



**JTC Public Transportation Advisory Panel – 2010**

<b>Position</b>	<b>Name</b>	<b>Area</b>	<b>Comments</b>
Senate Democrat	Senator Mary Margaret Haugen	Island County (Snohomish, Skagit)	Chair, Senate Trans Comm. Co-Chair, JTC
Senate Democrat	Senator Brian Hatfield	Pacific County (Wahkiakum Cowlitz GH)	Senate Trans Committee
Senate Republican	Senator Dan Swecker	Thurston County (Lewis)	Ranking Republican, JTC & Senate Trans Committee
Senate Republican	Senator Curtis King	Yakima County	Senate Trans Committee
House Democrat	Representative Judy Clibborn	Mercer Island, King County	Chair, House Trans Comm. Co-Chair, JTC
House Democrat	Representative Jim Moeller	Clark County	House Trans Committee
House Democrat	Representative Marko Liias	Snohomish County	Vice-Chair, House Trans Committee
House Republican	Representative Mike Armstrong	Chelan County	Ranking Republican, House Trans Committee & JTC
House Republican	Representative Terry Nealey	Columbia County (Walla Walla, Benton)	House Trans Committee
WSDOT Public Transportation Division	Katy Taylor	Washington State Department of Trans.	Director, WSDOT Public Transportation Division
Representative of Special Needs Users	Kelly Scalf	Pend Oreille County	Community Transportation Assoc Northwest, 2nd VP
Representative of Transit System Users	Levi Wilhelmsen	Pierce County	Pierce Transit rider & commuter. Lakewood Trans Adv Committee
Transit Agency Rep.	Richard DeRock Link Transit	Chelan County Douglas County	General Manager Former ACCT member
Transit Agency Rep.	Kevin Desmond, King County Metro	King County	General Manager
Transit Agency Rep.	Martha Rose Island Transit	Island County	General Manager
Regional Transit Authority	Joni Earl Sound Transit	Sound Transit, King, Pierce & Snohomish counties	Chief Executive Officer
Regional Transportation Planning Organization Eastern WA	Page Scott Yakima Valley Conference of Governments	Yakima County	Executive Director CTR Board Member ACCT Board Member
Regional Transportation Planning Organization Western WA	Charlie Howard, Puget Sound Regional Council	King, Snohomish, Pierce & Kitsap counties	Transportation Planning Director CTR Board Member
Major employer or major work site	Rick Benner, Western Washington	Whatcom County	Executive Director/ University Architect Capital Planning and

<b>Position</b>	<b>Name</b>	<b>Area</b>	<b>Comments</b>
	University		Dev.
Major employer or major work site	Jim Stanton, Microsoft Redmond	King County	King County Regional Task Force on Transit Member
Major employer or major work site	Ted Horobiowski, Avista, Spokane	Spokane County	Fleet Services Manager Avista Utilities CTR Board Member
Major employer or major work site	Hans van Someren Greve, Stemilt Growers, Wenatchee	Chelan County	Large fruit growing and handling operation
Environmental Organization	Virginia McIntyre,	Benton County	League of Women Voters, Richland
Environmental Organization	Chuck Ayers, Seattle	King County	King County Regional Task Force Bicycle Advocate
Collective Bargaining Organization	Karen Stites, Amalgamated Transit Union	Thurston County	ATU, formerly Grays Harbor Transit operator
Additional: State Ferry	Alice Tawresey	Kitsap County	Former Trans Commissioner and former Mayor of Bainbridge
Additional: Private Bus Operator	Gladys Gillis	King County	Owner and CEO, Starline Luxury Coaches
Additional: Rural Transit	Dave O'Connell, Mason County Transit	Mason County	General Manager Former TIB member
Additional: Transportation Consultant	Tom Jones	King County	Consultant, experience with public transportation issues

## Meeting Summary

### JTC State Role in Public Transportation Public Transportation Advisory Panel – Workshop #1

Tuesday, July 29, 2010  
9:00 a.m. – 12:00 p.m.

Sound Transit Union Station – Ruth Fisher Board Room

#### In attendance:

- Senator Mary Margaret Haugen, Senate Transportation Committee Chair
- Representative Judy Clibborn, House Transportation Committee Chair
- Senator Brian Hatfield, District 19
- Senator Curtis King, District 14
- Representative Jim Moeller, District 49
- Representative Marko Liias, District 21
- Representative Mike Armstrong, District 12
- Katy Taylor, WSDOT
- Kelly Scalf, Rural Resources
- Richard DeRock, Link Transit
- Kevin Desmond, King County Metro Transit
- Martha Rose, Island Transit
- Ron Tober, Sound Transit (alternate)
- Page Scott, Yakima Conference of Governments
- Charlie Howard, Puget Sound Regional Council

- Rick Benner, Western Washington University
- Jim Stanton, Microsoft
- Ted Horobiowski, Avista Corp.
- Virginia McIntyre, League of Women Voters
- Chuck Ayers, Cascade Bicycle Club
- Karen Stites, Amalgamated Transit Union, 1765
- Gladys Gillis, Starline Luxury Coaches
- Tom Jones, Consultant

#### Not in attendance:

- Senator Dan Swecker, District 20
- Representative Terry Nealey, District 16
- Levi Wilhelmsen, rider
- Hans Van Someren Greve, Stemilt Growers
- Alice Tawresey, former Transportation Commissioner
- Dave O'Connell, Mason County Transit

The first workshop with the Joint Transportation Committee (JTC) Public Transportation Advisory Panel was held on June 29, 2010. The workshop was attended by 22 of the Advisory Panel members. The meeting started with welcoming remarks by Representative Judy Clibborn and panel member introductions, which included discussing what they hoped to achieve out of this study. The Parsons Brinckerhoff team, led by Sheila Dezarn and Barbara Gilliland, gave an overview of the key research to begin discussions in four key areas:

- Existing State Role
- Summary of Unmet Needs
- Introduction to Performance Management
- Other State Programs

## Introductions

Representative Clibborn welcomed the panel members and thanked them for their willingness to participate in this study. The legislature has heard from advocates over the years regarding public transportation needs and funding. This work is to help re-assess the state's role in public transportation and consider how it should be integrated into an overall transportation system.

Panel members introduced themselves and highlighted their interest in being on the panel and what they hope to get out of this work. A summary of key interests included:

- Shared Vision
  - Public transportation's role in achieving state interests (i.e. energy conservation, safety)
  - Public transportation as an integral element of the transportation system
  - Understanding of the greater public transportation network and issues
  - Understanding of special needs, senior and rural area mobility issues
  - Performance monitoring
- Improving Public Transportation
  - Access
  - Land use/transportation connections
  - Increasing ridership
- Funding
  - Understanding the state's investment
  - Partnerships and collaboration
  - Innovative Programs
  - Sustainable sources

### **Study Purpose and Key Themes from Panel Interviews**

Sheila Dezarn reviewed the primary purpose for this study – to identify the state role in public transportation and develop a statewide blueprint for public transportation to guide state investments. This work is to take a broader look at public transportation. In addition, Senator Haugen stated that one of our purposes is to ferret out which laws prevent innovation and creativity so we can move forward in the future.

Barbara Gilliland reviewed the themes that came out of the interviews with individual panel members. Four overarching themes came out during her discussions regarding the key areas where the panel should focus:

- One size does not fit all – need a mix of strategies, goals, roles, and programs
- Focus on the big picture – emphasize multimodal and connective services
- Meeting state goals – reduce barriers to cost effectiveness and address urban and rural issues
- Funding – focus on sustainability, coordination, and funding flexibility

The panel discussed the need to develop innovative solutions that did not necessarily call for greater funding from the state. This included discussions regarding joint use/funding of existing park and rides, looking at city policies regarding parking and the use of other existing lots as park and rides. Review of federal and city restrictions may be necessary to remove barriers to use. The benefits of allowing private providers to use or lease space at park-and-rides was also discussed, which was supported by those who were involved in special event transportation. In addition, a suggestion was made to consider intermodal connectivity outside of traditional transit modes.

Possible technology innovations could be useful for better integration, especially improving connectivity between bus and ferry passengers.

There is a need to better understand changing demographics and land use decision impacts on public transportation. This includes looking at how health care changes and the needs of elderly populations are changing.

### **Phase 1 – Research and Analysis**

The PB team then gave a series of presentations providing background and summarizing beginning research in three key topic areas: Existing State Role; Unmet Public Transportation Needs and Performance Management. Sheila Dezarn began the discussion by outlining that states generally serve four types of functions.

- Policy – planning – leadership
- Direct involvement in providing services and/or facilities
- Funding
- Oversight – coordination

This overview was followed by presentations and discussion in each research area.

**The Existing State Role:** PB researcher Allison Dobbins presented initial findings in this area. She discussed federal requirements and related state-supported services/programs, legislation, and policies. The state’s current activities are broad and include activities in each state functional area. The state plays an active role in policy and planning; it operates elements of the public transportation network including the Ferry and HOV systems; it manages some federal grants, authorizes taxing options for local and regional transit providers; it provides some direct state funding for capital and operational needs; and finally, it provides coordination services and some monitoring.

Discussion following this covered a number of areas. This included discussion regarding state policies, economic development and funding as the drivers of public transportation interests.

#### **GMA/CTR**

- It was suggested that the team review GMA policies and/or reports regarding Facilities of Statewide Significance as a resource to identifying needs related to overall mobility
- State facility siting decisions through GSA should be reviewed for accessibility to public transportation
- Legislation encourages reduction in vehicle use and promotes better land use integration and use of non motorized solutions
- Better support for employer programs to encourage other modes of travel to work

#### **Economic Development**

- Look at how investment in public transportation can lead to development and target support to these types of investments
- Look at MPO/RTPO plans for linkages between public transportation investments and economic development initiatives

#### **Funding**

- Review the funding split between federal/state/local programs
- New federal opportunities such as Livable Communities Initiative and Veterans Transportation

- Look at revised grant criteria that focuses on objectives such as reduced VMT and/or sustainable communities
- Development of cooperative purchase programs for multiple agencies

Finally, there were general comments made about the use of facilities, and that programs should focus on improving bus services into and around urban areas. Urban transportation bus systems are the largest provider of services.

**Unmet Needs:** PB researcher Larry Sauve also presented his initial review of documents that outlines unmet needs in public transportation. This research topic provided a review of current types of public transportation programs, a review of current funding options, and a discussion of emerging issues and trends. Emerging issues and trends included:

- Recession – effects of sales tax declines on operating revenues and the deferral of capital programs
- Roadway capacity expansion limitations in urban areas are leading to greater emphasis on public transit
- State policies that increase demand for public transportation such as recent Green House Gas and Commute Trip Reduction legislation requiring reduction in vehicle miles of travel statewide
- Demographic trends of an aging population that is tending to move to rural areas

Key comments included:

- Revenue shortfalls in the near term can affect funding streams for years to come
- Current service cuts and delayed capital projects can have a long term effect on the ability of agencies to expand/enhance service in the future, because we have lost critical infrastructure
- We need to understand the split between dollars needed for capital versus those necessary for ongoing operations
- CTR is a good example of public/private contribution that results in an 18:1 return on investment
- There is a difference between addressing needs of the voluntary rider versus the needs of a transit-dependent rider

There were questions regarding overlapping services, especially between different state programs and if there were better ways to coordinate and use dollars more effectively. An example could be yellow school bus services and public transit services that often serve a similar market.

**Performance Management:** PB researcher Lauren Isaac began the discussion by defining what performance management is, how it links to goals and how states use performance management in planning, operational, and funding decisions. She noted that there are differences between the ways a state might use performance management versus how transit agencies choose to monitor performance. She highlighted Washington State's transportation goals, which include:

- Economic Vitality
- Preservation
- Safety
- Mobility
- Environment
- Stewardship

Washington reports its performance management in the “Gray Notebook,” Transit Development Plans (TDPs), and the Summary of Public Transportation. This discussion was followed by a presentation from Jim Jacobsen of King County Metro on how King County Metro monitors performance and why.

Comments focused on the need to develop metrics that could be comparable across the state and integrated with the rest of the state. Some concepts proposed included amount of service per capita; amount of service per riders served; or asset utilization.

### **Range of State Roles**

As an introduction to the next workshop, Jeff Morales, Senior PB Advisor, gave an overview of what other states are doing in terms of involvement in public transportation. He reviewed the levels of involvement of a number of states in public transportation including: Maryland, Virginia, and Texas. This provided a spectrum of possible state involvement levels that range from limited involvement in Texas to very active and direct in Maryland.

### **Comment and Follow-up**

The panel had an opportunity to voice additional comments and questions after the presentations. There was a comment regarding a possible difference between what is “needed” versus “wanted” to meet public transportation goals. This generated an additional comment that the state is also in the same financial situation of reduced revenues due to the recession and the lack of “deep pockets” to meet all needs.

There was a general observation that there should be some serious review to assess the ability for public transportation to address state policies.

There was some question regarding the public perception of the need for public transportation and that there may be more education necessary to really emphasize the role public transportation plays in the overall state network. This generated a comment that when looking at that picture that some elements and measures will not apply to all agencies and the local options should be allowed.

Finally, there were clarifying questions regarding the process moving forward.

- Will the state provide direction on goals or will the panel have some input? The panel’s role is to suggest possible goals that fit within the overall state transportation framework. It was reiterated that it is not the goal for the panel to agree on all aspects of the suggestions given to the state. We will strive to reach agreement where possible, but the primary goal is to gain input on the things the state should take into consideration as it discusses its future role.
- What is the ability to engage the public? Future meetings will include a public comment period.

Meeting was adjourned after a short discussion on the possible dates for the next workshop.

## Meeting Summary

### JTC State Role in Public Transportation Public Transportation Advisory Panel – Workshop #2

Friday, August 6, 2010

10:00 a.m. – 3:00 p.m.

Sound Transit Union Station – Ruth Fisher Board Room

#### In attendance:

- Senator Mary Margaret Haugen, Senate Transportation Committee Chair
- Representative Judy Clibborn, House Transportation Committee Chair
- Senator Brian Hatfield, District 19
- Senator Curtis King, District 14
- Representative Jim Moeller, District 49
- Representative Marko Liias, District 21
- Representative Terry Nealey, District 16
- Katy Taylor, WSDOT
- Kelly Scalf, Rural Resources
- Levi Wilhelmsen, rider
- Richard DeRock, Link Transit
- Jim Jacobson, King County Metro Transit (alternate)
- Martha Rose, Island Transit
- Joni Earl, Sound Transit
- Page Scott, Yakima Conference of Governments
- Charlie Howard, Puget Sound Regional Council
- Rick Benner, Western Washington University
- Jim Stanton, Microsoft
- Ted Horobiowski, Avista Corp.
- Virginia McIntyre, League of Women Voters
- Karen Stites, Amalgamated Transit Union, 1765
- Alice Tawresey, former Transportation Commissioner
- Gladys Gillis, Starline Luxury Coaches
- Tom Jones, Consultant

#### Not in attendance:

- Senator Dan Swecker, District 20
- Representative Mike Armstrong, District 12
- Hans Van Someren Greve, Stemilt Growers
- Chuck Ayers, Cascade Bicycle Club
- Dave O’Connell, Mason County Transit

The second workshop with the Joint Transportation Committee (JTC) Public Transportation Advisory Panel was held on August 6, 2010. The workshop was attended by 23 of the Advisory Panel members. The Parsons Brinckerhoff team, led by Sheila Dezarn and Barbara Gilliland, introduced the agenda for the workshop and turned the floor over to Bill Millar, President of the American Public Transportation Association.

### Federal Perspective from Bill Millar, APTA President

Bill Millar began his presentation by reminding the audience that Washington is not the only state with funding issues. Many agencies are facing critical concerns related to funding ongoing operations. He offered a number of statistics to frame the Panel’s discussion related to public transit:

- 84% of transit agencies across the country have implemented some sort of service cut, layoffs and/or fare increase to address declining revenues.
- 58% of those who use transit do it for work; 11% use transit for education/training



- Public transportation is the only form of transportation that is a net saver on carbon consumption.

He also noted some of the issues that the federal government is considering. They are also trying to reconcile funding realities and the ongoing funding dilemmas. There are pressures to look at the transportation network and address system pressures through increased intermodalism and serving basic mobility needs. They are considering how to measure performance and develop strategic goals. Issues similar to the questions this study is considering.

He noted that Washington's funding participation in public transit is limited and that its focus has been on distributing the dollars to meet special needs transportation. However, he noted the progressing programs such as the Commute Trip Reduction (CTR) program and Washington's transit agencies ability to attract formula and grant dollars. Mr. Millar suggested Washington offer matching funds for federal money to help guide the best choice of projects. Focus on making sure there is new investment instead of reallocated funds.

Finally, Mr. Millar noted that Washington has done a good job focusing on economy, environment, and education.

Comments from the panel included Representative Clibborn noting that that Washington helps to fund transportation by allowing RTAs to levy local option taxes. Representative Moeller also commented that there is a difference between investments and financing. He suggested that more financing options should be explored to expand the use of existing funds and develop new user pay funding sources.

## Introduction

Deputy Project Manager Barbara Gilliland reviewed the primary purpose for this study – to identify the state role in public transportation and develop a statewide blueprint for public transportation to guide state investments. "Investment" was defined as funding and related to *how* the state invests time and resources.

Barbara reviewed the themes that came out of the interviews with individual panel members. Four overarching themes came out during her discussions regarding the key areas where the panel should focus:

- One size does not fit all – need a mix of strategies, goals, roles, and programs
- Focus on the big picture – emphasize multimodal and connective services
- Meeting state goals – reduce barriers to cost effectiveness and address urban and rural issues
- Funding – focus on sustainability, coordination, and funding flexibility

Barbara discussed the questions Workshop #2 was aimed to answer, centering on the idea of "What should be the state's role in public transportation?"

- Are there current roles that should be reduced or eliminated?
- Are there current roles that should be enhanced or expanded?
- Should the state take on new roles?

## Current State Role in Public Transportation

Project Manager Sheila Dezarn provided a preview of key findings, discussing how the state plays a range of roles and a spectrum of functions including:

- An active role in setting a broad policy framework and developing a comprehensive statewide transportation plan
- A significant role in directly funding and operating two major systems – the Washington State Ferries and HOV system
- Primarily a policy role for public transit agencies – authorizing their formation and local funding options
- A relatively small role in direct funding for public transit agencies
- A broad coordination and oversight role that reflects level of state involvement

Sheila gave an overview of current state roles, broadly summarized as the following:

- *Policy & Planning:* WTP 2030 establishes a broad policy framework. Six state goals are established that drive investment decisions.
- *Direct Involvement:* The state funds, operates and manages the Washington State Ferries and the High Occupancy Vehicle system. The state also has a role in the Amtrak Cascades, Travel Washington, and the park-and-ride system. Intercity connectivity receives a significant contribution.
- *Funding:* There is significant state investment in ferries, HOV system, and intercity passenger rail. A multimodal account funds a variety of public transportation services.
- *Oversight & Coordination:* The requirement of TDPs and the Gray Notebook provide statistics and performance reports. The WSDOT Public Transportation Division plays a broad, comprehensive role.

## Existing WSDOT Roles – Katy Taylor, WSDOT

Katy Taylor noted that WSDOT runs a number of programs: CTR, GTEC, vanpool, regional mobility grants, park-and-rides, and Travel Washington (intercity bus). WSDOT also provides resources and assistance in the form of grants.

Katy's presentation prompted a number of discussions from the Panel. Representative Moeller asked about WSDOT's greatest challenges. Katy responded that they are the following:

- Adding service to take over cut Greyhound routes
- Efficiency in the delivery of the special needs programs
- Taking a holistic approach to embracing all modes and intermodal opportunities
- High degree of coordination with public transportation providers as well as MPO's.

Senator Haugen commented that the state is criticized for not investing money in public transportation, but we must consider investment in all forms of public transportation and special programs.

Joni Earl asked how the WSDOT Public Transportation Division works with the rail division of WSDOT. Katy answered that there are common touch points where they coordinate. The Panel has the ability to rethink how the DOT is organized and coordinated. Changes could be considered as a part of the process an example could include moving the bicycle/pedestrian department to within Public Transportation.

## Break-out Sessions

Two break-out sessions occurred to help frame the Panel's thoughts on the state's current and future role. The first break-out session answered the following questions:

- Are existing state public transportation resources and funding focused on the right issues and priorities?
- Do the current roles address the state's emerging and/or unmet needs?
- Do the current activities support statewide transportation system policy goals as established by the Washington State Legislature?

The second break-out session answered the following questions:

- Are there existing state roles that should be reduced or eliminated?
- Are there existing state roles that should be enhanced or expanded?
- Are there new roles that should be added?

The following summarizes the voting around the future state role areas. The top 5 vote receivers, listed in order included:

1. Reduce silos (consolidate grant competitors and budgets)
2. Provide more flexibility in state programs (e.g. 18<sup>th</sup> amendment)
3. Align reporting/planning of schedules
4. Streamline regulations
5. Take year-to-year unreliability out of funding

A summary of the specific comments related to these five areas is provided after the table attached. Also included are the detailed responses from each group for both breakout sessions.

## State Peer Review Highlights

Prior to the break-out session debrief, Sheila gave a short presentation to inform the Panel of the highlights of the state peer review. The states reviewed were Texas, Florida, Tennessee, California, Pennsylvania, Maryland, and New Jersey. Highlights included:

- *Policy & Planning*: Most states require some form of TDP.
- *Direct Involvement and Funding*: States vary from states that have a very active engagement in the provision of public transportation such as New Jersey and Maryland whom directly operate and fund public transportation. Other states such as Tennessee and Texas have very limited roles.
- *Oversight & Coordination*: All interviewees emphasized the role of the state in coordinating with and among public transportation agencies. Incentives for sustainability and transportation/land use coordination are starting to play a growing role.

## Comments and Adjourn

The general sentiment during and after the break-out sessions was positive. The panel discussed key observations and learning from the break-out sessions these included the following:

- Many members noted new information that they hadn't understood before:

- There are many parts of state government that impact public transit providers (Earl)
- Better understanding of the public transportation division responsibilities (Representative Liias)
- Laws/statutory issues that affect provision of services (Wilhelmsen)
- It was noted that the “silo” story is a difficult one to address (DeRock)
  - Run into unintended consequences of policy decisions, achieving GMA results when service is being cut because of funding issues.
  - That coordination has a cost
  - There is a huge gap in funding needed to continue current service. The state needs more revenue as well as greater efficiency
  - Eliminating silos is easier said than done. For example, GMA can be in direct conflict with providing rural transportation (Tom)
- Coordination is happening and does work. However, it doesn’t necessarily save money due to the need to serve more destinations.
- Some Panel members expressed that growth management and land use ideas have potential.
- Senator Haugen noted that we need to consider those who represent social and health services. These priorities may not be the same across the state. Accessibility costs are high but are a key community service for transit-dependent populations. DeRock added that access and costs for providing service for disabled and transit dependent populations needs to be reexamined.
- Transportation must be more customer “centric” and focus on time, cost and quality (Gillis). Are we funding the right things that promote efficiency? Stanton highlighted things can be learned from the private example and how they are working. It is a clearing house for good information as well as serving different markets.
- Policy decisions are just as important as funding decisions. We need to develop a step by step process/framework on how improvements are implemented over different time horizons. This will allow for flexibility to alter approaches depending on funding availability (Moeller). Clibborn added that it will be important to look outside silo’s for options as within. However, other noted that how far should we go in consideration of new sources? (King)

The floor was opened to public comment, of which there were none. |

Representative Liias made a recommendation that all members try to use the public transportation system to get to the next meeting. Sound Transit CEO, Joni Earl offered to do trip planning for members to the next meeting.

The meeting adjourned after confirmation of the final two meeting dates, times and locations:

- **Workshop #3** September 29<sup>th</sup> at the Puget Sound Regional Council from 10-3.
- **Briefing #4** October 27<sup>th</sup> at Sound Transit from 10-1.

## Summary of Breakout Session 2 Voting The State Future Role

### Change Suggestions Voting Summary Table

Change Suggestion	Group 1 Votes	Group 2 Votes	Group 3 Votes	Total Votes
<b>Added/New</b>				
Consider economic vitality along with population centers		●	●●	3
Require school and human services to track transportation costs	●●			2
Add “whole system” multimodal planning	●	●	●●●	5
Expand coordination roles	●			1
Award grants for TOD and modal coordination	●		●	2
Expand PPP at major transit hubs		●		1
New transportation facility siting	●	●●		3
<b>Enhanced/Expanded</b>				
Consider net financial benefit of decisions	●		●●●●	5
Expand vanpool eligibility	●●	●●		4
Take year-to-year unreliability out of funding	●●●●	●●●	●	8
Prioritize “economic vitality” as a goal	●		●●●●	5
Better coordination with DSHS and GTECs	●	●		2
Statutory flexibility and guidance		●	●	2
Award state dollars and incentives to improve interconnectivity		●●●●	●	5
Add more parking			●	1
Prioritize performance measures being tied to state goals	●●●	●●	●●	7
Provide more flexibility in state programs (e.g. 18 <sup>th</sup> amendment)	●●●●	●●●●●●	●	11
Streamline regulations	●●●●	●●●●	●	9
Private provision of transit services	●●●			3
<b>Reduced/Eliminated</b>				
Reduce silos (consolidate grant competitors and budgets)	●●●●●●	●●●	●●●●●● ●●●●●●	19
Reduce counterproductive taxing strategies	●●	●	●	4
Align reporting/planning of schedules	●●●●	●●●●●●	●●	11

**Group 1: Policy Makers and Planners**

**Group 2: Public Transportation Providers**

**Group 3: Public Transportation Users**

The next page summarizes the specific comments mentioned related to the top 5 vote categories. All comments and suggestions received for breakout sessions 1 and 2 are recorded below.

## Summary of Top Vote Categories with Comments

- Reduce silos (consolidate grant competitors and budgets) – Top total votes; Top vote receiver for Group 1 (Policy Makers/Planners) & Group 3 (Public Transportation Users)
  - Expanded coordination role – with incentives
  - Grants for TOD and modal coordination
  - State seed would leverage federal dollars
  - Need for the state to assist with interconnectivity within different taxing authorities
  - Can we make some grant-funded changes without money?
  - Should cross-pollinate across agencies by mode (bus and rail) and jurisdiction
  - Consider looking at all the dollars in one pool, and decide how best to spend
  
- Provide more flexibility in state programs (e.g. 18<sup>th</sup> amendment) – Top votes for Group 2 (Transit Providers)
  - Airspace lease
  - Use of park-and-rides
  - Deadheading by private operators
  - Space usage on highways, etc. (Advertisements on park-and-rides, fees for pullouts)
  
- Align reporting/planning of schedules (favored by Groups 1 and 2)
  - State and federal requirement should overlap more efficiently
  - Need for holistic data to allow holistic discussions
  - TDPs are only for transit systems, but could be required for other transportation providers
  - Gray Notebook may be too detailed
  - Biennial reporting instead of annual?
  - Rural services/WTP updates are out of sequence
  
- Streamline regulations (favored by Groups 1 and 2)
  - Review to adjust and align regulations to achieve state goals
  
- Take year-to-year unreliability out of funding
  - Buses and ferries often get cut and capital therefore isn't invested
  - Define the baseline level of service
  - Tie funding to performance measures and best practices
  - Tie funding to state goals
  - State must continue to fund rural and special services transportations
  - Level of current funding is not in line with the state's transportation goals
  - Note that funding sources can be state, local, federal, or from transit agencies (much of the infrastructure funding for state projects comes from Sound Transit or other transit agencies)

- Transit funding balance between congestion and special needs
- State dollars should be better focused – not spread

## **Detailed Summary of Breakout of Session 1**

### **Group 1 – Policy Makers and Planners**

#### *Policy/Planning*

- Focused on trip not mode
- Focus on potential for greatest improvement

#### *Service Provision*

- Coordinate with private sector and other agencies
- Go where greatest impact

#### *Funding*

- All dollars in one pool to finance biggest bang for buck
- Seed money to leverage investment
- Maximize system performance regardless of mode
- Transits aren't using 0.3% POF
- State dollars should be better focused – not spread
- Financial incentives should drive grater match
- Need non-financial incentives
  - GMA
  - Require connectivity planning
  - Remove barriers to private services

#### *Oversight/Coordination*

- Has WTP/TDPs accomplished measureable performance?
- Eliminate local and lode silos (ferry system transit, rail, emergency response)
- Consider outsourcing (operations, capital, planning)
- Consider improvements in one mode to benefit other mode

### **Group 2 – Public Transportation Providers**

#### *Policy/Planning*

- Be advocates for PT
- Human services are underrepresented, need to raise profile
- Rural services/WTP updates are out of sequence
- Medicare transportation planning needs integration
- Note that funding sources can be state, local, federal, or from transit agencies
  - Some state funding doesn't come out of PT budget
- Much of the infrastructure funding for state projects comes from Sound Transit or other transit agencies
- Programs that further CTR-type programs provide benefits

- Be mindful of the interrelated roles of state departments and their effects on PT decisions/policies
- Reliable funding doesn't exist for PT
- Need for coordination between other organizations' policy decisions and effects on transportation providers
  - i.e. Community college transportation and adult day care
- What is the minimum requirement for transportation mandated by the state?

### *Service Provision*

#### Space usage on highways, etc.

- Space and pullouts require potentially unnecessary fees
- Advertisements on park-and-rides
- Clarification on highway purpose
- Consistency
- Broadening interpretations
- Connectivity between urban and rural service
  - Intercity bus helps, but how much?
  - Includes charter services, special needs, DSHS, veterans
  - Build on benefits of intermodal connections, especially with private providers
- Need for the state to assist with interconnectivity within different taxing authorities
- Better off-peak access to public facilities
  - Creates the need for private providers
  - Need to utilize transit-only lanes and transit zones for off-peak provision of private transportation
  - May be a local partnering solution

### *Funding*

- Need an appropriate role for state funding
  - Identify a stable source for transit
- State must continue to fund rural and special services transportations
  - Rural services require less funds comparatively
- Free walk-on ferry service
- Level of current funding is not in line with the state's transportation goals
- Awards of grant funding may not be allocated efficiently
  - Can we make some grant-funded changes without money?
- Can the state charge for parking in a park-and-ride lot
  - Overall question of allowing local agencies to run park-and-rides with more autonomy

### *Oversight/Coordination*

- Schedules for TDPs, NTD data are not coordinated
  - Results are helpful
  - State and federal requirement should overlap more efficiently
  - TDPs are only for transit systems, but could be required for other transportation providers
  - Need for holistic data to allow holistic discussions
  - Data collection



- Multiple audits
- Gray Notebook may be too detailed
- Need for tie-in between performance measures and funding
- Biennial reporting instead of annual?
- ACCT requirement must be reviewed for intent

### Group 3 – Public Transportation Users

- Should WSF be
  - locally and regionally controlled
  - outsourced to private sector
- Emergency response key role for ferries, e.g. 9/11
- Transit authorities have 0.3% authority for passenger ferries
- Policy/planning are siloed – should cross-pollinate across agencies by mode (bus and rail) and jurisdiction
- Not enough coordination among services – train, bus, ferry. Focus on the trip rather than the mode
- What is real effect of
  - WTP
  - TDPs?
  - What are the measureable effects?
- What performance measures and marketing forces drive funded programs?
- Limited dollars drive program focus
- Consider looking at all the dollars in one pool, and decide how best to spend (too many silos)
- Erosion of state investment
  - CTR \$1/\$18
- CTR/HOV = dollars well-spent
- Need more seed money that draws partnership investments
- Target state CTR dollars to smaller/medium basis who can't afford to partner. Microsoft doesn't need it
- State's PT investment is tiny for most entities
- State needs carrots/sticks to drive local coordination and connectivity
- Incentives from state
  - Remove barriers to private providers expanding service to non-employees (Microsoft)
  - Dollars to improve connectivity
  - Require connectivity analysis by local transit agencies to force/encourage connectivity
- Polices to encourage TOD
- State highway design should include queue-jumping and other ways to increase transit ridership
- Colleges/universities need dollars to help finance park-and-rides, bus service. Not getting enough for current state/local programs. State dollars are too peanut-buttered – should be more focused

### Summary from Group 3

#### *Right priorities now*

- Policy framework is in place (vs. funding)
- Hard to measure success of this effort

- Tighter linkage between goals and dollars
- Using cost measures more effectively
- State role to provide basic mobility statewide?
- Better alignment of transportation and other policies (e.g. GHG, education, health, etc.)
  - Coordination of transportation and other budgets
- Tolling projects/transit capacity
  - Social equity

#### *Unmet and emerging needs*

- Aging demographics requires shifts in policies and funding
- Transit funding balance between congestion and special needs
- Coordinated services
  - Perhaps requires funding
  - Link new funds as incentives
  - Reward connectivity
- Linking state assistance to GMA
  - To support TOD
  - Local policies/actions
- Military – coordinate development

#### *To improve*

- More efficiency/coordination in service delivery
- Duplication of
  - Services
  - Facilities (maintenance bases, etc.)

## **Detailed Summary of Breakout Session 2**

### **Group 1**

#### *Added/New*

- Public transit in concurrence and GMA link local actions to transit service
- Prioritize performance measurement and reporting – best practices (see TCRP report)
  - Votes: G1-3, G2-1, G3-2 (one G1 yellow)
- Ultimately – tie funding to performance measures and best practices – tie to state goals (e.g. connectivity across regions)
- Review and set priorities
- WTP – short as well as long-term priorities – more emphasis on public transportation

#### *Enhanced/Expanded*

- Mechanism for innovation funding
  - E.g. WWU parking
  - Broaden the tent
  - Recognize multi-year funding
  - Cost effectiveness
  - Performance measures
- Provide more flexibility in state rules/programs to help leverage more resources (e.g. 18<sup>th</sup> amendment flexibility and gifts of public funds) to achieve state goals

- Votes: G1-4, G2-6, G3-1 (two G1s, and four G2s, and 1 G3 are green)
- Livable communities approach (across agency – DOT/commerce/eco/etc.)
- Regulatory streamlining
  - Review to adjust and align regulations to achieve state goals
  - Less constraining
  - Votes: G1-4, G2-4, G3-1 (one G1 red and one G2 green)
- Private provision of transit services
  - Votes: G1-3
- Advocacy and education role on all transportation programs and opportunities across agencies (and inventory of all policies that affect public transportation)

#### *Reduced/Eliminated*

- Need new transportation facility siting
  - Process – streamline process for faster delivery – essential public facilities
  - Votes: G1-1, G2-2
- Less frequent reporting, align reporting/planning of schedules
  - Votes: G1-4, G2-5
- State-level planning JTC study

#### **Group 2**

#### *Added/New*

- State dollars for transit operations – targeted at state highways
- Expanded coordination role – incentives
  - Votes: G1-1 (yellow)
- Grants for TOD
  - State seed would leverage federal dollars
  - Votes: G1-1
- State develop better interlocal agreements for transit “modal agreements”
- Grants for modal coordination
  - Mode
  - Public/private
  - Votes: G3-1
- Expand PPP at major transit hubs
  - Need different strategies to reduce barriers
  - Require living wage jobs
  - Votes: G2-1
- Feet and bike access
  - Focus on state facilities
- PPP as revenue generator
  - Votes: G1-1
- Parking in pools with private sector – use church parking lots, for example
- Focus on whole trip regardless of mode – “Get me from point A to point B quickly”
  - Votes: G3-2 (one is yellow)

#### *Enhanced/Expanded*

- Better coordinate with DSHS, commerce – telework, GTECs

- Votes: G2-1
- Statutory flexibility and guidance
  - Votes: G3-1
- State dollars to improve connectivity among systems and modes
  - Within existing dollars by different weighting of priorities
  - Votes: G2-3 (all green)
- Forcing coordination among systems
  - Votes: G2-1, G3-1
- CTR & GTEC
  - Votes: G1-1
- More parking – multimodal includes cars
  - Votes: G3-1
- Target performance measures to state goals
  - Votes: G2-1
- Audits and performance measures at finish HOV system
- Finish HOV system

#### *Reduce/Eliminate*

- Reporting coordination should be improved – statutory review
  - Votes: G3-2 (one is yellow)
- Silos – admin barriers among modes
  - Votes: G1-1, G2-2
- Budgetary silos to gain flexibility
  - Votes: G1-1, G3-1
- State management/ownership of local facilities
- Contract out park-and-ride development
- Statutory barriers to coordination/service provision
  - Air space leases
  - Votes: G2-1
- Narrow interpretation of state law
  - Airspace lease
  - Use of park-and-rides
  - Deadheading by private operators

#### **Group 3 -**

#### *Added/New*

- Restructuring to reduce silos and competition
  - Votes: G1-2, G2-1, G3-4
- Consider economic vitality as well as population centers
  - Votes: G2-1, G3-2
- Requiring schools and human services to track transportation costs
  - Votes: G1-2
- Understand GHG requirements
  - Make goals achievable
- Allow for grant requests that aid smaller bidders and new projects
- Add “whole system” planning/more resources

- Highways need to be considered in concurrence with transit
  - Votes: G2-1, G3-1
- Use employer tax break as a CTR incentive

#### *Enhanced/Expanded*

- Consider an impacts analysis (net financial benefit)
  - Total cost outside of just transportation considerations
  - Votes: G3-2
- Expand vanpool eligibility
  - Votes: G1-2, G2-2
- Expand what we measure to increase efficiency
  - The right measures (define what we measure)
  - Measure performance
- Take unreliability out of funding (“up and down”)
  - Buses and ferries often get cut and capital therefore isn’t invested
  - Define the baseline services
  - Votes: G1-4, G2-3, G3-1 (one G1 and one G2 are green)
- Examine priorities and increase “economic vitality” as a goal
  - Votes: G1-1, G3-4

#### *Reduced/Eliminated*

- Reduced silos → Consolidate grant competitors
  - Votes: G1-2, G2-1, G3-5
- Rural transit service
- Only make cuts after considering a cost-benefit analysis and efficiency on state goals
  - Votes: G1-1, G3-3
- Reduce counterproductive taxing strategies, i.e. VMT.CTR programs funded with gas tax
  - Votes: G1-2, G2-1, G3-1

## Meeting Summary

### JTC State Role in Public Transportation Public Transportation Advisory Panel – Workshop #3

**Wednesday, September 29, 2010**  
**10:00 a.m. – 4:00 p.m.**  
**Puget Sound Regional Council**

#### **In attendance:**

- Senator Mary Margaret Haugen, Senate Transportation Committee Chair
- Representative Judy Clibborn, House Transportation Committee Chair
- Senator Brian Hatfield, District 19
- Senator Curtis King, District 14
- Senator Dan Swecker, District 20
- Representative Jim Moeller, District 49
- Representative Marko Liias, District 21
- Katy Taylor, WSDOT
- Kelly Scalf, Rural Resources
- Levi Wilhelmsen, rider
- Richard DeRock, Link Transit
- Kevin Desmond, King County Metro Transit
- Dave O’Connell, Mason County Transit
- Martha Rose, Island Transit
- Charlie Howard, Puget Sound Regional Council
- Rick Benner, Western Washington University

- Chuck Ayers, Cascade Bicycle Club
- Jim Stanton, Microsoft
- Ted Horobiowski, Avista Corporation
- Virginia McIntyre, League of Women Voters
- Alice Tawresey, former Transportation Commissioner
- Gladys Gillis, Starline Luxury Coaches
- Tom Jones, Consultant

#### **Not in attendance:**

- Representative Mike Armstrong, District 12
- Representative Terry Nealey, District 16
- Joni Earl, Sound Transit
- Karen Stites, Amalgamated Transit Union, 1765
- Page Scott, Yakima Conference of Governments
- Hans Van Someren Greve, Stemilt Growers

The third workshop with the Joint Transportation Committee (JTC) Public Transportation Advisory Panel was held on September 29, 2010. The workshop was attended by 23 of the Advisory Panel members. The Parsons Brinckerhoff team, led by Sheila Dezarn and Barbara Gilliland, introduced the agenda for the workshop. Before beginning the workshop, the members discussed their experiences using public transportation to get to the meeting.

### **Getting to the Meeting**

During Workshop #2, Representative Liias suggested that members try to use the public transportation system to get to the next meeting. Sound Transit CEO Joni Earl offered to do trip planning for Panel members. Comments on their trips included:

- Dave O’Connell took a Mason County Transit bus to a WSDOT Ferry. Connections worked well and it was easy to walk to the meeting.
- Richard DeRock found it too inconvenient to use his itinerary due to multi-modal connections adding to the total travel time – he would have had to leave the day before to make it to the workshop on time.
- Representative Clibborn couldn’t take the first bus in her itinerary due to the lack of a crosswalk to get to the bus stop. This experience has prompted her to follow up on access to the stop.
- Katy Taylor drove in a carpool and bussed.
- Gladys Gillis took a bus.
- Martha Rose took Island Transit to a WSDOT ferry, and finally rode in a rideshare.
- Senator Hatfield had been staying at a hotel at the airport and took the Sound Transit Link Light Rail to the workshop. He noted a flaw that there is no designated space for luggage on Link.
- Representative Liias took a train and then walked.
- Virginia McIntyre had no transit options, but drove most of the way and then walked.

## State Role in Public Transportation

Project Manager Sheila Dezarn reviewed the discussions from Workshop #2. Three questions were asked as part of the breakout sessions in Workshop #2:

- Are there current roles that should be reduced or eliminated?
- Are there current roles that should be enhanced or expanded?
- Should the state take on new roles?

Based on the Panel’s comments during breakout session in Workshop #2, it was noted that the Panel did not recommend adding new state roles or eliminating current roles; instead, emphasis was placed on seeking better alignment and predictability in funding and greater flexibility both in the state role and on funding issues. Representative Liias pointed out that, based on the results from Workshop #2, transportation users and providers appear to have different priorities.

Five major suggestions were identified. Sheila Dezarn reviewed each area and solicited additional clarification from the Panel members.

### 1. Reduce silos

- State could expand its coordination role
- State could assist with interconnectivity
- State grants could focus on coordination between modes or support transit-oriented development
- State could pool dollars more and decide how best to spend those dollars
- State could help leverage federal dollars

### 2. Streamline regulations

- Review to adjust and align regulations to achieve state goals

### 3. Provide more flexibility in state programs

- Use of park and ride facilities for private operators
- Deadheading in HOV lanes by private operators

- Airspace leases
- Use of space on state highways (fees, advertisements)

### Comments

*Regarding the use of space on state highways* – The state currently imposes fees for improvements such as constructing transit shelters on the state’s right of way. Shelter advertisement fees must go to the state’s general fund instead of being earmarked for maintenance of the shelter or for meeting other public transportation needs.

- Judy Clibborn questioned if the general fund requirement is linked to federal highway funding instead of being a state issue. Richard DeRock answered that it is only a state issue. Katy Taylor suggested that there has been inconsistent past application of the law and there is a need for better coordination between different divisions within WSDOT.
- Senator Haugen suggested there is an opportunity to generate much greater revenue from advertising. There was additional discussion regarding revenue generating options related to park and ride usage; however either there are restrictions or lack of guidance on the conditions for use.

*Regarding the permitting and transit related decision making processes* – Senator Haugen noted that it appears that all actions require Olympia resolution or action. She suggested that more decisions need to be pushed to the regional level. Senator Swecker suggested that a more programmatic approach should be designed for guidance to clarify objectives. Several members noted long decision processes that are slowing project implementation: Jim Stanton noted that Microsoft wants to expand a ramp on a state highway and pay for it, but the permitting process is very complicated. Martha Rose said that she needs a permit for one shelter in Stanwood but it has been held up for 2 years.

*Relating to access to public transportation services* – Kelly Scalf commented that often decisions are made without considering how it affects peoples’ ability to access services. She cited an example where local street parking was converted from parallel (easy for access for persons with disabilities, in wheelchairs, etc.) to pull-in angle parking (hindering access). There was a general discussion about how this also drives costs related to paratransit services and in general affects both capital and health costs. Chuck Ayers commented that every transit trip is a pedestrian trip. Pedestrian issues need to be considered.

#### 4. Align reporting/planning of schedules

- State and federal reporting requirements should overlap for more efficiency
- Biennial reporting instead of annual
- Transit Development Plans could be required for other providers
- Washington Transportation Plan update and rural services out of sequence
- Gray Notebook may be too detailed
- Need for holistic data to allow holistic discussions
- Regarding alignment of reporting, Senator Haugen suggested a “light” version of the Gray Notebook that adds transit information.

### Comments

*Regarding the need for holistic data to allow holistic discussions* – Richard DeRock suggested the need to look at measures on a broader level, not at too detailed a level. Representative Llias suggested that there need to be clear outcomes we are trying to measure against.



*Regarding the suggestion for biennial reporting* – Richard DeRock noted that there is not agreement among transit members on the Panel on the question of annual versus biennial reporting. The data needs to be reported to the NTD annually anyway, and providers would prefer to use data that is recent.

#### 5. **Take year-to-year unreliability out of funding**

- Define the baseline level of service
- State must continue to fund rural/special services
- Transit funding balance between congestion and special needs
- Tie funding to state goals
- Level of funding is not in line with state’s transportation goals
- Tie funding to performance measures/best practices
- State dollars should be better focused (not spread)

#### **Comments**

*Regarding a transit funding balance between congestion and special needs transportation* – There needs to be a trade-off between providing access or maintaining performance.

- Kelly Scalf suggested a basic level of transportation across the state is important. Charlie Howard said there is an issue of the growing costs of ADA service that eclipses fixed route service when budgets are stagnant. Katy Taylor said she agrees that paratransit is ripe for change with full integration into DOT, adding capacity and managing demand.
- Chuck Ayers said there are unintended consequences of park and rides. Funding levels need to be more flexible to address human health and congestion issues by encouraging more walking and bicycling as access to the public transportation system.

Representative Clibborn also noted that it is difficult to track where savings occur. Often the dollars end up in different locations during the budget process.

The discussion concluded with Kevin Desmond posing the question on how this process might result in a more multi-modal approach to assessing the state’s transportation investments. Representative Liias added that while the discussion generally focused on enhancements or relatively modest modifications to the state’s role, there is a desire to approach things in a different way. In particular, there is interest in moving away from the “silo” mentality.

#### **Defining Unmet Needs**

Larry Sauve provided a short presentation on findings resulting from the research conducted on unmet needs, current challenges and emerging trends. It was noted that unmet needs is a broad term and are not consistently defined or comprehensively described or reported in any document. For purposes of this research, unmet needs were broadly defined as:

- Services or facilities as identified by individual provider policy boards or agencies which could not be provided
- Needs associated with the current recession, where services are being reduced
- Deferrals of system expansion plans also associated with the recession
- Needs identified in various forums or reports (e.g., connectivity) but not systematically documented

Several members noted that the existence of a gap between desired and available service doesn't automatically constitute a "need."

An overview of the public transportation available in the state was provided and the constraints caused by reductions in current public transportation revenues. Outside of revenue constraints, the following service coordination unmet needs were identified:

- Intermodal connections at state ferry terminals
- Connections between modes and systems
- Public information about specialized services that are available

In conclusion, a number of emerging trends and implications for public transportation were discussed.

- *Emerging Trends*
  - Growing demand for public transportation services as population and employment continue to grow
  - Aging population, growing at a faster rate in rural counties
  - Shifts to public transportation due to climate change initiatives and pricing initiatives (e.g., tolling)
  - Continued funding limits and uncertainties
- *Implications for Public Transportation*
  - Higher potential demand at a time of fiscal challenges
  - Prioritization of resources to maximize results

## Transit Provider Perspectives

Kevin Desmond, Richard DeRock, and Dave O'Connell made a presentation that provided background and metrics on transit's role in addressing state goals. Each of the six state goals was presented with examples of transit's efforts to fulfill each goal. Transit's partnerships with the state were also highlighted and a point was emphasized that another goal the state might want to consider is access. Access to transit is a key element for making the system effective.

The presentation spurred a number of comments from Panel members.

- Senator King reminded the Panel of the importance of moving goods from Eastern Washington to Western Washington. The current efforts of stopping slides along I-90 help, however tolling SR-520, and modifying the Mercer Island area of the I-90 bridge to accommodate light rail will impact the capacity available on this corridor. Richard DeRock noted that the I-90 bridge and mountain pass are the biggest points of congestion for travelers to Wenatchee.
- Kelly Scalf pointed out that national healthcare reform will increase the number of non-emergency medical trips and increase demand for specialized services.
- Katy Taylor asked what state role would be most beneficial to transit? Responses included efforts to increase transit speed and reliability, such as using transit signal priority, incentives to improve access to transit and the creation of more predictable and stable funding resources.
- There was much discussion about how technology can also be a useful tool. Transit agencies have information that could be used to improve communication and knowledge of passenger flows. However, transit agency representatives noted that the costs for these types of improvements can

be very high. There was some discussion about the role of the public versus the private sector in this area.

- Tom Jones cautioned about being overly optimistic about the state's ability to take on too many, if any, new issues or programs.

### Revised State Role and Unmet Needs

A chart containing the summary from Workshop #2 augmented with additional information from the research on unmet needs was posted at the back of the room. Panel members were asked to vote for their top two priorities for state focus. The top areas included:

- Funding –
  - Public transit revenues declining (4 votes)
  - Funding – Improve funding reliability (6 votes)
  - Funding – Provide more flexibility in state programs (5 votes)
- Service Provision – Need for improved connections between modes, including bus, commuter rail/light rail, ferries and non-motorized (5 votes)
- Policy/Planning – Streamline regulations (5 votes)

### Performance Measures

Eric Roecks presented an overview of how a performance management framework works and introduced the six performance measurement principles, which are that measures should be:

- Linked to goals
- Accepted by stakeholders
- Actionable
- Credible
- Timely, and that there should be
- An appropriate number of measures

It was noted that there is a distinction between performance *measures* versus *metrics* – with measures being broader concepts (*what* do we want to measure), while metrics are the actual calculations, ratios, or percentages (*how* we measure). For this discussion, we were focused on measures.

The group was shown a list of performance measures that could potentially be linked to each of the six state goals and asked to discuss the measures that would provide a good barometer on how the public transportation network is performing.

Major areas of emphasis that much of the group agreed on are as follows. It was noted that in general the Panel agreed that they believe there should be fewer measures and that some measures could serve more than one goal.

Although the panel spent time talking about each goal and suggested some key measures that would be good for each, the majority of the time focused on measures relating to the Mobility and Stewardship goals. At the end of the discussion many members agreed that in addition to these key areas that measures related to economic vitality were also important. The following summarizes the key elements members recommended focusing on:

Mobility – the discussion revolved around access to services and in, the urban areas, addressing congestion.

- Congestion mitigation and chokepoint relief
- Access to the public transportation system
- Connectivity
- Consumption of service – ridership measures

Stewardship – a lot of this discussion focused on getting to the right measures for cost, efficiency and effectiveness. However, it was noted that the “value” should not only relate to cost but also to the intrinsic value associated with providing basic mobility.

- Cost (passenger miles per gallon, cost per revenue mile)
- Cost and revenue balance (exclude paratransit/Medicaid services?)
- Physical and health environment issues
- Safety (age of fleet and accident data)

Other measures discussed related to environmental and physical health, such as greenhouse gas (GHG) emissions and vehicle miles traveled (VMT) reduction, and safety such as fleet age and accident data.

## Developing Recommendations – Initial Observations

Sheila Dezarn discussed eight preliminary recommendations developed by the consulting team. The recommendations and comments on each recommendation are summarized below.

### *Policy/Planning – Initial Recommendation 1*

To address mobility issues in the future, develop policies that require key state services (e.g., health care, human service, etc.) to be located for accessibility.

- Richard DeRock suggested that this recommendation should note also that minority populations are increasing, which use transit at a much higher rate. Also, housing authorities should be linked to transit.

### *Operations – Initial Recommendation 2*

Define what level/elements of connectivity are important to the state network. Clarify roles of different service providers (i.e. state, transit, private, non-profit, etc.). Develop a comprehensive set of policies to guide conditions and circumstances for the usage of supporting infrastructure (i.e. HOV lanes, P&R's, bus/transit lanes, etc.).

### *Funding - Initial Recommendation 3*

Provide additional local options to ensure more predictable and stable funding, *and/or* establish new state funding source(s) that are directed at state goals and priorities (when feasible).

- Alice Tawresey suggested to the Panel that this recommendation should extend to ferries.

### *Funding – Initial Recommendation 4*

Explore shifting from a grants program to a formula funding program, and/or explore more flexible ways to deliver service.

- Rick Benner said that formula funding can be problematic if the pot of funding declines and it doesn't address the size of the funding source being used.

*Funding – Initial Recommendation 5*

Place greater emphasis on tying Regional Mobility Fund grants to projects that improve connectivity and system integration: capital projects (e.g., intermodal facilities), service demo projects (e.g., to test and build market), and technology projects (e.g., traveler information systems).

- Richard DeRock commented on the issue of demo projects, noting that this recommendation makes an incorrect assumption that the local agencies would have continuing funding to maintain a service or project, not getting start-up capital.
- Kelly Scalf seconded that stable funding is important to help build ridership.
- Jim Stanton suggested that essential public facilities legislation should be expanded to include public transportation. Transit Now is a good pilot program that should be expanded.

*Coordination/Oversight – Initial Recommendation 6*

Seek to align reporting in terms of timing and requirements. Consider seeking information from private operators and special needs organizations to provide more robust information on overall system.

- Kevin Desmond asked what happens to the state report (which includes information from the state TDPs and the federal NTD reporting). What is the purpose of having both?
- Katy Taylor answered that the list of requirements has gotten long over time, and the two reports are due at different times of year. WSDOT has been trying to align the processes and that some elements are legislatively mandated.
- Sheila Dezarn noted that the issue related to this recommendation is to minimize data reporting duplication.

*Coordination/Oversight – Initial Recommendation 7*

Build on and broaden existing OFM Transportation Progress Report. Incorporate public transportation measures systematically into this report. Use TDPs to document how proposed service and capital programs will address system performance.

- Jim Stanton asked how can we look more broadly? He suggested there is too much data reporting and we should choose only the best measures.

*Coordination/Oversight – Initial recommendation 8*

State could serve as a clearinghouse for providing comprehensive public information on services available.

*Other general comments*

- Levi Wilhelmsen commented that land use being linked to transportation priorities should be more represented in these recommendations.
- Chuck Ayers recommended that metrics to measure economic impacts should also be included.

**Comments and Adjourn**

The floor was opened to public comment – former Transportation Secretary, Doug McDonald commented on performance measures. He suggested that it's impossible to create a limited set of performance metrics to suit everyone's needs. The Gray Notebook was meant to convey facts to the public and legislators. Reports need to be based on more current data. He recommended that the audience look into the quarterly ridership report from Sound Transit (4-page document) and the Community Transit monthly report – both have rich data and tell of challenges and services provided.

The meeting adjourned after confirmation of the final meeting date, October 27. This meeting was originally slated for 10-1 at Sound Transit, but the team hopes to find a new venue so the meeting can be extended later into the afternoon.

## Meeting Summary

### JTC State Role in Public Transportation Public Transportation Advisory Panel – Workshop #4

Wednesday, October 27, 2010  
10:00 a.m. – 4:00 p.m.  
Microsoft

#### In attendance:

- Senator Mary Margaret Haugen, Senate Transportation Committee Chair
- Representative Judy Clibborn, House Transportation Committee Chair
- Representative Mike Armstrong, District 12
- Representative Marko Liias, District 21
- Katy Taylor, WSDOT
- Richard DeRock, Link Transit
- Kevin Desmond, King County Metro Transit
- Martha Rose, Island Transit
- Charlie Howard, Puget Sound Regional Council
- Rick Benner, Western Washington University
- Joni Earl, Sound Transit
- Jim Stanton, Microsoft
- Ted Horobiowski, Avista Corporation
- Virginia McIntyre, League of Women Voters
- Alice Tawresey, former Transportation Commissioner
- Gladys Gillis, Starline Luxury Coaches
- Tom Jones, Consultant
- Page Scott, Yakima Conference of Governments

#### Not in attendance:

- Representative Terry Nealey, District 16
- Senator Dan Swecker, District 20
- Representative Jim Moeller, District 49
- Senator Brian Hatfield, District 19
- Senator Curtis King, District 14
- Karen Stites, Amalgamated Transit Union, 1765
- Dave O’Connell, Mason County Transit
- Kelly Scalf, Rural Resources
- Hans Van Someren Greve, Stemilt Growers
- Chuck Ayers, Cascade Bicycle Club
- Levi Wilhelmsen, rider

The fourth workshop with the Joint Transportation Committee (JTC) Public Transportation Advisory Panel was held on October 27, 2010. The workshop was attended by 18 of the Advisory Panel members. The Parsons Brinckerhoff team, led by Sheila Dezarn and Barbara Gilliland, introduced the agenda for the workshop.

#### Microsoft Transportation Services Overview

Jim Stanton gave an introduction to Microsoft and its transportation program. Following are some highlights of Microsoft’s program:

- The Connector bus service provides 89 round trips per day and averages 2,500 riders per day.
- The Shuttle Connect internal circulation service provides service to 5,000 riders per day.
- There has been a slight uptick in the percentage of Microsoft employees who commute by car, but the company is very close to their 60% CTR goal. Only 5% of employees telecommute as their main mode of “transportation,” while 12% commute by bus.

- Microsoft's investment in the overpass construction on SR-520 is slated to pay back in connectivity and traffic reduction benefits within five years.

A number of questions from panel members followed the presentation.

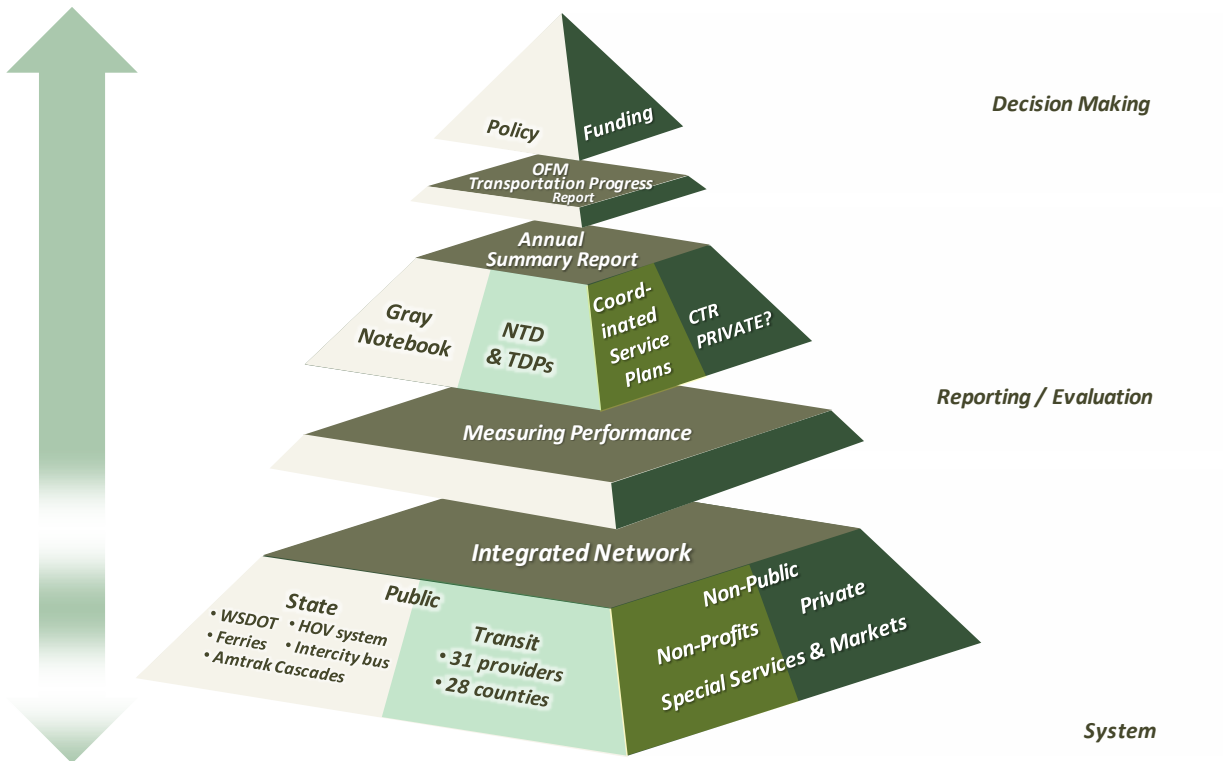
- Representative Clibborn asked how Microsoft coordinated with Metro. Kevin Desmond responded that the state law dictates that private providers like Microsoft must ask permission of the local transit industry to operate service that might replicate publicly provided service. Jim Stanton commented that the Connector complements Metro services, and does not compete with Metro operated services. Tom Jones suggested that agencies should give up their control of public transportation services when a private provider is willing to provide a public service for the greater good.
- Senator Haugen was surprised that telecommuting only accounts for 5% of the transportation choices. Jim Stanton responded that many people work part of the day at home or telecommute only on certain days.
- Representative Armstrong asked what fuel sources drive the Connector. Jim Stanton answered that some biodiesel is recycled from Microsoft cafes for the buses, and the Toyota Priuses are hybrids that are bought locally. The 45-foot buses are leased in used condition sometimes.
- Representative Llias said that we should look for good opportunities to partner, and should be thoughtful on when and where the private sector can operate.
- Gladys Gillis noted that bus emissions since 2008 have been drastically reduced. Martha Rose responded that while they have gotten cleaner, maintenance issues still represent a challenge and service reliability has been affected because of frequent breakdowns.

### **Draft Blueprint Introduction**

Barbara Gilliland introduced the draft blueprint framework to guide discussions over the course of this workshop. The full diagram is shown below. The framework organizes and integrates the elements of the public transportation system into three main levels: system, reporting/evaluation, and decision making. The arrow shows that the coordination and reporting process is meant to flow upwards to decision makers on an annual basis with policy direction and investment priorities established and flowing downwards on an annual basis.



Figure 1 – Blueprint Framework



Some comments followed the framework’s initial explanation. Richard DeRock voiced his concern that all services are shown equally in the Integrated Network. These areas should reflect their approximate level of service within the overall network. Senator Haugen said investments come down to a funding issue – “bang for buck,” but Representative Clibborn responded that the “bang for buck” idea creates a disadvantage for rural areas and that a spectrum of services will be needed.

### Performance Management – Sheila

Sheila Dezarn began a conversation about performance management and introduced the framework for a discussion about what to measure. Three steps for creating performance measures are:

- Step 1 – Decide what is important to measure
  - As it relates to state goals and state interests
- Step 2 – Determine how to measure
  - And whether data is readily available
- Step 3 – Articulate what the measure tells us

A table with sample performance measures organized as they relate to the state transportation goals was given to Panel members to help focus the discussion. Two questions were posed for discussion,

1. Are these the right things to measure?
2. Is this the right number of measures?

It appeared from the third workshop that mobility and stewardship were the state goals focused on by the panel. However, Kevin Desmond commented that mobility and stewardship were discussed more than other goals because of the time constraint. Sheila Dezarn commented that the team has tried to

choose measures where the data is currently readily available. Representative Llias referred to the public comment made by Doug McDonald; he wants to make sure we remember that the measurement recommendation should be rooted in the real world.

Many comments and suggestions were made by the Panel. The comments are organized based on the state goal the measure in question falls under.

#### *General Comments*

- Senator Haugen said this must be a tool to be used as a way to help create a new vision for the future. Representative Clibborn added that measures should also help to target investment decisions. Representative Clibborn indicated that the legislature will ultimately have to consider how limited dollars should be invested.
- Richard DeRock said that the measures identified are focused on transit. Measures should be developed that can be applied to all public transportation modes, including ferries, Amtrak, etc. A challenge will be that not all entities use the same approach or definition for the data. Katy Taylor responded that measures for multiple modes may not be comparable.
- Jim Stanton said that measures should be outcome based and allow for comparison among peers groups. They should be based upon goals and ultimately be able to be benchmarked. He noted that an area that seems to be missing using the state goals would be quality and customer service. Katy Taylor emphasized the need to develop measures that can highlight transit-dependent populations.
- Page Scott noted that measures should not be constrained to what is available today but should consider what would be beneficial for decision making even if it means that a method for collecting the data needs to be developed.
- Alice Tawresey emphasized that when the recommendations are being written they should be multi-modal-focused.
- Virginia McIntyre said it may be better to have measures that target more narrowly, as opposed to the very broad state goals.
- Gladys Gillis wanted to clarify the idea from workshop #3 that tow trucks and other services can't be outsourced, but it turns out that many companies meet federal requirements for drug testing, etc. She wanted everyone to know that many of her buses are accessible, so outsourcing is a potential. If contracts are available and granted, private providers will make changes.

#### *Safety*

- Senator Haugen said safety is "expected" by the public when it comes to public transportation. Measures don't generally tell much of a story. Richard DeRock said it's hard to measure how much safety has improved when people use transit instead of driving.
- Martha Rose said public transportation improves safety by definition. Measuring that just doesn't make sense.
- Page Scott commented that another area would be personal safety. Representative Llias added that considering pedestrian safety, safety for public transportation operators and emergency management are other areas that could be considered.
- Kevin Desmond said that macro-level measures aren't helpful, especially when it comes to fatalities.
- Representative Armstrong said we don't want to forego the safety goal, but instead try to integrate it with state-led safety improvement projects.

*Preservation*

- Joni Earl noted that the federal government is placing much greater emphasis on the state of good repair for many systems. This measure has been noted by many agencies.

*Mobility*

- Rick Benner said the mobility goal talks about people *and* goods, but the measure doesn't match.
- Jim Stanton noted that connectivity is a major factor of service. Representative Clibborn also added that often it is about the last (first) two miles of the trip that make the difference.
- Representative Llias says mobility goals should be per capita to account for population growth.
- Kevin Desmond said that mobility has a lot to do with access to services. He noted that land use has a big impact on accessibility. He also indicated that the notion of connectivity is a good measure, but increasing connectivity is not necessarily productive or cost-effective.
- Alice Tawresey said connectivity between modes is important.

*Environment*

- Richard DeRock commented that environmental measures should capture total benefits. Just the measure of use of alternative fuels does not get to the concept of total energy consumption per unit of service provided.
- Representative Llias suggested VMT reduction should be included in the environmental goal.

*Stewardship*

- Gladys Gillis made an argument to use a passenger miles per gallon measure she had outlined at the last meeting. It is a measure that could address multiple goals of the state. It is an effectiveness measure and could be used to address other state goals. We should create a metric that is made better by allowing shared resources. Representative Llias commented that there are limitations to the passenger miles per gallon measure because low ridership with low gas usage would appear to be the same efficiency as high ridership with high gas usage.
- Representative Llias said reliability should be a bigger factor, and that connectivity and quality of service should be part of stewardship.
- Alice Tawresey said the cost sometimes makes public transportation undesirable to riders. Measures related to congestion would only apply to Western Washington.
- Joni Earl said relating to stewardship and economic vitality could be the measurement of the percentage of family incomes that must be spent on transportation.
- Representative Armstrong said regarding stewardship, we overlook the private sector transit providers. We should consider the usage of facilities by private providers.

*Economic Vitality*

- Representative Llias suggested that in economic vitality, access to jobs should be per capita and jobs created.
- Representative Armstrong said there is a need to measure how we partner with businesses, including looking at how businesses are encouraging the use of public transportation. Page Scott added that it's also important to measure the financial benefits, such as Microsoft's assessment of the financial investment in building new access to their campus and the benefits of the Connector service.

- Joni Earl commented that measures such as how much people are spending on transportation, while a difficult measure to collect, would indicate how economic conditions have changed for citizens.
- Gladys Gillis wanted clarification on increase in direct agency jobs. Sheila Dezarn clarified that the number of jobs employed on public transportation should be measured. Ms. Gillis reemphasized that it should be a broad measure to indicate the growth in all public transportation jobs.

Following lunch, Barbara Gilliland summarized what the team heard in the performance measures discussion. She noted that there is clearly no one or set of perfect measures. However, as Representative Llias noted, that there needs to be a start somewhere and refinement over time. It is clear that developing a set of measures is complex and messy. However, the goal was to achieve some understanding of different points of view, not necessarily reach consensus. However, the team did hear in the discussion a few key themes, specifically that performance measures should:

1. Help guide and target investments
2. Be few in number
3. Serve as a proxy for other measures

## Review of Prior Meetings Highlights/Themes

Barbara Gilliland reviewed the content, discussions and feedback on each of the first three workshops.

This review included the following topics:

- Study purpose and projected outcomes
- Defining investment
- Advisory Panel One-on-One Interview themes
- Summary of current state roles
- Performance management and measurement
- Recommendations regarding roles that should be added, enhanced, or eliminated
- Peer analysis key findings
- Emerging trends and unmet needs
- Issues facing public transportation providers and resulting recommendations

Gladys Gillis commented that she wants the private sector involvement to be added to the “what you said” slide. Representative Llias said we need to be cognizant of current bidding laws when considering expanded private participation in public transportation activities.

## Draft Blueprint & Recommendations

Sheila Dezarn walked through the recommendations as they related to the building blocks of the draft blueprint diagram. Recommendations related to each category are outlined below.

### *Integrated Network*

#### Recommendations:

1. In each WSDOT region, create a new “regional integration role” to better integrate public transportation into state and regional planning activities.
2. Task WSDOT regional integration role with identifying specific connectivity gaps and priorities.

3. Task Public Transportation Division, working with providers, to establish conditions under which private providers can use public facilities (HOV lanes, park and rides, etc.).

Comments:

On recommendation #1, Kevin Desmond asked what the role would look like and suggested that guidelines be outlined in the recommendation. Senator Haugen said in some areas it should be taken to a sub regional level to ensure an understanding of local issues. Richard DeRock said this person should have the authority to make a difference. Katy Taylor questioned if it should be at the region or at the state level, and cautioned that it could be difficult to add to existing responsibilities. She also indicated there needs to be a connection between the region and headquarters so there is consistent application statewide. Page Scott said she appreciates current state WSDOT's efforts, but agreed that a more local perspective would be beneficial.

On recommendation #2, Representative Clibborn said this should be more like "opportunities" instead of the more negative wording of "gaps." Kevin Desmond urged us to find things to chase that are high-value. Jim Stanton said that having money set aside for local solutions would be a good incentive. Richard DeRock noted that transit service connections are often affected by decisions by others, such as his experience with provide a connection between Amtrak and the Stehekin Ferry. Sometimes the ends change without any regard to the total trip and connections are lost.

On recommendation #3, Katy Taylor says this is doable, but will require working with the legislature. Representative Llias said a statewide perspective is necessary. Jim Stanton is supportive; an inventory of owners could be a first step. Senator Haugen says if something is state-funded, it should be available to all citizens.

***Annual Public Transportation Summary Report***

Recommendations:

1. Align annual Transit Development Plans (TDP) and Coordinated Human Service Plans (CHSP) with federal reporting cycle and data requirements.
2. Refocus TDP reporting on transit needs and identified state performance measures.
3. Modify CTR reporting process to integrate with performance measures and also identify private reporting needs.
4. Broaden Annual Report on Public Transportation (ARPT) to include all public transportation providers and streamline and refocus into more analytic assessment of system performance, trends and issues.

Comments:

Jim Stanton wonders if it's necessary to provide all the reports, if no one has time to read through them and use their content. Richard DeRock said the amount of reporting is enormous, without anyone looking at it. Reporting requirements vary for each type of provider – the starting information isn't the same.

***OFM Transportation Progress Report***

Recommendations:

1. To provide policy makers with a complete picture of the transportation system, broaden current OFM Transportation Progress Report to include key measures drawn from Annual Report on Public Transportation focused on Mobility and Stewardship.

Comments:

OFM doesn't provide data on anything but state-run transportation, so we are suggesting the OFM report include other transportation data. Martha Rose said we need to provide some way to identify the separate types of Public Transportation services, such as demand response. Kevin Desmond said there are some measures that may not be relevant to the goals.

**Decision Making**Recommendations:**Funding Recommendations**

1. Focus Regional Mobility Fund to explicitly target evolving state priorities as informed by policy review process.
2. Provide predictable source of funds for health & human service and rural providers by exploring a shift from grants to formula funding or other, more predictable approach.
3. Establish new state funding source(s) and allocate based on state goals, priorities and interests.
4. To reduce volatility, provide new local options for transit to diversify and stabilize funding.

**Policy Recommendations**

1. Require key public services to locate accessible to public transportation options.
2. Consider broadening the essential public facilities definition to include elements of public transportation.
3. Modify TDP statute to reflect revised performance measures.

Comments:

Several members commented on funding recommendations #3 and #4. Senator Haugen said there is no new funding source available. Representative Clibborn said it doesn't have to be a new source, but maybe an enhancement to an existing source or a reallocation. There was discussion about looking at shorter term and longer term elements of the funding recommendations. Alice Tawresey suggested qualifying language such as "when funds are available." Page Scott noted that the loss of the MVET took away the incentive to create PTBAs, so maybe add a replacement tax. Richard DeRock noted that at this point it is a zero sum games since transit systems have lost so much revenue. It will take time to get new sources and it will take time to rebuild networks.

The discussion on new revenue sources resulted in the following ideas: Gladys Gillis said the private industry is moving toward environmentally-friendly coaches as a move toward efficiency in the future. Carbon credits can be traded. Senator Haugen suggested that with declining gas tax revenues, fees on other fuel sources should be considered. Page Scott said human services transportation providers have their own sources of transportation funding but there is nothing to motivate them to bring that revenue to the table; the state could create incentives for state agencies to demonstrate how they are coordinating with providers.

On policy recommendation #1, Joni Earl suggested that there needs to be a focus on developing new ways to encourage areas to want transit. Martha Rose said Island Transit is considered an essential public service due to concurrency. Representative Llias said we can make only select facilities "essential" to fall under this rule. Charlie Howard suggested that incentives could be developed to target local cities and counties to make land use decisions that attract public transportation.

On policy recommendation #3 Katy Taylor said should include the goals, priorities, and interests that would be addressed. Perhaps there is an incentive for ensuring connectivity; investments need to go to lifeline services and expanding infrastructure. Also, differentiate between the state's role and local roles.

### Panel Member Closing Remarks

The Panel was asked to provide closing comments. Given the discussion and information that was shared, each panel member was asked to provide one final piece of advice on the state's role in public transportation.

- Tom Jones noted that given the current financial conditions that there still may be a need to assess how dollars are being allocated and there may have to be another review of existing programs or services that should be reduced or eliminated or reprioritized.
- Representative Llias believes there is a new vision for public transportation. One that is more multi-modal and integrated and is "meeting people's needs and builds a better future." It's important that we start and understand that it will be a work in progress.
- Richard DeRock said that connectivity, while important, needs to be balanced with existing needs. It may be necessary to identify a stop gap measure to preserve connectivity since these services are the ones that often get cut because they are less productive.
- Senator Haugen said we need to make sure that in the future we have some new ideas to build on.
- Ted Horobiowski said that public-private investment goes well when incentives are involved. The CTR model has show this can work and may be something to consider further.
- Katy Taylor says there is a role for partnerships with private operators. In the future, let's focus on how we can accomplish things and be committed.
- Representative Clibborn wants us to remember that we need revenues to cover bonds. We do have a vision, and we will at some point have to go forward with new revenue.
- Kevin Desmond says money is always going to be tight. The more we think in an integrated fashion, the better off we are. Going forward, system and multimodal integration should be part of the solution.
- Gladys Gillis says her drivers are upset that public transit drivers get paid high salaries for special event service provision due to union laws that create the need for drivers to be on overtime, while she wants to be able to provide the service.
- Joni Earl hopes that the report can successfully pull in the themes as well as the details we have discussed.
- Senator Haugen: "Nobody cares what color the bus is."

### Public Comment and Adjourn

John Niles, research associate at a transportation institute, made a short presentation. Regarding translating the state goals into recommendations, some are inputs and some are outputs. A sense of the limits of what transit can do is important. It's important to understand the what, where and how much since we can't buy our way out of the problem.

The final workshop adjourned with the understanding that a preliminary draft report would be available to panel members in mid November just prior to being submitted to the JTC at the end of the month.