

King County Metro Transit

Scoping Document for Metro's Framework for the Equitable and Sustainable Implementation of Mobility

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Prepared for:
King County Council

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Executive Summary

As a mobility agency, King County Metro Transit moves people throughout King County. It is our duty to provide mobility opportunities to all people in the county in a way that supports healthy communities, a thriving economy, a sustainable environment, and equity and access to opportunities. With Motion 15253, the King County Council directed Metro to build on existing work and develop a **framework for the equitable implementation of mobility services**.

In this framework, Metro will identify guiding principles that support equity and sustainability and propose actions, based on best practices, to improve outcomes for King County's priority populations¹ and reduce greenhouse gas emissions from transportation. **Metro's goal is to help align our funding, policies, and investments to deliver livable communities, a thriving economy for all, and a sustainable environment.** This framework will inform Metro's budget development and updates to policy documents. Topic areas explored will include, but are not limited to, those required by Motion 15253: fixed-route and innovative mobility services, emerging technologies, policies for the allocation of public space, and workforce trends. Metro will engage communities, elected officials, and other stakeholders in developing the framework. Metro and the King County Executive anticipate transmitting it to the Council by October 31, 2019. Metro and the Executive are also transmitting a supplemental budget request to ensure we have adequate resources directed to this effort.

Metro will use the same process to undertake the analysis and engagement required by Motion 15252, which asks the Executive to convene a regional planning effort to address the implementation of METRO CONNECTS, Metro's long-range plan, and develop a regional funding plan. Our overarching goals for both efforts are:

- To ensure our policies, investments, services, and programs put people first, support the advancement of equity, racial and social justice, meet the mobility needs of the county, and reduce regional greenhouse gas emissions.
- To develop an ambitious yet realistic plan to fund and implement METRO CONNECTS in a way that advances equity, racial and social justice, and addresses climate change.

Metro will update the King County Strategic Plan for Public Transportation and the Service Guidelines in 2020, in alignment with the framework and the METRO CONNECTS vision. The framework will articulate next steps and a proposed timeline for updates to METRO CONNECTS. Finally, recommendations will inform updates to the 2020 Strategic Climate Action Plan and be the foundation of the updated Pro-Equity Transportation & Mobility Policy Agenda of the Equity and Social Justice Strategic Plan. Though staff working on the mobility framework and income-based fare approach are coordinating, Metro will handle the income-based fares work separately, as 2019-2020 budget proviso #P3 (ER 3 and 4) requires transmittal of a plan for an income-based fares program by September 2019 and implementation of the program by March 2020.

¹ Communities of color, immigrants and refugees, low-income populations, and limited English-speaking communities

Introduction

This scoping document responds to Motion 15253, adopted by the King County Council with the 2019-20 budget, which requires:

A. The Metro transit department, under the leadership of the executive and working in coordination with the council, should begin a planning effort during 2019 to develop a framework for the equitable implementation of innovations in transit service and mobility.

B. The framework should include, but is not limited to:

- 1. A review of emerging technologies and local and national best practices;*
- 2. Analysis of potential implications for the Metro transit department and opportunities to coordinate mobility innovations with fixed-route and other services;*
- 3. Coordination with the regional planning, coordination and funding efforts to address the implementation of METRO CONNECTS, consistent with the strategy identified in Proposed Motion 2018-0542;*
- 4. Outreach and engagement with regional partners, transit riders and local communities, including but not limited to low-income populations, communities of color, immigrants and refugees, and limited English speaking populations;*
- 5. A review of potential policies for the allocation of public space, including streets, sidewalks, transit stops and station areas, focused on efficiency and equity of use;*
- 6. A review of industry-wide workforce trends, including the potential implications of new mobility options on labor needs, career opportunities, recruitment, training and economic prospects of transportation workers;*
- 7. Guiding principles that will inform the framework development work, including putting people first; and*
- 8. Potential revisions and updates to countywide public transit documents including but not limited to the Strategic Plan for Public Transportation, the King County Metro service guidelines and the METRO CONNECTS long-range plan.*

C. Metro Transit should develop a scoping document outlining the proposed coordination with the regional planning effort outlined in Proposed Motion 2018-0542, as well as the timeline, expected work tasks and budget to develop the mobility framework, and should file this scoping document by April 18, 2019, in the form of a paper original and an electronic copy with the clerk of the council, who shall retain the original and provide an electronic copy to all councilmembers, the council chief of staff and the lead staff for the regional transit committee and the lead staff of the mobility committee, or its successor.

Goal of Mobility Framework

Metro's efforts to deliver equitable, sustainable, integrated mobility solutions and achieve the METRO CONNECTS vision are underway. Metro aims to achieve a "Transit at the Center" mobility ecosystem, in which fixed-route transit moves many people over longer distances and along the busiest corridors, while new mobility options complement these transit routes by delivering first and last mile connections and service in low-density areas.

Metro embraced structural change (becoming a department) and strategic change (reorganizing as a mobility agency) to position ourselves to respond to growing and changing demand by expanding fixed-route service and embracing changes in the transportation industry equitably and sustainably. Appendix A, "Metro's Strategy for Delivering More and Better Mobility Solutions," and Appendix B, "Becoming a Mobility Agency," articulate our strategies.

Taking the next steps to develop a mobility framework requires consideration of policy and budget implications and tradeoffs, including but not limited to:

- How can we prioritize Metro's investments and design policies and budget proposals to deliver livable communities, a thriving economy, and a sustainable environment?
- How can King County partner to promote land use and urban design that encourages transit use, reduces transportation emissions, and provides for affordable, equitable, transit-oriented development options while preventing displacement and gentrification?
- Given that much of King County's public right-of-way is controlled by jurisdictional partners, how can we partner to implement improvements that will increase people's access to transit and promote speed and reliability of transit vehicles?
- How can we embrace innovation while ensuring new mobility solutions are safe, equitable, accessible, sustainable, and complementary to fixed-route transit?
- How can we use new technologies to reduce greenhouse gas emissions from transportation and support a healthier environment for King County residents, prioritizing those who are most impacted by health inequities?
- How can we ensure our workforce equitably benefits from higher-skill, higher-wage opportunities created by the mobility transformation?
- How do we become a leading employer that increasingly represents the racial, cultural and economic diversity of our region, at all levels of our workforce?
- How can Metro contribute to reducing regional transportation emissions from residents?
- How can we better engage King County's priority populations (communities of color, immigrants and refugees, limited English-speaking communities, and low-income populations) on service and product changes?
- How can Metro ensure infrastructure investments align with community priorities?

Motion 15253 gives Metro the opportunity to build on existing work and address such considerations equitably and sustainably. **Metro's goal is to develop a framework that helps align our transportation funding, policies, and investments in services and programs to deliver key outcomes: livable communities, a thriving economy that works for everyone, and a sustainable environment.** The framework will set Metro up to invest upstream and where

the need is greatest, as directed by King County’s Strategic Plan for Equity and Social Justice, and address climate change. This approach will help improve prosperity for all. We look forward to engaging with communities and elected officials throughout our region to develop this framework and consider major policy questions and tradeoffs, so our region can thrive as we embrace new mobility innovations.

The framework will drive changes to the Strategic Plan for Public Transportation, Service Guidelines, METRO CONNECTS, the Strategic Climate Action Plan, and the Pro-Equity Transportation & Mobility Policy Agenda of the Equity and Social Justice Strategic Plan. It will also influence Metro’s budget development and strategies for designing and investing in programs and services. The framework will aim to articulate recommended actions that support Metro’s ability to:

- Increase equitable opportunities for those who live and work across King County, focusing on King County’s priority populations, creating benefits for all.
- Prioritize access to education, jobs and services that allow residents to fulfill their full potential and thrive.
- Assess the immediate needs of priority populations, including through direct engagement of communities to define their needs via community-led decision making.
- Identify strategies for investing in service and infrastructure that advance equitable mobility outcomes for priority populations and reduce residents’ reliance on single occupant vehicles, therefore reducing greenhouse gas emissions.
- Continue to improve accessibility options for people with disabilities.
- Complement King County’s investments in equitable transit-oriented development, support efforts to minimize displacement and support dense land-use development.
- Identify strategies to use incentives, land-use designations, urban design, comprehensive plans, and zoning to create mixed-use compact land use development and community design that meets the needs and preferences of transit users, pedestrians, and bicyclists.
- Assess, evaluate and compare strategies for Metro Transit and partners to reduce regional greenhouse gas emissions from transportation by reducing vehicle miles traveled and facilitating sustainable transportation choices such as public transit, ridesharing, walking and bicycling. Specifically, develop strategy for successfully achieving regional emissions reduction goals².
- Use tools to analyze and evaluate transportation modes based on their ability to enhance mobility, reduce vehicle miles traveled and single occupancy trips, improve health equity, increase economic opportunities for priority populations, and align with Metro’s mission.
- Value and equitably apply qualitative data and new data sources when planning, in addition to traditional quantitative metrics of measuring transit performance.
- Incorporate metrics that include and accurately measure Metro’s progress towards key equity and sustainability outcomes, like reducing single occupancy vehicle trips.

² The goals are a 50 percent reduction by 2030 and 80 percent by 2050, compared to 2007, and vehicle miles traveled reduction goal of 20 percent by 2030, compared to 2012

Meaning of Equitable and Sustainable Mobility

Metro and our community must define equitable and sustainable mobility in order to deliver it. This section describes current thinking around the definitions of equity and sustainability in the context of the mobility framework. Current thinking may be altered and/or enhanced by community engagement activities.

Equity

For many, King County is a great place to live, learn, work, and play. Yet we have deep and persistent inequities—especially by race and place—that in many cases are getting worse and threaten our collective prosperity. We understand that how we approach our work is just as important as what we seek to accomplish. The King County Strategic Plan for Equity and Social Justice commits us to being pro-equity, which means being racially just and inclusive, and consistently taking action to eliminate the root causes of inequities. We are intentionally leading with racial justice to confront the historical and racial inequities that continue to exist in our community and our organization. These racial inequities harm all of us, and our region’s ability to live well and thrive.

Transportation is more than an essential public service. It is a human right - the absence of which impacts human dignity and access to the opportunities needed to thrive in our society. Social mobility depends on access to mobility services. Effective transit service and infrastructure are vital for sustaining and supporting communities. Metro must be a regional leader in taking down barriers to equitable mobility. Metro’s framework will advance recommended actions that support mobility-related equitable outcomes for all residents of King County.

Sustainability

The mobility framework will focus on addressing climate change by reducing greenhouse gas emissions from transportation emissions. Climate change threatens the health and safety of people, the economy, and environment, locally and globally – and priority populations often bear the greatest burden. In King County, we are no longer predicting the impacts of climate change – we are experiencing them. Transportation emissions make up 36 percent of countywide greenhouse gas emissions. The 2015 King County Strategic Climate Action Plan established goals to reduce community-wide greenhouse gas emissions; 25 percent by 2020, 50 percent by 2030, and 80 percent by 2050, compared to a 2007 baseline. King County is not on track to achieve this community-wide goal nor related measures, though there are signs of progress.

In 2019, King County began work to update the Strategic Climate Action Plan. The Executive will transmit the 2020 Strategic Climate Action Plan to the King County Council in June 2020. Through the development of the mobility framework, Metro will consider how our current state supports our greenhouse gas emissions reduction goals, as well as best practices and recommended actions to move more rapidly to meet the goals of the Strategic Climate Action Plan. This work will inform the 2020 update of the Strategic Climate Action Plan.

Framework Outline

Metro staff will develop this framework with the assistance of a consultant team. In its final form, Metro's framework for the equitable and sustainable implementation of mobility will be a report that likely includes:

- 1) Executive summary
- 2) Guiding principles for the equitable and sustainable implementation of mobility*
- 3) Travel trends and high-level analysis of mobility needs throughout our region
- 4) Existing conditions, best practices review, and opportunities and implications for Metro* (likely organized by topic area³). The areas mentioned below reflect current thinking but are subject to change.
 - a. Services, including fixed-route, flexible, innovative mobility, and how Metro evaluates the investment needs*
 - b. Capital, including base capacity, speed and reliability, and RapidRide infrastructure improvements
 - c. Multimodal customer experience, including emerging technologies* and facilities integration to improve transfers, enhance customer amenities, and intensify the fixed-route network
 - d. Policies for the allocation of public space*, including streets, sidewalks, transit stops and station areas, and right-of-way
 - e. Land use policies and zoning patterns, including housing affordability and the promotion of equitable transit-oriented development
 - f. Workforce trends,* including how we can position our current and future workforce to benefit from jobs created in the mobility transformation
 - g. Transit accessibility, including access to transit and fares⁴
 - h. Outreach and engagement*
- 5) Recommended actions, including updates to Metro policies (Strategic Plan, Service Guidelines, METRO CONNECTS, and Strategic Climate Action Plan), services, programs, and investment strategies, informed by engagement with elected officials, communities most impacted by inequities, and other stakeholders

**Required by Motion 15253, Section B*

Guiding Principles

Motion 15253 requires that Metro's mobility framework include guiding principles.

Recommended actions in the mobility framework will align with these principles. Metro will engage with communities, elected officials, and other stakeholders to shape the final principles. Metro has developed the draft principles below to begin the engagement process. **They reflect**

³ Each topic area will likely include a concise summary for each section (existing conditions, best practices, and opportunities and implications). Those summary sheets will highlight how policies, services and/or programs, and high-level investment strategies impact equitable mobility and Metro's ability to confront climate change.

⁴ The framework will consider fares at a high-level, given the significant separate effort to develop an income-based approach to fares.

current thinking but will change throughout the engagement process and development of the mobility framework.

1. **PUT PEOPLE FIRST:** Use authentic, inclusive, and community-driven approaches to ensure that regional mobility options are people-focused and serve priority populations in a way that works for them. Provide mobility choices that connect people with what they need and value, when and how they need it. Advance public transit options that align with specific equity outcomes and allow people to reach their full human potential.
2. **INVEST WHERE NEEDS ARE GREATEST:** Create affordable, effective, accessible and targeted people-centered improvements in transit and mobility services. Invest in related infrastructure improvements upstream and where needs are greatest, with a goal of achieving measurable equity outcomes.
3. **PROMOTE PARTNERSHIPS:** Promote sustainable and resilient partnerships with communities, jurisdictions, transit agencies, private firms, and other modes of transportation, understanding that Metro cannot advance equitable and sustainable outcomes alone. Partnerships should enhance mobility, especially for priority populations.
4. **ENCOURAGE ACCESSIBILITY:** Work with jurisdictions to encourage effective, coordinated land use and public space investments (such as improvements to sidewalks, streets, transit stops, and station areas) that prioritize enhanced access to mobility options, as well as affordable housing and increased density.
5. **IMPROVE AFFORDABILITY:** Partner to provide affordable access to opportunities, especially for priority populations, and support efforts to minimize displacement.
6. **RESPOND EFFECTIVELY TO INNOVATION:** Pilot innovative new mobility partnerships, transit priority measures, customer amenities, and emerging technology services that are centered in equity and put people first. Develop effective responses to private-sector innovations. Incorporate national best practices for achieving equitable and sustainable outcomes through new mobility.
7. **INCREASE SUSTAINABILITY:** Continue working to reduce demand for single-occupancy and high-emissions transportation modes, thereby helping King County achieve its greenhouse gas emissions reduction goals.
8. **SUPPORT OUR WORKFORCE:** Partner with employees, labor, and communities to enable our workforce to take advantage of high-skill, high-wage opportunities created through the mobility transformation.

Framework's Relationship to Policy & Planning

Coordination with METRO CONNECTS Regional Planning (Motion 15252)

In January 2017, the King County Council passed Ordinance 18449, which adopted METRO CONNECTS, Metro's long-range plan. METRO CONNECTS, which was developed with input from transportation stakeholders, partner jurisdictions, riders, members of the Regional Transit Committee, and the County Executive and Council, defines an aspirational vision for a 70 percent increase in bus service and the supporting capital infrastructure needed to accommodate forecasted growth.

METRO CONNECTS identifies key challenges and needs, including population and economic growth, demographic changes, funding, the environment, customer service and satisfaction, increasing access to transit, the need to support service with capital, an evolving transportation system, and the emergence of new technologies. However, METRO CONNECTS is not fully funded, and its vision of transit service cannot be fully realized without further and successful efforts to identify appropriate funding sources.

In response to the need for a regional planning effort to coordinate next steps and funding efforts to address the implementation of METRO CONNECTS, the Council passed Motion 15252 in November 2018. The motion asks the Executive to coordinate with the Council to initiate a regional planning effort during 2019 to address the implementation of METRO CONNECTS; to prepare updated information to supplement METRO CONNECTS to adjust for increased population growth, increasing regional congestion, inflation and construction costs, regional mobility needs, and innovations in transportation; and to work with the Council to develop a regional funding plan to implement METRO CONNECTS and meet the needs of the county's transportation infrastructure.

Work on the tasks required by Motion 15252 is progressing. The consultant team engaged to provide assistance with the framework for the equitable implementation of mobility will also update the transportation planning model that informed METRO CONNECTS based on population growth and increasing congestion, and will also prepare an analysis of updated service and capital costs. This information will be used to undertake financial modeling to determine needs above current resources and develop funding package options for consideration.

Metro staff and the consulting team will also do analysis to learn more about the needs of communities with respect to the transit network and engage with communities and elected officials regarding Metro's guiding principles and future policy updates. As requested by Motion 15252, the Executive will transmit a report on the regional planning and funding effort to the Council by May 31.

[Framework's Relationship to Existing Transit Policy Documents](#)

Motion 15253 requires that the framework include "potential revisions and updates to countywide public transit documents including but not limited to the Strategic Plan for Public Transportation, the King County Metro service guidelines and the METRO CONNECTS long-range plan." Given this direction, Metro expects the framework, as well as the regional planning effort, to inform future updates to our policy documents.

As mentioned previously, the framework will articulate recommended next steps related to Metro's policy, programs, services, and investments. These recommendations will be the foundation of the updated Pro-Equity Transportation & Mobility Policy Agenda of the Equity and Social Justice Strategic Plan. Metro will update the Strategic Plan for Public Transportation and the Service Guidelines in 2020, in alignment with the guiding principles and identified next steps. These updates will also include required revisions to provide more clarity on the meaning of partnerships and align the Service Guidelines with the METRO CONNECTS service network, as directed by the Council in Motion 15094. Revised policy documents are anticipated to be

transmitted to the Council no later than June 30, 2020. This will address the need to update the Strategic Plan before it expires in 2021.

The framework will also articulate next steps and a proposed timeline regarding updates to METRO CONNECTS. As mentioned previously, some of the analysis done for and recommendations articulated in this framework will inform the 2020 update of the Strategic Climate Action Plan. Finally, Metro is concurrently engaging with community partners to develop an income-based approach to transit fares, with the goal of reducing the barrier of cost for low-income residents. In response to 2019–2020 budget proviso #P3 (ER 3 and 4), Metro will submit an implementation report to the Council by September 2019 and will implement the program by March 2020. Given this significant separate effort, the framework will consider fares at a high level and coordinate community engagement efforts.

Work Tasks & Plan for Completion

Metro staff will accomplish the work needed to prepare the framework with the assistance of a consultant team. Outreach and engagement with local communities, with a focus on low-income populations, communities of color, immigrants and refugees, and limited English-speaking populations, and regional partners and transit customers will guide this work.

Metro is securing consultant assistance in four substantive areas: review of existing conditions, best practices, and opportunities and implications for Metro; community engagement; and document development support. Key tasks for the consultant team, which will be directed and coordinated by Metro staff, are:

Travel trends and mobility analysis, which will include an update of demographic trends, including job and population growth, and an analysis of the mobility, equity, and greenhouse gas implications from those trends.

Review of existing conditions, best practices, and opportunities and implications for Metro. Motion 15253 asks that the framework include a review of emerging technologies and local and national best practices; analysis of potential implications for Metro and opportunities to coordinate mobility innovations with fixed-route and other services; a review of potential policies for the allocation of public space, including streets, sidewalks, transit stops and station areas, focused on efficiency and equity of use; and a review of industry-wide workforce trends, including the potential implications of new mobility options on labor needs, career opportunities, recruitment, training, and economic prospects of transportation workers.

To complete these tasks and incorporate the findings into an analysis of how policies, services and/or programs, and investment strategies can be designed to lead to equitable mobility and reduce greenhouse gas emissions, consultants will assist with review of the topic areas listed below. In each area, Metro staff and subject matter experts will provide background information and assess the current state of policies and practice, in terms of how they do or do not advance equity and support Metro's greenhouse gas emissions reduction goals. The consultant team will synthesize and expand on this assessment. They will also bring in research on national or international best practices, emerging trends, and additional data, information, and expertise

needed to provide a holistic and comprehensive assessment of each topic. If Metro staff or other consultant teams have already completed best practices or other analyses on these topic areas, Metro will provide the consultants with those efforts.

The topic areas will likely include:

- **Mobility services**, including assessing Metro’s existing services and investment policies, as well as the status of improvements being implemented to increase accessibility options for people with disabilities, and identifying future opportunities for fixed-route bus, flexible services, innovative mobility, and water taxi services. This will include an assessment of Metro’s current approach to evaluating and choosing the appropriate mix of services, and how Metro designs service to integrate with Link light rail and others.
- **Existing capital facilities and future improvement programs**, including but not limited to developing additional base capacity and implementing the transportation improvements and street improvements needed to improve speed and reliability, expand RapidRide, and generally deliver fixed-route service.
- **Emerging technologies** that support mobility as a service, improve the customer experience, and enhance customer access to mobility services and information.
- **Facilities integration** to support transfers and multimodal integration in region’s fixed-route network and accommodate emerging transportation services and modes.
- **Policies for the allocation of public space**, including streets, sidewalks, transit stops, station areas, curb space, and right-of-way.
- **Land use and zoning patterns** that support transit access and transit-oriented development.
- **Transit accessibility**, including access to transit and fare payment options and enforcement. As Metro is transmitting a plan in September 2019 for implementing an income-based approach to fares in March 2020, the framework will take a high-level look at fares, rather than conducting an in-depth review.
- **Workforce trends**, including industry trends and practices to support and improve equitable and sustainable outcomes within its workforce, to provide new employment opportunities and ensure employees benefit from jobs created from the mobility transformation, and strengthen local partnerships and pipelines to attract the best people.

Metro may change the topic areas and their organization in the final framework. After completing this review, the consultant will support Metro in considering the opportunities identified and consolidating them into a holistic package of recommended changes to improve our ability to advance equity and reduce greenhouse gas emissions. The consultant may help Metro develop guidance and/or criteria to prioritize investments in topic areas in alignment with the guiding principles.

Engagement. Motion 15253 asks for outreach and engagement with regional partners, transit riders, transit’s workforce, labor unions, and local communities, including but not limited to low-income populations, communities of color, immigrants and refugees, and limited English-speaking populations. Metro staff will work with a consultant team—including local,

community-based organizations—to develop a wide-ranging engagement process to ensure that people in communities throughout the county have the opportunity to weigh in on topics with major policy implications and inform the framework development.

Through this engagement process, Metro aims to:

- Define a shared vision for equitable and sustainable mobility in King County.
- Develop guiding principles and recommended actions that align with those principles, including direction for future policy updates.
- Build trust and improve partnerships and relationships.

Metro’s engagement process will include:

- **Equity Cabinet:** Metro will engage priority populations through an Equity Cabinet, comprised of 15-20 community leaders compensated for their time and expertise. The cabinet will develop the final guiding principles and recommended actions for transmittal to the Council with the framework. The equity cabinet will elevate opportunities for community-led decision making and increase representation of priority populations in policy and planning processes.
- **Briefings, workshops, interviews, and discussions with regional partners:** Metro will engage partners through briefings, workshops, interviews, and one-on-one discussions on topics like the guiding principles and potential policy changes. This engagement will start in spring 2019 and continue until the framework is ready for review. We will engage partners through existing venues, potentially including but not limited to: Regional Transit Committee, Sound Cities Association, METRO CONNECTS Technical Advisory Committee, Metro’s Mobility Futures Cabinet, regional Transportation Boards, the King County Transit Advisory Committee, the King County Access Task Force, King County Mobility Boards, Puget Sound Regional Council, Metro employee town halls, and venues for engagement with employees, labor, and transit partners. Metro will also engage the King County Council through a briefing this summer in the middle of the process, as well individual meetings with Council offices as needed.
- **Online workshops, briefings, and other opportunities to engage transit riders:** Metro will engage transit riders by conducting online workshops with the general public and community organizations. We will also brief the King County Transit advisory Commission and advocacy coalitions. This work will build on existing efforts, such as Metro’s rider/non-rider survey and the engagement around income-based fares.

Metro will seek assistance from the consultant team and community-based organizations with:

- **Communications,** including assistance in developing a communications plan and developing materials, including translation and transcreation.
- **Interviews, focus groups, and surveys** to inform the development of the guiding principles and learn more about opportunities for mobility improvements.

- **Coordination with regional leaders and partner jurisdictions** to inform the development of the guiding principles and learn more about opportunities for partnerships and new mobility services.

Document development support. The consultant team will assist with the development of the mobility framework report, including assisting with writing, editing, formatting, tables, charts, graphic design, and document production.

For more information, see Appendix C, “Final Request for Proposals (RFP).”

Equity Impact Review Process

The King County Equity Impact Review tool is a process and a tool to identify, evaluate, and communicate the potential impact of a policy or program on equity, both positive and negative. Metro will use the King County Equity Impact Review process to complete the framework and ensure it prioritizes recommended investment strategies and policy changes that advance equitable and sustainable outcomes.

Stages 1-3 will take place through framework development. Stage 1, “Scope,” includes Metro’s work to develop this scoping document, set up a staffing structure that supports the prioritization of equity and sustainability, and procure a consultant who will prioritize equity through a procurement process that lives up to the contracting commitments in the County’s Strategic Plan for Equity and Social Justice. Filing this scoping document and procuring the consultant team to support this effort are the major milestones in the stage.

Stage 2, “Assess Equity & Community Context,” will include the analysis, research, and community and stakeholder engagement to identify our guiding principles, desired future state, and recommended next steps. In each stage of the process, it will consider distributional equity, process equity and intergenerational equity. It will also include efforts by Metro and the consultant to understand who overtly benefits (and who does not) from Metro’s existing policies, programs and/or services, and investment strategies, as well as whether they do or do not advance equitable outcomes. Finally, Stage 2 covers Metro and the consultant’s work to review best practices for advancing equity through policies, programs and/or services, and investment strategies, and highlight opportunities to better do so at Metro.

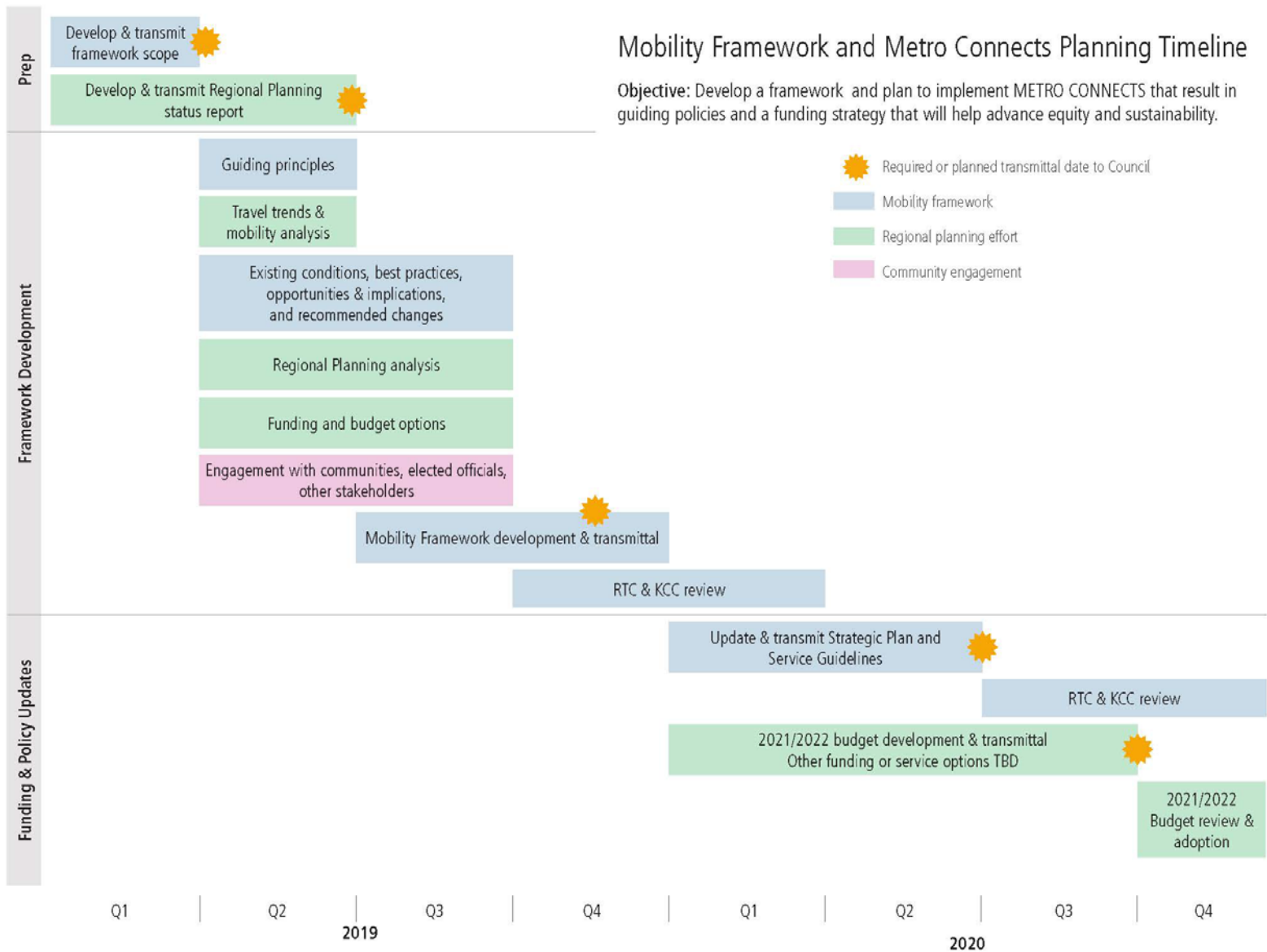
Stage 3, “Analysis and Decision Making,” will include efforts to make recommendations for how to change policies, programs and/or services, and investment strategies to better advance equitable outcomes, based on the analysis done in Stage 3. Producing the final mobility framework by the end of the October will be the main milestone in this stage.

Stage 4, “Implement,” will occur when Metro develops and implements updated policies and a budget that reflect the guiding principles and recommendations identified in the mobility framework. Major milestones will include the transmittal and adoption of the updated policy documents and budget, and the first implementation of new services and projects under the governance of these policies. Finally, Stage 5, “Ongoing Learning,” will occur as Metro learns and reviews impacts of changes beyond 2021-22.

Timeline

As mentioned, Metro is procuring a consultant team to support the development of this framework and the response to Motion 15252. Metro and the Executive aim to transmit the completed framework to the Council by October 31, 2019. Metro will update the Strategic Plan for Public Transportation and Service Guidelines in 2020, in accordance with the framework, and aims to transmit updated documents to the Council by June 30, 2020. Metro will develop an aligned 2021-2022 budget proposal, for transmittal with the Executive's budget in September of 2020. Figure 1, "Mobility Framework and METRO CONNECTS Planning Timeline," illustrates the major milestones and work tasks associated with the framework and regional planning effort.

Figure 1, Mobility Framework and METRO CONNECTS Planning Timeline



Budget

The work needed to prepare the framework for the equitable and sustainable implementation of mobility will be accomplished by Metro staff with the assistance of a consultant team. It will be guided by a community engagement effort that puts the voices of historically disadvantaged populations at our decision making table, while seeking input from a wide variety of stakeholders. Metro has developed a scope for consultant services and is engaged in the procurement process.

Last fall, when the Council passed Motion 15253, the County's Budget Director alerted Councilmembers that undertaking this effort would require significant financial resources. Metro and the Executive prepared a supplemental budget request to ensure we have adequate resources directed to the consultant and staff teams that will lead the work, to the engagement process, and to the development of materials that will be used to solicit feedback and communicate our recommendations. A supplemental appropriation in the amount of approximately \$1 million to fund the costs associated with responding to Motion 15252 and 15253 will be transmitted under a separate cover letter.

Appendix A: Metro's Strategy for Delivering More and Better Mobility Solutions

METRO'S STRATEGY FOR Delivering More and Better Mobility Solutions


Demand for transit is rising throughout King County, driven both by job and population growth and by the increasing number of people living in poverty or near-poverty who rely on public transportation.

To help meet the demand, Metro needs to make the most of our funding, operational know-how, and new technology and business models to provide more and better transit options in a cost-effective and equitable way.

This four-part strategy will guide us. As we move toward becoming a King County department, we will organize our internal structure and the work we do around this strategy.

The targets will help us by defining the achievements we should aim for. The targets are bold and will not be realized quickly. We will continually strive to reach them over the years ahead.


Metro's 4-part strategy and targets (near term by close of 2019; five years by close of 2022)

 **1 MAKE TRANSIT EASY TO USE, AVAILABLE TO ALL**

Provide integrated, equitable and accessible mobility service

WHAT WE'LL DO:

- ▶ Provide faster and more frequent and reliable fixed-route service to more places
- ▶ Find creative ways to serve less-dense areas, using new technology and business models and partnerships
- ▶ Integrate our services with Sound Transit and other transit agencies to give our customers seamless travel

 **TARGETS:**

- ▶ Near term: 135 million Metro rides
- ▶ Five years: 235 million rides in King County across all Metro-operated or partnered services

 **2 GET THINGS BUILT**

Accelerate the development of transit infrastructure that is critical to service growth

WHAT WE'LL DO:

- ▶ Develop the needed infrastructure (bus base, layover, corridor improvements, etc.)
- ▶ Streamline our organization and processes to get things done quickly and efficiently

 **TARGETS:**

- ▶ Near term: Cut in half the capital planning and delivery process; deliver projects at twice the rate we do today
- ▶ Five years: Eighth base built

 **3 PARTNER WITH OTHERS**

Amplify the capacity of our system through partnerships

WHAT WE'LL DO:

- ▶ Collaborate with others to deliver service growth, build infrastructure, offer innovative mobility services
- ▶ Strengthen our reputation for being out-front, being easy to work with, and moving quickly

 **TARGETS:**

- ▶ Establish a clear definition of "partnership" and a template for use throughout Metro, and launch five private/public mobility partnerships
- ▶ Five years: Using METRO CONNECTS Development Program, deliver 20 transit corridors—RapidRide, express and frequent

 **4 ENABLE EMPLOYEES TO DO TOP QUALITY WORK**


Deliver by building a highly motivated and high-performing workforce.

WHAT WE'LL DO:

- ▶ Hire skilled, motivated employees
- ▶ Offer training and development opportunities
- ▶ Promote health and well-being
- ▶ Reward high performance
- ▶ Work proactively

 **TARGETS:**

- ▶ Near term: Increase employee well-being and performance by starting one wellness center in 2019; have wellness centers in all bases in five years
- ▶ Five years: Partner with local colleges and training centers to develop five internship programs

 **CUSTOMER FACING TECHNOLOGY TARGET:**

- ▶ Near term: A unified mobile tool that enables customers to plan, track in real-time, and pay for mobility services

Appendix B: Becoming a Mobility Agency



By becoming a mobility agency that both provides public transportation and integrates new travel options, Metro can lead the way in reducing congestion and improving people’s ability to get to work, school, services and more.

With rapid population and job growth, King County has an urgent need to lower congestion and improve regional mobility.

Meanwhile, the transportation landscape itself is undergoing a transformation. Technological advances such as connected and autonomous vehicles, and new mobility models like e-hailing, ridesharing and microtransit, are beginning to offer new, convenient, and flexible ways to get around.

Despite all the change underway, transit will continue to be the most effective way to move the most people in dense urban environments. High-capacity fixed-route bus and light rail service therefore must remain the backbone of regional mobility. New and innovative mobility services will complement transit by offering riders first- and last-mile connections to and from transit and by creating cost-effective ways to serve low-density areas. The integration of these emerging services with transit will transform regional mobility.

Metro is the region’s largest public transportation provider, with expertise in service planning, operations, capital delivery, regional partnerships, and meeting our diverse customers’ needs. We are uniquely positioned to lead our region’s mobility transformation in a way that advances social equity and opportunity, ensures universal accessibility, and enables people to travel farther, faster, and more easily throughout King County.

Becoming a mobility agency will position Metro to fulfill our mission: Provide the best possible public transportation services and improve regional mobility and quality of life in King County.

Our strategy for transforming mobility



Continually evaluate and adjust Metro’s mix of services to maintain our focus on the services we deliver best while partnering with others to deliver complementary mobility options.



Work with regional partners to improve and expand the high-capacity fixed-route bus and rail network, strengthening the role of public transit as the backbone of regional mobility.



Improve the quality and cost-effectiveness of flexible route and demand response services by adopting new approaches and by collaborating with private mobility providers.



Adopt open and interoperable systems to enable customers to seamlessly plan, pay for, and transfer along their multimodal journeys.



Help develop regulations, incentives and subsidies to ensure that both public and private mobility services are safe and provide equitable access for disadvantaged populations.



Proactively transform our workforce through development and training programs so that employees benefit from the higher-skill and higher-wage opportunities created by the mobility transformation.

Appendix C: Final Requests for Proposals (RFP)

Request for Proposals (RFP)



Department of Executive Services
 Finance and Business Operations Division
Procurement and Payables Section
 206-263-9400 TTY Relay: 711

ADVERTISED DATE: FEBRUARY 28, 2019

RFP Title: King County Metro Transit Mobility Framework and Regional Planning Consultant

RFP Number: 1038-19-VLN

Due Date: March 21, 2019 - 2:00 p.m. PT

Buyer: Victoria Nakamichi vicki.nakamichi@kingcounty.gov 206- 263-9299

Alternate Buyer: Lonnie Platt, lonnie.platt@kingcounty.gov, 206-263-1287

PRE-PROPOSAL CONFERENCE

Date: March 11, 2019
 Time: 2:00 p.m.
 Location:
 Chinook Building
 401 5th Avenue
 Seattle, WA 98104
 3rd Floor, Room 310
 Conference Call: 206-263-8114
 Conference ID: 83816

Sealed Proposals are hereby solicited and will only be received by:
 King County Procurement & Payables Section
 Chinook Building, 3rd Floor
 401 Fifth Avenue
 Seattle, WA 98104
 Office Hours: 8:00 a.m. – 5:00 p.m. PT
 Monday - Friday

We acknowledge that all Addenda issued for this RFP have been examined as part of the proposal documents.

Company Name

Address

City/State /Postal Code

Signature

Authorized Representative / Title

Contact Name:

Phone:

Email

Company Headquarters Located in State/Province of

SCS Certification number (if applicable)

This Request for Proposal will be provided in alternative formats such as Braille, large print, audiocassette or computer disk for individuals with disabilities upon request.

**DEFINITION OF WORDS AND TERMS APPLICABLE ONLY
TO INSTRUCTION OF THE RFP**

Words and terms shall be given their ordinary and usual meanings. Where used in the Contract documents, the following words and terms shall have the meanings indicated. The meanings shall be applicable to the singular, plural, masculine, feminine and neuter of the words and terms.

Addendum/Addenda: Written additions, deletions, clarification, interpretations, modifications or corrections to the solicitation documents issued by the County during the Proposal period and prior to contract award.

Best and Final Offer: Best and Final Offer shall consist of the Proposer's revised proposal and any supplemental information requested during the evaluation of Proposals. In the event of any conflict or inconsistency in the items submitted by the Proposer, the items submitted last govern.

Competitive Range: The Competitive Range consists of the Proposers that have a reasonable chance of selection for contract award. The Proposal Evaluators (PE) shall conduct the initial evaluation of the proposals considering price and Evaluation Factors established in the RFP. The Buyer and Project Manager/PE together shall compare the evaluations and determine the Competitive Range. The Competitive Range may be reduced after the evaluation of additional information, Best and Final Offers and negotiations.

Criteria, Evaluation Criteria or Evaluation Factors: The elements cited in the RFP that the County shall examine to determine the Proposers understanding of the requirements; technical, business and management approach; key personnel; qualification and experience of the Proposer; potential for successfully accomplishing the Contract; risk allocation and the probable cost to the County.

Days: Calendar days.

Measurable Amount of Work: For purposes of payment of a living wage, Measurable Amount of Work means a definitive allocation of an employee's time that can be attributed to work performed on a specific matter, but that is not less than a total of one hour in any one week period.

Proposal Evaluators (PE): Team of people appointed by the County to evaluate the proposals, conduct discussions, call for Best and Final Offers, score the proposals and make recommendations.

Proposer: Individual, association, partnership, firm, company, corporation or a combination thereof, including joint ventures, submitting a proposal to perform the Work.

RFP: Request for Proposals, also known as the solicitation document.

Reference Documents: Reports, Specifications, and drawings which are available to Proposers for information and reference in preparing proposals but not as part of this Contract.

SECTION 1 Instruction to Bidders

1.1 Proposal Submission

Proposers are encouraged to use recycled paper in the preparation of additional documents submitted with this solicitation, and shall use both sides of paper sheets where practicable.

Sealed proposals shall contain all required attachments and information and be submitted to King County (hereinafter "County") no later than the date, time and place stated on the front of this RFP or as amended. The proposals shall show the title and number, the due date specified, and the name and address of the Proposer on the face of the envelope. Proposers are cautioned that failure to comply may result in non-acceptance of the proposal. The Proposer accepts all risks of late delivery of mailed proposals or of misdelivery regardless of fault. Proposals properly and timely submitted will be publicly opened.

Proposals will only be accepted from Contractors able to complete the delivery of goods or services described in the specifications. Joint ventures shall submit one proposal for the team, with accompanying proof of the joint venture agreement.

If a company chooses not to submit a proposal, the County requests the company advise the Buyer by email if they desire to remain listed for the subject of this RFP and state the reason they did not submit a proposal.

1.2 Electronic Commerce and Correspondence

King County is committed to reducing costs and facilitating quicker communication to the community by using electronic means to convey information. As such, most Invitations to Bid, Requests for Proposal, and Requests for Qualifications as well as related exhibits, appendices, and issued addenda can be found on the King County Internet Web Site, located at www.kingcounty.gov/procurement. Current bidding opportunities and information are available by accessing the "Solicitations" tab in the left hand column.

King County Procurement Services features an **Online Vendor Registration (OVR)** program that permits vendors, consultants and contractors to register their business with the County. This OVR system allows interested parties to either directly register their firm by creating a unique User ID, or to visit the website as a guest. Information regarding bid documents will be available to all users; however, site visitors accessing the site as a guest will not be able to document their interest in a project or add their name to the document holder's list. They will receive no automatic notification of issued addenda. As such, the County encourages full registration in order to directly communicate with document holders regarding any issued addenda or other important information concerning the solicitation.

After submittals have been opened in public, the County will post a listing of the businesses submitting proposals, and later, any final award determination.

Full information on vendor registration is available at the website.

1.3 Late Proposals

Proposals, modifications of proposals, received at the office designated in the solicitation after the exact hour and date specified for receipt will not be considered.

1.4 Cancellation of RFP or Postponement of Proposal Opening

The County reserves the right to cancel this RFP at any time. The County may change the date and time for submitting proposals prior to the date and time established for submittal.

1.5 Proposal Signature

Each proposal shall include a completed Proposal response form, the first page of this document, signed by an authorized representative of the Proposer.

1.6 Addenda

If at any time, the County changes, revises, deletes, clarifies, increases, or otherwise modifies the RFP, the County will issue a written Addendum to the RFP.

1.7 Questions and Interpretation of the RFP

No oral interpretations of the RFP will be made to any Proposer. All questions and any explanations must be requested in writing and directed to the Buyer and Alternate Buyer no later than **five (5) Days** prior to the due date specified in the solicitation. Oral explanations or instructions are not binding. Any information modifying a solicitation will be furnished to all Proposers by addendum. **Communications concerning this proposal, with other than the listed Buyer may cause the Proposer to be disqualified.**

1.8 Schedule

Day/Month/Year	Event
<u>2/28/19</u>	Public announcement of Request for Proposals
<u>3/11/19</u>	Preproposal conference
<u>3/15/19</u>	Last day for questions
<u>3/21/19</u>	Proposals due
<u>3/22/19</u>	*Begin Evaluation of Proposals
<u>3/26/19</u>	*Begin Interviews/Demonstrations/conduct Site Visits, if applicable
<u>4/03/19</u>	*Begin Negotiations
<u>4/15/19</u>	*Execute Contract

***NOTE:** Dates preceded by an asterisk are estimated dates. Estimated dates are for information only.

1.9 Pre-Proposal Conference

A pre-proposal conference will be held at the time, date and location indicated on the cover page of the RFP. All prospective Proposers are strongly encouraged to attend. The intent of the pre-proposal conference is to assist the Proposers to more fully understand the requirements of this RFP. Proposers are encouraged to submit questions in advance to enable the County to prepare responses; these questions should be E-mailed to the Buyer. Questions will be encouraged during the pre-proposal conference also.

1.10 Examination of Proposal and Contract Documents

The submission of a proposal shall constitute an acknowledgement upon which the County may rely that the Proposer has thoroughly examined and is familiar with all requirements and documents pursuant with the RFP, including any addenda and has reviewed and inspected all applicable statutes, regulations, ordinances and resolutions addressing or relating to the goods or services to be provided hereunder.

The failure of a Proposer to comply with the above requirement shall in no way relieve the Proposer from any obligations with respect to its proposal or to any Contract awarded pursuant to this RFP. No claim for additional compensation shall be allowed which is based upon a lack of knowledge or misunderstanding of this RFP.

1.11 Cost of Proposals and Samples

The County is not liable for any costs incurred by Proposer in the preparation and evaluation of proposals submitted. Samples of items required must be submitted to location and at time specified. Unless otherwise specified, samples shall be submitted with no expense to the County. If not destroyed by testing, samples may be returned at the Proposer's request and expense unless otherwise specified.

1.12 Modifications of Proposal or Withdrawal of Proposal Prior to Proposal Due Date

At any time before the time and date set for submittal of proposals, a Proposer may submit a modification of a proposal previously submitted to the County. All proposal modifications shall be made in writing, executed and submitted in the same form and manner as the original proposal.

Proposals may be withdrawn by written notice received prior to the exact hour and date specified for receipt of proposals. A proposal also may be withdrawn in person by a Proposer or authorized representative provided their identity is made known and they sign a receipt for the proposal, but only if the withdrawal is made prior to the exact hour and date set for receipt of proposals. All requests for modification or withdrawal of proposals, whether in person or written, shall not reveal the amount of the original proposal.

1.13 Proposal Withdrawal After Public Opening

Except for claims of error granted by the County, no Proposer may withdraw a proposal after the date and time established for submitting proposals, or before the award and execution of a Contract pursuant to this RFP, unless the award is delayed for a period exceeding the period for proposal effectiveness.

Requests to withdraw a proposal due to error must be submitted in writing along with supporting evidence for such claim for review by the County. Evidence must be delivered to the County within two (2) Days after request to withdraw. The County reserves the right to require additional records or information to evaluate the request. Any review by the County of a proposal and/or any review of such a claim of error, including supporting evidence, creates no duty or liability on the County to discover any other proposal error or mistake, and the sole liability for any proposal error or mistake rests with the Proposer.

1.14 Error and Administrative Corrections

The County shall not be responsible for any errors in proposals. Proposers shall only be allowed to alter proposals after the submittal deadline in response to requests for clarifications or Best and Final Offers by the County.

The County reserves the rights to allow corrections or amendments to be made that are due to minor administrative errors or irregularities, such as errors in typing, transposition or similar administrative errors.

1.15 Proposal Content Requirements

- A. The proposal shall contain the following items and follow the sequence outlined below:

Sec. 1 & 2 Instructions and Information about the RFP Process

Cover sheet with Proposer's Signature

Compliance Forms:

- [Equal Benefit Declaration](#), if applicable
- [Internal Revenue Service Form KC W-9*](#)

*If not on file with the County within the past two years.

Compliance forms are available for download at www.kingcounty.gov/procurement/forms.

Sec 3 - Scope of Work and Proposal Requirements

Contract: Identify any exceptions to terms and conditions and attachments with a signed letter from an attorney or authorized representative

- B. Submit **four (4)** copies of the proposal and attachments. One original [marked ORIGINAL] shall be unbound.
1. Proposers shall submit with their proposal an exact duplicate of the original proposal, excluding the pricing information, on **four (4)** flashdrives or compact disks. Two (2) in Adobe Acrobat™ format, and two (2) in native format. Proposers shall label the format on each flashdrive/disk.

1.16 Compliance with RFP Terms, Attachments and Addenda

- A. The County intends to award a Contract based on the terms, conditions, attachments and addenda contained in this RFP. Proposers shall submit proposals, which respond to the requirements of the RFP.
- B. Proposers are strongly advised to not take exceptions to the terms, conditions, attachments and addenda; exceptions may result in rejection of the proposal. An exception is not a response to a proposal requirement. If an exception is taken, a 'Notice of Exception' must be submitted with the proposal. The 'Notice of Exception' must identify the specific point or points of exception and provide an alternative.
- C. The County reserves the right to reject any proposal for any reason including, but not limited to, the following –

- Any proposal, which is incomplete, obscure, irregular or lacking necessary detail and specificity;
 - Any proposal that has any qualification, limitation, exception or provision attached to the proposal;
 - Any proposal from Proposers who (in the sole judgment of the County) lack the qualifications or responsibility necessary to perform the Work;
 - Any proposal submitted by a Proposer which is not registered or licensed as may be required by the laws of the state of Washington or local government agencies;
 - Any proposal, from Proposers who are not approved as being compliant with the requirements for equal employment opportunity; and
 - Any proposal for which a Proposer fails or neglects to complete and submit any qualifications information within the time specified by the County.
- D. The County may, at its sole discretion, determine that a proposal with a 'Notice of Exception' merits evaluation. A proposal with a 'Notice of Exception' not immediately rejected may be evaluated, but its competitive scoring shall be reduced to reflect the importance of the exception. Evaluation and negotiation shall only continue with the Proposer if the County determines that the proposal continues to be advantageous to the County.
- E. In consideration for the County's review and evaluation of its proposal, the Proposer waives and releases any claims against the County arising from any rejection of any or all proposals, including any claim for costs incurred by Proposers in the preparation and presentation of proposals submitted in response to this RFP.
- F. Proposals shall address all requirements identified in this RFP. In addition, the County may consider proposal alternatives submitted by Proposers that provide cost savings or enhancements beyond the RFP requirements. Proposal alternatives may be considered if deemed to be in the County's best interests. Proposal alternatives shall be clearly identified.

1.17 Acceptance of Contract, Attachments and Addenda

Proposer(s) shall review the Contract, and all its attachments, and submit a signed letter by their attorney or authorized legal representative stating they intend to comply with all the terms and conditions. The signed letter shall be submitted with the proposal.

If there are exceptions taken to the terms and conditions in **Exhibit 1 - Contract** and any of its attachments, the Proposer's attorney or authorized legal representative shall sign an exception letter describing reasoning for the exceptions and include the exception letter and **Exhibit 1 - Contract** as an attachment to the proposal, identifying the exceptions and proposed changes. All proposed changes shall be tracked the Contract using the tracking changes feature in Microsoft Word®.

The project schedule is such that it requires a very efficient proposal review and negotiation period. It is very important that any possible roadblocks or issues the

Proposer may have with the terms and conditions are identified during the proposal process and resolved prior to proceeding with the Contract negotiations.

1.18 Forms Required before Contract Signing

The Proposer shall submit within five (5) Days of notification from the County the insurance certificate and endorsement meeting the levels of coverage set forth in **Exhibit 1 – Contract**.

1.19 Collusion

If the County determines that collusion has occurred among Proposers, none of the proposals from the participants in such collusion shall be considered. The County's determination shall be final.

1.20 Proposal Price and Effective Date

- A. The proposal price shall include everything necessary for the prosecution and completion of Work under the Contract including but not limited to furnishing all materials, equipment, supplies, tools, plant and other facilities and all management, supervision, labor and service, except as may be provided otherwise in this RFP. Proposed Prices shall include all freight charges, FOB to the designated delivery point. Washington State sales/use taxes and Federal excise taxes shall not be included in the proposal price. The County shall pay any Washington State sales/use taxes applicable to the Contract price or tender an appropriate amount to the Contractor for payment to Washington State. The County is exempt from Federal excise taxes. All other government taxes, duties, fees, royalties, assessments and charges shall be included in the Proposal price.
- B. In the event of a discrepancy between the unit price and the extended amount for a proposal item, the County reserves the right to clarify the Proposal.
- C. The proposal shall remain in effect for One Hundred and Twenty (120) Days after the proposal due date, unless extended by agreement.

1.21 Procedure When Only One Proposal Is Received

If the County receives a single responsive, responsible proposal, the County may request an extension of the proposal acceptance period and/or conduct a price or cost analysis on such proposal. The Proposer shall promptly provide all cost or pricing data, documentation and explanation requested by the County to assist in such analysis. By conducting such analysis, the County shall not be obligated to accept the single proposal; the County reserves the right to reject such proposal or any portion thereof.

1.22 Protest Procedures

King County has a process in place for receiving protests based upon the RFP or contract awards. The protest procedures are available at <http://www.kingcounty.gov/depts/finance-business-operations/procurement/for-business/do-business/protest.aspx>

SECTION 2 PROPOSAL EVALUATION AND CONTRACT AWARD

2.1 Proposal Evaluation

- A. The County will evaluate proposals using the criteria set forth in this RFP. If deemed necessary, written and/or oral discussions, site visits or any other type of clarification of proposal information may be conducted with those Proposers whose proposals are found to be potentially acceptable. Identified deficiencies, technical requirements, terms and conditions of the RFP, costs or prices, and clarifications may be included among the items for discussion. The discussions are intended to give Proposers a reasonable opportunity to resolve deficiencies, uncertainties and clarifications as requested by the County and to make the cost, pricing or technical revisions required by the resulting changes. In addition, the County may request additional business and administrative information.
- B. The County may find that a Proposer appears fully qualified to perform the Contract or it may require additional information or actions from a Proposer. In the event the County determines that the proposal is not within the Competitive Range the County shall eliminate the proposal from further consideration.
- C. The evaluation of Proposers' proposals and additional information may result in successive reductions of the number of proposals that remain in the Competitive Range. If applicable to the procurement, the firms remaining in the Competitive Range may be invited to continue in the proposal evaluation process, and negotiations.
- D. Upon completion of discussions, the County may issue to all remaining potentially acceptable Proposers within the competitive range a request for Best and Final Offers. The request shall include notice that discussions are concluded, an invitation to submit a revised proposal with a Best and Final Offer, and a new submittal date and time.
- E. The County may enter negotiations with one or more Proposers to finalize Contract terms and conditions. Negotiation of a Contract shall be in conformance with applicable federal, state and local laws, regulations and procedures. The objective of the negotiations shall be to reach agreement on all provisions of the proposed Contract. In the event negotiations are not successful, the County may reject proposals.
- F. The County reserves the right to make a Contract award without written and/or oral discussions with the Proposers and without an opportunity to submit Best and Final Offers when deemed to be in the County's best interests. Contract award, if any, shall be made by the County to the responsible Proposer whose proposal best meets the requirements of the RFP, and is most advantageous to the County, taking into consideration price and the other established evaluation factors. The County is not required to award a Contract to the Proposer offering the lowest price. The County shall have no obligations until a Contract is signed between the Proposer and the County. The County reserves the right to award one or more contracts as it determines to be in its best interest.

2.2 Evaluation Criteria

This section describes mandatory descriptions and submittals that shall be addressed in or included with each proposal. Failure to address or include all of the items discussed in this section may subject the proposal to immediate rejection. Metro will be the final authority in determining the responsiveness of a proposal. All materials submitted become the property of Metro. Proposers shall provide technical documents demonstrating an understanding of the project requirements and scope of work as stated throughout this RFP, including project task descriptions, and a list of work tasks and related timelines to produce expected results.

1. Qualifications and Experience – 40 points

A. Prime Consultant Qualifications and Experience – 10 points

The County will evaluate the Prime Consultant (Prime) with regard to the firm's demonstrated experience managing and performing projects similar to those activities identified within the Scope of Work to the RFP. No preference will be given for previous King County projects. The County will evaluate experience of the Prime in the following areas:

1) Equity & Social Justice and Impact Review

Competence and experience in the field of equity and social justice (ESJ), including conducting meaningful equity impact analysis of existing and future services, programs, and investments that supports development of strategies or changes to policy; ESJ public and community engagement and inclusive outreach/public participation; using this competence to facilitate conversations, build sustainable relationships and deliver information and presentations with/to a variety of community, employee, and government stakeholders

2) Capability of Firm

Capabilities of the Proposer's Firm related to the activities identified within the Scope of Work for this contract, including firm's size, financial status, personnel, special expertise, general credits, and professional licenses, and capacity to provide services in a timely manner.

Proposal Submittal Requirements

1. Provide a concise narrative of your firm's history and capabilities with projects of this nature and size, **maximum one (1) page**.
2. Provide firm's financial statement for the past three years. Provide a banking reference, include the contact person and title, address, and current phone number. NOTE: If a Proposer deems such information to be confidential or proprietary in nature, the Proposer shall place this portion of its proposal in a separate envelope, clearly and prominently marked, "PROPRIETARY INFORMATION." Metro will not disclose or reveal the contents of such separately designated proprietary information unless required to do so by law.

3. Submit at least two (2) project examples successfully completed by the Prime that demonstrate experience with the elements above, maximum two (2) pages. Provide project examples that are most relevant to the Scope of Work and similar in size and scope to this project. More recent projects are preferred. Project information shall include:

- Description of the work the firm is responsible for on the project;
- Firm staff who worked on the project;
- Start and end date of work performed by firm;
- Sample materials, graphics, or content developed for the project;
- Samples should be brief highlights; links may be provided to original source materials
- Project references: names, positions, and contact information of clients;
- Total price of work performed by firm;
- Reasoning for why the project examples are relevant to the Scope of Work and technical challenges encountered, if any, on the project.

B. Sub-consultant or Prime Qualifications and Experience – 15 points

The County will evaluate the demonstrated experience with activities similar to those to be performed on this Contract, including the Prime if the Prime will be performing those activities. No preference will be given for previous King County projects. The County will evaluate experience in the following areas:

1) **Management & Coordination**

Successful management and coordination of a multidisciplinary team for large planning and policy work of similar size and scale to this project, involving multiple projects and work orders concurrently. Project Management includes managing and maintaining overall task and sub-consultant budgets; reporting on budget and schedule; ensuring timely and accurate invoicing; ensuring high-quality timely work products; providing timely notice and documentation of changes; managing and coordinating numerous sub-consultants; communicating and coordinating project activities, roles and responsibilities; and being the primary point of contact and communication.

Note - if a sub-consultant is proposed to provide the primary management and coordination of work under this Contract, the Proposer must clearly explain how project control and management will occur in the Project Understanding and Approach submittal.

2) **Transportation & Population Trends Assessment**

Assessment of travel and population existing conditions and future trends. Includes assessment of equity needs and impacts; of regional GHG emissions; land use zoning patterns and development; and clear, concise communication of findings and implications for policies, programs, services

and future transportation investment. Experience assessing a variety of travel modes, including both traditional and new technology enabled services. Experience with local travel demand models, including Puget Sound Regional Council's model.

3) Performance Measurement

Performance measurement and analysis of transit or transportation investments; including mobility, equity and sustainability/greenhouse gas emissions outcomes.

4) Transit Policy & Planning

Analysis and identification of opportunities for policies, programs, services and investment strategy for transit services. Experience with transportation and transit planning tools and geographic analysis down to stop level data, such as REMIX, or similar. Experience planning for integration of innovative mobility services with fixed route transit, including use of a variety of data sources to evaluate customer travel demand.

5) Economic and Financial Analysis & Cost Assessment

Financial analysis, cost modeling and assessment; includes development and refinement of cost estimates; assessment of revenue and financing options and forecasts; and development of investment scenarios and screening criteria.

6) Greenhouse Gas Analysis & Climate Policy Assessment

GHG quantification and VMT reduction analysis, modeling and assessment; includes evaluation of climate policies and options; development of emission reduction scenarios and recommendations for policies and implementation approaches.

7) Public and Community Engagement

Engagement and facilitation with diverse stakeholders; including meaningful engagement and feedback from a diversity of perspectives; identification of equity needs and impacts; and summaries and synthesis that provide clear and relevant feedback and insight for decision making.

8) Equity & Social Justice and Impact Review

Any additional competence and experience in the field of equity and social justice (ESJ) not covered by Prime qualifications and experience above. Including conducting meaningful equity impact analysis of existing and future services, programs, and investments that supports development of strategies or changes to policy; ESJ public and community engagement and inclusive outreach/public participation; using this competence to facilitate conversations, build sustainable relationships and deliver information and presentations with/to a variety of community, employee, and government stakeholders

Proposal Submittal Requirements

1. Provide a narrative, **maximum two (2) pages**, that provides the following for each discipline of work listed above:
 - a. The firm(s) performing the work.
 - b. A concise narrative of the experience in that work discipline.
 - c. Project examples performed by the identified firm or their staff proposed for the work. Project information shall include:
 - Description of the work the firm or proposed;
 - Staff who worked on the project;
 - Start and end date of work performed by firm(s);
 - Total price of work performed by firm(s);
 - Reasoning for why the project examples are relevant to the Scope of Work and technical challenges encountered, if any, on the project.
- C. Team Organizational Structure – 10 points
The County will evaluate the structure of the team for its effectiveness in implementing the Scope of Work.

Proposal Submittal Requirements

1. Provide a project organization chart, **maximum one (1) page**, including but not limited to Prime Consultant, all Key Personnel, and Sub-consultants, showing the organizational structure of the project team and identifying each team member by name, firm, and project role and responsibility.
2. Provide a narrative explaining why your team is organized as proposed and why the structure benefits the project, maximum one (1) page.
 - Describe how the proposed team worked together on past and/or current projects and how the proposed Project Team will work together on this contract;
 - Identify in-house resources which will be providing support to this contract; and
 - Identify key personnel responsible for overseeing these resources' performance.
- D. Communication – 5 points
The County will evaluate the team's demonstrated ability to communicate effectively in a variety of settings: in presentations to a variety of audiences, in the preparation of technical analyses and documentation, including the quality of this Proposal.

Proposal Submittal Requirements

1. All elements of the Consultant's proposal will be evaluated, in addition to the specific samples noted below.
2. Sample Documents. Provide **two (2) sample** documents as described below, which together should not exceed a **maximum of six (6) pages**. It is strongly preferred that samples relate to projects that are similar to this scope of work.
 - a. One sample of a presentation conveying technical information to a non-technical audience using PowerPoint slides, infographic, one page pamphlet, or comparable method. This sample may have multiple thumbnail or reduced images on each page.
 - b. One sample of an excerpt from a technical memorandum or report, including text with table and/or figure illustrating a technical issue. This sample must be full, actual size, not using reduced images.
 - c. Sample Document Format Parameters:
 - One page is defined as "8 1/2"x11". An 11"x17" sheet is counted as two pages.
 - Sample documents shall be actual examples of past work products produced by the Proposer's team.
 - Proposer may add titles, labels, author, etc. to provide context to sample documents.
 - Client and/or Owner identity may be redacted at the Proposer's discretion.

The County will remove any pages that exceed the limit.

2. Project Approach – 35 points

The County will evaluate the proposed approach to performing tasks identified in the Scope of Work as follows:

A. Project Understanding and Approach to Work – 20 points

The County will evaluate the Proposer's understanding and approach to completing anticipated work as identified in the Scope.

Proposal Submittal Requirements

1. Provide a detailed narrative, **maximum four (4) pages** that identifies the Proposer's understanding under approach to completing anticipated work as identified in the Scope, addressing the following elements:
 - Understanding of Metro's needs;
 - Identification and understanding of key issues, challenges and/or potential risks and constraints you foresee, and proposed process to resolve these challenges and maintain progress of the work;

- Organization of the work;
- Draft high-level task breakdown and schedule
- Management of tasks and work orders to complete the example work in the scope of work, including any sub-consultants;
- Management of costs, schedule, and work quality;
- Approach and process to establish/maintain good relations and foster open and productive communications with Metro and subcontractors;
- Project Team's expectations of Metro;
- Methodologies and procedures to be followed in performing the contract, with specific emphasis upon the following:
 - i. Management plan;
 - ii. Coordination between elements and aspects of the work;
 - iii. Approach and methods for facilitating public and community engagement;
 - iv. Achieving clarity and ensuring deliverables support Metro's needs;
 - v. Schedule and budget control;

B. Equity & Social Justice Innovation Plan – 15 points

Proposers are required to submit an Equity and Social Justice Innovation Plan ("Plan"). The Selected Proposer shall be contractually bound by the Plan submitted as mutually agreed upon between the County and the Proposer. The County is seeking a plan that will advance equity and social justice through the implementation of the work under this contract, and afford sub consultant opportunities to State certified Minority and/or Women Business Enterprises (MWBE) that builds upon the County's ESJ Strategic Plan. Proposers may verify if a firm is Washington State certified at this link: <https://omwbe.wa.gov/directory-certified-firms>.

1) Proposer's Approach to Advancing Equity and Social Justice

The County will evaluate the Proposer's approach to advancing equity and social justice within the County and beyond. The approach could include any one of the following, as it relates to this project as applicable: 1) Cultural competency training among Proposer's staff (e.g., internships or job shadows; 2) Ability to obtain input from culturally diverse populations; 3) integrating the needs of historically disadvantaged and low-income populations into tasks and deliverables 4); the use of social equity innovations beyond industry best practices to promote racial equity during implementation of the Scope of Work; and 5) any other ESJ initiatives that will achieve outcomes applicable to the County's ESJ goals.

Proposal Submittal Requirements

1. Provide a plan and narrative, **maximum four (4) pages**, describing your firm's approach to delivering social equity justice innovation to the communities you serve as outlined above, including:
 - How you would conduct community outreach that considers the needs of non-English speaking populations
 - How you would integrate the needs of historically disadvantaged and low-income populations into potential tasks and deliverables identified in the Scope of Work
 - Use of social equity innovations beyond industry best practices during the implementation of the Scope of Work
 - How your firm notifies sub-consultants and employees of work opportunities that include a network of diverse and community-based partner organizations.
 - How your firm will ensure cultural competency amongst your staff during implementation of the Scope of Work
 - Any other ESJ initiatives, strategies, or experience that will help achieve outcomes applicable to the County's ESJ goals
2. Provide a narrative outlining specific actions your firm will commit to and your expected outcomes during implementation of the Scope of Work that will align with the County ESJ Plan, **maximum two (2) pages**.

Actions for MWBE Participation

The County will evaluate the Proposer's approach and specific actions to be taken to maximize MWBE participation. Provide

Proposal Submittal Requirements

1. Provide a narrative, **maximum one (1) page**, describing how your Plan will address the following:
 - a. What opportunities your firm identified as available for sub-consulting during the performance of this contract related to the Scope of Work;
 - b. Explain how sub-consulting opportunities were identified and what efforts were taken to conduct outreach and partner with MWBE firms;
 - c. Describe specific actions your firm has taken prior to and during the solicitation period to build your team and maximize the participation of MWBE's; and
 - d. How your firm will ensure the implementation of the opportunities you identify in your Plan.

3. Cost – 25 points

The County will evaluate the proposers estimated costs for major anticipated tasks for this project, as well as Key Personnel's direct labor rates, overhead rates, and profit percentages submitted. The submitted financial information will be used as a basis of negotiations.

If a firm does not have an accounting system in place that identifies direct and indirect costs separately, the County will evaluate proposed billing rates. Billing rates are inclusive of direct labor, overhead, and profit.

Proposal Submittal Requirements

1. Provide a narrative and description, **maximum two (2) pages** identifying the 5 to 10 major tasks anticipated for this project, and for each task include a brief description of the task, key staff, billing rate, number of hours, and estimated cost
2. The proposer shall submit the following additional financial information for evaluation:
 - a. For overhead rate firms:
 - i. Current direct labor rates for all proposed Key Personnel.
 - ii. Current financial year overhead rate.
 - iii. Proposed profit stated as a percentage of direct labor only.
 - b. For billing rate firms:
 - i. Current billing rates for all proposed Key Personnel.

4. Oral Interviews (optional) - 30 points

If an award is not made based on the written evaluations alone oral interviews may be conducted with the top-ranked proposers. The County may choose to use different criteria for the interview. Final selection, if any, would then be made based on the sum total of the written evaluation and oral interview scores. Failure of a Proposer or any proposed team member to participate in the interview process may result in the Proposer's disqualification from further consideration.

2.3 Negotiations

After the selection of the to-ranked firm, the County will enter into negotiations with that firm to finalize the scope of work, schedule and costs. Negotiations will be completed within **twenty-one (21) calendar days** from the Notice of Selection. IF the County is unsuccessful in negotiation these matters with the selected firm, the County reserves the option to terminate negotiations and proceed with the next highest ranked firm.

2.4 Estimated Budget

The estimated not to exceed budget for the project is \$1,035,000

2.5 Responsive and Responsible

Responsive

The County will consider all the material submitted by the Proposer, and other evidence it may obtain otherwise, to determine whether the Proposer is in compliance with the terms and conditions set forth in this RFP.

Responsible

In determining the responsibility of the Proposer, the County may consider:

- the ability, capacity and skill to perform the Contract and provide the service required;
- the character, integrity, reputation, judgment and efficiency;
- financial resources to perform the Contract properly and within the times proposed;
- the quality and timeliness of performance on previous contracts with the County and other agencies, including, but not limited to, the effort necessarily expended by the County and other agencies in securing satisfactory performance and resolving claims;
- compliance with federal, state and local laws and ordinances relating to public contracts;
- other information having a bearing on the decision to award the Contract.

Failure of a Proposer to be deemed responsible or responsive may result in the rejection of a proposal.

2.6 Responsible Contracting

A. Contractor Responsibility – Compliance with Federal, State and Local Law

For all contracts with a value of \$100,000 or more, the selected Proposer must meet the requirements set forth in King County Code 2.93.120 regarding historic compliance with environmental, worker safety, and labor and human trafficking laws. Historic compliance is defined as a minimum of three (3) years preceding the submittal date for the solicitation.

The County shall conduct a review in order to determine the selected Proposer's responsibility related to these areas. Failure to fully answer any responsibility question, or otherwise be out of compliance with the requirements of the code as determined by the County, shall eliminate the Proposer from consideration of award.

- B. Note that the County will issue the "[King County Responsibility Detail & Attestation Form](#)" to the top ranked Proposer, who will then complete the form and return it to the County within a time period to be specified in the transmittal.

2.7 Financial Resources and Auditing

If requested by the County, prior to the award of a contract, the Proposer shall submit proof of adequate financial resources available to carry out the execution and completion of work required by this contract.

King County reserves the right to audit the Contractor throughout the term of this contract to assure the Contractor's financial fitness to perform and comply with all terms and conditions contained within this contract. King County will be the sole judge in determining the Contractor's financial fitness in carrying out the terms of this contract.

News releases pertaining to this RFP, the services, or the project to which it relates, shall not be made without prior approval by and then only in coordination with King County.

2.8 Public Disclosure of Proposals

This procurement is subject to the Washington Public Records Act, RCW (Revised Code of Washington) 42.56 et seq. Proposals submitted under this RFP shall be considered public documents unless the documents are exempt under the public disclosure laws. After a decision to award the contract has been made, the proposals shall be available for inspection and copying by the public.

If a Proposer considers any portion of its proposal to be protected under the law, the Proposer shall clearly identify each such portion with words such as "CONFIDENTIAL," "PROPRIETARY" or "BUSINESS SECRET." If the County determines that the material is not exempt from public disclosure law, the County will notify the Proposer of the request and allow the Proposer ten (10) Days to take whatever action it deems necessary to protect its interests. If the Proposer does not take such action within said period, the County will release the portions of the proposal deemed subject to disclosure. By submitting a proposal, the Proposer assents to the procedure outlined in this subsection and shall have no claim against the County on account taken under such procedure.

Type of exemption	Beginning page / location	Ending page / location

SECTION 3 SCOPE OF WORK

3.1 Introduction

The purpose of this contract is to provide Metro Transit assistance in meeting the requirements of King County Council motions concerning Metro’s long-term funding, and meeting the region’s future mobility needs in an equitable manner. Metro is seeking consultant assistance to provide planning, analysis and community engagement support for the development of a Mobility Framework for the equitable implementation of mobility services, in response to King County Motion 15253, and a Regional Planning effort and funding strategy to address implementation of METRO CONNECTS, King County Metro’s long range plan, in response to King County Motion 15252. Figure 1 illustrates how these two work efforts will interact and inform future policy and budget development. This effort presents a transformative opportunity to develop a coordinated mobility framework and regional funding strategy that sets the overarching strategic direction for the agency. Our goals are:

- a. To ensure our policies, services, programs and investment strategies put people first, support the advancement of equity and social justice, meet the mobility needs of the county, and promote sustainability by reducing regional greenhouse gas emissions.
- b. To develop an ambitious yet realistic plan to fund and implement the METRO CONNECTS vision in a way that prioritizes advancing equity and sustainability.

Metro Transit: Mobility Framework & Regional Planning

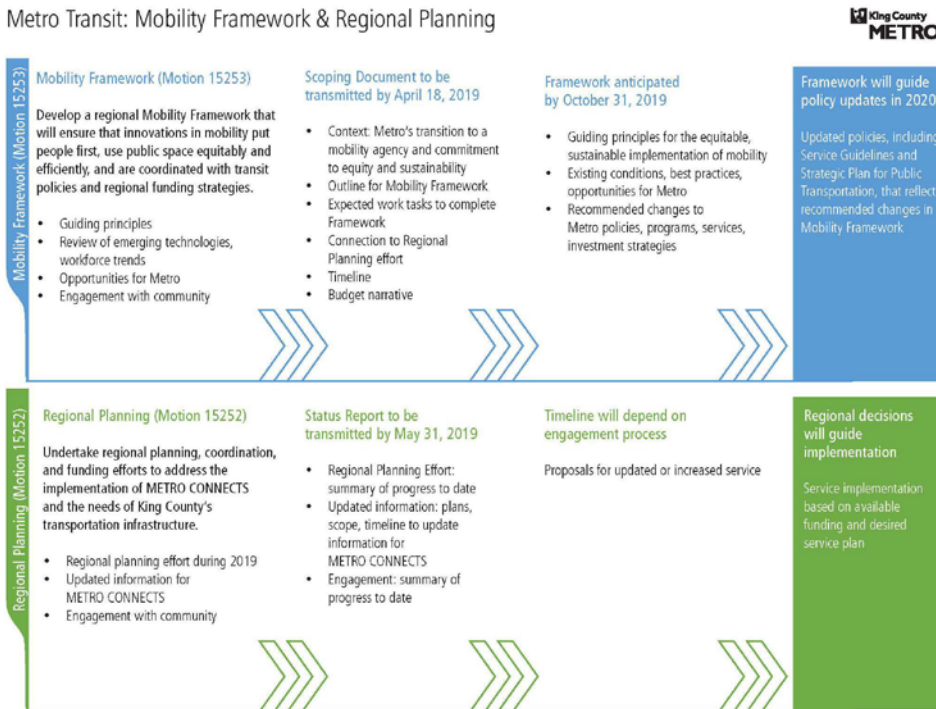


Figure 1: Interaction between Mobility Framework, Regional Planning, and Metro's Policy & Budget

A. King County Motion 15253 (Mobility Framework)

With Motion 15253, passed on 11/13/2018, the King County Council directed Metro to develop a framework for the equitable implementation of mobility. Metro will use this opportunity to build on existing work, identify guiding principles that support our pro-equity philosophy, and articulate potential actions to better operate to improve outcomes for historically underserved populations.

The motion calls for a planning effort during 2019 to develop a framework for the equitable implementation of innovations in transit service and mobility that put people first, use public space equitably and efficiently, and are coordinated with transit policies and regional funding strategies. The motion requires Metro to review existing technologies and best practices, evaluate implications of innovations on Metro service, and coordinate with the efforts of Motion 15252 below. It directs Metro to review policies on the use of public space, such as street right-of-way and sidewalks, and examine workforce trends and how changes in mobility could affect Metro's workforce. The motion also requires outreach and engagement with regional partners, transit riders, and local communities, including but not limited to low-income populations, communities of color, immigrants and refugees, and limited English speaking populations. Finally, the motion requires Metro to consider potential changes to policy documents in alignment with the mobility framework.

Metro intends for the final framework to be a report that includes:

1. Guiding principles for the equitable implementation of mobility in King County.
2. Key equity and sustainability outcomes, and a description of King County's mobility and demographic trends.
3. An Existing Conditions, Best Practices, and Opportunities and Implications for Metro section, organized by topic area, with a concise summary of:
 - How Metro's current policies, programs and/or services, and investment strategies do or do not contribute to equitable mobility, best practices for advancing equity, and opportunities for Metro to improve current practices to achieve equitable outcomes in its service network.
 - How Metro's policies, programs and/or services, and investment strategies do or do not contribute to sustainability by reducing regional greenhouse gas (GHG) emissions from transportation, best practices for achieving greenhouse gas emission reductions, and opportunities for Metro to improve current practices to reduce GHG emissions regionally.
4. Recommended changes to Metro policies, programs, services, and investment strategies to better deliver equitable, sustainable mobility.

B. King County Motion 15252 (Regional Planning)

Motion 15252, passed on 11/13/2018, calls for a regional planning effort during 2019 to address the implementation of METRO CONNECTS, Metro's long-range plan. The intent is for this effort to include:

1. Regional Planning Effort to address METRO CONNECTS implementation and infrastructure needs.
2. Updated information to supplement METRO CONNECTS to adjust for increased population growth, congestion, inflation and construction costs, as well as information on updated regional mobility needs and innovations in transportation.
3. Engagement with King County Council, regional leaders, and the community to develop a regional funding plan to implement METRO CONNECTS and explore ways to support ongoing maintenance of King County's transportation infrastructure.

3.2 Existing Policies and Plans

A. METRO CONNECTS

Metro Transit adopted METRO CONNECTS¹ in 2017 as its long-range plan. The plan provides the future vision for the agency, and identifies future service, capital and workforce needs to meet the region's transportation goals, as well as estimates of the total costs and partner support needed to achieve the plan. The plan involved a broad range of the community, elected leaders, and technical advisors. The plan included detailed service recommendations and capital expenditures for 2025 and 2040 time horizons. Since adoption of the plan in early 2017, Metro Transit has incorporated METRO CONNECTS into the budget process. Recent budgets and the 10 year business plan and Capital Improvement Program have included expenditures identified in METRO CONNECTS. However, current revenues are not sufficient to provide for the full network identified in METRO CONNECTS.

B. Strategic Plan for Transportation 2011-2021 and Service Guidelines

Metro's Strategic Plan was updated in 2015 and describes a vision for the future of King County's public transportation system, and sets objectives, goals, and strategies for getting there. Metro's Service Guidelines, a part of the strategic plan, are used to evaluate, design and modify transit service to meet changing needs, including an evaluation of productivity, social equity, and geographic value. Outcomes of work completed under this contract work will provide direction and guidance for these updates, planned for 2020, encompassing all of Metro's services.

C. King County Strategic Plan for Equity and Social Justice

As defined in King County's Strategic Plan for Equity and Social Justice, equity is the full and equal access to opportunities, power and resources so that all people have their full

¹ METRO CONNECTS. 2017. King County Metro. <http://www.kcmetrovision.org/>

potential and thrive. Equity is an ardent journey toward well-being as defined by those most negatively affected.²

King County Strategic Plan for Equity & Social Justice

In 2016, King County completed the Strategic Plan for Equity and Social Justice³ (ESJ Plan). The County's ESJ Plan commits us to being pro-equity, which means being racially just and inclusive, and consistently taking action to eliminate the root causes of inequities. The ESJ Plan guides the County's pro-equity policy direction, decision-making and workplace and workforce systems and practices to advance equity and social justice within County Government and in partnership with communities.

How we approach our work is just as important as what we seek to accomplish. The plan calls for King County to apply a theory of change that shifts the County away from policies and practices that *react* to problems and crises, towards investments that address root causes of inequities. Overall strategies are to invest upstream where needs are greatest, in employees, and in community partnerships, with accountable and transparent leadership.

Our 5 core goals for achieving comprehensive equity in transit within King County are:

1. Invest equitably and focus on measurable results and outcomes
2. Partner with other agencies to increase equitable access to and enhanced opportunities for multimodal mobility
3. Create affordable and effective transportation options for all people
4. As an employer, create equitable access to quality jobs, workforce development and equitable contracting
5. Promote healthy, safe, sustainable and inclusive communities

D. Equity and Social Justice in Consultant Work

There is strong direction throughout Metro to support and advance equity and social justice as an ultimate outcome of the work under this contract, and assessment and identification of potential equity needs and impacts will need to be conducted throughout every task and deliverable. The County seeks Proposers with demonstrated experience in equity and social justice issues who understand this and share a similar commitment to equity and social justice (ESJ).

Mobility is more than a privilege or a service: it is a basic human right. Without it, communities and individuals cannot access the opportunities needed to thrive in society, and as a society and a public service agency, we cannot ensure equitable outcomes for different communities. While King County is a great place for many to live, learn, work, and play, deep and persistent inequities, especially by race and place, prevent individuals from reaching their full potential and threaten our collective prosperity. Ultimately equity

² King County Equity and Social Justice Strategic Plan, P. 17

³ <https://kingcounty.gov/elected/executive/equity-social-justice/strategic-plan.aspx>

is a superior growth model that benefits the whole region. The vision for this work is to result in a plan and strategy that:

1. Prioritizes equitable access to education, jobs and services that allow all our residents to fulfil their full potential
2. Assesses immediate needs of low-income populations, communities of color, immigrants and refugees, and limited English speaking populations (priority populations), including engagement of communities for well-planned and targeted transportation improvements
3. Creates shared learning and education between Metro and the community
4. Elevates opportunities for community-led decision making
5. Interfaces traditional transportation indicators (demographic, socioeconomic, destination, commute time/distance, vehicle ownership, and transportation cost data) with place-based qualitative information
6. Acknowledges that transportation and land use are inter-related and helps Metro advance King County's significant investment in equitable Transit Oriented Development (TOD) in a way that supports current and future residents, land use goals, economic development, cultural identity preservation strategies and community development, and achieves place based solutions without displacement and gentrification
7. Analyzes, evaluates and compares different transportation modes and service models based on their ability to enhance mobility, improve health and increase economic opportunities for low-income communities of color, immigrants and refugees
8. Incorporate metrics that include affordability by place and mode, accessibility and modes, efficiency, reliability, safety, health, pollution reduction, connections to job centers, transportation-related employment opportunities, connectivity, and economic development opportunities.
9. Aligns transportation funding to specific equity and mobility outcomes
10. Incorporates targeted universalism in investments in accessibility for people with disabilities

E. Sustainability and the Strategic Climate Action Plan

In 2015, the King County Executive recommended and the King County Council unanimously approved the Strategic Climate Action Plan (SCAP). The 2015 SCAP is a five-year blueprint for County action to confront climate change, integrating climate change into all areas of County operations and its work in the community. The 2015 SCAP guides County work to achieve ambitious GHG emissions reduction targets countywide and from government operations, prepare for the impacts of a changing climate, and ensure that King County continues to lead on climate action. The 2015 SCAP established specific measures for reducing transportation emissions, including

measures for ridership expansion, vehicle miles travelled, and countywide drive alone rate.

King County agencies are working in 2019 to update the SCAP. The Executive will transmit an updated 2020 SCAP to Council in June of 2020. Metro Transit is the goal area lead for updating the community scale transportation measures and identifying opportunities for achieving these goals. There are two key priorities:

1. Revising the transportation services goals to better align with METRO CONNECTS and the regional mobility vision (i.e. a combined regional target).
2. Identifying what opportunities exist for Metro and King County to support achieving reductions in regional vehicles miles traveled (VMT).

F. Sustainability and Climate Action Elements in Consultant Work

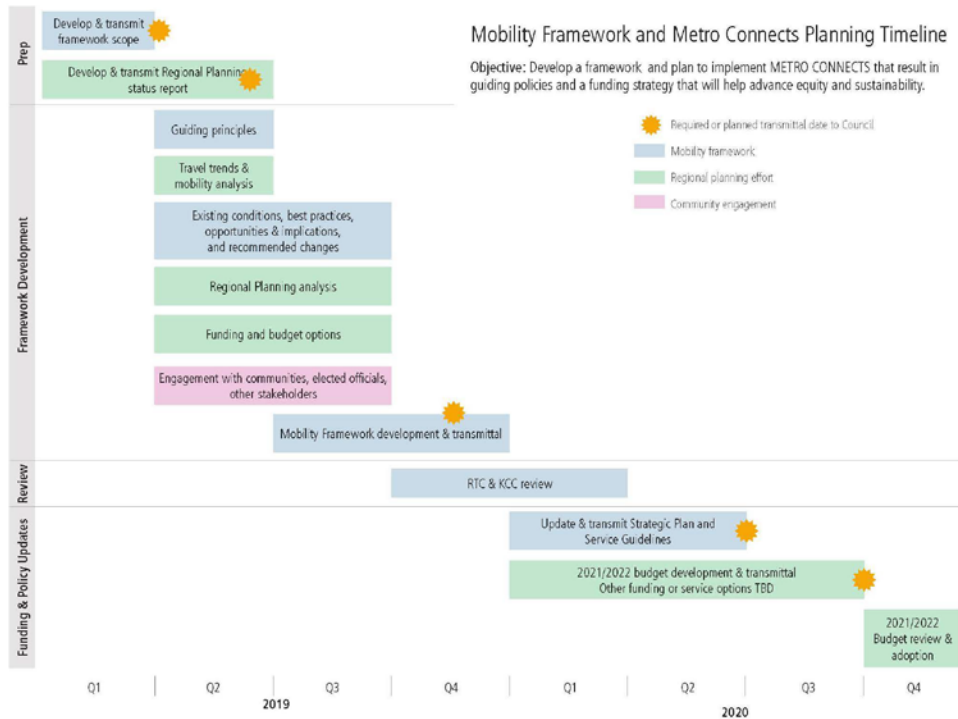
Supporting climate action and greenhouse gas reductions regionally and within county operations is a priority for the County, and evaluation of climate impacts, opportunities and strategies will be conducted throughout many tasks and deliverables in this project. Metro is seeking consultant input to:

1. Evaluate how current policies are and are not on track to meet reductions in regional GHG emissions.
2. Identify new opportunities and investment strategies based on best practice nationally and internationally and building on work regionally by the PSRC and Puget Sound Clean Air Agency, among others, to achieve reduction targets for regional GHG emissions from transportation, including reduction in vehicle miles traveled (VMT) and drive-alone rates.

The evaluation of opportunities will include elements that Metro has direct control over, as well as elements that Metro does not control but could play a key influencer role, such as promoting compact land-use development and affordable housing. The output of this Framework analysis will inform the update to the Transportation and Land Use goal area for the 2020 King County Strategic Climate Action plan. It will also be important to identify potential trade-offs and opportunities for alignment between the County's climate goals, equity goals, and other goal areas. The County seeks Proposers who have experience in evaluating and understanding sustainability and greenhouse gas emission reduction implications of transit and transportation services, programs, policies and investment strategies, as well as experience identifying opportunities and tradeoffs between sustainability, equity and other goal areas.

3.3 Estimated Project Timeline

The core elements of this project will be conducted in 2019, according to the following rough timeline:



3.4 Work Order Contract

Work performed under this contract will consist of individually negotiated work orders, due to the need to respond to two distinct Council motions and because some parts of the work required to support this effort may change depending on feedback from elected leaders and the community. Each request for service will be made in writing. Work will be based on a project scope that may involve any one or a combination of disciplines and expertise. The Consultant should be capable of adding disciplines as necessary to meet the needs of specific work orders. The Consultant will be expected to manage multiple work orders simultaneously and coordinate the work efforts of its staff and sub consultants. There is no guarantee that all services in this scope of work will be used.

As described in the Scope of Work, a consultant may be requested to support the development of these efforts by providing services such as policy and existing conditions review, best practices and opportunities identification, transportation modeling, technical and financial analysis, meeting facilitation; stakeholder, community-based organization, and community engagement; and development of engagement materials and project documents.

3.5 Scope of Work

The scope of work is separated into 7 primary elements to complete necessary work for both the Mobility Framework and Regional Planning effort:

1. Project Management
2. Travel Trends & Mobility
3. Existing Conditions, Best Practices, and Implications and Opportunities Review
4. Service & Capital Costs
5. Financial
6. Community Engagement
7. Document Development

Specific scope and deliverables for these elements will be negotiated via individual work orders under this contract, and all deliverables will be subject to the approval of the Metro Project Manager.

1. Project Management

Metro staff will be responsible for managing the progress and completion of the overall Mobility Framework and Regional Planning effort. The consultant will be responsible for managing project tasks, controlling costs, maintaining schedule, and providing quality products for all consultant activities appropriate to the goals and needs of these efforts. The Consultant shall provide expertise in disciplines necessary to implement work orders authorized under this contract. The Consultant shall organize, manage and coordinate the disciplines required to accomplish each authorized work order, and shall provide project management and contract administration services to facilitate efficient progress on the scope of work. It is expected that the consultant team will designate a project manager for each work order. Project management will involve preparation of all related project management documents, reporting to Metro staff, management and stakeholders.

A. Examples of consultant work envisioned to support this element:

- 1) Develop a work plan for the management of each work order. This may include, but is not limited to the following:
 - Scope of Work
 - Budget control plan
 - Project baseline schedule
 - Team organization and communication plan
 - QA/QC Plan
 - Risk management plan

- 2) Schedule, lead, participate and document a project coordination meeting for each work order. Work with Metro to develop the agenda and facilitate the meeting. Prepare and distribute meeting notice, agenda and minutes.
- 3) Develop templates to facilitate Metro staff review of draft work products, and methods for compiling and addressing comments and feedback
- 4) Prepare and submit monthly progress reports for each active work order per the prescribed county format. The progress report will identify specific task accomplishments during the reporting period and planned activities for the next billing period.
- 5) Refine the project objective and scope of work for each work order, in consultation with Metro and other pertinent agency stakeholders.
- 6) Attend County program/project meetings as needed

B. Examples of potential consultant deliverables that support this element:

- 1) Draft and final copies of project work plans
- 2) Project coordination meeting notices, agendas, minutes
- 3) Monthly progress reports
- 4) Expenditure report
- 5) Budget and expenditure management
- 6) Updated schedule
- 7) Risk management plan

2. Travel Trends and Mobility Element

This element will assess current conditions and relevant future trends and patterns that impact ridership and mobility and identify implications for Metro's ability to deliver equitable mobility and reduce regional greenhouse gas emissions from transportation. This includes, but is not limited to, an assessment of travel demand patterns, job growth, population growth, customer preferences and community expectations of Metro, and other elements that impact ridership such as gas prices, car ownership, availability of alternative modes other than the private car, land use zoning and development including affordable housing and equitable transit oriented development, and parking pricing and availability.

This element will identify overall risks and opportunities to deliver equitable mobility and reduce greenhouse gas emissions. Deliverables from this work will also respond to both Motions 15252 and 15253. For 15252, they will be used to update METRO CONNECTS information and provide context for existing conditions evaluation and identification of opportunities in Element 3 and background information and materials to support public and community engagement in Element 6. For 15253, this analysis will inform a high-level summary, included in the final framework, of mobility trends and their implications for Metro's ability to deliver equitable mobility.

This element will identify opportunities within direct control of Metro, as well as opportunities that require partnership with local jurisdictions (i.e. land use zoning).

A. Examples of consultant work envisioned to support this element:

1. Collect, synthesize and report on themes and implications of existing and future conditions in King County, including but not limited to current and forecast travel demand and trip densities, current and forecast residential and employment densities, current and projected population demographics, current transit travel times between destinations and comparison of transit and auto travel times.
2. Review specific conditions, trends and mobility needs for people of color, low income and other priority populations for ESJ.
3. Identify customer preferences, expectations, and opportunities to improve mobility and increase transit use via review of existing Metro survey and outreach data and/or gathering of new data as needed via interviews, focus groups or surveys.
4. Evaluate current progress and update projections for meeting King County and Metro's targets in the Strategic Climate Action Plan for reducing regional GHG emissions from transportation, including ridership, VMT reduction and drive-alone rate. Identify opportunities Metro and/or partners could take to reduce regional transportation emissions and encourage more compact mixed land use development, including transit oriented development.
5. Develop case studies as needed to better understand impacts of new Sound Transit Link services or evaluate needs and opportunities for specific demographics or geographies.
6. Evaluate current progress and update forecasts for key performance measures identified in METRO CONNECTS, including metrics for the county as a whole and for specific demographics and geographies.
7. Evaluate whether changes in population and development growth patterns, land use zoning, significant public investments in transportation, demographics or travel trends allow METRO CONNECTS investments to meet identified targets.
8. Identify opportunities and high level recommendations on how to deliver equitable mobility and reduce regional GHG emissions

B. Examples of potential consultant deliverables to support this element:

1. Summary report of current and future trends and implications and changes needed for transit to remain or become more competitive with other modes of travel, support equitable mobility, and reduce greenhouse gas emissions.
2. Summary report of customer and community expectations and preferences.

3. Current status and updated forecasts for METRO CONNECTS performance measures based on updated population & job growth data.
4. Derivative works (one-pagers, graphs, infographics, maps) that summarize findings to communicate to management, Metro staff, stakeholders, or public.
5. Underlying data, spreadsheets, GIS databases and other information sources and tools developed to complete this work.

3. Existing Conditions, Best Practices, Opportunities & Implications Element

This element will examine current conditions and practices, national best practices, and opportunities and implications for Metro on key topics to identify how Metro's policies, services, programs and investment strategies:

- a) Do or do not contribute to equitable mobility, and how they could be designed to better advance equitable outcomes; and
- b) Do or do not contribute to sustainable mobility, in terms of reducing regional greenhouse gas emissions from transportation, and what opportunities there are to advance goals to reduce emissions.

Each topic area will include both an equity impact review and a sustainability/climate impact review.

Metro intends for the final framework to include an "Existing Conditions, Best Practices, and Opportunities & Implications for Metro" section, organized by topic area. Each topic area is envisioned to include:

- a) How that topic area's current state does or does not advance equity
- b) How that topic area's current state does or does not advance sustainability and reduce GHG emissions
- c) Concise summary of best practices for advancing equity through that topic area
- d) Concise summary of best practices for advancing sustainability and reducing GHG emissions through that topic area
- e) Concise summary of opportunities and implications for Metro to advance equity through that topic area
- f) Concise summary of opportunities and implications for Metro to advance sustainability and reduce GHG emissions through that topic area

Consultant support is anticipated to provide a series of internal technical memos that are then used as the basis for concise and digestible one page summaries of each of the above. Providing both technical analysis and clear concise writing appropriate for a general audience is important.

Below are anticipated topics that will be addressed as part of this element:

- **Mobility services**, including Metro's existing mix and future opportunities for fixed-route, flexible, and innovative mobility services, as well as Metro's approach to evaluating and choosing the appropriate mix of services.

- **Capital program**, including Metro's major programs, including developing additional base capacity and implementing the transportation improvements needed to improve speed and reliability and expand RapidRide.
- **Emerging technologies** that compete with transit or support mobility as a service and multimodal integration.
- **Facilities integration** to support transfers and multimodal integration in region's fixed route network.
- **Policies for the allocation of public space**, including streets, sidewalks, transit stops, station areas, curb space, and right-of-way. This section will also include information on land use patterns adjacent to transit corridors, including opportunities for affordable, equitable transit-oriented development.
- **Access to transit**, including biking, walking, and other travel options.
- **Fares**, including fare structure and programs, fare payment, and fare enforcement.
- **Workforce trends**, including general industry trends and practices to support and improve equitable outcomes within its workforce and provide high quality service.

This element will support and inform the other elements of the Mobility Framework and Regional Planning Effort, such as recommended changes to Metro's existing policies, services, programs, and investment strategies to better deliver equitable mobility. It will also inform and support engagement and outreach. It will also be important to identify potential trade-offs and opportunities for alignment between the County's climate goals, equity goals, and other goal areas.

A. Examples of consultant work envisioned to support this element:

For each of the topic areas below, example tasks may include:

1. Review of existing conditions, current practices and staff identified needs and issue areas focusing on how existing policies, programs, services, and investment strategy for each topic area impact or advance equitable outcomes
2. Consolidation of best practices, focusing on best practices for advancing equitable outcomes through policies, programs, services, and investment strategies relevant to each topic area
3. Identification of implications and opportunities for Metro, including how Metro could improve its policy, programs, services, or investment
4. Identification of feasibility, potential risks, and constraints that may limit Metro's ability to implement or advance recommended opportunities, including review of Metro's policy documents for potential barriers; identification of potential changes or revisions to overcome barriers

5. Equity impact review, including:
 - a. Evaluate the equity impact of current policies, practices, and any best practices or recommendations that do not fall within the topic areas above, to identify who is impacted and how
 - b. Summarize industry research and evaluate existing data to identify important factors that support equitable transportation outcomes
 - c. Summarize industry research and evaluate existing data to identify important factors that support equitable transportation outcomes
 - d. Develop methods for measuring progress towards equitable mobility outcomes
6. Sustainability/climate review, including:
 - a. Evaluate the GHG impact of current policies, practices, and any best practices or recommendations that do not fall within the topic areas above, to identify evaluate potential impacts on county-wide greenhouse gas emissions
 - b. Summarize industry research and evaluate existing data to identify important factors that support reduction in countywide GHG emissions
 - c. Develop recommendations for updates to the King County Strategic Climate Action Plan 2020 Update

B. Examples of potential consultant deliverables that support this element

1. Summary of existing conditions, policies and case studies for each topic area as described above, focused on how current policies, programs, services and high level investment strategies have impacted equitable mobility, sustainability and GHG reduction
2. Summary of best practices and emerging trends for policies, programs, services, and high level investment strategies in each of the topic areas
3. Summary of key opportunities and recommendations for each of the topic areas
4. Derivative works (one-pagers, graphs, infographics, maps) that summarize findings to communicate to management, Metro staff, stakeholders, or public
5. Underlying data, spreadsheets, GIS databases and other information sources and tools developed to complete this work, as appropriate

4. Service & Capital Cost Element

METRO CONNECTS envisioned an additional 2.5 million service hours annually, as well as \$11 billion in capital expenditures. The range of capital investments covers park and rides, transit only lanes, non-motorized investments, and others, and

assumed a mix of projects paid for by Metro Transit and by partnerships with local jurisdictions.

In METRO CONNECTS these investments are identified for two time horizons (2025, and until 2040). Inflation and shifting capital construction costs, and refined understanding of future service costs have resulted in a need to re-examine cost assumptions used for METRO CONNECTS to determine feasibility and a better understanding of total resource needs. Feasibility will include current capital costs, local participation, and the ability to fully fund operating corridors. Pending discussions with Metro staff, it may be necessary to amend the 2025 time point to 2030.

The King County Office of Economic and Forecast Analysis produces many of the forecast elements used in this analysis. In addition, Sound Transit has developed forecasts for many indicators used in this analysis. Nonetheless, there may be indicators for which forecasts will need to be developed.

A. Examples of consultant work envisioned to support this element:

2. Update METRO CONNECTS service & capital cost assumptions
 - i. Evaluate and update capital cost assumptions used for account for inflation and increasing capital costs, including updated life cycle costs of capital facilities necessary to keep the system in a state of good repair
 - ii. Review necessary materials & engage with Metro staff to develop updated cost information for Metro's Fleet, Technology and Fixed Asset portfolios
 - iii. Incorporate updated service hour cost estimates for METRO CONNECTS developed by Metro staff
 - iv. Identify & summarize overall key cost drivers and areas of increased costs compared to original assumptions
3. Update METRO CONNECTS total service & capital costs
 - i. Apply updated cost assumptions to METRO CONNECTS identified service network, capital projects and capital project categories
 - ii. As appropriate, update any METRO CONNECTS project lists to reflect current planning, timeline, or standards; may result in changes to overall cost estimates or assumptions

B. Examples of potential consultant deliverables that support this element

1. Updated service & capital cost assumptions, including necessary tables and documentation of methodology
2. Report outlining updated total service and capital costs for 2025 and 2040

3. Summary documentation of updated assumptions, total costs, and implications, to share with subject matter experts, Metro management and stakeholders

5. Community Engagement Element

Development of a robust and equitable Mobility Framework and Regional Planning effort depends on strong community engagement. The consultant shall provide services and support for community and employee engagement and outreach; integrated communications and customer information; creative services needs for development of project materials; and assistance with strategic partnerships and government relations activities as needed. Metro will draft an overall engagement plan that the consulting team will work with Metro staff to finalize and execute. The plan will likely include interviews, workshops, facilitation, and contracting with community-based organizations to ensure process equity in our engagement with the community. Work for this element will build on existing efforts, such as Metro's rider/non-rider survey and the engagement that is underway to develop an income-based fare program.

Outreach and engagement must meet the County's goals for public engagement. At a minimum, the process should be:

- Customized:** Opportunities for the public to shape the outcome are tailored to the size and scope of the change and who will be impacted
- Equitable:** Strive to inform and hear from all communities that will be impacted.
- Informative:** Information and ways to participate are clear, understandable and accessible
- Transparent:** Describe input, planning and decision making process
- Responsive:** At each step, show how public feedback has informed County decisions.
- Concise:** Communication materials are brief, clear, and meaningful

All communication strategies shall be sensitive to and contain elements to address the diverse, multi-lingual population of the region and always take into account all aspects of Equity and Social Justice (ESJ). Communications and engagement deliverables should be consistent with the County's ESJ Strategic Plan goal area commitments, Equity Impact Review, and Metro and King County Language access requirements.

A. Examples of consultant work envisioned to support this element:

2. Engagement Planning

- i. Revise, finalize, and coordinate the implementation of an engagement and outreach plan for stakeholder, community and employee engagement, including:
 - a. Stakeholder identification, research and analysis
 - b. Communication and engagement strategy
 - c. Alignment with and support of the County's Equity and Social Justice Strategic Plan⁴ by all elements of the plan
- ii. Work with County staff and members of the project team to evaluate needs and priorities of most negatively impacted communities, jurisdictions or geographies to develop and refine overall engagement plan and activities
- iii. Develop overall outreach calendar with proposed public meeting dates & locations
- iv. Complete equity and social justice analysis based engagement approach, including focused engagement strategies with priority populations, including communities of color, immigrants and refugees, limited English-speaking communities, and low-income populations
- v. Coordination with other planning and communications staff
- vi. Proactively look for opportunities to engage with stakeholders and share project information and updates
- vii. Work and potentially contract with local Community Based Organizations (CBOs) to plan and implement engagement
- viii. Proactively look for opportunities to engage with stakeholders and share project information and updates
- ix. Develop a post-engagement communications strategy to raise awareness of the Mobility Framework and Regional Planning effort
- x. Develop outreach metrics, goals, outcomes and measures, including development and implementation of tracking method
- xi. Develop a contracting/partnership/briefing approach for working with and engaging CBOs, trusted advocates and strategic organizational partners

3. Program Communications

- i. Support template development, coordination and content development for internal METRO updates on these two efforts

⁴ <https://kingcounty.gov/elected/executive/equity-social-justice.aspx>

- ii. Work with staff to research issues raised by community members, draft responses and provide responses to community members in a timely manner
- iii. Represent METRO at public events and meetings
- iv. Consult with Metro regarding appropriate message and materials to use in public engagement efforts
- v. Provide language translation for key outreach and engagement materials

4. Government Relations

- i. Assist with the development of an overall government relations strategy, as needed
- ii. Assist with implementation of targeted government affairs strategies around emerging issues as needed; including drafting key message, identifying audiences, and convening and facilitating meetings, as needed
- iii. Assist Government Affairs manager to connect the work of this project with broader government relations strategy

5. Engagement

- i. Facilitate stakeholder meetings and meetings with regional leaders and partner jurisdictions to inform the development of Mobility Framework and Regional Planning effort
- ii. Conduct interviews, as well as focus groups and surveys, as needed, to understand customer, public and stakeholder needs and priorities
- iii. Schedule meetings, prepare agendas, take notes and participate in existing relevant existing community meetings and other meetings for key stakeholder groups
- iv. Execute and document minority/low-income/LEP engagement effort
- v. Utilize King County's online engagement tool, PublicInput, as needed, to share information and gather feedback (such as surveys, online open houses, etc)
- vi. Coordinate community and stakeholder workshops, meetings, briefings, activities and events, including:
 - a. Meeting design
 - b. Planning
 - c. Reserving location (s)
 - d. Preparing invitations, mailings or other content to publicize opportunities to participate
 - e. Support preparation of display boards and presentations as needed

6. Data collection and analysis

- i. Maintain database for public, businesses, and stakeholder contact information, notifications, interactions, enquires, issues and issue resolutions
- ii. Analyze and summarize various public involvement activities including stakeholder feedback and public input on key areas of concern

7. Collateral Development

- i. Develop overall project style guide
- ii. Develop standard design criteria/style guide for creation of maps, information materials and other products
- iii. Develop template outreach materials, including
 - a. Flyers/mailers
 - b. Project/Metro fact sheets
 - c. Survey questions (as needed)
 - d. PowerPoint presentations
 - e. Meeting agendas and handouts
- iv. Prepare engagement summaries and evaluations
- v. Develop infographics showing key findings, summary information or mobility framework elements
- vi. Assist with design and development of public involvement materials, including maps, infographics, videos, display boards, fact sheets

B. Examples of potential consultant deliverables that support this element

1. Comprehensive engagement plan
2. Document templates and style guide(s)
3. Focus group/interview facilitation guide(s) and after summaries
4. Survey results and summaries (if needed)
5. Minority/LEP outreach documentation
6. Meeting agendas, handouts, summaries and notes

6. Financial Element

The Regional Planning Effort will describe the investments and operations necessary to achieve the METRO CONNECTS goals with inputs from multiple elements of this project.

- The financial element will present the specific revenue sources and operating and capital expenditures necessary to achieve those goals.

- The capital and service analysis will provide background information to develop package(s) for potential funding.

The work in developing the financial element will be shared between the consulting team and Metro staff. Metro will conduct the financial modelling necessary to determine needs above current resources, but the consulting team will work closely with Metro staff to refine the previous estimates and partnership contributions. Metro Transit will use internal resources to identify revenue sources and will evaluate those revenue sources for economic efficiency and equity. These revenue sources will be reviewed in the community engagement processes described above and options for financing the goals of the Metro Connect package will be developed. Metro Transit staff and the consulting team will work to develop revenue options which meet the County's equity and climate goals as described above.

Metro staff and the consulting team, in coordination with the King County Office of Economic and Financial Analysis (OEFA), will develop revenue forecasts for each of the identified and potential revenue sources to be used as inputs into the financial model developed by Metro. Some of the potential revenue sources do not have existing revenue forecasts from OEFA, so the consulting team will need to work with Metro staff to develop forecasts. Metro staff and the consulting team will develop funding packages to accompany the identified needs above current resources identified by the consulting team. It is anticipated that any funding packages will identify high level investment categories and strategies, and will not necessarily involve a detailed project or investment list. The distribution and use of these funding plans is yet to be determined.

B. Examples of consultant work envisioned to support this element:

1. Identify and prioritize the service and capital expenditures in METRO CONNECTS.
2. Develop and apply performance measurement methodology that communicates the anticipated benefits of any funded elements, including estimated mobility, equity and greenhouse gas emissions outcomes/performance measures.
3. Review assumptions in financial model and develop revenue forecasts as needed.
4. Assess equity impacts and implications of potential funding scenarios and funding sources.
5. Support financial package development, to potentially include:
 - i. Development of multiple funding and high-level project investment scenarios, including documentation that identifies estimated costs, benefits, and mobility, equity and greenhouse gas emissions outcomes/performance measures

- ii. Development of a screening method and decision-making framework to evaluate funding and high-level project scenarios , consistent with the principles and guidance developed as part of the Mobility Framework, Metro's Strategic Plan King County's Equity and Social Justice Plan, and King County Strategic Climate Action Plan. The framework must align with high level guidance being developed for the Mobility Framework, and may include high level criteria such as ridership potential, Equity impacts, and greenhouse gas reductions
- iii. Meeting facilitation and documentation of minutes and key decisions

C. Examples of potential consultant deliverables that support this element

- 1. Performance measurement methodology
- 2. Tables and summary information for investment scenarios
- 3. Documentation of proposed package costs, feasibility, performance measures, benefits & equity impacts
- 4. Underlying data, spreadsheets, GIS databases and other information sources and tools developed to complete this work, to use as a reference
- 5. Report outlining financial model inputs, and assumptions

7. Document Development Element

The Mobility Framework and Regional Plan will need to be compiled and written in an accessible, succinct manner. This task will involve summarizing complex transportation data, outcomes from previous work efforts, including existing conditions, best practices, outreach and engagement, updated METRO CONNECTS information, updated capital costs and the financial element. It is anticipated that the successful communication of the results of these efforts will require clear, simple, concise overviews, supported by the use of maps, graphics and images. Detailed information and tables, where appropriate, may be made available separately, or via appendices or attachments to the main summary reports and documents.

A. Examples of consultant work envisioned to support this element:

- 1. Developing document templates and graphics standards
- 2. Writing, compiling and organizing plan and report materials
- 3. Writing conclusions and developing clear ways to present the findings in graphical and written formats
- 4. Developing graphics, maps, tables and figures to support document development
- 5. Creating derivative works, including but not limited to 'one-page' summaries of key issue areas, slides and PowerPoint presentations

6. Delivering final documents in appropriate formats (InDesign, Word, or other as appropriate)
7. Assessing and developing action recommendations to advance the implementation and guidance developed through these two efforts

B. Examples of potential consultant deliverables that support this element

1. Mobility Framework report, identifying guiding principles, summary documentation of existing conditions, best practices, & recommended actions
2. Graphics and illustrations of key strategies and opportunities
3. Regional funding plan, documenting high level investment packages and resulting mobility, equity and greenhouse gas emission reduction benefits
4. Derivative and summary documents, including but not limited to 'one-page' summaries of key issue areas, slides and PowerPoint presentations.

PROPOSAL LABEL

Complete the form below (or reasonable facsimile) and affix to the exterior lower left hand corner of the submission envelope(s), box(es), etc.

URGENT – SEALED PROPOSAL ENCLOSED		
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URGENT	 King County	King County Procurement and Payables Section Chinook Building, 3 rd FL CNK-ES-0340 401 Fifth Avenue, Seattle, WA 98104
		RFP No.: 1038-19-VLN
		RFP Title: King County Transit Mobility Framework and Regional Planning Consultant
		Due Date:
		Proposer:
URGENT		

RFP 1038-19-VLN
KC Metro Transit Mobility Framework and
Regional Planning Consultant

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