

**MOTION NO. M2018-139**
**Ratifies and amends an Interlocal Agreement with King County Metro to Support ORCA LIFT Registration**

<b>MEETING:</b>	<b>DATE:</b>	<b>TYPE OF ACTION:</b>	<b>STAFF CONTACT:</b>
Operations and Administrative Committee	11/1/2018	Recommend to Board	Tracy Butler, CFO <b>Lisa Wolterink, Director Fares and Grants</b>
Board	11/15/2018	Final Action	<b>Chuck Sawyer, Fares Administrator</b>

**PROPOSED ACTION**

Ratifies an interlocal agreement with King County Metro Transit for ORCA LIFT registration services in the amount of \$300,000 and approves an amended scope and term extension through 2020 for an additional amount of \$237,000, providing a new total authorized agreement amount not to exceed \$537,000.

**KEY FEATURES SUMMARY**

- Provides funding for King County Metro and Seattle-King County Public Health (Public Health) to implement ORCA LIFT verification and registration for low-income customers in Pierce and Snohomish counties. Public Health provides verification and registration, oversight and support for other verification agencies, including staff training, monitoring and auditing.
- Expands ORCA LIFT awareness and registration to four Washington State Department of Social and Health Services (DSHS) offices in Pierce County and two offices in Snohomish County, making it more convenient for people to sign-up for ORCA LIFT.
- Provides approximately 11,300 ORCA cards with \$10.00 pre-loaded on the cards to incentivize new ORCA LIFT registration at DSHS offices throughout the Sound Transit service area.
- Extends the term of the agreement through 2020, with the option for annual renewals thereafter.

**BACKGROUND**

In November 2014, the Sound Transit Board adopted Resolution 2014-27, amending fare policies to establish a low-income adult fare category and Resolution 2014-28 to establish a reduced "ORCA LIFT" fare for low-income adults on Link light rail service. This ORCA LIFT fare took effect on March 1, 2015 in coordination with implementation of the reduced ORCA LIFT fare on King County Metro's bus services. The rollout of these low-income fares was supported by the ORCA LIFT enrollment program that Metro and Public Health had developed throughout King County.

In November 2015, the Sound Transit Board adopted Resolution 2015-29 establishing a reduced, low-income ORCA LIFT fare on ST Express bus and Sounder rail services. In the fiscal information provided with this resolution, staff informed the Board of its plan to fund expansion of ORCA LIFT registration services in Snohomish and Pierce Counties with annual expenses of up to \$100,000 per year. Subsequent to the adoption of Resolution 2015-29, Sound Transit followed through on this plan by signing a MOU with King County Metro to support expanding ORCA LIFT registration activities in Pierce and Snohomish Counties at a price not to exceed \$100,000 a year for the years 2016 to 2018. However, staff did not take this MOU to the Board for approval at that time.

During the 2018 ST Express Fare Simplification process, the consensus statement reached by Sound Transit’s Fares Restructure Stakeholder Group on the fare proposal supported additional efforts and partnerships focused on low-income riders and disadvantaged communities to help “ensure customers are able to take advantage of the discounted fares available to them.” With adoption of Resolution No. R2018-05 to simplify ST Express bus fares, the Sound Transit Board directed staff to develop a communications plan for ORCA LIFT and other reduced fares by the end of May 2018. The plan, submitted to the Board on May 31, identified target markets and established goals, strategies, timelines, and effectiveness measures. Major elements of this plan were completed in conjunction with implementation of the July 1, 2018 ST Express fare change.

This amended agreement helps improve transit access for low-income customers throughout the Sound Transit service area by making it easier to register for ORCA LIFT. This builds on Metro’s extensive enrollment program in King County and extends through 2020 financial support for human services agencies conducting ORCA LIFT registration in Pierce and Snohomish Counties, and for Public Health’s work in support of these agencies. It also provides additional funding for Public Health staff to train Washington State DSHS staff in Pierce and Snohomish Counties to register their low-income clients for the ORCA LIFT program, as they currently do throughout King County. This will make it more convenient for DSHS clients by enabling them to enroll for state benefits and get an ORCA LIFT card at the same time. Finally, this agreement provides funding to load \$10.00 in E-purse fare value on 11,300 cards issued at DSHS offices in King, Pierce and Snohomish Counties, to provide an incentive for clients to get an ORCA LIFT card and try transit.

Should Sound Transit determine that support for ORCA LIFT registration in Pierce and Snohomish Counties is needed beyond 2020, this agreement provides that the term may be extended by written agreement of both Sound Transit and King County Metro.

**FISCAL INFORMATION**

This action will be funded from the Fare Administration project and is within the authorized project allocation. Sufficient funds remain after approval of this action to fund the remaining project scope.

**Fare Administration**

(in thousands)

Project Phase	Authorized Project Allocation to Date	Board Approvals	This Action	Board Approved Plus Action	Uncommitted / (Shortfall)
Preliminary Engineering	\$1,353	\$1,412		\$1,412	-\$59
Research + Technology	4,089	115	537	652	3,436
<b>Total Current Budget</b>	<b>\$5,441</b>	<b>\$1,527</b>	<b>\$537</b>	<b>\$2,064</b>	<b>\$3,377</b>

Interlocal Agreement Detail King County Metro Transit	Board Approvals to Date	Current Approved Contract Status	Proposed Action	Proposed Total for Board Approval
Contract Amount	\$	\$	\$537	\$537
Contingency			0	0
<b>Total Contract Amount</b>	<b>\$</b>	<b>\$</b>	<b>\$537</b>	<b>\$537</b>
Percent Contingency	0%	0%	0%	0%

**Notes:**

Amounts are expressed in Year of Expenditure \$000s.  
 Board Approvals = Committed To Date + Contingency as of September 30, 2018  
 For detailed project information, see page 62 of the Adopted 2018 Transportation Improvement Plan.

## **SMALL BUSINESS/DBE PARTICIPATION, APPRENTICESHIP UTILIZATION, AND TITLE VI COMPLIANCE**

This interlocal agreement is consistent with the Title VI analyses conducted for the 2016 and 2018 fare changes, and based on the mitigation strategy identified in the 2018 analysis.

## **PUBLIC INVOLVEMENT**

The staff reports for Resolution numbers R2015-27 and R2018-05 describe the public involvement process for the two fare changes that set the stage for this interlocal agreement to increase ORCA LIFT awareness and registration. In particular, Sound Transit's 2018 Fares Restructure Stakeholder Group emphasized the importance of additional efforts by Sound Transit to ensure all customers are able to take advantage of the discounted fares available to them.

## **TIME CONSTRAINTS**

A one-month delay would not create a significant impact to the project schedule.

## **PRIOR BOARD/COMMITTEE ACTIONS**

Resolution R2018-05: Adopted new fare rates and fare structure for ST Express bus service.

Resolution R2015-29: Adopted new fare rates including a new low-income fare for ST Express bus and Sounder commuter rail service.

## **ENVIRONMENTAL REVIEW**

KH 10/25/18

## **LEGAL REVIEW**

AJP 10/26/2018



## **MOTION NO. M2018-139**

A motion of the Board of the Central Puget Sound Regional Transit Authority ratifying an interlocal agreement with King County Metro Transit for ORCA LIFT registration services in the amount of \$300,000 and approving an amended scope and term extension through 2020 for an additional amount of \$237,000, providing a new total authorized agreement amount not to exceed \$537,000.

### **BACKGROUND:**

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**MOTION:**

It is hereby moved by the Board of the Central Puget Sound Regional Transit Authority an interlocal agreement with King County Metro Transit for ORCA LIFT registration services in the amount of \$300,000 is ratified, and an amended scope and term extension through 2020 for an additional amount of \$237,000, providing a new total authorized agreement amount not to exceed \$537,000, is approved.

APPROVED by the Board of the Central Puget Sound Regional Transit Authority at a regular meeting thereof held on November 15, 2018.



Dave Somers  
Board Chair

ATTEST:



Kathryn Flores  
Board Administrator