

Washington Metropolitan Area Transit Authority  
**Board Action/Information Summary**

☒ Action ☐ Information

MEAD Number:  
202236

Resolution:  
☒ Yes ☐ No

**TITLE:**

Framework for Transit Equity: Metrobus Guidelines

**PRESENTATION SUMMARY:**

Action item to request adoption of Metrobus Service Guidelines

**PURPOSE:**

Staff will recommend Board adoption of new Metrobus Service Guidelines.

**DESCRIPTION:**

This presentation will update the Board on changes to the draft Service Guidelines based on comments from Metro's jurisdictional partners and local bus service providers. Summary results from the application of the guidelines to Metrobus Lines/Routes will be provided based on data from July 2019-February 2020. A discussion of how the results can be used to improve bus service and equity will be provided. Staff will recommend Board adoption of Metrobus Service Guidelines to inform future service plans.

Contractors and Interested Parties Involved in the Service Guidelines and Annual Line Performance Work: **AECOM, Foursquare Integrated Transportation Planning, and IBI Group**

**Key Highlights:**

- Metrobus Service guidelines are fundamental to ensuring equitable service across the region and are one of the main building blocks for service planning, budget decisions, and conducting a network redesign. Metrobus Service guidelines have not been updated since 2000.
- Improving Metrobus directly helps address longstanding inequities in the region.
- Updating Metrobus service guidelines was a Bus Transformation Project recommendation and was widely supported by our jurisdictional partners. The guidelines will create a clear and formalized approach to routing, service, and budget decisions.
- Feedback from jurisdictions and local bus providers is incorporated into the service guidelines.

**Background and History:**

In September 2018, Metro, its partner jurisdictions, and local transit agencies launched the Bus Transformation Project (BTP) with the intention to create a “bold, new vision and a collaborative action plan for the future of bus in the region”. Extensive engagement with the general public, project stakeholders, local jurisdictions, regional transportation boards, and the WMATA Board formed the basis for the Executive Steering Committee’s recommendations for the future of bus in the region. The resulting Bus Transformation Strategy was released on September 5, 2019, followed by a comprehensive Action Plan released in December 2019.

In January 2020, the WMATA Board endorsed the strategy and identified ten (10) recommendations for early action, one of which was to update WMATA’s Metrobus Service Guidelines. The full strategy and Action Plan, along with other project documents can be found at [www.bustransformationproject.com](http://www.bustransformationproject.com).

Service Guidelines establish parameters to enable clear decision-making when deciding where to add, adjust, or remove service. Updating the Service Guidelines, which date from February 2000, will

- Create a clear and formalized approach to service and budget decisions, which our jurisdictional partners have requested;
- Assist in providing more equitable service;
- Incorporate customer experience in addition to productivity and cost effectiveness; and
- Align Metrobus with peers across the industry and our local partners.

In September 2020, the Board requested and received a briefing on the proposed update to the draft Service Guidelines and requested that staff conduct additional engagement with the jurisdictions and local bus providers to gain additional input.

## **Discussion:**

Metro staff held two separate meetings in October with the Joint Coordinating Committee and local bus providers to present the draft guidelines and gather feedback. Metro staff is appreciative of the jurisdictional representatives who provided thoughtful feedback and constructive contributions to ensure that the updated guidelines represent the best possible product. Generally, jurisdictional staff were supportive of adopting Metrobus service guidelines and incorporating customer focused measures to balance the existing productivity and cost effectiveness measures. They also noted that the Line Benefit Score delivered another option to assess the value of a line/route to the network beyond productivity and cost efficiency. Jurisdictional staff discussed how the guidelines would be implemented and how they would affect the budget process. They also wanted to ensure that the results would be shared consistently and timely.

## **Summary of Changes to Draft Service Guidelines**

The below summarizes the improvements changes – informed by jurisdictional feedback – to the service types, density tiers, guidelines, and performance metrics from what was shared in draft with the Board and public in September 2020. The updated and final Service Guidelines are provided in Appendix A.

Service Types and Density Tiers (Chapter 2):

- Added “Premium” as subset of the Framework type to designate routes with enhanced features that do not reach the bus rapid transit (BRT) type;

- Renamed density tiers as Tier 1, 2, 3 instead of Tier A, B, C to reduce possibility of confusion from the grading scheme;
- Increased the jobs and population density threshold to 25 jobs and/or population per acre in order to further differentiate between tiers, allowing better comparisons; and
- Removed the number of park and ride spaces from the density tier threshold for commuter routes because many of the lines serve locations with significant parking (Vienna Station, Pentagon) that cannot solely be attributed to bus service.

#### Service Guidelines and Performance Measures (Chapters 3 and 4)

- Revised BRT Tier 1 Span of Service to start earlier and align with Tiers 2 and 3;
- Revised BRT and Framework Headways to reduce maximum headways in Tiers 1 and 2;
- Revised Stop Frequency for Framework Tier 1 routes to align with Tiers 2 and 3;
- Clarified how the parallel corridors guideline would be applied and reduced the distance between parallel corridors in Tier 1 to accommodate the parallel service in the core; and
- Removed the Network Guidelines section from Chapter 4, as these guidelines apply to the region's network as a whole, regardless of the operator and are not under consideration for Board adoption

#### Line Benefit Score (Chapter 6)

- Noted that the Line Benefit Score parameters are currently weighted equally;
- Replaced Census LEHD Origin-Destination Employment Statistics with MWCOC Round 9.1a Cooperative Forecast Totals to better reflect Federal at-place employment data;
- Removed parking from the calculation of commuter population served for the same reason as it was eliminated above; and
- Provided additional information about the evaluation and grading.

### **Evaluating Metrobus Service**

Once adopted, the Service Guidelines will be applied to the previous fiscal year's service, which will enable Metrobus planners to identify and propose service adjustments for the next fiscal year. Proposed service adjustments could include adding, restructuring, or reducing service to improve performance and customers' experience.

Adopting the guidelines does not imply a commitment that every bus line/route meet every guideline nor mandate budgetary action to immediately meet the guidelines. Implementing any proposed adjustments continues to be subject to the Board's deliberation, decision-making process and approval, which considers available funding as part of the annual budget and/or State of Good Operations (SOGO) as well as public outreach and Title VI Equity Analyses, as required.

Each guideline and performance measure will be graded an A through E scale against the target developed for the type and tier of the line. The grades have the following definitions:

- 'A' grades = Exceed the target;
- 'B' grades = Meet the target;
- 'C' grades = Approaches the target;
- 'D' grades = Below the target; and
- 'E' grades = Significantly Below the target.

An overall line grade is also calculated. For the December 2020 analysis, all metrics were weighted equally to calculate the overall line grade. An Annual Line Performance Report was developed to provide more granular data for all guidelines and performance data as well as its Line Benefit Score. Each year, Metro anticipates making these reports available to align with the first presentation of the General Manager's Budget for the upcoming fiscal year.

Combined, the grades and the Line Benefit Score, provided in the Annual Line Performance Report, give the rationale and detail to support and prioritize any proposed service adjustments.

### **Application of the Service Guidelines: Annual Line Performance Report and Evaluating FY2020 Service prior to March 2020 (Pre-COVID service)**

The guidelines and targets were applied to Metrobus service that operated in December 2019 and utilized data from July 2019 through February 2020. This reflects pre-COVID data. Classifying service by type and tier resulted in the following number of lines in each group, which enables service within each group to be compared.

BRT: Total: 1 line  
Tier 1 (1); Tier 2 (0); Tier 3 (0)

Framework: Total: 67 lines  
Tier 1 (33), Tier 2 (22); Tier 3 (12)

Coverage: Total: 48 lines  
Tier 1 (7), Tier 2 (12); Tier 3 (29)

Commuter: Total: 35 lines  
Tier 1 (14), Tier 2 (8); Tier 3 (13)

Once the guidelines and targets were applied to pre-COVID FY2020 Metrobus service, each line/route received a grade on an A through E as explained above. The results are provided in the Annual Line Performance Report attached to this document. Using the grading scale above, the summary of the overall line level grades are as follows:

A (Exceeds): 37  
B (Meets): 91  
C (Approaches): 22  
D (Below): 1  
E (Significantly Below): 0

### **Service Guidelines and Possible Transit Equity Implications**

Adopting and applying Service Guidelines enables both a comparison of like service and a better understanding of the equity of similar service across the region. Surveys conducted during the Bus Transformation Project showed that frequency, span and reliability were selected as barriers to using local bus service by low-income respondents. Future service adjustments and improvements could advance equity by improving service that with low overall grades, by increasing frequency and reliability, and by increasing the span of service.

**Next Steps**

The next steps are to use the results of the Service Guidelines application to identify potential future service adjustments and opportunities for capital investment to prioritize buses on roadways.

**FUNDING IMPACT:**

No funding impact associated with adopting new guidelines.

**TIMELINE:**

<b>Previous Actions</b>	January 2019 – Bus Transformation Project Update July 2019 – Bus Transformation – Draft Strategy December 2019 – Bus Transformation Project Update January 2020 –Bus Transformation Project (Resolution 2020-01) July 2020 – Framework for Transit Equity September 2020 – Draft Metrobus Service Guidelines
<b>Anticipated actions after presentation</b>	n/a

**RECOMMENDATION:**

Staff recommends adoption of the Metrobus Service Guidelines.

**SUBJECT: ADOPTION OF METROBUS SERVICE GUIDELINES**

**2020-43**

**RESOLUTION  
OF THE  
BOARD OF DIRECTORS  
OF THE  
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY**

WHEREAS, Pursuant to Compact § 9(b) and Board Bylaws Article II.1, the Board of Directors is primarily responsible for policy, financial direction, oversight, and WMATA's relationships with its customers, jurisdictional partners, and signatories; and

WHEREAS, Resolution 2020-01 directed staff to update the Metrobus Service Guidelines; and

WHEREAS, Staff updated the Metrobus Service Guidelines to reflect updated metrics and measures, the Transit Equity Framework, and the Bus Transformation Project recommendations; and

WHEREAS, Chapters 2-4 of the attached Metrobus Service Guidelines fall under the Board's responsibilities, and the remainder of the Guidelines are administrative in nature and within the General Manager and Chief Executive Officer's authority;

NOW, THEREFORE, be it

*RESOLVED*, That the Board of Directors adopts Chapter 2 (Service Classifications); Chapter 3 (Service Guidelines and Level of Service Targets); and Chapter 4 (Line/Route Performance Measures) of the Metrobus Service Guidelines; and be it further


*RESOLVED*, That the attached Metrobus Service Guidelines supersede and replace all prior Metrobus service guidelines; and be it finally

**Motioned by Mr. Smedberg, seconded by Ms. Gidigbi**

**Ayes: 8- Mr. Smedberg, Ms. Gidigbi, Mr. Goldman, Mr. Rouse, Mr. Letourneau, Mr. Marootian, Mr. Slater and Mr. McMillin**

*RESOLVED*, That in order to timely use the attached Metrobus Service Guidelines for designing future service plans, this Resolution shall be effective immediately.

Reviewed as to form and legal sufficiency,



Patricia Y. Lee  
Executive Vice President and General Counsel

WMATA File Structure No.:  
6.6.4 Bus Route and Service Planning



# Bus Service Guidelines - Metrobus

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FINAL

December 2020





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## 1. Introduction

The Bus Transformation Project's first recommendation was to provide "frequent and convenient bus service that connects communities and promotes housing affordability, regional equity, and economic growth." This recommendation recognizes the need to establish guidelines across the region's bus systems to provide consistent bus service, tailored by location and time of day across the region, to make all of the services work together. Metro is taking the first step to update its decades-old Metrobus service guidelines as outlined in this document.

The intent of service guidelines is threefold: first, to provide customers with clear expectations of service; second, to give Metro a formal and transparent approach to determine when and where to add, adjust, or remove service; and third, to provide a balance of consistency and flexibility to address various public transportation needs across the region and at different times of day.

**The purpose of this document is to create a guide to equitably and consistently classify Metro's bus service; enable local partners to consider these in their planning processes; give guidance on network, corridor, and line/route design and goals for level of service and service coverage; and inform service performance targets.**

They set the direction for where Metrobus service wants to go as it improves and evolves over time. It also provides the framework to make decisions within the realities of limited resources.

By adopting these guidelines, Metro will:

- Create transparent and formalized approach to routing, service, and budget decisions;
- Develop apples to apples comparison for similar types of service;
- Help ensure equitable service across the region;
- Expand current guidelines to evaluate the customer experience; and
- Align Metro's service guidelines with the industry – both local regional partners and national systems.

If Metro's jurisdictional partners choose to leverage these guidelines, a more regional approach to bus service will be available to customers, allowing:

- Consistent and appealing service across the region as a result of cohesive planning, operations, and performance;
- Greater communication among agencies;
- Increased number of customers who use bus region-wide to access key destinations-regardless of where they live and what times they travel;
- Greater transparency associated with "regional" services-where riders benefit from the clearer distinctions of how services are planned and allocated;
- Meeting riders' growing expectations of transit and travel across the region through forms of bus that are flexible and cost effective; and
- Stronger connections between bus and land use, where people can access employment centers, key goods and services, and amenities and live affordably.

These guidelines have been developed with bus operators and external stakeholders in mind. With analysis informed by these guidelines, operators are also enabled to more rigorously consider proposals for future service that may not meet the established thresholds. Both the general public and public officials alike will gain an understanding of where bus service is viable (since service performance is not unrelated to the surrounding land use and commute patterns) and why service updates/changes may be proposed.

The following key elements will be addressed in the following sections.

- **Service Classifications (Chapter 2)** identify the types of transit services that are suitable throughout the region. This section provides a high-level overview of how and where these services should be operated. Lines serving different areas have different requirements; lines are categorized by “activity tier” based on area characteristics.
- **Service Guidelines (Chapter 3)** outline design guidelines by service classification, focusing on level of service and alignment design. This will provide a basis for ensuring similar services are being operated consistently across the region.
- **Performance Measures and Targets (Chapter 4)** provide guidelines for measuring key criteria at the line/route-level and informs the evaluation process to determine whether a service needs to be re-examined, improved, or considered for discontinuation.
- **Network Guidelines (Chapter 5)** recognizes key metrics for the entire transit network across the WMATA Transit Zone measuring service regardless of operator to ensure equitable distribution of resources.
- **Line Benefit Score (Chapter 6)** provides a rubric on how to assess a line’s value to the bus network.
- **Performance Improvement Plan (Chapter 7)** provides additional analysis to show what is contributing to lower performance scores, makes recommendations on targeted improvements to help raise performance scores, helps to justify service changes, and shows results of a post-implementation review.

In addition to planning, these guidelines will support Title VI monitoring for on-time performance, crowding, availability, and headways; they can also be used to inform annual budget discussions and analyses. External stakeholders can use the guidelines to better understand why service changes may be proposed as well as to advocate for service improvements.

## 2. Service Classifications

The first step in establishing regional guidelines is to classify service types that can be consistently applied to services across the region. This section establishes a shared set of service types that were developed based upon industry best practices and an assessment of regional needs. The five service types proposed are: Bus Rapid Transit (BRT), Framework, Coverage, Commuter, and Gap. This section provides a summary of each service type; specific service guidelines and metrics for each service type follow in **Sections 2.2 and 3.4.1**, respectively.

Because the Washington, D.C. region is made up of diverse land use characteristics and various levels of transit demand that require varying levels of service, routes are also assigned to different Activity Tiers based on the number of people and jobs near route stops.

### 2.1. Service Classifications

#### 2.1.1. Bus Rapid Transit

Bus Rapid Transit (BRT) involves the strategic application of coordinated strategies for design of routes, services, facilities and technology. The components of a BRT system can include dedicated lanes; specially designed and identifiable clean-fuel vehicles; special stations; high-frequency service; simplified route structure; fewer stops than conventional bus routes; off-vehicle fare collection; and, the use of Intelligent Transportation Systems (ITS) to improve bus operating speed and reliability.

BRT Routes are designed to provide riders with enhanced bus service that allows them to reduce travel time and in some cases, are the result of upgrading service and street infrastructure of a Framework Route (see below). BRT routes often travel in dedicated lanes or busways or include various forms of priority treatments for some or all of their service pattern, allowing them to bypass traffic and/or gain an advantage at intersections and as a result faster travel times and more reliably. BRT is best-suited to operate along mixed-use, densely populated corridors. These routes typically have higher frequencies in both peak and off-peak periods compared to typical bus services and create a rail-like service on the roadway. Service tends to operate throughout the day and on weekends to serve a variety of riders and trip types. To help minimize trip time, BRT routes have little circuitry and serve areas with demonstrably high levels of demand.

### 2.1.2. Framework Routes

Framework Routes are the backbone of bus service, allowing riders to travel along major corridors/streets and access the region. Framework Routes and BRT form the equivalent of the rubber-tire rail network.<sup>1</sup><sup>2</sup><sup>3</sup>

Framework Routes tend to have more frequent stops than BRT, providing more access to riders' origins and destinations. Framework Routes have moderate to high frequency, giving riders the added convenience that a bus will show up when needed. Service extends throughout the day, accommodating many trip types including commuting, errands, education, and social purposes. Depending on the circumstances the route may operate less on weekends and/or evenings. Finally, Framework Routes should have little circuitry and should not divert to serve areas with low demand.

A **Premium Route** is a Framework Route that operates a significant portion of the route in a corridor with enhanced customer or operational amenities such as station-like stops, level boarding, bus bulbs, bus lane segments, queue jump signal or transit signal priority; or operates limited-stop service as an overlay to another route. Limited-stop routes should only be operated where both the limited-stop and the underlying local route each have a service frequency of 12 minutes or better. Limited-stop routes may serve the entire length of the underlying local route or may operate a shorter pattern. Limited-stop routes may operate all day or only during peaks, as demand allows, and peak-only limited-stop routes may be peak-direction only.

### 2.1.3. Coverage Routes

Coverage Routes deliver service deeper into neighborhoods or commercial districts, especially areas with poor street network connections. These routes tend to have more stops per mile, lower service frequency, shorter span of service, and can be more circuitous, especially in neighborhoods that contain cul-de-sacs or barriers such as freeways, water, or railways. These routes often provide a level of service for the selected populations or specific destinations who depend on the route, and often connect to other more frequent

These differ from BRT in that they have some bus priority elements, but not a full package of priority elements for a significant portion of the entire route.

**On-demand Service** operates similarly to a Coverage Route in lower density areas, but typically does not have a defined route and people book trips in advance using a smart phone app or telephone.

<sup>1</sup>Direct interjurisdictional connections are defined as routes serves at least four Regional Activity Centers as currently identified by MWCOG, and it must serve Regional Activity Centers in two jurisdictions AND routes with a circuitry measure that is less than 1.75 (travel distance).

<sup>2</sup>Transfer Value to the Network is defined as either the route provides opportunities to connect to at least 45 other bus routes over the course of the route by serving Metrorail stations or transit centers which provide high-volume connections OR route provides connections between at least two different branches of the Metrorail network, effectively creating the "rubber-tire rail" portion of the WMATA network.

<sup>3</sup> Route has average density of more than 25 population + jobs per acre, either today or in 2030, along the route.

routes/modes at a transit hub. Low-density areas may also make sense for Coverage Routes that include on-demand service.

#### 2.1.4. Commuter Routes

Commuter Routes are designed to connect residential areas or park and rides to areas of high employment density during peak periods. These routes are designed to have one or more pickup locations in close proximity to each other, before running non-stop, often via a highway, to one or more destinations. In some cases, they can provide a direct trip (one-seat ride) during high-ridership periods that can otherwise be made with a transfer in other time periods. Stop spacing may vary widely on Commuter Routes, but will typically have stop spacing typical of coverage routes in residential areas and an express segment or limited stop portion connecting those residential areas to high density corridors or major activity centers. Commuter Routes may operate in the peak direction only.

**Airport Express Routes** are a variant of the Commuter route, running between areas of transit demand, whether a dense area, a transit hub, or a park and ride, to an airport. Many characteristics are the same as Commuter Routes, though service is generally provided more frequently, and for longer spans of service, as people travel at various times, and airport employees work on all shifts.

#### 2.1.5. Gap Service Routes

Gap service is run for a specific purpose, such as serving a school or other destination with focused demand, replacing rail service overnight, providing shuttle service only during the hours of a major tourist attraction, meeting weekend-only needs, or other purposes that do not align with the more general service types. These routes should be designed to fit the needs of the situation and are not governed by standardized guidelines.



## 2.2. Activity Tiers

Outside of the general service classifications, every route will be assigned to an activity tier. Throughout the Washington, DC region there are diverse land use characteristics and various levels of transit demand, and transit serving these areas requires the appropriate level of service and design elements to serve these areas effectively.

Therefore, the following service guidelines have been tailored to three activity tiers. Service has been categorized into three activity tiers: Tier 1 (the densest) to Tier 3 (the least dense). Lines/routes that serve more dense activity, whether that is residential population or job density, are grouped together and compared against each other, and vice versa for routes that serve less dense areas. Lines will move between tiers on any given year due to service changes or changes in development along a line.

### ■ Tier 1

- Over 50 percent of bus stops along a route have population plus employment of 25 or more per acre

### ■ Tier 2

- Between 15 percent and 50 percent of bus stops along a route have population plus employment of 25 or more per acre

### ■ Tier 3

- Less than 15 percent of bus stops along a route have population plus employment of 25 or more per acre

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### 3. Service Guidelines and Level of Service Targets

This section details service guidelines and level of service targets by service classification and tier. It focuses on ways to enhance connections; reduce duplication between lines/routes; equitably serve transit demand; improve service efficiency; and leverage the improvements in bus running ways that are happening throughout the region. The purpose of having guidelines – which differ depending on the type of density and land use throughout the region – is to create consistency between offerings in different parts of the region so that customers experience a more consistent and cohesive service regardless of where they are in the region.

These guidelines build on existing service guidelines currently in place, but have been enhanced to allow for services that will create the best customer experience and meet expected demand. Guidelines vary based on service type, geography, and in some cases, time of day or day of the week. The Guidelines apply to the BRT, Framework, Coverage, and Commuter service types.

For the sub-classifications such as Premium, On-Demand and Airport Express, unless stated otherwise the minimum service guidelines and target performance metrics of the overall service classification apply. For example, as Airport Express routes are a variation of Commuter routes, they do not have their own set of guidelines, but instead follow the guidelines for Commuter routes.

### 3.1. Span of Service

The span of service establishes when transit service will begin and end each weekday, Saturday, and Sunday. When determining the span of service for specific lines/routes, a transit agency must consider the tradeoff between a longer span of service, which allows a route to capture more riders with different trip purposes across various periods throughout the day, and efficiently allocating resources to the most productive time periods. It is important that spans of service for different routes and services be coordinated to ensure that the transit network will meet the needs of riders throughout the service day.

**How to Calculate:** Calculated from the first stop of the first trip to the last stop of the last trip.

**Table 1 | Minimum Span of Service**

Zone	BRT	Framework	Coverage	Commuter
Weekday				
Tier 1	5:30 a.m.— Midnight	6:00 a.m.— Midnight	6:00 a.m.— 9:00 p.m.	Minimum of one trip that arrives by 7:00 a.m., and one trip that leaves at or after 6:30 p.m.
Tier 2	5:30 a.m.— 10:00 p.m.	6:00 a.m.— 10:00 p.m.	6:00 a.m.— 8:00 p.m.	
Tier 3	5:30 a.m.— 10:00 p.m.	6:00 a.m.— 10:00 p.m.	6:00 a.m.— 8:00 p.m.	
Saturday				
Tier 1	6:00 a.m.— Midnight	7:00 a.m.— Midnight	7:00 a.m.— 9:00 p.m.	-
Tier 2	6:00 a.m.— 9:00 p.m.	8:00 a.m.— 9:00 p.m.	8:00 a.m.— 8:00 p.m.	
Tier 3	6:00 a.m.— 9:00 p.m.	8:00 a.m.— 9:00 p.m.	8:00 a.m.— 8:00 p.m.	
Sunday				
Tier 1	6:00 a.m.— 10:00 p.m.	7:00 a.m.— Midnight	7:00 a.m.— 9:00 p.m.	-
Tier 2	6:30 a.m.— 9:00 p.m.	8:00 a.m.— 9:00 p.m.	8:00 a.m.— 8:00 p.m.	
Tier 3	6:30 a.m.— 9:00 p.m.	8:00 a.m.— 9:00 p.m.	8:00 a.m.— 8:00 p.m.	

### 3.2. Service Headway

Service headway is the amount of time scheduled between bus arrivals. Much like with span of service, transit agencies must consider that while low headways reduce the time customers must wait for a route to arrive and shortens their travel time, they also increase costs by requiring more buses and operators for the line/route. They must also consider that these periods of time will occur multiple times for customers who transfer to other routes to complete their trip.

**How to Calculate:** The mode of the time between trips at the control timepoint on a line/route during the relevant time period.

**Table 2 | Maximum Service Headway (Minutes)**

Zone	BRT		Framework			Coverage		Commuter
	Peak	Off-peak	Peak	Off-Peak	Premium	Peak	Off-peak	
Weekday								
Tier 1	10	15	15	15	12	30	60	Varies based upon demand
Tier 2	15	20	20	20	15	30	60	
Tier 3	30	30	30	60	30	60	60	
Saturday								
Tier 1	15	15	20	20	15	60	60	-
Tier 2	20	20	30	30	20	60	60	
Tier 3	30	30	60	60	30	60	60	
Sunday								
Tier 1	15	15	20	20	15	60	60	-
Tier 2	20	20	30	30	20	60	60	
Tier 3	30	30	60	60	30	60	60	

### 3.3. Stop Frequency

Stop frequency refers to the average number of bus stops per-mile on a route. Establishing stop frequency requires transit agencies to evaluate the trade-offs between customers' stop proximity and overall travel speeds and time. Locating bus stops closer together allows potential riders to access bus service more easily, since their origin or destination may be close to a stop. However, closely-placed bus stops increase travel time by requiring the bus to make more stops. As the distance between stops increases, travel time on board the bus typically decreases, but it requires a longer distance to access the service for many riders.

**How to Calculate:** Divide the total number of bus stops along a route by the round-trip route length for each segment of the route (between each timepoint pair.)

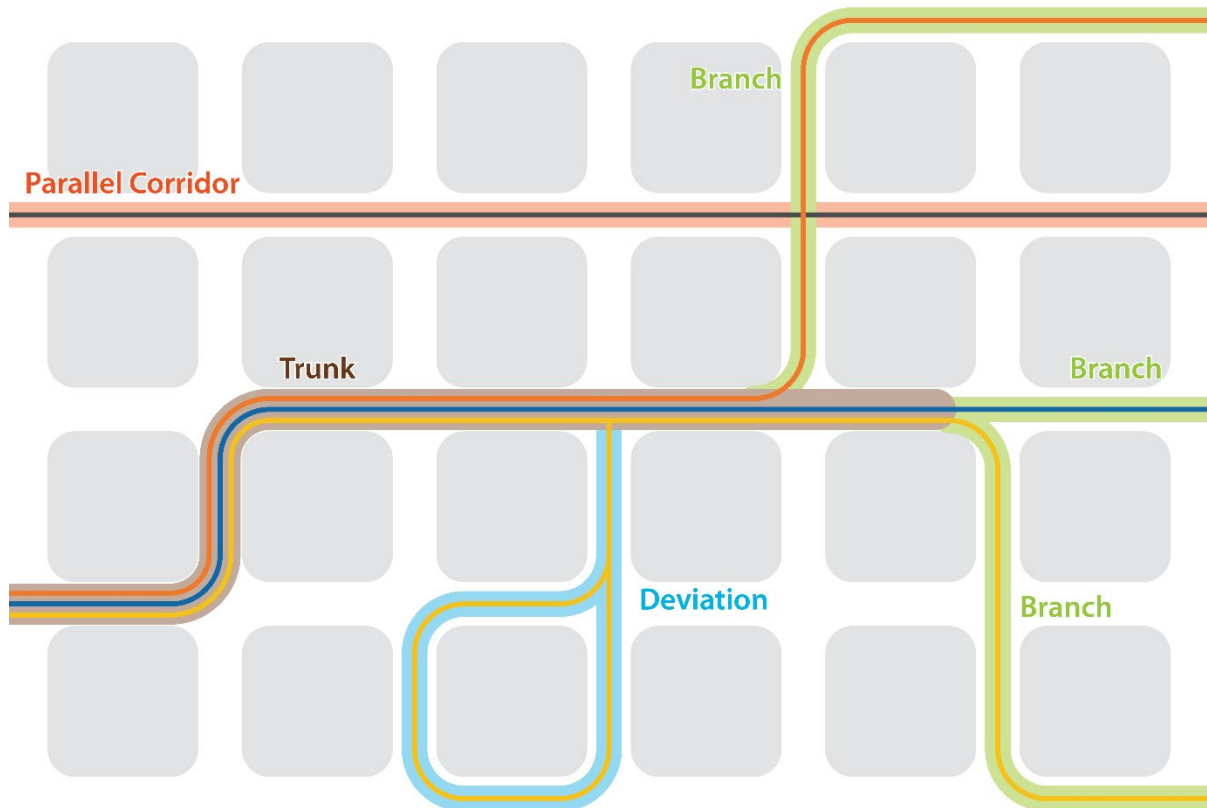
**Table 3 | Average Stop Frequency (per Mile)**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	2–3	4–5	4–5	-
<i>Tier 2</i>	1–3	4–5	4–5	-
<i>Tier 3</i>	1–3	4–5	4–5	-

### 3.4. Route Design

Routes can interact and influence each other in many ways: multiple routes (or branches) can join together on the same stretch of road; a route or a variant of a route can have a deviation that leaves the main route alignment; or two routes may run a short distance apart as parallel routes. Figure 1 illustrates various types of route design that can be operated along a route.

**Figure 1 | Route Patterns**



#### 3.4.1. Deviations

When a route deviates from the main corridor in which it is operating to serve a specific area or point, it is considered a deviation. Deviations increase the travel time of a route but are often included because of specific demand generators. Deviations should be evaluated based on how much travel time they add to the route or how productive they are compared to the rest of the route.

**How to Calculate:** To calculate the percent of travel time, divide the one-way trip travel time with the total travel time for the deviation. To calculate the time per passenger, divide the total time added by the segment by the number of passengers boarding the segment.

**Table 4 | Deviation Guidelines**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	No more than 5% of travel time	No more than 15% of the in-vehicle travel time	No more than 25% of the in-vehicle travel time	No more than 10% of in-vehicle travel time
		No more than three minutes per passenger	No more than three minutes per passenger	No more than two minutes per passenger
<i>Tier 2</i>	No more than 10% of travel time	No more than 20% of the travel time	No more than 25% of the travel time	No more than 15% of travel time
		No more than three minutes per passenger	No more than three minutes per passenger	No more than three minutes per passenger
<i>Tier 3</i>	No more than 10% of travel time	No more than 25% of the travel time	No more than 25% of the travel time	No more than 20% of travel time
		No more than three minutes per passenger	No more than three minutes per passenger	No more than three minutes per passenger

### 3.4.2. Patterns / Line Groups

**Patterns:** There are certain areas in the WMATA Transit Zone where a route may have multiple patterns that share the same common primary alignment (trunk), but branch off at the ends of the route to serve various destination or origin points. The combined frequency and span of all the patterns along the trunk should be considered together when evaluating whether the service meets the service guidelines.

**Routes and Lines:** WMATA historically has named patterns as routes, combining a package of route patterns into a line to support ease of scheduling and to some extent, ease of service legibility for customers whose trip is within a primary corridor.

**Defining Patterns, Routes and Lines:** As part of the service guidelines, lines are defined as a group of complementary routes serving the same trunk. One route or pattern providing a significant number of trips on the line shall be considered the core route pattern. All other route patterns shall operate at least 60% of their route miles on shared segments with the core route pattern to be considered part of that line group. Exceptions can be made for extensions of routes/lines needed to serve the system at times of the day/night while Metrorail is not operating. Routes that do not meet this criterion should be considered separate lines.



While multiple patterns can help create higher effective frequencies on trunks, they can also lead to operational issues such as bus bunching or on-time performance issues due to delays on certain branches. Multiple patterns also increase confusion and legibility of the system for customers. Routes that have lower productivity on branches should be considered for conversion to feeder routes that will operate from the original destination to the trunk of the route and allow riders to transfer to higher-performing routes or into the main pattern.

**How to Calculate:** Divide the number of boardings on the unique segments of a line, or unique branches of the route, by the total number of boardings on that route.

**Table 5 | Minimum Branch Productivity**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	20% of passenger volume	15% of passenger volume	10% of passenger volume	10% of passenger volume
<i>Tier 2</i>	20% of passenger volume	10% of passenger volume	10% of passenger volume	10% of passenger volume
<i>Tier 3</i>	15% of passenger volume	10% of passenger volume	10% of passenger volume	10% of passenger volume

### 3.4.3. Parallel Corridors

When two bus lines run on nearby parallel corridors for significant distances, it can create duplicative service. This prevents transit agencies from operating the most cost-efficient and effective transit network, since two routes are effectively providing the same service and competing for passengers. In situations where parallel corridors all meet or exceed level of service and productivity guidelines, operating in parallel corridors is justified. The intent of this measure is to prevent parallel services not meeting minimum service levels of productivity targets. The table below shows the minimum distance between corridors that operate routes of each service type.

**How to Calculate:** Measure the distance between parallel corridors; parallel sections should be at least one mile long.

**Table 6 | Minimum Distance Between Parallel Corridors**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	0.5 mile	0.5 mile	0.5 miles	0.5 mile
<i>Tier 2</i>	1 mile	0.5 mile	1 mile	1 mile
<i>Tier 3</i>	1 mile	1 mile	1 mile	2-5 miles

### 3.4.4. Circuity

Circuity refers to how much diversion there is in a route, and is calculated by comparing the distance the bus travels on its route to the most direct path. Lower circuity means a more direct route for passengers on the route. Limited-access roads such as interstates should not be used in the calculation unless the route travels on them. Lower circuity means a more direct route for passengers on the route.

**How to Calculate:** Using a GIS program, find the most direct, non-limited access path to connect the origin and destination of the bus route and compare to the distance of the bus route. If a route does not use limited-access highways, the comparison evaluation should not use them either. Divide the first number by the second to find circuity.

**Table 7 | Maximum Circuity**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	1.75	1.75	-	-
<i>Tier 2</i>	1.75	1.75	-	-
<i>Tier 3</i>	1.75	1.75	-	-

## 3.5. Vehicle Size

Vehicle size should be based on a number of factors:

- Service type: commuter vehicles should have high back seats, on-demand services should consider vans/sedans;
- Street geometry: where vehicle size is limited by the turning movements of the vehicles; shorter (30-foot) vehicles may be needed on neighborhood streets;
- Articulated buses are appropriate on high frequency routes that have very high ridership (lines/routes that run at least every 10 minutes during peak periods and every 15 minutes during off-peak periods). Either two-door or three-door articulated buses may be used, depending upon the future procurement needs as defined by the agency; and
- All other services should operate with standard-sized (40-foot) buses.

## 4. Line/Route Performance Measures and Targets

The following section details Line/Route Performance measures that are applicable at the line/route level. The Line/Route Performance measures establish productivity, reliability and cost effectiveness targets defined by service types and zones to allow for a normalized route comparison regardless of provider.

### 4.1. Line/Route Performance Measures

Performance in this section is measured at the line/route-level and by service type and tier. Comparisons should be made within the type and tier. The purpose of this section is to identify deficiencies in performance that can be addressed at the line/route level.

#### 4.1.1. Productivity

##### *Passengers per Revenue Hour / Trip*

Passengers per revenue hour helps compare productivity across lines/routes. In some instances, lines/routes with higher ridership may have longer spans of service or provide more trips throughout the day. Examining the number of riders per revenue hour normalizes line/route performance to allow for comparison between multiple lines/routes with different spans of service, frequencies, or travel times.

**How to Calculate:** Divide average daily unlinked passenger trips by revenue hours (total time between the first and the last stop of the day). Average is taken from lines/routes within the same service type and zone.

**Table 8 | Minimum Passengers per Revenue Hour Target**

Zone	BRT	Framework	Coverage
<i>Tier 1</i>	35	30	20
<i>Tier 2</i>	25	20	15
<i>Tier 3</i>	20	15	10

##### *Passengers per Trip*

Passengers per trip compares productivity across services that provide long-haul trips that generally carry more passengers across longer distances, with longer stretches of the line/route not allowing passengers to board or alight.

**How to Calculate:** Divide average daily unlinked passenger trips by daily number of one-way trips. Average is taken from lines/routes within the same service type and zone.

**Table 9 | Minimum Passengers per Trip Target**

Zone	Commuter
<i>Tier 1</i>	20
<i>Tier 2</i>	15
<i>Tier 3</i>	10

***Passengers per Revenue Mile***

The passengers per revenue mile metric allows agencies to evaluate the productivity of lines/routes with different route lengths. It can also be helpful when comparing lines/routes that operate in areas with higher levels of congestion to those that do not, since the time each route spends in traffic is not factored into the passengers per revenue mile. This performance measure may not effectively represent longer, limited stop routes that are often longer distance routes.

**How to Calculate:** Average daily unlinked passenger trips divided by revenue miles (total miles between the first and the last stop of the day). Average is taken from lines/routes within the same service type and zone.

**Table 10 | Minimum Passengers per Revenue Mile Target**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	5.0	4.0	4.0	1.5
<i>Tier 2</i>	2.0	2.0	2.0	1.0
<i>Tier 3</i>	2.0	1.0	1.0	1.0

***Unique Segment Ridership***

Unique segment ridership is a measure of the percentage of ridership that occurs on unique segment of a route that is not served by another route. The table below shows the recommended percentage of unique segment ridership for each service classification.

**How to Calculate:** Total boardings on unique segment divided by the total boardings on the route.

**Table 11 | Minimum Percent of Unique Ridership Target**

Zone	BRT	Framework	Coverage	Commuter
<i>Tier 1</i>	25%	10%	10%	15%
<i>Tier 2</i>	25%	10%	10%	15%
<i>Tier 3</i>	20%	10%	10%	15%

## 4.1.2. Reliability

### *On-Time Performance*

On-time performance is an indicator of the reliability of a line/route and affects customer satisfaction. It illustrates how closely delivered service adheres to published schedule, measured as schedule-based or headway-based depending on the scheduled service headway.

For schedule-based service, it refers to the percentage of trips that depart a certain timepoint relative to their scheduled departure time. A schedule-based performance measure involves defining “on-time” based on a window that usually defines when a trip is too early or late relative to its scheduled departure.

For headway-based service, it refers to the percentage of trips that depart a certain timepoint relative to the scheduled service headway. A headway-based performance measure involves defining “on-time” based on a buffer that usually defines when a trip is late relative to the scheduled service headway.

**How to Calculate:** Percent of timepoints delivered on-time. All timepoints should be examined, not just the beginning or end of the route.

Schedule-based service is measured as the percent of timepoint pull-outs that are between two minutes early and seven minutes late. The last timepoint of the route is considered on-time if the bus arrives no greater than seven minutes late.

Headway-based service is measured as the percent of timepoint pull-outs that are no greater than the scheduled service headway plus three-minutes after the pull-out time of the bus ahead.

**Minimum On-Time Performance Target:** Target is 79 percent for FY2020. Metro’s Office of Transit Performance Management reviews and revises this target annually considering relevant goals, objectives, staffing and funding constraints while striving for continuous improvement.

### *Customer Trip Time*

Customer trip time is an indicator of how well service meets the schedule and customers reach their destination on-time. It illustrates how closely service adheres to the published schedule, measured as the percentage of customers who complete their trip within 5-minutes of the scheduled time.

**How to Calculate:** Divide the number of customer trips completed on-time by total customer trips. A customer trip is considered on-time if excess wait time plus additional travel time is less than or equal to 5-minutes.

Excess wait time is measured as the actual wait time (actual headway divided by 2) minus the scheduled wait time (scheduled headway divided by 2) for BRT and Framework Routes and as actual arrival time minus scheduled arrival time for all other services.

Additional travel time is measured as the end-to-end travel time that exceeds the schedule.

**Minimum Customer Trip Time Target:** Once this measure is established, it will be launched as a pilot measure. After one year of baseline data is collected, Metro’s Office of Transit Performance Management will review performance and establish an annual target. This target will be reviewed and

recalibrated annually considering relevant goals, objectives, staffing and funding constraints while striving for continuous improvement.

### *Crowding*

Crowding evaluates which lines/routes may not be safely and/or comfortably transporting riders due to overcrowding by evaluating the percentage of passenger time spent on vehicles that exceed crowding guidelines. The target vehicle load often varies based on trip frequency and between the peak and off-peak periods: higher transit demand deserves more service, but riders may be more likely to tolerate standing, especially if their trip distances are relatively short.

Generally, headways of more than 20 minutes should have maximum load of 100% of seated capacity, while service with shorter headways can allow 120% of seated capacity. This is reflected in general in **Table 12**, though lines/routes should be evaluated individually. For example, Tier B Framework Routes have a maximum headway of 30 minutes (**Table 2**), and such a line/route would have a target maximum vehicle load factor of 100% of seated capacity; if a particular line/route, however, had headways of 15 minutes during the peak period, it would have a target maximum vehicle load of 120% of seated capacity.

**How to Calculate:** Divide the number of crowded passenger minutes by the total number of passenger minutes.

**Maximum Crowding Target:** Current target is 5 percent. Metro's Office of Transit Performance Management reviews and recalibrates this target annually considering relevant goals, objectives, staffing and funding constraints while striving for continuous improvement.

### *Vehicle Load Factor*

The vehicle load factor evaluates which lines/routes may not be safely and/or comfortably transporting riders due to overcrowding. The target vehicle load factor often varies based on trip frequency and between the peak and off-peak periods: higher transit demand deserves more service, but riders are more likely to tolerate standing. Generally, headways of more than 20 minutes should have maximum load factor of 1.00, while frequencies below this can allow 1.20. For example, Tier B Framework routes have a maximum headway of 30 minutes (**Table 2**), and such a line/route would have a target maximum vehicle load factor of 1.00; if a particular route, however, had headways of 15 minutes during the peak period, it would have a target maximum vehicle load factor of 1.20. **Table 12** shows targets for individual trips, averages for an entire line/route or time period will most often show lower numbers unless all trips are exceeding maximum capacity. It is likely that some trips on a line/route will exceed maximum capacity when the average for the time period exceeds 0.80.

**How to Calculate:** Divide the average maximum number of passengers that a trip is carrying by the total seated passenger capacity of the vehicle that is making the trip.

**Table 12 | Maximum Capacity/Load Target by trip**

Zone	Time Period	BRT	Framework	Coverage	Commuter
Tier 1	Peak	1.20	1.20	1.20	1.00
	Off-peak	1.00	1.00	1.00	
Tier 2		1.00	1.00	1.00	1.00
Tier 3		1.00	1.00	1.00	1.00

### 4.1.3. Cost Effectiveness

#### *Operating Cost per Passenger Trip*

Operating cost per passenger trip helps agencies compare the amount of funding needed to operate a certain line/route to the use of the service. Lines/Routes with more frequent service have higher operating costs, since they require more buses and operators, but can have a lower operating cost per passenger trip due to their relatively high number of riders. In subsequent years, operating cost per passenger trip targets will increase at the same percentage rate as the increase in the Board-approved operating cost per platform hour for bus services.

**How to Calculate:** Divide total operating cost for the line/route by the number of passenger trips on the route. Average is taken from lines/routes within the same service type and zone.

**Table 13 | Maximum Operating Cost per Passenger Trip Target (FY21)**

Zone	BRT	Framework	Coverage	Commuter
Tier 1	\$3.50	\$5.00	\$5.00	\$7.00
Tier 2	\$4.50	\$5.00	\$5.00	\$7.00
Tier 3	\$4.50	\$7.00	\$7.00	\$7.00

#### *Cost Recovery*

Cost Recovery measures the portion of operating expenses that is covered by passenger fares. Lines/Routes with low cost recovery ratios may have low ridership or operating costs that are too high to support the current ridership levels in a cost-effective manner.

**How to Calculate:** Divide passenger fares by operating costs.

**Table 14 | Minimum Cost Recovery Target**

Zone	BRT	Framework	Coverage	Commuter
Tier 1	30%	25%	25%	25%
Tier 2	20%	20%	20%	20%
Tier 3	20%	20%	20%	20%



## 4.2. Additional Evaluations

Transit providers regularly evaluate additional data beyond the metrics provided in the previous sections. Evaluating routes for not only ridership but also transfer opportunities and origin-destination movement along a route can highlight potential areas of improvement. Assessing ridership on road segments across multiple routes can provide a clearer picture of corridors where transit utilization is high. While further operational analyses can highlight areas where service can be more efficient and reliable, the following sections introduce additional analyses that can be conducted at both a route and network level to assist in the development of transit services throughout the Washington, DC region.

### 4.2.1. Service Analyses

After utilizing the above metrics in Chapters 3 and 4 above, Metro may choose to pursue additional enhancements to provide a deeper understanding of what is occurring along a route that makes it successful or hinders its productivity. The following is a list of potential enhancements for consideration and support of Metro's commitment to a culture of continuous improvement for Metrobus.

#### *Travel Analyses*

##### *Ridership by Road Segment*

This metric looks at the total number of people riding buses on a road segment, regardless of route. This can be a useful statistic in evaluating potential for bus priority measures along the roadway and at intersections.

##### *Origin-Destination Matrix*

Systemwide origins and destinations show where there is demand within the current system and help transit providers on a planning level. This is useful in understanding how passengers are moving along a line/route, as well as throughout the system and region, and can be used to design more direct connections.

##### *Top Transfer Locations/Services*

Riders often have to spend time at transfer locations; therefore, these are locations to consider focusing on for customer comfort and wayfinding infrastructure and services. This metric also identifies areas that should be evaluated for capacity as new services are added/adjusted.

#### *Operational Analyses*

##### *Revenue versus Non-Revenue Hours/Miles*

Revenue versus non-revenue hours/miles is a comparison of the total hours/miles operated in revenue (or in service) to the total number of non-revenue hours/miles (travel between the garage and start/end of the route). The intent of this metric is to understand how efficiently service is being operated, in particular regarding garage assignment, run cutting, and route design. This analysis can be conducted at both the network and route level.

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### ***Passenger Miles per Revenue Mile***

Whereas peak load shows the maximum number of people on a bus, passenger miles per revenue mile show how the route performs overall in terms of usage. For example, are passengers using the route for short trips or longer trips.

### ***Operating Cost per Passenger Mile***

Total operating costs for the route divided by the number of passenger miles on the route. This metric evaluates how productively a route is operating based upon how it is being used (i.e., for shorter trips or for longer trips).

### ***Service Delivery***

Unfortunately, not every scheduled trip occurs. Whether this is because of a driver scheduling error, driver absence, or bus malfunction, trips can be cancelled, which makes service more unpredictable and the bus a less attractive option to riders. This statistic shows the ratio of daily trips delivered and daily trips scheduled.

## 5. Network Guidelines

As Metrobus is not the only bus provider in the region, it is important to identify systemwide and operator neutral performance measures for the entirety of the network. These include possible targets for availability, comfort and safety, and passenger amenities across the WMATA Transit Zone. The purpose of these metrics is to evaluate the network as a whole, rather than focusing on specific lines/routes or operators. As such, they are not evaluated for Metrobus, but are included in the event that data sharing across operators or a bus network redesign is realized in the years ahead.

### 5.1. Availability Guidelines

Availability in this context refers to the ability for residents, workers, and visitors to access transit with varying levels of service regardless of operator. One important aspect of access is availability of higher frequency services in locations with higher activity densities (population plus jobs per acre). Certainly, serving areas with high concentrations of low income and/or high minority populations is an important priority. Transit providers may also consider how much of their resources should go to high ridership routes as opposed to routes that may not have as many riders but cover a larger service area. This section will lay out network-wide targets for availability. For the purposes of these analyses and based on industry evidence, one quarter mile is the maximum acceptable distance a passenger will travel to access to a local or coverage route, while one half mile is the assumed distance a passenger will travel to access a higher frequency routes, such as a BRT Route, Priority Corridor, or Metrorail.

#### *Service Availability: Frequent Service*

High-frequency transit service, equivalent to the BRT/Framework Routes service classifications, should be provided to at least 80 percent of dense census blocks (jobs<sup>4</sup> + people<sup>5</sup> of at least 25 per acre) within the WMATA Transit Zone on both weekdays and weekends.

**How to Calculate:** Identify census blocks with at least 25 jobs + people per acre (**Figure 2**). Assess the percentage of these census blocks within a half mile of a BRT/Framework Route bus stop or a Metrorail station.

#### *Service Availability: Base Coverage*

Combined, transit providers in the WMATA Transit Zone should serve 90 percent of census blocks with three or more households per acre and/or four or more jobs per acre.

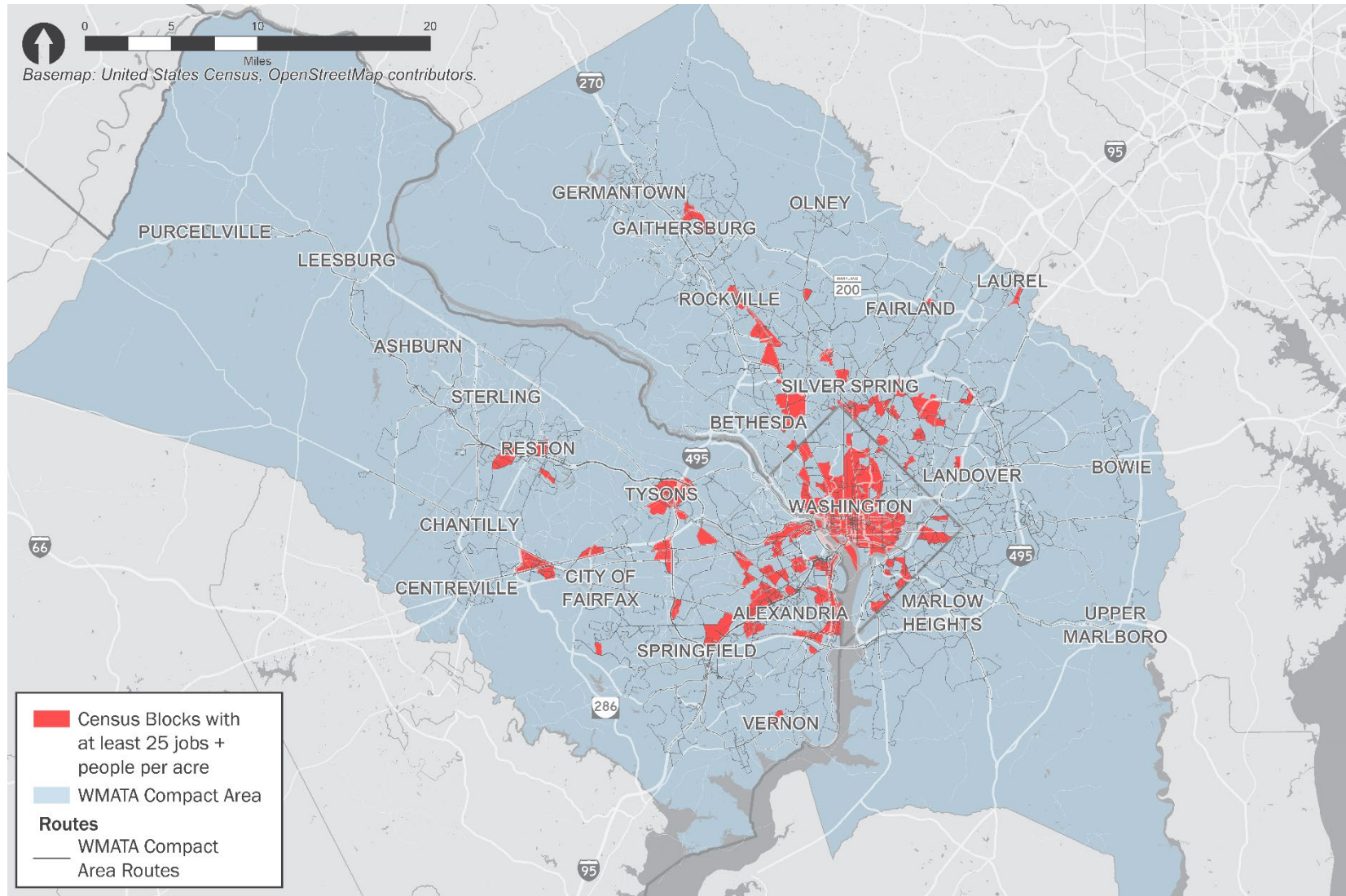
**How to Calculate:** Identify census blocks with three or more households per acre and/or four or more jobs per acre. Assess the percentage of these census blocks within one quarter mile from a bus stop, rail station or access point to public transportation.

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<sup>4</sup> Calculate using Metropolitan Washington Council of Governments (MWCOG) Round 9.1a Cooperative Forecast Totals Data

<sup>5</sup> Calculate using Metropolitan Washington Council of Governments (MWCOG) Round 9.1a Cooperative Forecast Totals Data

**Figure 2 | Census Blocks With at Least 25 Jobs + People per Acre**



Data source: (U.S. Census Bureau, 2017) (U.S. Census Bureau, 2015)

### *Equity Emphasis Areas Availability*

The Metropolitan Washington Council of Governments developed Equity Emphasis Areas (**Figure 3**) to identify small geographic areas that have significant concentrations of low-income, minority populations, or both.<sup>6</sup> Combined, transit providers in the WMATA Transit Zone should provide some level of transit service within one quarter mile of 95 percent of the Equity Emphasis Areas.

**How to Calculate:** Assess the percentage of Equity Emphasis Area census blocks within one quarter mile from a bus stop, rail station or access point to public transportation.

### *Funding Allocation Goal*

Transit providers should also consider how much funding resources should go to higher levels of service routes that are more focused on corridor services (such as BRT), as opposed to routes that may have lower levels of service but cover a large area (other route types). Because different transit providers serve areas with different densities, this guideline differs by geography. This metric should be used as a goal and should not limit the ultimate design of a network utilizing the service guidelines detailed above.

**How to Calculate:** Operating funds for BRT and Framework Routes divided by total operating funds for fixed-route bus service.

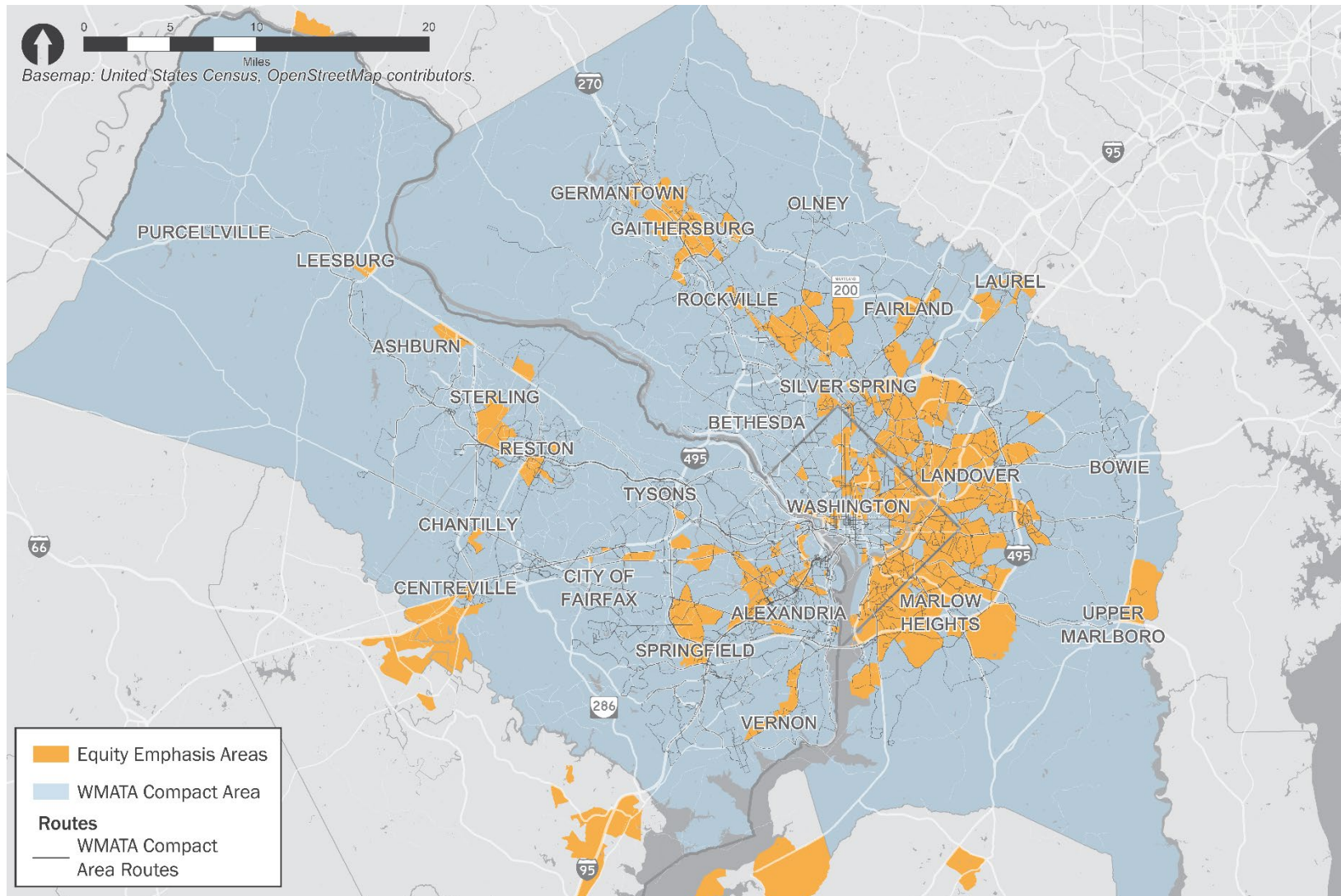
**Table 15 | Funding Breakdown Goal**

Zone	BRT/Framework Routes	Other Bus Routes
<i>Tier 1</i>	85%	15%
<i>Tier 2</i>	80%	20%
<i>Tier 3</i>	75%	25%

<sup>6</sup> As defined in Visualize 2045 (Metropolitan Washington Council of Governments, 2018)



**Figure 3 | Equity Emphasis Areas**



Data source: MWCOG Open Data (Metropolitan Washington Council of Governments, 2018)

## 5.2. Safety Guidelines

### *National Transit Database (NTD) Reportable Bus Collisions*

Measuring the number of serious crashes helps transit agencies identify streets, intersections, or routes that are dangerous and may need to be redesigned; it may also identify operators that require additional training.

**How to Calculate:** Track the total number of NTD reportable collisions. NTD reportable collisions are a subset of the Bus Collision Rate and is based on National Transit Database (NTD) reporting criteria. It reflects bus collisions that result in injuries requiring transport for any involved vehicle or pedestrian, towaway of any involved vehicle, or total damages that cost \$25,000 or more

**Target NTD Reportable Bus Collisions:** *Zero*

### *Bus Collisions*

Measuring the number of crashes by preventability rating helps transit agencies identify streets, intersections, or routes that are dangerous and may need to be redesigned; it may also identify operators who require additional training.

**How to Calculate:** Track the total number of collisions by preventability rating. Collisions includes all incidents where the transit vehicle comes in contact with another vehicle, object or person, regardless of fault.

**Target Bus Collisions:** *Zero*

### *Bus Customer Injuries*

The number of passenger incidents help identify which lines/routes are not providing high-quality service for riders or are unsafe for both passengers and operators. This performance measure covers all incidents for which an incident report was filed and includes injuries for bus passengers. Because the number of incidents is just as important regardless of the type of route, the passenger incident target is the same regardless of route type.

**How to Calculate:** Divide the total number of customer injuries each month by the total number of riders and multiply that number by 10,000.

**Maximum Allowable Passenger Incidents:** *20 per 10,000 riders*

### *Customer Complaints*

Evaluating the number of validated customer complaints can help transit agencies determine what routes are not providing a sufficient quality of service to riders. To best evaluate all lines/routes, the number of validated complaints should be compared to a standard number of riders, so that lines/routes with more riders are not penalized. Additionally, response time to customer complaints should occur in a timely manner.

**How to Calculate:** For total complaints, divide the total number of validated complaints received each month by the total system ridership. For response time, subtract the complaint received date by



the response date for every complaint within a month. The average response time should be less than three days.

**Table 16 | Customer Complaint Metrics**

Measure	Metric
<i>Total complaints</i>	Less than 0.95 validated complaints per 10,000 riders
<i>Response time</i>	Respond to customer complaints within 24 hours Address customer complaints within three business days

### 5.3. Facility Guidelines

#### *Passenger Amenities*

The WMATA Transit Zone has nearly 14,000 bus stops with various levels and quality of passenger amenities. Metro does not own the majority these facilities as they are owned by the jurisdictions and states that operate and maintain roads and sidewalks. Additionally, there are multiple maintenance contracts across the jurisdictions. To create a uniform experience among bus stops in the area, every bus stop should provide a few key passenger amenities. Bus stops with higher ridership merit additional amenities as shown in the enhanced stop type below. Agencies in the WMATA Transit Zone are encouraged to define their bus stops as basic, enhanced, or transit center.

**How to Calculate:** Inventory the amenities at all WMATA Transit Zone bus stops.

**Table 17 | Passenger Amenities Metrics**

Stop type	Metric	Amenities
<i>Basic stop</i>	<50 daily passengers	<ul style="list-style-type: none"> <li>■ Bus stop sign</li> <li>■ ADA 5'x8' landing pad</li> <li>■ Sidewalk (accessible pathway)</li> <li>■ Bus stop ID number tactile plaque</li> <li>■ Lighting during evening service hours</li> </ul>
<i>Enhanced stop</i>	≥50 daily passengers, but not located at a Metrorail station or bus transfer center served by ≥5 bus routes	All amenities listed in the basic stop type, plus: <ul style="list-style-type: none"> <li>■ Expanded boarding &amp; alighting area (rear-door access)</li> <li>■ Shelter</li> <li>■ Seating</li> <li>■ Trash receptacle</li> <li>■ Information case</li> <li>■ System map</li> <li>■ Real-time information</li> </ul>
<i>Transit center</i>	Located at a Metrorail station or a bus transfer center served by ≥5 bus routes	All amenities listed in the enhanced stop types, plus: <ul style="list-style-type: none"> <li>■ Bus Bays</li> <li>■ Multiple shelters as needed</li> </ul>

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## Priority Treatments

There are four types of bus priority treatments that should be considered on a case-by-case basis.

- ***Movement priority:*** Improves the travel of transit vehicles on congested roadways by using exclusive bus lanes which are applied where bus volumes exceed 20 per hour (about 1,000 passengers per hour), bus-only streets, and bus use of freeway Bus-on-Shoulder, HOV, or HOT lanes
- ***Bypass priority:*** Allows buses to bypass a specific, localized congestion point through queue-jump lanes at intersections, shoulder use by buses, and bus bypass lanes on freeway entrance ramps.
- ***Exemptions and special handling:*** Exempts transit vehicles from specific traffic regulations in order to provide more efficient service. These could include turning privileges where the movement is prohibited to other vehicles, mandatory turn lane exemption so the transit vehicle may proceed straight, and priority merge requiring other vehicles to yield to buses pulling away from bus stops.
- ***Signal system priority:*** Gives transit vehicles priority at signalized intersections. Passive priority systems take transit operations into account when designing fixed-time signal plans while active priority plans extend the green phase or terminate the red phase of a traffic signal as needed to improve transit operations. Responsive mode systems prioritize all transit vehicles while intelligent mode systems only prioritize those that are behind schedule.

## 6. Line Benefit Score

Complementing the application of service guidelines, it is often valuable to examine individual lines/routes in context of their relative contribution to the overall network, as not all lines/routes serve the same purpose. This allows Metro to manage its bus network as a portfolio and understand how individual line/route decisions may be related to the overall network's value to the region's residents.

The section below provides a method for comparing Lines/Routes with the above context in mind and should be used as a companion evaluation annually. Metro retains the ability to update the data sources, analytics, and methodology as needed given new sources of data and lessons learned from its application. The Line Benefit Score may identify strengths and weaknesses in the interrelationship between lines/routes and also provide decision-makers with a way to assess their relative performance versus one another when considering their contribution to the entire bus network.

This line/route evaluation rubric is a way to easily measure and compare the performance of each route based on ridership, demographics, and the network value of the route. It results in a benefit score for each line/route on a variety of factors and visually displays the results in an easy to understand graphic (**Figure 4**). The purpose of this rubric is to provide a mechanism to visually compare routes and identify and prioritize investments and improvements when resources are limited.

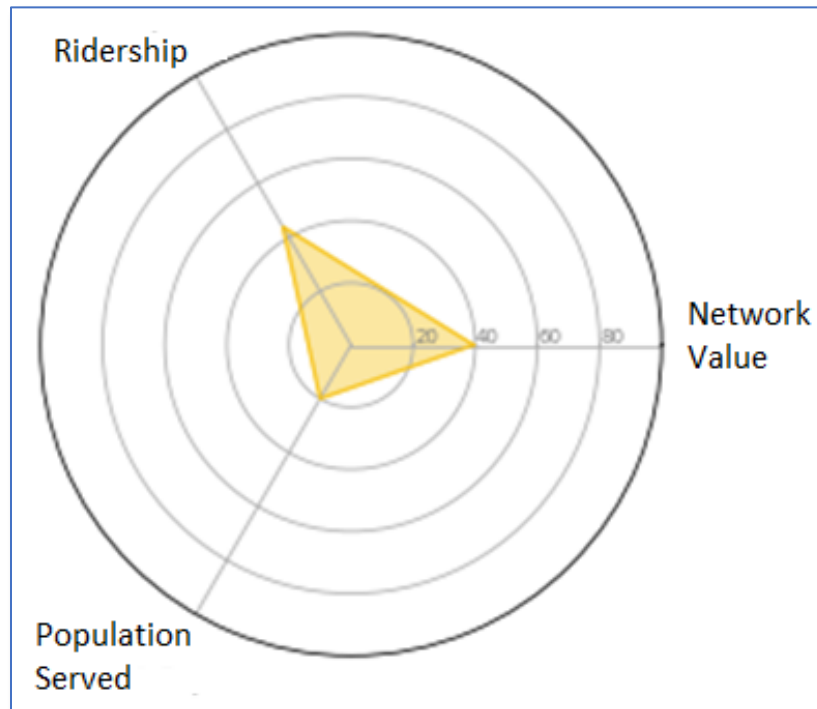
For this evaluation, each route will be compared to three key characteristics:

- **Ridership:** Total average weekday ridership measures the demand for the line/route.
- **Population Served:** Not all line/routes have the same purpose. Each service type has its own function within the transit network. Therefore, each service type will be measured against access by one of the populations below:
  - **General Population (BRT/Framework Services):** Providing access to high frequency service to as many people as possible is important to the success of a region's transit network. This metric is measured by the percentage of the population (using Census data) within a half mile of a bus stop.
  - **Transit-dependent (Coverage Services):** Access to routes for transit-dependent<sup>7</sup> populations is a way to value social equity. A line/route provides greater benefit if it provides access to people with limited transportation options. This metric is measured by the percentage of the transit-dependent population within a quarter mile of a bus stop.
  - **Commuters (Commuter Services):** Commuter ridership is a way to evaluate routes focused on providing efficient transportation options to employment opportunities. This metric is measured by the percent of the jobs within one quarter mile of a bus stop on the destination end of a route and the population within a half-mile of the route at the origin end of the route.
- **Network Value:** The value of the route to the network acknowledges that each bus line/route does not stand alone; bus services comprise a critical element of the overall transit network. This component includes three subcomponents: transfers, unique access for people, and access to destinations.

<sup>7</sup> Transit-dependent is defined as low-income or zero-car households.

- **Transfers:** The number of transfers (e.g. bus to bus or bus to rail transfers) from that line/route to the rest of the transit network gives the line/route credit for its role as a feeder into the system.
- **Unique Access for People:** This metric examines the percentage of ridership that occurs on unique segments of a line/route that are not served by other lines/routes, including local jurisdictional partners.
- **Access to Destinations:** The number of jobs the line/route serves.<sup>8</sup>

**Figure 4 | Example Framework Route Evaluation Graphic**



Once these individual metrics are evaluated, then a Line Benefit Score will be developed for each line/route. This score will enable Metro to prioritize the line/routes that should be addressed during the planning process. With limited resources, not all lines/routes will be able to be brought up to meet the guidelines.

This score is a composite index of the ridership, population served, and network value scores. As of December 2020, each component is weighted equally. The weights can be revised annually by Metro, prior to annual service planning based on priorities at the time.

- **Ridership:** 33.3 percent
- **Population:** 33.3 percent
- **Value to the network:** 33.3 percent

<sup>8</sup> Uses Metropolitan Washington Council of Governments Round 9.1a Cooperative Forecast data

## 7. Performance Improvement Plan

Establishing guidelines and applying them to improve service are two different things – the latter will take time and continuous attention to bus route/line performance. While the service guidelines provide Metro with an understanding of how specific lines/routes meet a variety of metrics, they do not provide the necessary guidance on how to determine which lines/routes may see improvements, especially when resources are limited. This section identifies the framework to modify existing service or for adding new services.

### 7.1. Annual Line Performance Reports

Annually, Line Performance Reports for each line should be prepared to provide data on level of service, accessibility, and performance data as well as an update of its Line Benefit Score. These reports would be available at the same time as first presentation of the budget for the upcoming fiscal year. Typically, the service type and tier, level of service, and accessibility data are unlikely change year over year unless there has been a significant change to the line/route or its adjacent land use. However, service performance can change and those measures should be reviewed according to the metrics and targets outlined above. The Annual Line Performance Report should provide information to allow for actions that can be made to modify service (frequency or alignment changes).

#### 7.1.1. Evaluation and Scoring

Each line will receive an overall grade on an A through E scale. These grades are comprised of scores for each guideline and performance metric outlined above compared to the target/standard that is established in the service guidelines.<sup>9</sup>

For each metric, lines/routes are assigned a score of 0 through 4, corresponding with letter grades as follows: A=4; B=3; C=2; D=1; and E=0. Ultimately, these individual metric scores are averaged to produce the overall grade. As of December 2020, all metrics currently weighted equally in developing the overall line/route score.

**Table 18 | Overall Grade**

Grade	Recommendation	Normalized Rating (for grade calculation)	
		Greater than or equal to	Less than
<b>A</b>	Exceeds	3.6667	4.0000
<b>B</b>	Meets	2.6667	3.6667
<b>C</b>	Approaches	1.6667	2.6667
<b>D</b>	Below	0.6667	1.6667
<b>E</b>	Significantly Below	0.0000	0.6667

<sup>9</sup> While the grading for the majority of metrics apply at both the line and route level, some metrics only apply at either the route or line level. Metrics that are only assessed at the line level include: Span of Service, Frequency of Service, Branch Productivity, Parallel Corridors while Stop Frequency and Circuity are only assessed at the route level.

## 7.2. Justification of Service Changes

The Line/Route Service Performance Measures (Chapter 4) demonstrate the productivity and efficiency targets that provide staff with the justification to add, restructure, or reduce service to improve performance and assure adequacy of service to the riding public. By evaluating all lines/routes against targets, it is possible to identify lines/routes where additional service will benefit passengers, as well as lines/routes where a reduction of service could enhance economic return to the region. For lines/routes that are within 80 percent of the target or better, the lines/routes would be considered acceptable. For lines/routes that are below 60 percent of the target, the lines/routes would be considered unacceptable and be considered for major changes or elimination. Those between 60 and 80 percent will be reviewed for possible modifications.

### 7.2.1. Major Restructuring or Elimination of Existing Services Justifications

Line/routes that are below 60 percent of the established targets and have a low Line Benefit Score should be evaluated for restructuring or elimination. Depending on the situation, restructuring might include, but not be limited to:

- Alignment/stop adjustments
- Level of service changes
- Changes to service type
- Other operational changes.

Any subsequent restructuring should be conducted in accordance with Metro's public involvement processes, including Title VI, Environmental Justice, and other applicable equity analyses and measures. Typically improvements would be made to a line and then evaluated for 18 months. If after 18 months the line's performance is still not meeting the targets, the line may be considered for elimination.

### 7.2.2. Adjust Existing Services Justifications

For changes to existing service the following factors might include, but not be limited to:

- Ridership potential
- Added travel time for existing passengers
- Transfer connections
- Existing coverage

These factors give a good indication of the potential success of a proposed adjustment to existing service. There may be a strong political push that an adjustment be made to an existing service regardless of the outcome of the New Service Evaluation. The goal of the evaluation is not to make the decision if a service change should be implemented, but to provide our professional judgment regarding the potential success of a proposed service change.

### 7.2.3. New Service Justification

In addition to restructuring, there may be a need to add new service, typically at the request of Metro's jurisdictional partners. In such instances, any requests for new services should be evaluated based on, but not limited to, the following criteria:

- Transit potential (people plus jobs) index
- Projected ridership
- Projected operating costs
- Projected fare revenue
- Key characteristics and demographics of the market

### 7.3. Post Implementation Review of Service Requests

After a recommended new service or existing service change is implemented its performance should be monitored. At the end of 18 months, when ridership on the new or adjusted services will generally have approached its "mature state," passenger counts should be taken, and the performance of the route reviewed. Based on its performance and in concert with local jurisdictions and in accordance with Metro's public involvement processes, including Title VI, Environmental Justice, and other applicable equity analyses, a decision concerning its future should be made.

New or major service changes are subject to a detailed performance review at the conclusion of the eighteen-month trial period. If the minimum threshold targets are not being achieved, or if the actual ridership of the route is below that forecast, the service is either recommended for elimination or changed to improve its performance. Metro, in discussions with the local jurisdictions, may also consider giving it additional time to improve if ridership trends indicate that it may achieve the minimum threshold. Services which meet or exceed the minimum thresholds would be made permanent.

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## 8. Summary of Peer Transit Agency Service Guidelines

Below are two tables that reflect the service guidelines from many of Metro's peer agencies, both nationally (**Figure 5**) and within the Washington region (**Figure 6**) and how Metro's current guidelines compare. As shown below, Metro's peers tend to have significantly more guidelines that reflect the customer experience. Additionally, the majority have been updated in recent years, likely to reflect advancement in data availability and analysis skills. Our local partners also tend to utilize guidelines that reflect the customer experience. All have been updated since 2014, with many more recently, typically as part of their Transit Development Plan.



**Figure 5 | Peer Comparison for Bus Service Guidelines**

	Year	Span of Service	Service Headway	Stop Frequency	Coverage	Route Design	Reliability	Comfort	Productivity	Effectiveness
<b>Metrobus Current</b>	2000							X	X	X
<a href="#">MBTA</a> Boston, MA	2017	X	X		X		X	X		
<a href="#">MTA</a> Baltimore, MD	2017		X		X		X	X		X
<a href="#">NYCT</a> New York, NY	1986		X	X	X		X	X	X	X
<a href="#">SEPTA</a> Philadelphia, PA	2020	X	X	X	X	X	X	X	X	X
<a href="#">LA Metro</a> Los Angeles, CA	2019	X	X	X		X	X	X		
<a href="#">MARTA</a> Atlanta, GA	2018	X	X	X	X		X	X	X	X
<a href="#">CTA</a> Chicago, IL	2014		X	X	X		X	X		
<a href="#">MDT</a> Miami, FL	2009	X	X	X	X	X	X	X	X	X

**Figure 6 | Comparison of Local Bus Provider Service Guidelines**

	Year	Span of Service	Service Headway	Stop Frequency	Coverage	Route Design	Reliability	Comfort	Productivity	Effectiveness
<b>Metrobus</b>	2000							X	X	X
<a href="#">DC Circulator</a> Washington, DC	2014		X	X			X		X	X
<a href="#">ART</a> Arlington County	2016	X	X	X	X		X	X	X	X
<a href="#">CUE</a> City of Fairfax	2017	X			X		X		X	X
<a href="#">DASH</a> City of Alexandria	2019				X		X			X
<a href="#">Fairfax Connector</a> Fairfax County	2016	X	X	X			X	X	X	X
<a href="#">Loudoun County Transit</a> Loudoun County	2019	X	X	X			X	X	X	X
<a href="#">Ride On</a> Montgomery County	2017		X		X		X	X	X	X
<a href="#">TheBus</a> Prince George's County	2017	X	X			X			X	

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