for this electrification effort. Staff also continues to pursue all additional grant and rebate opportunities as they materialize. This will help ensure that the Bus Acquisition and Electrification Program remain funded while enacting the fleet conversion to Zero Emissions by 2030.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

These recommendations support Goal #3, Enhance communities and lives through mobility and access to opportunity and Goal #4 Transform LA County through regional collaboration and national leadership.

ALTERNATIVES CONSIDERED

Staff has considered leaving the existing circuit that supplied both Division 9 and El Monte Transit Center SCE service delivery alone; however, this approach is not recommended as this cannot

support the Board's directive to convert the entire fleet to zero emission buses.

The Board of Directors may choose not to authorize the Contract award for this project; however, this alternative is not recommended as this is critical to facilitate the timely execution and associated deliverables of Metro's ZEB Master Plan and Vehicle Engineering and Acquisition capital and operating projects.

NEXT STEPS

Upon Board approval, staff will continue to competitively award individual task orders, on an as-needed basis, for engineering, technical, and program management support services. Also, staff will commence recruitment activities for the five (5) positions critical to support the ZEB program and hire these positions when the FY22 budget is amended.

ATTACHMENTS

Attachment A - Procurement Summary
Attachment B - Contract Modification Log
Attachment C - DEOD Summary
Attachment D - Funding / Expenditure Plan

Prepared by: Marc Manning, Senior Director, Vehicle Engineering and Acquisition (213) 922-5871
Jesus Montes, Senior Executive Officer, Vehicle Engineering and Acquisition (213) 418-3277

Reviewed by: James T. Gallagher, Chief Operations Officer (213) 922-4424
Debra Avila, Chief Vendor/Contract Management Officer (213) 418-3051

PROCUREMENT SUMMARY

**ZIXTY 40-FOOT ZERO EMISSION TRANSIT
BUS CONTRACT / CONTRACT NO. OP28367-002**

1.	Contract Number: OP28367-002			
2.	Recommended Vendor: BYD Coach & Bus, LLC (BYD)			
3.	Mod. Work Description: See Attachment B			
4.	Contract Work Description: See list of pending and negotiated changes in Attachment B.			
5.	The following data is current as of: 4/2018			
6.	Contract Completion Status		Financial Status	
	Contract Awarded:	9/08/2017	Contract Award Amount:	\$47,774,723
	Notice to Proceed (NTP)	9/08/2017	Total of Modifications Approved:	\$754,177
	Original Complete Date:	8/16/2019	Pending Modifications (Including this action)	\$22,938,872
	Current Est. Complete Date:	11/01/2021	Current Contract Value (with this action)	\$71,467,772
7.	Contract Administrator: Joe Marzano		Telephone Number: 213-922-7014	
8.	Project Manager: Julio Rodriguez		Telephone Number: 213-922-6603	

A. Procurement Background

This Board Action is to approve Contract Modification No. 6 for on-route opportunity charger licenses and monitoring for forty-four (44) depot-chargers, one hundred twenty (120) smart charging licenses, one hundred twenty (120) monitoring licenses, support for installation, commissioning of all the chargers, and twelve (12) years of extended warranty for service and maintenance to support Metro's Bus Operations and infrastructure for the Silver Line in the amount of \$22,938,872.

This Contract Modification will be processed in accordance with Metro's Acquisition Policy and the contract type is a firm fixed unit price.

On July 20, 2017, the Board awarded Contract No.: OP28367-002 to BYD Coach & Bus, LLC, for the manufacture and delivery of the 60 units of the 60' ZE transit buses in the Not-to-Exceed amount of \$47,774,723. Attachment B shows the list of pending and negotiated change orders.

B. Cost/Price Analysis

The recommended price of \$22,938,871.73 including tax, has been determined to be fair and reasonable based upon an independent cost estimate, cost analysis, technical evaluation, fact finding, and negotiations.

Proposal Amount	Metro ICE	Negotiated Amount
\$22,938,872	\$27,313,908	\$22,938,872

CONTRACT MODIFICATION/CHANGE ORDER LOG

BYD COACH & BUS, LLC. -FOOT ZERO EMISSION TRANSIT BUS CONTRACT OP28367-002

Mod. no.	Description	Status (approved or pending)	Date	\$ Amount
1	Modify SP-38 LEP definition of Disadvantage Worker	Approved	1/9/19	\$ 0
2	Exercise 3.0 Optional Configuration - APC PF-1	Approved	12/3/19	\$326,780
3	Extend Period of Performance for Base Buy to 11/1/2021	Approved	12/27/19	\$ 0
4	Negotiated changes in configuration on base buy buses	Approved	4/16/20	(\$473,710)
5	Procure 10 shop chargers	Approved	9/30/20	\$450,514
6	On-Route OPP chargers (8) Difference from original 300kW to 450kW	Approved	4/12/21	\$450,592.80
7	Depot Chargers, Licenses, Monitoring, Infrastructure	Pending	Open	\$22,938,871.73
	Modification Total:			\$23,693,048.70
	Original Contract:	Approved	9/8/17	\$47,774,723
	Total:			\$71,467,771.70

DEOD SUMMARY**BYD COACH & BUS, LLC - FORTY-FOUR (44) HELIOX DEPOT CHARGERS, SOFTWARE LICENSES, INSTALLATION AND COMMISSIONING SUPPORT, AND TWELVE (12) YEAR WARRANTY SERVICE AND SUPPORT FOR D9 CHARGING INFRASTRUCTURE / OP28367-002****A. Small Business Participation**

BYD Coach and Bus, LLC, a Transit Vehicle Manufacturer (TVM), is on the Federal Transit Administration's (FTA) list of eligible TVMs. BYD Coach and Bus, LLC reported that it submitted its overall Disadvantaged Business Enterprise (DBE) goal of 3% to FTA for FY20, in compliance with 49 Code of Federal Regulations (CFR) Section 26.49(a)(1). TVMs submit overall DBE goals and report participation directly to FTA annually.

B. Living Wage and Service Contract Worker Retention Policy Applicability

A review of the current service contract indicates that the Living Wage and Service Contract Worker Retention Policy (LW/SCWRP) was not applicable at the time of award. Therefore, the LW/SCWRP is not applicable to this modification.

C. Prevailing Wage Applicability

Prevailing Wage is not applicable to this modification.

D. Project Labor Agreement/Construction Careers Policy

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract. Project Labor Agreement/Construction Careers Policy is applicable only to construction contracts that have a construction contract value in excess of \$2.5 million.

E. Local Employment Plan

Local Employment Plan Program is applicable on this contract. Staff will monitor progress on all LEP commitments, including the contractual commitments in creating employment opportunities in the State of California and the 40% commitment to hire disadvantaged workers.

**Funding and Expenditure Plan
CP201077**

Attachment D

In Thousands	Expenses Through FY20	FY21 YTD Q3	FY21 Q4	FY22	FY23	FY24	Total LOP	% of Total
Uses of Funds								
Vehicles & Charging Infrastructure	\$ -	\$ -	\$ 19,566	\$ 6,882	\$ 16,057	\$ -	\$ 42,505	
Spare Parts, Optional Features, Training Aids	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Travel/Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Project Costs	\$ -	\$ -	\$ 19,566	\$ 6,882	\$ 16,057	\$ -	\$ 42,505	
In Thousands	Expenses Through FY20	FY21 YTD Q3	FY21 Q4	FY22	FY23	FY24	Total LOP	% of Total
Sources of Funds								
State: LCTOP			\$ 19,566	\$ 6,882	\$ 12,552		\$ 39,000	
Local: PC40% / MR 2% / General / Other					\$ 3,505		\$ 3,505	
Total Project Funding	\$ -	\$ -	\$ 19,566	\$ 6,882	\$ 16,057	\$ -	\$ 42,505	

Note: Funding plan depicts the sources for the proposed recommendations.

LCTOP is a state approved funding source for this project and use.

Other Local funding sources are eligible sources for the use of funds in excess of LCTOP.

SCE | Upgrade Utilities for Division 9 & El Monte Transit Center BYD | Deliver Depot Chargers for Division 9



Metro

**Executive Management Committee
May 20, 2021**

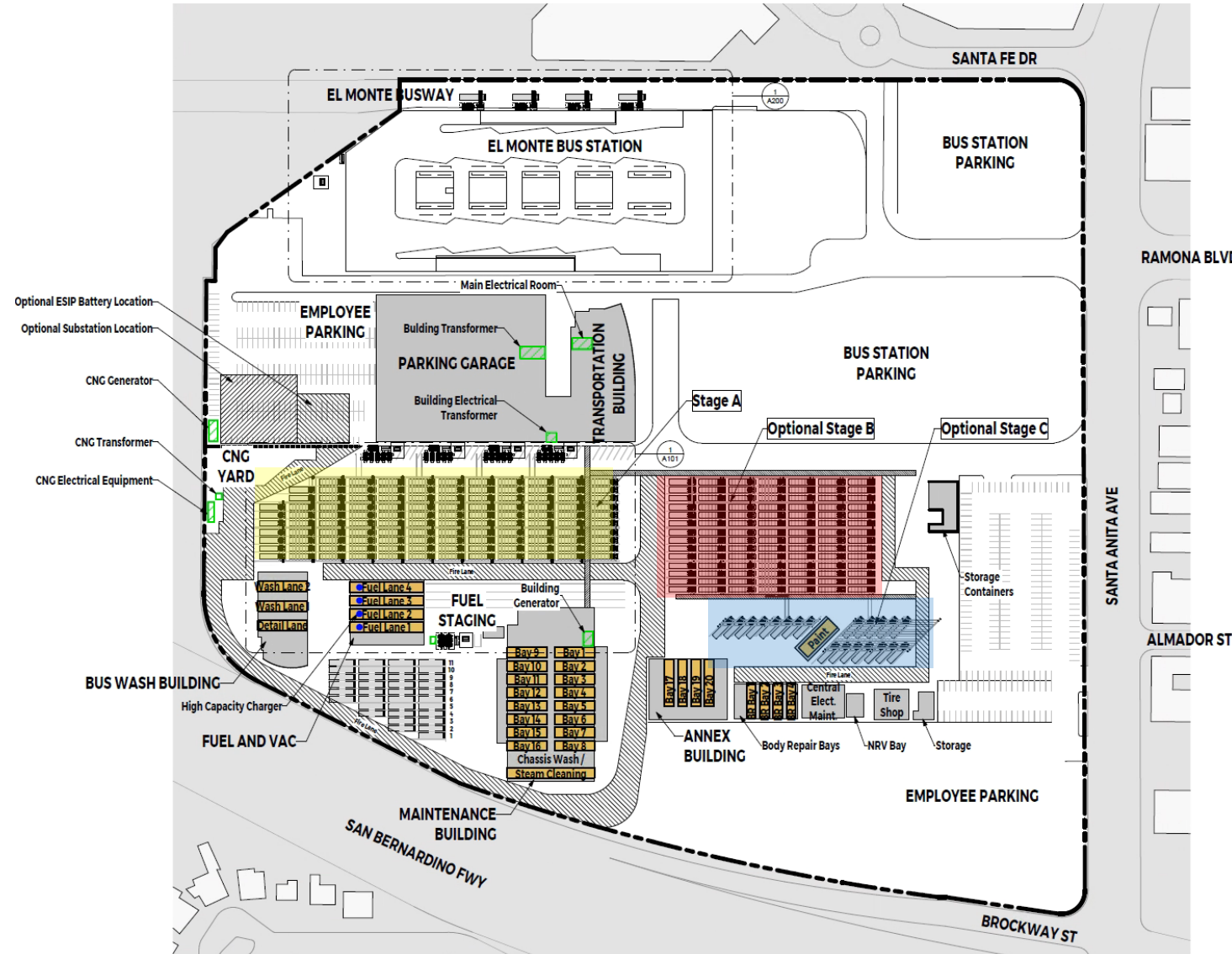
Introduction

- ❑ Approval of recommendations required to initiate conversion of D9 and El Monte Transit Center for Zero Emission Operations
 - ❑ SCE | Upgrade Utilities
 - ❑ BYD Change Order | Deliver Depot Chargers
- ❑ Modeling performed to optimize power requirements & charging strategies
- ❑ Method of Service Study performed by SCE to identify best options for delivering required power



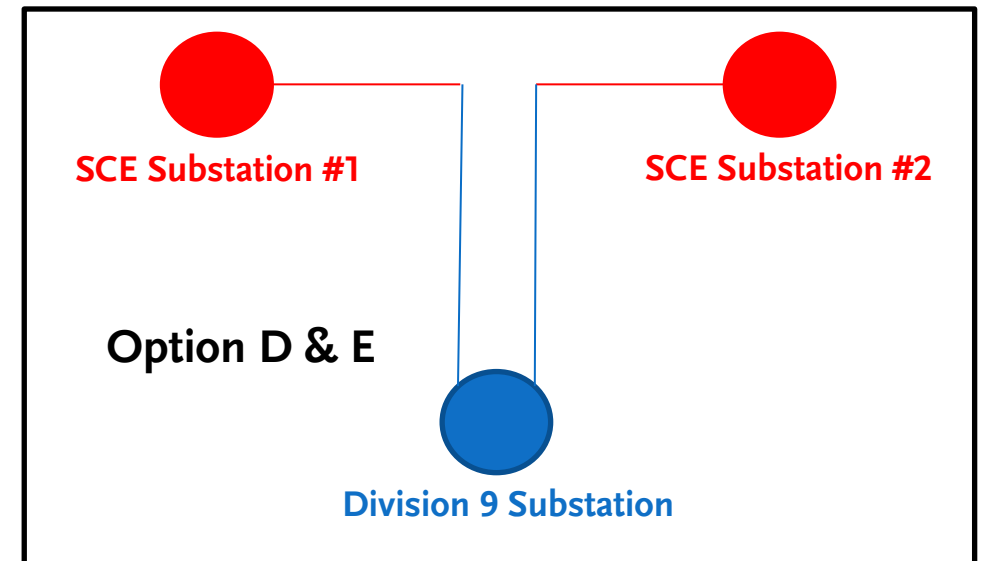
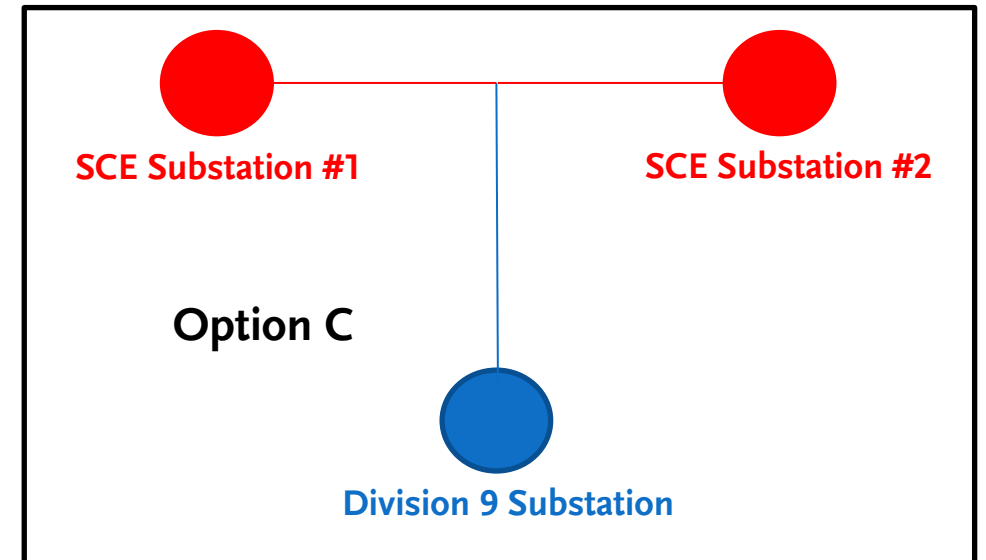
Modeling | Division 9 Charging Layout

- ❑ Heliox Charging System Service Proven in N. America & Europe
- ❑ Charging compatible with Proterra, New Flyer, Nova and BYD
- ❑ Optimizes Use of Limited Space
- ❑ Allows for optimization of bus battery capacity, minimizes need for long-range buses
- ❑ Variable Charger Output allows reduction in power demand – cost savings
- ❑ Supports multi-stage transition – Work can be performed as funds are available.



SCE Utility Upgrade for Division 9 & El Monte Transit Center

- ☐ Five Options offered (A – F).
 - ☐ Option A is interim for up to 10 MW only during off-peak hours.
 - ☐ Option B withdrawn as not viable
 - ☐ Option C: 1 power line & 1 transformer
 - ☐ Option D: 2 power lines & 1 transformer
 - ☐ Option E: 2 power lines & 2 transformers
- ☐ Recommendation is to select Options A & E:
 - ☐ Option A (\$149,644) allows most immediate transition to Zero Emission operations
 - ☐ Option E (\$19,416,209) provides highest level of resiliency. Also, increases available demand from 5 MW to 15 MW



Overview | BYD Project

Contract:

- Base order of sixty 40' BEB's
- Option order for forty additional 40' BEB's, 100 total
- Proprietary Plug-in Chargers

Current Status:

- Change order successfully executed to update charging strategy from proprietary plug-in and inductive charging to industry standards: SAE-J1772 CCS1(Plug-in) & SAE-J3105/1 (overhead cross-rails/pantograph)
- Five pilot buses delivered between January and March 2021; first buses in the world equipped with both charging strategies
- Pilot buses currently undergoing comprehensive field testing.

Recommendation:

- BYD originally proposed delivery of proprietary plug-in chargers.
- Given rapid advancements in both zero emission bus and battery charger technology, decision was made to adopt SAE standard charging strategies
- Approval of recommendation for delivery of forty-four (44) depot chargers is required to ensure equipment is available to effectively and efficiently charge the battery electric buses being delivered.

