

Metro Vision 2028 Plan

APPENDICES

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Unpacking Customer Satisfaction: Customer Satisfaction Survey Results

Summer 2017



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INTRODUCTION

The Los Angeles County Metropolitan Transportation Authority (Metro) seeks to better understand the transportation needs and concerns of Los Angeles County residents and workers. Metro conducted a customer satisfaction survey to identify specific elements that affect customer satisfaction and assess relative importance of those elements to the customer. The survey included an online component and complementary focus group research to ensure adequate reach. The results of the survey will inform the development of an agency-wide Metro Strategic Plan and help Metro more effectively tailor services to our customers, which include all residents and visitors to Los Angeles County.

METHODOLOGY

Audience

Metro conducted a large-scale online survey of transit riders and non-riders. The demographics of respondents were compared to previous Metro surveys and Los Angeles County Census data to confirm a representative sample. In addition, the agency conducted focus group research to provide a deeper dive into groups that are historically more challenging to engage, such as those with limited English proficiency and low income, elderly and minority populations.

Survey Administration

Online Survey. The online survey was administered from June 1 - 30, 2017, and distributed through a combination of email invitations and social media, such as targeted Facebook ads, with a goal of receiving 20,000 responses. The survey was administered online using Facebook Ads Manager, which is a self-service tool that enables Metro to create and manage advertisements on Facebook. The ads targeted people 18 years old and older living in Los Angeles County, based on user profiles and behavior data from Facebook's social media platform. The survey was also available in English, Spanish, Chinese, and Korean languages, representing the most prevalent languages spoken in Los Angeles County. To incentivize participation in the survey, respondents were entered into a raffle drawing to win a prize.

Focus Group Research. Metro contracted with Evitarus, a public opinion research and public policy consulting firm, to design and conduct focus group research that can supplement the online survey. The research was conducted in July and August 2017, and consisted of five focus groups, segmented primarily by language, including two groups conducted in English and one group each in Spanish, Chinese, and Korean. The English groups were conducted among two populations shown by prior research to have distinctive opinions on transit and transit equity issues: residents over the age of 50, and African Americans. Each focus group was comprised of a gender-balanced mix of nine to ten participants. The groups also included residents with varying degrees of education, Internet and social media usage, as well as those with physical or mental health conditions that affect daily life and mobility (disability).





Survey Design

Online Survey. Metro designed the survey instrument to explore how and why respondents make transportation decisions by addressing the following areas:

- **Transportation behaviors**, including modes of transportation that respondents typically use, types of Metro transit services (e.g., bus, rail) that they use, frequency of usage, and why they use or do not use Metro transit services;
- **Attitudes** toward various attributes of public transportation, such as safety, reliability, travel time, comfort, access, and knowledge of how to use the system;
- **Demographic information**, including household income, age, gender, ethnicity, and employment status.

The complete list of survey questions is in Appendix A. The survey design includes a skip logic feature that enabled Metro to better tailor the relevant questions to the individual respondents. Appendix B provides an outline of the skip logic feature and sequencing of questions. This shortens the length of time needed for participants to take the survey by providing only questions that are relevant to them, thus increasing the chances that they will complete the entire survey.

Transportation profiles of the respondents were established through a series of questions towards the beginning of the survey to understand their transportation behaviors and their attitudes towards public transit, as described below. In order to identify attributes that may be specific to rail or bus services, a series of questions specific to rail usage were asked first, followed by questions specific to bus.

- **Types of Metro transit services used** (i.e., use both bus and rail services, use bus services only, use rail services only, don't use Metro transit services). Although LA Metro offers a suite of services to meet the diverse needs of LA County residents and visitors, including rail and bus services, Express Lanes, regional bike share, among other services, this survey was designed specifically to gauge satisfaction with Metro's transit services as a starting point. By identifying specific attributes of transit that affect customer satisfaction and assessing the relative importance of those attributes to the respondents, Metro can identify opportunities to leverage other services that can complement the transit riders' experience or offer other mobility options that better suit the respondents' preferences and needs.

- **Frequency of transit usage** (i.e., frequent, occasional, infrequent, never). Based on the respondents' answers to frequency of transit usage, they were asked follow up attitude questions tailored to their previous responses. If respondents indicated that they use Metro transit services three times a week, Metro assumed that this was one of their primary modes of transportation; therefore, they would be asked questions regarding why they choose to ride Metro and how Metro can better serve them. Respondents who indicated that they use



Metro transit services one to two times a week were asked what improvements Metro could make to encourage them to ride more frequently, since Metro assumed that there may be opportunities to encourage increased usage. Any respondent who indicated that they do not use Metro transit services regularly, had never used Metro transit services, or stopped using these services were asked specific questions to help identify how they chose their current mode of transportation. Below is an overview of survey question design around the frequency of transit usage, which then leads to tailored questions related to attitudes about various attributes of public transit.

- *Infrequent/Non-riders*: For respondents who never rode Metro transit or used it infrequently, questions were designed to identify the respondents' modes of travel, frequency at which they use those modes, reasons for not using Metro transit, main reasons for using their current mode of transportation rather than using Metro transit, and suggested actions that Metro can take to encourage their patronage of Metro transit services. The survey questions are designed to identify the main attributes, or factors, influencing these respondents' travel decisions, types of improvements that could attract these respondents to Metro transit services, or opportunities to match them with other mobility services beyond Metro rail or buses.
- *Current riders*: For current Metro riders, questions were designed to understand the factors (e.g., convenience, traffic, cost, lack of car availability, etc) that influence their decision to use Metro rail or bus, relative importance of those factors, purpose of their trips, and likelihood that they would recommend Metro rail or bus services to a friend or colleague. For respondents who ride less than three days a week, follow up questions were designed to identify actions and improvements that would encourage them to ride more often (e.g., more frequent service, more reliable service, more late-night service, better information, better access to transit, etc) as well as identify the highest priority improvement that would increase their usage.
- *Previous riders*: For respondents who previously rode Metro rail and/or bus, but no longer use these services, questions were designed to identify how long they rode the Metro system before they stopped, their current modes of travel, frequency at which they use those modes, main reasons for using their current mode of transportation rather than using Metro transit, and suggested actions that Metro can take to encourage their patronage again.



- Customer Satisfaction and Priorities.** Previous survey studies undertaken by Metro focused on what problems affect Metro riders and non-riders, and reported the problems that were mentioned the most. This survey attempted to accomplish that same task, while also asking for the respondent’s main reason for using Metro transit services or the main improvement that would encourage them to use the services more often. The survey questions are designed to identify the main attributes, or factors, influencing respondents’ travel decisions and the relative importance of those attributes. This approach provides Metro with insights into factors that are very important to customers and opportunities for Metro to focus and prioritize improvements and resources based on the customers’ needs and preferences.
- Overall opinions and perceptions of Metro transit services, using the net promoter score.** The net promoter score, which is widely used by many companies, is a metric used to gauge the customer’s overall level of satisfaction with a company’s services or products. For respondents who currently use Metro bus or rail, the survey includes a question asking about their likelihood to recommend Metro rail or bus to a friend or colleague. Their response options are shown on a sliding scale of zero, which indicates not at all likely to recommend Metro rail or bus, to 10, which indicates extremely likely to recommend the service. The respondents’ answers are used to calculate the net promoter score, which is divided into three groups, as shown in Table A. It is calculated by subtracting the percentage of detractors (scores of six or lower) from the percentage of promoters (scores of nine and ten). Passive scores are not factored into the calculation in this case. The goal is to increase the number of promoters and decrease the number of detractors.

Table A. Net Promoter Score Range

Score range	Customer perception
0 to 6	Detractor: customer holds a negative opinion of the service
7 to 8	Passive: customer has a neutral or passive opinion of the service
9 to 10	Promoter: customer holds a positive opinion of the service and would be willing to promote it

Focus Group Research. The focus group research was designed to supplement the online survey, with a specific focus on demographic subgroups that may have been unrepresented or underrepresented in the survey’s sample. The full report on this research is in Appendix C.

ANALYSIS AND RESULTS

There were 18,198 total respondents to the online survey, with 16,446 survey takers who completed enough of the survey to be included in the segment analysis. Metro analyzed the survey results to identify key segments of users in Los Angeles County that may have similar travel characteristics, based on respondents' answers to questions that assess their transportation behaviors, attitudes towards various attributes of public transit, and their likelihood of using Metro transit services. Appendix D provides an overview of the questions and responses used to categorize these user segments. The focus group research was not included in the user segment analysis due to the much smaller sample size and the objective of reaching targeted, unrepresented or underrepresented, demographic populations.



Key User Segment Characteristics

Based on the results of the analysis, Metro identified the following seven key user segments and the characteristics of each group, including factors that drive their transportation decisions, demographics (e.g., age, gender, ethnicity, household income, employment status), level and frequency of transit usage, and willingness to promote Metro's services, which was quantified through the net promoter score. The user segments are listed in order from most frequent Metro transit users to the least. The seven user segments make up 83% of survey respondents. The remaining 17% of respondents had myriad and disparate characteristics that could not be meaningfully classified into distinct categories. Net promoter scores were not available for *Drivers Who Occasionally Ride Rail*, *High Potential Transit User*, or *Previous Bus/Rail Rider* groups since they use Metro transit services very infrequently. Table B provides a snapshot of the demographic makeup of each user segment. For a more detailed summary of the demographic makeup, see Appendix E.

Table B. Snapshot of Demographic Makeup of Respondents by User Segment

	Savvy Transit Users	No Hassle Travelers	Frequent Bus Patrons	Frequent Rail Patrons	Drivers Who Occasionally Ride Rail	High Potential Transit Users	Previous Bus/Rail Riders	Other*
Total Number of Respondents	4,606	1,792	970	828	1,323	3,320	746	2,861
% of Total Respondents	28%	11%	6%	5%	8%	20%	5%	17%
Employed full-time	50%	67%	48%	75%	67%	59%	59%	
Annual Household Income: Less than \$50,000	65%	36%	61%	28%	23%	33%	52%	
Annual Household Income: More than \$100,000	12%	28%	12%	34%	39%	32%	17%	
African American/Latino	44%	26%	40%	20%	13%	25%	42%	

*Consist of remaining respondents who could not be meaningfully classified into distinct categories.

Savvy Transit Users (28% of respondents)

- Transportation decisions driven by convenience, cost, and transit-dependency.
- Likely to live close to rail station (60% of respondents in this group live within a 20-minute walk of a station).
- Very diverse transit trip purposes: 20-40% of them ride Metro bus and rail three or more times a week for school, groceries, personal errands, and/or other non-work trips.
- Approximately 39% of them ride primarily because they do not have a car or driver's license.
- Highest percentage of Latino and African American respondents of all segments.
- Less likely to be employed full-time than other segments, except for *Frequent Bus Patrons* group.
- Lowest household income of all segments.
- Net Promoter Score is 21% for rail, which is surpassed only by the *No Hassle Traveler* group.

No Hassle Travelers (11% of respondents)

- Transportation decisions driven by convenience, traffic, trip reliability, strong preference for consistent travel time, and travel speed.
- Likely to live close to rail station (62% of respondents in this group live within a 20-minute walk of a station).
- Only segment with a higher percentage of men than women (53% versus 46%, respectively).
- Second most likely of all groups to be employed (86% employed at least part-time). Much more likely to have a full-time job. Likely to be commuters.
- Sixteen percent more likely to have household income over \$100,000 per year than *Savvy Transit Users*.
- Diverse range of household incomes.
- Net promoter score of 26% for Metro rail, which is the highest of any user group. They are more likely to praise Metro rail to their friends and colleagues and be a champion of Metro rail service than any other rider segment, even though most of them have other mobility options.

Frequent Bus Patrons (6% of respondents)

- Transportation decisions driven by cost, transit-dependency, and close proximity to bus stops.
- Likely to live far from rail stations.
- Very diverse transit trip purposes: 18-30% of them ride Metro buses three or more times a week for school, groceries, personal errands, or other non-work trips.
- Third highest percentage of total Latino and African American respondents of any group.
- Tend to be younger (under 25 years old) or older (over 50 years old) compared to other groups.
- Second highest percentage of female respondents of any group.
- Lower income. Tied with *Savvy Transit Users* for lowest percentage of households making over \$100,000 per year.
- They are more likely to be satisfied with Metro bus service, think their bus is generally on time, and feel safe while waiting for and riding Metro buses than the *Savvy Transit Users*. Yet, they are more likely to be in the middle of the net promoter score spectrum and have a neutral or passive opinion of Metro's transit service.

Frequent Rail Patrons (5% of respondents)

- Transportation decisions driven by the fact that Metro rail provides them an opportunity to avoid driving in traffic.
- Likely to live near Metro rail station (59% of respondents in this group live within a 20-minute walk of a station)
- Many of them are high frequency users who recently started using Metro rail. More likely to ride Expo and Gold Lines and less likely to use all other rail lines compared to the *Savvy Transit Users*.
- Second highest percentage of white respondents of any group.
- One of the top percentages of any group to be of prime working age (age 25-49).
- Wealthiest of all groups that ride at least once a week. Most likely to be employed (91%) and employed full time (75%).
- Nearly three times as likely as *Savvy Transit Users* to have household income of \$100,000 or more.
- More likely to have neutral or passive opinion regarding Metro rail. They have the lowest Metro rail net promoter score of any group, at 16%, but there is still 16% more promoters than detractors.

Drivers Who Occasionally Ride Rail (8% of respondents)

- Transportation decisions driven by trip reliability and a desire to control their work trips and avoid unknown factors, such as traffic levels, transfer wait times, and parking availability.
- Concerned with safety, comfort, and knowledge of Metro bus system.
- Likely to live far from Metro rail station. They overwhelmingly feel that Metro rail is too hard to access (e.g., too far from their house, too far from where they want to go, and lacks parking at stations).
- Ninety-seven percent of them drive alone at least once a month but only 65% of their total trips are single occupancy vehicle trips.
- Highest percentage of white respondents of any group.
- One of the top percentages of any group to be retired.
- Highest percentage of female respondents (59%) of any group.
- Wealthiest of all user groups. Fifteen percent more likely than the survey average to have annual household income of more than \$100,000 and 21% less likely to make under \$40,000.

High Potential Transit Users (20% of respondents)

- Transportation decisions driven by convenience, ease of use, and travel speed.
- Most feel that Metro rail is fast but very hard to access. Sixty-one percent of them list access as the main reason they do not ride Metro rail.
- Most agree that Metro bus is fine in terms of safety and cleanliness. However, 54% of them list long travel time and slow speed as the main reason they do not ride Metro bus.
- Currently ride both Metro bus and rail but use neither service more than once a month.
- Fifty-six percent of their total trips around Los Angeles County are done by driving alone; however, this group has a diverse travel profile consisting of:
 - 21% walking
 - 7% dropped off by friend or family member
 - 5% using Uber/Lyft
 - 5% biking
- Forty percent of respondents in this group are 50 years or older and 10% of them are retired, both of which are the highest percentage compared to any other groups.
- More likely to be female (56%) than survey average.
- Diverse range of household incomes.
- Unlikely to hold extreme positive or negative views of transit.

Previous Bus/Rail Riders (5% of respondents)

- Transportation decisions driven by cost, convenience, and safety.
- Feel more strongly about safety compared to other groups.
- Large percentage of respondents used to ride for school.
- Heavy mode switch to single-occupancy vehicles despite previously being frequent Metro transit user.
- Thirty-five percent of people in this segment previously rode Metro rail at least three or more times a week for school. For 18-24 year old Latinos in this bracket, 91% previously rode three or more times a week for school.
- Of the white women who stopped riding rail, 23% listed safety as the main reason. This statistic is 19% for bus riders. More than half of this group had previously ridden Metro bus and rail five or more times a week for various lengths of time before leaving the Metro transit system.
- Second highest percentage of total Latino and African American respondents and lowest percentage of White respondents of any group.
- Most likely to be of prime working age (25-49) compared to other groups. Six percent more likely to be under 35 years old than survey average.

Common Issues Across User Groups

Common issues were identified across the different user groups, as described below. Findings from the focus group research generally corroborated those of the online survey, with the exception of perceptions around safety, which is further explained below.

Frequency, reliability and total trip time on bus. Thirty-three percent of *Savvy Transit Users* and 27% of *Frequent Bus Patrons* who ride Metro bus one to two days a week indicated that more frequent bus service would encourage them to ride more often, with many preferring 5- or 10-minute frequencies during peak hours and 10- or 15-minute frequencies during off-peak hours.

Respondents across many user groups, including *High Potential Transit Users*, *No Hassle Travelers*, *Drivers Who Occasionally Ride Rail*, *Frequent Rail Patrons*, and *Previous Bus/Rail Riders*, indicated that the primary reason they don't use Metro bus is because this service takes too long and is too slow. Many indicated that buses are slowed by automobile traffic, stuck at traffic lights, lack dedicated bus-only lane, and require too many transfers. The factors listed by respondents are inter-related and affect overall trip time. The lack of reliability and consistency of service influences their decisions to use other transportation options rather than taking Metro bus.

Access to/from Metro rail. Sixty-one percent of *High Potential Transit Users*, 58% of *Drivers Who Occasionally Ride Rail*, 67% of *Frequent Bus Patrons*, and 45% of *Previous Bus/Rail Riders* stated that access to and from Metro rail is difficult, with many respondents indicating that rail stations are too far away from their home or destination. Access to and from Metro rail stations were main factors that influence their decision to use other modes of transportation rather than Metro rail.



New Metro rail lines to new places. Thirty-one percent of *Savvy Transit Users*, 39% of *No Hassle Travelers*, and 35% of *Frequent Rail Patrons* who ride one to two days a week indicated that new rail lines to new places would be the primary reason influencing them to ride more often.



Safety concerns. Respondents to the online survey, across all user groups, indicated that safety on Metro bus and/or rail was a concern. When asked to identify the main reason or top improvement that they prioritize, many respondents ultimately listed other service attributes. Although safety was a concern, it was not the main concern relatively to other factors, according to respondents to the online survey. However, safety emerged as one of the top issues in the focus group research. Participants in each focus group identified safety as one of their top concerns about Metro rail and buses. Safety, for most participants, means protection from other riders. By all indications, participants' concerns about safety appeared to stem from a combination of their personal experiences on Metro rail and bus, and stories about crime passed from person-to-person by word of mouth. African American and Latino participants expressed significant concerns about racial profiling and discrimination by law enforcement and Metro fare-checking personnel when taking public transportation.

Better information. Respondents expressed preferences for availability, clarity and accuracy of information regarding bus lines, transfers and arrival time per schedule or online apps.

Customer Satisfaction and Priorities

Table C provides an overview of the respondent's level of satisfaction with various elements of Metro's transit services and the level of importance they place on those elements, for each user segment. The information included and its placement on the quadrant in Table C is based on a variety of questions aimed at assessing the respondent's level of Metro transit usage, overall perceptions of Metro bus and rail services, and the respondent's primary concerns regarding those services. Table D provides an overview of the questions that were asked in the survey to identify the main reason or top improvement that users prioritize.

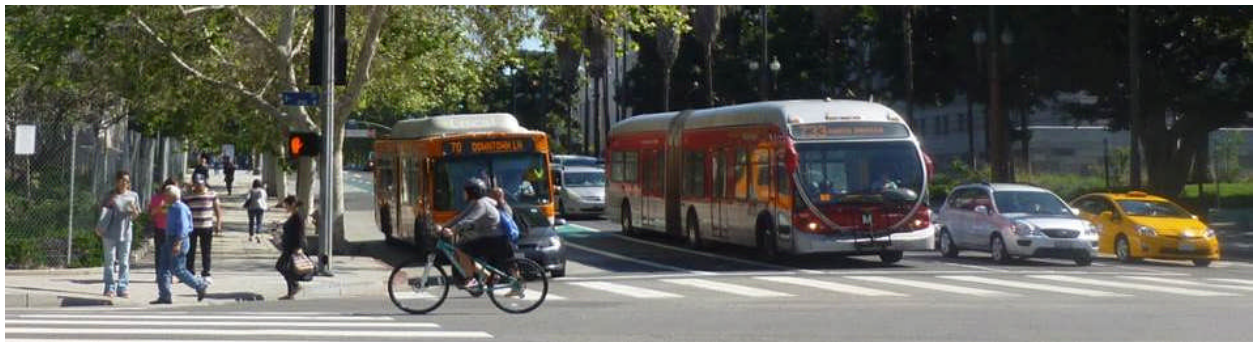
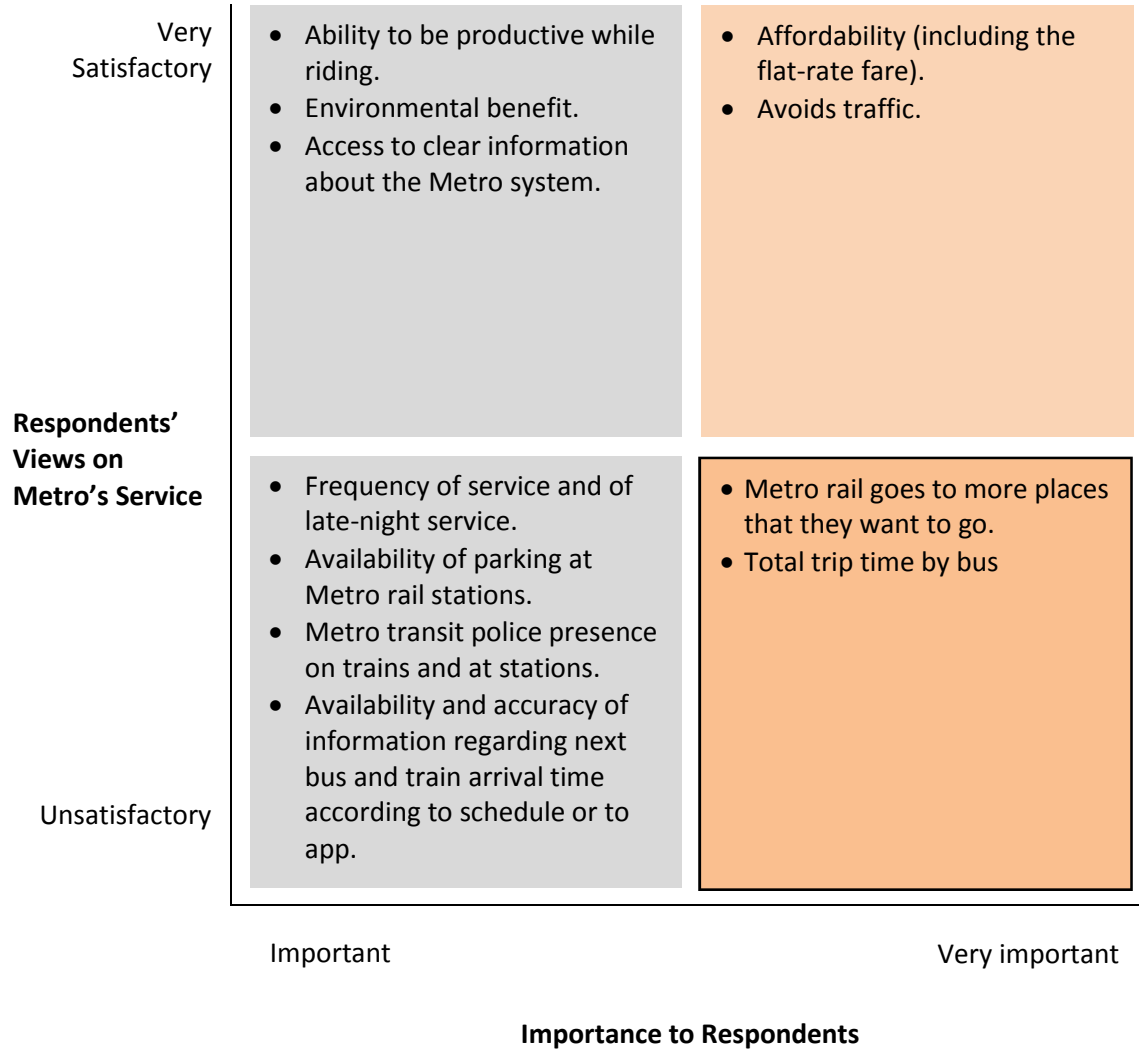


Table C. Customer Priorities and Level of Satisfaction

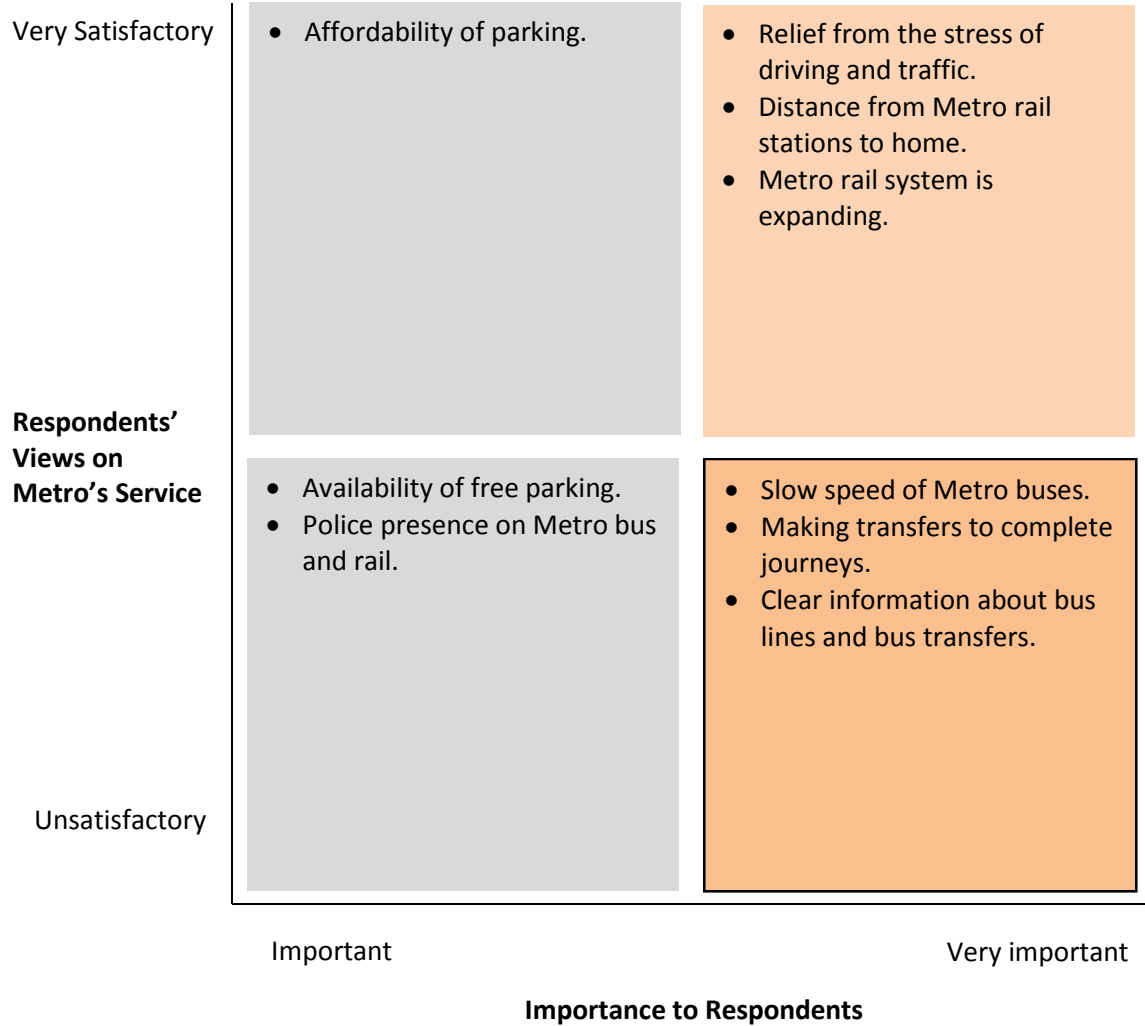
Savvy Transit Users (28% of Respondents)

Very Satisfactory	<ul style="list-style-type: none"> • Environmental benefit. • Affordable parking. • Convenient flat-rate fare. • Ability to be productive while riding. • Bus stops are near home. 	<ul style="list-style-type: none"> • Ease of use. • Avoids traffic. • Affordable solution for those who cannot afford a car and driver’s license.
Respondents’ Views on Metro’s Service	<ul style="list-style-type: none"> • Availability and accuracy of information on <u>next train</u> arrival time according to schedule or to app. • Fare discounts for low-income riders. • Presence of transit police on trains and at stations. • Cleanliness of buses and trains. 	<ul style="list-style-type: none"> • Availability and accuracy of information regarding <u>next bus</u> arrival time according to schedule or app. • Metro system goes to places that they want to go. • Frequency of bus service. • Frequency of late-night service. • Consistency and reliability of bus headways.
Unsatisfactory		
Important		Very important
Importance to Respondents		

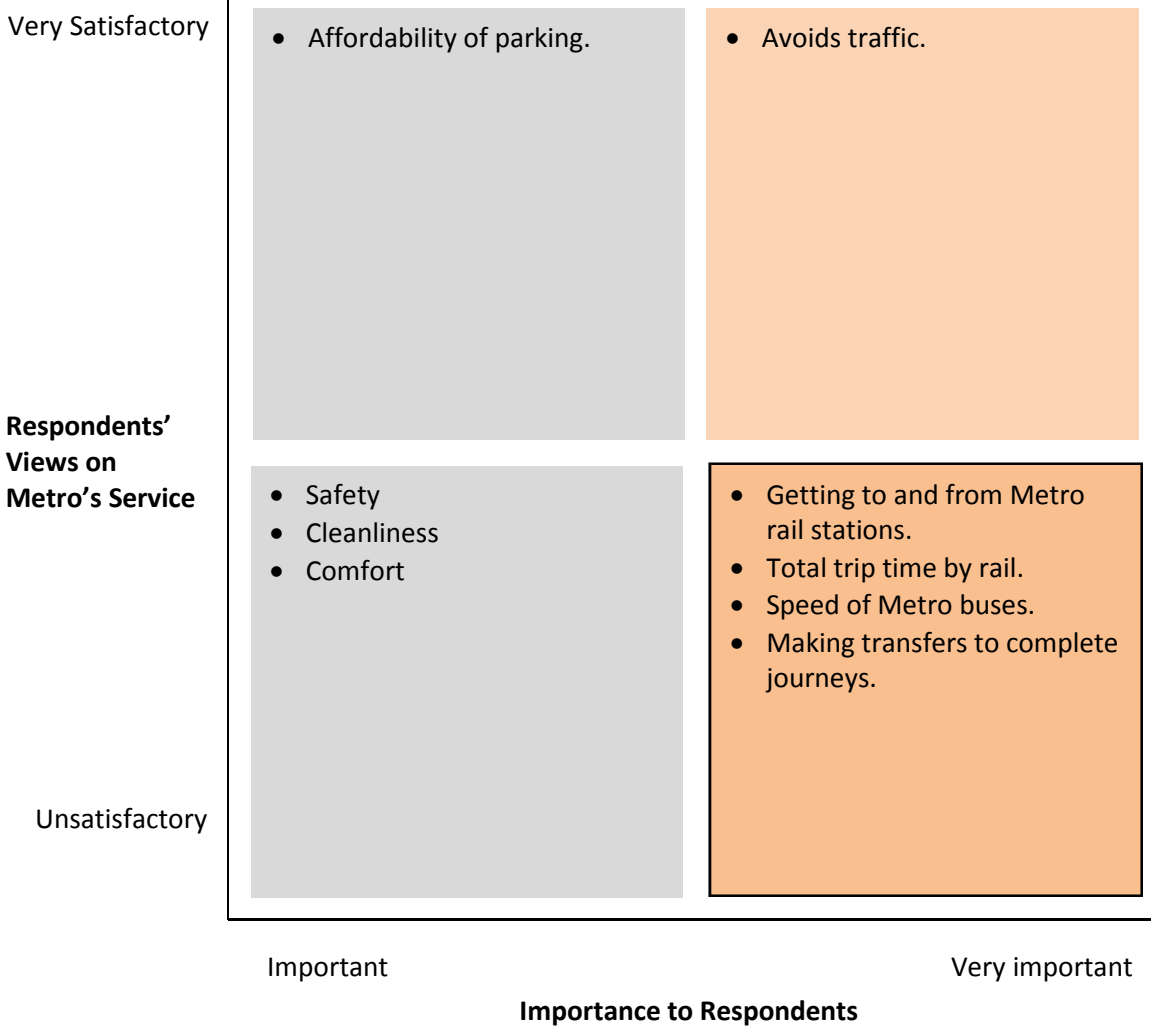
No Hassle Travelers (11% of Respondents)



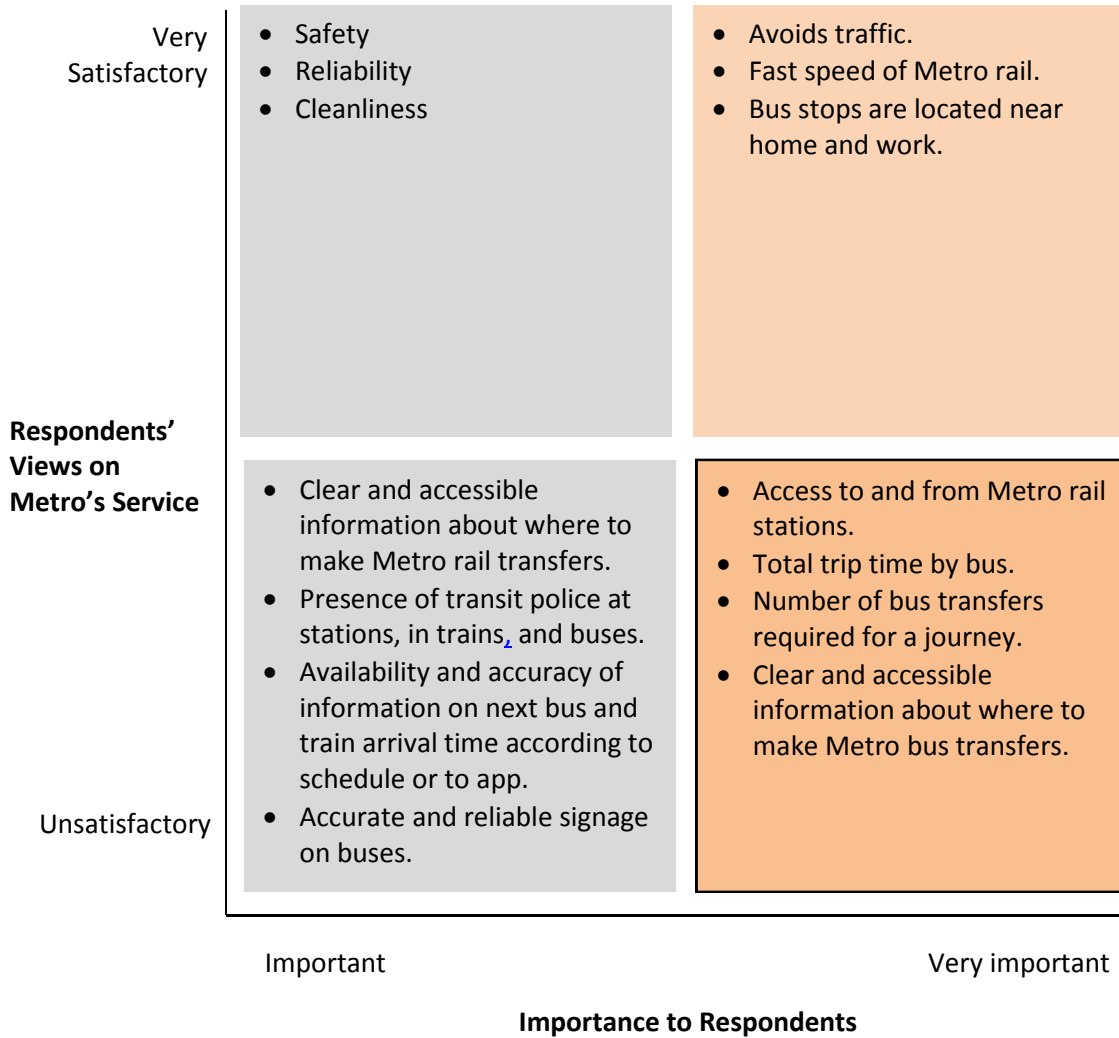
Frequent Rail Patrons (5% of Respondents)



Drivers Who Occasionally Ride Rail (8% of Respondents)



High Potential Transit Users (20% of Respondents)



Previous Bus & Rail Riders (5% of Respondents)

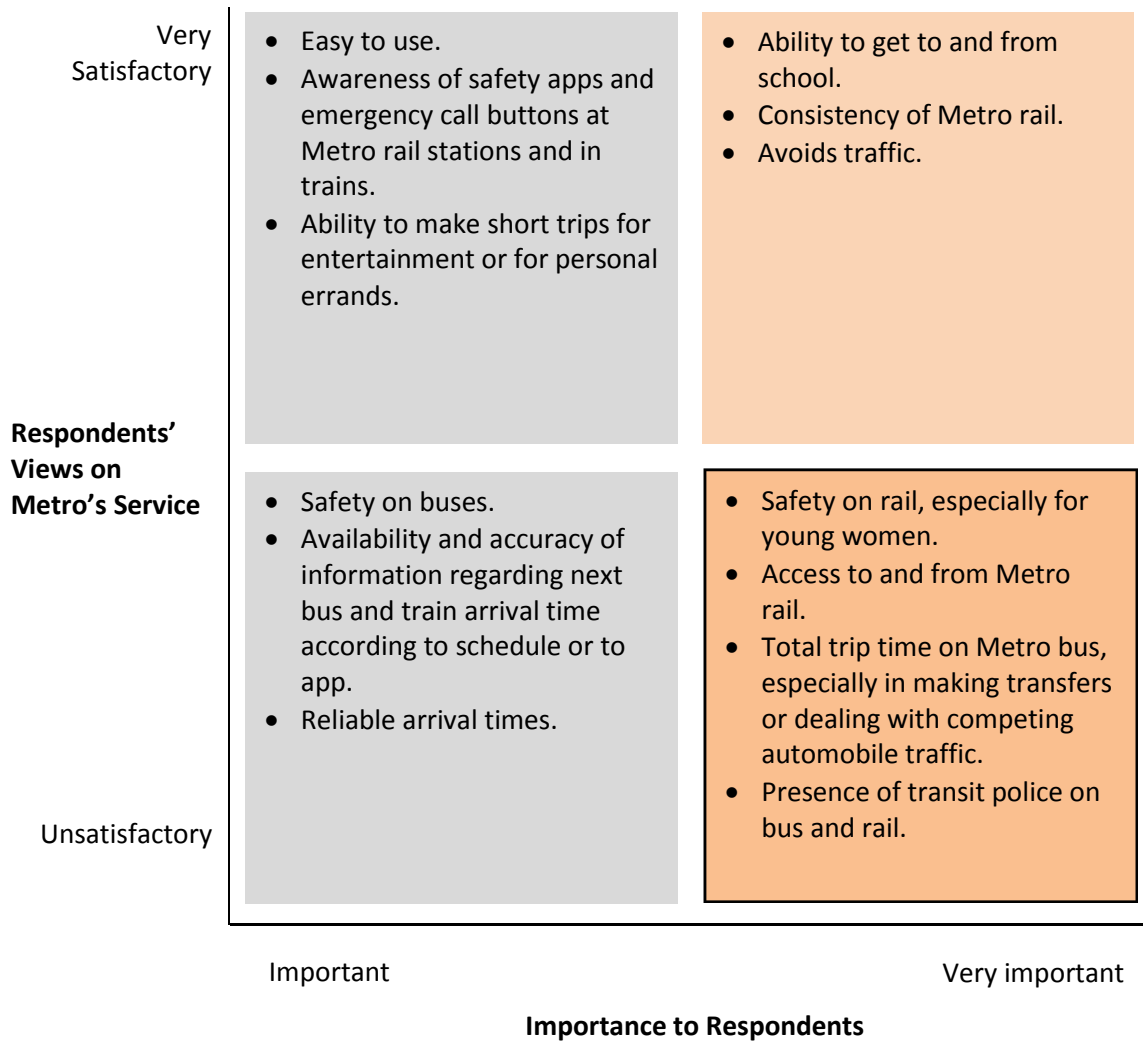


Table D. Questions to Identify the Main Reason or Top Improvement That Users Prioritize

Rail		Bus	
If you ride Metro Rail 3 or more times a week		If you ride Metro Buses 3 or more times a week	
Q25	<p>What is the MAIN reason you ride Metro Rail?</p> <ul style="list-style-type: none"> It is convenient for me to use I do not want to drive in traffic It is cheaper than the cost of parking I do not have a car available to use I do not have a driver's license It is good for the environment 	Q88	<p>What is the MAIN reason you ride Metro Buses?</p> <ul style="list-style-type: none"> It is convenient for me to use I do not want to drive in traffic It is cheaper than the cost of parking I do not have a car available to use I do not have a driver's license It is good for the environment
If you ride Metro Rail 1-2 times a week		If you ride Metro Buses 1-2 times a week	
Q38	<p>What is the #1 IMPROVEMENT that would encourage you to ride Metro Rail more often?</p> <ul style="list-style-type: none"> More frequent service More reliable service More late-night service More weekend service New rail lines to new places Lower fares Improved customer amenities Better information More security on trains More security at stations Cleaner trains Cleaner stations Better access TO stations when I am walking Better access FROM stations to my final destinations when I am walking More parking available at stations 	Q98	<p>What is the #1 IMPROVEMENT that would encourage you to ride Metro Buses more often?</p> <ul style="list-style-type: none"> More frequent service More reliable service More late-night service More weekend service Lower fares Improved customer amenities Better information More security on buses More security at bus stops Cleaner buses Cleaner bus stops Better access TO bus stops when I am walking Better access FROM bus stops to my final destinations when I am walking
If you ride infrequently, have never ridden, or previously rode Metro Rail		If you ride infrequently, have never ridden, or previously rode Metro Buses	
Q7 & Q62	<p>What is the MAIN reason you use your CURRENT mode of transportation instead of Metro Rail?</p> <ul style="list-style-type: none"> Metro Rail takes too long/is too slow Metro Rail is not reliable It is too hard to get to and from Metro Rail I do not feel safe using Metro Rail I am not comfortable on Metro Rail I do not know enough about Metro Rail to feel confident riding 	Q74 & Q118	<p>What is the MAIN reason you use your CURRENT mode of transportation instead of Metro Buses?</p> <ul style="list-style-type: none"> Metro Buses take too long/are too slow Metro Buses are not reliable It is too hard to get to and from Metro Bus stops I do not feel safe using Metro Buses I am not comfortable on Metro Buses I do not know enough about Metro Buses to feel confident riding

SUMMARY AND RECOMMENDATIONS

Metro has the opportunity to leverage its suite of services to provide an outstanding complete trip experience. The agency operates numerous services designed to provide customers with a plethora of mobility options, including the use of buses, trains, regional bike share, and ExpressLanes, among other services. Based on people's attitudes about public transportation, key factors that influence their transportation choices, and demographic characteristics, Metro can tailor and match its suite of services to meet the needs and preferences of different segments of the market. Below are recommendations based on the findings from the online survey and focus group research.

Improve Metro bus service to attract and promote more usage (frequency, reliability, travel time, transfers, information). Improvements to Metro's bus services, including enhancements to frequency, reliability, and travel time, as well as more accurate information, may enable Metro to further attract and promote more frequent usage. Despite respondents' proximity to bus services, many people did not feel that this was a viable form of transportation for them. Many expressed concerns that buses were too slow and took too long to get them where they wanted to go. Many respondents attributed this issue to buses operating on congested streets, being stuck at traffic lights, and lacking dedicated lanes that would prioritize bus travel. In addition, respondents were concerned about the need to make multiple transfers, which may further affect reliability, since wait time between transfers can contribute to uncertainty of the transit connections and add to the overall trip time for completing the journey.

This survey result can help Metro better understand the priorities of its customers in terms of what type of service performance and outcome they expect and identify strategies to deliver a world-class bus system that is effective, reliable and desirable for more people, for more trips. The results of this survey will inform the Metro Strategic Plan, which will identify key initiatives to further achieve this outcome and complement Metro's existing work, such as the NextGen Bus Study.

Improve access and connectivity across the suite of mobility services to provide better choices for all user groups. Metro has an opportunity to improve the trip taking experience along the customer's entire journey, recognizing that multiple entities are involved in various aspects of that journey. A number of respondents indicated that access to and from Metro rail stations posed challenges to using rail service. More detailed assessments may be necessary to identify the specific challenges experienced by each user group in order to identify the applicable solutions. Metro's first last mile planning work generally looks at a 3-mile bike shed and one half-mile walk shed for infrastructure improvements to access transit; however, more research may be necessary to understand the types of challenges that customers face, including the distance they must travel to access the transit network, the integration and coordination of mobility services (e.g., rail and bus connections and intermodal transfers), and the quality of transportation infrastructure, which may help or hinder access. The emergence of on-demand rideshare services and micro-transit service models provides additional opportunities for Metro to enhance access to transit and pilot new mobility services that meet the needs of public transit customers. In addition, improvements to access, connectivity, and integration across the entire transportation network will be critical to provide seamless travel, whether people choose to walk, bike, take transit, use rideshare services, or drive. Metro has an opportunity to leverage its resources and influence to encourage public and private sector partners to be part of the solution to improve connectivity and integration of infrastructure (e.g., sidewalks, bikeways, transit facilities, highways, roadways, etc) and mobility services (e.g., rail service, bus service, bike share, Express Lanes, rideshare service, etc) to provide better choices for all user groups.

Enhance Safety. A majority of the participants in the focus groups indicated that greater police presence and security cameras would increase their sense of safety. In 2017, Metro established a new security contract to put more police on Metro buses and trains. The agency is also working with social service agencies to get help for people who are on the Metro system and require support services. However, African American participants, and some Latino participants, raised substantial concerns about racial profiling and discrimination by police and fare inspectors. As Metro continues to identify ways to address safety and security for all users on the system, it is important that the agency be mindful of the concerns of African American and Latino users.

Expand Metro's ExpressLane Services. Travel time uncertainty is a significant factor in the decisions that people make regarding which modes to use for their transportation needs. ExpressLanes provide an option to mitigate uncertainties for those who choose to drive. This service is appealing to respondents who desire to control their work trips and avoid unknown factors. ExpressLanes currently operate on I-110 and I-10, but expansion of this program can provide solo drivers with more options for a reliable trip experience as well as improve highway flow for other users.

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Evitarus, Inc. (Prime Contractor)

Kandi Reyes & Associates (Subcontractor)

361 Degrees Consulting (Subcontractor)

REFERENCE

BBC Research & Consulting (2014). *2014 RTD Segmentation Study*.

LA Metro (2016). *Customer Satisfaction Survey*.

Perk, V., Flynn, J., Volinski, J. (2008). *Transit Ridership, Reliability, and Retention*. National Center for Transit Research, Center for Urban Transportation Research.

Transit Center (2016). *Who's On Board 2016: What Today's Riders Teach Us About Transit That Works*.

Transit Center (2016). *Who's On Board 2016: What Today's Riders Teach Us About Transit That Works*. Rider Survey.

APPENDICES

Appendices can be accessed online:

http://libraryarchives.metro.net/DB_Attachments/180103_Attachment%20C_Appendices.pdf

Appendix A – Complete list of survey questions

Appendix B – Outline of the skip logic feature and sequencing of questions

Appendix C – 2017 Customer Satisfaction Focus Groups, Final Report

Appendix D – Overview of the questions and responses used to categorize these user segments

Appendix E – Detailed Summary of Demographic Makeup of Respondents by User Segment

Appendix B: Summary of Outreach

Engaged During Development of Draft Plan
External Stakeholders & Interviewees
Access Services: Andre Colaiace, Executive Director
Accessibility Advisory Committee
Alliance for Community Transit: Laura Raymond
Brian Taylor, Professor of Urban Planning, University of California, Los Angeles, Luskin School of Public Affairs; Director, Lewis Center for Regional Policy Studies; Director, Institute of Transportation Studies; OEI Advisory Board Member
California Department of Transportation (Caltrans): Kome Ajise, Chief Deputy Director; OEI Advisory Board Member
Council of Governments: Gateway Cities COG Board Meeting
Daniel Sperling, Professor of Civil and Environmental Science and Policy, University of California, Davis; Director of Institute of Transportation Studies; OEI Advisory Board Member
David Ulin, Professor of the Practice of English at University of Southern California and author of Sidewalking
Ethan Elkind, Director, Climate Change and Business Program, University of California (UC), Los Angeles & UC Berkeley School Law; OEI Advisory Board Member
Faith Leaders Breakfast
Gil Penalosa, Founder & Board Chair of 8 80 Cities, Chair of World Urban Parks, Gil Penalosa & Assoc.; Ryan O'Connor, interim ED at 8 80 Cities; Amanda O'Rourke, Senior Advisor, Gil Penalosa & Associates
Hilary Norton, Executive Director, Fixing Angelenos Stuck in Traffic (FAST); OEI Advisory Board Member
Investing in Place: Jessica Meaney, Amanda Staples
Jeremy B. Dann, Lecturer in Entrepreneurship and Director, University of Southern California, Case Program; OEI Advisory Board Member
Karen Philbrick, Mineta Transportation Institute; OEI Advisory Board Member
Kim Kawada, Chief Deputy Executive Director, San Diego Association of Governments; OEI Advisory Board Member
LA-Mas: Helen Leung, Co-Executive Director
Los Angeles County Bicycle Coalition: Tamika Butler, Executive Director
Los Angeles County Department of Public Health, Policies for Livable, Active Communities and Environments (PLACE) Program: Jean Armbruster, Director; Chanda Singh, Policy Analyst
Los Angeles Tourism & Convention Board: Adam Burke, Chief Administrative Officer; Patti MacJennett, Senior Vice President, Business Affairs
Mark Kroncke, Partner, Invoke Technologies
Martin (Marty) Wachs, Distinguished Professor Emeritus of Urban Planning, University of California, Los Angeles, Luskin School of Public Affairs; OEI Advisory Board Member
Metro Accessibility Advisory Committee
Metro Chief Executive Officer and Subregional Executive Directors' Meeting
Metro Service Council: Quarterly Meet & Confer
Metro Technical Advisory Committee
Metro Technical Advisory Committee: Bus Operations Subcommittee
Metro Technical Advisory Committee: Local Transit System Subcommittee

Appendix B: Summary of Outreach

External Stakeholders & Interviewees (Continued)
Metro Technical Advisory Committee: Streets & Freeway Subcommittee
Move LA: Denny Zane, Executive Director
Multicultural Communities for Mobility: Anisha Hingorani, Program and Policy Manager
Natural Resources Defense Council: Amanda Eakin, Director, Transportation and Climate
Office of Extraordinary Innovation (OEI) Advisory Board
Paul Curcio, Urban Studies and Planning Lecturer, University of California, San Diego, Urban Studies and Planning; Miralto; OEI Advisory Board Member
Peter Marx, Executive Director, GE Digital; University of California, Los Angeles, Lewis Center and USC Annenberg Innovation Lab; OEI Advisory Board Member
Port of Long Beach: Allison Yoh, Director of Transportation Planning
Port of Los Angeles: Kerry Cartwright, Director of Goods Movement
Rani Narula-Woods, Shared-Use Mobility Center; OEI Advisory Board Member
Ratna Amin, Transportation Policy Director, San Francisco Bay Area Planning and Urban Research (SPUR); OEI Advisory Board Member
Richard Willson, Professor of Urban and Regional Planning, Cal Poly Pomona; OEI Advisory Board Member
Rick Cole, City Manager of City of Santa Monica
Seleta Reynolds, General Manager, Los Angeles Department of Transportation
Southern California Association of Governments: Hasan Ikhata, Executive Director; OEI Advisory Board Member
Southern California Regional Rail Authority: Anne Louise Rice, Assistant Director
Sudipto Aich, Ford Smart Mobility
Susan Shaheen, University of California, Berkeley, Transportation Sustainability Research Center; OEI Advisory Board Member
Trust South LA: Sandra McNeill
Yonah Freemark, Urbanist & Journalist
Metro Board Members & Deputies
Director Carrie Bowen
Director Eric Garcetti
Director Jacquelyn Dupont-Walker
Director Janice Hahn
Director John Fasana
Director Mark Ridley-Thomas
Director Robert Garcia
Director Sheila Kuehl
Metro Board Deputies: Javier Hernandez & Waqas Rehman (On behalf of Director Hilda Solis)
Internal Metro Interviewees
Ad-Hoc Customer Experience Committee
Board Secretary's Office: Michele Jackson, Christina Goins, Collete Langston, Deanna Phillips
Chief Policy Office: Elba Higueros, Jonathan Adame, Claudia Galicia, Aaron Johnson
Civil Rights & Equal Employment Opportunity Team: Dan Levy, Jess Segovia, Jonaura Wisdom
Communication, Community Relations Team

Appendix B: Summary of Outreach

Internal Metro Interviewees (Continued)
Communication, Marketing: Glen Becerra, John Gordon, Lan-Chi Lam, Michael Lejeune, Bernadette Mindiola
Communication, Public Relations: Joni Goheen, Aurea Adao, Ana Chen, Luis Enzunza, Steve Hymon, Rick Jager, Dave Sotero, Jose Ubaldo
Communications Team: Pauletta Tonilas, Glen Becerra, Joni Goheen, Gail Harvey, Ron Jue, Ann Kerman, Jackie Lopez, Vanessa Smith, Michael Turner
Communications, Government Relations: Michael Turner, Raffi Hamparian, Marisa Yeager, Crystall Martell
Communications, Marketing: Glen Becerra, Devon Demining, John Gordon, Lan-Chi Lam, Michael Lejeune, Kevin Pollard
Communications: Pauletta Tonilas, Yvette Rapose, Jodi Litvak, John Gordon
Congestion Reduction Team
Countywide Planning & Development, Active Transportation Team: Laura Cornejo, Robert Machuca, Jackie Su, Brett Thomas, Julia Salinas, Henry Phipps, Jingyi Fan, Alice Tolar, Lia Yim, Tony Jusay
Countywide Planning & Development, Goods Movement: Michael Cano, Akiko Yamagami
Countywide Planning & Development, Long/Short Range Planning: Brad McAllester, Heather Hills, Mark Yamarone, Rena Lum
Countywide Planning & Development, Regional Grants Management Team: Frank Flores, Cosette Stark, James Allen, Diego Ramirez, Vanessa Ward, Ann Flores, Kathy Banh, Emma Nogales, Vincent Lorenzo, Nathan Maddox
Countywide Planning & Development, Shared Mobility Team staff meeting: Dolores Roybal-Saltarelli, Valerie Rader, Neha Chawla, Aaron Voorhees, Kevin Holliday, Jenny Cristales-Cevallos
Countywide Planning & Development, Strategic Financial Planning & Programming: Wil Ridder, Kalieh Honish, Mark Linsenmayer, Herman Cheng, Patricia Chen, Gloria Anderson
Countywide Planning & Development, Sustainability: Diego Cardoso, Jacob Lieb, Katie Lemmon
Countywide Planning & Development, System Analysis/Research: Chaushie Chu, Falan Guan, Paul Burke, Ying Zhu
Countywide Planning & Development, Systemwide Planning: Adam Light, Georgia Sheridan, Cory Zelmer, Rachelle Andrews
Countywide Planning & Development, Transit Oriented Community/Joint Development/Strategic Initiatives/Parking: Jenna Hornstock, Adela Felix, Well Lawson, Frank Ching, Nick Saponara, Greg Angelo, Elizabeth Carvajal
Human Capital & Development, Employee & Labor Relations, Administration: Ashley Martin, Cathy Zhu, Shuyen Lin, Melinda Perrier, Imelda Hernandez, Arnel Abeleda, Flor Anaya
Human Capital & Development, Employee & Labor Relations: Steve Espinoza, Tara Butler, Brendan Adams, Sharde Jackson, Rachael Aguirre, Gabriela De Leon, Kimberlee Vandenakker, Esther Reed, Robert Chavez, Judith Baxter
Human Capital & Development, Talent Acquisition Team

Appendix B: Summary of Outreach

Internal Metro Interviewees (Continued)
Human Capital & Development: Joanne Peterson, Dan Dzyacky, Carmen Mayor, Don Howey, Steve Espinoza, Patrice McElroy, Avis Gibson, Steve Jaffe
Information Technology Services: Dave Edwards, Joe Giba, Bill Balter, Matt Barrett, Doug Anderson, Vincent Tee, Pat Astredo
Management Audit Services Team
Matt Barrett, Manager, Policy Research and Library Services
Office of Management & Budget Team: Nalini Ahuja, David Sutton, Kelly Hines, Conan Cheung, Michelle Navarro, Gwen, Giovanna Gogreve, Tina Marquez, Jesse Soto, Perry Blake, Drew Phillips
Office of Management & Budget, TAP: Robin O'Hara
Operations & Maintenance Team: Jim Gallagher, Diane Corral-Lopez, Jesse Montes, Alex DiNuzzo, John Hillmer, Bob Holland, Dan Nguyen, Frank Alejandro, Bob Spadafora, Bernard Jackson, Conan Cheung, Jesse Montes, Bob Holland, Errol Taylor, Michael Ornelas, Nancy Saravia, Julio Rodriguez
Operations, Bus Maintenance Team
Operations, Maintenance, Non-Revenue: Daniel Ramirez
Operations, Rail Fleet Services: Bob Spadafora, Russell Homan, Fred, Ted, Michael, Arnold, Rick
Operations, Service Development, Service Planning & Scheduling, Regional Service Council: Jon Hillmer, Dan Nguyen, Gary Spivack, Scott Page
Operations, South Bay Division 18
Operations: Division 5 RAP Session
Program Management, Environmental Compliance and Sustainability staff meeting: Emmanuel (Cris) Liban, Alex Cantwell, Heather Severin, Ryan Honda, Dan Rob, Alvin Kusumoto, Dilara Rodriguez, Erika Wilder, Evan Rosenberg, Jesus Villanueva, Kingsley, Shannon Walker, Tom Kefalas, Kyle Lefton, Andrew Quinn, Cody Bricks
Program Management, Highways Program Staff Meeting
Program Management, Program Control: Brian Boudreau, Julie Owen, Amy Wang, Sal Chavez, Paul Briggs, Ferri Ahmadi, Julie Lansford, Richard Mora, Brittany Zhuang, Dennis
Program Management: Abdollah Ansari, Gary Baker, Dennis Mori, Brian Pennington, Tim Lindholm, Rick Meade, Rick Clark, Cris Liban, Charles Beauvoir, Brian Boudreau, Sam Mayman, Pauline Lee
Program Management: Westside Purple Line Project Managers - Dennis Mori and Michael McKenna
Risk Management, Emergency & Homeland Security Preparation: Greg Kildare, Richard, Denise Longley, Juanita (Nita) Welch, Raymond (Ray) Lopez, Dennis, Tim Rosevear, Edward Bagosian, Vijay Khawani

Appendix B: Summary of Outreach

Internal Metro Interviewees (Continued)
Senior Leadership Team: Alex Wiggins, System Security and Law Enforcement; Dan Levy, Office of Civil Rights; Dave Edwards, ITS; Debra Avila, Vendor Contract Management; Diana Estrada, Management Audit; Elba Higueros, Board Relations, Policy & Research; Greg Kildare, Risk, Safety, and Asset Management; Jim Gallagher, Operations; Joanne Peterson, Human Capital & Development; Joshua Schank, Office of Extraordinary Innovation; Karen Gorman, Inspector General; Nalini Ahuja, Office of Management & Budget; Pauletta Tonilas, Communications; Phillip Washington, Chief Executive Officer; Richard Clarke, Program Management; Stephanie Wiggins, Deputy Chief Executive Officer; Therese McMillan, Countywide Planning & Development
System Security & Law Enforcement Staff Meeting: Alex Wiggins, Jennifer Loew, Tinh Quach, Barry Aboltin, Cathie Banuelos, Rivers Jacques, Shawn Khodadadi, Vache Minasyan, Gustavo Ortega, Sanda Solis, Helen Valenzuela, Brandon Wong, Mario Zamorano
Vendor/Contract Management: Debra Avila, Ivan Page, Michael Gonzalez, Selena Landero, Carolina Coppolo, Andrea Arias, Miguel Cabral
Engaged After Draft Plan Released for Public Comment
External Stakeholders & Interviewees
Aging & Disability Transportation Network
Accessibility Advisory Committee
Alma Family Services: Lourdes Caracoza
Automobile Club of Southern California
Commission on Disabilities (Los Angeles County)
First 5 LA: Debbie Sheen, John Guevarra, Roxana Martinez
Investing in Place: Jessica Meaney, Amanda Staples
LA Metro Sustainability Council
Los Angeles Area Chamber of Commerce: Transportation and Goods Movement Council
Los Angeles County Business Federation (BizFed) Transportation Committee
Metro Freight Working Group
Metro Policy Advisory Committee
Metro Technical Advisory Committee
Metro Technical Advisory Committee: Bus Operations Subcommittee
Metro Technical Advisory Committee: Local Transit Systems Subcommittee
Northern Corridor Cities Meeting
Regional Service Councils Quarterly Meet & Confer
Internal Metro Stakeholders
Ad-Hoc Customer Experience Committee



Board Report

File #:2017-0912, **File Type:**Policy

Agenda Number:33.

**REVISED
EXECUTIVE MANAGEMENT COMMITTEE
FEBRUARY 15, 2018**

SUBJECT: METRO EQUITY PLATFORM FRAMEWORK

ACTION: ~~RECEIVE AND FILE~~ APPROVE METRO EQUITY PLATFORM FRAMEWORK

RECOMMENDATION

APPROVE Metro's Equity Platform Framework.

ISSUE

Access to opportunity should be a core objective of public decision making, public investment, and public service - and transportation is an essential lever to enabling that access. Unfortunately, there exists vast disparity among neighborhoods and individuals in Los Angeles County in their ability to see and seize opportunity - be it jobs, housing, education, health, safety or other essential facets of thriving in vibrant, diverse communities. A multi-point equity platform provides a basis for Metro to actively lead and partner in addressing and overcoming those disparities.

Metro staff does not approach the subject of equity lightly or uninformed. The adoption of Measure M included performance metrics that were tied to disadvantaged communities. The major revision to the Long Range Transportation Plan has committed to incorporating equity as a crosscutting issue since its introduction to the Board in February 2017. The Policy Advisory Council has flagged this as a major topic of interest. Most importantly, recent and engaged experience with community members with several projects (i.e., First/Last Mile planning, the Transformative Climate Communities grant for Rail to Rail, and a body of innovative workforce development initiatives) all underscore both the timeliness and urgency that equity considerations bring to Metro's portfolio. In addition, staff informally reached out to representatives from academia, foundations, advocacy organizations and local government in developing this platform. Their demonstrated experience in research and collective action, and their candid feedback on challenges and opportunities in the equity space were invaluable.

DISCUSSION

Metro's multi-point equity platform is wrapped around four pillars.

First, we need to define a common basis for talking about and building an agenda around equity, and how to improve it.

- Equity holds different perspectives and priorities for everyone and anyone who will be part of

this conversation.

- At its core, *inequity* exists when there are fundamental differences in access to opportunity, not just with respect to where you begin, but in your capacity to improve from that starting position.
- Historically and currently, race and class have largely defined where these disparities are most concentrated: in poor, minority communities throughout LA County. Age, gender, disability, and residency also can expand or constrain opportunities.
- It would be presumptuous to begin a truly inclusive conversation with a pre-determined definition of “equity” and all its facets, but Metro can enter into that conversation committing to the following:
 - Establish meaningful goals around a shared definition of equity and actions to achieve those goals.
 - Define metrics to evaluate outcomes and consider redirected actions if needed. It will be particularly critical to infuse equity-based performance metrics in Metro’s investment decisions. These cannot be the only investment considerations. Transportation is rife with tradeoffs. But equity metrics need to be definable, impactful, measurable, accountable, and at the front end of the analysis, not the back end.
 - Seek and invite the diverse range of voices that must participate with Metro in accomplishing the above. Importantly, we need to proactively reach out to those who have remained on the margins of decision-making in the past. These will include historically underserved communities and organizations that represent them. But we must also reach out and hear voices that may not be aligned with established groups.

Second, Metro needs to establish comprehensive, multiple forums to engage the community meaningfully and actively in pursuit of the first step discussed above. An important opening conversation with LA’s community members would address: a) where they believe achieving equity has been problematic - broadly, and specific to transportation’s role; and b) where improved relationships, partnerships and actions aligned with Metro’s portfolio of responsibility can be defined to advance more equitable transportation outcomes going forward.

- This will be a challenging conversation, insofar as it requires the Metro as Board and staff to invite the community to articulate where it has experienced, in fact deeply felt, inequity in Metro’s past. This isn’t a platform for Metro to defend or be defensive; people feel what they feel, and it is going to be impossible to define a new path and build a different position of trust if past experience is not given voice and legitimacy.
- That said, the main point of this conversation forum should be to learn and move forward based on that acknowledgement. This may require reconciling divergent opinions to arrive at some shared goals and actions. Actions going forward may redress past ills - that is to be determined - but they certainly should not repeat them, if at all possible. It is also an opportunity to discuss with community members those initiatives where Metro has actively tackled disparity gaps, such as its growing portfolio of workforce development initiatives.
- Advice and best practices on how to effectively have these community-driven conversations

will be key.

- Metro can start with lessons learned from other cities across the country. San Francisco, Seattle, Oakland and others all have models to tap.
 - These forums would benefit from professional facilitation. Foundations have established several venues that Metro might pivot from (e.g. the on-going national Strong, Prosperous and Resilient Communities Challenge (SPARCC) Initiative includes Los Angeles as a participating city - LA Thrives coalition is the local lead; the California Endowment and others have underwritten numerous initiatives across the County); or seek new support.
- As noted at the outset, Metro consulted with equity thought leaders whose advice informed the core of this platform. Retaining this cross-sectional consultation will be critical to successfully implementing a platform that requires dedication and time. In particular, the community forums envisioned will benefit from a circle of demonstrated leaders. We certainly don't hold all the keys on issues, and making use of the rich resources around us is essential.
- A key step will be to establish a formal or informal advisory group supporting the equity platform, and to incorporate, as appropriate, the equity agenda into existing advisory groups.
- In addition, the following initiatives are also suggested:
- Actively develop and invest in a Community Based Organization (CBO) oriented public engagement program. This approach may not be applicable to every Metro investment, program or activity located in, or otherwise impacting, LA County's historically underinvested (HU) communities. As stated above, we must be mindful that any single group does not represent all voices in every community. However, this approach should be added to and implemented as part of our public process, if we are going to establish and maintain legitimacy within impacted communities when addressing equity issues that they themselves are experiencing directly.
 - Invest in the transportation technical capacity of local governments that serve HU communities. Metro cannot and should not be the sole partner in all transportation or transportation-impacted decisions, legally or practically. And traditional funding and regulatory programs in particular assume effective participation by local jurisdictions. In short, strengthening cities that are home to equity communities is probably a core requirement for a more equitable County. This assistance can range from delivering transportation improvements swiftly and effectively to competing for discretionary funding more successfully; to better supporting more community-inclusive decision-making around transport investments.

Third, the Long Range Transportation Plan (LRTP) must have a concentrated focus on equity. There are two major arenas for that focus to take root.

Where Metro **Leads**

- First and foremost, we must tackle impacts of the LA County's transportation system under our

direct responsibility via Metro's role as transportation planner, operator, builder and funder. As such, equity is a "cross cutting" principle that will be applied throughout the LRTP's development, as reported to the Board in prior presentation's on the Plan's design and rollout.

- Critically, what we choose - or do not choose - to invest in that system is paramount. Over the 40-year span of the LRTP, a considerable amount of funding controlled by Metro is legally or legislatively dictated, such as Measure M. It should be noted that equity related factors were considered as part of the 5 performance measures developed to assess and prioritize Measure M's expenditure plan projects. Specifically, the "Economy" and "Sustainability/Quality of Life" themes included metrics attached to investments in disadvantaged communities. But while there are important additional equity considerations Metro can assess as projects are implemented, there are practical limitations to rethinking or redirecting certain funds that are statutorily prescribed.

However, a significant amount of funding in the long range plan is not yet locked down for 40 years, allowing us to reassess current patterns of investment and either reaffirm them or change them.

- These investment decisions should be based on performance outcomes and, as presented here, front and center considerations should be given to those that actively:
 - advance outcomes that promote and sustain opportunities in underserved communities; or
 - avoid outcomes that lead to or aggravate disparities in opportunity in those communities.
- Notably, investments must be made to operate, maintain and rebuild the existing transportation system, in addition to expanding it. The community's ability to access that transportation system - where, when, how, and at what cost - impacts their opportunities to jobs, housing, education and health. Thus, measuring equity against that access, and for whom, is central to our planning process.
 - In this realm, there will be several, discrete transportation activities that will be developed alongside the LRTP where equity will be front and center: any discussion of "right sizing" fares, redesign of the Metro bus system, our continuing work in Work Force Development and small business support, to name a few.
 - The Long Range Transportation Plan will not duplicate analysis and recommendations in these areas. It will incorporate goals, decisions, and any actions attached to all of them, and will likely help facilitate equity-driven discussions in each of them.
 - These issues address critical transportation access concerns, and will be important venues for coordinating community involvement.

Where Metro **Partners**

- Beyond its core transportation responsibilities, there will be an expectation to take on a new, countywide, visible equity challenge: the Metro transport system's interface with gentrification/displacement/affordable housing.

- Neighborhoods throughout the county are facing escalating housing costs, real estate developments that are reshaping community culture, and in both cases, frequently forcing existing residents into painful relocation or transportation decisions. Gentrification/displacement/affordable housing is a common thread of concern among elected officials and advocates. And it hits every corner of the County.
- Metro cannot address this subject by ourselves - it will require active partnerships with others, such as the County, cities, Council of Governments, private sector and business as well as community representatives. Foundations are extremely interested in this arena and could bring valuable resources to the table.
- Among other considerations, these issues underscore the complexity of equity concerns and the necessarily complex response to them. By taking up a big problem - but not Metro's problem alone - it gives us the space to explore, experiment and advance change while building necessary partnerships at the outset.

Fourth, we need to pursue equity training within Metro. Successfully setting and delivering on a new equity agenda requires "top to bottom" ownership throughout the agency.

- In recent years, there has been a growing body of equity training designed for governmental agencies. LA County departments have deployed these programs, among others. We intend to explore options and commit to internal education that would be required at certain levels and positions.
- Training would be in two important areas:
 - Methods to evaluate equity including data collection, measurement and analysis; and
 - Approaches to effectively communicate and work with communities in a manner that recognizes and respects equity issues.

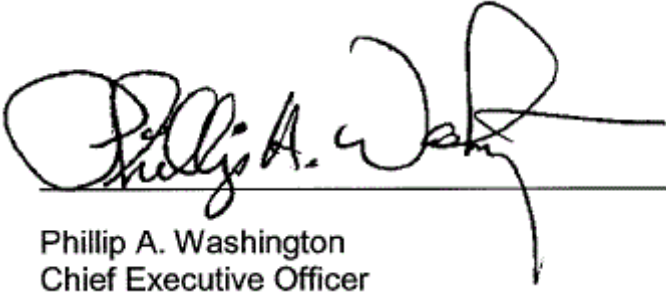
This platform is a starting point, and should be considered a working outline that can be adjusted with experience and feedback. The commitment expressed herein, however, should be a guiding constant - for Metro, our transportation partnerships, and the people we serve.

NEXT STEPS

Staff will proceed to use the Equity Platform as a framework for specific analyses and actions attached to Metro initiatives, as outlined in this report. Progress will be reported periodically to the Board, particularly as it relates to key plans and programs underway, such as the Long Range Transportation Plan.

Prepared by: Therese W. McMillan, Chief Planning Officer, (213) 922-7077

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



Phillip A. Washington
Chief Executive Officer

METRO TRANSIT ORIENTED COMMUNITIES POLICY

I. POLICY CONTEXT

Traditionally transit agencies have focused their mission on a combination of planning, constructing, and operating the public transit system with a focus on moving people from station to station within that system. Community impacts associated with the transit system, both positive and negative, were relegated to local jurisdictions to manage, promote or mitigate. Since the development of the last Long Range Transportation Plan, and with the passage of Measure R in 2008 that started a massive investment in public transportation in Los Angeles County, it has become evident that the regional serving transit systems we plan, construct, and operate has a tremendous impact on the communities we serve. These investments and services can:

- Result in targeted economic development/real estate investments or disinvestments
- Change the perception of a community as a desirable place to live or work, both positively and negatively
- Provide mobility and thus enhance access to jobs, schools, health care and economic mobility
- Accelerate change to the character and cultural cohesion of a community, in both positive and negative ways

Los Angeles made clear its commitment to continuing dramatic growth of its transit system in 2016 when voters approved Measure M and an additional \$120 billion in investment over 40 years. This investment will only be successful if Metro considers: issues of access and connectivity to the system (such as first/last mile connections); a deep understanding of the demographics of the customer base (to target and adjust service); safety, timeliness and consistency of service; and the impact of the system on issues of equity and equitable opportunity in the County. It is imperative for Metro to consider community wide impacts in its planning, development, operations and third-party funding.

To achieve this integrated goal of transit expansion and consideration of community impacts, Metro must forge partnerships with the municipal partners and local communities we serve. One of the most significant ways Metro can understand, define and measure both the possibilities and the impacts of its investments in public transit is to develop policies and procedures that promote Transit Oriented Communities (TOC)s, as a path for communities to maximize the benefits of Measure M investments. This TOC Policy is a step toward defining Metro's goals in how we consider, fund, enable,

and/or incentivize activities that support the development of balanced communities throughout Los Angeles County.

II. PURPOSE

The purpose of this policy is to:

- a. Define the concept of TOCs for Metro and develop the goals and objectives of Metro's approach to enabling TOCs.
- b. Define those "TOC Activities" that will be considered a "transportation purpose" and thus are eligible activities for funding under the Measure M guidelines, by Metro and by its municipal partners through Local Return.
- c. Establish a set of criteria to determine which TOC Activities Metro will fund and implement directly and which activities Metro will allow, enable and incentivize local partners to fund and implement.

III. DEFINITIONS

Transit Oriented Communities: Transit-Oriented Communities (TOCs) are places (such as corridors or neighborhoods) that, by their design, allow people to drive less and access transit more. A transit oriented community maximizes equitable access to a multi-modal transit network as a key organizing principle of land use planning and holistic community development. TOCs differ from Transit Oriented Development (TOD) in that a TOD is a specific building or development project that is fundamentally shaped by close proximity to transit.

TOCs promote equity and sustainable living in a diversity of community contexts by: (a) offering a mix of uses that support transit ridership of all income levels (e.g. housing, jobs, retail, services and recreation); (b) ensuring appropriate building densities, parking policies, and urban design that support accessible neighborhoods connected by multi-modal transit; (c) elevating vulnerable users and their safety in design; and (d) ensuring that transit related investments provide equitable benefits that serve local, disadvantaged and underrepresented communities¹.

¹ For the purposes of this Policy, where Metro identifies disadvantaged and underrepresented communities, included are lower income households as well as households under the following protected categories as defined by the California Fair Employment and Housing Act (FEHA): race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age for individuals over forty years of age, military and veteran status, and sexual orientation.

High Quality Transit Stop (HQT): an existing or environmentally-cleared fixed-guideway transit station or the intersection of two buses with 15 minute headways, or fewer, at the peak. Stops may be served by any transit operator. A planned fixed-guideway station may also be considered if its location is the only alternative under consideration for a transit corridor in the planning stages. This definition may change to match changes in the State of California definition of a High Quality Transit Stop. HQTs may be referred to herein as “Stops”.

Geographic Boundaries of TOC: The span of Metro’s TOC program is LA County, with targeted activities, programs and projects: (1) generally, across the County; (2) within 3-miles of a Stop; and (3) within a half mile of a Stop.

TOC Activities: Activities identified in this policy that support, enable and incentive TOCs, and thereby serve a transportation purpose.

Affordable Housing: The California Department of Housing and Community Development (HCD) and the Federal Department of Housing and Urban Development (HUD) define affordable housing as housing for households earning 80% of the area median income (AMI) and below. This Policy specifically targets households earning 60% of AMI and below, a lower income level than HCD and HUD. In this Policy Affordable Housing is defined as covenanted, income-restricted, housing for households earning income 60% of AMI or below.

Income levels are further defined as:

- Extremely low income: 0-30% of AMI
- Very low income: 30% to 50% of AMI
- Low income: 50% to 60% of AMI; the term may also be used to mean 0% to 60% of AMI

Low-income Households: This policy considers Low-income Households to be households earning annual income at or below 60% of the area median income (AMI).

Small Business: a business that is independently owned and operated and adheres to the size standards established by the U.S. Small Business Administration (SBA in terms of the average number of employees over the past 12 months or the average annual receipts over the past three years. These standards are defined at the following link:

[SBA Size Standards Table.](#)

IV. GOALS

The TOC Policy will set direction for how Metro plans and implements new and existing transit corridor projects, for supporting land use and community development around existing transit corridors, and for encouraging and incentivizing partners to pursue the same goals. Specific TOC Goals include (*in no particular order*):

1. Increase transportation ridership and choice

- **Ridership:** Increase system ridership and promote usage of alternate, non-motorized, modes of transportation.
- **Transportation Options:** Leverage land use and urban design to encourage non-single occupant vehicle transportation options both on and off Metro property, through enhanced first/last mile options, travel demand management, and seamless transit connectivity.
- **Safety:** Work to reduce collisions and create welcoming environments for all ages, abilities and protected classes in the planning, construction, and operation of transit oriented community projects.

2. Stabilize and enhance communities surrounding transit

- **Housing Affordability:** Prioritize development and preservation of transit-adjacent Affordable Housing.
- **Neighborhood Stabilization:** Protect and support local residents and businesses from displacement.
- **Sustainability:** Ensure that infrastructure investments are multi-beneficial, both improving access to transit and improving communities' environmental resilience.
- **Economic Vitality:** Promote sustained economic vitality directly benefiting existing communities.

3. Engage organizations, jurisdictions, and the public

- **Community Engagement:** Ensure that stakeholders across a broad spectrum, including those that are harder to reach through traditional outreach strategies, are meaningfully engaged in the planning, construction and operation of Metro's transit system.
- **Foster Partnerships:** Through planning, coordination, policy advocacy and funding, foster relationships and partnerships with local residents and businesses, municipal and institutional entities, community based

organizations, workforce development providers, the private sector, and philanthropy, to realize TOC goals.

4. Distribute transit benefits to all

- **Equitable Outcomes:** Ensure transportation investments and planning processes consider local cultural and historical contexts and improve social, economic, health, and safety outcomes that serve and benefit local, disadvantaged and underrepresented communities.
- **Complete Communities:** Promote and realize complete communities that support a mix of incomes, land uses, transportation choices, and equitable access to safe, sustainable and healthy living.
- **Small Business:** Encourage the utilization of small businesses in the contracting opportunities generated by Metro’s investments.

5. Capture value created by transit

- **Value Capture:** Capture increased value of properties surrounding Metro’s transit investments and re-invest that value into TOC activities.

V. TOC ACTIVITIES

Transportation Purpose

Metro can only fund activities deemed to have a transportation purpose. If that transportation purpose is not otherwise explicitly defined in existing Metro policies or guidelines, the Board must make a finding that the activity has a transportation nexus. The Metro Board adoption of this Policy will represent that finding, deeming the TOC Activities in this Policy to have a transportation purpose.

TOC Activities are consistent with responsibilities outlined in Metro’s enabling statute in the California Public Utilities Code Section 130001:

“(e) The Transportation system should offer adequate public transportation to all citizens, including those immobilized by poverty, age, physical handicaps, or other reasons,” and “(h) Transportation planning should recognize that transportation systems have significant effect on the physical and socioeconomic characteristics of the area served, and emphasis should be given to the protection and enhancement of the environment and restoration of blighted neighborhoods near community centers.”

TOC Activities by Geography

TOC Activities funded with Metro transportation funds must be within Los Angeles County. Some TOC Activities are general and may not be targeted around one particular High Quality Transit Stop (“Stop”), and others must take place, or be targeted within a half mile of the Stop (often referred to as the walk-shed) or within 3 miles of the Stop (often referred to as the bike-shed). References to “walk-shed” and “bike-shed” are not limited to walking and biking, but include rolling or other alternate modes of mobility. Eligible TOC Activities are characterized by these geographic requirements below.

General activities –

- Community engagement that targets harder-to-reach communities around/regarding TOC Activities or transit
- Events or programs that promote multi-modal transit options
- Discounted transit passes
- Grants and/or technical assistance to support projects and programs that achieve TOC goals
- Staffing or consultants that can implement TOC Activities
- Transportation related workforce training and education

Within 3 miles of a Stop –

- First/last mile improvements
- Complete Streets
- Land use planning that promotes TOC goals.
- Value capture studies and formation activities that support investment in TOCs. A value capture district must include at least one transit Stop but may span a broader radius around that Stop.

Within a half mile of a Stop –

- Public improvements that create stronger and safer connections to transit and improve the transit rider experience recognizing vulnerable users and their safety in design.
- Affordable Housing: Programs that produce, preserve, and protect affordable housing through:
 - Preservation or development of Affordable Housing units.
 - Innovative anti-displacement strategies to protect and retain Low-income Households.
- Small business preservation: Programs that support and protect small businesses.
- Neighborhood-serving amenities: Programs that preserve, protect and/or produce neighborhood-serving amenities.

VI. ADMINISTRATION

Implementation

Most of the TOC Activities outlined in this Policy will be implemented by municipalities and other eligible partners through Local Return or other eligible transportation funding programs, subject to the legal requirements and/or specifications of those funding programs. Some activities Metro will fund, enable or incentivize through its existing programs, planning work, policies and discretionary funding offered to partners.

Metro will only implement TOC Activities directly if they are within Metro's functional jurisdiction. Specific programs with the objective of meeting TOC goals may be implemented across various Metro departments.

Compliance with Funding Requirements

TOC Activities funded by Metro and implemented by municipalities and eligible partners must follow the legal requirements, specifications, guidelines and administrative procedures of the applicable funding program and will be subject to any specific limitations that may apply to those funding sources, including matching requirements. Using transportation funds for a TOC Activity may require the implementing entity to provide a clear description of the TOC Activity and how it furthers the TOC Policy Goals defined in Section IV. If municipalities do not pass audits, they may risk losing future funding opportunities.

Transparency and Accountability

With adoption of the TOC Policy, Metro will establish a TOC Implementation Plan that will include performance metrics. Thereafter, staff will prepare an annual TOC report.