2020 Strategic Plan | November 2020

METRO


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Glossary

METRO	METRO Regional Transit Authority
ACS	American Community Survey
ADA	Americans with Disabilities Act
AMATS	Akron Metropolitan Area Transportation Study
BRE	Business Retention and Expansion
BRT	Bus Rapid Transit
CAFR	Comprehensive Annual Financial Report
CCMS	Customer Care & Mobility Solutions Department
CEO	Chief Executive Officer
CIP	Capital Improvement Plan
CNG	Compressed Natural Gas
COTA	Central Ohio Transit Authority
COVID-19	Coronavirus Disease 2019
EEC	Employee Engagement Center
EIA	Energy Information Administration
FIN	Finance Department
FTA	Federal Transit Administration
FY	Fiscal Year
GCRTA	Greater Cleveland Regional Transit Authority
GDRTA	Greater Dayton Regional Transit Authority
HOPE	Federal Transit Administration Helping Obtain Prosperity for Everyone Program
KPI	Key Performance Indicator
LEHD	Longitudinal Employer-Household Dynamics
MAIN	Maintenance Department
METRO	METRO Regional Transit Authority
NCX	Northcoast Express
NTD	National Transit Database
OD	Origin-Destination
ODSA	Ohio Development Services Agency
OH	Ohio
OPS	Operations Department
PARTA	Portage Area Regional Transportation Authority
PR&M	Public Relations & Marketing Department
PSD	Planning & Strategic Development

Glossary, continued

QR code	Quick Response code
RKP Transit Center	Robert K. Pfaff Transit Center
S&P	Safety & Protection/Chief of Police Department
SARTA	Stark Area Regional Transit Authority
SCAG	Southern California Association of Governments
TAM	Transit Asset Management
TIP	Transportation Improvement Program
TNC	Transportation Network Company
TOD	Transit-Oriented Development
UA	University of Akron
UPD	Unified Planned Development
US	The United States of America
VA	Veterans Administration

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1. Introduction

METRO's Strategic Plan comes at a time of great challenge and great opportunity for the public transportation industry as a whole and METRO as an organization. Like many other US transit agencies, METRO has been facing falling ridership, rising costs, and uncertain revenues – a trend that has only been amplified by the economic disruption of the COVID-19 pandemic.

To meet the challenges of serving in this current era, the transit industry is adapting with new technology, innovative service approaches, and the launching of new and innovative microtransit and transportation network companies. This is gradually changing the way traditional transit serves communities, creating new opportunities to meet a wider variety of transportation needs.

Aside from the momentum for change in the industry, several key qualities at METRO reveal that the organization is positioned to evolve from its traditional role as the transit provider in Summit County. This includes a uniquely dedicated team and family-like atmosphere that are evidence of METRO's organizational stability. In addition, METRO's top leaders are energetic, innovative and focused on enhancing community relationships and attracting new support for transit in Summit County. Furthermore, the conditions of METRO's service area indicate the need for focused service along several high-ridership transit corridors and the use of adaptive transportation solutions in other areas of the county. Lastly, several current and planned community and economic development initiatives are well suited for investment in transit-supportive infrastructure in order to improve the region's access to opportunity.

It has never been more important to have a supportive strategic focus and directed action plan for METRO's future. To do so, the first step of the strategic planning process was to set the goals for the next ten years. These goals were developed based on METRO's vision, mission statement, and core values (approved by the Board of Trustees in 2017), with input from METRO's leadership and planning teams, and input from METRO's Board of Trustees in a project workshop in January 2020. Figure 1-1 shows METRO's goals for the plan. With goals in hand, a deliberate and focused direction for the plan was established.

The development of the plan is organized around three questions:

Figure 1-1:

Strategic Plan Goals

- Improve Service Quality and Cost Effectiveness
- Expand Collaboration with Community Partners
- Implement Innovative Service Approaches
- Create Economic Opportunity
- Develop Action-Oriented Plan
- Emerge Nationally as a Recognized Mid-Sized Transit Agency

The first question, "where are we now?", establishes the foundation of the plan and identifies any existing conditions that might influence the agency's goals or mission. The answer to this question was formed by extensive data analysis (of both METRO's existing operations and market forces largely beyond METRO's control) as well as by thorough public outreach and agency inreach processes. This information is presented in detail in Chapters 2, 3 and 4 of this report.

To answer the second question, "where are we going?", the team utilized the information gathered through the analysis, outreach and inreach processes to identify gaps in existing service offerings and to formulate the vision for the future.

Finally, the Recommended Strategies and Action Matrix found in Chapter 5 set a clear path forward for METRO to answer the final question of "how do we get there?"

This strategic plan is METRO's roadmap for development over the next ten years. Based on analysis of METRO's service, the Summit County transit market, and input from METRO customers, community leaders, the public, and METRO team members, the plan defines the agency's goals and vision and identifies gaps and unmet needs.

The plan outlines strategies and actions to transition METRO into the role of Summit County's Regional Mobility Provider. As a regional mobility provider, METRO will work with public and private partners from throughout the county to identify transportation needs, and to select or create the best and most cost-effective solution from among a range of potential programs and funding options. This transition would redirect METRO's focus from operating bus services to providing and facilitating transportation solutions that support mobility and economic development. A detailed action matrix provides METRO with a step-by-step guide to implementing the recommended strategies that will complete this organizational shift by 2030.

METRO is committed to ensuring that over the next ten years, the framework of this plan will guide decision-making at the agency. While implementation strategies may need to adapt and evolve, the organization is committed to ensuring that METRO supports the mobility needs of Summit County into the coming decade through the lens of the plan recommendations.

2. State of the System

The analysis of METRO's current transit system began with a thorough review of the data documenting METRO's financial and operational performance. The State of the System review included a detailed analysis of METRO's operating performance on both fixed-route and demand response services.

This included a peer review that compared METRO's services to those of six similar transit agencies in six similar US cities (Dayton and Toledo, Ohio, Des Moines, Iowa; Grand Rapids Michigan; Madison, Wisconsin; and Knoxville, Tennessee). These peers are similar to METRO in the number of vehicles and employees, have a similar-sized budget, and serve regions that are similar to Summit County in population and service area size, regional economy, and weather. A detailed summary as well as peer comparison charts are provided in Appendix 1. The review also analyzed METRO's financial performance and the agency's financial outlook over the next ten years.

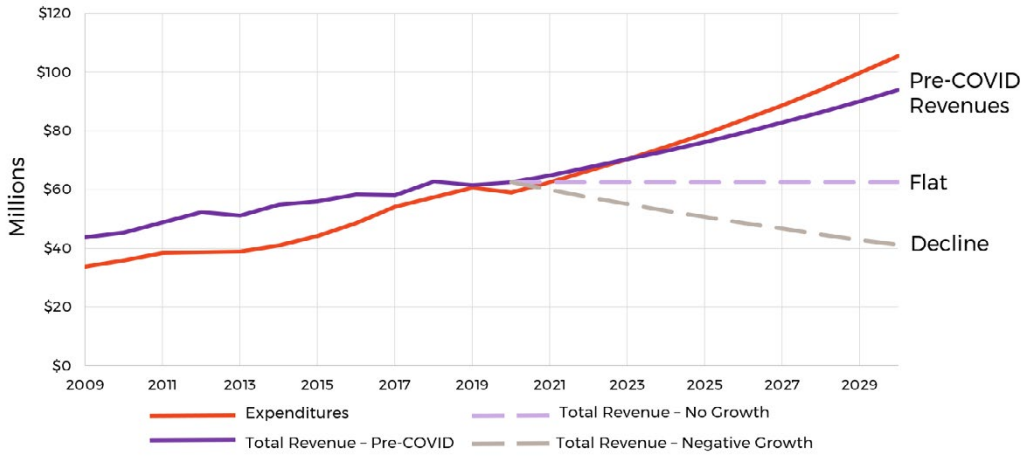
Emerging from this analysis were three key trends (Figure 2-1):

- Fixed-route ridership is declining, falling 10% between 2014 and 2019.
- Operating expenses are rising, increasing more than 25% between 2014 and 2019.
- Sales tax revenues increased from 2014 to 2018, before falling again in 2019. Sales tax revenues are volatile, and future revenues are unpredictable.

These three trends conflict and are unsustainable; and they may also be compounded by the impacts of the COVID-19 pandemic. METRO has developed multiple projections of future total revenues based on METRO's assumptions on future sales tax revenues, student fare assistance, interest income and other non-transportation revenue (Figure 2-2). However, none of these revenue projections show METRO being able to keep pace with rising expenditures if they continue to grow at the rates they have in recent years. The following sections examine each of these trends in greater detail.

Figure 2-1: Three Key Trends

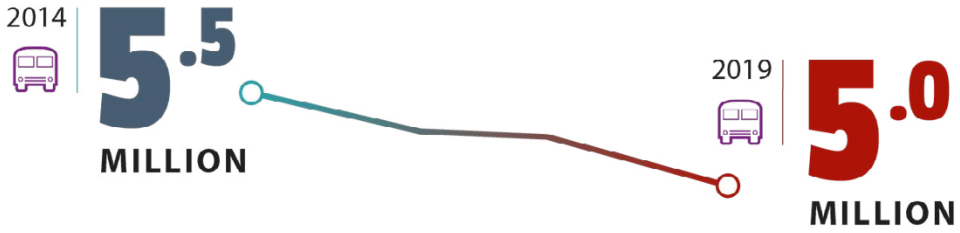
Figure 2-2: Actual METRO revenue and expenditures 2009-2019, and projected revenue and expenditures 2020-2029.



2.1 Service and Ridership Trends

METRO offers two main categories of services: fixed-route and demand response. In 2019, METRO carried fewer than 5 million trips across both categories, down from 5.5 million trips in 2014, a loss of more than 9%, as shown in Figure 2-3.

Figure 2-3: METRO Annual Total Ridership Trend, 2014-2019 NTD



This mirrors a nationwide trend affecting most US transit agencies of all sizes, as shown in Figure 2-4 below. In the same time period, ridership on US transit systems declined by an average of 8% and METRO's peer transit agencies experienced an average drop in ridership of 13%. Between 2018 and 2019, METRO's ridership fell by another 3.5%, and stood at less than 5 million annual trips.

Figure 2-4: METRO, Peer Agency and National Annual Total Ridership Trends, 2014-2018 NTD

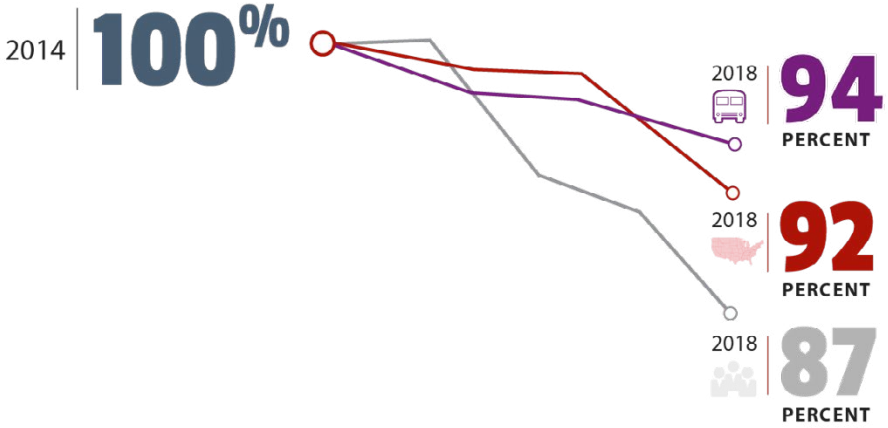


Figure 2-5: METRO Annual Total Ridership Trends, Broken Down by Type of Service, 2014-2019 NTD

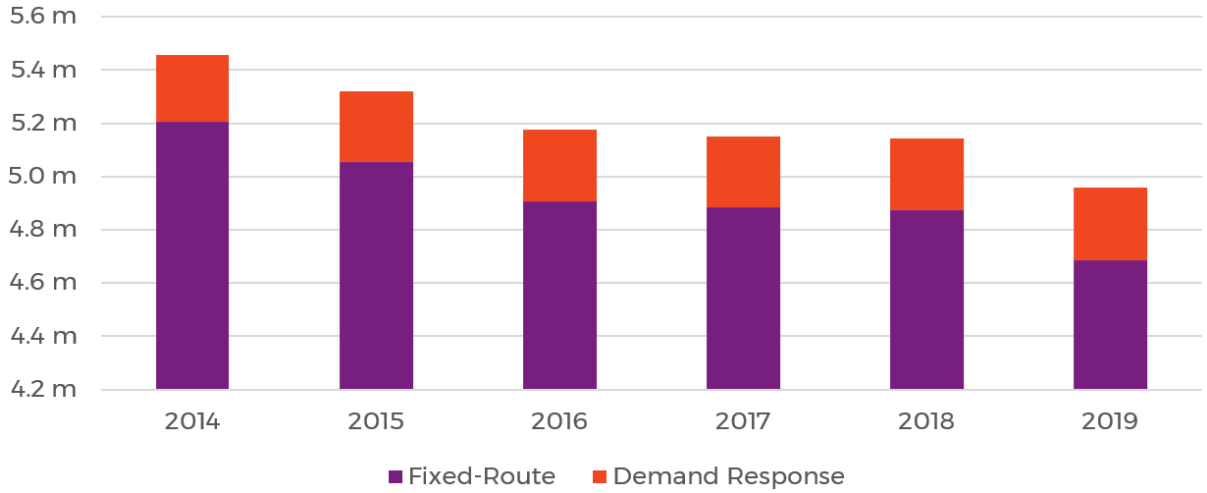


Figure 2-5 shows the breakdown of ridership by service. All of METRO's ridership decline over the past decade occurred on the fixed-route bus system, which carries most METRO riders (94% in 2019). Ridership on the fixed route service declined 10% from 2014 to 2019. The Market Analysis section of the report explores some of the possible reasons for this decline. METRO's demand response services added about 22,000 annual trips over the same time period.

2.1.1 Fixed-Route Bus Service

As of January 2019, METRO operated 37 fixed-route bus lines. Most of the routes connect at METRO's Robert K. Pfaff (RKP) Transit Center which is located on the southern edge of downtown Akron. Of these, 25 are local bus routes that operate in Akron and nearby suburbs. Five are town center routes that connect downtown Akron to northern Summit County and the City of Green. Two are express routes - North Coast Express (NCX) 60 connecting Cuyahoga Falls, Hudson and Twinsburg to downtown Cleveland and NCX 61 connecting downtown Akron and Fairlawn/Montrose to downtown Cleveland and University Circle. DASH, a downtown circulator route, connects the RKP Transit Center with downtown Akron and the University of Akron.

Before the service reductions that were made necessary by the COVID-19 pandemic, METRO operated four circulators that connected suburban areas to local transit hubs, where customers could connect with other bus routes. METRO also operated a grocery bus service that serves a different route each weekday. These routes connect apartment complexes, and senior housing developments to nearby grocery stores

Regional fixed-route connections between Summit County and nearby counties, except Cuyahoga County, are provided by surrounding transit agencies and transportation providers. A route to Kent, operated by Portage Area Regional Transit Authority (PARTA), and another to the Belden Village area and downtown Canton, operated by Stark Area Regional Transit Authority (SARTA), connect with METRO's fixed-route network at the RKP Transit Center. The Transit Center also is a terminal for Greyhound intercity bus service.

METRO's current fare for a single ride on local fixed routes is $1.25. Customers can pay cash (exact change) on the bus, or purchase a single ride pass at RKP Transit Center. METRO does not offer transfers, but customers can purchase a single-day pass for $2.50 for unlimited rides within a single day. A seven-day pass, good for unlimited rides for seven consecutive days, costs $15, and a 31-day pass is $50. Fare on METRO's North Coast Express (NCX) routes to Cleveland is $5, or $40 for a ten-ride ticket.

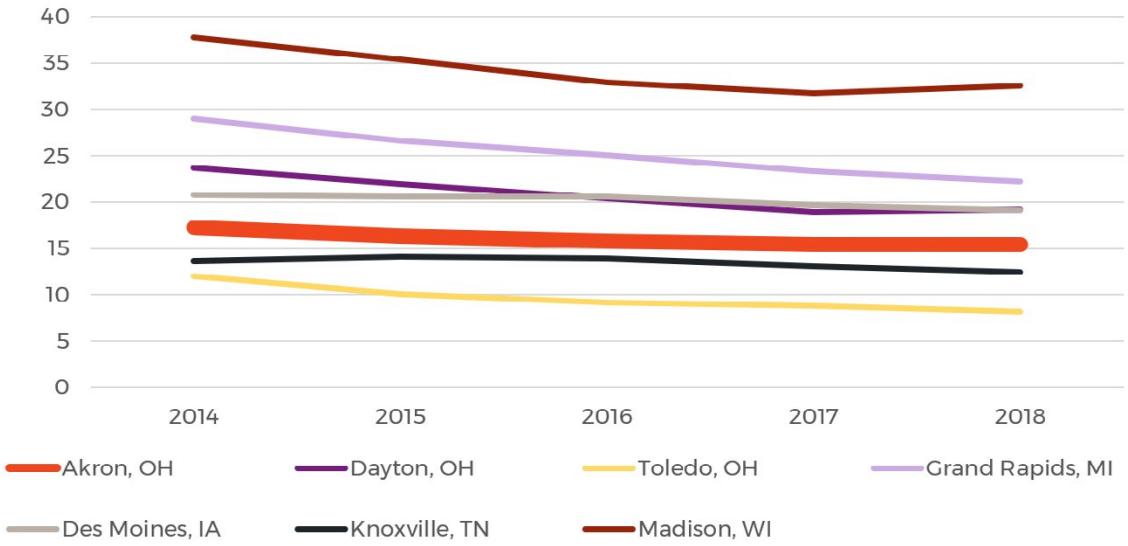
Up to two children age five and under ride free with a fare-paying adult. Customers who are disabled or age 62 or over can ride METRO's fixed route services for $0.50 for a single ride, or $30 for a 31-day pass. All passes are available at METRO's Robert K. Pfaff Transit Center, and all accept the single ride pass are available at METRO's offices on Kenmore Boulevard and at all Dave's and Giant Eagle grocery stores in Summit County. All of these options also are available on METRO's EZFare smartphone fare payment application.

Ridership on the fixed-route bus system declined from 5.2 million in 2014 to 4.7 million in 2019, as shown in Figure 2-6 below. This ridership decline is consistent with a national trend of declining ridership on US transit systems since 2014.

Figure 2-6: METRO Fixed-Route Service Annual Total Passenger Trips, 2014-2019 NTD

The ridership decline caused METRO's productivity to drop from 17.3 in 2014 to 15.5 in 2018, as measured in average unlinked passenger trips per revenue hour of service. This productivity metric puts METRO as one of the lower performers in its group of peer transit agencies (Figure 2-7). In addition, operating expense per passenger trip increased from $6.45/trip in 2014 to $8.52/trip in 2018. On this measure, METRO was near the top of its group of peer agencies with a higher cost per trip than most (Figure 2-8 on the next page).

Figure 2-7: Fixed-Route Unlinked Passenger Trips per Revenue Hour, 2014-2018 NTD



Most passenger trips on METRO are carried by only a few bus routes, as illustrated on the next page in Figure 2-9. Two routes in red, Route 1 (Market Street) and Route 2 (Arlington) together carried about 22% of all passenger trips in 2019. The top eight ridership routes (1, 2, 3, 6, 8, 10, 14, and 17; Routes 3 to 17 are shown in light red) carried more than half of all passenger trips. In contrast, the five town center routes, two express routes, four circulators, and the grocery routes (colored in light purple) together carried only 7% of all passenger trips. The rest of the routes are shown in dark purple.

Ridership on some of METRO's busier routes, such as Routes 1 and 2, was so high (in 2019 and earlier), that passengers often had to stand. Experience in other cities has shown that, if more service is added to routes with standees (by reducing the time between buses on the route), the route will attract even more riders. For example, in 2018, with its ConnectTen initiative, Detroit Department of Transportation (DDOT) reduced headways to 15 minutes on their ten busiest bus routes, which together carried more than 60% of trips on their network and experienced late running and crowding during some periods of the day. Ridership in Detroit increased by 1.3 million (5.5%) between fiscal years 2018 and 2019.

Figure 2-8: Fixed-Route Operating Expense per Unlinked Passenger Trip, 2014-2018 NTD

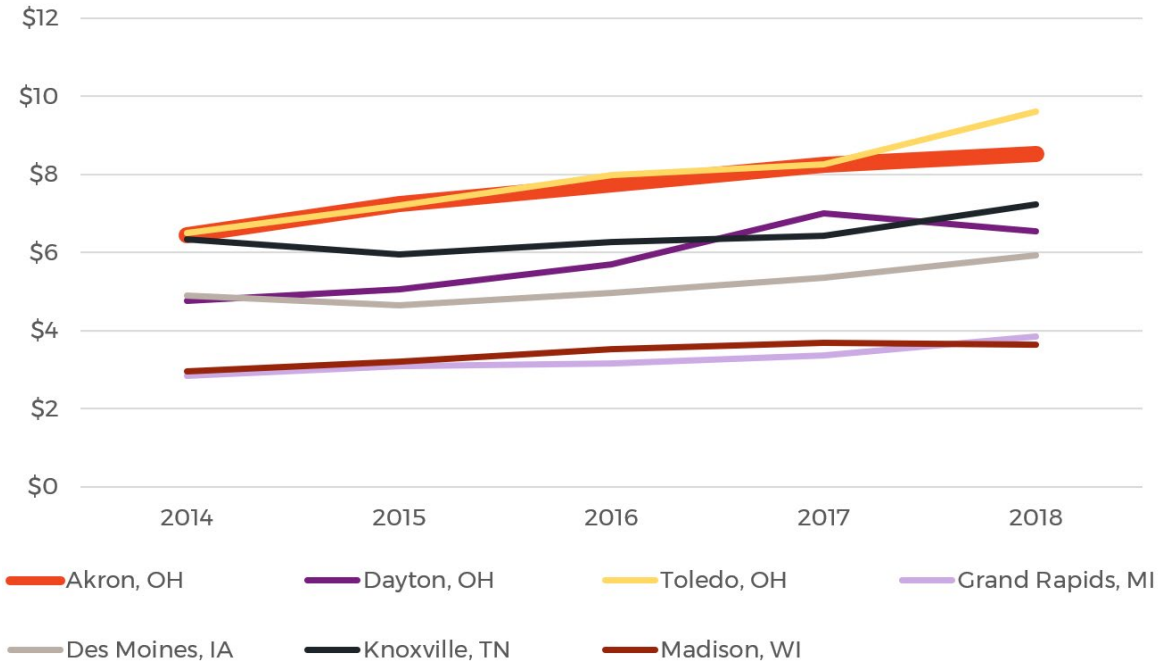
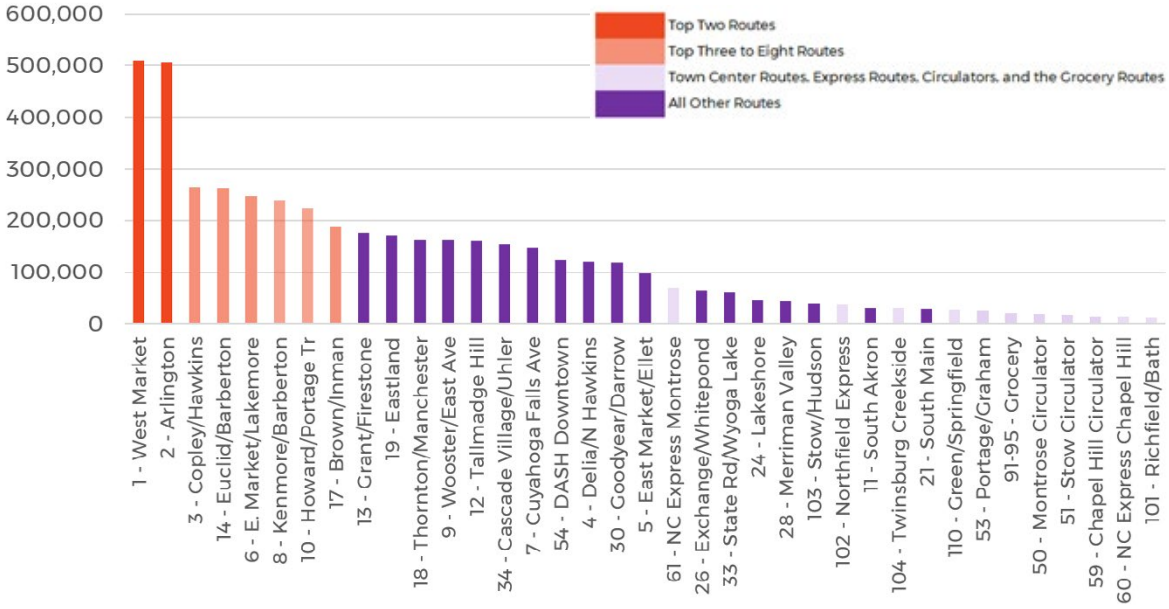


Figure 2-9: Annual Total Boardings by Route, 2019



In 2018, METRO's average operating expense per passenger trip on fixed-route service was $8.52. However, the average cost per trip on some of METRO's lower-ridership routes was many times higher, as shown in Figure 2-10 on the next page.

Several of METRO's routes serve areas with lower population densities and few destinations that would attract riders from other parts of the city, thus generating few riders. On some routes, including the grocery routes and circulators, the cost per passenger trip is higher than on METRO's in-house demand response (which averaged $40.54 per trip in 2018).

METRO's lower ridership routes have a variety of challenges that make them less attractive to riders and contribute to their under-performance. A Transit Cooperative Research Program (TCRP) report - Synthesis 140, on bus network redesign projects identified several best practice design elements shared by successful recent network redesigns, including:

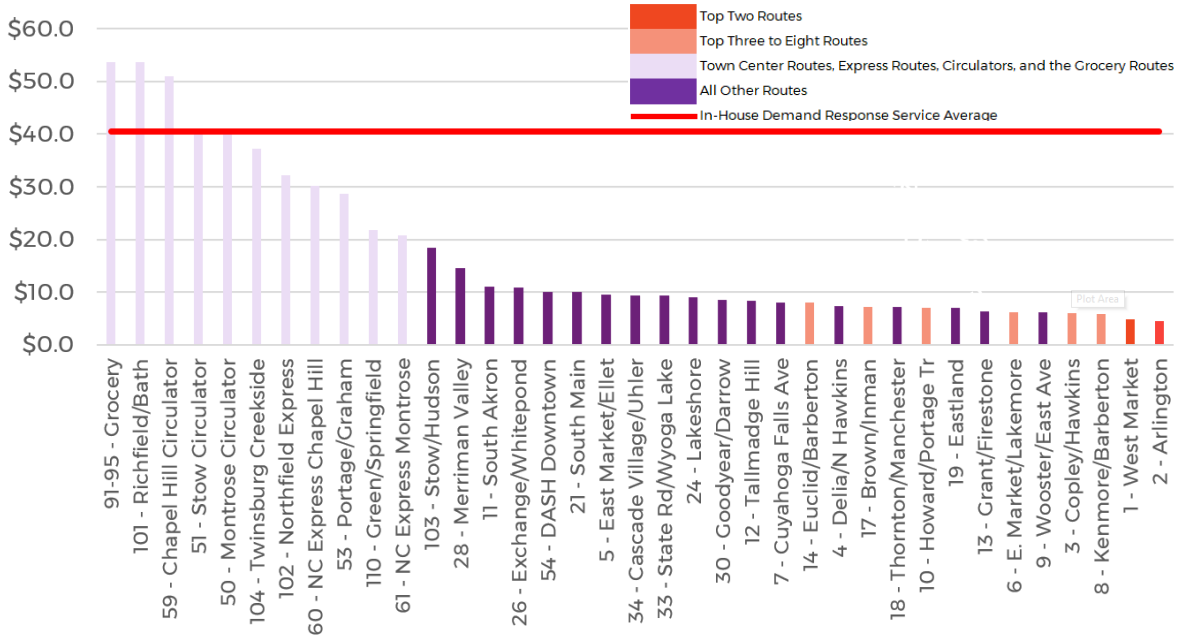
- Centering the redesign on a network of high-frequency, priority bus routes to provide a higher quality level of service
- Making the system easier to use, by straightening out route deviations,
- Standardizing frequency, and
- Revising run and layover time to improve on-time performance and service reliability.

Some of METRO's existing routes, like the neighborhood circulators, grocery routes, and X60 Northcoast Express, do not connect at RKP Transit Center to facilitate transfers. While some transit agencies operate so-called "crosstown" bus routes that bypass the downtown area and directly connect destinations at opposite sides of the city, such routes rarely attract many riders in cities where most bus routes operate headways of 15 minutes or longer, for several reasons:

- Downtown areas, like downtown Akron, offer the densest concentration of jobs in the region and are major destinations for governmental services. Downtown Akron also is the region's most important destination for medical and higher education trips.
- Routes that connect downtown offer transfer connections to most routes in the system, giving customers the opportunity to reach anywhere in the network with one transfer; crosstown routes offer connections only to the routes whose alignments they cross along the way.
- Downtown connections often are made at regular "pulse" times, when all routes come together to facilitate transfers every hour or half hour; crosstown routes cannot similarly coordinate transfer times, leading to long waits for transfers to crossing routes.
- Downtown transit hubs offer a safe and comfortable indoor space for people to wait for transfers; crosstown routes usually offer, at most, a bus shelter in which passengers can wait for their transfer.

Other METRO routes lack well-timed connections to other routes at the transit center to allow for seamless transfers, still others have indirect routings and complicated schedules that make using the system confusing and increase travel time.

Figure 2-10: Average Cost per Passenger Trip by Route, 2019



2.1.2 Demand Response Service

METRO's demand response service offers six separate programs:

- SCAT Senior
- SCAT Temporary
- Complementary ADA
- Call-A-Bus
- METRO Connect
- Other programs (contracted services)

Other than the last two programs, METRO's demand response service require pre-registration and day-in-advance trip booking and each program has a different fare policy. Customers using ADA service must be certified by METRO. Each program is described in detail below.

SCAT Senior

The SCAT Senior service began in 1973, and serves Summit County residents aged 62 and over. Customers are limited to one round-trip per day, for either medical or work purposes. Other types of trips may be accommodated depending on availability of service. SCAT Senior operates Monday to Friday, from 6 AM to 6 PM in the core of Summit County, and from 8 AM to 4 PM in outlying areas. Users must register with METRO to use the service by submitting an application with proof of age and residency. Trips are booked one day in advance, with subscription service available for regular trips. Fare is $2 each way, and ten-ride tickets are available for $20 at all METRO pass outlets, or on the EZFare smartphone application.

SCAT Temporary

SCAT Temporary service serves residents who have disabilities and cannot access METRO's fixed-route services, regardless of age. SCAT Temporary service may be used only for medical and work trips. Applications for SCAT temporary service must be completed by a medical professional treating the customer. Service times, booking arrangements, and fare policies are the same as the SCAT Senior program.

Complementary ADA (ADA)

METRO's ADA service was implemented after passage of the Americans with Disabilities Act (ADA) in the early 1990s and provides complementary paratransit service to METRO's fixed route bus service as required under Federal Transit Administration (FTA) service requirements. ADA service is open to disabled customers, provides trips that begin and end within 3/4 mile of METRO's fixed route bus routes, operates the same hours as the fixed routes, and charges a fare that is twice the fixed route bus fare (currently $2.50 for a single ride, twice $1.25 fixed route fare)—all meeting the FTA requirements under ADA. Ten ride passes are $25 and are available at all METRO pass outlets and on the EZ Fare app. METRO's ADA service is limited to those who have qualifying disabilities that prevent them from using METRO's fixed route service. Like SCAT Temporary service, the application for ADA service must be completed by a medical professional currently treating the customer. Trips can be reserved up to three days in advance, but no less than one day in advance. Subscription reservations are not available.

Call-A-Bus

Call-A-Bus is a curb-to-curb service open to both disabled and non-disabled customers, introduced by METRO in 2015. The service is available Monday to Friday from 7 AM to 5 PM, for trips beginning and ending within Macedonia; Northfield Village and Township, Reminderville, Sagamore Hills, and Twinsburg City and Township. A similar service with slightly shorter service span (8 AM to 4 PM) is available in the City of Green. Call-a-Bus also offers trips to METRO's fixed-route bus stops within Summit County for those who need to travel beyond walking distance of one of METRO's fixed routes. Customers are required to make reservations one business day before their trip. Fare is $4.00 per trip.

METRO Connect

METRO Connect is a pilot service that was introduced in September 2020. The service provides convenient trips between bus stops on Routes 51, 53, and 59, for riders who contact METRO ahead of time by phone. The service is available Monday to Friday from 7 AM to 5 PM. Fare is $1.25 per trip, the same as METRO's fixed-route service. Although the service does not require riders to reserve their trips one business day ahead of their travel, riders are encouraged to do so in order to receive a guaranteed trip.

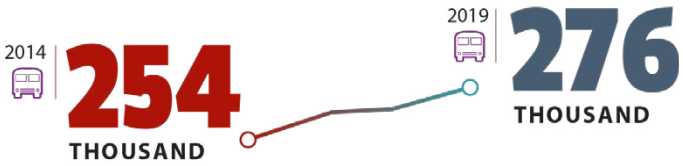
Contracts with Third Party Organizations

METRO also provides demand response service for organizations on a contract basis. The day(s) of service, service span, and costs are defined by the contract between METRO and the contracting organization. The service may be billed either by trip or by mile, but at a higher rate than METRO's regular demand response service. Subscription service also is available for organizations with repeated travel needs.

In total, METRO's demand response services experienced an increase in ridership of 8.6% from 2014 to 2019, adding about 22,000 annual trips, as shown in Figure 2-11 on the next page. This is a small number of trips relative to the millions of trips METRO carries each year.

However, demand response trips are primarily door-to-door and several times more expensive than trips on fixed-route buses. In 2018, METRO's average demand response operating expense was $37.64 per passenger trip, compared to $8.52 per trip for fixed-route bus. METRO has moved up from third lowest to fourth lowest (or middle) of the transit agency peer group in the number of demand response trips they provide.

Figure 2-11: Demand Response Passenger Trips, 2014-2019 NTD

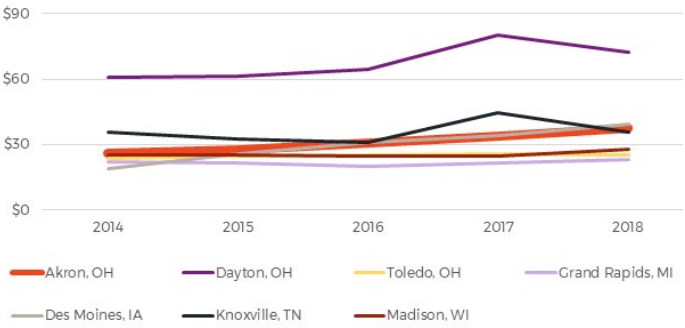


Operating expenses for METRO's demand response service increased 52.6% between 2014 and 2018. The percentage of METRO's operating budget dedicated to demand response service also increased in recent years, from 16.5% in 2014 to 19.7% in 2018. The size of the demand response vehicle fleet and workforce also has grown. METRO's demand response vehicle fleet grew from 85 vehicles in 2014 to 92 vehicles in 2018, and its workforce has increased from 92 to 116 employees during the same period. METRO supplements its in-house demand response resources with private operators to meet passenger demand for overflow trips and on evenings and weekends.

Demand response is a door-to-door service that is inherently far less operationally-efficient than fixed-route bus service and more costly to offer.

Demand response is a door-to-door service that is inherently far less operationally-efficient than fixed-route bus service and more costly to offer. In 2018, the average cost for METRO's demand response service was $40.54 for trips provided by METRO's in-house service, and $28.88 for trips provided by private operators, for an average $37.64 per trip across the system. This is significantly higher compared to $8.52 per passenger trip using fixed-route bus service. However, METRO's demand response service costs are not extraordinarily high compared to similar transit agencies. METRO's average cost of $37.64 per passenger trip for demand response service places it in the middle of its transit agency peer group for this cost-efficiency measure (Figure 2-12).

Figure 2-12: Demand Response Operating Expense per Unlinked Passenger Trip, 2014-2018 NTD



The ADA (Americans with Disabilities Act) requires METRO to provide complementary paratransit service for disabled customers within a three-quarter mile buffer around METRO's fixed-route bus routes. The SCAT Temporary program also provides trips to Summit County residents with disabilities, but costs less and is available county-wide, the only limitation is the one round-trip per day. The SCAT Senior program provides door-to-door service throughout the county, and is available to anyone age 62 and older, regardless of disability status, while the SCAT Temporary program provides door-to-door service throughout the county for people with disabilities, regardless of age. This is a much higher level of service than required by ADA or other FTA requirements, which do not require door-to-door for non-disabled customers, regardless of age. Because of the availability of the SCAT program, it can be assumed that many passengers eligible for the ADA service choose SCAT instead. Of the 276,328 demand response trips METRO provided in 2019, only 17,815 (7%) were provided under the ADA program. In 2019, about 30% of SCAT and ADA trips operated by METRO's in-house service were taken from locations within ¼ mile of a fixed-route bus stop, 60% were within ½ mile, and 94% were within ¾ mile. Those whose trips begin or end inside the fixed-route service area and are ADA-qualified, have to opportunity to use the ADA service as well.

2.1.3 COVID-19 Service Impacts

The COVID-19 pandemic caused transit agencies around the world to react quickly and make service adjustments to account for social distancing and, in some cases, a temporarily reduced workforce.

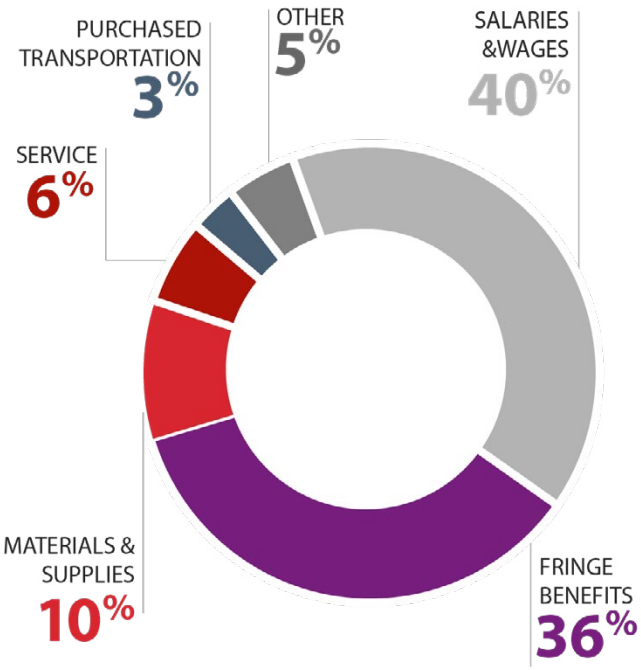
After initially reducing service in April 2020, METRO made some larger changes to the fixed-route schedule in June 2020 to re-align service to the routes that needed more resources and frequency in order to ensure social distancing. The new, simpler schedules have all routes that serve RKP Transit

Center depart at the same time each hour, which makes transfers among routes much easier for customers. Several low-performing routes, including the circulators, the DASH, grocery bus, and x60 Northcoast Express, were temporarily suspended to free up resources for more crowded routes. Further changes would best be addressed in a context of a comprehensive service redesign, which would consider reallocation of all network fixed-route services and how best to serve the areas covered by lower-productivity routes.

2.2 Operating Costs

METRO's operating expenses are comprised of six major categories, shown in Figure 2-13. In 2019, 76% of METRO's operating expenses were spent on employee compensation, about 10% of operating expenses were spent on materials and supplies, which includes fuel, tires, and fluids. Services accounted for 6% of expenses, while other expenses, including utilities, taxes, and insurance, accounted for 5%. Purchased transportation to supplement METRO's demand response services accounted for about 3%.

Figure 2-13: Annual Total Operating Expense by Expenditure Category, 2019 METRO Comprehensive Annual Financial Report (CAFR)

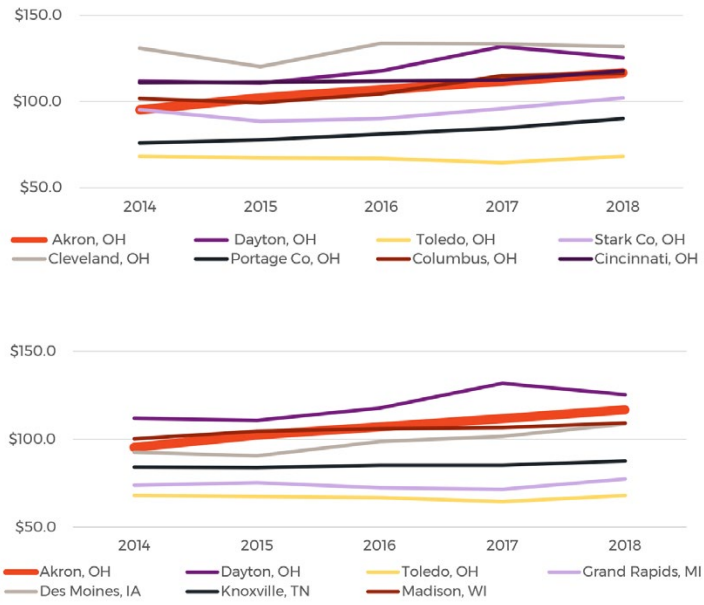


A six-year trend of total expenditures is shown in Figure 2-14. In 2019, METRO spent nearly $51 million on operations and maintenance. This represents an increase of more than $10 million since 2014, an increase of more than 25% in six years. Operating expenses increased for both fixed-route bus and demand response services.

Figure 2-14: METRO Total Operating Expenses, 2014-2019 CAFR

METRO's overall cost-per-hour of service is among the highest of its peer agencies and Ohio transit agencies, including both fixed-route and demand response service. This increase in operating cost occurred during a period when ridership was declining and during which METRO made few changes to its fixed route operations. This made METRO's service less cost-efficient and less cost-effective than it has been in the past. In 2018, METRO had the highest unit costs of service of its peer group (reflected in operating expense per hour and mile of service, and cost per passenger trip) for fixed-route bus metrics. This trend and comparison are show in Figure 2-15.

Figure 2-15: METRO, Peer, and Ohio Transit Agency Trends in Operating Expense, 2014-2018 NTD



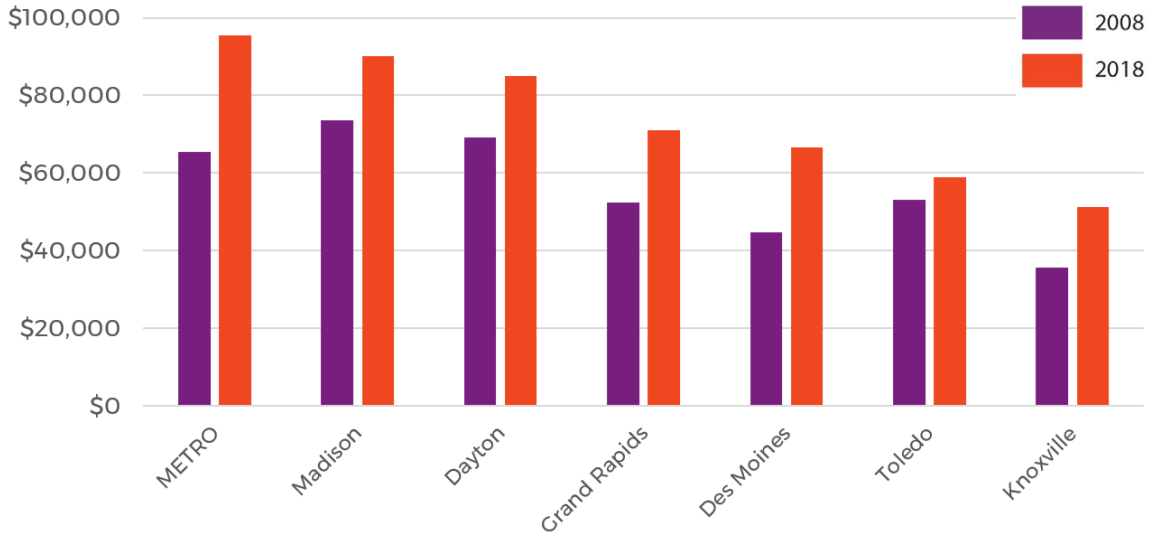
METRO's operating cost increases primarily were the result of increasing labor costs. Total labor costs per employee for all METRO employees (including 364 full-time employees and 46 part-time employees), were $95,500 in 2018, far higher than the $70,500 peer group average. See Figures 2-16 and 2-17.

METRO wages and salaries increased by 23% between 2014 and 2018. In 2008, METRO's average wage and salary costs per employee were about average for their peer group, and for Ohio's larger transit agencies. Since then, METRO's wages and salary costs have grown significantly, making METRO's current average salary and wages the highest among its group of peer agencies and the highest in Ohio, and among the highest in the US. See Figures 2-18 and 2-19.

METRO fringe benefit costs increased by 58% between 2014 and 2018. METRO's average fringe benefits per employee was high, at the third highest among peers and in Ohio in 2008. The increase of fringe benefits, however, was on par with most Ohio and peer agencies. METRO was still on the higher end, second among peers, third in Ohio, and 58th in the US. See Figures 2-20 and 2-21.

Figure 2-16: METRO, Peer and Ohio Transit Agency Trends in Labor Cost per Employee, 2008 & 2018 NTD

Peer Transit Agency Trends in Labor Cost per Employee



Ohio Transit Agency Trends in Labor Cost per Employee

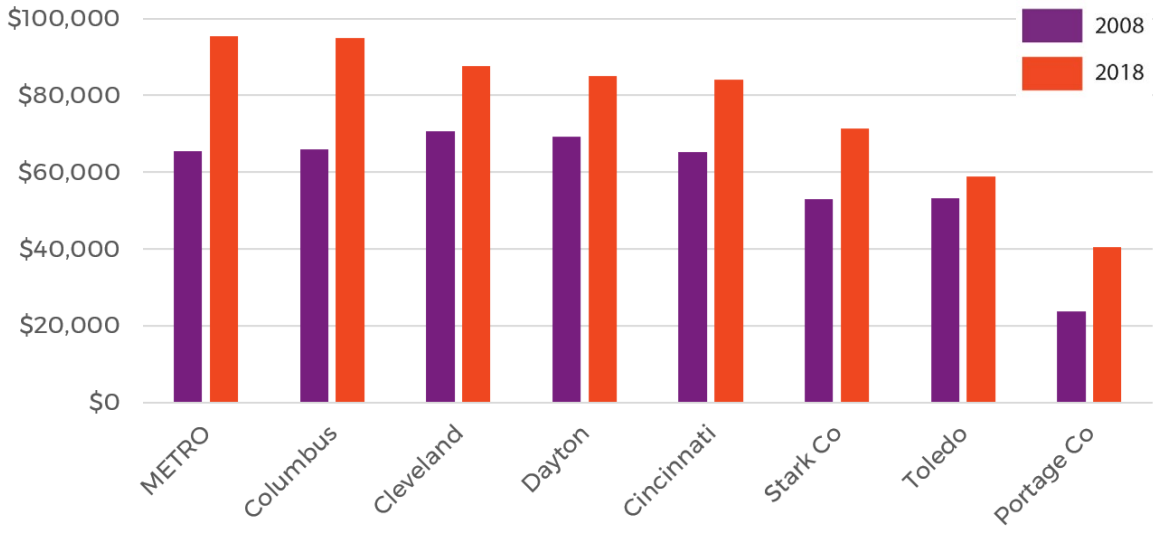


Figure 2-17: METRO 2018 Labor Costs per Employee Ranking for Ohio, Peer Agencies, and US Transit Agencies, 2008 & 2018 NTD

Figure 2-18: METRO, Peer and Ohio Transit Agency Trends in Salaries and Wages per Employee, 2008 & 2018 NTD

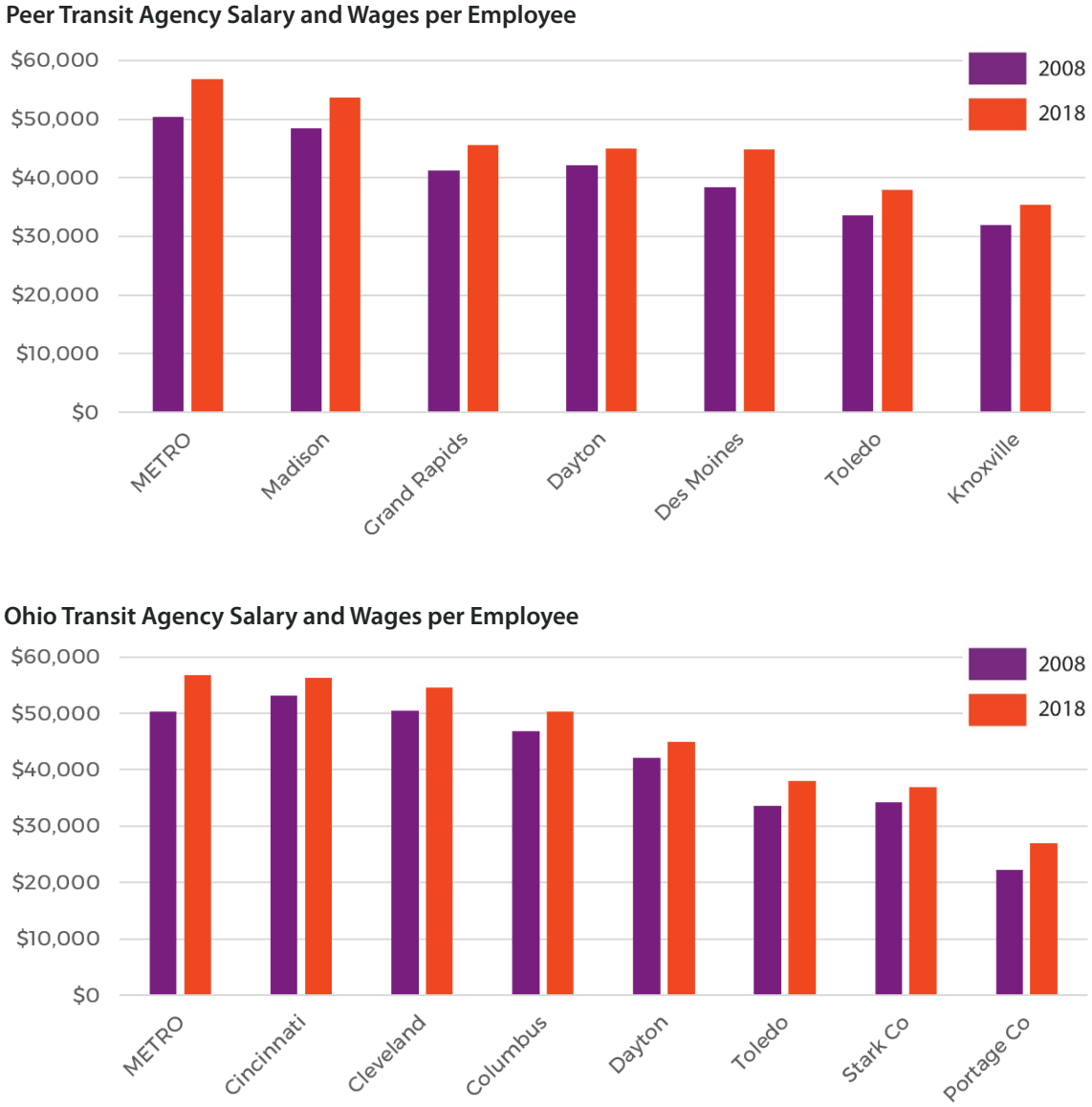


Figure 2-19: METRO 2018 Salaries and Wages per Employee Ranking for Ohio, Peer Agencies, and US Transit Agencies, 2008 & 2018 NTD

Figure 2-20: METRO, Peer and Ohio Transit Agency Trends in Fringe Benefits per Employee, 2008 & 2018 NTD

Figure 2-21: METRO 2018 Fringe Benefits per Employee Ranking for Ohio, Peer Agencies, and US Transit Agencies, 2008 & 2018 NTD

2.3 Revenues

Like many of Ohio's larger transit agencies, most of METRO's revenue comes from a county-wide sales tax. Shown in Figure 2-22 below, METRO's sales tax level is 0.5%, which increased from 0.25% in October 2008. In 2019, sales tax revenue accounted for 77% of METRO's total revenue. Much of the rest (almost 9%) came from various Federal grant programs. Revenue from passenger fares made up only 5.8% of METRO's revenue. 2.4% came from student fares assistance and various other sources such as interest gain. Grants from the State of Ohio were about 0.3% of METRO's revenue.

Figure 2-22: Annual Total Revenue Breakdown, 2019 CAFR

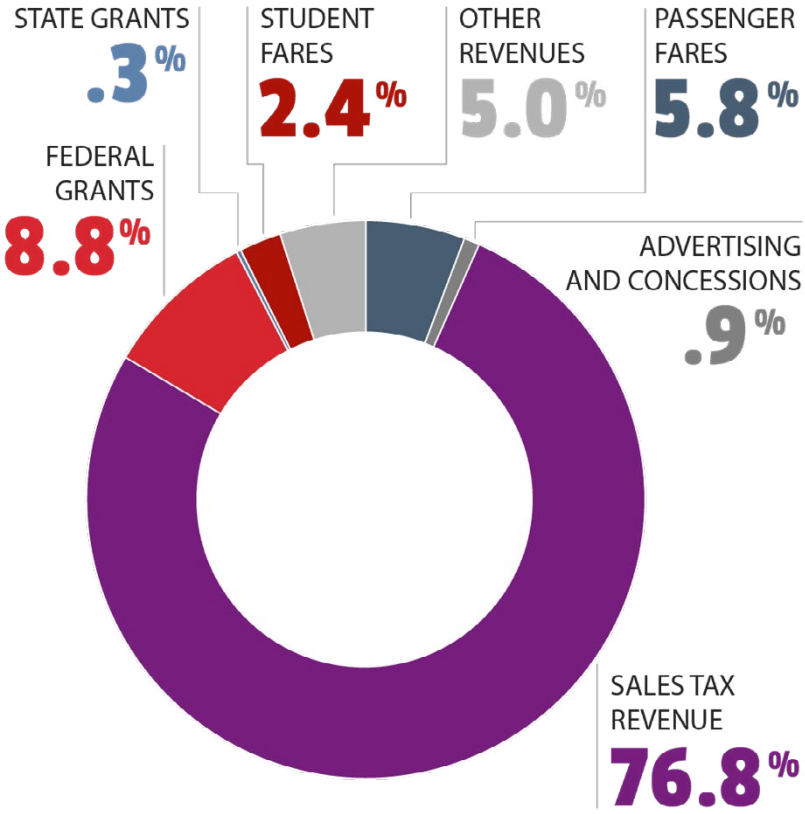


Figure 2-23 below shows METRO's revenue trend from 2012 to 2019. In 2019, METRO's total revenue from all sources was $61.6 million, which is nearly $6 million more than the 2014 level of $54.7 million, an increase of 13%. Revenues increased over the 2014-2018 period, reaching a peak of $62.6 million in 2018, before dipping back down to below $62 million in 2019. Fluctuations in Federal and local government grants as well as trends in sales tax revenues and other revenue sources explain these fluctuations over the last decade.

Figure 2-23: METRO Annual Total Revenue Trend, 2014-2019 CAFR

METRO's sales tax trends have been erratic in recent years. Sales tax revenues are volatile and uncertain by nature. Sales taxes closely follow regional and national economic cycles, and have been greatly effected in recent years by changing consumer behavior, like the increase in internet shopping and changing car buying habits.

Sales tax revenue slowly increased most years during the economic recovery period between 2014 and 2017, then drastically increased in 2018 to over $49 million and falling back down to mid $48 million in 2019 (Figure 2-24). The increase may have been based on good local and national economic conditions, as well as laws that enacted local governments to collect sales taxes on purchases by online sellers with no Ohio location, in effect in 2019. Revenues in 2020 have been higher than in 2019 during most months, despite the economic disruptions and unemployment caused by the COVID-19 pandemic. However, given the continuing threat of economic disruption due to the pandemic, as well as continuing changes to consumer spending, future growth is far from guaranteed, and future revenue levels remain uncertain.

Figure 2-24: METRO Sales Tax Revenue Trend, 2014-2019 CAFR

Continuing to increase operating expenses faster than revenues would eventually lead METRO to deplete its reserves, an option that is unsustainable.

METRO had $59 million in available funds (i.e. unobligated for federal funds, or uncommitted to any specific use) at the end of FY19. However, METRO does not maintain a dedicated capital reserve fund, to finance the local portion of vehicle replacement and facilities replacement and upgrade costs, or an operating reserve fund, to maintain service in the event of a loss of operating revenue. In such an event, without an operating reserve, METRO would have to reduce service levels, inconveniencing customers, reducing work hours, and ultimately reducing staffing levels.

Table 2-1: Reserves and Unspent Funds

Type of funds	Amount as of 2019 Closing
Federal funds unobligated balance	$5 m
Contingency Trust	$14 m
Capital Fund for Projects In-Progress	$12 m
Liquid Savings to be Obligated for Operating/ Capital Reserves	$16 m
Short-term investments (1-3 years)	$12 m
Total	$59 m

Notes:

Federal funds unobligated balance from FTA

Cash, liquid funds and short-term investments figures from unaudited end-of-year statements

2.4 State of the Agency

2.4.1 Organizational Structure

There are eight departments in METRO:

- **Safety & Protection**
- **Maintenance**
- **Employee Engagement**
- **Finance**
- **Operations**
- **Public Relations & Marketing**
- **Planning & Strategic Development**
- **Customer Care & Mobility Solutions**

Directors of each department reports directly to the Chief Executive Officer/Secretary-Treasurer, who in turn reports to METRO's 12-member Board of Trustees. Figure 2-25 on the next page shows METRO's organization structure.

A review of METRO's organizational structure and operations identified several potential issues:

METRO's current staffing and reporting arrangements in the area of technology may be inadequate to meet current and future agency needs. METRO's current team members dedicated to technology are situated in METRO's Finance department, with the Data Systems Manager supervising one data specialist and two hardware technicians, and reporting to the Director of Finance. Traditionally, this has been a typical approach to technology staffing but may not be the best approach to meet future needs. Given the current pace of technological innovations and integrations, these positions increasingly work with team members in other departments, including Maintenance, Public Relations and Marketing, and Planning and Strategic Development, who have responsibilities for managing data systems and equipment. Situating the technology function within Finance is an artifact of a time when team members in that department were the primary users of technology within the agency. Those days, of course, are long past.

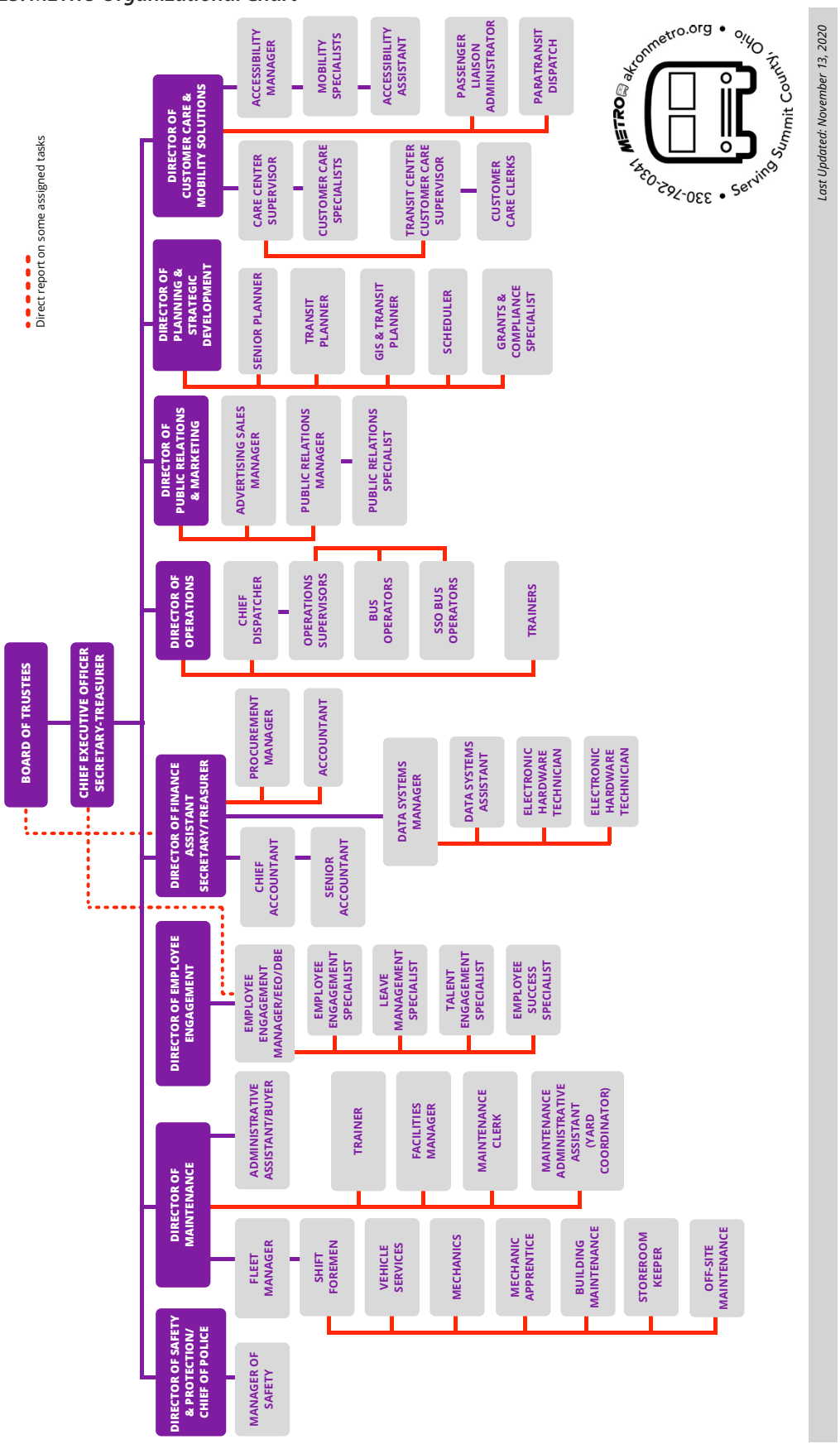
> Technology is now central to almost every function within the agency, and the responsibilities of the Data System Manager have expanded far beyond managing the office computer system, to encompass on-board data systems, web and app-based connectivity, customer information, vehicle scheduling, and many cross-departmental administrative functions.

In addition, there is an increasingly strategic element to technology. Agencies need dedicated team members to perform technological assessments, monitor the technological capabilities of team members operating and maintaining increasingly complex systems, identify new software and hardware systems, and implement new approaches to using technology to improve agency performance and efficiency.

METRO's operations and maintenance functions are divided, with separate department directors reporting to the Chief Executive Officer. This is not atypical, but many agencies are combining these closely related and interdependent functions into a single division under a director of transportation or chief operating officer who reports to the Chief Executive Officer.

As METRO takes on increasingly more complex and large-scale projects to meet current and future needs, the existing organizational structure lacks the necessary resources dedicated to program and project management. This encompasses all stages of project development including planning, funding, design, procurement, and construction. Large projects require careful coordination between departments to ensure all needs are met and operations are maintained during the project period. Insufficient resources to manage this process and mitigate project risk can lead to unforeseen delays and cost increases.

Figure 2-25: METRO Organizational Chart



2.4.2 Fleet

METRO maintains an active fleet of 232 revenue vehicles, 132 provide local fixed-route service, 8 motorcoach buses are used for express service, and 92 provide demand response services. In addition, METRO also maintains 24 non-revenue vehicles for support, maintenance, and supervising needs. Table 2-2 below shows the number of vehicles in METRO's active fleet by type of service, vehicle make and model, fuel type, and year of purchase.

More than half of the vehicles in METRO's revenue fleet are powered by Compressed Natural Gas (CNG) – 93 fixed-route buses and 31 demand response vehicles. The remaining revenue fleet is powered by diesel (8 motorcoaches, 35 fixed-route buses, and 61 demand response vehicles) and hybrid diesel-electric (4 fixed-route buses).

Table 2-3 lists METRO's vehicle purchases that are funded through 2024. METRO took delivery of seven large buses in 2019, and is scheduled to acquire 60 more buses for use on local routes, and to replace all eight motor coaches, by 2024. METRO acquired 35 demand response buses in 2019, and is scheduled to acquire 78 more by 2024. These purchases essentially would replace METRO's entire existing demand response and express bus fleets, and more than half of its local fixed route fleet, over the next five years, reducing the average age of the fleet and reducing maintenance costs.

METRO's Transit Asset Management (TAM) plan provides a schedule of planned annual bus replacements from 2016 through 2037 and is updated annually. The TAM plan's schedule of purchases, which shows a somewhat different schedule of annual purchases than shown in the (Akron Metropolitan Area Transportation Study) AMATS Transportation Improvement Plan (TIP) for the years 2019-2024, proposes purchase of 76 line service buses and 102 demand response buses between 2025 and 2030, and 70 line service and 102 demand response vehicles, as well as replacement of the commuter bus coach fleet, between 2031 and 2037. This schedule of purchases would maintain an acceptable state of good repair for a fleet as large, or slightly larger, than METRO's current fleet, through 2037.

METRO is also taking delivery of its first two battery electric buses, together with charging equipment, in 2022. Battery electric buses offer the potential to reduce pollution at the point of operation, reduce maintenance costs, and offer another energy source option in the event that costs of diesel or natural gas fuels should rise. However, battery electric buses now come at a significant purchase price premium over diesel, hybrid, or CNG vehicles, have a more limited range (miles per charge) and require expensive charging equipment. The market for battery electric buses is changing rapidly as battery and vehicle technologies improve, and could reach life-cycle cost parity during the life of the Strategic Plan.

Table 2-2: List of Active Vehicles

Service	Vehicle Model	Fuel Type	Purchased Year	Number of Vehicles
Demand Response	Ford CNG	CNG	2013	31
Demand Response	2014 Chevy Eldorado Scat	Diesel	2014	30
Demand Response	2015 Chevy Eldorado Scats	Diesel	2015	21
Demand Response	2019 Ford Transit	Diesel	2019	10
Express	45' Motorcoach Industries	Diesel	2001	2
Express	45' Motorcoach Industries	Diesel	2009	6

Table 2-2, Continued

Service	Vehicle Model	Fuel Type	Purchased Year	Number of Vehicles
Local Fixed-Route	35'Gillig Diesel	Diesel	2007	9
Local Fixed-Route	40' Gillig Diesel	Diesel	2009	4
Local Fixed-Route	40' Gillig Diesel	Diesel	2010	10
Local Fixed-Route	40' Gillig Hybrid Diesel	Hybrid Diesel	2010	1
Local Fixed-Route	35'Gillig Diesel	Diesel	2011	6
Local Fixed-Route	40' Gillig CNG	CNG	2011	2
Local Fixed-Route	40' Gillig CNG *ALTOONA BUS*	CNG	2011	1
Local Fixed-Route	40' Gillig Diesel	Diesel	2011	6
Local Fixed-Route	40' Gillig Hybrid Diesel	Hybrid Diesel	2011	3
Local Fixed-Route	40' Gillig CNG	CNG	2012	33
Local Fixed-Route	40' Gillig CNG	CNG	2013	10
Local Fixed-Route	60' New Flyer CNG	CNG	2013	6
Local Fixed-Route	40' Gillig CNG	CNG	2014	6
Local Fixed-Route	40' Gillig CNG	CNG	2015	8
Local Fixed-Route	35' Gillig CNG DASH	CNG	2016	8
Local Fixed-Route	40' Gillig CNG	CNG	2016	3
Local Fixed-Route	40' Gillig CNG	CNG	2017	8
Local Fixed-Route	40' Gillig CNG	CNG	2018	8

Table 2-3: METRO Vehicle Purchases included in AMATS TIP through 2024, AMATS 2019-2024 TIP

Fiscal Year	Small Buses (Demand Response)	Large Buses (40 Foot, Fixed Route)	Commuter Buses
2019	35	7	-
2020	10	10	-
2021	20	4	-
2022	20	11	2
2023	10	16 (3 CNG)	6
2024	18	19 (3 CNG)	-
Total	113	67 (6 CNG)	8

2.4.3 Property and Facilities

METRO owns and maintains eleven major facilities -- five maintenance facilities and one administration building (all co-located at 416 Kenmore Boulevard), three transit centers , and two park-and-ride facilities. Table 2-4 provides location information and METRO's condition assessment for each of the facilities. The condition assessment was done in METRO's Transit Asset Management (TAM) plan, which was based on FTA condition assessment criteria.

Table 2-4: List of Property and Facilities

Name	Address	Facility Type	Year Built or Reconstructed as New	Condition Assessment (5=Best)
Main Office/ Administration	416 Kenmore Boulevard, Akron, OH 44301	Combined Administrative and Maintenance Facility (describe in Notes)	1981	2
North Bus Barn		General Purpose Maintenance Facility/ Depot	2020 (expected by Dec. 2020)	5
South Bus Barn		General Purpose Maintenance Facility/ Depot	2017	5
East Bus Barn		Parking Structure	2017	5
Service Lanes		Vehicle Fueling Facility	2015	5
Public Use Natural Gas Station/Electric Charging Station	310 Kenmore Boulevard, Akron, OH 44301	Vehicle Fueling Facility	2017	5
Rolling Acres Transfer Station	2340 Romig Road, Akron, OH 44320	Bus Transfer Center	2002	3
Robert K Pfaff Intermodal Transit Facility	631 South Broadway Street, Akron, OH 44311	Bus Transfer Center	2009	4
Independence Bus Transfer Facility	1280 Independence Boulevard, Akron, OH 44310	Bus Transfer Center	2020 (expected by Dec. 2020)	5
James Fisher Park and Ride	465 Ghent Road, Akron, OH 44333	Surface Parking Lot	2010	3
Creekside Park and Ride	2600 Creekside Drive, Twinsburg, OH 44087	Bus Transfer Center	2002	3

METRO's TAM condition assessment gives a rating of 2 ("marginal") to METRO's Administrative building (built in 1981), and a rating of 3 ("adequate") to METRO's Rolling Acres Transit Center and METRO's Creekside Drive and James Fisher park-and-ride lots. Both the North Bus Barn and Independence Transit Center were rehabilitated and reconstructed, respectively, in 2020 with an expected project completion by the end of the year.

METRO's maintenance facility, which incorporates its administrative offices, is METRO's most pressing facility need. METRO commissioned an administrative facility needs assessment study in 2015. The

study found that METRO's existing administrative office facilities, at nearly 30,000 square feet, were inadequate to the space requirements at that time. The study also found that the facility, built in 1984, is outdated in design and showing signs of wear. Based on analysis and input from METRO administrative staff, the study estimated existing administrative space requirements to be around 48,000 square feet, an increase of more than 70%. According to the 2015 assessment, this additional space requirement could be met either by reconstruction or addition to the existing space.

The study identified a space shortfall of similar magnitude in METRO's existing bus maintenance and storage facilities. The study noted that these facilities are fundamentally inadequate to storing and maintaining the agency's current fleet of vehicles. METRO's existing facilities were sized to store and maintain 140 vehicles, including 90 35-foot fixed-route buses and 50 smaller demand response buses. METRO's current fleet of 240 vehicles is more than 70% larger than the original design capacity. Since the existing facility was designed, METRO's demand response fleet has doubled in size, and the agency now maintains 140 buses for fixed-route service alone. METRO's fixed-route fleet now is mostly made up of 40-foot buses, and includes eight 45-foot coach buses and six 60-foot articulated buses, further aggravating space constraints. Since completion of the 2015 study, METRO has developed plans and cost estimates for reconstruction of both the administrative and bus storage/maintenance facilities on its site on Kenmore Boulevard. The proposed phased plan would construct new facilities on currently unoccupied portions of the site before demolishing the existing facilities. The needs assessment and site plans assume that the office facility will be constructed at the Kenmore Boulevard site. The estimated cost for this plan is $18 million.

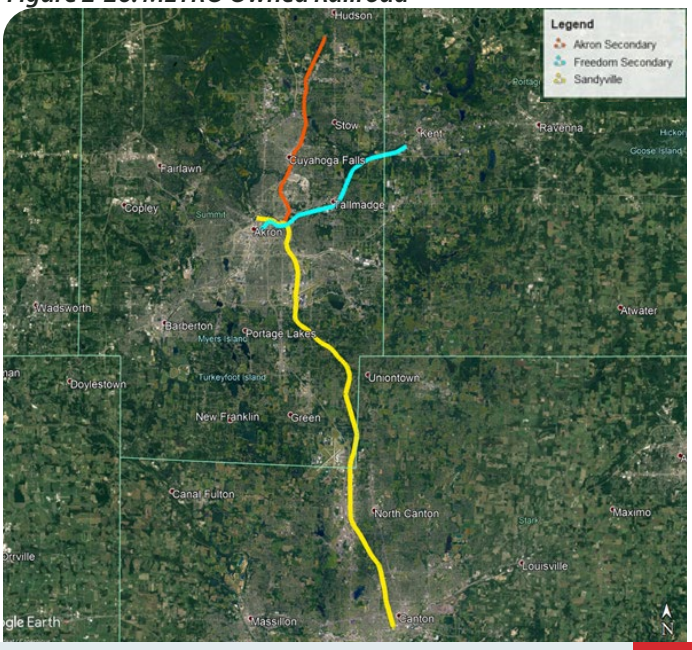
AMATS' TIP for FY 2019 and 2020 includes $6.5 million each year in local capital improvements on the rail lines and building improvements. The TIP also includes $303,000 for administrative building and transit center maintenance and rehabilitation in FY 2020, and $500,000 each year for building improvements in Fiscal Years 2021 through 2024.

Programmed improvements in the AMATS TIP at the bus passenger facilities are limited to a rehab of siding at RKP Transit Center and various concrete and paving work at multiple facilities in FY 2020.

METRO also maintains 84 bus shelters (according to the TAM plan) at high ridership bus stops throughout the network. The AMATS TIP includes more than $81,000 each year for FY 2019 and 2020, and $160,000 each year through 2024, for support equipment for bus shelters, benches, and signs, which should allow for maintenance and modest expansion of passenger waiting amenities throughout the system.

METRO also owns 43 miles of railroads. The Akron Secondary connects downtown Akron to just south of Hudson. The Freedom Secondary starts from just outside of downtown Akron through Tallmadge and extend into Portage County to the city center of Kent. The Sandyville connects downtown Akron to just west of downtown Canton. None of these railroads are in active use for passenger service. Much of the Freedom Secondary within Summit County has already been converted to a multi-use trail, and conversion of the remainder of that line is in progress. The Sandyville line is currently leased by two railroad operators to provide freight service for a few manufacturing companies along the line. The Akron Secondary line is currently inactive, although there is active interest in converting this line to a trail. For the most part, all of the METRO owned railroads avoid dense areas except in downtown Akron, which makes them less than ideal for implementing passenger service. While METRO collects a modest amount of income on the rail lines from trackage fees, utility license fees and stone hauling fees, the 2017 METRO Rail Asset Management Report projected net losses of over $250,000 per year to maintain ownership of the lines under current agreements. Costs include track and signal inspections, as well as crossing, track and signal repairs. To help further offset these recurring costs, METRO hired a railroad project management consultant in 2019 to pursue licenses and collect fees on undocumented utility crossings along all three lines. This resulted in an uptick in railroad related income, however projected net costs for 2020 remain around $90,000. Figure 2-26 below shows the alignments of these METRO owned railroads.

Figure 2-26: METRO Owned Railroad



2.4.4 Technology

Table 2-5 below shows the hardware and software METRO has deployed for fare collection, scheduling, dispatching, scheduling adherence, vehicle locating, and passenger counting. METRO is also in the process of updating farebox to GFI Odyssey 3.0.

Table 2-5: List of Hardware and Software

Technology	Vendor	Hardware	Software
Farebox	GFI	Odyssey	v2.05
Scheduling Software	GIRO	-	HASTUS 2019
Dispatch Software - Fixed-Route	Avail	-	MyAvail 7.0.0.6
Dispatch Software - Demand Response	Ecolane	-	Ecolane 4.7.1
Timekeeping	Avail	-	Fleetnet 09.06
Automated Vehicle Location (AVL) System	Avail	Mslate & Vector 9000	MyAvail 7.0.0.6
Automated Passenger Counter (APC) System	Avail	InfoDev	-

METRO uses industry standard hardware and software systems for its farebox and fare collection, fixed-route and demand response scheduling, dispatching, on-board vehicle location and passenger counting systems.

METRO's use of the data generated by these systems, and their integration into systems for day-to-day management and to evaluate performance to support longer term planning and development, could be improved.

Additionally, there is room for improvement to the functionality and integration of the timekeeping, payroll and accounting systems. Identifying cross-departmental efficiencies is a clear opportunity for METRO moving forward.

2.5 Gaps and Opportunities

As noted at the beginning of this chapter, METRO's recent trends of declining ridership, increasing operating costs, and volatile and uncertain sales tax revenues, are not sustainable. These trends are likely to be further cemented by both the short-and long-term impacts of the COVID-19 crisis, and by regional and national socio-economic trends over which METRO has no influence.

The evaluation of METRO's operations and administration identified several gaps, some of which contribute to the cost and revenue gaps. The productivity of METRO's fixed-route network is low and declining, in part because of alignment and schedule elements that violate route design best practices, and poor on-time performance and overcrowding on some key routes.

METRO's demand response services, in contrast, are over-subscribed, in large part because lax eligibility criteria and low fares on METRO's SCAT service encourage non-disabled older people to use SCAT in preference to METRO's fixed-routes.

Organizationally, METRO's financial system lacks capital and operating reserve funds to ensure that funds are available to finance ongoing operations, replacements and upgrades to fleet and facilities, and development of new infrastructure to improve operations and passenger amenities. METRO's administrative staffing places insufficient emphasis on the role of technology in improving agency performance, both now, and in the future. METRO also has inadequate staff resources in the areas of project and construction management to coordinate multiple major project simultaneously. METRO's most pressing facility issue is the replacement of its maintenance/storage and administrative office facilities, both of which are over capacity and overdue for replacement. These projects must account for the potential development opportunities they raise, as well as the significant challenges of funding and executing the massive projects that will be required to replace the facilities. METRO's key technological resources are up-to-date, but further coordination of services will be required for METRO to make full use of its technological resources as effective management, evaluation, and planning tools.

Figure 2-27:

State of the System - Gaps

1. Rising costs and uncertain revenues
2. Need for dedicated capital and operating reserves
3. Declining fixed-route productivity
4. Low ridership on some routes in lower-density areas
5. Ridership exceeds capacity at peak times on some routes
6. Increased desire and/or need for demand response service
7. Technology is not an integrated organizational priority
8. Need for additional resources to manage simultaneous major projects
9. Existing maintenance and administrative facilities are too small to meet present needs

3. Market Analysis

The market analysis reviews recent and projected population, employment, economic, and demographic trends in METRO's service area, and their likely impact on transit use in Summit County.

The analysis documents development and land use patterns throughout the county, and how these patterns challenge METRO's ability to efficiently serve the study area. Finally, the analysis examines METRO's place within the larger transportation network that includes regional vehicular traffic, bicycle and pedestrian networks, and parking, and the challenges and opportunities that these modes provide to METRO.

Analyzing how METRO's service matches the needs and opportunities of its markets is the fundamental answer to the first in the series of questions that this Strategic Plan seeks to answer: where are we now?

Together with the analysis of the State of the System, and the input gathered in the surveys and outreach activities documented in the next chapter, the market analysis also begins to answer the second question: how do we get there?

3.1 Population

METRO's service area population last increased between 1990 and 2000, when it increased by 5.4%, from 515,000 to 543,000. This growth was concentrated in the growing suburbs of the county, and was the result of outward movement of people (and jobs) from Akron and from Cleveland and its Cuyahoga County suburbs. Since 2000, the county's population has not grown and, in fact, has declined slightly (by about 1,600 persons, less than 0.3%) since 2000. The county's average population density is very low at just over two persons per acre. By comparison, Cuyahoga County's average population density, despite years of losing population to nearby counties and other regions, was more than double that of Summit County, at 4.2 persons per acre in 2018.

Table 3-1: Population in Summit County, 1990-2010 Decennial Census, 2018 American Community Survey (ACS)

	1990	2000	2010	2018
Population	514,990	542,899	541,781	541,810
Population Density	1.95	2.05	2.05	2.05

Population projections by the Ohio Development Services Agency (ODSA) estimate that Summit County's population will slightly decrease by 1.0% to 529,000 residents by 2030, and decrease by another 1.9% to 522,000 residents by 2050. By contrast, the State of Ohio's population is forecast to increase by 0.3%, to 11.62 million by 2030, and another 2.6%, to 11.65 million by 2050.

The average age of Summit County residents is increasing, and is slightly higher than both the State of Ohio and US average. In 2018, the median age of Summit County residents was 40.9 years old – an increase from 39.5 years in 2010 and 37.4 years in 2000. By comparison, the median age of Ohio residents in 2018 was 39.3 and for US residents as a whole was 37.9 years.

According to ODSA projections, between 2020 and 2030, the number of people aged 50-70 years in Summit County will decrease dramatically (Figure 3-1). The number people in the 70+ age groups will also increase significantly, while the number of young and middle-aged people (30-50 years of age) will increase slightly. Between 2020 and 2050, the number of people in the 80+ age group will continue to increase as residents choose to retire and age in place (Figure 3-2). These changes indicate potential for future increases in demand for fixed-route service but especially for demand response service in the long term as the number of retirees and elderly residents that choose to stay in Summit County grows.

Figure 3-1: Population Pyramid Projections between 2020 and 2030, Ohio Development Services Agency

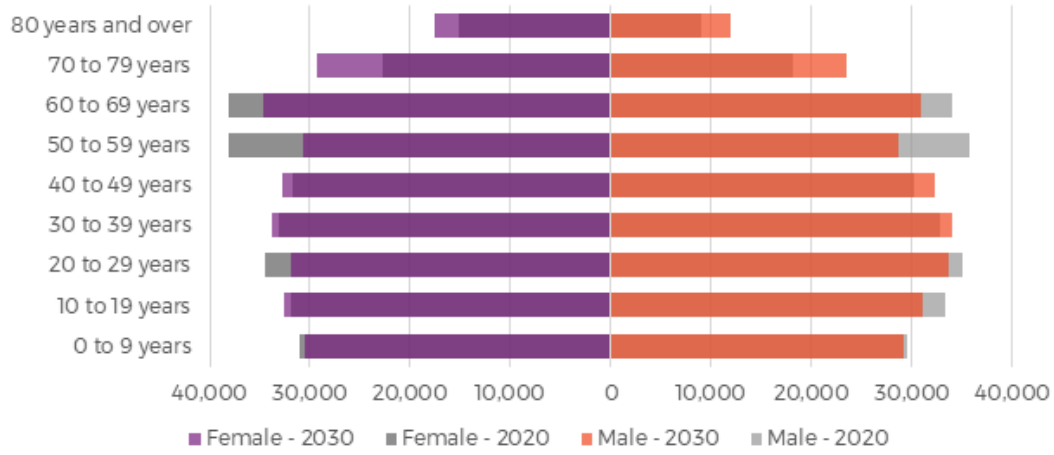
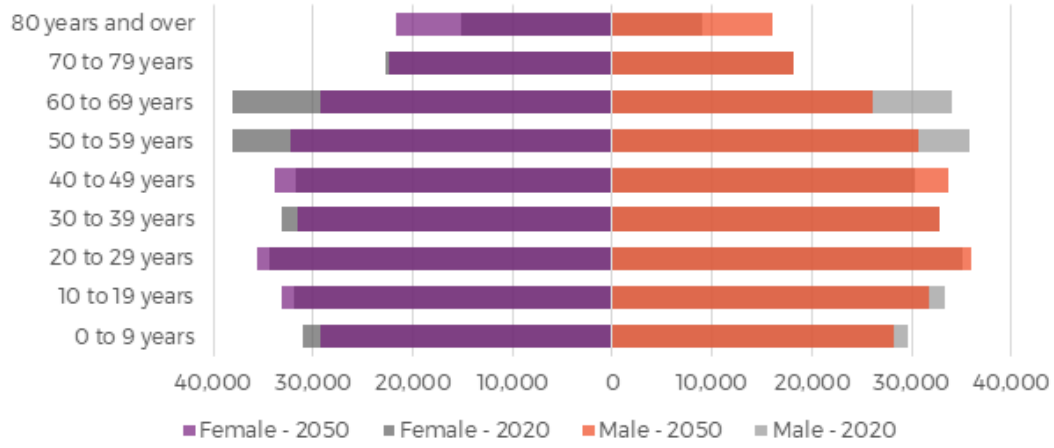


Figure 3-2: Population Pyramid Projections between 2020 and 2050, Ohio Development Services Agency



Since 1990, Summit County's population has shifted geographically. In general, Akron neighborhoods and older suburban areas lost population, while lower-density areas gained population. Downtown Akron and portions of south and west Akron have gained population, while some suburban and rural areas have seen population loss.

Figure 3-7 highlights the magnitude of the intra-county shifts in population recorded between 1990 and 2018. While many block groups in Akron and its suburbs experienced a population loss of more than 10%, many peripheral areas of the county experienced an equal or higher percentage population increase that offset the losses experienced in Akron.

The City of Akron is the largest and most densely populated city in Summit County. Between 1990 and 2018, the city lost nearly 23,500 residents, mostly from neighborhoods surrounding downtown Akron. The shift of population from Akron into the neighboring communities can be seen in the changes in population density between 1990 and 2018 (Figure 3-3 through 3-6). The number of block groups reporting medium and high population densities (15.1 persons per acre or more) decreased as they transitioned to lower population densities (5.1 persons per acre or less) by 2018. This is most evident in the areas south of downtown Akron and along West Market Street.

Despite this trend, the 2010s saw increasing numbers of millennials, young professionals, and new retirees across the country choosing to live in more walkable communities with urban amenities. This trend is evident in Akron in the handful of block groups in downtown Akron, South Akron and along Market Street that saw their populations and population densities increase between 2010 and 2018. This trend is still in its infancy in Akron, and may be influenced by the long-term effects of the COVID-19 pandemic. However, the resumption of this trend after the pandemic would be a positive development for the future of METRO, and for Akron and its older suburbs.

Figure 3-3: Population Density by Census Block Group in Summit County, 1990 Decennial Census

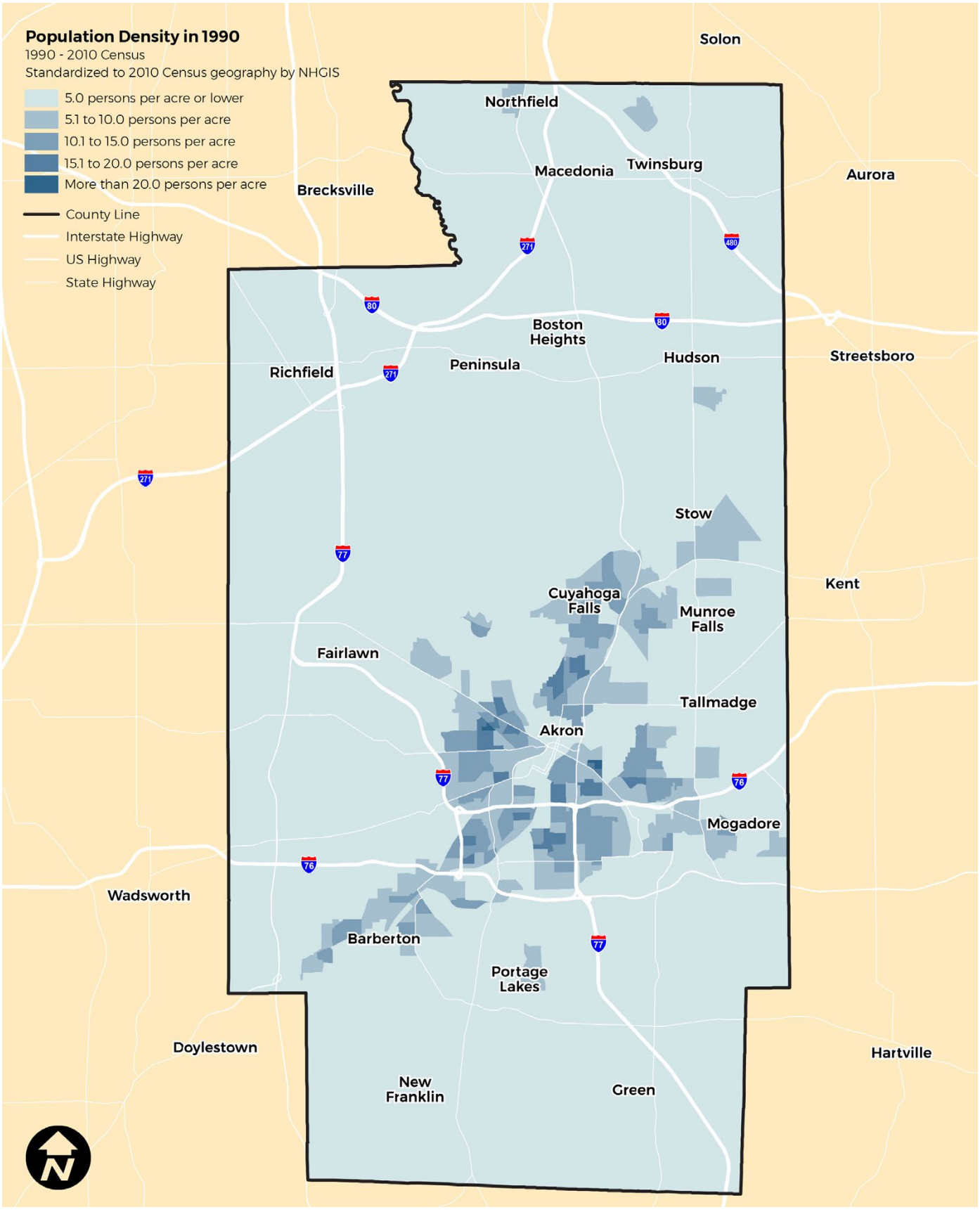


Figure 3-4: Population Density by Census Block Group in Summit County, 2000 Decennial Census

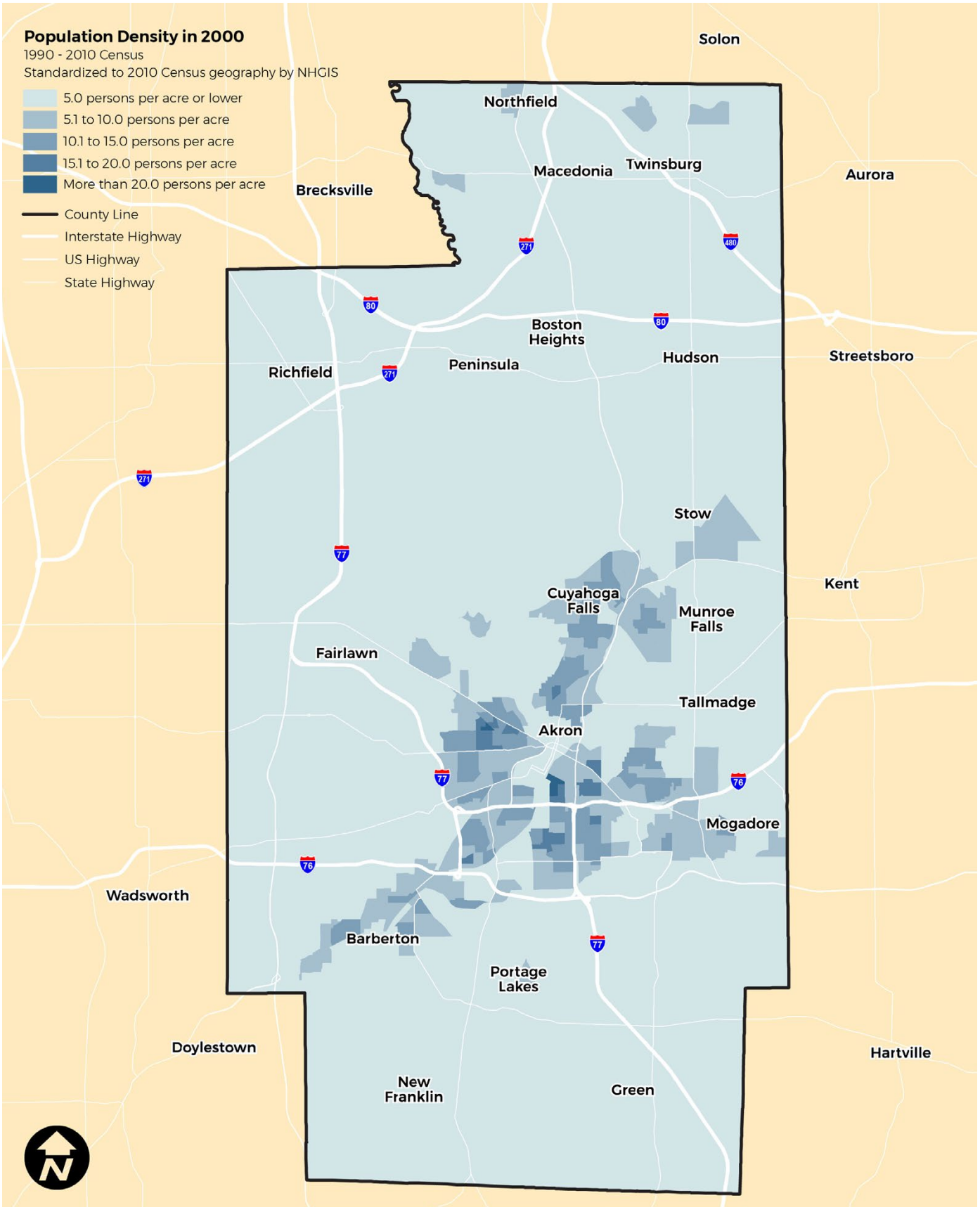


Figure 3-5: Population Density by Census Block Group in Summit County, 2010 Decennial Census

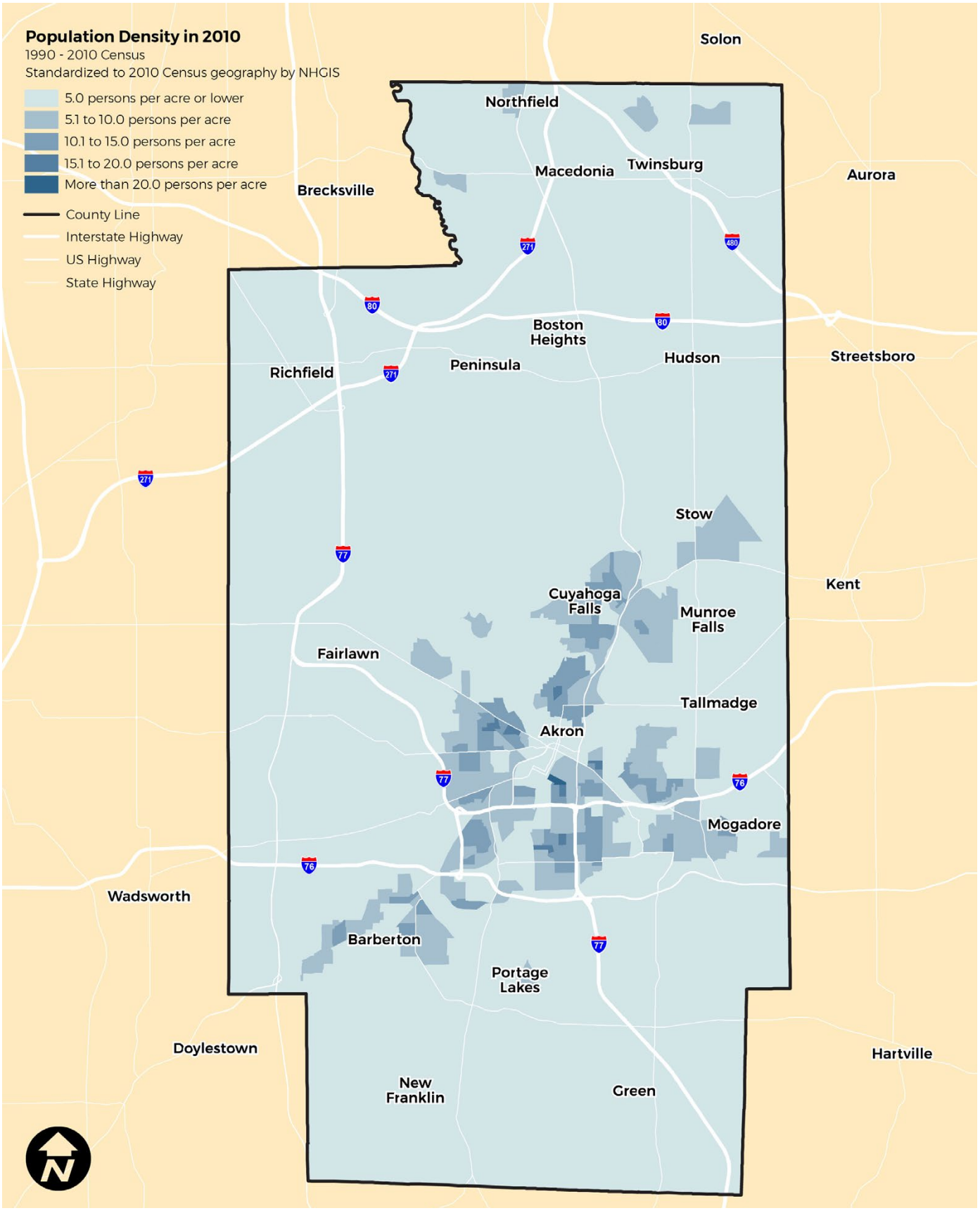


Figure 3-6: Population Density by Census Block Group in Summit County, 2018 ACS

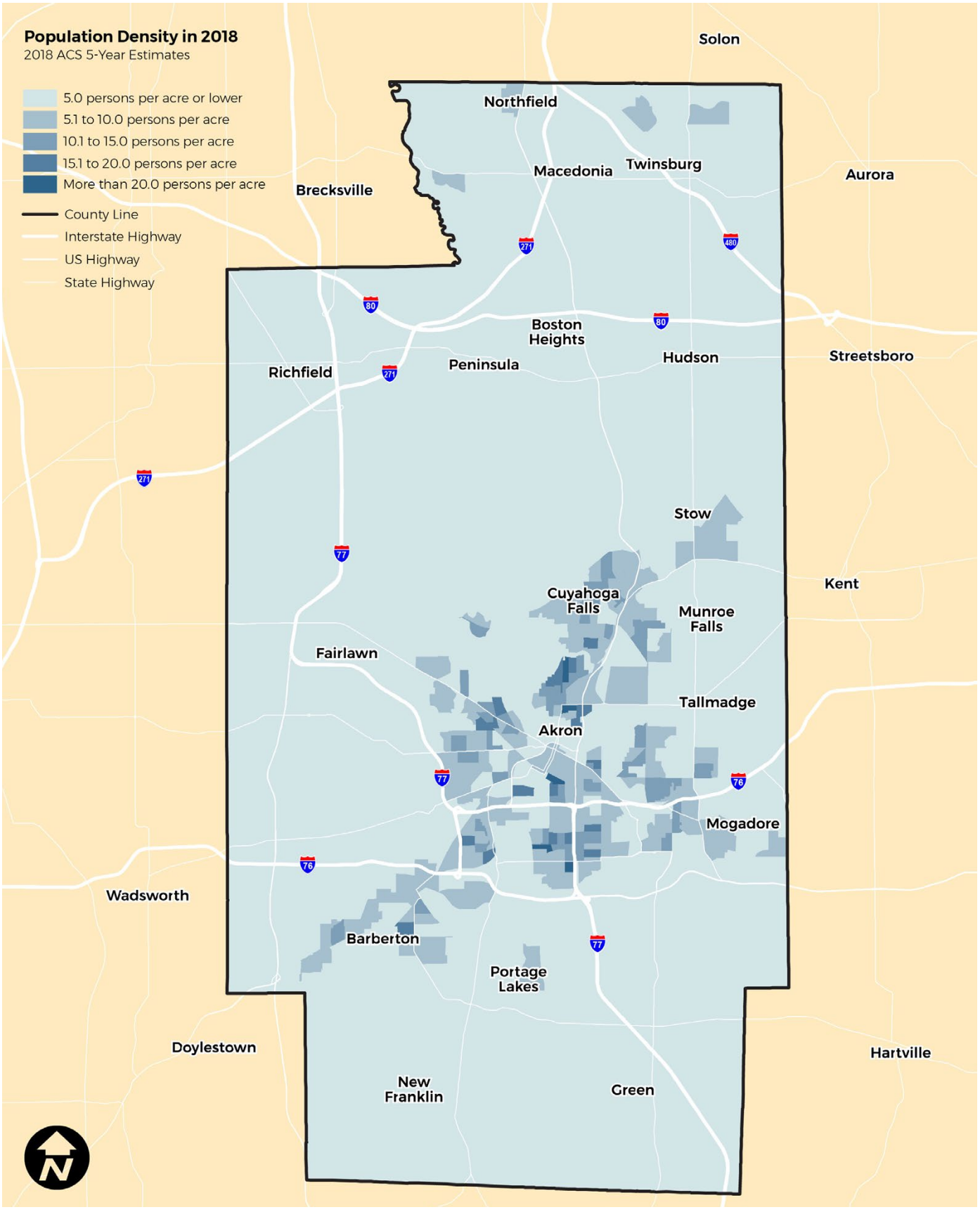
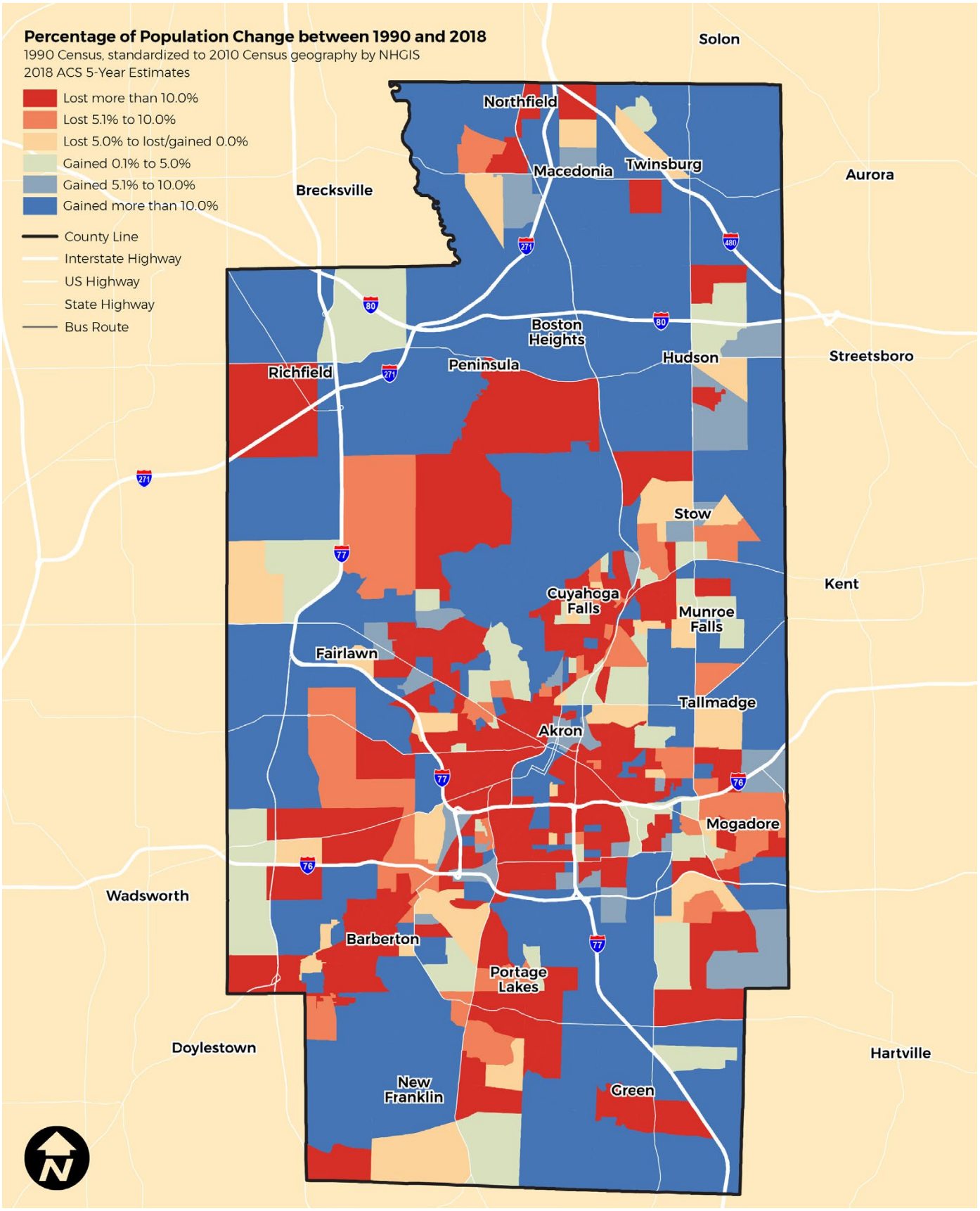


Figure 3-7: Percentage of Population Change by Census Block Group between 1990 and 2018, 1990 Decennial Census, 2018 ACS



3.1.1 Senior Population

Between 2013 and 2018, the Summit County senior population (people aged 65 and older) made up 16.6% of total county population. There are high concentrations of senior residents (at least 30% of the population) in Fairlawn north of West Market Street and close to I-77, Barberton, northern Akron, Cuyahoga Falls, and Twinsburg (Figure 3-8). The lowest concentrations of senior residents are in and around downtown Akron where population density in general was reported to be low to medium density. This area, except for the core of downtown Akron, also reported some of the highest population losses between 1990 and 2018 suggesting that older adults and seniors were involved in the intra-county movement.

As mentioned earlier in this chapter, Summit County's senior population is projected to grow over the next ten years. This growth will increase the number of people eligible for METRO's SCAT service, which could result in more demand for that service.

METRO's SCAT and ADA services are the transportation lifeline for thousands of disabled and older residents, who use them for medical appointments, shopping, work, education, and other critical travel. However, as noted in Chapter 2, demand for these services challenges METRO's capacity to provide them. Over the next ten years, METRO will face significant challenges in meeting growing demand without program changes, additional resources, or both.

3.1.2 Population with Disabilities

According to 2018 ACS, 19.9% of Summit County's population was reported to have at least one disability. This subset of the population tends to rely on transit to fulfill their transportation needs. Many people's disabilities prohibit them from operating a personal vehicle, or they may be unable to afford vehicles modified to accommodate their disabilities. The highest concentrations of disabled persons were reported in block groups located in the inner ring suburbs of Akron and south of Barberton where more than 40% of the population had at least one disability (Figure 3-9). Other concentrations of block groups with higher percentages of disabled persons were in Fairlawn, Macedonia, and south of Twinsburg where 30 to 40% of the population reported at least one disability.

Figure 3-8: Percentage of Senior Population by Census Block Group in Summit County, 2018 ACS

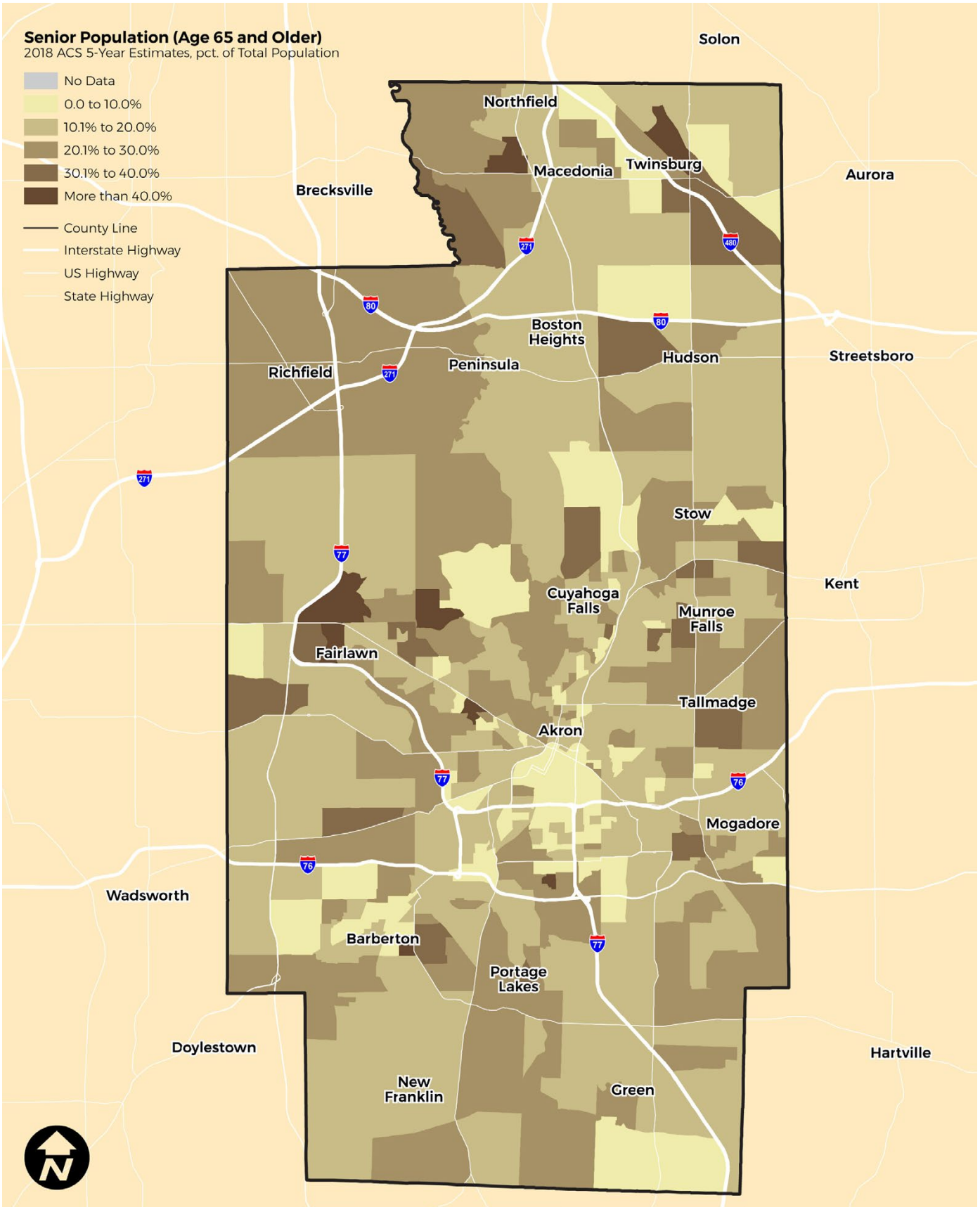
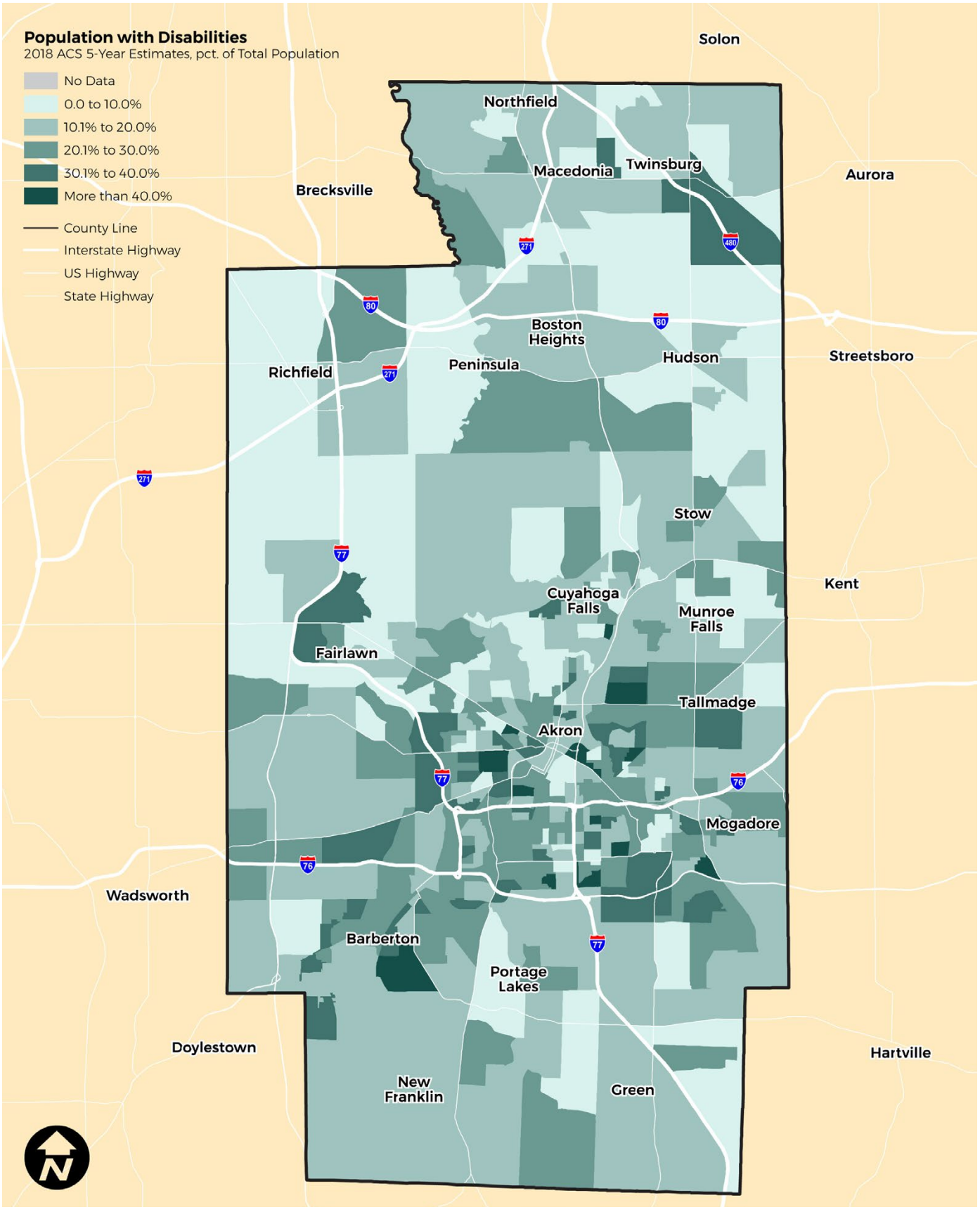


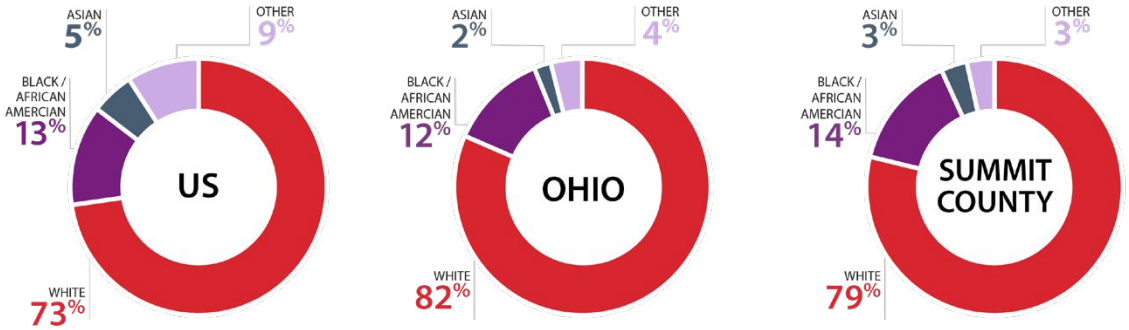
Figure 3-9: Percentage of Population with Disabilities by Census Block Group in Summit County, 2018 ACS



3.1.3 Race and Ethnicities

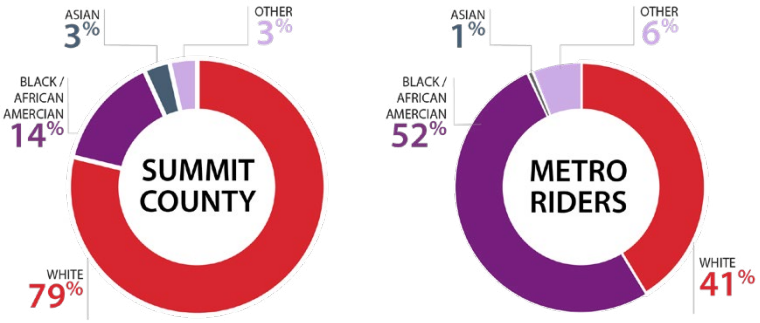
Shown in Figure 3-10 below, in 2018, most Summit County residents identified as white only (79%). Those that identify as Black or African American made up 14% of the population, followed by Asians and people who identified with two or more races at around 3% each. Hispanics, of all races, made up 2% of the population.

Figure 3-10: Percentage of Population by Race in US, Ohio, and Summit County, 2018 ACS



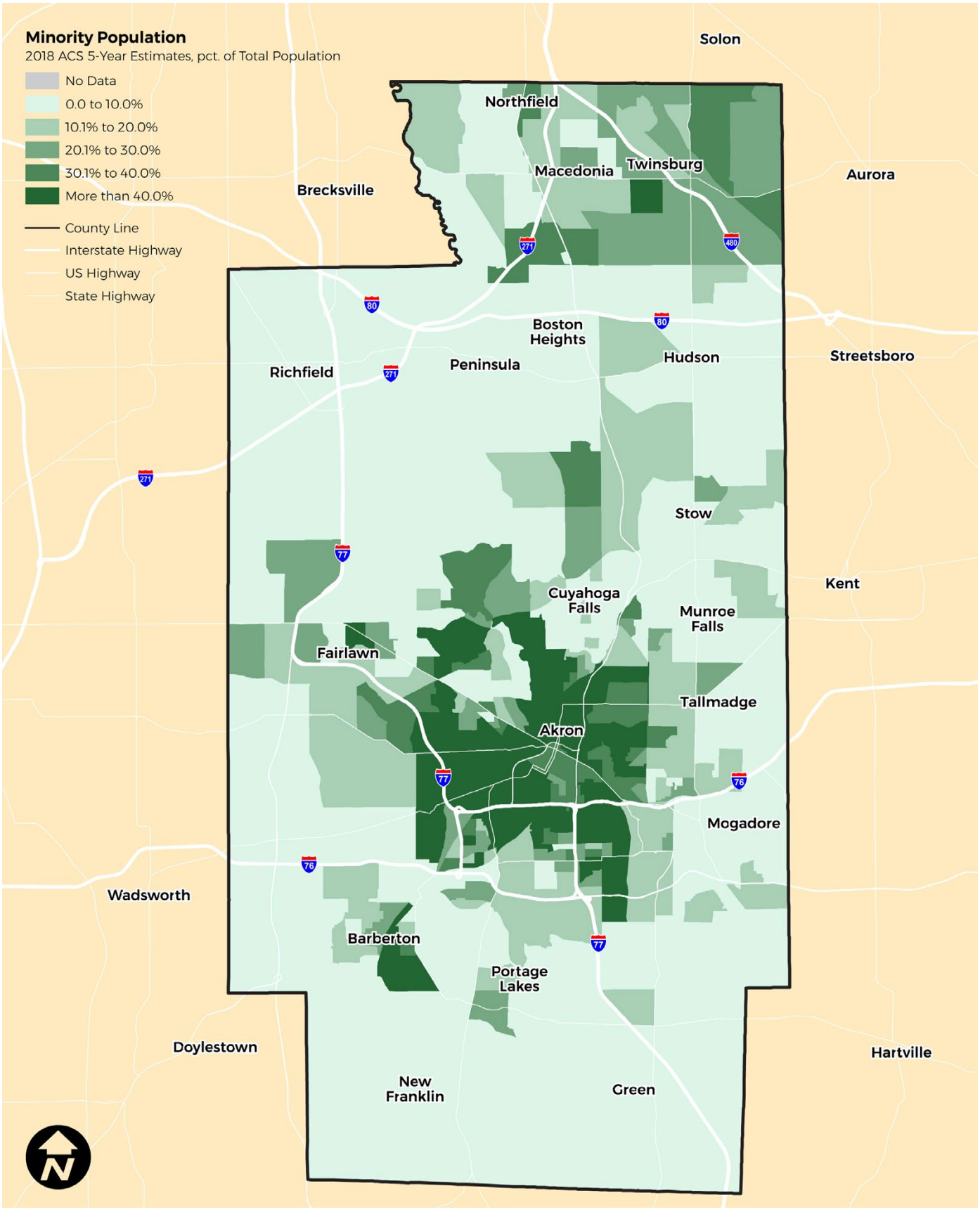
Summit County's proportion of minorities in the population is lower than the US average. The percentage of African Americans, and Asians is slightly lower in Summit County than the US average, while the percentage of Americans of Hispanic descent is much lower. According to ACS, 20% of US population identified themselves as Hispanic or Latino in 2018. Hispanics made up 4% of the Ohio population, and just over 2% of the Summit County population. Both African Americans and Hispanic Americans tend to use public transit at higher rates than Americans who identify as white. On the on-board survey of METRO fixed-route riders that was conducted for this project, more than half of METRO riders identified as Black or African American. Responses to the racial identify survey question are shown in Figure 3-11; the survey results are discussed further in Chapter 4, and full results are provided in Appendix 2.

Figure 3-11: Percentage of Summit County Population and METRO Riders by Race, 2018 ACS, 2020 METRO On-Board Survey



Most places where minorities made up more than 40% of the population are in the City of Akron, with isolated concentrations in Barberton, Fairlawn, and Twinsburg. Minorities make up more than 10% of the population in many suburban areas adjacent to Akron, and in much of the northern tier of Summit County north of the Cuyahoga Valley National Park (Figure 3-12).

Figure 3-12: Percentage of Minority Population in Summit County, 2018 ACS



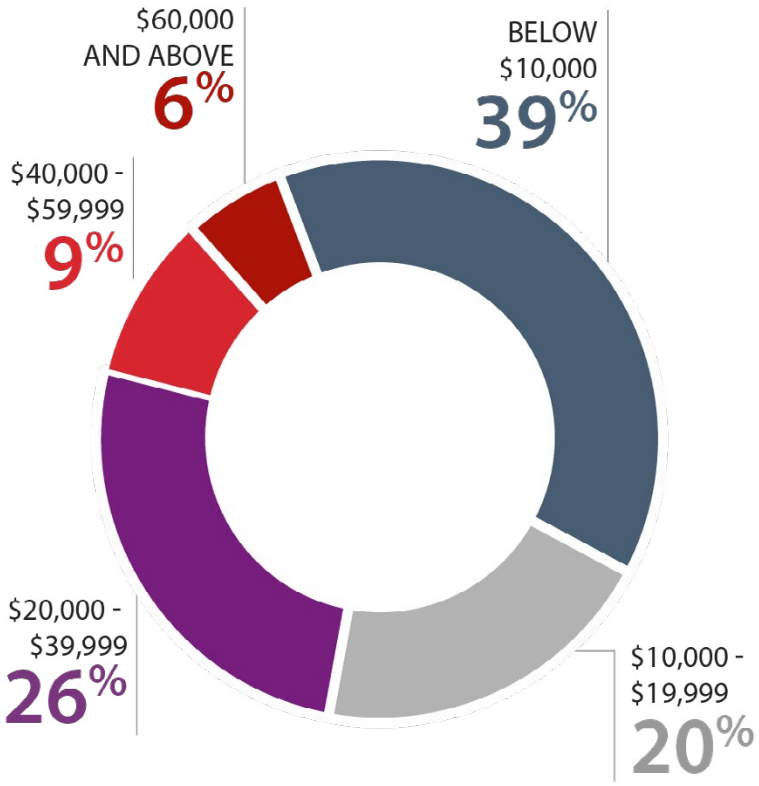
3.1.4 Income and Poverty

The federal government set the poverty threshold at an annual income of $13,064[1] , for a one-person household, $20,212 for a two-person household with one child, and $29,967 for a five-person household with three children. The income categories used on the on-board survey did not correspond to poverty thresholds; however, 39% of riders indicated that their total annual household income is less than $10,000 – well below even the lowest federal poverty threshold (Figure 3-13). About 85% indicated incomes below $40,000.

In 2018, about 13% of Summit County residents had incomes below the Federal Poverty threshold. Figure 3-14 shows the distribution of these people in 2018. Figure 3-15 shows the median household income between 2013 and 2018, in Summit County by block group. By comparing both maps, we can see that the City of Akron had the highest concentration of low-income households and some of the lowest median incomes in the county with many households reporting an annual household income of less than $40,000. Most of the higher median income block groups were located in the northern parts of Summit County, away from densely populated areas. These areas included Hudson, Boston Heights, and Richfield with reported annual median household incomes of more than $100,000.

This suggests that METRO riders, on average, have significantly lower incomes than the average Summit County resident, and many live below the poverty line.

Figure 3-13: Reported Household Income from METRO Riders, 2020 METRO On-Board Survey



[1] A detailed Federal Poverty Threshold by size of family and number of children can be found on US Census: https://www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html

Figure 3-14: Percentage of Population Living below Federal Poverty Threshold in Summit County, 2018 ACS

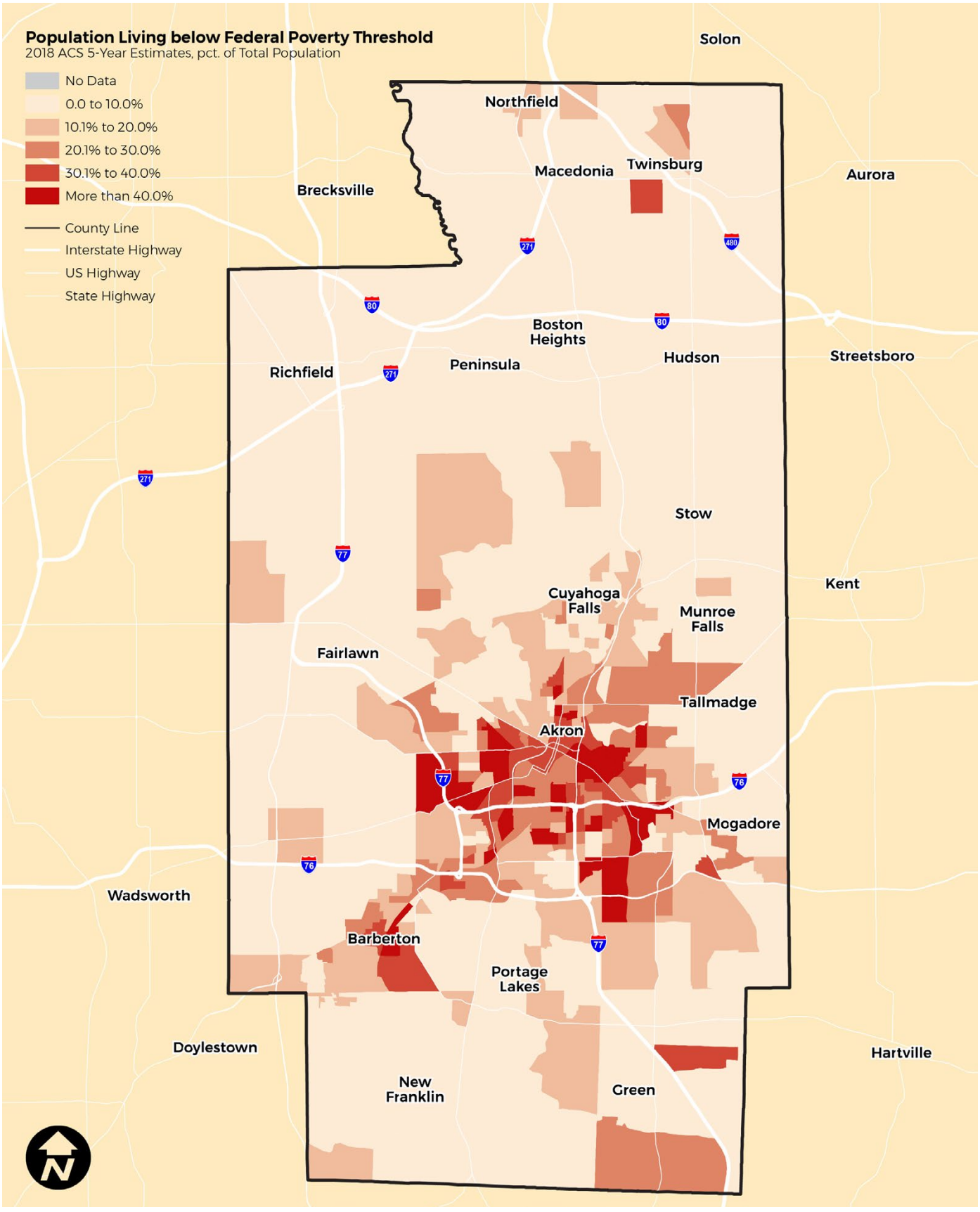
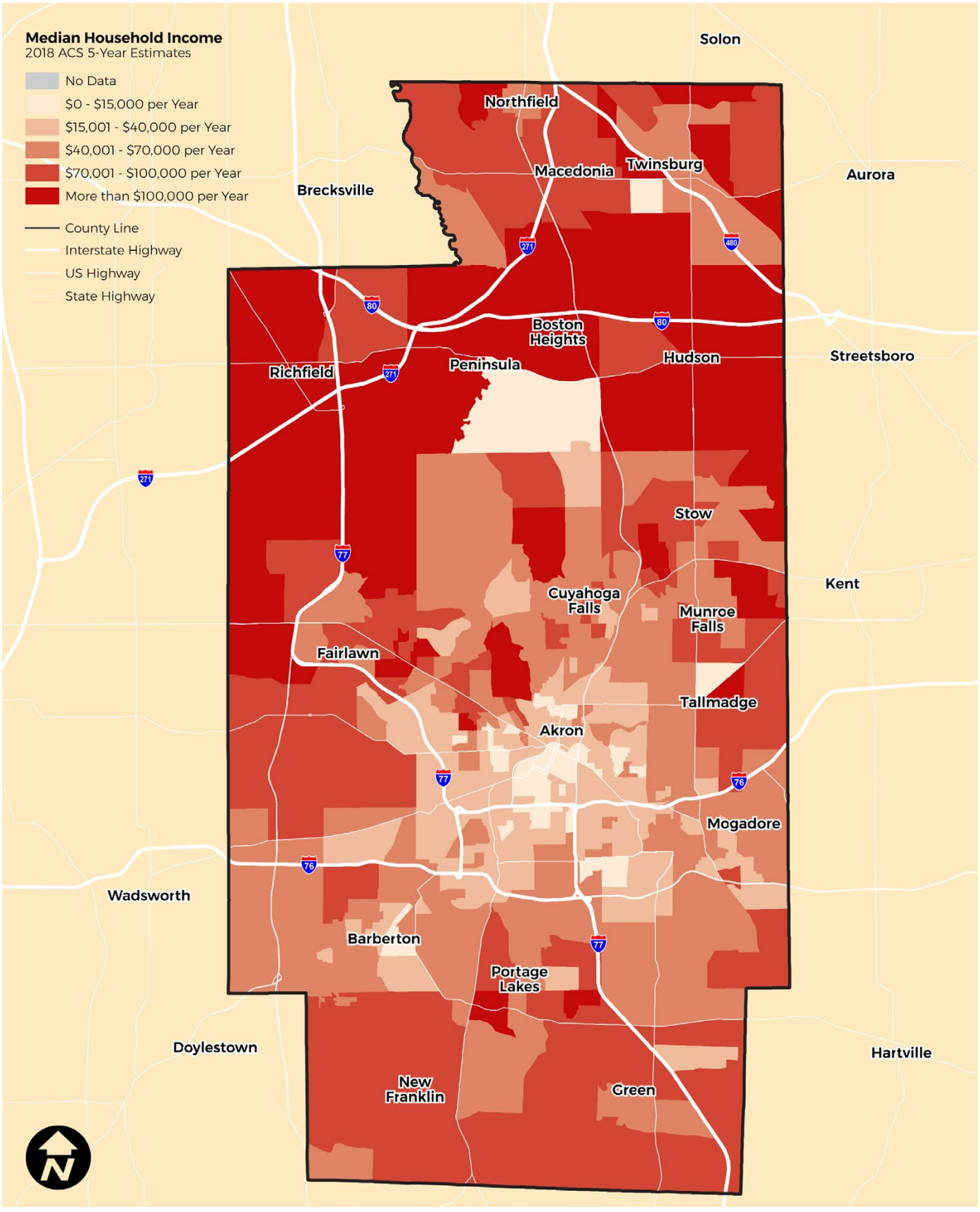


Figure 3-15: Median Household Income in Summit County, 2018 ACS



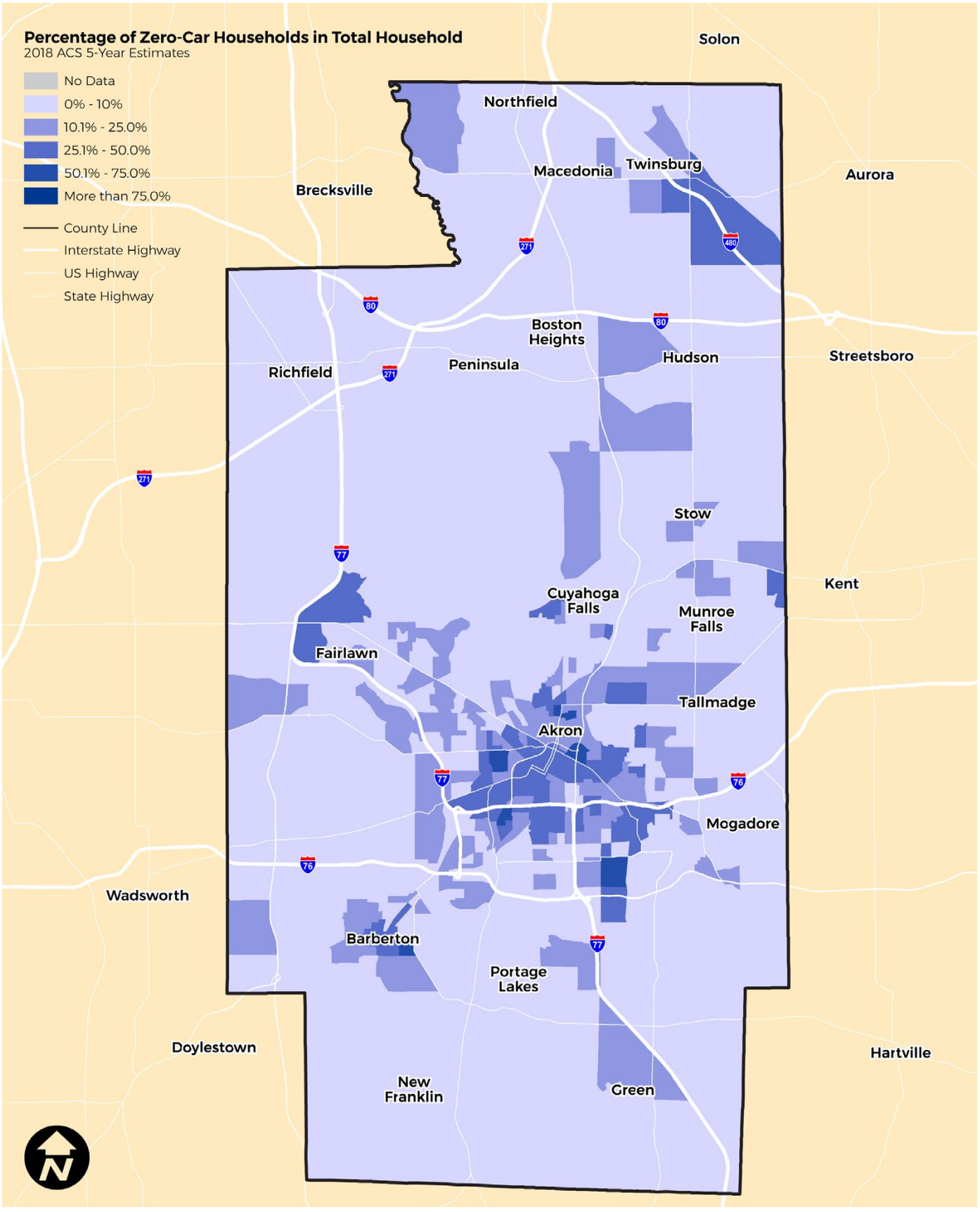
3.1.5 Access To Personal Vehicles

People without access to personal vehicles are more likely to use public transit to meet their transportation needs than those who own or have reliable access to a car. This is reflected in the on-board survey results, which indicate that 72% of the respondents have access to a personal vehicle, and 67% of do not have a driver's license. The largest concentration of households that do not have access to a car (zero-car households) is south and west of downtown Akron. Block groups in these areas report more than 50% of households do not have access to a car (Figure 3-16).

Outside of Akron, the suburbs of Barberton, Fairlawn, Twinsburg, and Cuyahoga Falls all report block groups where between 25% and 50% of households have no access to a car.

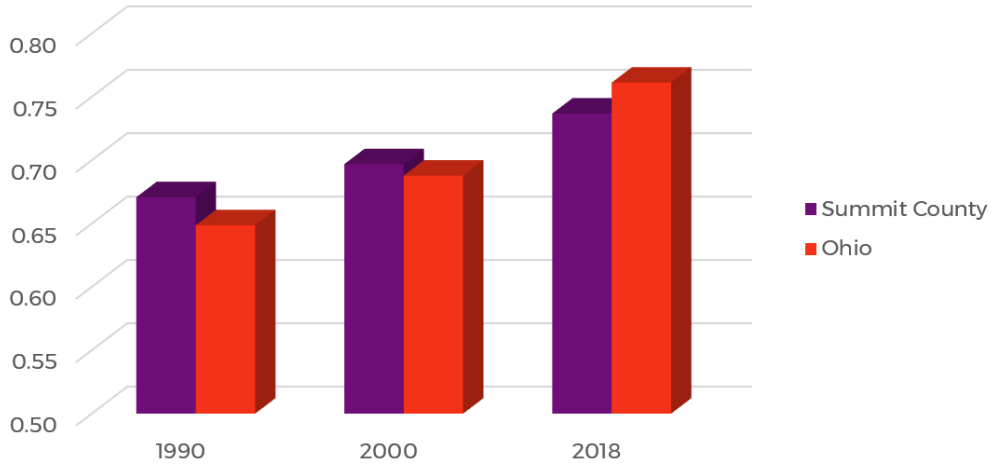
The smaller towns and suburbs of Macedonia, Stow, and Green all report block groups where 10 to 25% of households do not have regular access to a car. The remaining rural areas or more affluent parts of the county report low percentages of zero-car households, ranging between 0 and 10% of all households in the block group.

Figure 3-16: Percentage of Zero-Car Households in Total Occupied Household in Summit County, 2018 ACS



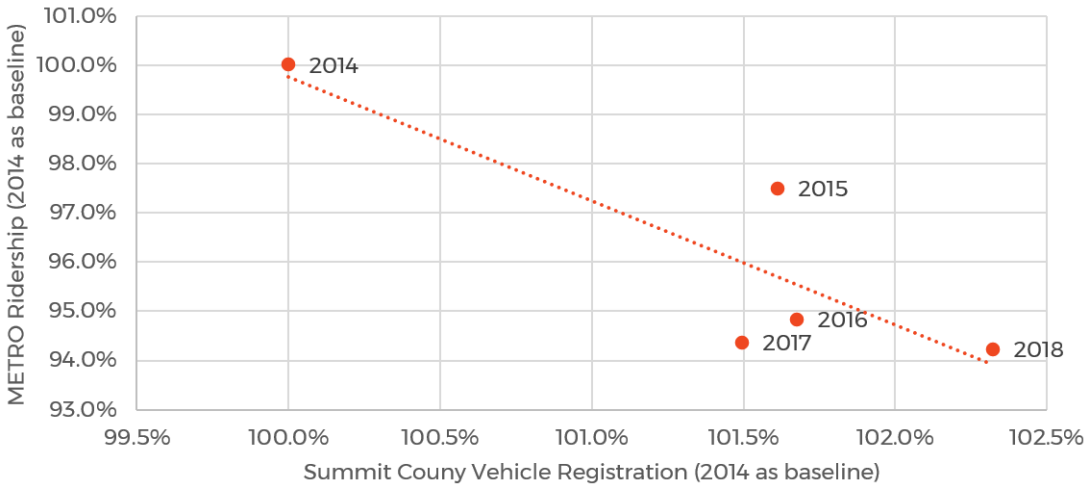
Historically, vehicle ownership rates in Summit County have slightly exceeded the rate for the State of Ohio in both 1990 (0.67 vs 0.65 vehicles per person) and 2000 (0.70 vs 0.69 vehicles per person) (Figure 3-17). Vehicle ownership continued to grow in Summit County leading up to 2018 but at a slower rate and, for the first time in over 20 years, was outpaced by the State of Ohio as a whole – 0.74 vs 0.76 vehicles per person, respectively. This slowing of the vehicle ownership rate in Summit County may partially explain why METRO's ridership declines in the 2010s were not as drastic as those observed at other transit agencies throughout Ohio and the US.

Figure 3-17: Vehicles per Person, Summit County and State of Ohio, 1990-2018



A comprehensive study[2] conducted by Southern California Association of Governments (SCAG) indicated that the rise in vehicle ownership, especially among lower income households, was the cause in the decline in transit ridership in southern California. Using the same methodology as the SCAG study, the graph in Figure 3-18 compares the increase in vehicle registrations, and the decrease in transit ridership, for Summit County since 2014. While there were not enough samples available to make the correlation statistically significant (vehicle registration data for Summit County is available only to 2014), there is a clear correlation between the rising auto registration rates and falling transit ridership. Correlation does not prove causation, but it is reasonable to assume that rising vehicle ownership is a factor in the ridership decline experienced by METRO's fixed-route system since 2014.

Figure 3-18: Summit County Vehicle Registration and METRO Ridership, 2014-2018 Ohio Bureau of Motor Vehicles, 2014-2018 NTD



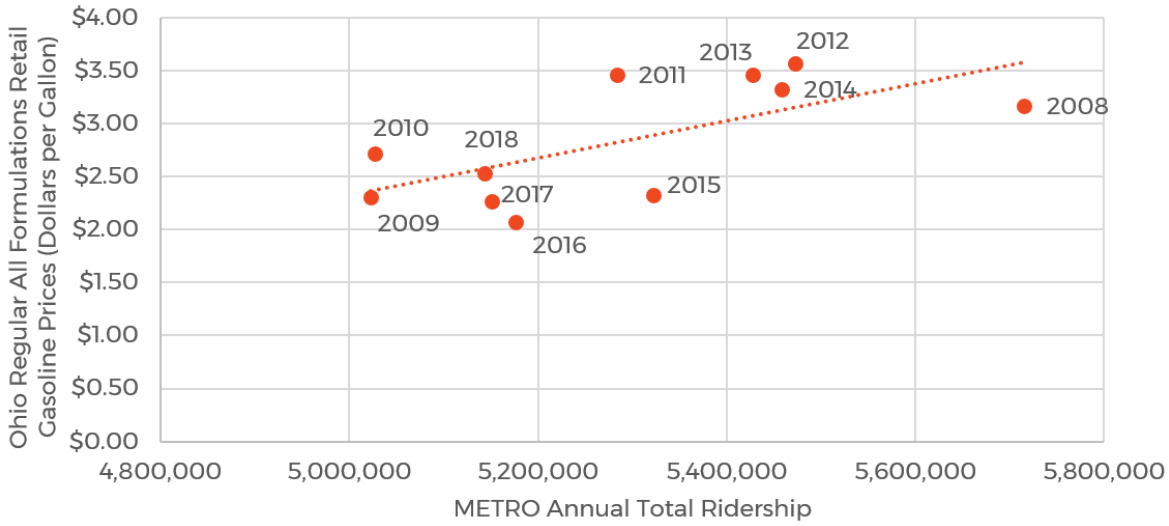
[2] Falling Transit Ridership: California and Southern California, https://www.scag.ca.gov/Documents/ITS_SCAG_Transit_Ridership.pdf

In addition to increasing vehicle ownership rates, it has also become more affordable to drive a car as gasoline prices[3] have declined since the early-2010s. Figure 3-19 compares transit ridership rates to average gasoline prices for the years 2008 to 2018. Gasoline prices vary greatly by location, and Summit County tends to have lower gasoline prices than the average for the State of Ohio.

Regardless of the absolute prices, as expected there is a positive correlation between fuel prices and METRO bus ridership. In the years when gas was over $3 per gallon (i.e. 2008, 2011 through 2014), ridership at METRO was close to or exceeded 5.3 million annual trips. In the years were gas was less than $3 per gallon (i.e. 2009, 2010, 2016 through 2018), ridership at METRO dropped below 5.2 million annual trips, with two years (2009 and 2010) approaching just over 5.0 million annual trips. There is a positive relationship between gas prices and transit ridership – as the cost of gas increases (driving becomes more expensive), transit ridership increases; as the cost of gas falls, transit ridership also decreases. However, this relationship is slightly weaker for those who already own a car or have reliable access to a car. These individuals are less impacted by and susceptible to fluctuations in the operating costs of a car and, therefore, are less likely to drastically change their modal choice when variable costs increase.

While many transit users do not own cars and are entirely transit dependent, some are marginal auto owners; they own or have access to a car, but are not always able to afford to operate and maintain it. Their ability to use their vehicle is contingent on being able to afford fuel, maintenance, and repairs, which makes them highly sensitive to fuel price fluctuations. When gas prices are high, driving becomes unaffordable, and they shift to using transit. When gas prices remain high for several years (particularly during an extended economic downturn, as occurred between 2008 and 2014), these marginal auto owners might give up their vehicles and become regular transit users. During longer periods of lower gas prices and economic recovery (such as the period between 2014 and early 2020), they acquire a vehicle and resume driving.

Figure 3-19: METRO Ridership and Ohio Gasoline Prices, 2008-2018 US Energy Information Administration, 2008-2018 NTD



[3] It should be noted that the prices shown are somewhat higher than the prices that most drivers would have experienced in Summit County during these years, for two reasons. The Energy Information Administration (EIA) estimates average prices for all grades of gasoline for the calendar year, weighted by the sales volume for each grade and formulation. Prices for the small amounts of premium fuel purchased would tend to skew the average price somewhat higher. Also, the data only is available at the state level.

3.2 Employment

Table 3-2 and Figure 3-20 shows the number of jobs in Summit County from 2002 to 2017, obtained from US Census Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics. The number of jobs in Summit County was 273,000 in 2017 (the latest year for which LEHD data is available). About 266,000 people were working in Summit County in 2002. This number increased by 6,000 (2.3%) by 2008, when the number of jobs passed 272,000. However, Summit County lost about 19,000 jobs (a 7% decline) between 2008 and 2009, and the number of jobs did not return to the 2008 level until 2017.

Table 3-2: Summit County Employment Levels, 2002-2017 LEHD

	2002	2010	2017
Employment	266,152	253,930	273,034
Employment Density	1.01	0.96	1.03

Figure 3-20: Summit County Employment Levels, 2002-2017 LEHD

The City of Akron continues to be commercial center of Summit County as it is home to the largest number of businesses and jobs in the county. Areas of medium and high employment densities have remained stable, with little growth beyond what was reported in 2002 and leading up to 2017 (Figures 3-21 through 3-23). Downtown Akron and the surrounding areas to the south and southeast are home to block groups that report employment density that exceed 15 jobs per acre including the Goodyear Headquarters and downtown Akron. Additionally, there are a few block groups that report employment densities between 10 and 15 jobs per acre, including the University of Akron (UA) campus. Other block groups in neighboring communities report medium levels of employment density. These include the commercial and retail centers located along (1) West Market Street near I-77 in Fairlawn, (2) Cuyahoga Falls along State Street, and (3) Barberton around the Summa Health campus. Each of these employment centers reports employment densities between 10 and 20 jobs per acre. Figure 3-24 presents the changes in employment levels in Summit County between 2002 and 2017. While downtown Akron and the surrounding areas remain the region's highest density employment areas, the number of jobs in several of these block groups have declined by more than 10%. However, the UA and Goodyear block groups reported either stable job levels or job growth of between 5% and 10%, respectively. Other areas of high job growth (+10%) include a number of block groups in south Akron as well as the commercial and retail centers near I-77 in Fairlawn.

Figure 3-21: Employment Density by Census Block Group in Summit County, 2002 LEHD

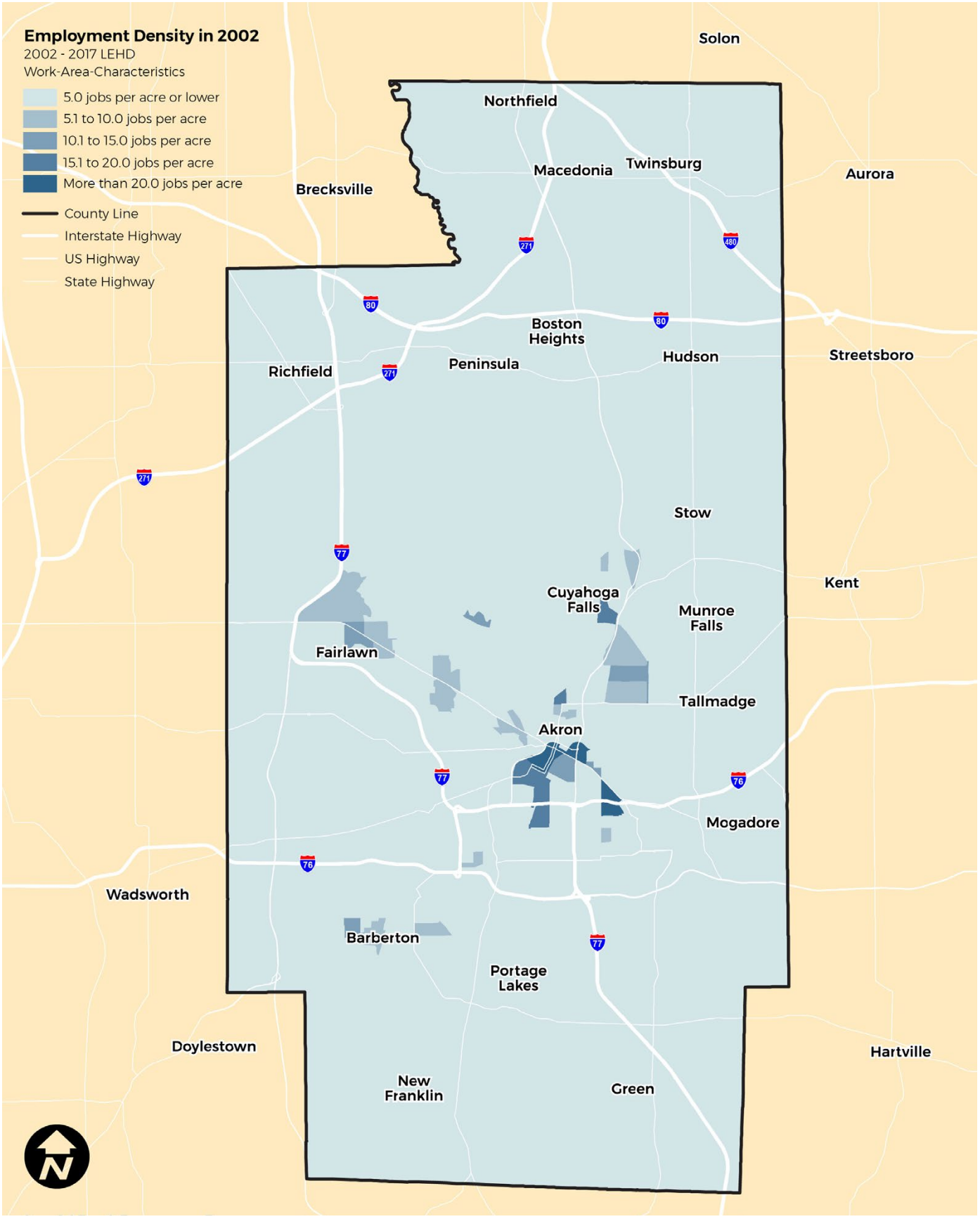


Figure 3-22: Employment Density by Census Block Group in Summit County, 2010 LEHD

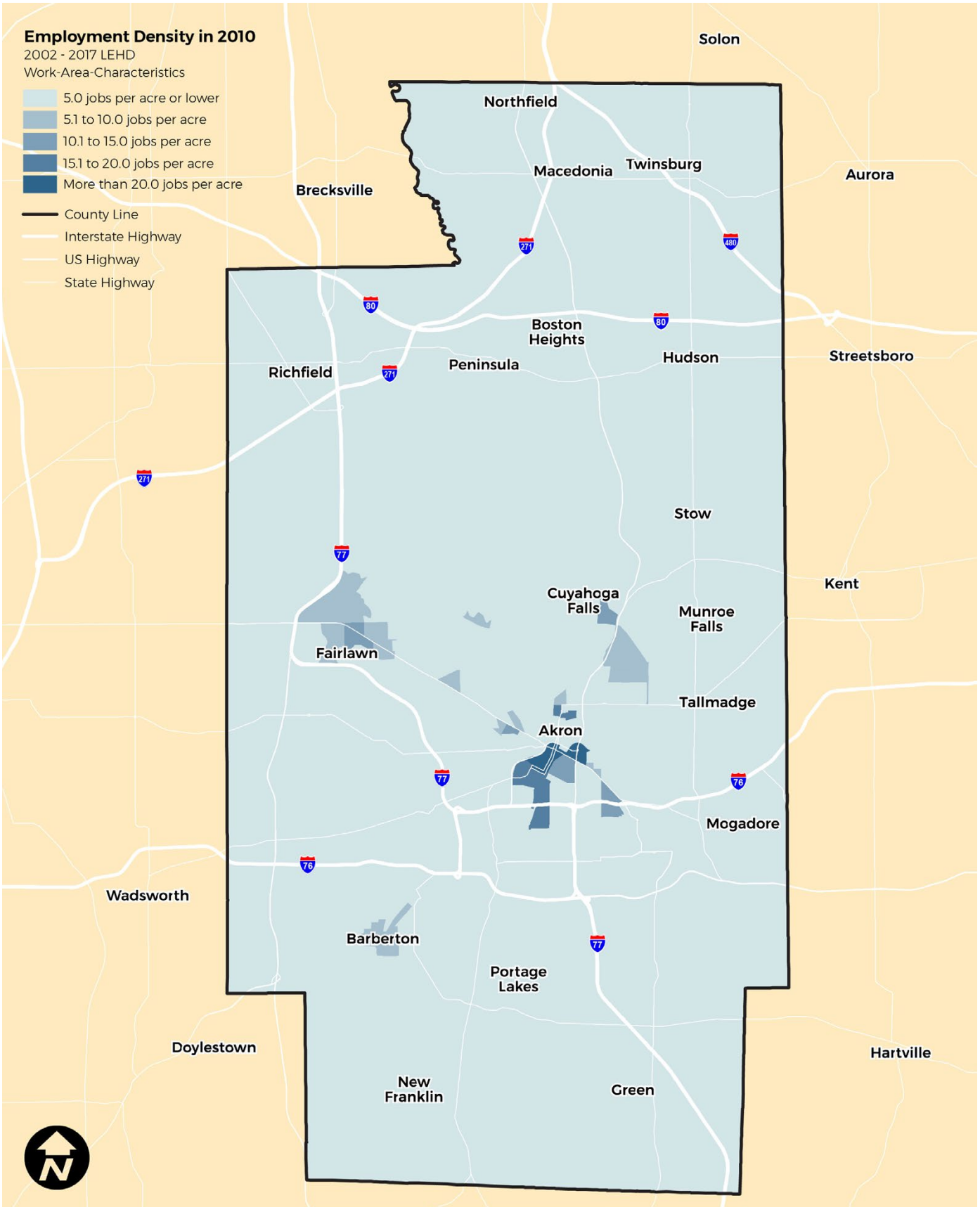


Figure 3-23: Employment Density by Census Block Group in Summit County, 2017 LEHD

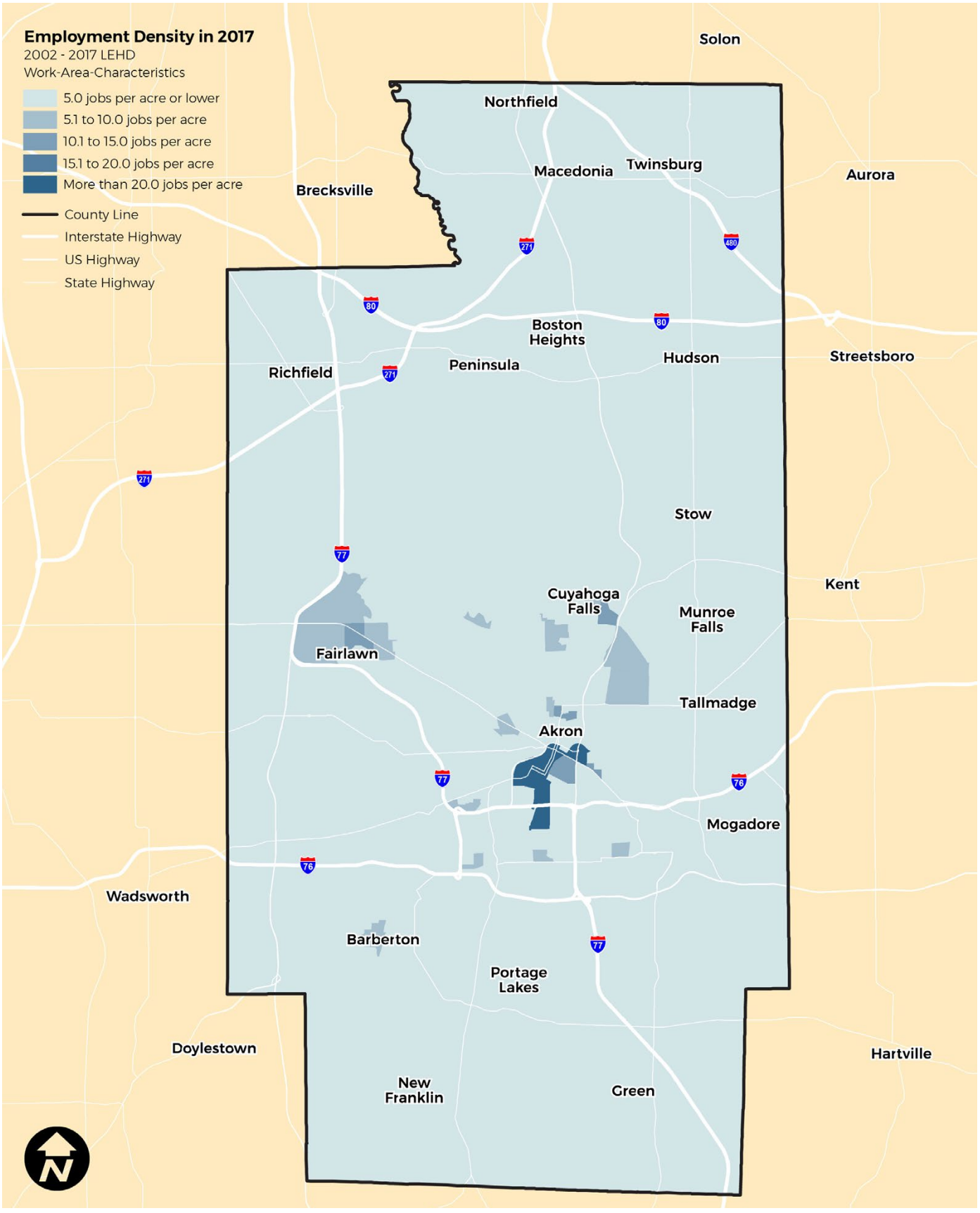
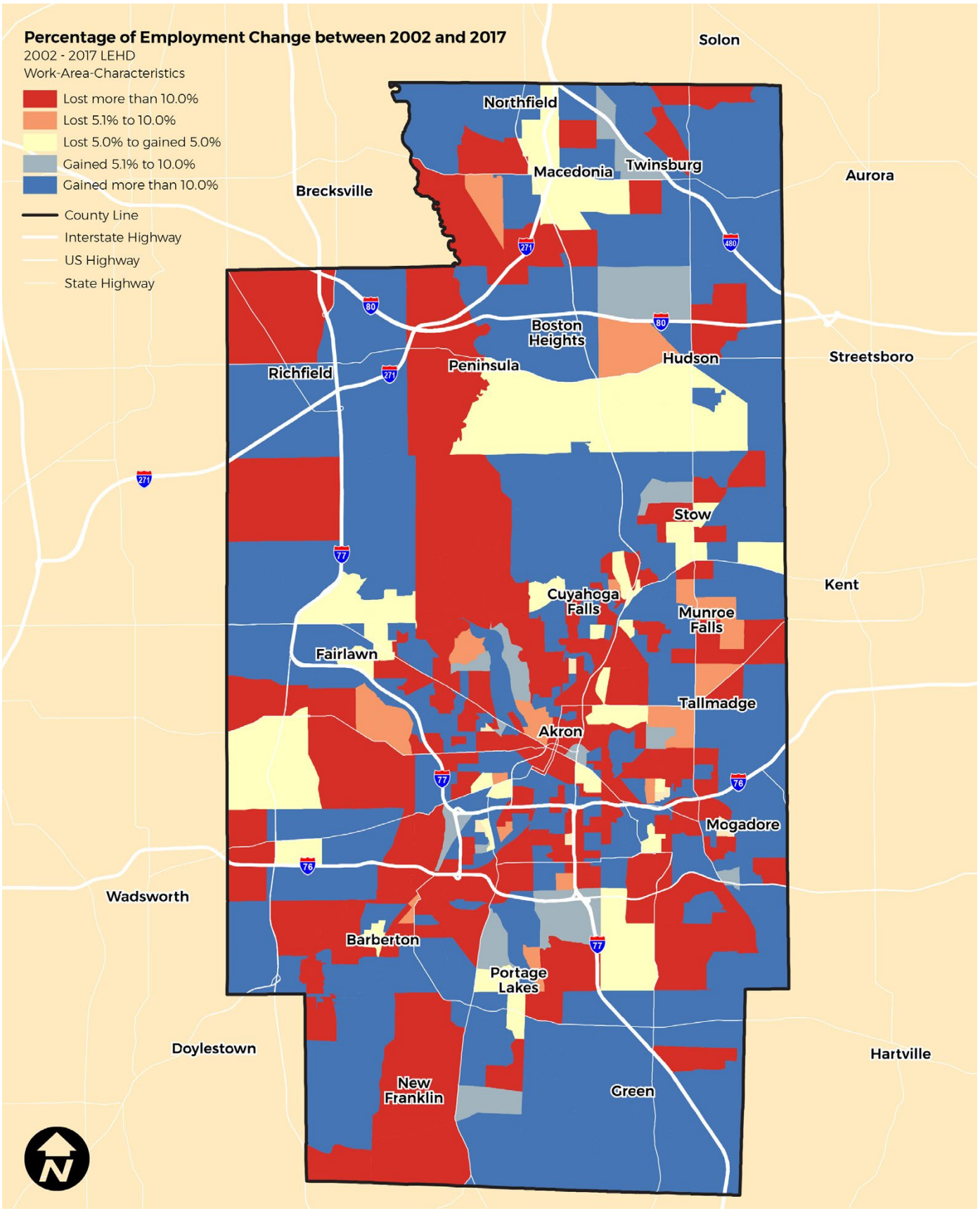
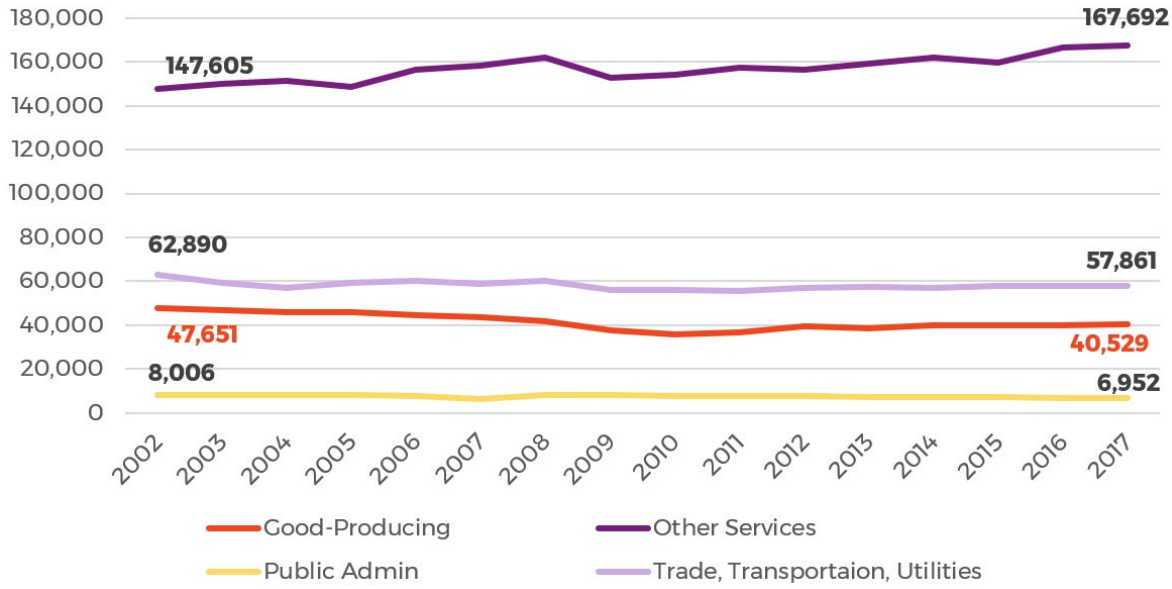


Figure 3-24: Percentage of Employment Change by Census Block Group in Summit County between 2002 and 2017, 2002-2017 LEHD



Jobs in Summit County can be categorized into four industry super-sectors that include (1) goods producing, (2) public administration, (3) other services[4], and (4) trade, transportation, and utilities. The number of jobs in each industry super-sector and their employment levels between 2002 and 2017 are presented in Figure 3-25. Similar to most medium and large cities in the country that experienced employment growth in the past decade, employment growth in Summit County was primarily due to the growth in service sectors, while job losses were reported in other sectors such as goods producing.

Figure 3-25: Number of Jobs in Summit County by Super-Sectors, 2002-2017 LEHD



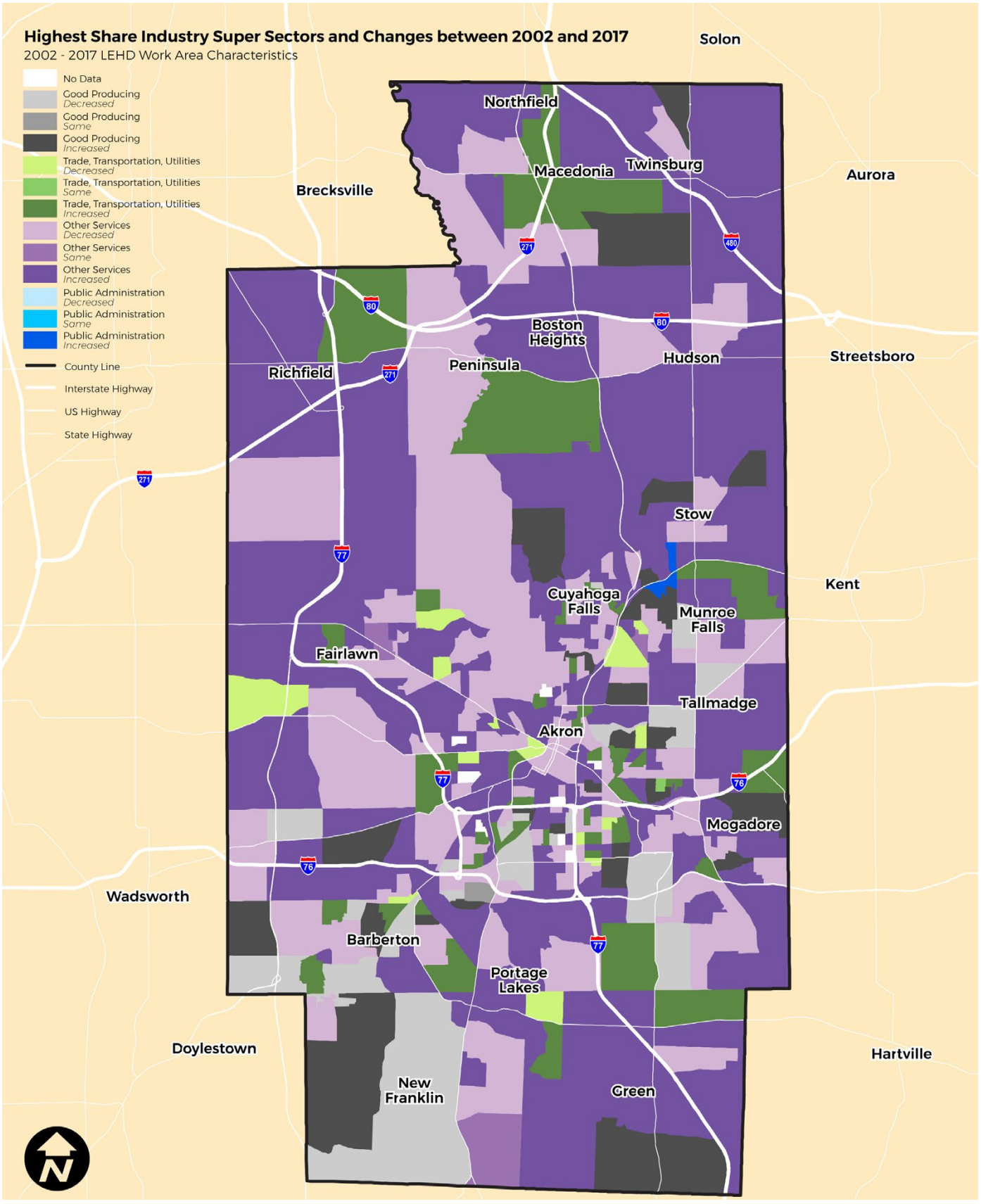
The majority of block groups that report expansion in the goods producing industry were in areas with low employment density Cuyahoga Falls, eastern Akron, and Barberton; or in Twinsburg, which is in the remote northeastern corner of the county, more than ten miles from downtown Akron (Figure 3-26). The trade, transportation, and utilities sectors were also generally located in more suburban or rural parts of the county.

The number of people working in goods producing and trade, transportation, and utilities industries in Summit County is declining and increasingly work in remote areas that are difficult for METRO to serve effectively with fixed-route transit.

Those who remain in those industries and rely on METRO for transportation are currently facing and would continue to face longer, more difficult commutes to work places located in low density areas with little to no pedestrian or cycling infrastructure. These remote work places are farther apart from everything else making these workplaces difficult to serve with traditional fixed-route public transit.

[4] Includes NAICS sector 51 (information), 52 (finance and insurance), 53 (real estate and rental and leasing), 54 (professional, scientific, and technical services), 55 (management of companies and enterprises), 56 (administrative and support and waste management and remediation services), 61 (education services), 62 (health care and social assistance), 71 (arts, entertainment, and recreation), 72 (accommodation and food services), 81 (all other services except public administration)

Figure 3-26: Highest Share Industry Super Sectors and Their Changes between 2002 and 2017 by Census Block Group, 2002-2017 LEHD



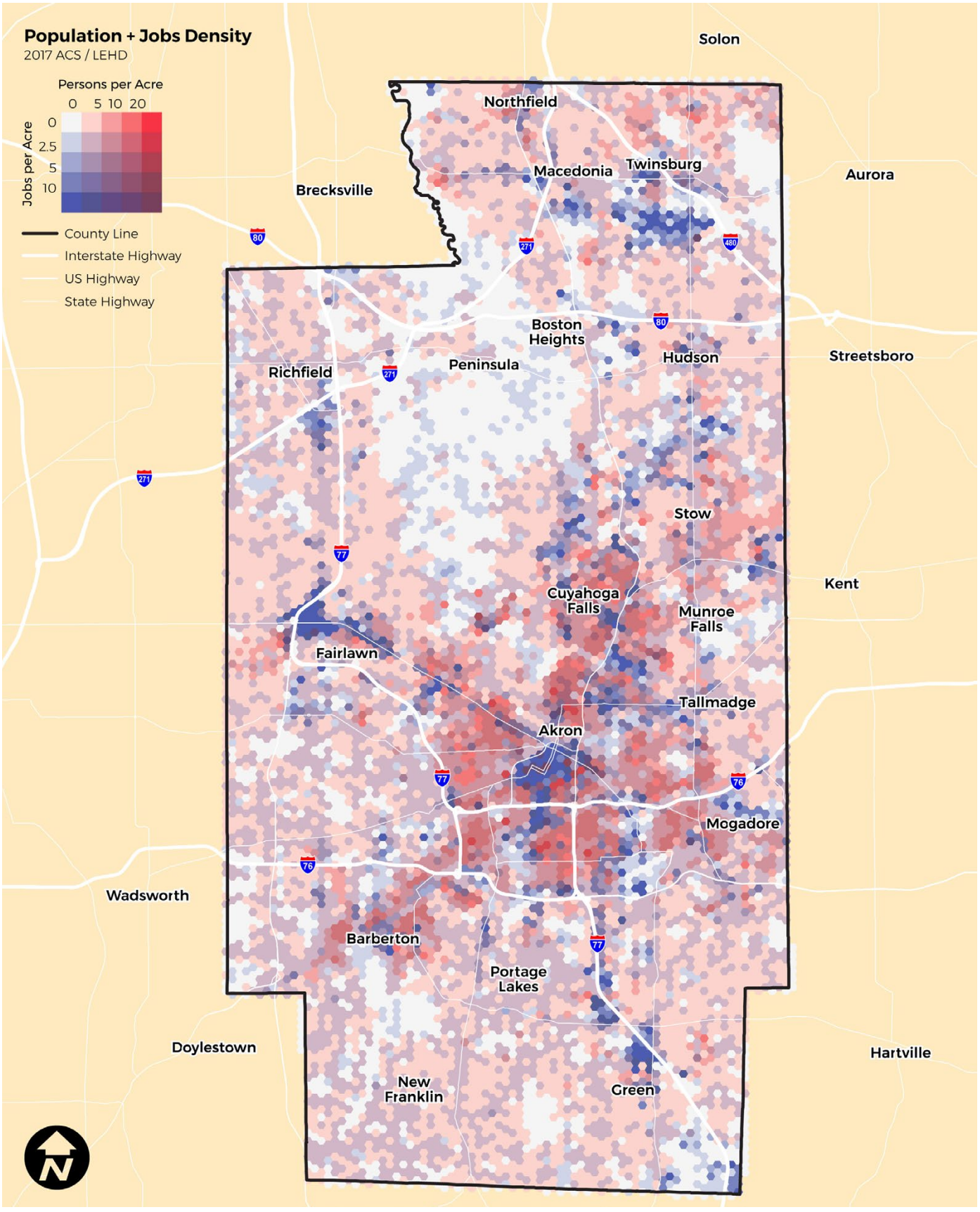
3.3 Transit Propensity

The presence of both residents and jobs in one area is a strong indicator of the potential volume of travel in a given area and are good indicators for potential transit usage. A medium to high population density suggests more people can access transit service using active transportation means such as walking.

A medium to high employment density not only means more jobs, but also a higher level of other activities such as retail, food, accommodation, and entertainment. As the combination of population and employment density rises, the proportion of people, jobs, and other activities that have easy access to transit service also rises, and thus the proportion of trips made using transit is likely to rise as well.

Figure 3-27 represents the combined population and employment densities in Summit County in 2017. Colors closer to the red spectrum indicate higher population density, whereas colors closer to the blue spectrum indicate higher employment density. Varying combinations of blue and red as they approach purple represent increasing levels of mixed-use patterns. Generally in Summit County, residential and employment uses tend to be separated distinctively, especially in higher density areas. There are very few places that have a high population density over 20 persons per acre, but many are reported to have medium-high density between 10 and 20 persons per acre. Employment density, on the other hand, appears to be more concentrated as both Fairlawn and downtown Akron are clearly the two biggest employment hubs in the county, where METRO can provide regular fixed-route transit service at a reasonable cost. However, in the more suburban or rural areas of the county, a fairly sizable concentration of employment can be seen in Twinsburg, and to a lesser extent, in Macedonia. Downtown Green and Richfield also have noticeable concentrations of employment. Stow, Cuyahoga Falls, and Tallmadge show medium levels of employment density, but are more spread out than the other communities mentioned above. Such development patterns strongly encourage the use of a personal automobile, and make using other means of transportation, including public transit, much more difficult.

Figure 3-27: Population And Employment Density in Standardized Geography in Summit County, 2017 ACS, 2017 LEHD



3.4 Walkability

Every transit trip begins and ends as a pedestrian trip, so the walkability of development, including the presence of sidewalks, crosswalks, and other pedestrian amenities is extremely important. Therefore, the ratio of sidewalks to roadways is a useful, quantifiable measure for walkability. While sidewalk ratio does not capture all of the elements of walkability, like pedestrian scale or access from sidewalks to adjacent development, it provides an initial indication of the relative transit-friendliness of the market, which can be supported by more detailed analysis at the local level.

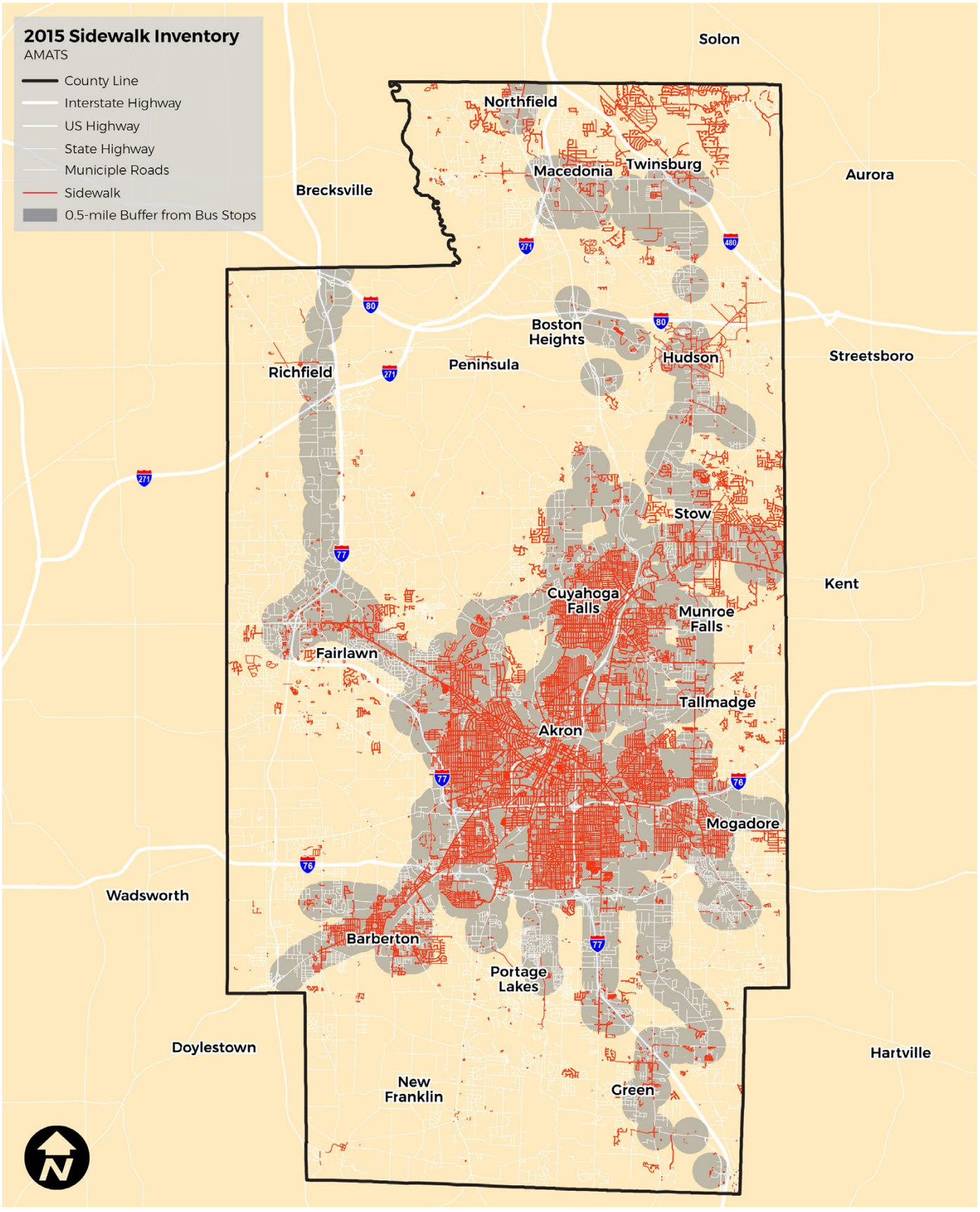
The AMATS sidewalk data for Summit County showed that in 2015, there were 2,393 miles of sidewalks in Summit County, most of it running along 3,462 miles of roads. This yields a sidewalk-to-road ratio of 0.69. The ratio would approach 2.0, were there sidewalks on both sides of every road (except for interstates and other limited access roads, which make up a small percentage of the roadway network). A sidewalk ratio of 0.69 indicates serious pedestrian access deficiencies, with sidewalks in place on barely 1/3 of the County's roadway network.

Sidewalks are not distributed evenly across the county. Shown in Table 3-3 below, places within a one-mile radius of downtown Akron had a sidewalk ratio of 1.46--indicating that, on average, sidewalks were present on nearly 75% of roads in that area. The ratio dips to 1.4 in the area between 1 and 2 miles of downtown, and to 1.0 in areas between 2 and 5 miles of downtown. Sidewalk becomes scarce and inconsistent in parts of the county more than five miles from downtown, where the sidewalk ratio is 0.59. Figure 3-28 on the next page shows the distribution of sidewalk in Summit County and 0.5-mile buffer from METRO bus stops.

Table 3-3: Sidewalk-to-Road Ratio within 0.5-mile Buffer from Bus Stops within Summit County, by Distance Away from Downtown Akron, 2015 AMATS Sidewalk Inventory

Sidewalk to Road Ratio within 0.50-Mile Buffer from Bus Stops within Summit County	
1 mile from downtown Akron (including downtown Akron)	1.46
Between 1 and 2 miles from downtown Akron	1.4
Between 2 and 5 miles from downtown Akron	1.02
Beyond 5 miles from downtown Akron	0.59

Figure 3-28: Sidewalks in Summit County and 0.5-mile Buffer from Bus Stops, 2015 AMATS Sidewalk Inventory



3.5 Land Use

Figure 3-29 on the next page shows the spatial distribution pattern of various land uses in Summit County, collected by Summit County Fiscal Office and last updated in September 2020. It is the most up-to-date and comprehensive data on land use for Summit County. Most of the categories are straightforward, however, the "Exempted" category requires further explanation and is detailed further below. In short, this category includes land in public ownership or in public or private institutional uses, including parks, schools, and churches.

"Exempted" includes the following uses:

- Properties owned by Federal, State, and County governments
- Properties owned by townships, local municipalities
- Properties owned or acquired by metropolitan housing authorities
- Properties owned by park districts (public)
- Property owned by colleges, academies (private)
- Charitable exemptions - hospitals - homes for aged, etc.
- Churches, etc., public worship
- Graveyards, monuments, and cemeteries
- Community urban redevelopment corporation tax abatements
- Community reinvestment area tax abatements
- Municipal improvement tax abatements
- Municipal urban redevelopment tax abatements
- Other tax abatements

The predominant land use in Summit County is residential, including rural, suburban, and urban/multi-family. The various cities and towns in the county are primarily suburban residential with urban/multi-family residential use largely concentrated in the immediate vicinity of downtown Akron, Cuyahoga Falls, and Barberton.

Rural residential use is a sizeable concentration north of Fairlawn, but was otherwise scattered around the peripheral areas of the county. Commercial uses are relatively concentrated, however, they also tended to be located in areas along arterials and away from higher density residential uses. Industrial uses largely followed arterials and tended to form their own "bulbs" of homogeneous uses instead of mixing with other uses. Additionally, there are a small concentrations of various industrial uses located south of Twinsburg and Macedonia, the area between Hudson and Stow, east Akron and into Tallmadge and Mogadore, south Akron and into Barberton. Overall, the land use pattern in the county leans toward continuous single use with very little mix. This land use pattern strongly encourages the use of automobiles and discourages other modes of transportation such as walking, biking, or public transit.

Figure 3-29: Land Use in Summit County, Summit County Fiscal Office, Updated in 2020

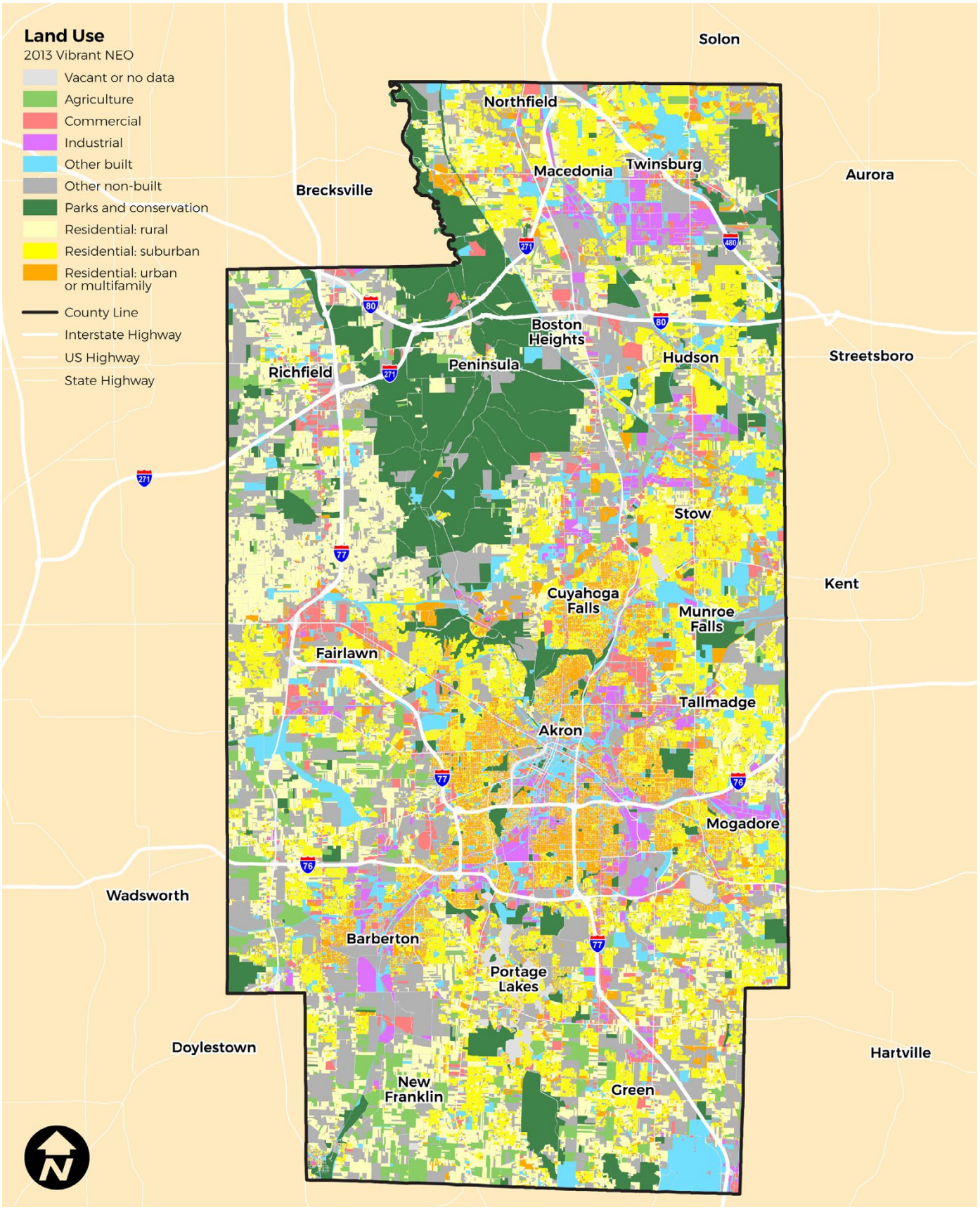
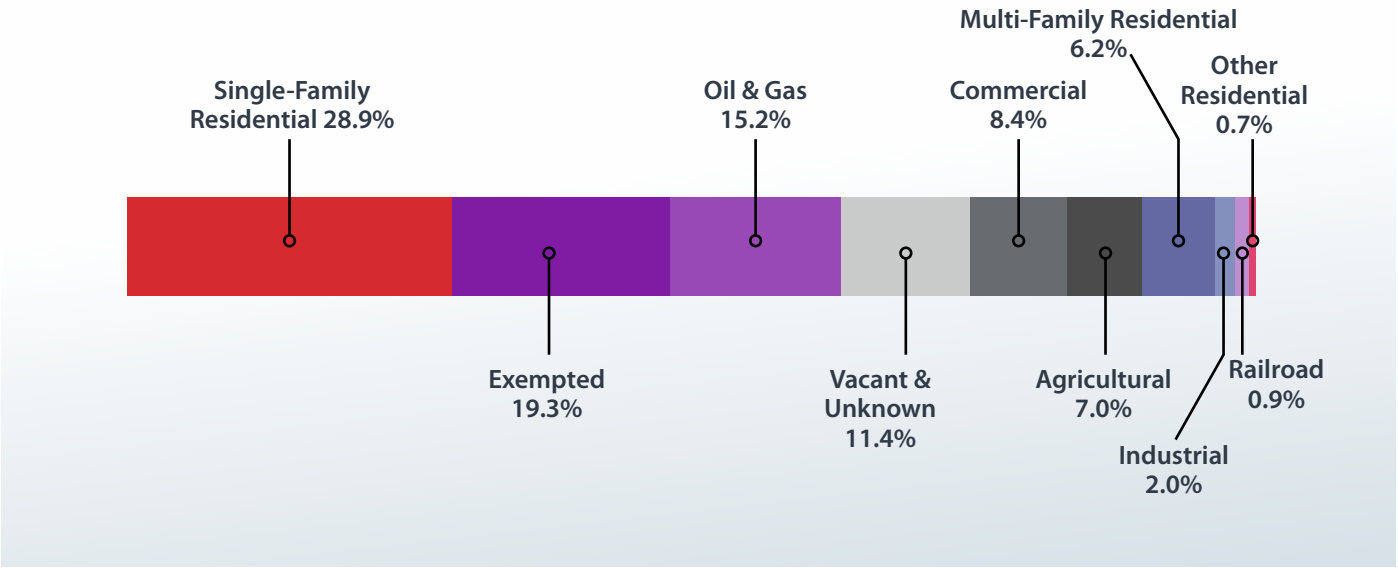


Figure 3-30 below shows the percentages of each land use category within Summit County. Residential uses account for the largest share at 35.8% and includes single-family residential, multi-family residential, and other types of residential such as mobile home. Of all residential uses, single-family residential was the highest at 28.9% while multi-family residential only accounts for 6.2%. The second highest share was exempted uses at 19.3%, which includes most of the downtown areas, government properties, parks such as the Cuyahoga National Park, churches, etc. Commercial uses account for 8.4%, slightly higher than agricultural at 7.0% and industrial at 2.0%. Railroads and related facilities account for almost 1% of the land. 11.4% of the land was reported as vacant or unknown.

Figure 3-30: Land Use Composition in Summit County, Summit County Fiscal Office, Updated in 2020



A deeper dive into the land use composition within a half mile of stops for both Route 1 and Route 2 (the two most used routes in METRO's fixed route system) was completed. Through the help of satellite images, the team was able to identify land occupied by roads and merged it with railroad uses into a new transportation category. Figures 3-31 and 3-32 show the land uses in percentage for Route 1 and Route 2, respectively.

The proportion of transportation use on both routes 1 and 2 is very high – 15.0% and 17.6%, respectively. Generally, in an urban area along transit corridors, roads would take up to 10% of the land. The unusually high percentage of transportation use, in part, was inflated by the location of interstate highways and the Innerbelt (OH-59) that lie within the catchment area of both routes. The mix of residential uses on both routes reflect the best-case scenario in the county, however, shares of single-family residential use is still quite high. Vacant parcels or land uses is also quite high, particularly for Route 2, at 10%, the fifth highest share of land use. This is not ideal in the short term, as vacant lots are not trip generators. However, this also means that the land can be redeveloped with relatively fewer restrictions than if it was otherwise occupied. In the long run, with proper guidance and policies, vacant lots can turn into transit friendly uses such as affordable housing, commercial, mixed-use developments including a combination of commercial, retail, and residential uses.

Figure 3-31: Land Use Composition Within Half Mile of Stops For Route 1, Summit County Fiscal Office, Updated in 2020

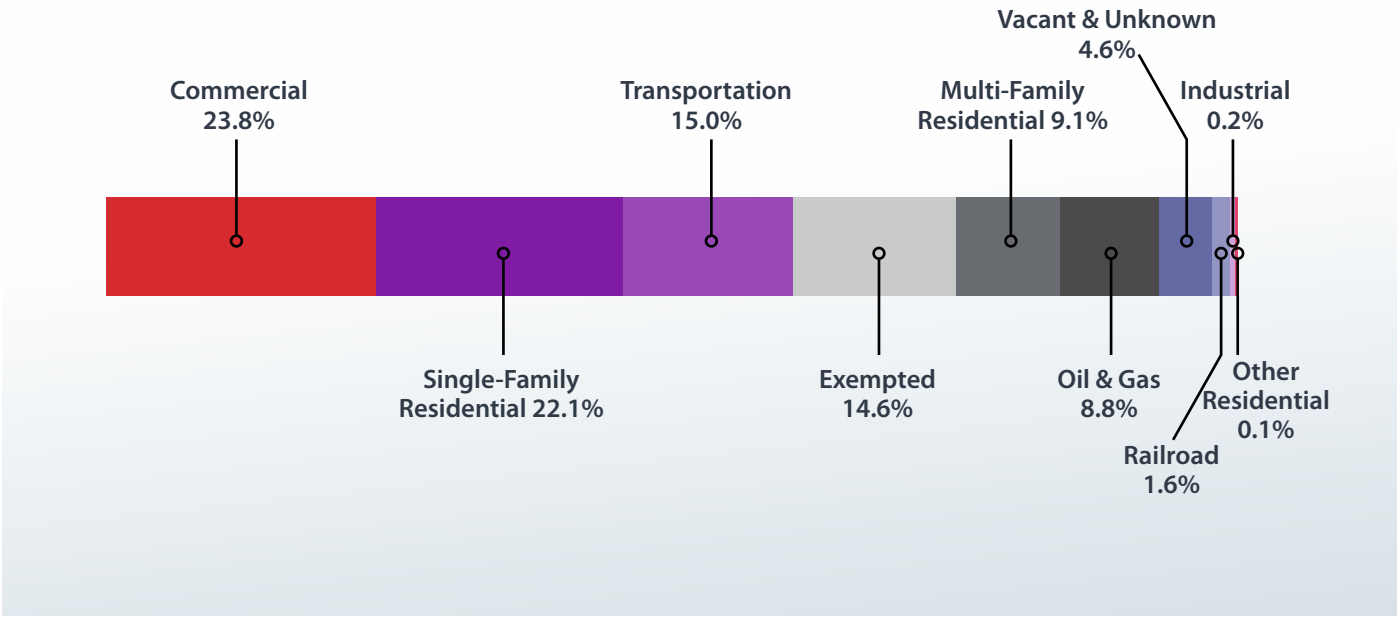
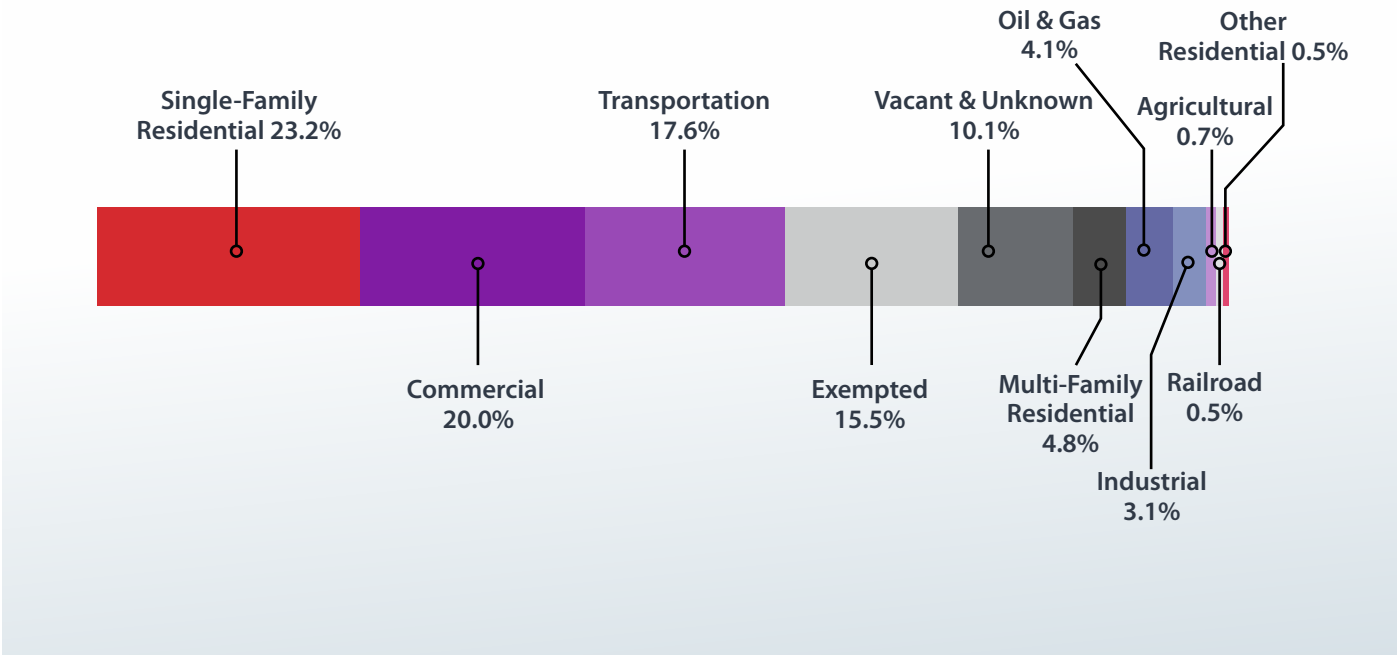


Figure 3-32: Land Use Composition Within Half Mile of Stops For Route 2, Summit County Fiscal Office, Updated in 2020



3.5.1 Transit Oriented Development

Reviewing land use from the transit perspective contrasts existing land use patterns to the ideals of transit-oriented development (TOD). TOD is high-density, mixed use development that is oriented to favor access by public transit. TOD seeks to create a symbiotic relationship between public transit and land development, by attracting private investment in transit-supportive development around public investments in high-quality transit service and infrastructure. TOD is essential to generating enough ridership to warrant high frequency transit service and major investments in transit facilities like transit centers, Bus Rapid Transit stations and dedicated bus lanes. High quality transit is essential to serving the transportation needs of high density, mixed-use developments.

TOD leverages public investment in transit to drive private investment in order to enrich neighborhoods and drive regional smart and sustainable growth. TOD connects transit investments with the region's vision for economic and physical development by using changes to land use and zoning codes, and packages of tax and investment incentives, to direct infill and redevelopment with TOD elements to areas around transit passenger facilities. There are six development principles that define the essential characteristics of a successful TOD. While these characteristics are essential to creating transit-supportive environments around station areas, TOD should be customized to be compatible with the character, aspirations, and market strengths of each individual neighborhood.

The six principles of TOD include:

- Medium to higher density development
- Mix of land uses
- Compact, high quality pedestrian environment
- Active and vibrant center
- Multi-modal connectivity
- Limited, managed parking

> Fundamentally, TOD is pedestrian-oriented development. Every transit trip begins and ends with a pedestrian trip, and, ideally, transit-oriented developments have a high-quality pedestrian realm and contain a wide variety of destinations within a half-mile walk of the transit station.

This allows residents to reach most of their daily needs – shops, gyms, restaurants, schools and day care centers – within a short walk of their homes. The combination of higher densities and a mix of uses in a compact, walkable area creates a vibrant atmosphere that is helpful in attracting new investment, jobs and residents, both from within and outside the region.

METRO's Strategic Master Plan (2012) and AMATS Region Public Transit Plan (2012) recommended changes to land use and zoning codes to promote TOD in Summit County. The City of Akron's Planning to Grow Akron study (2018), focused on growing Akron's housing stock, recommends land use and zoning changes that are consistent with TOD principles, although the plan does not explicitly time these land use changes to transit corridor or facility areas. The City of Akron's zoning code does not include a category tied directly to TOD or mixed-use development, but includes a unified planned development (UPD) district designation, which allows for mixed-use developments and relaxed parking and setback requirements.

Several of the Akron area's major arterial corridors—Market Street and Arlington Streets, Kenmore Boulevard, and many others—were streetcar corridors in the early 20th century, and contain many examples of streetcar-style development. Streetcar-style development was the original TOD, and featured one-to-four story, zero-lot-line buildings along the main arterial street. These usually had retail or

activated space at the ground level, with offices, hotel rooms, offices, second-story retail, and even warehouses and light industrial uses on the upper floors. The residential neighborhoods along the side streets were a mix of single and double houses, townhouses and apartment buildings, built at a density of ten or more units per acre. Given the larger household sizes of the early and mid-20th century, these neighborhoods easily could reach densities of 50 people and jobs per acre, or more. Over time, redevelopment at lower densities, and vacant buildings or lots in some areas, have reduced the density and transit-supportiveness of these corridors. New development since the 1950s took much different, lower density and less transit-supportive forms, provide poor pedestrian access and an auto-oriented scale.

METRO's challenge in land use and development is to work with local neighborhoods, municipalities, and developers, to encourage infill development and redevelopment to restore the density and transit-supportive elements in older urban corridors, to retrofit those elements to create walkable, mixed-use communities within existing suburbs, and to integrate TOD principles into new development occurring on greenfield sites throughout the county.

3.6 Existing Travel Pattern

Figures 3-33 and 3-34 show the home-to-work, or origin-destination (OD) dataset for Summit County in 2002 and 2017, with the arrows pointing toward the workplace zip-codes centroids. Both datasets were aggregated up to zip-code level from the Census block level, and filtered to show only patterns reflecting 500 or more OD pairs. It is worth noting that not all OD pairs represent traditional weekday commute trips, as some industries' shift patterns have commutes on various times of day and days of the week, including weekends. With this, the analysis assumes that an OD pair in the dataset represent one commute trip, this analysis will use the word "trips" to describe OD pairs for simplicity.

The varying line thickness reflects the total aggregated number of trips - thicker lines indicate a higher number of trips between the home and work zip-codes. Both annual analyses share the same scale and the same geography so they can be compared directly. By comparing the two analyses, we can see that trips to downtown Akron, where METRO's transit center is located, lost quite a few commuters over the 15-year period. Fairlawn captured more trips than downtown Akron from neighboring zip codes solidifying its role as an employment center in the county. Hudson remained the anchor in the upper parts county, however, Solon (in Cuyahoga County) has emerged as the regional employment hub and continuously attracted workers from northern Summit County. Also, the pattern indicates that southeastern Summit County has a stronger connection with Canton than with Akron, suggesting that some level of service integration or cooperation between METRO and SARTA may be beneficial to fulfill the transportation demand between these two areas of the region.

Figure 3-33: LEHD Home-to-Work Origin-Destination Pairs, 2002 LEHD

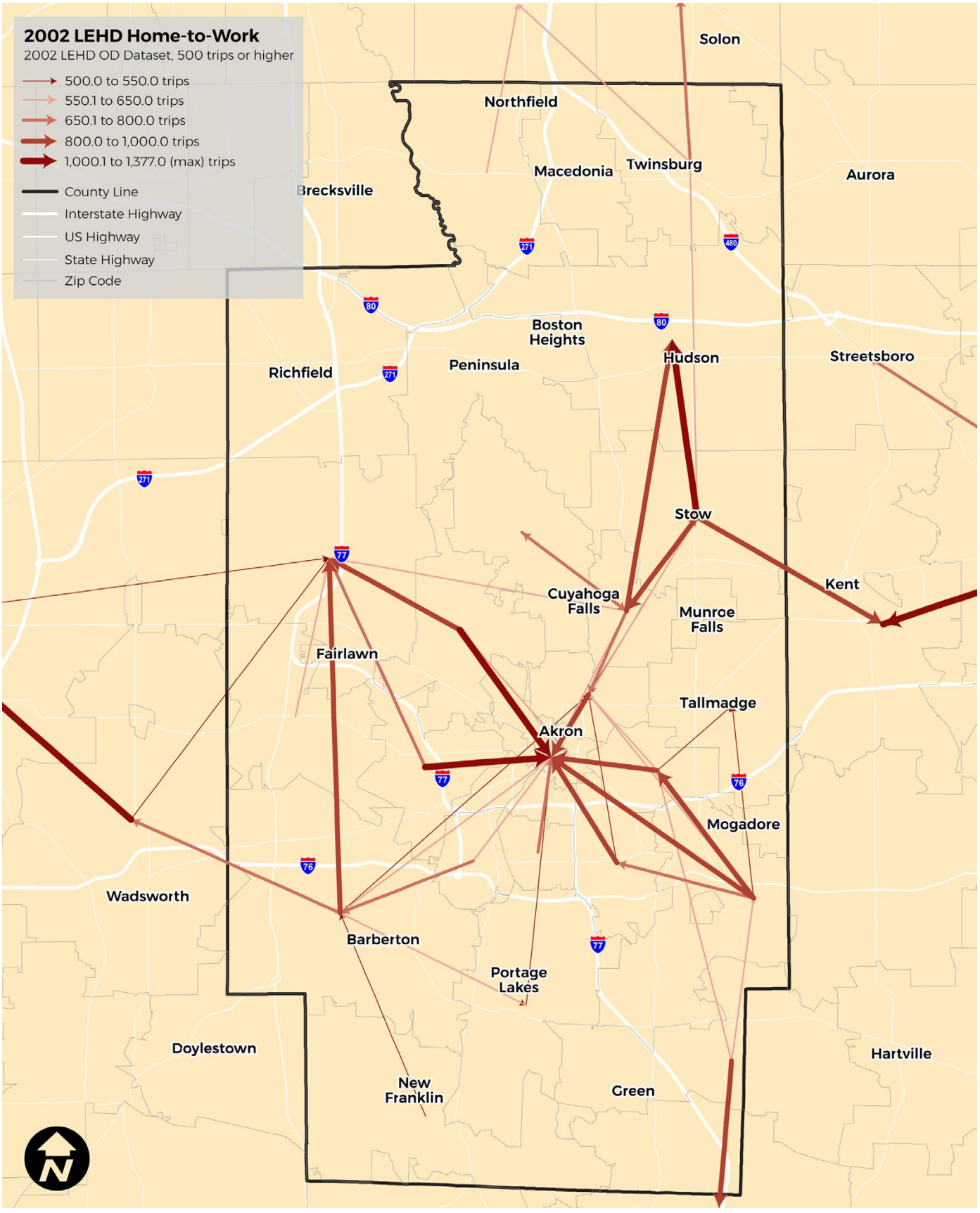
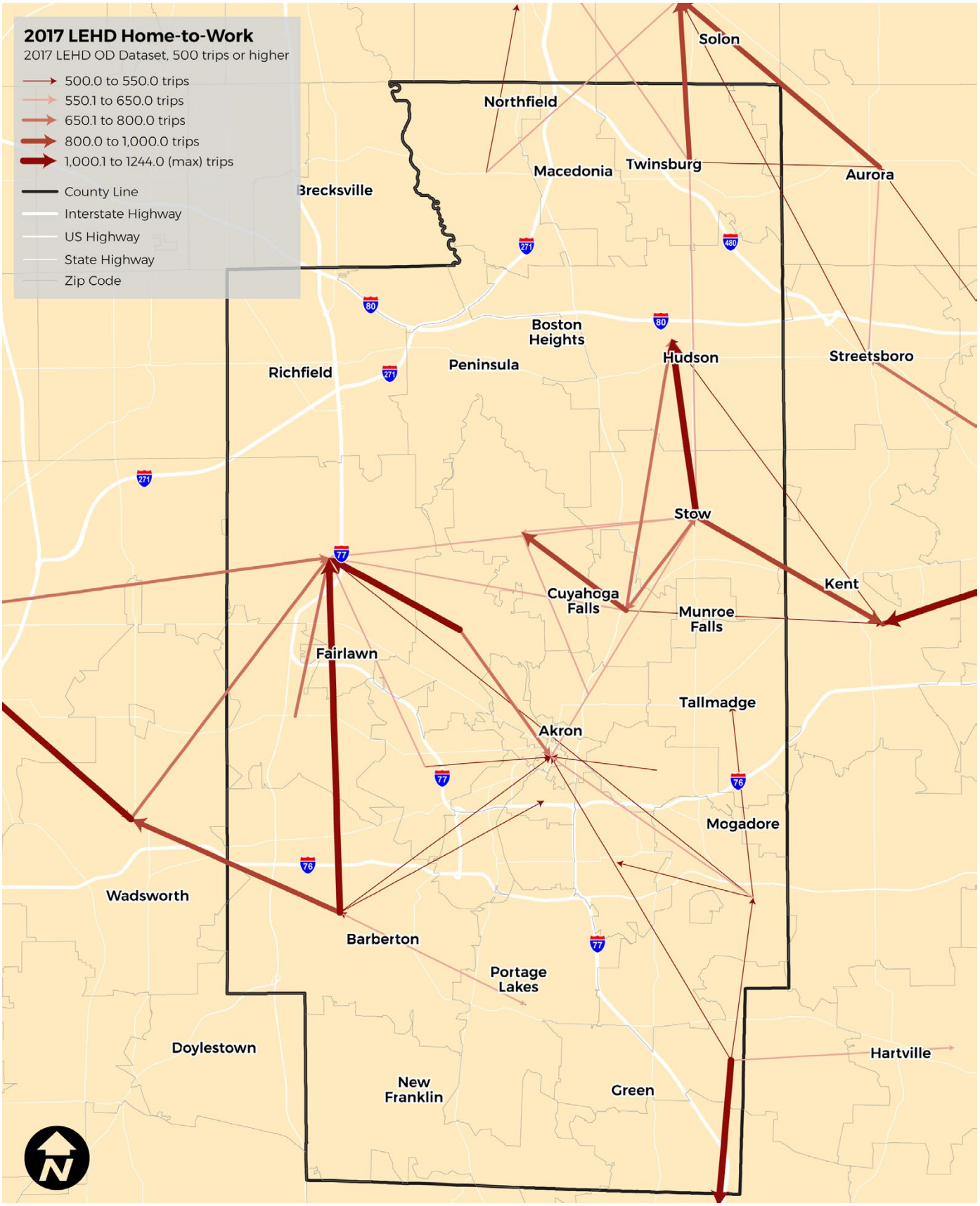


Figure 3-34: LEHD Home-to-Work Origin-Destination Pairs, 2017 LEHD



3.7 Gaps and Opportunities

Summit County is a challenging place to operate efficient, effective public transit service. Auto ownership rates are high. The county is long and narrow, with a widely dispersed population distributed in pockets that are largely cut off from one another by natural and man-made barriers. Northern Summit County is separated from Akron by more than ten miles of nearly vacant land, including Cuyahoga Valley National Park. Unlike some northeast Ohio counties, Summit County's population is not shrinking. But it also is not growing, depriving METRO of a growing pool of potential riders, a growing tax base, and increasing traffic congestion, which can impel the use of transit. The population also has aged, and is projected to age further in the next ten years, shrinking the workforce and increasing need for demand response service.

Most significantly, population has shifted from densely populated core areas in and around Akron, where METRO offers its best and most productive bus service, to lower-density suburban areas that are challenging for METRO to serve efficiently. Most suburban residents are affluent and have their own vehicles, but significant numbers are elderly, disabled, non-drivers, or lack access to a private vehicle. Many manufacturing and service jobs also have moved from the region's core to its suburban periphery, creating a gap between employers, who need access to labor markets outside their immediate areas, and potential workers, who need connections to workplaces in suburban and rural areas. This gap is part of a larger pattern of gaps, between METRO's fixed-route bus system—oriented to serving downtown Akron, and mostly limited to serving Summit County—and a regional transportation market increasingly dominated by suburb-to-suburb and inter-county travel patterns.

METRO's challenge over the next ten years and beyond, is to adapt its service offerings to the evolving mobility needs of a changing, and diverse population, while promoting infill and redevelopment to revitalize existing and establish new transit-supportive neighborhoods and corridors throughout the County. In meeting this challenge, it is imperative that the solutions provide equitable access to opportunity, ensuring that connections are created and improved for transit loyal customers. Meeting these challenges will be difficult, but is essential if METRO is to meet the transportation needs of its residents and employers, and support the county's economic and community development.

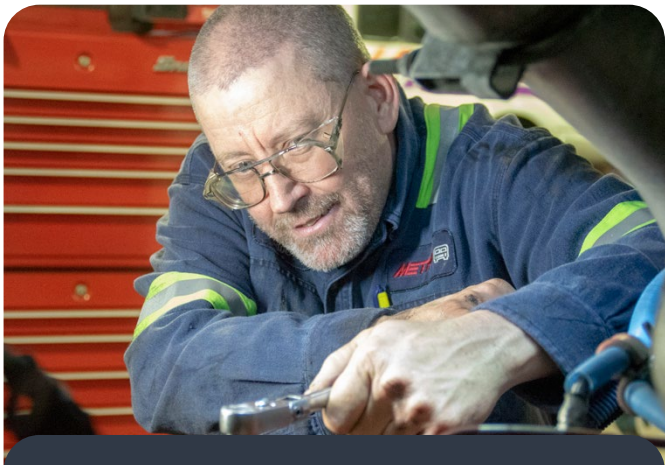


Figure 3-35:

Market Analysis - Gaps

1. Population migration from urban core to areas not served well by fixed-route service
2. Manufacturing, service jobs migration from urban core to areas not served well by fixed-route service
3. Existing fixed-route network does not match travel patterns
4. Lack of sidewalk coverage limits mobility and access for transit users
5. TOD offers potential to attract potential transit users and investment to key transit corridors

4. Public and Internal Engagement

The goal of the Strategic Plan's outreach program was to inform and gather input from the public and stakeholders in Summit County about the Strategic Planning process. This included soliciting feedback at all stages of the plan to help develop answers to the three main questions: **"Where are we now?", "Where are we going?" and "How do we get there?"**

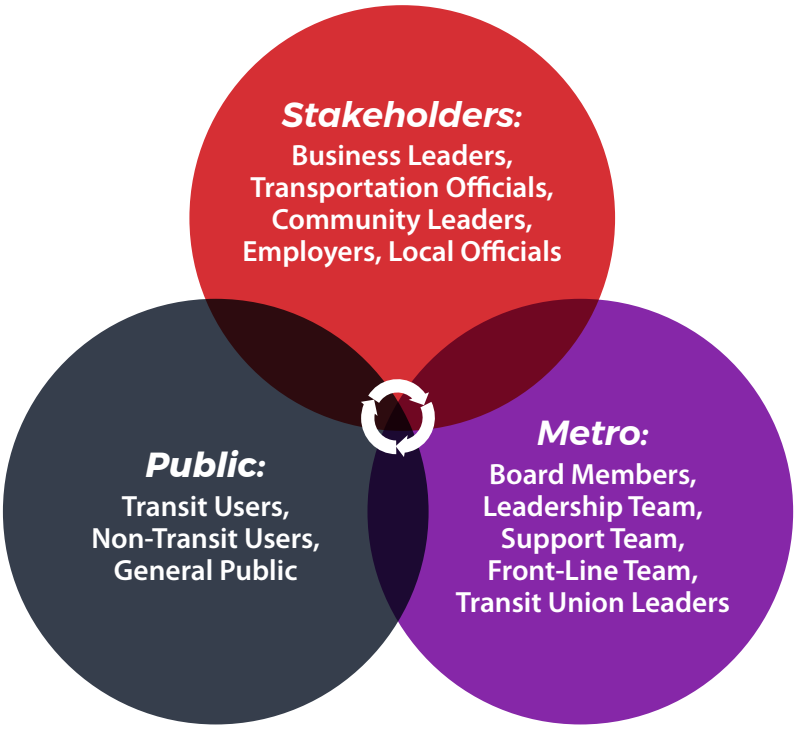
The outreach program offered a variety of outreach methods tailored to provide information and input opportunities to everyone who lives, works, studies, employs people or travels in Summit County.

A tiered 360-degree approach was used to target key audiences, with outreach in the community and "inreach" within METRO's organization (Figure 4-1).

Different approaches were used to target various groups, such as meetings, surveys, in-person open houses, workshops, virtual webinars, and more.

Inreach with METRO team members yielded insights about the organization that could only be provided by those who know it best, as well as a different perspective on public perceptions of METRO and its performance by hearing from those who work with METRO's customers every day.

Figure 4-1: 360 Degree Approach to Target All Key Audiences



Outreach and engagement activities included interviews, focus groups, workshops, public meetings, and surveys.

Table 4-1 below summarizes the various approaches the planning team employed to engage different groups of the public.

Table 4-1: Outreach Approach for External Target Groups

Outreach Approach	Interviews	Focus Groups	Workshop Meetings	Public Meetings	Online Survey	On-Board Survey
Stakeholder Target Groups						
Top Officials Business Leaders	✓	✓		✓		
Key Employers Local Officials	✓	✓		✓		
Transportation Officials	✓	✓		✓		
Community Leaders, Employers Business Owners	✓	✓	✓	✓	✓	
Public Target Groups						
General Public Transit Users & Non-Users				✓	✓	✓

Table 4-2 summarizes the approaches that the planning team used to engage various groups within METRO during the Strategic Plan process.

Table 4-2: Inreach Approach for Internal Target Groups

Inreach Approach	Kick-Off Meeting	Focus Groups	Workshop Meetings	Inreach Open House	Online & Paper Survey	Presentation
Internal Target Groups						
Board Members	✓		✓			✓
Leadership Team Members	✓		✓	✓	✓	✓
Support Team Members		✓		✓	✓	✓
Front-Line Team Members		✓		✓	✓	✓
Transit Union Leaders		✓		✓	✓	✓

The remaining sections in this chapter detail the outreach efforts for and feedback received from the public, stakeholders and METRO team members.

4.1 Public Outreach

4.1.1 Public Outreach Events

Two extensive rounds of public outreach meetings and events were held during the formation of the plan. The first series of events, held in February and March 2020, allowed the public to provide initial input on "Where are we now?", providing their insights on METRO's current strengths and weaknesses, and also begin to envision "Where are we going?" through an online survey. In this first round, participants were able to review the results of the State of the System and Market Analysis. The second series, held in September 2020, presented the project recommendations and action plan for feedback. Additional details on both rounds of outreach are provided below.

First Round of Public Outreach (February-March 2020)

The initial public outreach effort consisted of in-person events, online and paper surveys, and an on-board survey. A schedule of the initial outreach events held in this first round is included in Table 4-3.

Table 4-3: First Round of Public Outreach Events

Event	Date and Time	Location
Public Open House	March 10th, 2020 6:30AM – 6:30PM	RKP Transit Center
Buses & Brews	March 10th, 2020 4:00PM – 7:00PM	Ignite Brewing Company
Buses & Brews	March 10th, 2020 7:00AM – 10:00AM	Corner Cup Coffeehouse
Buses & Brews	March 10th, 2020 5:00PM – 8:00PM	Rush Hour Grille

In-Person Events

The first formal public outreach event was conducted at RKP Transit Center on March 10th, 2020, shortly before the COVID-19 pandemic caused cancellation of public events. The team set up stations at two locations in the transit center, presenting a summary of existing condition analyses and soliciting feedback, comments, and opinions from METRO customers. The team provided multiple iPads to provide customers with an opportunity to respond to the online survey, the results of which are shown below. In addition, a short, one-page survey was available on paper or online for customers to complete during the few minutes that they waited for their bus. Additional comments and ideas were hand-recorded by team members as they talked with members of the public. Team members actively approached METRO customers and gathered their feedback on the strategic plan. To encourage participation, tokens including key chains, METRO branded reusable bags, and pens were given to those who engaged and provided their comments.

A series of outreach events titled "Buses and Brews" was also planned for early March 2020. These events were scheduled at coffee shops and other establishments throughout Summit County to effectively reach out to METRO users and non-users, informing them about the strategic plan and encouraging them to fill out the online surveys. Only three Buses and Brews events were held before the impacts of COVID-19 prevented METRO from holding public events, however METRO team members engaged with over 60 members of the public during these events. Many of those who participated were non-riders, whose perceptions of public transit can be difficult to obtain, but are vital to maintaining METRO's relevance to the non-riding majority of Summit County residents, and maintaining METRO's traditionally high level of public support.

4.1.2 Surveys

Online Surveys

The online survey, powered by MetroQuest, was distributed by METRO, its partners and stakeholders through email and social media forums beginning in March 2020. Figure 4-2 shows the card-like interface of the survey that stays consistent regardless the survey was taken on a personal computer or on a mobile phone. It was also promoted at in person events through cards with QR codes and a link was available on METRO's website. Targeted Facebook advertising was used on a limited basis to increase participation of key demographic and geographic groups. Transit users were able to take the survey during public outreach meetings and events using the supplied iPads as well as through their personal devices. In addition to the online MetroQuest survey, specific surveys were developed and deployed at the public outreach events using both online (hosted by Survey Monkey) and paper versions.

The MetroQuest survey collected information from over 600 transit users and non-users, bridging an important gap in data collection. Online survey information collected included rankings of transit related features such as travel speed and comfort. It also allowed respondents to provide approximate locations of home, work, shopping, and regular entertainment destinations; as well as other non-personal identifiable demographics information. A summary of the survey responses is provided below.

Figure 4-2: MetroQuest Survey Interface

While demographics information was not asked until the last card, it's a good idea to show these before we get to the other results to provide some context. Shown in Figure 4-3 to 4-5, respondents were primarily of working age, with 34% between ages 40 and 54, and 25% between ages 25 and 39. Only 9% were over 65 and 15% were under age 24. Half of survey respondents primarily drive and 43% primarily use transit. About 41% of respondents were frequent transit users, and 70% said they use transit at least once a month. Only 11% of respondents said that they never use METRO. Given that most Summit County residents rarely or never use transit, this sample is heavily skewed towards regular and occasional transit users.

Figure 4-3: Online Survey - Age Distribution

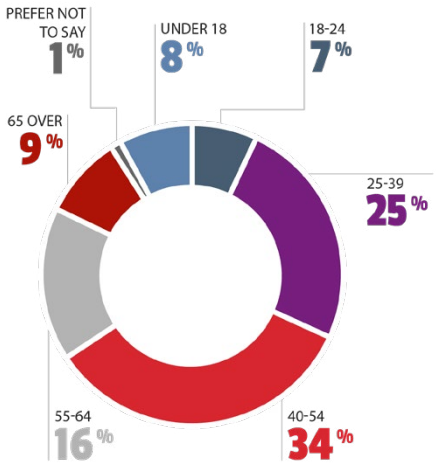


Figure 4-4: Online Survey - Primary Mode of Transportation

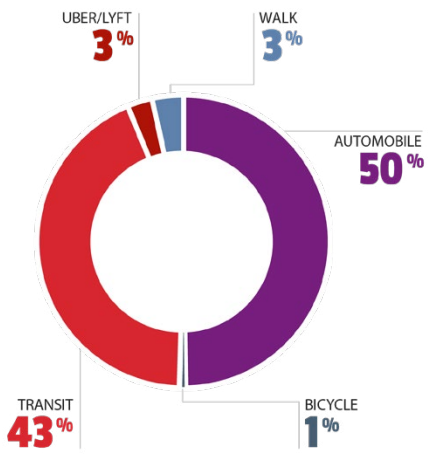
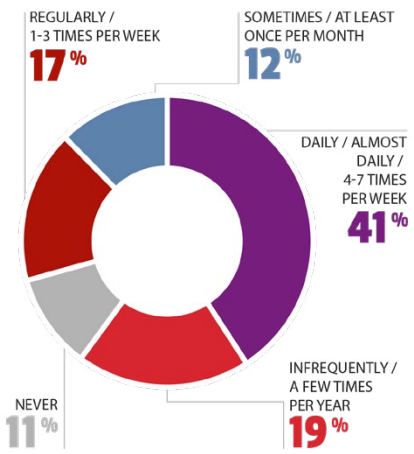


Figure 4-5: Online Survey - Use of Transit



Respondents were asked to choose five of these eight characteristics (shown in Figure 4-6), then rank them in order of importance/priority. The results were then translated to a points-based system where each respondent's highest rank received 5 points, and the lowest rank received 1 point. The total score for each characteristic was the sum of the points for all respondents. The results of the ranking are shown in Figure 4-7. The scores clearly show that service availability (service is near home, and close to destinations) and convenience (frequent service) are the most important characteristics in people's decision to use transit.

Figure 4-6: Online Survey - Priority Ranking

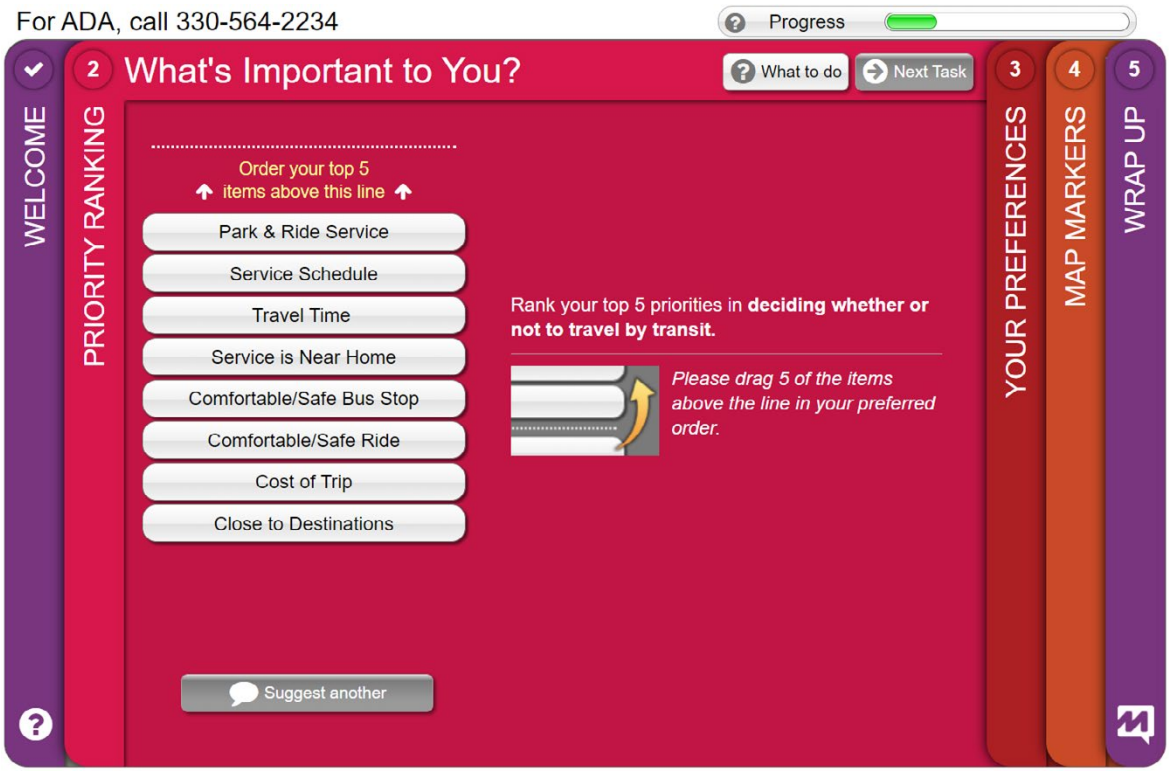
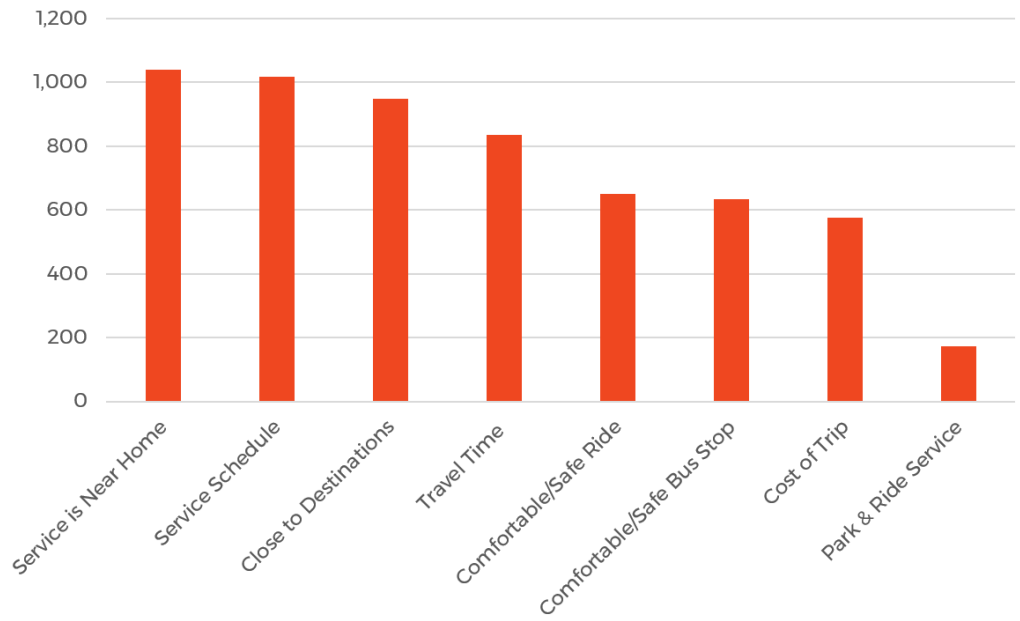


Figure 4-7: Online Survey - Transit Characteristics Ranking



The survey asked respondents in what type of setting (urban neighborhood, suburban area, downtown city center or rural area) they currently live and work, then asked in which of those settings they see themselves living and working in ten years. Screenshots of questions on residence and workplace settings are shown in Figure 4-8 and 4-9. It should be noted that most survey responses were received before, and were not influenced by, the COVID-19 pandemic.

Figure 4-8: Online Survey - Residence Setting (Future Residence question shares the same choices)

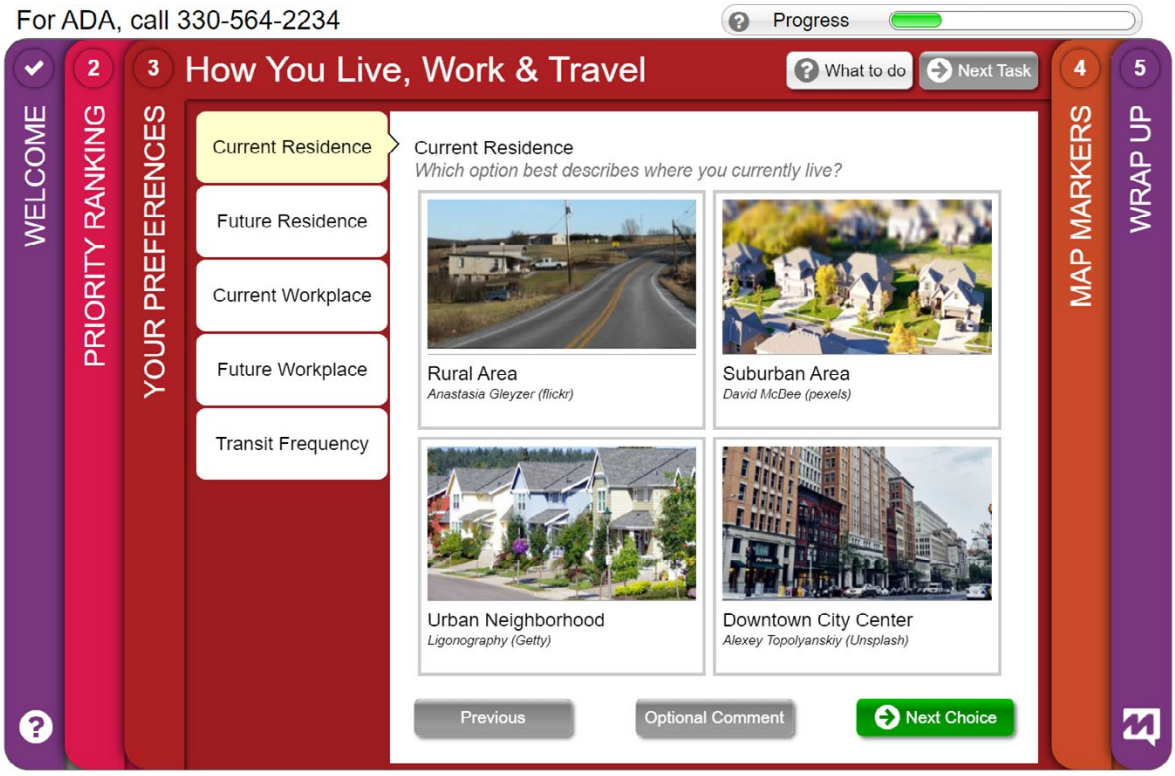
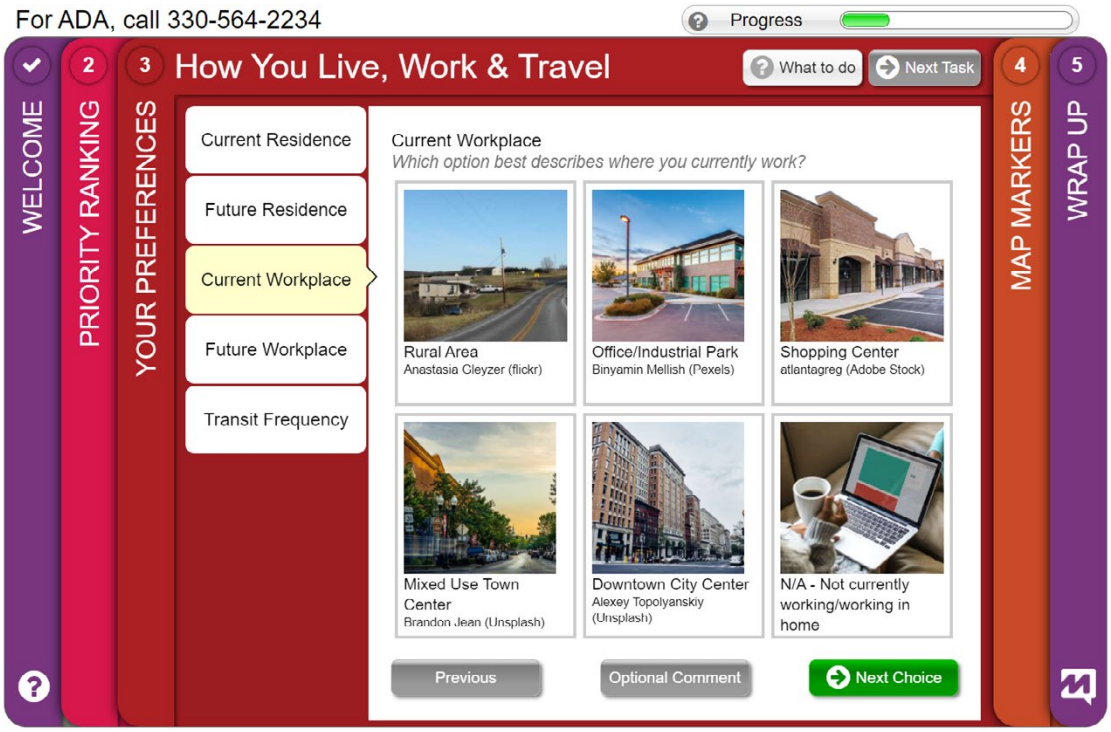


Figure 4-9: Online Survey - Workplace Setting (Future Workplace question shares the same choices)



Most survey respondents currently live in an urban neighborhood, with suburban areas being the next highest response. The future residence question, however, saw a significant shift where percentage of respondents who want to live in urban neighborhood were lower than those who want to live in a suburban area (Figure 4-10). Reviewing responses to these questions from the standpoint of people who live in each of the four settings reveals (Figure 4-11) that suburban residents were the most satisfied with their current living arrangements, with 77% of suburban residents indicated that they saw themselves living in the suburbs in ten years. By contrast, only 36% of rural residents foresaw themselves living in a rural area in ten years. Among downtown residents, 55% predicted that they would be living in a downtown area in ten years, while 62% of urban neighborhood residents said that they would remain urban residents. Both rural and urban neighborhood residents chose the suburbs as their second choice after their present arrangement, while downtown residents were equally likely to select an urban neighborhood or the suburbs as their destination in ten years.

Figure 4-10: Online Survey - Where Survey Respondents Live - Now and in Ten Years

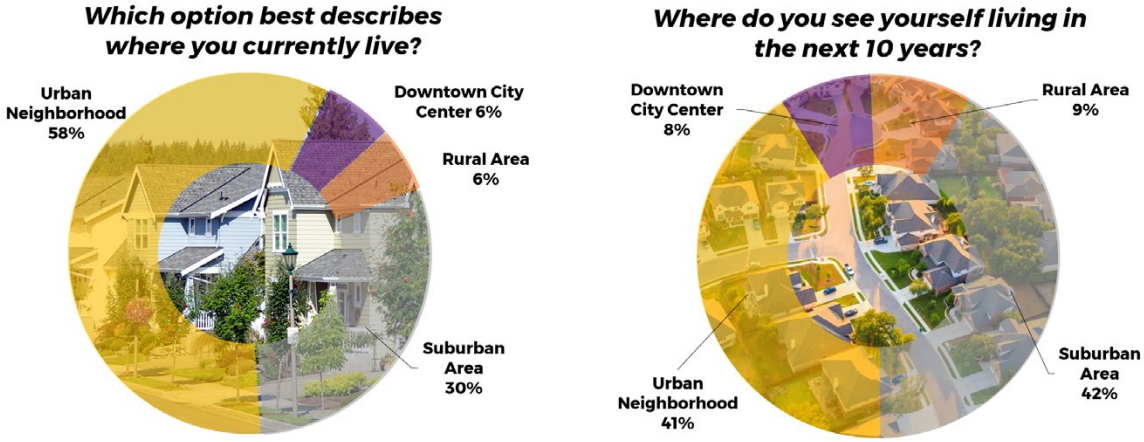
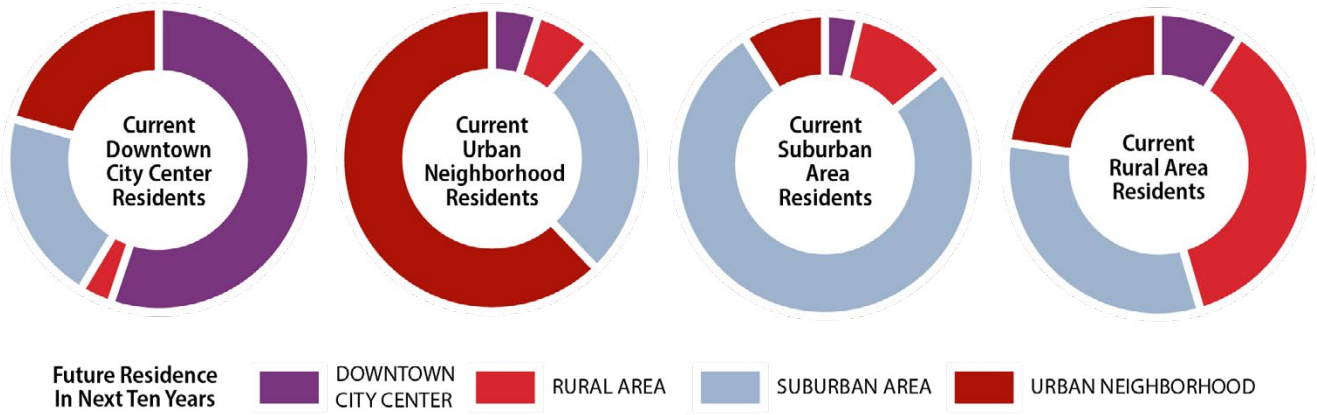


Figure 4-11: Online Survey - Where Respondents Live Now vs. Where They Want to Live in Ten Years



The responses to a similar question regarding current and future preferences for work location are summarized in Figure 4-12. The preference for desired future workplace location showed an increase in those who would like to work in an office or industrial park, and a slight increase in those who desire to work at in a mixed-use town center, rural area or shopping center. Examining where people working in each setting now see themselves working in ten years (Figure 4-13) found that those working in a downtown/city center were the most satisfied with their current arrangement (71%) followed closely by those working in an office or industrial park (66%), rural area (61%), mixed use town center (57%).

Only 45% of those currently working in a shopping center saw themselves working in the same setting in ten years, probably reflecting the role of retail work as entry level employment.

Similarly, more than half of those currently not working or working from home saw themselves working in a different setting in ten years, probably indicating that the respondent is unemployed and seeking employment (again, the survey was created, and mostly completed, before the onset of the COVID-19 pandemic). However, not working/working from home was the second choice, after the present arrangement, for respondents in most categories, probably reflecting impending retirement as well as a wish to work from home, a work arrangement that was far less common in early 2020 than it is today.

Figure 4-12: Online Survey - Where Survey Respondents Work - Now and in Ten Years

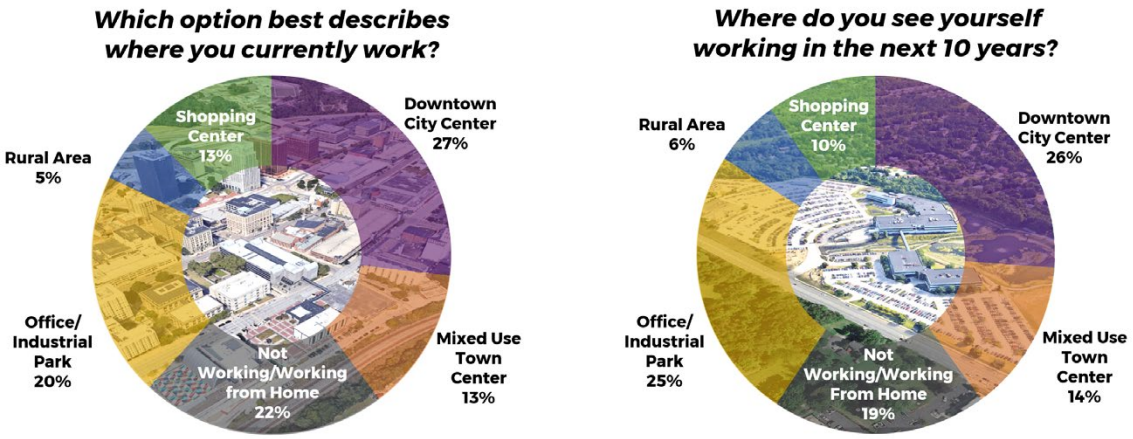
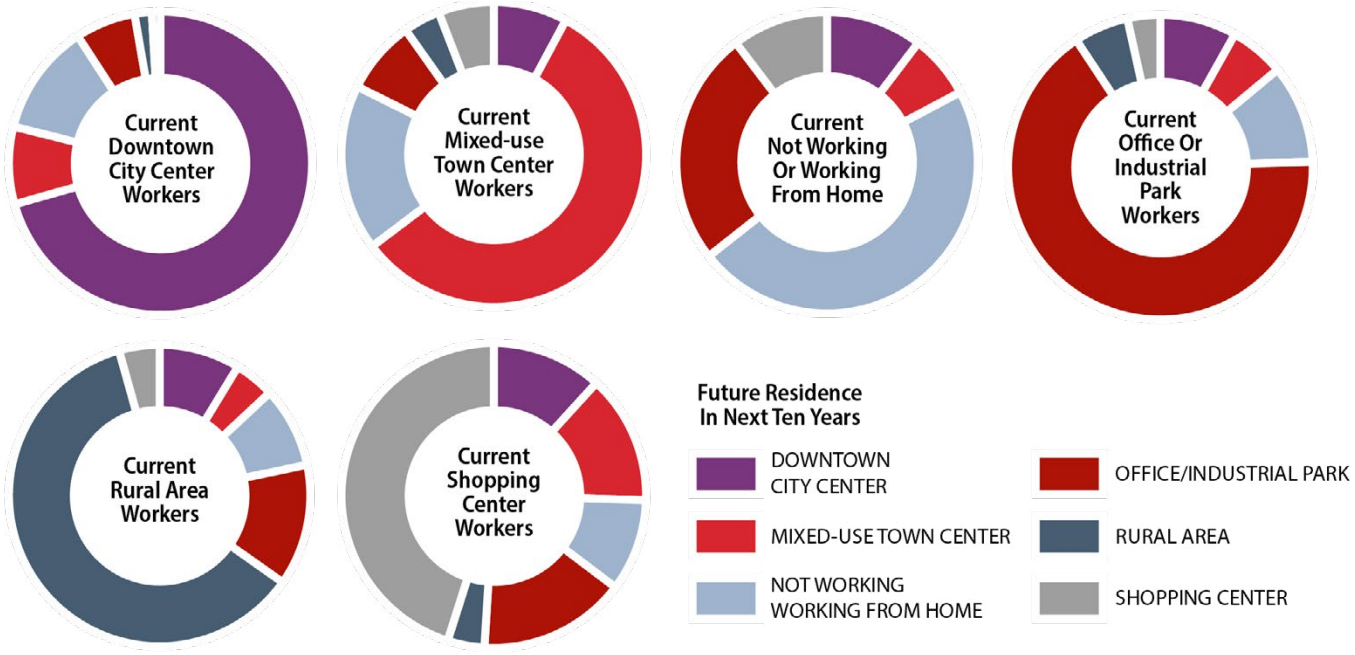


Figure 4-13: Online Survey - Where Respondents Work Now vs. Where They Want to Work in Ten Years



The survey also asked whether the respondent preferred more frequent bus service or more coverage. (Figure 4-14). When given the choice between a frequent bus network and one that provides coverage, 65% of respondents chose the former (Figure 4-15). Frequent service focuses on high-demand corridors with buses coming at least every 15 minutes and is supported by some less frequent routes. Coverage service spreads the service more evenly over the whole service area, which results in lower frequencies, but more fixed route bus stops closer to people's homes and destinations.

Figure 4-14: Online Survey - Frequency vs. Coverage Question

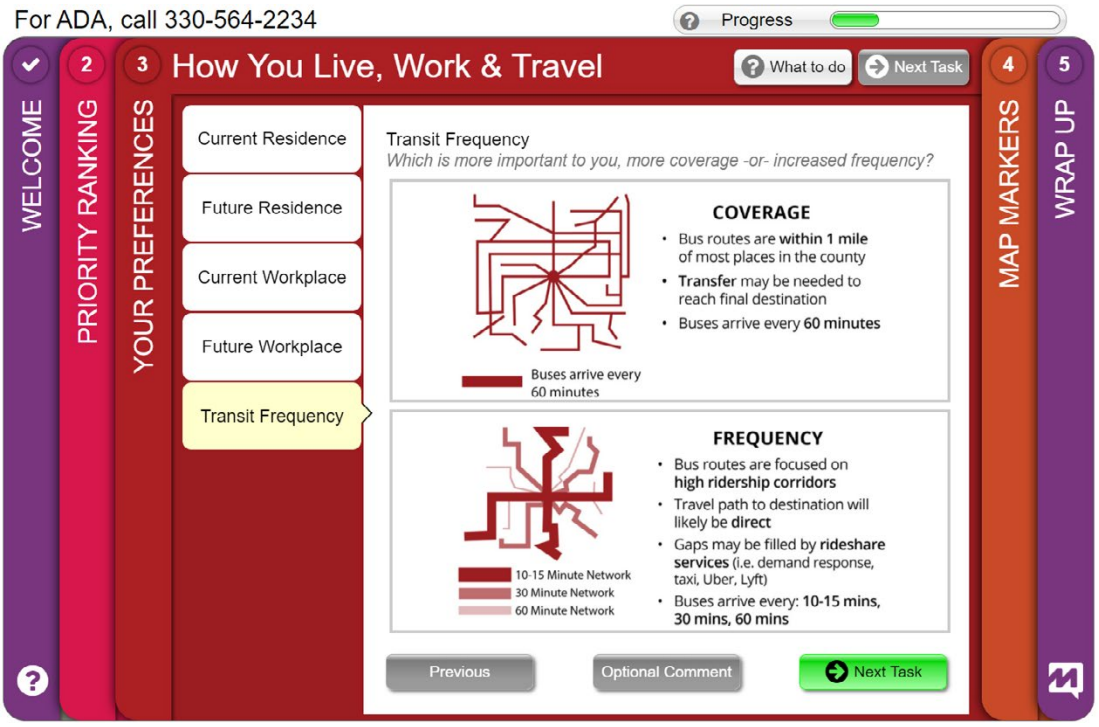
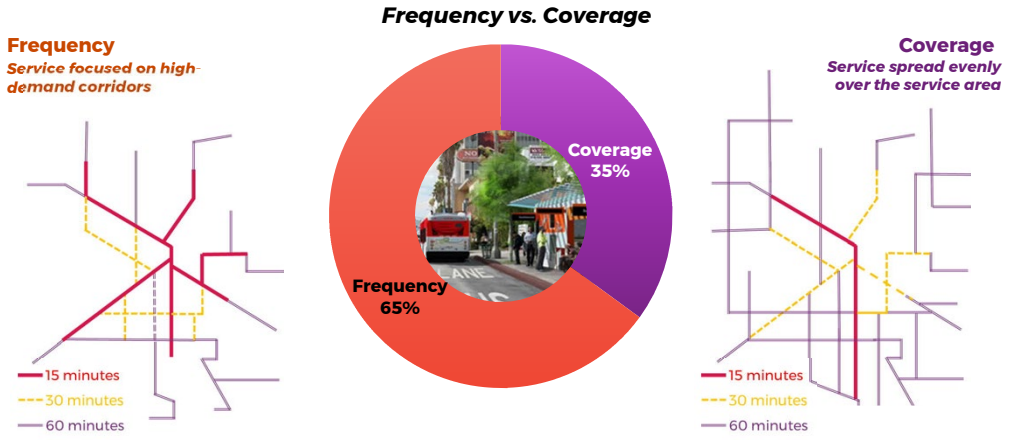


Figure 4-15: Online Survey - Frequency vs. Coverage



Finally, respondents were asked to mark on a map where they live, work, go to school, shop, dine out, or go for entertainment (Figure 4-16). For all respondents, most (72%) of the markers placed by survey respondents are located within ¼- mile of at least one METRO bus stop. When looking specifically at the responses from non-METRO users, 65% of destinations marked are within ¼ mile of a METRO bus stop. A map of the responses Is shown in Figure 4-17.

Figure 4-16: Online Survey - Map Markers

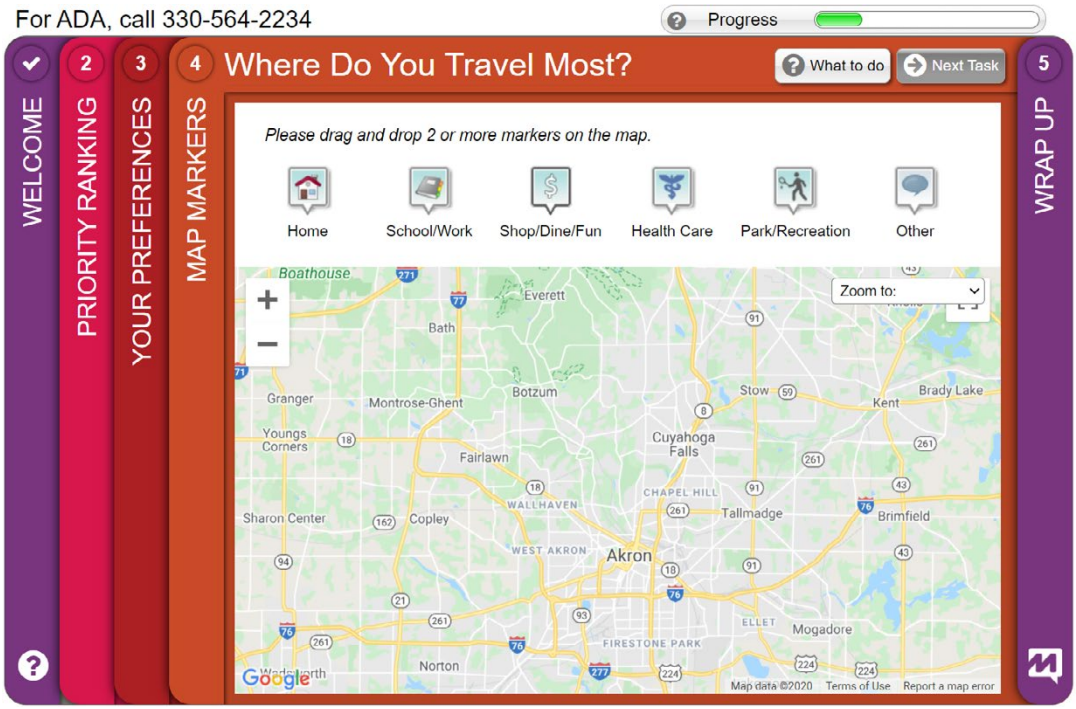
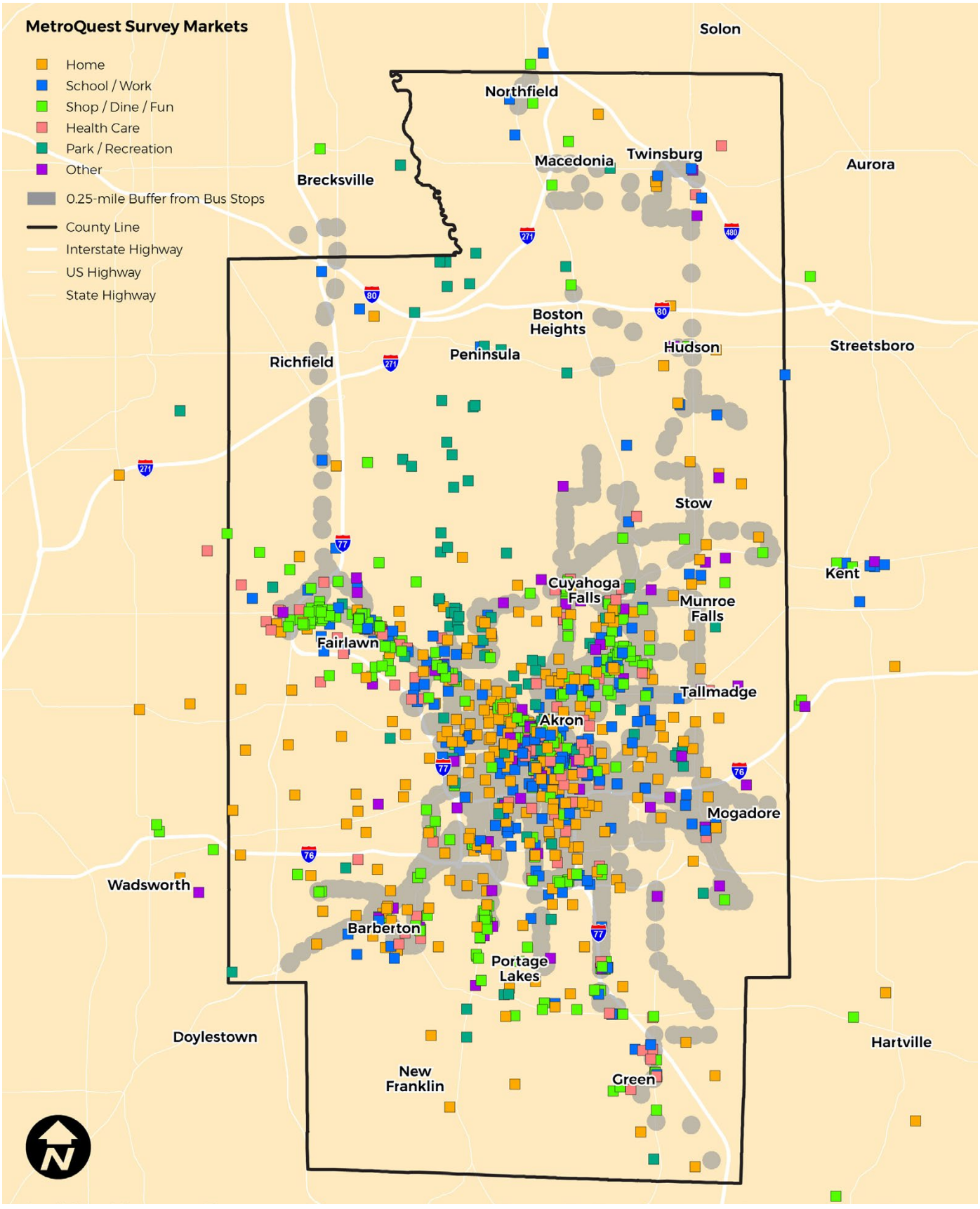


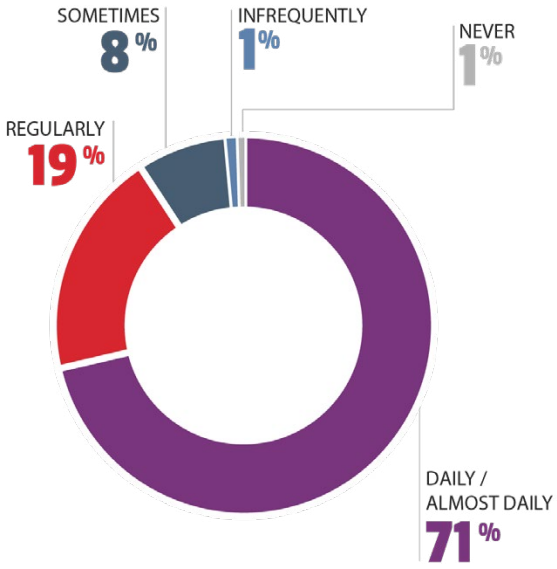
Figure 4-17: Online Survey - Markers



Other Public Outreach Surveys

METRO conducted a brief survey with passengers during the public outreach event at RKP Transit Center on March 10, 2020. Surveys were available on paper for passengers to fill out while they waited for their bus, or to take home and return later. Many were completed by members of the METRO team through interviews with passengers. A total of 218 surveys were completed during the event or received afterwards.

Figure 4-18: Passenger Survey - Transit Use



As shown in Figure 4-18, a large majority of survey respondents were frequent METRO riders. Over 90% of the respondents identified themselves as daily or regular transit users, about 8% indicated they sometimes use transit.

Figure 4-19: Passenger Survey - Favorable Feedback

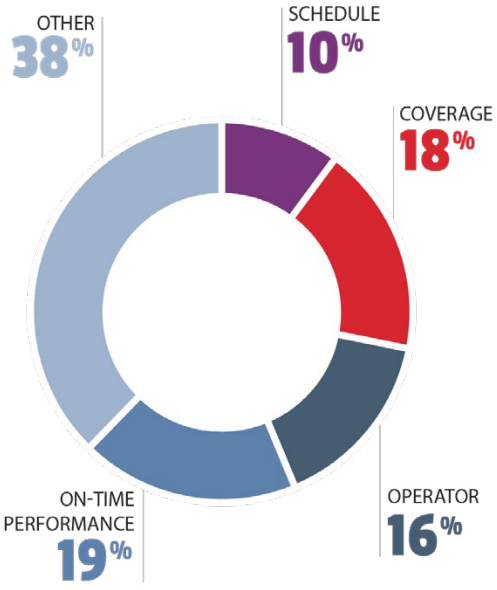
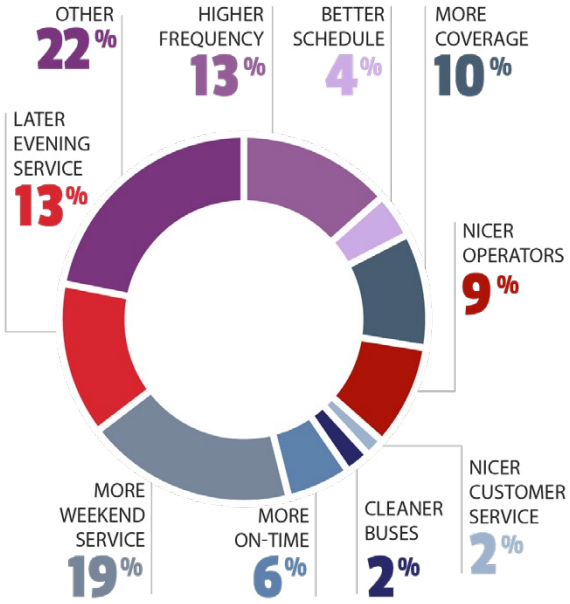


Figure 4-19 shows the how survey participants responded on which aspects of METRO's service were most favorable. Most of the comments in the "Other" category are generic praises for METRO. Some other favorable comments relate to comfort, the social aspect of transit, Wi-Fi on buses, and ability to go places without having to own personal vehicles.

Figure 4-20 shows which areas respondents indicated had room for improvement. Most respondents indicated they would like to see METRO expand their weekend service, by offering longer evening service, and higher service frequency.

Figure 4-20: Passenger Survey - Areas for Improvement



Other comments regarding what METRO customers would like to see include the following:

- Free fares or lower fares
- More direct routes
- Better infrastructure (e.g. shelters, charging outlets, etc.)

When asked about what METRO could become in ten years, responses centered around repeating and reinforcing previous responses about what they like about METRO service now, or what could be improved in the future. Other comments indicated a desire for door-to-door new mobility or microtransit types of service. Others mentioned high frequency, 24-hour service, and connections to cities and locations in adjacent counties.

4.1.3 On-Board Survey

The On-Board Survey was conducted between mid-January 2020 and early February 2020. The survey yielded valuable information on riders' travel and use patterns, trip patterns and demographics.

> Responses were collected from 1,900 METRO riders, including representative samples of passengers on every METRO fixed-route, on every trip and during every time period that METRO operates.

Completed just before the onset of the COVID-19 pandemic, the survey is the most thorough documentation of METRO's pre-COVID customer base and their travel patterns, and provides METRO with a vast trove of data for use in future projects and planning efforts. A detailed report of the survey methodology, instrument and results can be found in Appendix 2. A summary of the results is provided below.

Who Rides METRO?

Figures 4-21 to 4-27 summarize the demographic, employment and economic information collected during the survey.

Figure 4-21: Employment Status of Survey Respondents (those who identified themselves as "not a student", 78% of all riders)

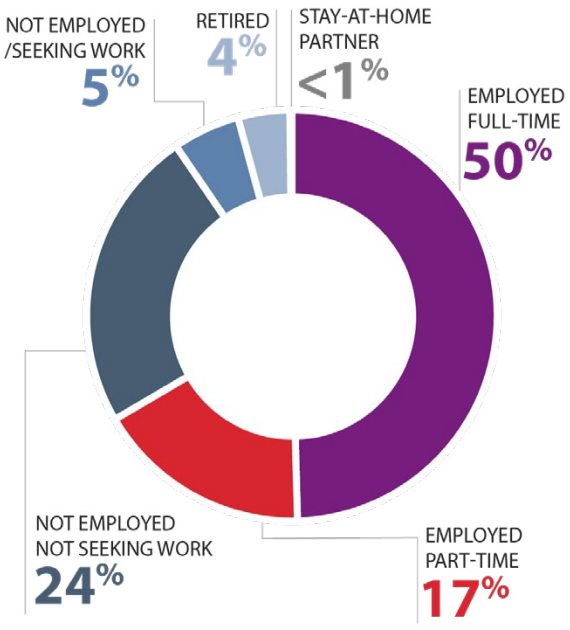


Figure 4-22: Student Status of Survey Respondents (22% of all riders who identified themselves as "a student")

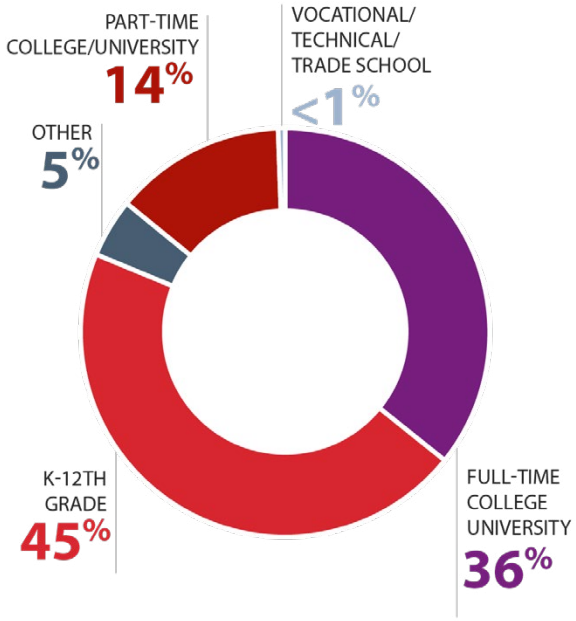


Figure 4-23: Age of Survey Respondents

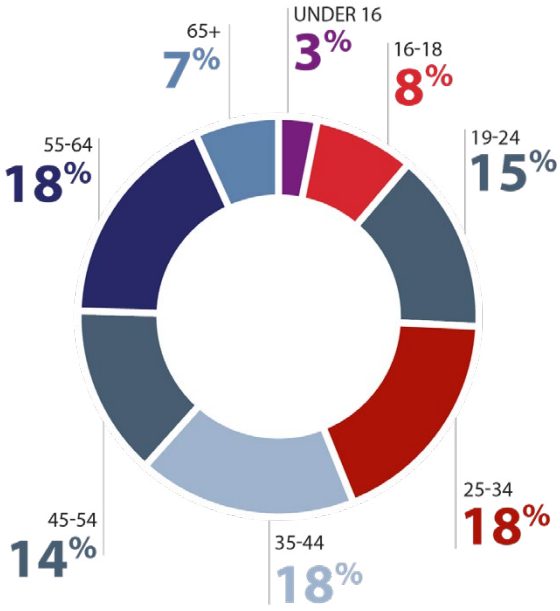


Figure 4-24: Gender of Survey Respondents

Male Riders	Female Riders
57%	43%

Based on the on-board survey, 52% of METRO passengers are Black or African American, 41% are white, 1% are Hispanic / Latino, 1% are Asian, and 5% are other races or ethnicities. As noted in the Chapter 3, this ethnic composition differs greatly from that of Summit County, in which about 16% are African American, and nearly 80% are white. As shown in Figure 4-26, nearly all respondents (96.5%) indicted their national origin as American.

Of riders who responded, 91% of METRO passengers report an annual household income below $50,000 with 76% below $30,000.

As in the area of race and ethnicity, the survey response indicates that METRO customers are atypical of Summit County residents, who had a median annual household income of $ 54,533 in 2018.

Figure 4-25: Race of Survey Respondents

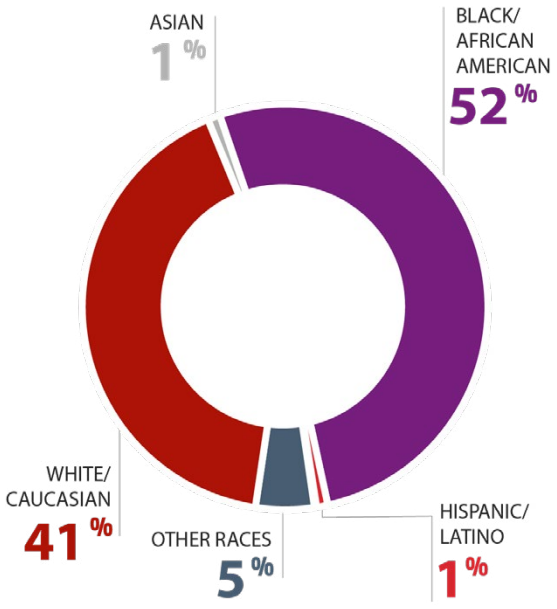
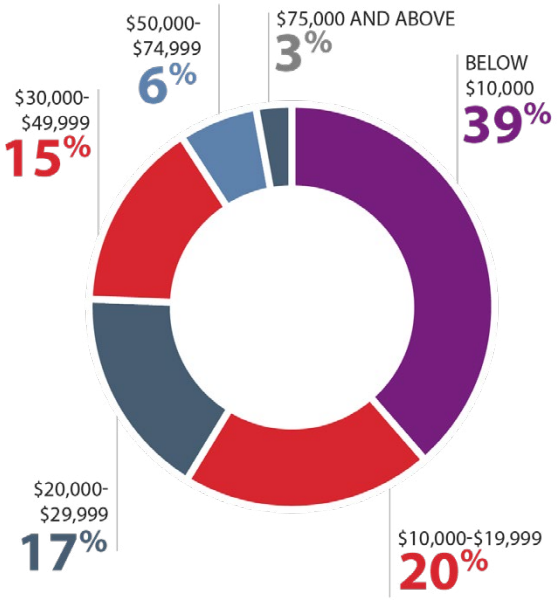


Figure 4-26: National Origin of Survey Respondents

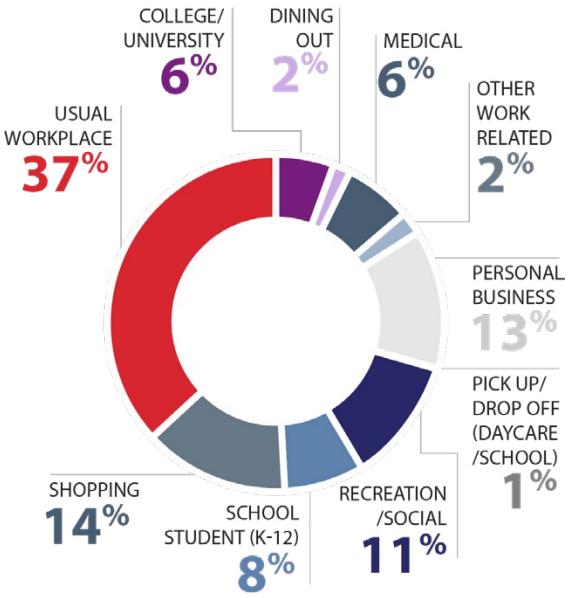
Figure 4-27: Income of Survey Respondents (exclude "refused to answer")



What are METRO Riders' Trip Purposes?

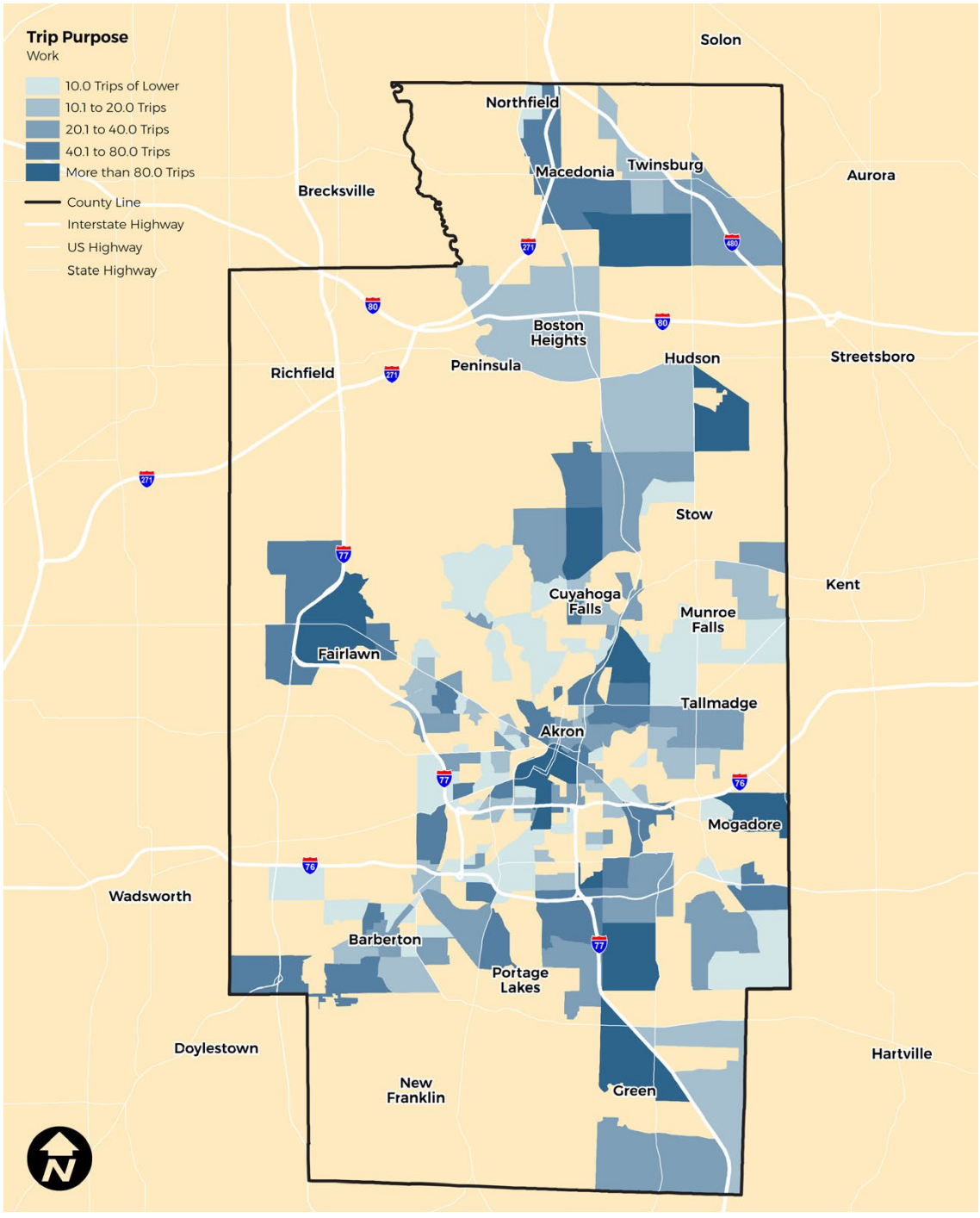
Figure 4-28 shows the percentage of trip purpose, organized into ten categories based on the types of destinations. For trips that were destined at "Your HOME", the trip origins were used as the trip purpose. Work trips were the most common trip purpose at 39%.

Figure 4-28: Trip Purpose of Survey Respondents



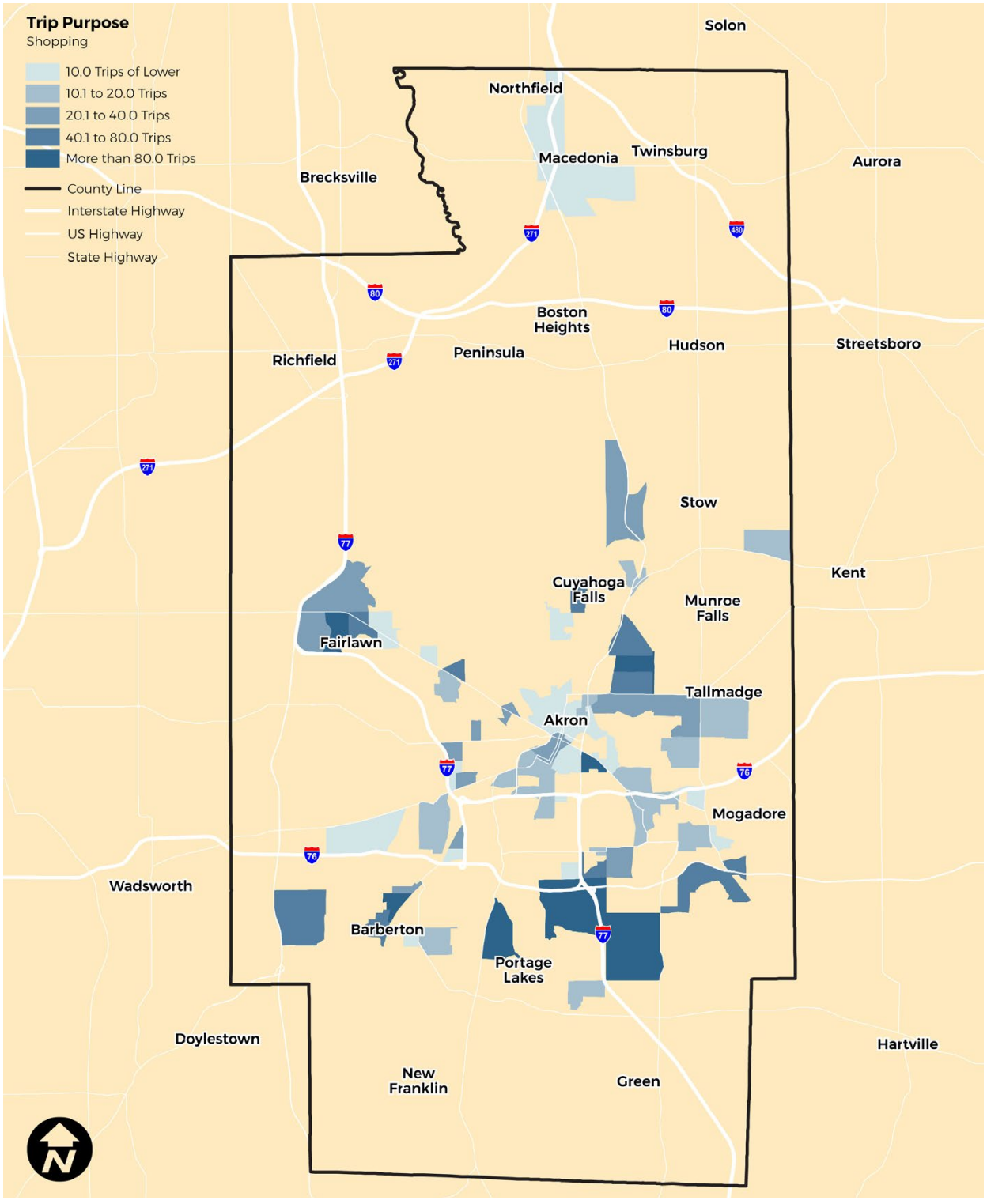
Figures 4-29 through 4-33 show the geographical distribution of these trip destinations (or origins if a trip ended at "home), aggregated by Census block group. As Figure 4-29 indicates, fixed-route work trips are widely distributed throughout the county, with concentrations in downtown Akron, in Cuyahoga Falls, Fairlawn, Green, Hudson, Macedonia-Twinsburg, Mogadore, and many other areas. Many of the areas outside downtown Akron that receive more than 80 trips – south of Twinsburg, north of Cuyahoga Falls, Fairlawn, Mogadore, and Green - also saw more than 10% increase in employment over the past 15 years, as indicated in the analysis of job growth in Chapter 3. However, nearly all of the areas with higher than 40 trips outside of downtown Akron, except Fairlawn and parts of Cuyahoga Falls, have very low employment density (less than 5 jobs per acre). Areas with widely dispersed jobs can be difficult to serve efficiently with fixed-route transit.

Figure 4-29: Trip Purpose - Places of Work of Survey Respondents



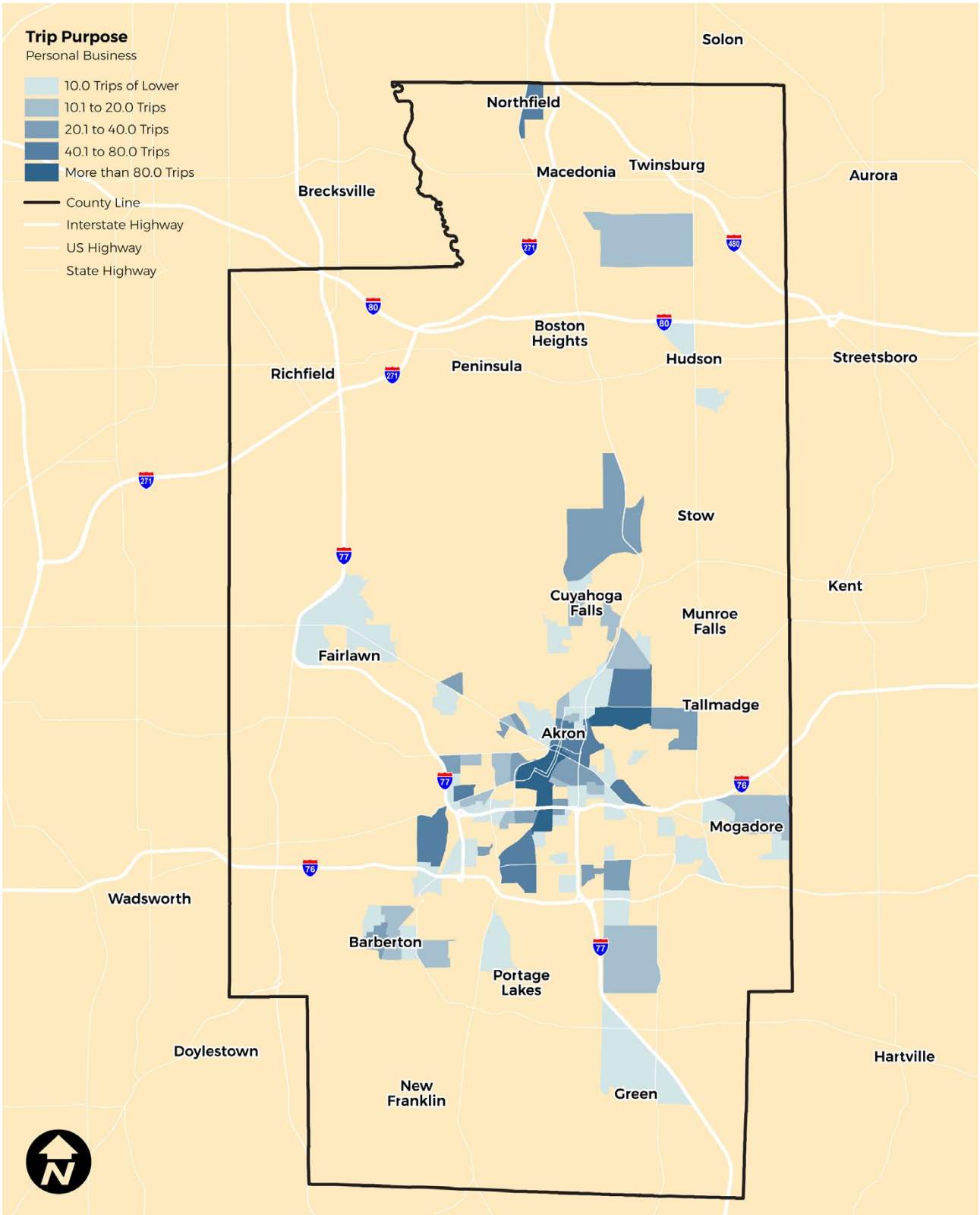
Shopping trip destinations, shown in Figure 4-30, are more concentrated than work trips, and are focused on a limited number of larger grocery stores, big box discount department stores, and malls that are easily accessible using public transit. Some of the highest concentrations of trips are in the retail areas around Walmart Supercenters, in Cuyahoga Falls, Green and Montrose. The lower levels of trips to the shopping area in Macedonia, in the north of the county, which includes a Walmart Supercenter, probably is related to the lower level of transit service to that area.

Figure 4-30: Trip Purpose - Places of Shopping of Survey Respondents



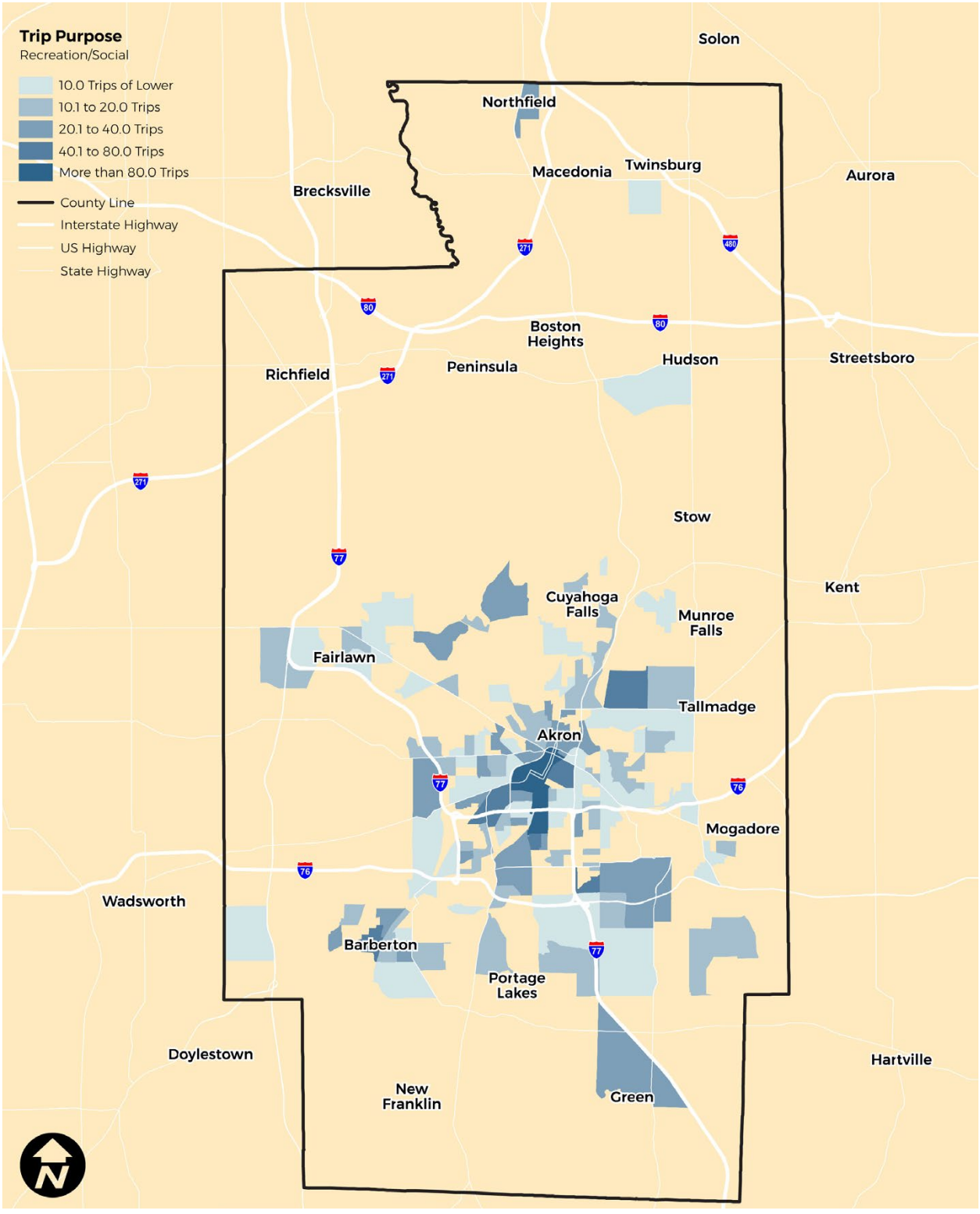
Destinations for personal business (in Figure 4-31) are concentrated in and around downtown Akron, where many banks and government agencies have offices, and to some of the shopping area destinations identified in Figure 4-30.

Figure 4-31: Trip Purpose - Places of Personal Business of Survey Respondents



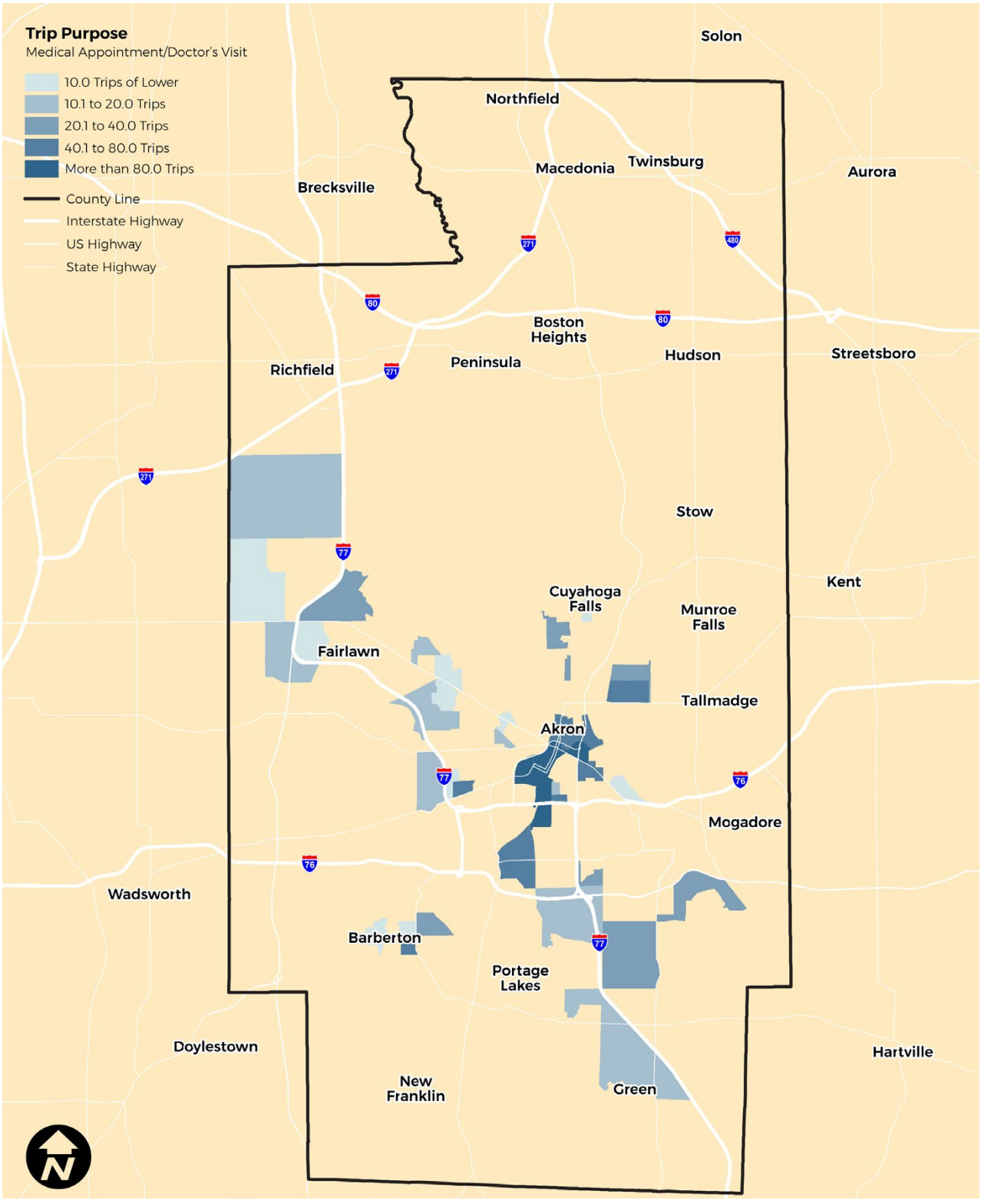
Destinations for recreation purposes are primarily concentrated in Akron and in closer in suburban areas in Barberton, Cuyahoga Falls, Fairlawn, Green, and Tallmadge (Figure 4-32). Some locations indicated on the map are sites of specific entertainment venues, such as movie theaters in Green, Hudson, Montrose, Cuyahoga Falls and Macedonia, and the MGM Northfield Park Casino in Northfield.

Figure 4-32: Trip Purpose - Places of Recreation/Social of Survey Respondents



Medical trips are highly concentrated around the hospitals in and around downtown Akron and in places with concentrations of medical offices and clinics (including dialysis clinics) in Akron, Barberton, Cuyahoga Falls, Fairlawn/ Montrose, Green, and Tallmadge (Figure 4-33).

Figure 4-33: Trip Purpose - Places of Medical Appointment/Doctor's Visit of Survey Respondents



Residential Origins of Work Trips

Figures 4-34 through 4-39 show work trip origins for METRO's fixed-route service that serve Summit County's largest and growing job hubs other than the City of Akron. Trips are aggregated at the Census block group level. The number of trips destined for Barberton and Cuyahoga Falls are orders of magnitude higher than those going to northern Summit County (Hudson, Macedonia, and Twinsburg). This likely is the result of the lower frequency and less convenient service to the northern Summit County area. Northern Summit County has seen significant job growth in recent years, but the areas low development density and great distance from downtown Akron make it challenging for METRO to serve efficiently.

Some of the seemingly short trips, such as the one from Portage Lakes to Barberton (Figure 4-34), would take much longer using METRO's service than driving, because a transfer is needed in downtown Akron to complete the trip. Because of the constraints in service availability, METRO customers likely lose out on job opportunities or are at a significant disadvantage compared to drivers when seeking employment in the county.

Figure 4-34: Origins of Work Trips of Survey Respondents to Barberton

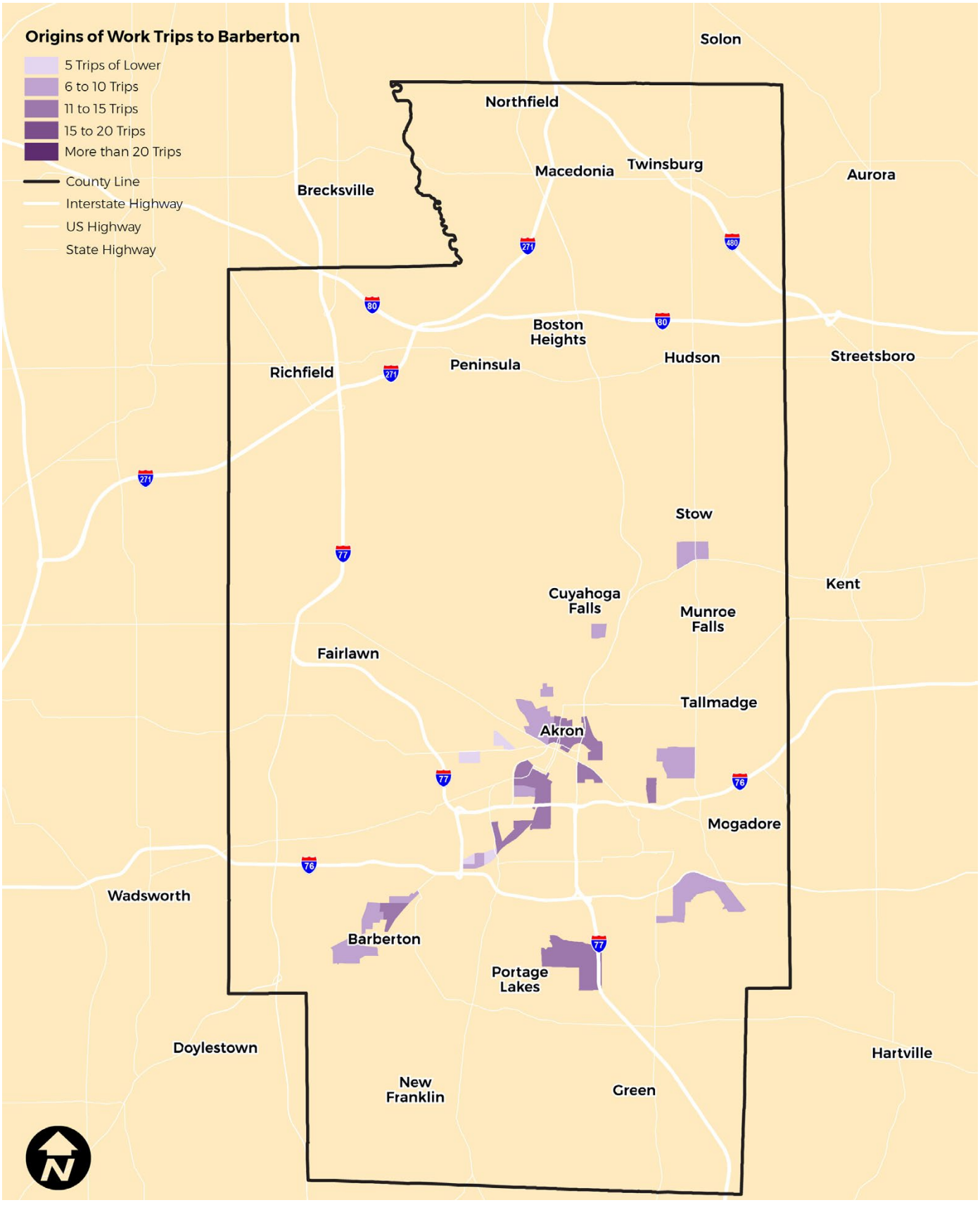


Figure 4-35: Origins of Work Trips of Survey Respondents to Cuyahoga Falls

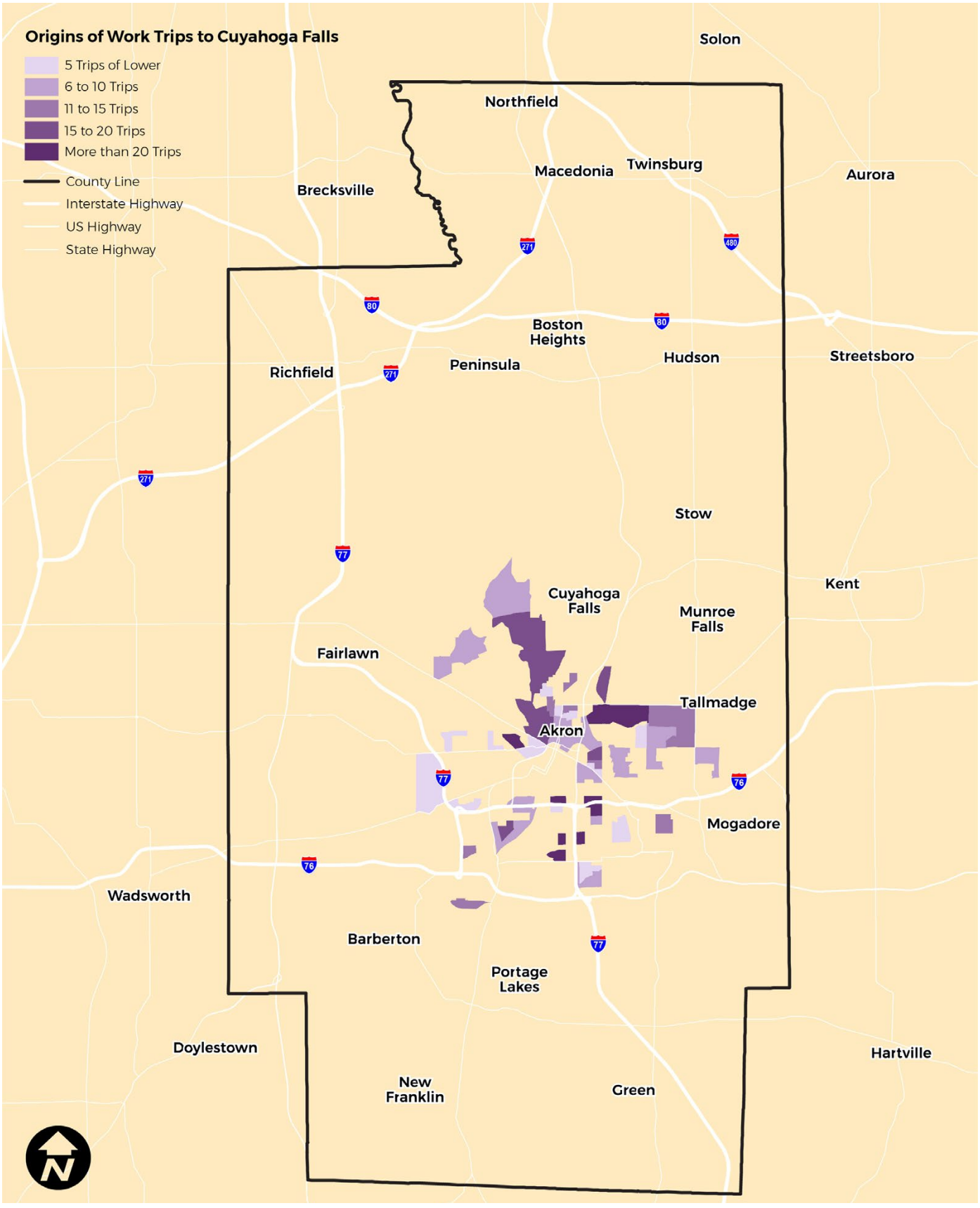


Figure 4-36: Origins of Work Trips of Survey Respondents to Fairlawn

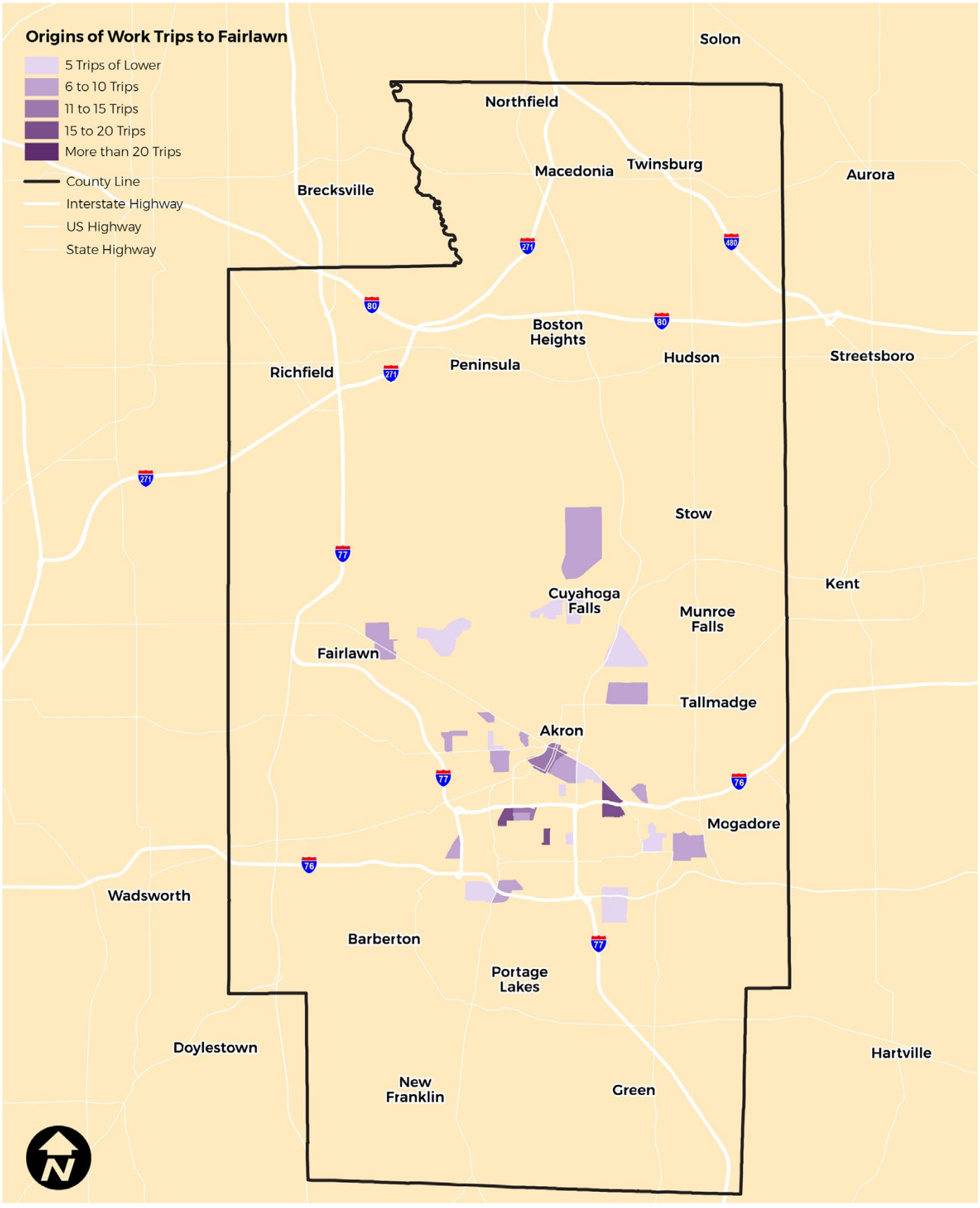


Figure 4-37: Origins of Work Trips of Survey Respondents to Hudson

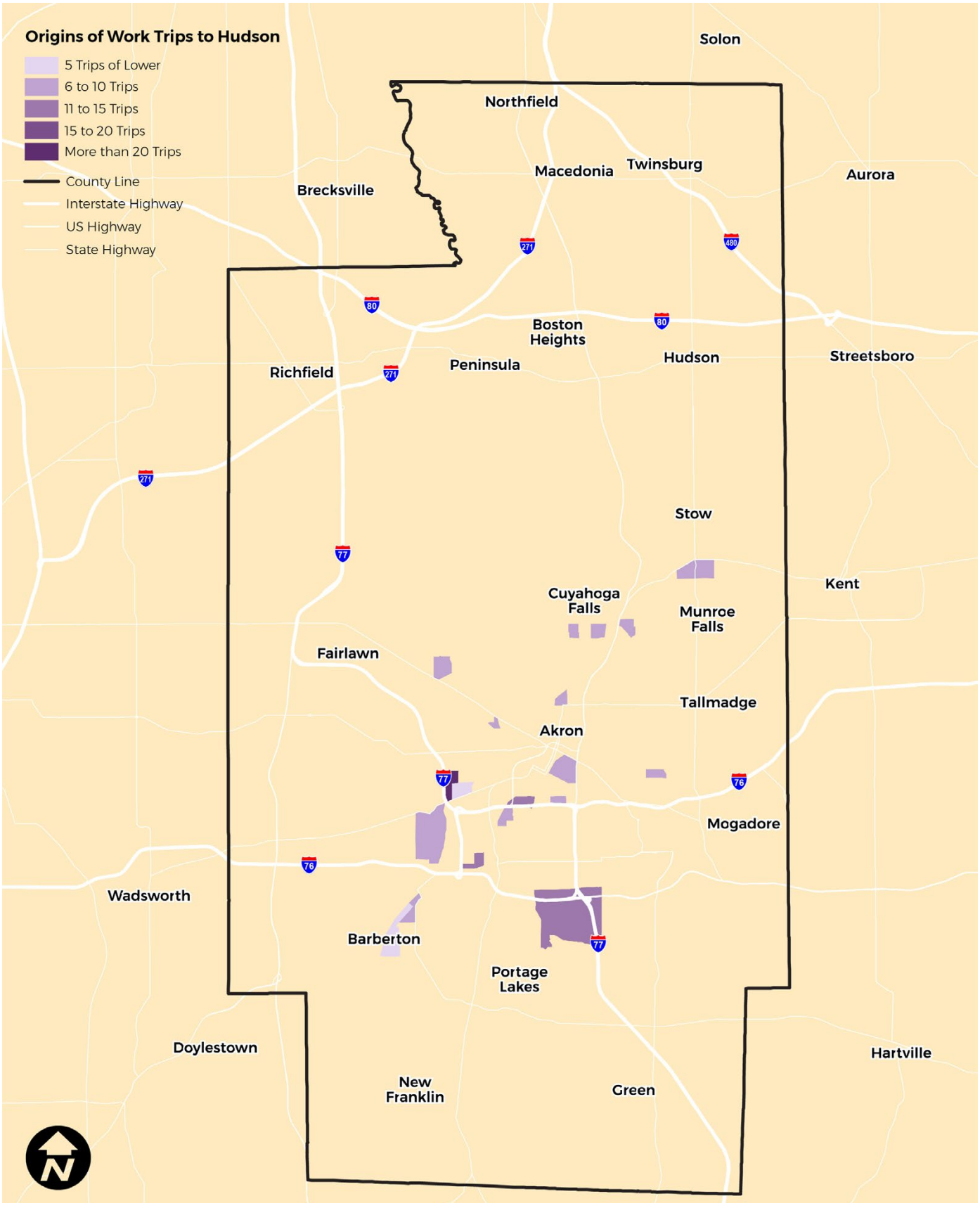


Figure 4-38: Origins of Work Trips of Survey Respondents to Stow

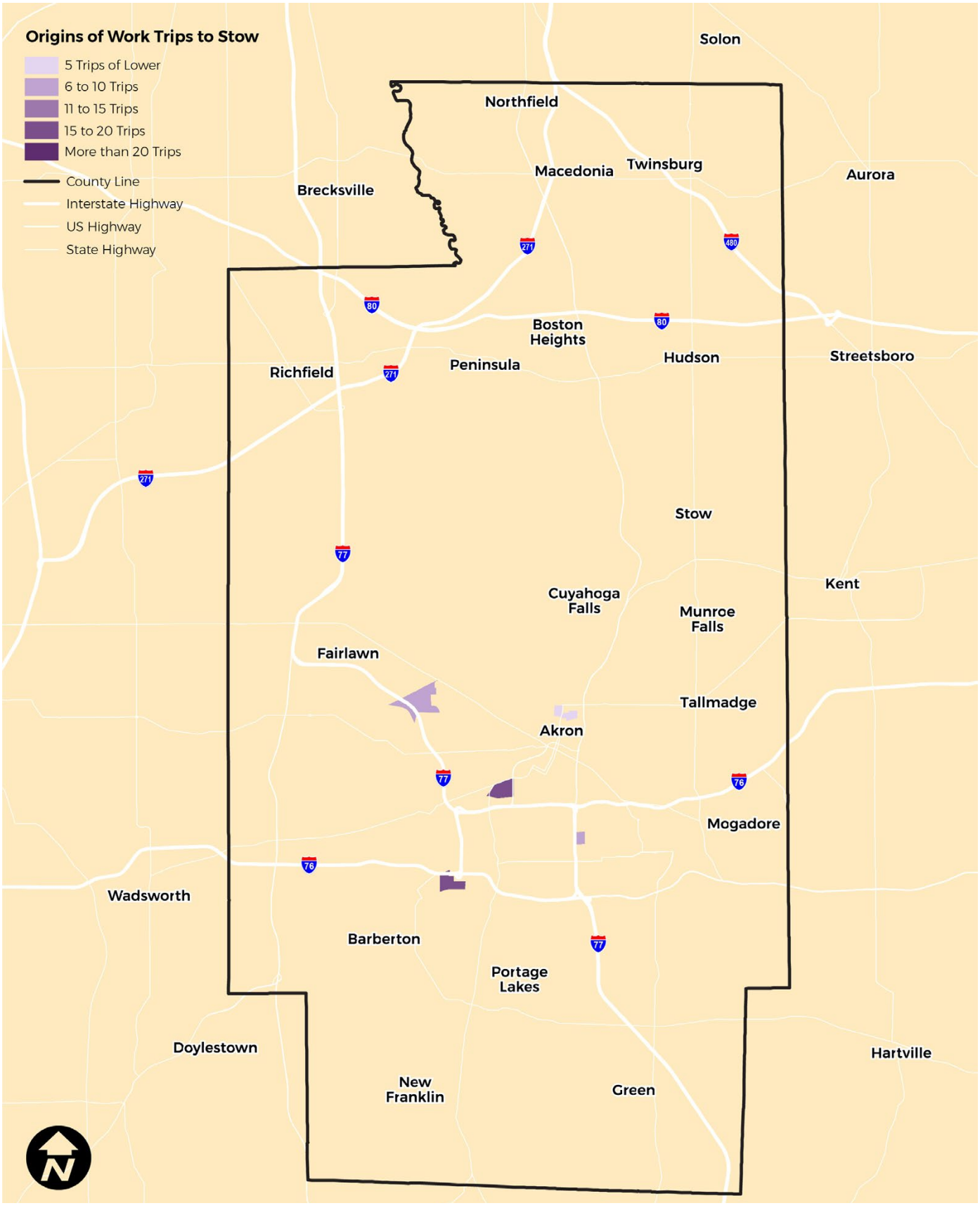
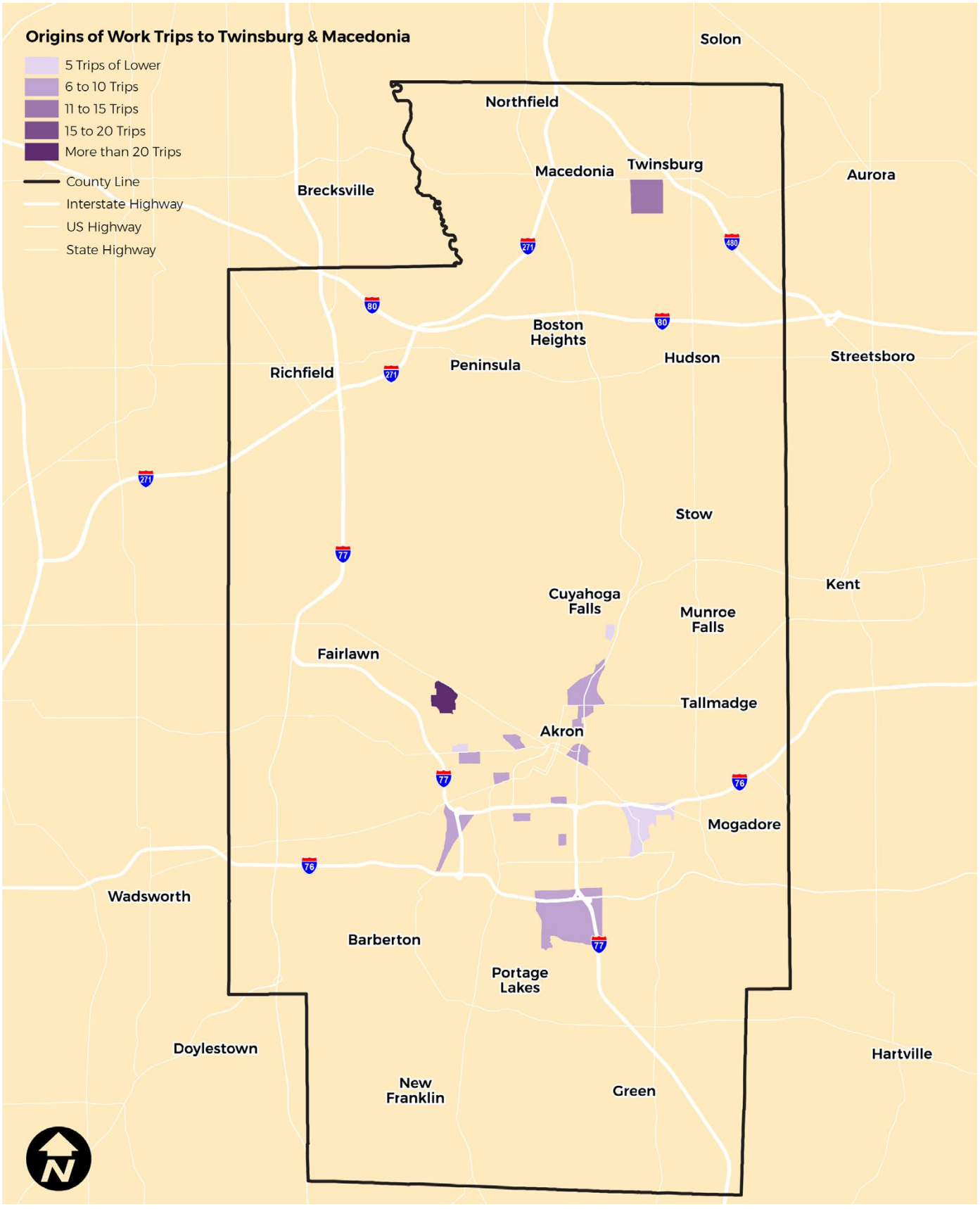


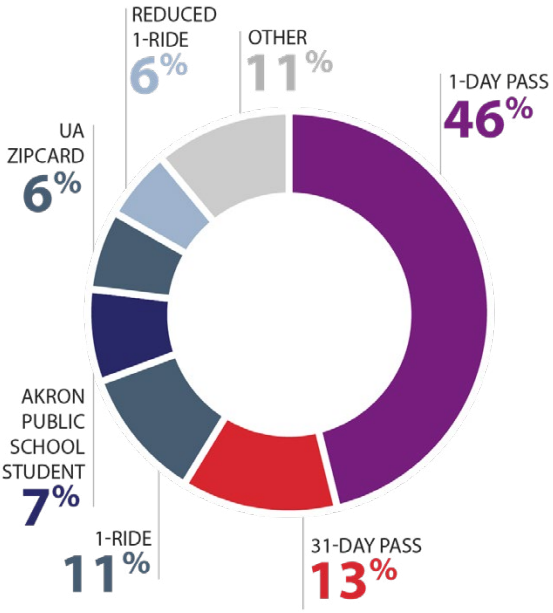
Figure 4-39: Origins of Work Trips of Survey Respondents to Twinsburg and Macedonia



How Do People Pay for Their METRO Trips?

The on-board survey also collected information on how customers pay fares. Figure 4-40 below shows the percentage of each fare type used by survey respondents. Almost half of all fares are paid by a one-day pass (46%).

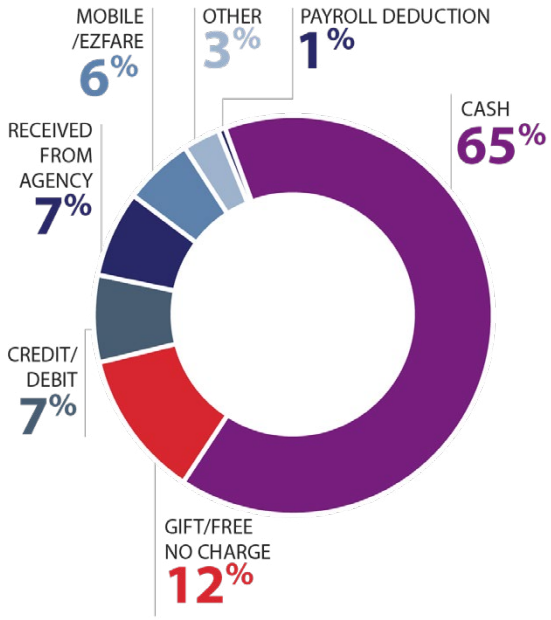
Figure 4-40: Type of Fare Used by METRO Riders Who Responded to the Survey



This is not surprising given that METRO does not offer free transfers between routes, and the cost of a one-day pass (with unlimited rides for the day) is the same as the cost of two single rides. Akron Public school passes and University of Akron ZipCards represent a combined 13% of all boardings, indicating a significant impact on METRO ridership when school is not in session. METRO's weekly pass (7-day pass) is the least popular pass product, only used by 3% of the survey respondents; the limited use of the 7-day pass is consistent with low usage levels at other transit systems.

Figure 4-41 shows the payment methods used to purchase fares. 65% paid with cash and 12% paid no fare (likely representing the school ID programs which are paid for through a contract with the schools themselves and not directly to METRO by the student). Only 6% of trips were paid for using the EZFare mobile ticketing application. Remaining categories are shown below.

Figure 4-41: Type of Payment Used by METRO Riders Who Responded to the Survey



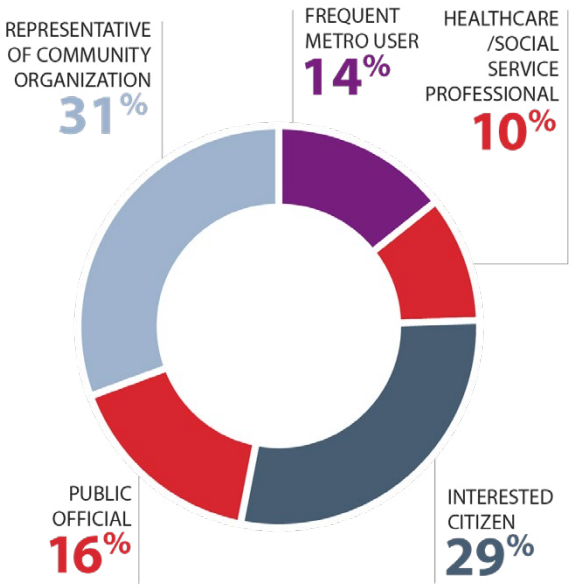
4.1.4 Second Round of Public Outreach (September 2020)

To adapt to the restrictions brought by the COVID-19 pandemic, METRO developed and hosted two online interactive public meetings using the Zoom video conference platform. The team held two live webinars, the first on Wednesday, September 23, 2020, the second on Tuesday, September 29, 2020. The webinars allowed the team to present the results of the analyses and the preliminary recommendations for the next 10 years. Participants were able to provide their feedback through an interactive survey and encouraged to ask questions in a live Question and Answer session. A total of 48 persons attended the two live webinars. In addition, as of October 26, 2020, the recording of the September 23rd webinar was viewed 85 times on YouTube. The link was provided on the METRO website and the webinar can be viewed here: https://youtu.be/KwvnUxeI_x4

The webinar attracted a variety of attendees, including local and state officials, business owners, representatives of non-profit organizations, and concerned citizens (Figure 4-42). Several polls were conducted during the live webinar to capture audience opinions on the strategic planning recommendations. When asked if they agree with the direction of the plan, 87% expressed support for the plan (Figure 4-43). Questions raised during the Q&A session at

the end of the webinar were mainly focused on reinforcing and expanding connections to key destinations, such as the airport and community centers, as well as how the plan will address social justice and equity issues facing the Summit County community.

Figure 4-42: Webinar Participants



For those who were not able to participate in the public outreach webinars, METRO contacted 5,000 registered customers in their SCAT programs by mail in September 2020 indicating that paper copies of the presentation were available upon request. Nearly 150 customers made the request and were sent a copy of the presentation and a brief survey, to be returned by self-addressed stamped envelope. As of October 26, 2020, 41 completed surveys were returned. When asked if they agree with the direction of the plan, 68% expressed support for the overall direction of the plan and the plan recommendations; about 17% were unsure, and 15% were not in favor of the plan's direction (Figure 4-44). Respondents also mentioned that they would like the demand response service to be available for longer hours, be less restrictive, and remain accessible for those who cannot use modern technologies. A few responses also expressed preference on the fixed-route services as opposed to demand responses services, for the convenience of not having to schedule and reserve their trips in advance.

Figure 4-43: Webinar Audiences' Answers to Question "Do you agree with the direction of the strategic plan?"

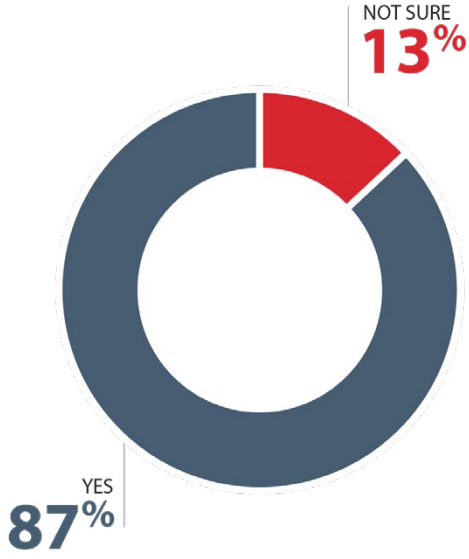
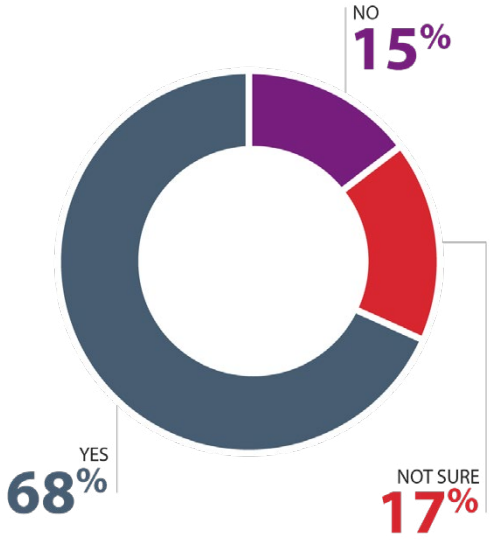


Figure 4-44: SCAT Users' Answers to Question "Do you agree with the direction of the strategic plan?"



4.1.5 Project Web page and METRO Website

Throughout the duration of the project, general information, links to project surveys, presentations and deliverables were made available on a dedicated page within METRO's existing web site. The link to the project web page was distributed with public engagement materials. This facilitated delivery of frequent, timely update on the progress of the Strategic Plan. Since February 2020, the Strategic Plan webpage was viewed more than 500 times.

4.2 Stakeholder Outreach

4.2.1 Key Stakeholder Interviews

Stakeholders include top appointed and elected government officials, leaders of the business community, and other community leaders. Input and support from these leaders are critical to the plan's success, to METRO's full integration into the community's plans and development strategies, and to METRO meeting transportation needs and creating opportunities for the community. The team utilized existing relationships and previous contacts that METRO has created within the community to gather input and build support for the plan. One-on-one interviews and small group meetings were conducted by the team to reach individuals in this group to collect information and to convey to these stakeholders the importance that METRO places on their input, support and participation in METRO's ongoing development. In addition to one-on-one and small group meetings, METRO also participated in a variety of regularly scheduled meetings including chambers of commerce, community organizations and governing boards.

Table 4-4: Stakeholder Interviews

Public Agency, Municipality or Governing Body	Attendees	Date(s)
City of Barberton	Mayor Bill Judge	Feb. 18, 2020
	Trevor Hunt, Planning Director (Sept. only)	Sept. 15, 2020
City of Cuyahoga Falls	Mayor Don Walters	Feb. 19, 2020
	Diana Colavecchio, Director of Community Dev. (Feb. only)	Sept. 2, 2020
City of Akron	Mayor Dan Horrigan	Mar. 2, 2020
	James Hardy, Deputy Mayor for Integrated Dev.(Sept. Only)	Sept. 21, 2020
	Jason Segedy, Dir. of Planning and Urban Dev. (Sept. Only)	
	Tamiyka Rose, Health Equity Ambassador (Sept. Only)	
City of Stow	Mayor John Pribonic	Feb. 18, 2020
	Rob Kurtz, Director of Planning and Development	Sept. 9, 2020
County of Summit	County Executive Ilene Shapiro	Feb. 26, 2020
	Brian Nelsen, County Executive Chief of Staff	Sept. 14, 2020
	Greta Johnson, Asst. Chief of Staff/Communications	
	Diane Miller-Dawson, Director, Finance & Budget	
	Connie Krauss, Director, Community & Econ. Dev. (Feb. Only)	
	Bryan Herschel, PM, Community & Econ. Dev. (Feb. Only)	
	John Robinson, Community & Economic Dev. (Feb. Only)	
	Whitney Spencer, Senion Administrator (Feb. Only)	
	Terri Burns, Director, Job & Family Services, (Sept. Only)	
Akron Metropolitan Area Transportation Study (AMATS)	Curtis Baker, Executive Director	Feb. 27, 2020
	Heather Reidl, Mobility Planner	Oct. 28, 2020
	Dave Pulay, Transportation Engineer (February only)	
	Jeff Gardner, Transportation Planner	
	David Swirsky, Planner (October only)	
Akron City Council	Councilmember Shammas Malik, Ward 8	Feb. 19, 2020

Similar to the public outreach strategy, meetings with stakeholders were held at both the beginning of the plan and after the draft recommendations were developed. All stakeholders were invited to participate in the public webinars held in September 2020, and many attended as shown in Figure 4-44 in the previous section.

Table 4-4 shows the one-on-one or small group stakeholder meeting dates, attendees and represented organizations. Attendees from METRO included the Chief Executive Officer, Board of Trustees President, and Director of Planning and Strategic Development.

Table 4-5 shows the additional meetings that METRO attended to share information about the plan.

Table 4-5: Stakeholder Meetings

Meeting	METRO Participation	Date
Fairlawn Area Chamber	Table w/ flyers	Feb. 10, 2020
Elevate Greater Akron BRE Committee	Presentation	Feb. 19, 2020
Greater Akron Chamber Board	Brief update	Feb. 20, 2020
Summit Lake Community Council	Brief Update	Mar. 2, 2020
Neighborhood Network (Middlebury/University Park)	Brief Update	Mar. 3, 2020
Richfield Area Chamber	Table w/ flyers	Mar. 4, 2020
AMATS Technical Advisory Committee	Brief Update	Mar. 5, 2020
Multi-Chamber Networking Events (Green and Fairlawn)	Table w/ flyers	Mar. 6, 2020
Twinsburg Chamber and Community Expo	Table w/ flyers	Mar. 7, 2020
Fairlawn Area Chamber	Table w/ flyers	Mar. 9, 2020
Akron City Council Ward 10 Meeting	Brief Update	Mar. 10, 2020
AMATS Policy Committee	Brief Udpate	Mar. 11, 2020
Conxus NEO Healthcare Sector	Brief Update	Mar. 19, 2020
Conxus NEO Manufacturing Sector	Brief Update	Mar. 26, 2020
AMATS Policy Committee	Brief Update	Sept. 24, 2020
Downtown Akron Partnership Executive Committee	Presentation	Oct. 15, 2020

A wide variety of feedback was garnered through the series of stakeholders meetings.

In the initial meetings held early in the project, some key themes echoed by the stakeholders included:

- **Enhance partnerships with communities and business partners**
  - Business partnerships for enhanced specialized services
  - Public art near stops
  - Employer pass programs
  - Special events and venues
- **How can METRO become more engaged with local planning processes and roadway projects?**
- **Integrate transit into economic development in a more deliberate way; be in the conversations around development earlier**
  - Redefine the meaning of transit and use that to promote and attract development
- **Ensure transit is included as a wrap-around service for residents; promote and looks for ways to partner on community initiatives**
  - Opiod crisis
  - Infant mortality
  - Community Health Assessment
- **Meet needs of employers and residents outside core service area**
- **Explore on-demand service in suburban areas**
- **Improve transit infrastructure, amenities and facilities**
  - Additional shelters
  - Improved pedestrian infrastructure
  - Transit Signal Priority

In the second round of outreach, stakeholders were very supportive of the recommendations of the plan and expressed excitement for the future of METRO.

4.3 Agency Inreach

Aside from regular transit riders, those with the greatest stake in METRO's success are its team members. METRO team members have unique insights on the performance of the system and how it might be improved. This includes both front line team members (bus operators, customer service representatives, dispatchers, supervisors, and maintenance) who deliver the service and/or interact with customers daily, support team members, agency leadership and the Board of Trustees. These team members provided many insights on issues related to METRO's on-street and organizational operations, and suggestions for improvement. From their daily interactions with riders, they have first-hand knowledge of how customers view METRO and its services, and how METRO could better serve its customers. Since a large number of METRO team members are also Summit County residents, team members are also uniquely positioned to provide insights on how METRO is perceived in the community.

Team members were engaged throughout the project, providing input into both "Where are we now?" and "Where are we going?" as an agency. Draft recommendations were also presented to team members for feedback before finalizing the plan. The section below describe the outreach to each of these groups in more detail.

4.3.1 Board Members

METRO's Board of Trustees is an appointed group of individuals that act as the governing body of the agency. They set METRO's governing principles and ensure the Chief Executive Officer is executing those principles in her/his management of the agency. Board members were engaged multiple times to provide input throughout the entire strategic planning process.

The project kick-off meeting with METRO Board members and METRO Leadership Team members was conducted on January 17, 2020. The project planning process and project goals were reviewed, discussed and clarified. During this opening session, the Board answered a series a two questions to help guide the plan. The questions and their summarized responses are below. They also provided input on stakeholders to involve in the plan.

- **Q: What would you like to learn through this process?**
- **A: To engage our partners and learn together how we can best provide cost-effective service.**
- **Q; What do you want the Strategic Plan to accomplish?**
- **A: To identify a service plan that will provide transit to improve our community.**

Throughout the remainder of the planning process, the Board was kept up to date on the progress. Presentations by the Director of Planning and Strategic Development were given at the following meetings (Table 4-6).

Table 4-6: Board Meetings

Meeting	Topic Presented	Date
Special Board Meeting	Outreach Summary	April 17, 2020
All Board Committees	Service Recommendations	June 17, 2020
Individual Board Member Sit-Downs	Recommendation Input	July 29-31, 2020
Planning, Marketing and Rail Committee	Draft Plan Recommendations	August 19, 2020
Planning, Marketing and Rail Committee	Outreach Summary	October 20, 2020
Planning, Marketing and Rail Committee	Plan Approval	November 18, 2020
Full Board Meeting	Plan Approval	November 24, 2020

4.3.2 Leadership Team Members

The Leadership Team provides day-to-day management of METRO and guides the agency's short-, mid-, and long-term developments. It consists of Chief Executive Officer Dawn Distler and her direct reports. In addition to participating in Board, stakeholder, and public events, the Leadership Team was provided updates on the progress of the plan at their biweekly meetings. Two meetings specific to the planning process were held at the dates and times shown in Table 4-7.

Table 4-7: Leadership Team Meetings

Topic Presented	Date
Kickoff Meeting and Plan Input	February 10, 2020
Draft Recommendations	July 31, 2020

At the July 31st meeting, the Leadership Team was able to review and provide feedback on the draft recommendations of the plan. As a group through exercises, they outlined each department's participation in and responsibilities with the plan over the next ten years. Outcomes from this meeting are included in the Action Matrix, which is presented in Chapter 5.

4.3.3 Front-Line and Support Team Members

Front line team members include bus operators, customer service representatives, dispatchers, supervisors, and others who are in direct, daily contact with customers. The Support Team consisted of team members in administrative functions, such as finance, accounting, planning, employee engagement and marketing.

Inreach for front-line and support team members was done in two stages as well. In February 2020, a series of meetings and open houses was held to gather feedback on "Where are we now?" and "Where are we going?" as an agency. This feedback was incorporated into the plan and its recommendations. A second round of outreach was held to present the draft recommendations of the plan in September 2020.

First round of Inreach

Table 4-8 lists the dates, times and locations of the first round inreach events and meetings for front-line and support team members. In addition to in-person meetings, team members were able to provide their feedback through paper and online surveys. A total of 256 comments and surveys were received through both in-person conversations and survey feedback.

Table 4-8: Inreach Events

Event	Date and Time	Location
METRO Administrative Members Open House	February 10th, 2020 9:30AM – 11:00AM	METRO Administration Building
Operator Inreach	February 10th, 2020 12:00PM – 2:00PM	RKP Transit Center Break Room
Operator Inreach	February 10th, 2020 5:00PM – 7:00PM	Kenmore Bull Pen
Operator Inreach	February 10th, 2020 7:30PM – 9:30PM	RKP Transit Center
Operator Inreach	February 11th, 2020 5:30AM – 8:30AM	Kenmore Bull Pen
METRO Customer Care Members Open House	February 11th, 2020 10:00AM – 11:00AM	METRO Administration Building
Operator Inreach	February 11th, 2020 10:00AM – 2:00PM	Kenmore Bull Pen
METRO Customer Care Members Open House	February 11th, 2020 1:00PM – 2:00PM	METRO Administration Building
METRO Operations Supervisors Meeting	February 16th, 2020 10:00AM – 12:00PM	METRO Administration Building

Table 4-9 on the next page shows the questions asked to all METRO team members and summary of answers. In general, being able to help people and good compensation / benefits are the most quoted reasons that METRO team members like about their work. However, the work can be stressful and less flexible at times, especially for front-line team members. The perceived lack of communication within the organization, especially between management and front-line team members, was one of the biggest challenges for METRO team members at all levels.

In the next ten years, most METRO team members hope to see METRO grow into a much larger organization that is capable to operate faster, more direct, and potentially 24/7 service all year long to more areas, while still maintain an worker-friendly organization culture and "family" style work environment.

Table 4-9: Questions and Answers from All METRO Team Members

Questions	Summary of Answers	Team Members
What do you like most about your job?	Helping people	Operators, Maintenance team members, Customer Care team members, Administrative team members
	Good compensations and benefits	
	Colleagues and workplace culture	
	Being able to do different things instead of repeating the same every day	
	Flexibility in work	Administrative team members
What is the most challenging part of your job?	Being on time	Operators
	External factors such as vehicle malfunctions, traffic, and weather	
	Request and receive personal days off	Operators, Customer Care team members
	Dealing with passengers issues and comments	
	Lack of communication within the organization	
If you could change one thing about METRO (about your job, the organization, or METRO's services), what would it be?	Better work schedule, more paid time off	Operators, Maintenance team members, Customer Care team members
	Better communication within the organization	
	More cooperative work culture	
	More accountability and leadership	Maintenance team members, Administrative team members
	Better use of technology	Customer Care team members, Administrative team members
	Better project planning, focus on finishing existing projects before taking on new ones	Administrative team members
	Better work schedule, telecommute, 4-day work week	
If METRO customer could change ONE THING about METRO's services, what would it be?	Re-focus on customer service skills for front-line team members	Operators, Customer Care team members
	24-hour service	Maintenance team members
	Lower / free fare	Operators, Maintenance team members, Customer Care team members, Administrative team members
	Faster, more direct service, better weekend and evening service, higher frequency	
What are the three most frequent comments from METRO customers?	Need higher frequency, long wait for connections, long hold, indirect service, more weekend / evening service	Operators, Customer Care team members
	Discourtesy from front-line team members and other passengers	
	Not running on-time	
	Lower / free fare	Operators
	Cleanness of the vehicle	
	Technology malfunction	Customer Care team members

Table 4-9, continued

Questions	Summary of Answers	Team Members
What are the three most frequent comments that you hear about METRO from people that you know outside of work, who do not use METRO?	Intense work schedule	Operators
	Service is too slow	Operators, Customer Care team members, Administrative team members
	Not enough advertising, indistinctive branding from GCRTA	Operators, Customer Care team members, Administrative team members
	Unsafe driving	
	Don't live near a bus stop, routes don't go where some want to go, too much walking	Operators, Maintenance team members, Administrative team members
	Perceptions of bad attitude from operators / passengers	Customer Care team members, Administrative team members
	Appreciate the service	
	Safety concerns	
	Good job and benefits	Maintenance team members, Administrative team members
	Empty bus	Operators, Maintenance team members, Customer Care team members, Administrative team members
Paint a picture of what you would like METRO to look like in 10 years?	24/7/365 service	Operators, Administrative team members, Supervisors
	More direct routes, crosstown routes, eliminate line-ups	
	Expand coverage, higher frequency	
	Dedicated transit infrastructure, renovate existing facilities and build new ones	Maintenance team members, Customer Care team members, Administrative team members
	More technology advanced, autonomous vehicles	
	More reasonable work schedule, more efficient, more worker friendly	Operators, Customer Care team members, Administrative team members
	"Family" style organization culture and work environment	
	More community support	Administrative team members
	Free fares	Supervisors

The planning team asked operators which routes they heard from METRO customers that need more weekend services, most operators mentioned the town center routes (Figure 4-45). When asked about which routes experienced the most overcrowding, the majority of operators (74%) said Route 1 and 2, especially in the morning. Some also mentioned Route 3 and 4 during early morning and midday during school times. METRO team members were also asked where customers would like to travel that METRO does not currently serve. Their answers are shown below in Figure 4-46. In addition, some operators mentioned that Barberton could use service after 11 pm, as well as Saturday service to Cleveland.

The planning team also asked customer care team members which METRO routes received the most feedback from METRO customers. The results are shown in Figure 4-47.

Figure 4-45: Percentage of Feedback Received by METRO Operators on Weekend Service Needed by Route Types

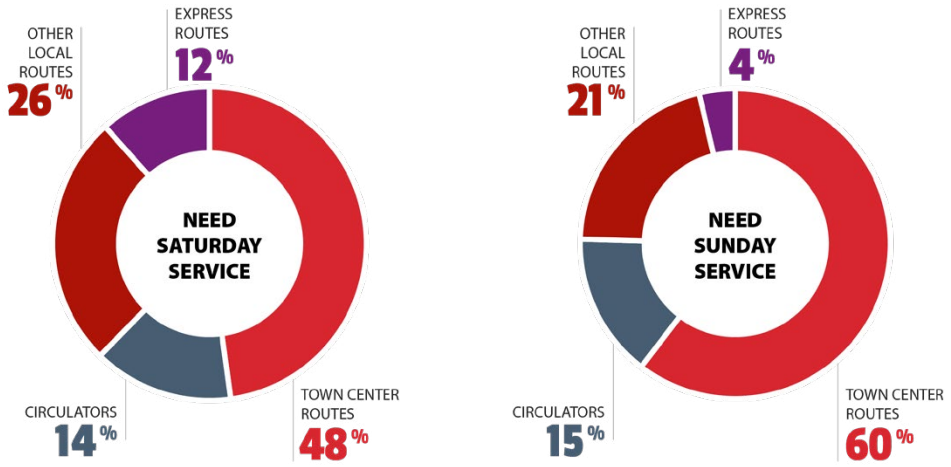


Figure 4-46: Places Where Customers Would Like to Travel That Metro Doesn't Currently Serve

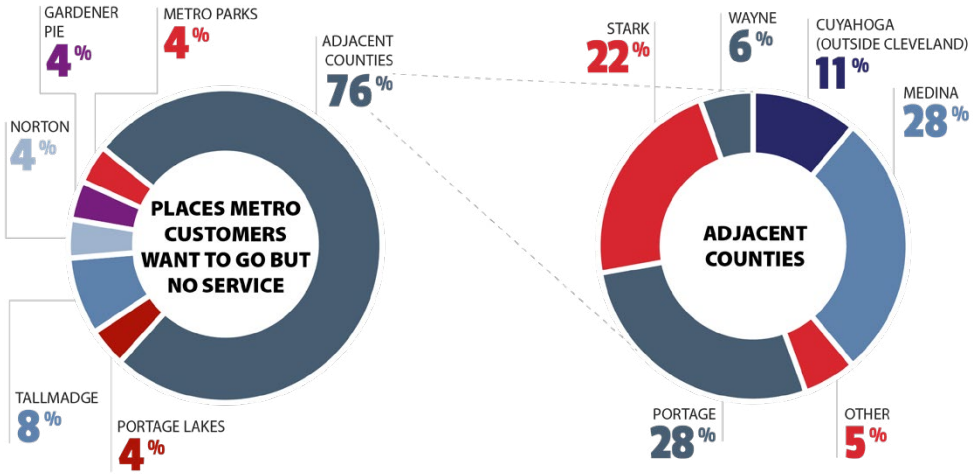
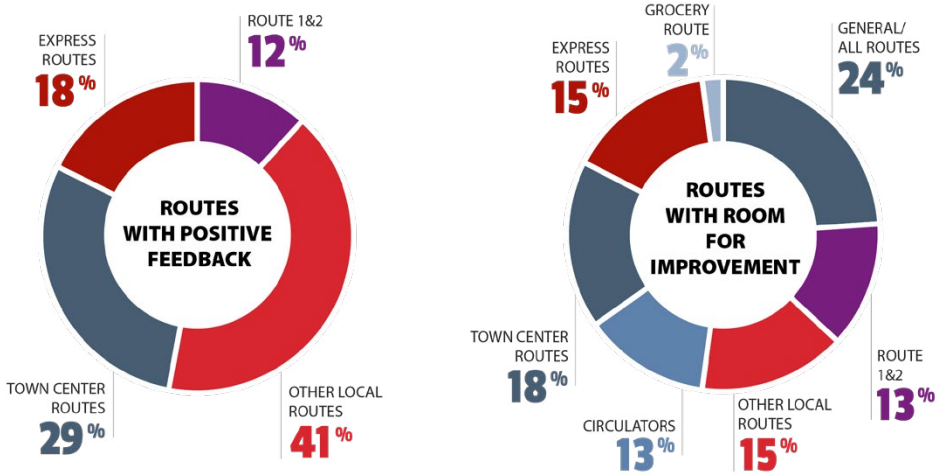


Figure 4-47: Percentage of Feedback Received by METRO Customer Care Team Members by Route Types



Second Round of Inreach

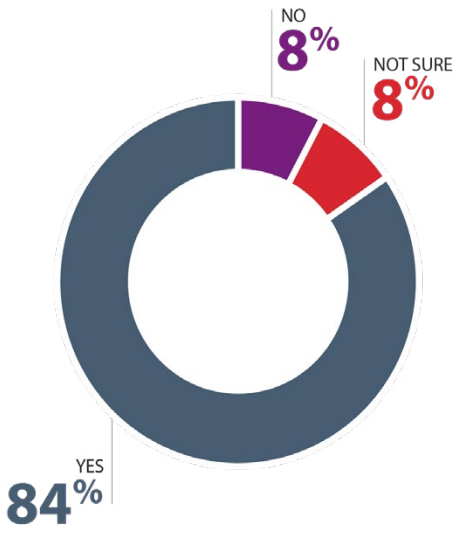
A second round of inreach activities was conducted after the preliminary recommendations were developed. Six inreach meetings were held, including four open house sessions and two meetings with operations supervisors, as shown in Table 4-10. A short feedback form was shared with METRO's internal Facebook group. Paper flyers and posters were distributed through METRO's offices. A short feedback form was distributed during in-person meetings as well as in break rooms at both the Kenmore facility and the RKP Transit Center.

The planning team collected over 80 verbal or written comments on the plan, and the recorded presentation was viewed over 130 times, as of October 26, 2020.

Table 4-10: Second Round of Inreach Events

Meeting	Topic Presented	Date
Open House	September 14th, 2020 5:00AM – 7:00AM	Kenmore Bull Pen
Open House	September 15th, 2020 11:00AM – 1:00PM	RKP Transit Center Break Room
Open House	September 16th, 2020 5:00PM – 7:00PM	RKP Transit Center Break Room
Open House	September 17th, 2020 9:00AM – 11:00AM	METRO Administration Building
METRO Operations Supervisors Meeting	September 20th, 2020 9:00 AM	METRO Administration Building
METRO Operations Supervisors Meeting	September 27th, 2020 9:00 AM	METRO Administration Building

Figure 4-48: METRO Team Members' Answers to Question "Do you agree with the direction of the strategic plan?"

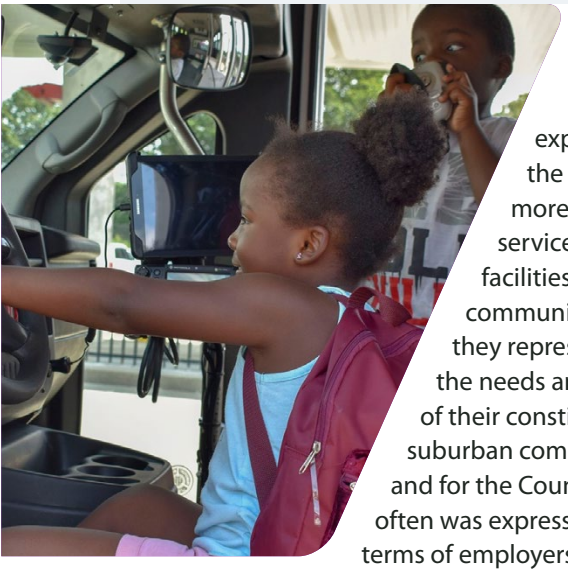


Overall, 84% of responses expressed support for the plan and approval of the direction that the plan identifies, when asked if they agree with the direction of the plan. Other comments expressed desire for more transparency and clear implementation schedules for projects, the desire for more service for passengers, and changes to specific routes and schedules.

4.4 Engagement Summary

Engagement for the strategic plan solicited comments from a range of perspectives, but the various comments and survey responses generated some common themes. METRO's customers would like to see transit service expand to more areas, run faster and more frequently, and take people more directly to their destinations. They would like the service to operate longer hours on both weekdays and weekends, while simplifying or lowering fares. The need for longer service hours and more weekend service on the 100 series routes that connect to northern Summit County generated many comments from existing customers, despite the low ridership on those routes. Beneath many of the specific comments is the need for cost-effective ways to provide connections to suburban areas, particularly connections for urban residents to jobs in suburban areas. From the perspective of existing transit users, the need is primarily to provide residents of Akron and nearby suburbs with connections to jobs in more distant suburbs that are more challenging to serve with fixed-route bus service.

City and County officials expressed support to METRO and for the strategic plan, and offered their inputs and suggestions on how METRO might improve its services, and help meet the region's transportation and economic development needs. Many



expressed the desire for more METRO service and facilities in the communities that they represent, citing the needs and requests of their constituents. In suburban communities and for the County, this often was expressed in terms of employers' needs for connections to additional employment markets to fill jobs. This, of course, aligns with the requests that customers are making for connections to suburban workplaces. Given the difficulty for transit to efficiently serve employers in lower-density or isolated areas, this is a major challenge for METRO, but also a major opportunity to help fill the transportation needs of individual residents and employers, and to fill the more general need for economic development in Summit County. Some Summit County cities also are in the process of planning for or undertaking capital investments, and would like to incorporate METRO service in those processes. In addition to fixed-route service, many expressed a desire to see new types of transit service that could better serve the existing development.

The inreach process revealed the deep satisfaction that many METRO team members get from their jobs, particularly from their service to customers and interactions with their fellow team members. The process also provided feedback on areas that METRO can work to improve. At the practical and operational level, team members identified the need to replace outdated equipment and facilities and to implement new technology solutions. At the organizational level, team members expressed the need for more, better, and more consistent communications between administrative and front line team members, more consistent messaging from agency leadership, and better prioritization of concurrent projects. METRO team members, Summit County stakeholders, and METRO customers, are unanimous in their desire to see METRO grow larger, improve its existing services and expand its service offerings to fulfill a wider variety of transportation needs.

Figure 4-49:

Summary of Feedback from Outreach and Inreach

Public Outreach

1. More service span, particularly on suburban routes
2. Prioritize frequency over coverage on fixed routes
3. Faster, more frequent service on key routes
4. Regional (outside Summit County) connections
5. Simpler, lower fares

Stakeholder Outreach

1. Opportunity for more robust partnerships
2. Opportunity for more collaboration with local planning processes
3. Transit should be more integrated into economic development
4. Service should meet needs of employers outside core service area
5. Service should meet needs of residents outside core service area
6. Need for on-demand service in areas outside urban core
7. More transit infrastructure, amenities and facility upgrades

Employee Inreach

1. Modernization of METRO organization, technology, and service
2. Clear, frequent, more consistent communication within the organization
3. Clear priorities, processes, and workflows within the organization
4. More evening, night, weekend, holiday service
5. More accurate running times; improved operator schedules
6. Increased frequencies, faster, and more direct service on key routes
7. New maintenance and office facilities needed

5. Recommendations

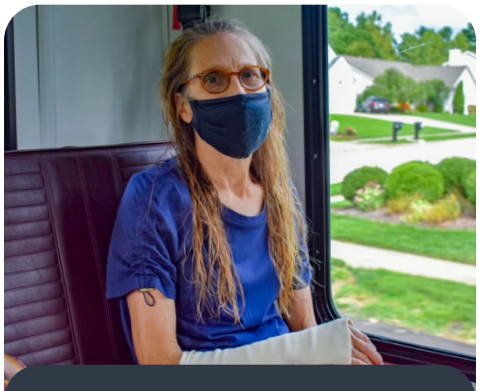
Public transit faces more challenges, and has more opportunities, than ever before - from changes to technology, and to the way people live and work.

Agencies are faced with declining ridership, growing car ownership, and continued outward movement of people and jobs from the city center to ever more distant suburbs. Technology has brought challenges to transit. For some, telecommuting and expanding home delivery options have made travel for commuting, education, or shopping less necessary. Technology has improved the quality of cars, making reliable used cars more affordable. Transportation Network Companies (TNCs), bicycle and scooter sharing services offer new options, and point to future options as automated and connected vehicles continue to develop.

Meanwhile, METRO, like many US transit agencies, is operating much the same transit system as it was 50 years ago, offering the same services—often, the same bus routes—in much the same way as when METRO was formed in 1969. However, where —(and how) Summit County residents live, work, shop, and travel has changed drastically over those decades, and will change even more rapidly in the next few decades.

METRO must take advantage of the opportunities offered by new technology and new approaches to providing mobility to meet the needs of today, anticipate the needs of tomorrow, and bring focus to urban infill development.

TNCs like Uber and Lyft have been blamed for reducing transit ridership. Some METRO riders may use them occasionally for trips that would be hard or impossible to make on METRO, such as bringing home groceries or taking a work trip when METRO isn't operating. TNCs do offer a transit-competitive mode for higher-income riders. But, their high trip cost is a barrier for many low-income transit riders. While TNCs trips may replace some trips otherwise taken by transit, they also fill gaps in METRO's transportation system. In some ways, TNCs are what METRO's riders, and community stakeholders, would like METRO to be. They offer service on-demand and go anywhere, at any time, giving everyone the same freedom and opportunities as those who can drive their own cars—for a price. That price includes fares that are far higher than a METRO bus fare, and employees with little job security and no benefits. But TNCs, microtransit, micromobility (bike and scooter share) and delivery companies like DoorDash have many qualities worth emulating. TNCs leverage technology aggressively to make their services as attractive, convenient,



The pandemic gave METRO leadership an opportunity to reflect on the agency's priorities, the needs of those who depend on METRO, and the support and desire of community leaders and public officials for better transit service in Summit County.

and as efficient as possible. They continually update their technology and business models and upgrade their service offerings to adapt to changing conditions and capture new market opportunities. Some of their technologies and operating approaches can be directly applied to fill service gaps and needs identified by this plan.

Technology has provided other opportunities for public transit. Mobile applications and text messaging have improved customer communication. Mobile fare payment applications, like EZFare, make fare collection easier for METRO and its customers by reducing costs and offering the potential for creative new fare policy innovations. On-board data collection and communications systems make transit safer and more efficient, improving transit performance monitoring. Making use of the latest technology to improve service and communication with the public will be an important element of the successful implementation of the Strategic Plan.

The COVID-19 pandemic, which began early in the plan's preparation, brought many immediate changes to the agency, its riders and employees. As was seen across the county, ridership collapsed, and service was reduced by 45%. Protecting passengers and METRO team members and ensuring transportation for essential workers became METRO's top priorities. Cleaning and sanitation standards were raised. METRO suspended fare collection to reduce contact between operators and passengers, sacrificing hundreds of thousands of dollars in fare revenue. Concerns about the health of team members continued as concerns about the agency's future sales tax revenues were uncertain, time and costs dedicated to cleaning significantly increased, and ridership initially plummeted to less than half of pre-pandemic levels.

As the pandemic continued, it became clear that in many ways, transit was more important than ever. Workers in essential services (medical services, grocery stores and pharmacies, warehouses and delivery services) needed reliable, affordable, and – most importantly — safe transportation, to allow them to get to work, do their jobs directly supporting the community, and bring home paychecks to support themselves and their families.

The pandemic gave METRO leadership an opportunity to reflect on the agency's priorities, the needs of those who depend on METRO, and the support and desire of community leaders and public officials for better transit service in Summit County. The pandemic brought into focus the concept that drives the Strategic Plan recommendations: that METRO will refocus and rebrand as Summit County's Regional Mobility Provider.

This rebranding has two key elements:

- **Focusing METRO's fixed-route services on METRO's highest ridership corridors, and on serving markets where (and for whom) transit is essential.**
- **Taking advantage of new technologies and service approaches to provide opportunities for innovative services.**

This change in focus does not mean that METRO will stop operating bus routes and demand response services, but that METRO will focus less on what it has traditionally done (operate and maintain buses) and more on why they do it (to get people where they need to go—safely, conveniently, and cost-effectively). As a regional mobility provider, METRO will work with community leaders, employers, public agencies, and members of the public to identify mobility needs. METRO will address those needs with existing METRO services and programs, connect those needs to other existing services and resources in the community, or work with other entities in the community to create new programs and identify new resources to meet those needs.

This transition, which will make METRO the preferred transportation provider for those who live and work in Summit County, will require changes to every aspect of METRO's operations and organization. METRO must apply new service approaches, acquire new technologies, and develop new partnerships and resources, to make this transition successful and meet Summit County's changing transportation needs over the next ten years and beyond.

5.1 Goals

The six goals of the strategic plan (shown in Figure 5-1) were initially developed based on METRO's vision, mission statement, and core values, as approved by the Board of Trustees in 2017. At a kickoff meeting in January 2020 with METRO's leadership team and Board of Trustees the six goals were further refined and approved. Throughout the rest of the planning process these goals were further vetted by evaluating the State of the System, conducting a market analyses, and collecting input from members of the public, METRO customers, community stakeholders and leaders, and METRO team members participating in the agency inreach process.

These goals, together with the gaps, opportunities, needs, and input identified in the three previous sections of this report, contributed to formulation of the project recommendations and action plan .

Figure 5-1: Goals of the Strategic Plan

5.2 Recommended Strategies

The plan recommendations are grouped into nine recommended strategies under the overarching theme of rebranding METRO as Summit County's regional mobility provider (Figure 5-2).

Rebranding METRO as the county's regional mobility provider would broaden METRO's focus from operating transit services to addressing transportation needs. Under this model, METRO would match transportation needs to the most appropriate services, programs, and funding sources to meet those needs. METRO's existing fixed-route and demand response services would be among a broader palette of services operated, managed, and funded by METRO and other a broad range of community partners including public, private, and non-profit entities. The steps in implementing this transition include:

- Develop and execute a marketing and outreach strategy and timeline
- Deepen community partnerships to understand needs and support local and regional plans
- Develop targeted education and outreach approach for new operational strategies

The three primary operational strategies correspond to METRO's three service modes; Fixed-Routed Design, New Mobility Strategies, and Demand Response Management.

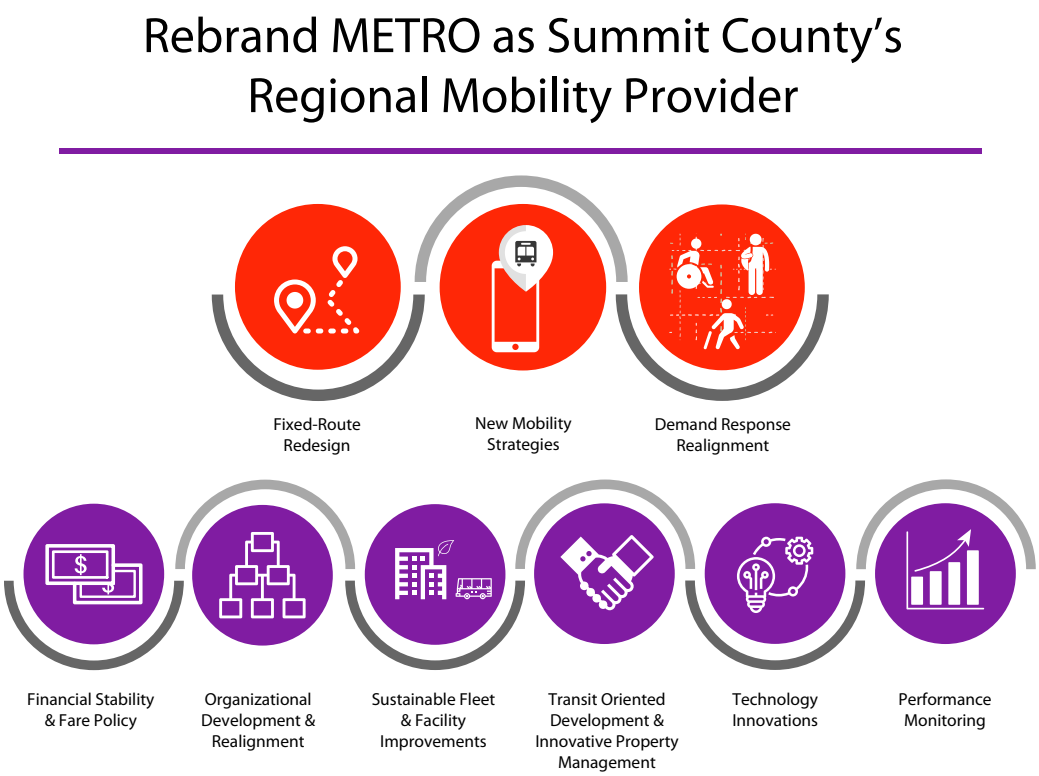
- **Redesign METRO's fixed-route transit network**
- **Implement New Mobility strategies to complement and fill gaps in METRO's system**
- **Realign and Reimagine METRO's demand response services to cost-effectively meet the needs of disabled and older customers**

The six supporting strategies, listed below, will provide the means and support to successfully transition to METRO's role as a regional mobility provider, and address other issues identified in the plan to improve METRO's organization and operations:

- **Financial stability and fare policy**
- **Organizational development and realignment**
- **Sustainable fleet and facility improvements**
- **Transit oriented development and innovative property management**
- **Technology innovations**
- **Performance monitoring**

These primary and supporting strategies would work together as an integrated package to advance METRO's goals in broadening its services to the community.

Figure 5-2: Recommended Strategies



5.2.1 Operational Strategies

The three primary operational strategies relate to how METRO's services would be adapted over the next ten years to fulfill the more encompassing role as the County's regional mobility provider, and to fill gaps and needs identified in the plan.

Fixed-Route Network Redesign

The starting point for implementation of the three operational strategies is a network redesign project, which would build on the evaluation of fixed-route and demand response service that began in this strategic plan, and develop recommendations to advance the goals and address the gaps and needs identified in this plan.

Outcomes of the network redesign will include:

- Changes to the fixed-route network, including possible changes to route alignments, service frequencies, and span of service.
- Reallocation of service frequency among routes by reducing service frequency or looking for service alternatives on lower performing routes, adding frequency to higher performing routes, or starting new routes to address unmet service needs.
- Identify areas of integration with New Mobility services, determining places, times, and markets, where New Mobility services might be more cost-effective for serving existing fixed-route or demand response services.

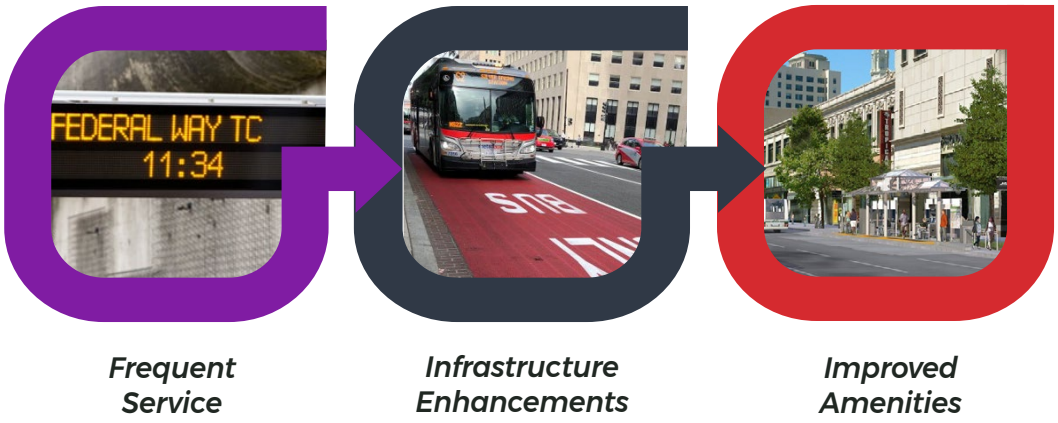
Route and network performance analysis identifies seven best practices for successful mid-sized bus route networks like METRO's. Bus routes and networks that follow these best practices are almost always highly productive and cost efficient, and the success of individual routes within networks depends greatly on the degree to which the routes follow these practices. The seven best practices are shown in Figure 5-3 on the next page, and will guide the development of METRO's redesigned fixed-route network.

Figure 5-3: Seven Elements of Successful Bus Routes

These recommendations would be refined through an extensive outreach process that would involve existing METRO customers, community leaders and stakeholders, employers, members of the public, and METRO team members. Title VI and Equity analyses will also be completed to ensure the service works well for those who need it most. This would be followed by phased implementation of service and program changes, possibly over a period of several years.

A transit-priority corridor feasibliity study would be conducted concurrently with the network redesign project to analyze the potential for service and corridor improvements including Bus Rapid Transit (BRT). BRT is a term referring to a wide variety of transit corridor capital and operational improvements that establish a service emulating rail transit. The Federal Transit Administration defines BRT as "a high-quality bus-based transit system that delivers fast and efficient service that may include dedicated lanes, busways, traffic signal priority, off-board fare collection, elevated platforms and enhanced stations."[5] Other typical BRT elements include frequent service throughout the day, a widened span of service, special branding including "subway-style" maps showing stations rather than bus stops and visible, amenity-rich station environments. These characteristics are attractive to transit riders, add system capacity where demanded, and help urban bus services to compete with other travel modes such as automobiles and TNCs. Chapter 2 notes that trips on METRO's fixed-route system are concentrated on just a handful of routes, with nearly a quarter of all trips using just two routes: Route 1 - West Market and Route 2 - Arlington. These and other high-ridership corridors share common attributes, including relatively high population and employment density and multiple destinations at the outer end and at various locations along the route.

Figure 5-4: Transit Priority (BRT) Feasibility Project Outcomes



[5] Federal Transit Administration website at https://www.transit.dot.gov/research-innovation/bus-rapid-transit. FTA provides links to several BRT reports and resources at https://www.transit.dot.gov/research-innovation/bus-rapid-transit-resources.

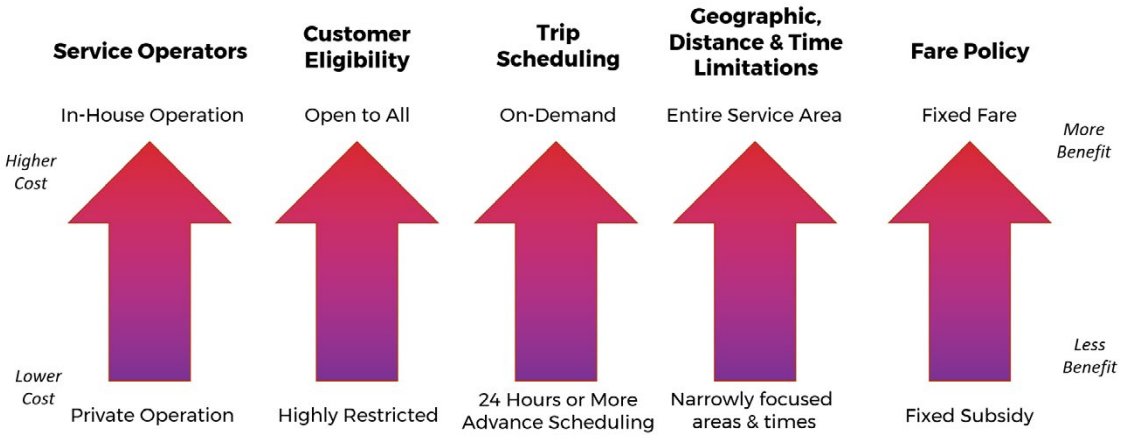
New Mobility Strategies

The potential for developing New Mobility strategies to fill service gaps and improve service performance is one of METRO's most promising opportunities. New Mobility is any non-traditional form of public transit designed to fill a need that is not easily or cost-effectively addressed either by traditional fixed-route or demand response transit services. METRO's Call-a-Bus and METRO Connect programs (curb-to-curb service for non-disabled customers traveling within certain areas) are examples of New Mobility strategies that METRO is operating now. Improved technology and operational models have greatly expanded New Mobility's potential to cost-effectively fill unmet transit demand in the past five years.

New Mobility services can be defined flexibly to address specific transportation needs while controlling costs, for example, by providing curb-to-curb connections within a defined service area, or managing vanpools to transport employees from various areas to a workplace. New Mobility services are flexible in the types of services they provide, the times, places, and populations they serve, and the fares they charge. They also are flexible in who owns, operates and maintains the vehicles, dispatches, manages, and markets the service and customer interface, and who funds for the service. METRO fills all these roles for its existing services, but each of these roles can be separated and integrated into a service that appears seamless to the public. For any service, any of these roles potentially could be filled by METRO and/or one or more other public or non-profit agencies, employers, or private contractors.

Fundamentally, a financially sustainable New Mobility service must balance meeting its transportation goals against affordability for the agency. Service that fails to regularly meet the target population's needs is an ineffective use of time and resources, while service that meets those needs but is unaffordable will not survive. Fortunately, the FTA provides flexibility for agencies to pilot New Mobility services. Agencies all over the US are developing and fine-tuning pilot services to test New Mobility approaches to meet transportation challenges. Some of these services are being operated by agency personnel, others are using private firms offering everything from mobile apps to turnkey New Mobility services. Figure 5-5 shows the parameters that METRO will consider when designing New Mobility services to meet specific transportation needs, These parameters offer METRO mechanisms ("levers") to optimize demand and access for the Mobility Service to balance its usefulness, convenience, and affordability to the customer and maintain affordability for the agency.

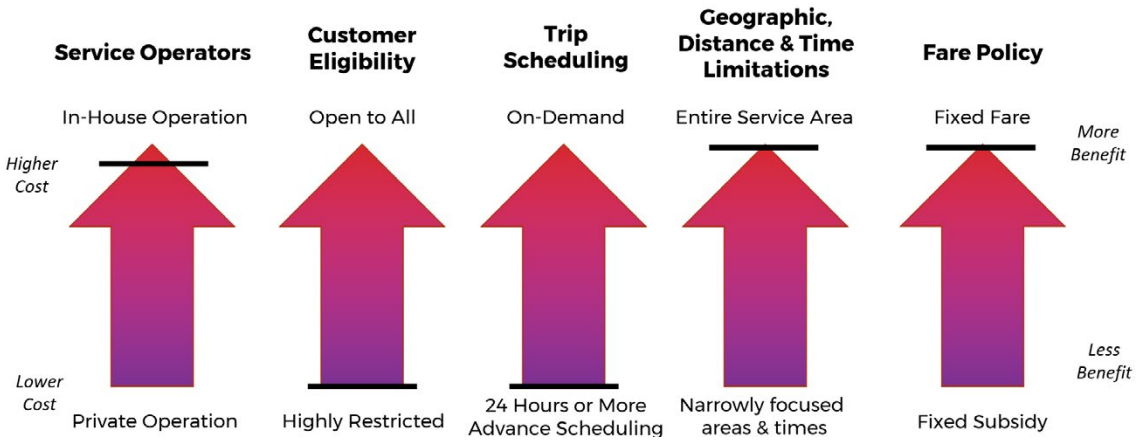
Figure 5-5: New Mobility Strategy Parameters



As an example of how a New Mobility service might be designed, Figure 5-6 shows where METRO's existing SCAT service would measure up along the six service parameters shown in Figure 5-5. SCAT is operated mostly by METRO team members, with limited private supplemental service. It offers door-to-door service throughout the county, and has a low, fixed-fare ($2.00) whether the trip is two miles or twenty. The low, fixed-fare make it extremely attractive compared to taxi or TNC services, which easily

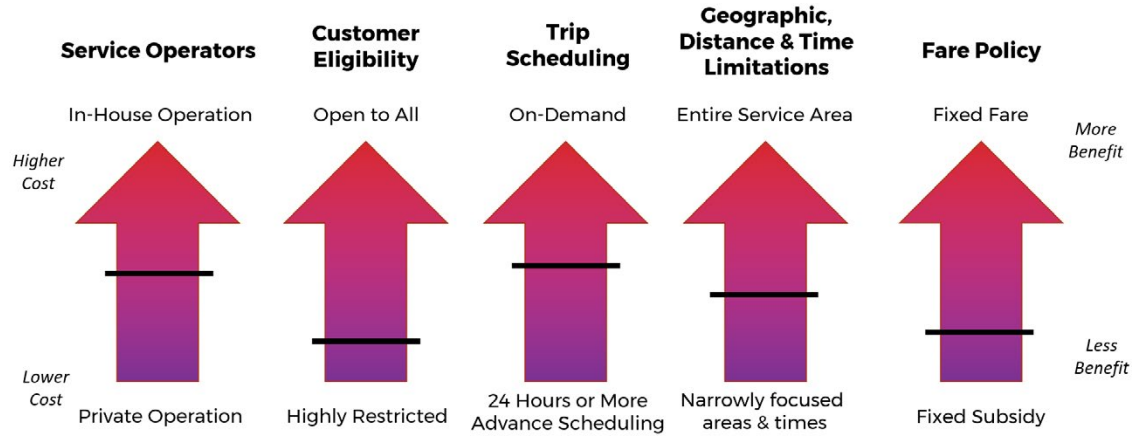
can cost over $30 for a trip from Akron to the northern edge of the county. The only restrictions that set it apart from Taxi or TNC service are that users must be age 62 or over (or have a qualifying disability) and must arrange the trip 24 hours in advance.

Figure 5-6: Parameters of METRO's Existing Demand Response Service



As noted in Chapter 2, METRO's cost for providing SCAT is approximately $40 per passenger trip for service operated by METRO, and about $30 for privately operated trips. Restricted to the elderly and persons with disabilities, the service provides more than 500 trips each weekday. If SCAT were available to all without any eligibility requirements, METRO could not meet the demand or sustain its costs, and fixed-route ridership would plummet. Developing a successful and sustainable New Mobility program requires finding the "sweet spot" where the service parameters make the service attractive to customers in the target populations or areas, while controlling demand and costs by adjusting the various parameters (Figure 5-7). For example, service might need to be restricted to certain geographic areas or limiting trip distance. Service also could be restricted to certain times of day (evenings, overnight, weekends). For some programs, customer eligibility may be restricted, such as on employer-based services that are limited to use by employees of certain companies or employers in certain geographic areas. Scheduling need not be on demand, and could require advance notice of anywhere from a few hours to more than 24 hours, or trip subscriptions for employment or education-oriented programs.

Figure 5-7: Finding the "Sweet Spot" for New Mobility



Finally, unlike ADA fares, New Mobility fares are unregulated, and have greater flexibility. As an example, if using a subsidized TNC, services can be priced to offer customers a fixed fare (the customer is responsible for the first few dollars of the TNC fare, which the agency covering the rest of the cost), or a fixed subsidy

(the agency's subsidy is limited to a set amount per trip, such as $5 or $10, with the customer covering the first few dollars of the fare, and then any fare above the agency contribution). New Mobility services are more convenient than fixed-route bus service, and usually much more expensive to provide. This justifies setting the fares higher than on fixed-route bus or demand response services that serve the elderly and persons with disabilities, subject to all appropriate fare equity analyses.

As the region's mobility provider, METRO would serve as the primary contact and clearing house, matching needs to existing providers and funding sources, and creating new programs and partnerships to meet new and changing transportation needs.

New Mobility services often are initially implemented as pilot programs to test approaches to meeting transportation needs. These pilot programs have specific objectives to meet defined needs, a fixed budget, and a limited duration (of at least 12-18 months), after which the program is evaluated and continued, refined, or terminated.

Reimagine Demand Response Services

METRO's SCAT and ADA demand response services are vital to thousands of the County's disabled and older citizens. Many demand response customers rely on METRO to go to work or school, shop, get medical treatment, or make other life-critical trips. METRO team members form part of these customers' support network, looking out for them and keeping them connected to the community. As discussed in Chapter 2, METRO's demand response services also are sometimes overburdened by demand. As door-to-door services, they are inherently inefficient, carrying only around two passenger trips per service hour and a cost of about $40 per passenger trip.

Maintaining access to high quality demand response service for METRO's most dependent disabled passengers, while controlling rising costs, will require METRO to reimagine how it provides demand response services, including program eligibility, fare policies, and operations. Ultimately, without program changes, rising costs and demand will force METRO to gradually limit use of its traditional demand response services to serving only ADA-certified customers and trips that fall within ADA requirements.

A transition plan should be developed to review how existing SCAT customers would be transitioned into the new service model and working with existing SCAT customers to ensure that they continue to receive the transportation services they need. This would include determining their eligibility for ADA service and reviewing fare policies to offer discounts on fixed route services and to address the current difference between SCAT and ADA fares. This is described in more detail in the following Financial Stability and Fare Policy strategy.

Providing customers with a choice of mobility options based on their mobility needs also will help METRO use demand response dollars more cost-effectively.

Fare incentives—possibly including free fixed-route fares for ADA or SCAT eligible customers and/or reduced fares for New Mobility services—potentially could encourage many current demand response customers to use fixed-route or New Mobility services if they are able to do so, particularly in warmer months. Bus stop, sidewalk and crosswalk improvements also would help remove barriers preventing ADA and SCAT customers from accessing fixed-route service.

There are many existing and potential service resources that METRO can call upon to supplement its demand response services. Some of these overlap with New Mobility resources. METRO now contracts with a private provider with accessible vehicles to supplement its demand response services during peak demand periods, as well as off-hours and weekends. In addition, many public agencies, communities and non-profit organizations have accessible vehicles—in many cases, vehicles purchased with federal transit dollars—and operate accessible services to transport clients and members of the community in specific categories (elderly, veterans) or with specific disabling conditions (for example, visual impairment or muscular dystrophy). Private mobility providers specializing in Medicaid or Veterans Administration (VA) transportation are another potential resource with accessible vehicles that METRO potentially partner with to expand its demand response service resources. Coordination and partnerships with these organizations and providers can expand METRO's ability to serve disabled citizens with accessible services and improves the cost efficiency of METRO's and other services. Many of

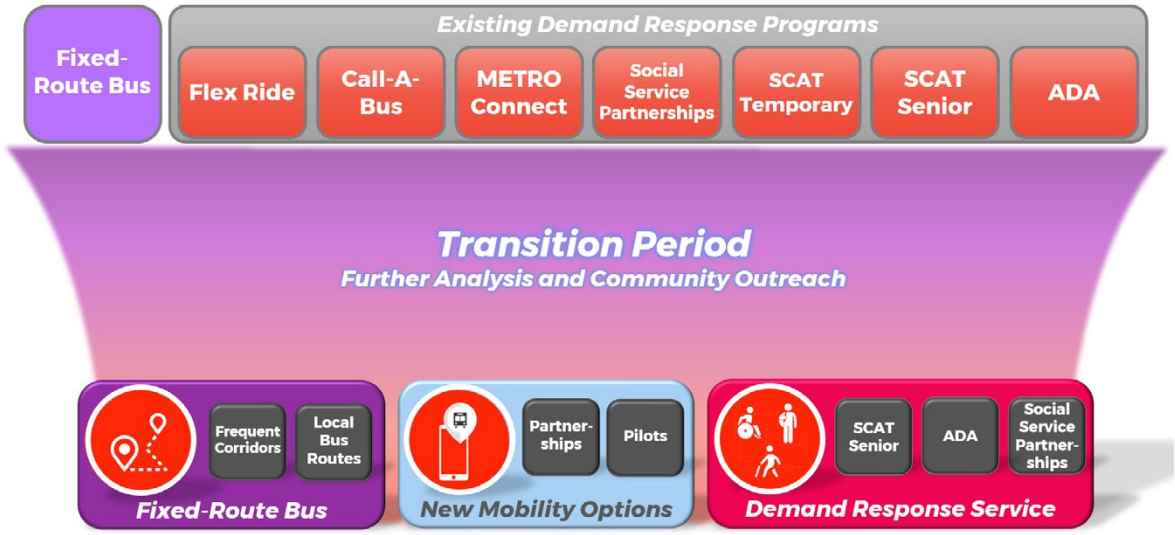
these partnerships bring with them the potential for additional funding streams to further support the community's accessible services.

Transition of METRO Operations

Implementation of the three primary strategies – Fixed-Route Redesign, New Mobility Strategies, and Demand Response Realignment, will require a transition period during which METRO's team will conduct further analysis, public and stakeholder outreach, and agency inreach, to complete the evolution of METRO's service lines to their ultimate form.

Figure 5-8 below shows METRO's existing and proposed services and the transition period.

Figure 5-8: METRO Services Lines -- Existing (above) and Proposed (below)



4.2.2 Supporting Strategies

A series of six categories of supporting strategies underlie METRO's realignment of services. These include strategies to align various aspects of the agency's operations and organization to a more expansive vision of mobility, and to address gaps and needs identified in the plan that are not directly related to the agency's operations. These strategies are further defined in the following sections.

Financial Stability and Fare Policy

METRO's financial stability depends on METRO achieving three critical financial objectives: controlling increasing wage and benefit costs, developing a fair and equitable passenger fare policy, and implementing financial controls to create operating and capital reserve funds to support the agency's development and protect the stability of its services.

To ensure METRO's financial stability and fare equity, METRO should take the following steps in the short- to mid-term:

- Update financial policies and set strict reserve policies
- Develop and maintain a 5-year Capital Improvement Plan (CIP)
- Maximize the use of new and existing funding sources from Federal, State, Local and private sources
- Create goals and execute measures for controlling operating cost growth
- Perform a fare equity analysis and if appropriate, update Fare Policy to provide fair, equitable and consistent passenger fares
- Determine best integrated solution for fare collection (cash, contactless, cashless, passes)

As noted in Chapter 2, METRO's costs have been rising faster than revenues. Continuing to increase operating expenses faster than revenues will eventually deplete METRO's financial reserves. METRO had $59 million in available funds (i.e. unobligated for federal funds, or uncommitted to any specific use) at the end of FY19. However, METRO does not maintain a dedicated capital reserve fund, to finance the local portion of vehicle replacement and facilities replacement and upgrade costs, or an operating reserve fund, to maintain service in the event of a loss of operating revenue. In such an event, without an operating reserve, METRO would have to reduce service levels, inconveniencing customers, reducing work hours, and ultimately reducing staffing levels.

To mitigate these risks, METRO should update its financial policies and set controls to protect METRO's financial stability. METRO should dedicate a percentage of its sales tax revenues to operating and capital reserve funds and establish a five-year CIP for fleet maintenance and growth, facility maintenance and upgrades, and development of new facilities, such as BRT facilities. Capital funds would be earmarked for facility investments and to leverage federal or private grant funding for capital investments, while operating reserves would allow METRO to weather an extended decline in revenues without reducing service levels or laying off employees. The CIP would tie future capital investments to both federal formula capital funding sources and other sources, including competitive Federal grants, State grants and other local and private sources, potentially including non-profit grants.

METRO's financial stability depends above all on its ability to control increasing wage and benefit costs, which have risen at unsustainable rates in recent years, and now place METRO's labor costs the highest in Ohio and among its peer agencies. METRO has a wide variety of options available for controlling or reducing costs, including capping operating cost increases, restructuring health care benefits to include health care spending accounts (HSAs), right sizing services in the context of the network redesign project, and making other changes to expenditures to cap or reduce operating costs. Controlling costs is inherently challenging for agencies, and can be disruptive for team members and customers alike. However, they are necessary to assure METRO's future financial and operational stability.

When considering METRO's fare structure, the $1.25 single-ride cash fare is the lowest of METRO's peer group, and gives METRO the group's lowest farebox recovery rate. Increasing fares would likely reduce ridership slightly, but could be expected to provide the agency with more revenue to support existing services and strategic initiatives. However, fare policy has become a complicated, and potentially controversial subject at many US transit agencies. During the two years before the COVID-19 pandemic, several US transit agencies temporarily or permanently eliminated passenger fares, including Kansas City, Missouri, Olympia, Washington, and Worcester, Massachusetts. These agencies secured alternative funding from local sources to replace the revenues supplied by passenger fares. Agencies in many other cities have considered eliminating fares, and many agencies (including METRO) temporarily suspended fares during the early months of the COVID-19 pandemic, mainly to avoid transmitting the virus by eliminating face-to-face contact between customers and operators.

Transit industry conventional wisdom discourages free fares, even if fare revenue can be replaced. Agencies often struggle to serve surging ridership attracted by the free fares, and often face security challenges from uncontrolled customer access to vehicles and facilities. Arguments in favor of free fares cite social equity and environmental benefits, and the (significant) operating and capital costs of fare collection. METRO must consider these and other issues as it considers which direction to pursue in future fare policy. If METRO does not eliminate fares, METRO should undertake a fare equity analysis to analyze its fares and fare products to optimize fare revenue while minimizing impacts on METRO's mostly low-income customer base. This analysis would include a review of METRO's multi-ride pass offerings, potential fare discounts and loyalty programs using the EZFare mobile payment platform, and the current anomaly in METRO's demand response fare system that prices ADA service fares at a higher rate ($2.50 per one-way trip) than SCAT service ($2). In addition to pricing, an analysis on the fare collection system should be done to evaluate how best to transition to a contactless system. METRO is in the process of installing validators to electronically read mobile tickets purchased on the EZFare system. These validators open the door to additional technologies and policies for fare collection, including account-based ticketing. Account-based ticketing would allow METRO to implement fare-capping (where fare collection is capped when a customer meets the fare equivalent of a daily, weekly or monthly pass), implement loyalty programs, or offer discounts based on eligibility criteria. Moving over to a contactless fare payment system could also reduce METRO's fare collection costs, as processing cash payment comprise a large portion of a transit agency's operating costs. In the analysis of if or how to transition to a contactless system, great consideration

must be given to make the system equitable and accessible to all METRO customers.

Organizational Development and Realignment

Managing regional mobility by operating and coordinating a wider array of services, designing and implementing BRT investments in one or more corridors, creating a stronger focus on partnerships, and focused and deliberate participation in the economic development of the region will require METRO to shift as an organization. In the short term, METRO must evaluate its existing organizational structure and resources in relation to its evolving administrative and operational needs as a mobility provider and developer of a larger capital plan. This realignment should outline internal processes in each department and identify opportunities to improve efficiency, communication, and coordination of agency priorities among departments, and, particularly, for communication from agency leadership to team members at all levels.

The transition to METRO's function as a mobility provider will likely also require additional team members to ensure the successful implementation of multiple service, organizational and facility development projects simultaneously. Initiatives such as constructing new facilities, pursuing transit-oriented or joint development opportunities, and implementing Bus Rapid Transit corridor enhancements require team members with applicable experience in program and project management who are focused on executing these complex projects.

Perhaps above all, METRO will need expanded technology functionality, to manage technology upgrades in many areas of the agency's operations and to monitor technology markets to identify opportunities for technology to improve the quality and efficiency of METRO's services in the future. This could include hiring of a Chief Technology Officer or Chief Innovation Officer, a permanent new divisional-level team member reporting directly to the Chief Executive Officer. Many similar-sized transit agencies have added this role to their organizations in recent years to manage technological change. This technology or innovation executive would coordinate the continued renewal of technology applications, or prudent implementation of innovative approaches more generally, across the organization. As a peer to METRO's other divisional or departmental leads, this position would be charged with insuring that METRO maintains current best practice approaches to service provision and evolves to match changes in the market and workforce, as well as technical, organizational and industry best practices.

After initial changes to the organization structure to match organizational focus, METRO should set a schedule for the CEO and the Leadership Team to conduct periodic reviews of the organizational structure to ensure consistency of the structure with organizational and community needs.

Additionally, in the interest of improving METRO's standing as a workplace and attract high quality prospective employees, METRO should evaluate and update employee policies and procedures to align with peers and ensure the agency's status as an "Outstanding Workplace."

Sustainable Fleet and Facility Improvements

As noted in Chapter 2, some of METRO's existing operating (bus storage and maintenance, administrative office) and passenger (transfer facilities, park-and-ride lots) facilities are inadequate to meet existing needs and are nearing, or past, the point of requiring renovation or replacement. The process of meeting METRO's facility needs begins with updating its recent facility and needs assessment to account for existing needs and support implementation of alternative fuel fueling facilities. METRO also must regularly update this assessment to account for future needs as they are defined by future detailed planning. The planning and priority of these facilities also must consider the potential of each new or replaced facility for attracting joint development with public or private partners, or their use to leverage and facilitate transit oriented development.

METRO's existing fleet plan outlines a replacement schedule to update its existing fleet over the next several years. However, METRO's fleet size and composition will be greatly influenced by the transition of METRO's role to regional mobility management, and more specifically by the outcomes of the network redesign and network redesign projects and the integration of New Mobility into METRO's palette of services. The outcomes of these plans and development of new services could greatly change the number and types of vehicles required for both fixed-route and demand response services.

METRO's current fleet management plans include limited use of battery electric buses alongside its existing diesel and CNG fleet. METRO should continue to monitor the market for battery electric and other alternative fuel and zero-emission vehicles and set goals and benchmarks for transitioning the fleet to one or more alternatives as they reach operating range and life cycle cost parity with Clean Diesel and CNG options. Battery electric and other low-or no-emission vehicles have higher life-cycle costs than Clean Diesel or CNG buses due to higher initial costs and initial capital costs

of charging/fueling stations and associated equipment and connections. Battery electric vehicles also have range limitations which can increase operating expenses. However, this could rapidly change over the next several years as the technology continues to be developed, driven by increasing regulation, environmental concerns, and potential changes in the relative costs of electricity and other fuel types. In addition, regulation at the Federal or state level ultimately could require transition to a low-or no-emission fleet, making it imperative that METRO be prepared to make this transition, which could take 15 years or more to complete, when it is opportune or required.

METRO's decision regarding its future administrative office location is the most prominent example, though not the only one, of how METRO must carefully consider its opportunities nd constraints in making facility decisions. METRO's existing office facilities at 416 Kenmore Boulevard, like the bus storage and maintenance facility, are in need of short term upgrades or replacement. METRO could pursue several options in regard to its facility: replace the administrative facility adjacent to the new maintenance and storage facility on Kenmore Boulevard; build a stand-alone office facility adjacent to RKP Transit Center, or use its potential occupancy of office space to leverage a larger transit oriented development, at RKP or elsewhere in and around downtown Akron.

Co-location within the maintenance and storage facility has advantages related to employee-relations and organizational cohesion. Almost the entire team is housed in one place and interacts daily. However, location in or near downtown Akron brings the advantage of placing the Chief Executive Officer and administrative team members in close proximity to the heart of the operation, as well as many stakeholders and decision makers who work in downtown Akron. Transit agencies usually disengage their office space from their maintenance facility at some point in their organizational growth, with smaller agencies mostly co-locating offices with their maintenance facilities, and larger ones locating offices in the downtown core. This often occurs at the point when an agency requires a second operating division--or when it develops a new downtown transit hub.

Comparing three Ohio transit agencies—Central Ohio Transit Authority (COTA), Greater Dayton Regional Transit Authority (GDRTA), and Stark Area RTA (SARTA), is instructive in this regard. COTA is larger than METRO and has its offices is in downtown Columbus. SARTA is smaller than METRO and has its office adjacent to the maintenance facility. GDRTA, which is around the same size as METRO, used its office space to leverage development of its downtown transit hub. The agency's investment in office space facilitated the transit hub's development and led to the redevelopment and integration of a small historic office building into the facility. The downtown location places GDRTA decision makers closer to regional leaders in business, government, education and the non-profit community, makes it easier for GDRTA team members to use transit for their commute trips and to access downtown amenities.

One possible concept for location of METRO's offices at the RKP Transit Center would be jointly developing office and storefront space adjacent to the facility for use both by METRO and other partners or services that could meet the day-to-day needs of transit customers. This strategy potentially could facilitate the collaboration of many partner agencies in developing the project, helping to leverage both FTA grants and other public and private funding for the project. Co-locating these services would improve access to them for METRO customers, encourage employees of both METRO and other agencies to use transit, and facilitate further collaboration and coordination of services among the co-located agencies.

Potential joint use or joint development/partnership opportunities should be pursued at the point of renovation or replacement of METRO's other regional transit hubs, or whenever mutual benefits to of new facilities exist. These partnerships would better integrate the facilities into adjacent development and to potentially facilitate TOD around the sites. Renovation or replacement of these facilities must be integrated with the TOD strategies discussed below.

Technology Innovations

Transitioning to its role as a regional mobility provider will require METRO to pragmatically advance its use of technology, seeking new technologies that facilitate more efficient and effective service while avoiding the technological "bleeding edge" that can increase costs and compromise service quality. Many of the initiatives discussed in this chapter have highlighted the need for new technologies and innovative approaches to facilitiate new programs or improve agency efficiency and performance. This includes the discussion of the role of Chief Technology/Chief Innovation officer in advocating and advancing technology applications and innovation more broadly, discussed above in the organizational recommendations. Initial responsibilities for this new position includes developing a technology plan to assess the application of technology in all areas of METRO's operation and developing a plan for upgrades to bring METRO's use of technology to a state of current best

practice. This would be followed by periodic performance audits at regular intervals to update the assessment and implementation plan.

As noted in Chapter 2, and elsewhere in this chapter, METRO may have opportunities to upgrade its use of technology in areas like fare collection and data integration. In particular, METRO will require new technologies, potentially in areas like mobile applications and demand-response scheduling and customer care software and hardware, to facilitate development of new mobility programs and improve service convenience and efficiency.

Transit Oriented Development and Innovative Property Management

In addition to initiatives related to its own major facilities as part of its facilities plan, METRO should pursue other opportunities to promote Transit Oriented Development (TOD) at the local and regional levels. The benefits of TOD are two-fold; it brings more people and jobs within reach of fixed route transit increasing access to opportunity, and it provides lifestyle benefits of more compact, walkable, and vibrant mixed-use development.

METRO should pursue opportunities for partnering with developers in key transit corridors, as well as identifying innovative approaches to managing all METRO property. This can be accomplished through the following initiatives:

- Establish TOD Working Groups to promote transit-oriented development in METRO service area. This includes a regional working group comprised of representatives of AMATS, Summit County, all Summit County communities, and interested developers and representatives of other agencies and groups; to promote the TOD concept and coordinate initiatives across the county and region. Subgroups representing the City of Akron and other individual or regional groups of communities would be formed to promote TOD and facilitate TOD initiatives at the local level.
- Investigate the opportunity for TOD near RKP Transit Center, leveraging FTA HOPE Grant Funding and other funding opportunities to develop mixed use development, possibly incorporating METRO office space or other public and non-profit office space as discussed in the facilities section.
- Pursue and secure a competitive FTA TOD Planning Grant to perform a TOD Market-Feasibilty Analysis along prospective BRT corridors identified in the BRT feasibility study.
- Partner with other public agencies, private developers and non-profit entities to pursue TOD projects in areas around existing transit centers and in BRT corridors
- Determine a strategy for proactive property management and development for METRO-owned property, in coordination with the TOD Market Feasbiilty Analysis and other regional TOD initiatives

Performance Monitoring

Chapter 2 identified several performance issues with METRO fixed-route services, including crowding and late running on some routes, and low productivity on parts of many routes. The volume and quality of data to evaluate and monitor the performance of transit service has exploded in the past decade. On-board data systems collect vehicle location and passenger ons and offs, and cell phone data, mobile apps and other data sources provide us with more information on transit customer travel patterns. METRO, like other transit agencies, has barely begun to unlock the full potential to manage and refine its system to improve its performance.

> METRO should update its Key Performance Indicators (KPIs) based on the goals and initiatives of this Strategic Plan, creating a new framework for managing and evaluating agency performance to maintain accountability with agency and strategic plan goals.

This process should include identifying new data sources, analysis approaches and tools to support this evaluation, creating a multi-layered evaluation framework to evaluate performance across a wide variety of agency functions. This tool would then be used to support agency management and planning functions in the short (from hourly to monthly) medium (quarterly) and longer term (annually and beyond), and evaluation of the agency's progress in meeting strategic goals through a semi-annual compliance evaluation process.

METRO should incorporate these KPIs, with the Strategic Plan goals and objectives, in the annual budget process to ensure that METRO's financial priorities are aligned with meeting service and performance standards and advancing strategic goals initiatives.

5.3 Action Plan for Regional Mobility

The action plan presents the process that METRO will follow to advance the recommended strategies and achieve its goals. Each strategy was developed to specifically meet the gaps identified throughout the planning process. The plan breaks down the process of advancing each strategy into individual, actionable steps that METRO can follow over the next several years. It then prioritizes the strategies, and identifies the relationships and interdependencies among them. These steps are shown in detail on the Action Matrix, which begins on page 121. The action plan also indicates potential "quick wins" that METRO can achieve in the short-term, to provide tangible benefits to it users, team members, and the community over the next few years.

The process of advancing each of the strategies usually follows the same simple four-step process, as shown in Figure 5-9.

Figure 5-9: Four Step Strategy Implementation Process

Make Detailed Plans

Advancing many of the strategies (network redesign, BRT development, organizational restructuring, technology, among others) will require more detailed planning, community outreach, and agency inreach, before major changes can be implemented. These plans will give METRO leadership the ability to work out the details of each strategy and to maximize benefits and minimize drawbacks of each strategy before implementation.

Implementation/Design

Some strategies, like the fixed-route network redesign, can advance directly to implementation immediately after completion of detailed plans. Other strategies, particularly those involving facility development or technology acquisition, may require design, permitting, acquisition, or construction phases prior to completion.

Evaluate

Strategies will be evaluated at appropriate intervals after implementation based on detailed, criteria that reflect METRO's goals and values, and the goals and objectives of this plan and subsequent planning efforts.

Refine

Based on the outcome of the evaluation, the programs and initiatives that arise out of the strategies will be modified to correct any shortcomings or to improve their performance. This evaluation-refinement may be repeated indefinitely at regular intervals to ensure that programs continue to meet objectives and reflect current priorities.

METRO leadership will use the Action Matrix to guide and track progress of the various strategies over the next ten years. It will be a fluid and flexible document that allows the agency to react to uncertainties, adjust course as necessary, while still staying on track towards achieving the ultimate goal of becoming Summit County's regional mobility provider.

Legend for Action Matrix

- Improve Service Quality and Cost Effectiveness
- Implement Innovative Service Approaches
- Expand Collaboration with Community Partners
- Create Economic Opportunity

CEO: Chief Executive Officer
CCMS: Customer Care & Mobility Solutions
EEC: Employee Engagement Center
FIN: Finance Department
MAIN: Maintenance
OPS: Operations
PR&M: Public Relations & Marketing
PSD: Planning & Strategic Development
S&P: Safety & Protection/ Chief of Police
ALL: All Departments

ID	Task Name	Quick Win	Start	Finish	Predecessor ID	Goals	Gaps and Opportunities	Public Input and Preference	Departments
1	**Rebrand METRO as Summit County's regional mobility provider**		**Jan. 2021**	**Dec. 2024**			State of the System 3, 4, 6 Market Analysis 1 - 3	Stakeholder Outreach 1-6 Employee Inreach 1, 4	**PR&M, ALL**
1.a	Develop and execute marketing and outreach strategy and timeline	✓	Jan. 2021	Sept. 2021					PR&M
1.b	Deepen community partnerships to understand needs and support local and regional plans		Jan. 2021	Dec. 2024					CEO, CCMS PR&M , PSD
1.c	Develop targeted education and outreach approach for new operational strategies		Apr. 2021	Dec. 2022	2.d, 2.e				CCMS, PR&M PSD
2	**Revise Overall Operational Strategy**		**Jan. 2021**	**Ongoing**	**2.b**		State of the System 1-6 Market Analysis 1-3	Stakeholder Outreach 1-7 Employee Inreach 1, 4-6 Public Outreach 1-5	**OPS, CCMS PSD, MAIN**
2.a	Update Service Delivery Standards	✓	Jan. 2021	Aug. 2021					PSD, CCMS, OPS
2.b	Perform Comprehensive Operational Analysis (COA)/ Create Transit Development Plan (TDP)		Mar. 2021	Aug. 2022	2.a				CCMS, FIN, OPS, PR&M, PSD, MAIN
2.c	Operationalize Fixed Route Redesign		Jan. 2021	Dec. 2028	2.b				PSD, OPS PR&M, CCMS
2.c-1	Adjust service per outlined schedule in TDP		Mar. 2022	Dec. 2022	2.b				CCMS, OPS PR&M, PSD
2c-2	Prioritize Corridors for Enhanced Service/BRT (study and implement)		Mar. 2021	Dec. 2028	2.b				PSD, OPS MAIN
2.c-3	Perform Bus Stop Optimization: enhance amenities on key corridors and areas for new mobility connections	✓	Jan. 2021	Dec. 2022	2.a				PSD, OPS, MAIN
2.c-4	Work with community partners to increase pedestrian connections		June 2021	Oct. 2024	2.c-3				PSD, S&P
2.d	Implement New Mobility Strategies		Jan. 2021	Mar. 2022	2.b				CCMS, OPS, PSD
2.d-1	Identify markets for NMPP and establish program goals, as developed in TDP	✓	Mar. 2021	Aug. 2022	2.b				PSD, CCMS, OPS
2.d-2	Implement pilot program(s) as proposed in COA/TDP		Jan. 2022	Aug. 2022/ ongoing	2.d-1				CCMS, OPS, PSD
2.e	Realign Demand Response Programs		Mar. 2021	Dec. 2024	2.b				CEO, CCMS, OPS, PSD
2.e-1	Evaluate existing program guidelines and establish program goals	✓	Mar. 2021	Jun. 2022					CCMS, OPS, PSD
2.e-2	Develop proposed changes to program guidelines		June 2022	Aug. 2022	2.b				CCMS, OPS, PSD
2.e-3	Rollout new program to ensure gradual transition of existing users where necessary		Aug. 2022	Dec. 2024	2.b				CCMS, OPS, PR&M PSD, MAIN

ID	Task Name	Quick Win	Start	Finish	Predecessor ID	Goals	Gaps and Opportunities	Public Input and Preference	Departments
3	**Implement strategies to promote METRO's financial stability**		**Mar. 2021**	**Jun. 2023**			State of the System 1, 2, 6	Stakeholder Outreach 1-3 Employee Inreach 1 Public Outreach 5	**MAIN, OPS PSD, FIN**
3.1	Update Financial Policies and set controls	✓	Mar. 2021	Aug. 2022					FIN
3.2	Develop and maintain 5-year capital plan		Aug. 2022	Jun. 2022	3.1,6.2				FIN, PSD, MAIN
3.3	Maximize new and existing funding sources from Federal, State, Local and private sources		May 2021	Aug. 2021	2.c, 7.2				FIN
3.4	Create goals and execute measures for controlling operating cost growth	✓	May 2021	Aug. 2021	3.1				FIN
3.5	Update Fare Policy to provide fair, equitable and consistent passenger fares		Jan. 2022	Mar. 2022	2.b				FIN, PSD, CCMS PR&M
3.6	Perform Fare equity analysis		Aug. 2022	Mar. 2023	2.b				FIN, PSD
3.7	Determine best integrated solution for fare collection (cash, contactless, cashless, passes)		Aug. 2022	Jun. 2023	3.6				FIN, PSD, MAIN OPS
4	**Realign and develop METRO's organizational structure to meet evolving administrative and operational needs to support becoming "Mobility Provider"**		**Jan.2021**	**Sept. 2021**			State of the System 1-6 Market Analysis 1-3	Stakeholder Outreach 1-7 Employee Inreach 1, 4-6 Public Outreach 1-5	**CEO, ALL**
4.1	Review organizational structure to consider impacts of changes to organizational focus		Jan.2021	Sept. 2021	4				CEO, EEC
4.2	Outline internal processes and identify opportunities to improve efficiency and communication		Jan.2021	Sept. 2021	4.1				CEO, EEC PR&M, ALL
4.3	Update employee policies and procedures to ensure "Outstanding Workplace"	✓	Jan.2021	Sept. 2021	4.1				EEC, PR&M, ALL

ID	Task Name	Quick Win	Start	Finish	Predecessor ID	Goals	Gaps and Opportunities	Public Input and Preference	Departments
5	**Implement sustainable fleet and facility improvements**		**Dec. 2021**	**Jan. 2025**	**2.b**		State of the System 2, 9	Stakeholder Outreach 7 Employee Inreach 1-7	**MAIN**
5.1	Update recent facility needs assessment to account for future needs (passenger, operations, maintenance, administration, TOD integration)		Dec. 2021	Aug. 2022	2.b, 7.2				MAIN, OPS, PSD FIN, S&"
5.2	Identify partners for potential joint use or joint development where potential mutual benefit of new facilities exists		Dec. 2021	Dec. 2022	7.2				PSD
5.3	Build new maintenance facility to meet current and future needs - including supporting expanded alternative-fuel vehicles		Jan. 2021	Jan. 2025	3.2,3.3				MAIN, FIN, OPS
5.4	Set Goals for Alternative Fuel Balance		Jan. 2022	Dec. 2022					MAIN, OPS, CEO
5.5	Develop fleet and facility plan based on fleet replacement needs and future plans as indicated in the COA (network redesign-BRT-new mobility, demand response changes, alternative fuel goals)		Jan. 2022	Aug. 2022	5.5				MAIN, OPS, PSD FIN
6	**Advance innovative approaches and new technology to support agency initiatives**		**Mar. 2021**	**Sept. 2022**			State of the System 1-6 Market Analysis 1-3	Stakeholder Outreach 1-7 Employee Inreach 1, 4-6 Public Outreach 1-5	**FIN, EEC, ALL**
6.1	Engage Project Manager/Technology Officer to Lead Review of Internal Technology/Processes	✓	Mar. 2021	Sept. 2022					FIN, EEC
6.2	Draft Technology Development Plan		Aug. 2021	Sept. 2022	6.1				FIN
6.3	Conduct technology audits to periodically update technology and identify ways to use technology to improve performance and efficiency		Sept. 2022	Every two years	6.2				FIN, S&P

ID	Task Name	Quick Win	Start	Finish	Predecessor ID	Goals	Gaps and Opportunities	Public Input and Preference	Departments
7	**Pursue Transit-Oriented Development opportunities and innovative property management**		**Jan. 2021**	**Ongoing**			Market Analysis 1, 2, 4, 5	Stakeholder Outreach 1-5, 7	**PSD**
7.1	Establish TOD Working Group to promote transit-oriented development in METRO service area	✓	Jan. 2021	June 2021					PSD
7.2	Examine opportunity for TOD Near RKP and other key sites with HOPE Grant Funding		Mar. 2021	Aug. 2022	7.1				PSD
7.3	Pursue FTA TOD Planning Grant to perform TOD Market-Feasibilty Analysis along prospective BRT corridors		Mar. 2023	Oct. 2023	7.2				PSD, FIN
7.4	Pursue TOD projects with partners		Aug. 2022	Ongoing	7.2				PSD, MAIN, OPS FIN
7.5	Determine a strategy for proactive property management and development		Jan. 2022	Aug. 2022	7.2				PSD, FIN, S&P
8	**Actively monitor agency performance and ensure accountability with goals of Strategic Plan**		**May 2021**	**Aug.2021/ ongoing**			State of the System 1, 3-6, 10	Employee Inreach 3, 6 Public Outreach 2, 3	**CEO**
8.1	Connect KPI's to the Goals of the Strategic Plan	✓	May 2021	Aug.2021					CEO, FIN, ALL
8.2	Incorporate Strategic Plan goals/objectives in annual budget process		May 2021	Nov.2021	8.1				CEO, FIN
8.3	Measure and evaluate organizational alignment to Strategic Plan framework semi-annually		Dec. 2021	Every six months	8.1				CEO, ALL