



Memorandum

DATE: March 20, 2019

TO: Board of Directors

FROM: Jim Derwinski *JMD*
CEO/Executive Director

SUBJECT: Station Optimization Draft Station Evaluation Policy

RECOMMENDATION

Staff will present a Draft Station Optimization Station Evaluation Policy for board review and feedback. Staff also requests concurrence to post the draft policy on Metra's website to obtain public feedback, with the intent of bringing a policy to the board for adoption at a future Board meeting.

BACKGROUND

As part of Metra's Strategic Planning process, staff was directed to review all of Metra's stations and recommend strategies to better utilize Metra investments in existing and future stations, balance the mobility needs of the communities we serve with our obligation to utilize the agency's resources in an efficient way. Station Optimization is one of the initiatives outlined in Metra's Strategic Plan, and supports two of the plan's goals: Optimize our capital assets and Ensure financial stability. Through a detailed analysis of station characteristics and performance, staff developed a draft policy. The policy sets forth a plan to review each station on at least a biennial basis and focuses efforts on stations with lower ridership levels. The main goals are to increase ridership and improve the customer experience, as well as, build community support for Metra stations. The policy is a guide for developing initiatives to improve ridership for low performing stations, working with the community and key stakeholders on station support. The policy also identifies a plan of action for working with the community for stations that are not able to improve ridership. Ongoing evaluations of stations will support faster travel times, improved station condition, increased ridership, and reduced station costs.

In addition to evaluating existing stations, the draft policy also provides guidance for consideration of new/infill stations. Proposals for new points of access to the Metra system need to weigh the potential benefits to new riders against the potential drawbacks for existing riders before they can proceed.

Attached to this memo, you will find two policy flow charts. They outline: (1) the process of ongoing station evaluation for existing stations and (2) the process by which proposals for new/infill stations on existing lines will be considered and evaluated. These are formalized in a Draft Station Evaluation Policy that is also attached for your review.

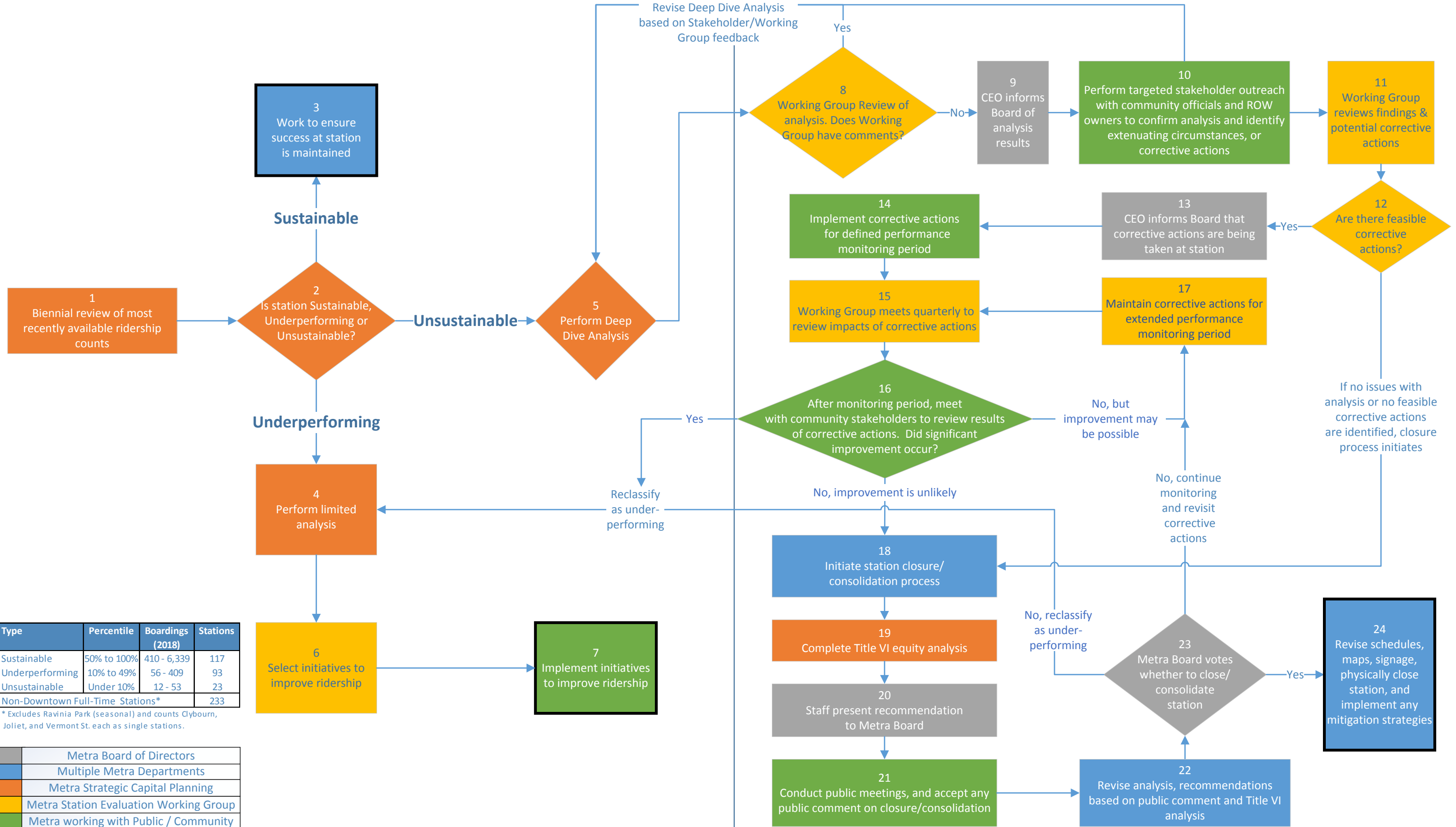
Attachments: Station Evaluation Policy Flowcharts
Draft Station Evaluation Policy

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Station Evaluation Process for Existing Stations (ES)

Existing Station Analysis

Existing Station Decision Process

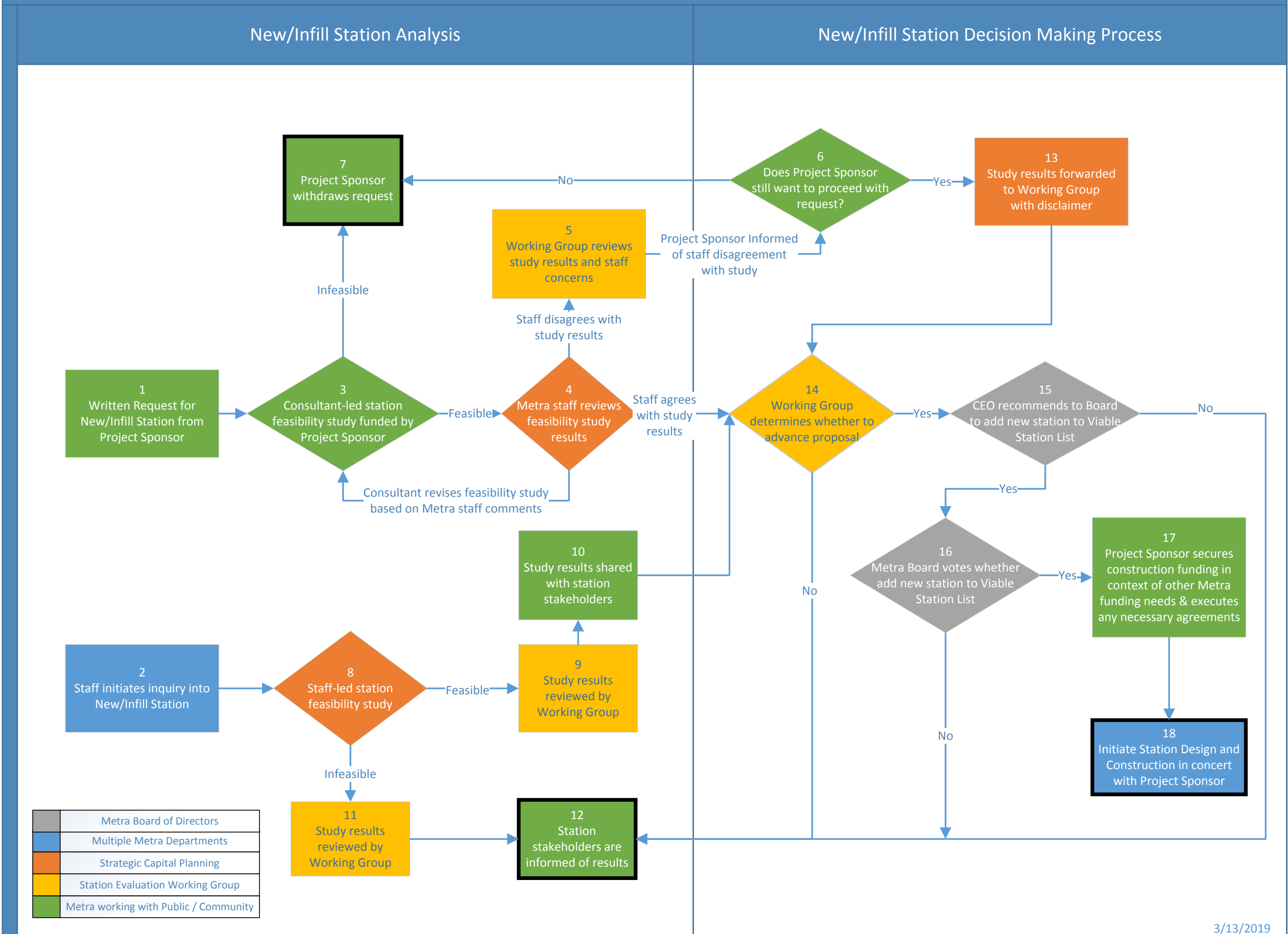


Type	Percentile	Boardings (2018)	Stations
Sustainable	50% to 100%	410 - 6,339	117
Underperforming	10% to 49%	56 - 409	93
Unsustainable	Under 10%	12 - 53	23
Non-Downtown Full-Time Stations*			233

* Excludes Ravinia Park (seasonal) and counts Clybourn, Joliet, and Vermont St. each as single stations.

	Metra Board of Directors
	Multiple Metra Departments
	Metra Strategic Capital Planning
	Metra Station Evaluation Working Group
	Metra working with Public / Community

Station Evaluation Process for New/Infill Stations (NS)



Background

The Regional Transportation Authority Act notes the importance of “an adequate, efficient, geographically equitable and coordinated regional transportation system that is in a state of good repair.” Accordingly, this policy establishes evaluation measures to optimize Metra stations to increase their productivity. It will help identify changes that can be made in the hopes of improving station ridership at Metra’s lowest performing stations, opportunities for community and stakeholder partnerships, and it will guide decision making on matters of station closure/consolidation and the feasibility of new infill stations. This policy is intended to support Metra’s mission of providing safe, reliable, and efficient commuter rail service that enhances the economic and environmental health of Northeastern Illinois, while ensuring financial sustainability through optimal use of fiscal resources.

Defining Sustainable, Underperforming, and Unsustainable Stations

Metra staff shall conduct an assessment of all commuter rail stations on a biennial basis (every two years).

Stations with weekday boardings exceeding the median of the most recent Metra station ridership counts will be considered “**Sustainable**” stations.

Stations with weekday boardings below the median of the most recent Metra station ridership counts, but above the bottom 10 percent of all stations, will be considered “**Underperforming**” stations and will be subject to additional analysis. (According to the 2018 boarding and alighting count, the median number of weekday boardings is 410. At the 23 stations in the bottom 10 percent of weekday boardings, boardings are 53 or fewer.) This methodology will always classify a significant number of stations as Underperforming; however, identifying a station in this way is the first step in a process designed to increase rider utilization of all stations.

Stations with weekday boardings in the bottom 10 percent of all Metra stations, based on the most recent Metra station ridership counts, will be considered “**Unsustainable**” stations. Unsustainable stations will be subject to additional analysis. Stations with weekday boardings below the Unsustainable station ridership threshold that serve key attractions and/or special events will not be considered Unsustainable unless further analysis of ridership, surrounding transit options, and financial considerations indicate a lack of sustainability.

Initiatives at Underperforming Stations

For Underperforming stations, the Station Evaluation Working Group will identify and implement initiatives to improve ridership. The Station Evaluation Working Group will meet quarterly, and will be comprised of representatives from a variety of departments within Metra.

Analysis of Unsustainable Stations

Unsustainable stations will be subject to additional analysis, and findings presented in a written report. The analysis will consider the following elements: past, present, and forecasted ridership; station area demographics, land use and future plans; service characteristics; nearby transit alternatives; station condition and investment needs; and budget impacts of the station's operation and physical plant.

The analysis will be data-driven and aim to quantify factors to the maximum extent practicable. Visual elements such as maps, graphs, and images will be used to support the analysis wherever possible. Working in concert with the community, a set of recommendations and potential initiatives or corrective actions will be developed to increase ridership, based on the analysis results. If more than two years has elapsed since a station analysis was completed, the previous report should be updated with the most recent data available.

Decision-Making Process for Unsustainable Stations

Recommendations and potential initiatives or corrective actions to be taken to increase ridership resulting from the analysis of Unsustainable stations will be further evaluated by the Station Evaluation Working Group and the community. The procedures allow for professional judgment of unique circumstances, such as a station's ability to serve a key destination or special event, while ensuring that the station recommendations are based on a technical assessment. The Station Evaluation Working Group and the community will review the results of the analysis described above, provide feedback, and determine how to proceed with the recommendation.

The Metra Board will be informed of the results of the analysis of the Unsustainable stations. A meeting will be held with community stakeholders to confirm the analysis results and identify extenuating circumstances, and develop potential initiatives or corrective actions. If one or more potential initiatives or corrective actions to improve station performance are identified and deemed feasible, those actions will be implemented for a defined period of time. The Station Evaluation Working Group will monitor the impacts of the actions. After the monitoring period, the results will be shared with community stakeholders for further review and possible refinement. If the corrective actions significantly improved station ridership, it is reclassified as underperforming. If the corrective actions did not significantly improve station ridership, but improvement may be possible, the monitoring period is extended and corrective actions continue. If no feasible corrective actions are identified, or if the corrective actions did not result in significant improvement at the station and future improvement is deemed unlikely, Metra will work with the community on possible station closure or consolidation.

For stations in the closure/consolidation process, Metra will complete a Title VI equity analysis, which will be followed by a presentation to the Metra Board, public meetings, and consideration of public comments on the proposed closure/consolidation. For a station to be closed or consolidated, the Metra Board must vote to approve the action. If the Metra Board does not vote to close or consolidate a specific station, it can either be reclassified as Underperforming or the monitoring period can be extended while corrective actions continue. If the closure/consolidation is approved, maps, signage, and schedules will be adjusted, and the identified mitigation strategies will be implemented.

Evaluating Proposed New Infill Stations

When a new infill station is proposed (i.e., a new station on an existing Metra line, between existing Metra stations)—by Metra staff, or in writing from a potential Project Sponsor (e.g. municipality, elected official, or developer) —a feasibility analysis will be conducted by the Project Sponsor that evaluates the proposed station. Findings will be presented in a written report to Metra Station Evaluation Working Group, with a recommendation of whether or not the proposed station is feasible. The analysis will consider the following elements: station spacing; travel market, including the station’s anticipated ability to achieve the system median level of station boardings within 10 years of opening; host railroad concerns; impact on operations and existing riders; station access; land availability; potential environmental concerns; estimated capital and operating costs; and anticipated funding sources. The study will also include public involvement to gauge community support for the proposal. New stations need to conform to all Metra standards for design, safety, and accessibility. The analysis will be data-driven and aim to quantify factors to the maximum extent practicable. Visual elements such as maps, graphs, and images will be used to support the analysis wherever possible.

Process for Decision-Making and Opening Proposed New Infill Stations

Recommendations resulting from the analysis of proposed new infill stations will be further evaluated by Metra’s Station Evaluation Working Group. These procedures allow for professional judgment of unique circumstances, while ensuring that the recommendation and decision to open a station is based on a technical assessment.

The Station Evaluation Working Group will review the feasibility analysis and confirm that it meets Metra standards for accuracy and rigor and included public participation in the development of the study. If the analysis determined the proposed station to be feasible, the Station Evaluation Working Group will recommend to the CEO/Executive Director that the proposed new infill station be classified as viable. The CEO/Executive Director may recommend to the Metra Board that the station proposal be added to a list of viable stations, followed by a Board vote on whether or not to add the proposed station to the Viable Station List. If the station is added, the Project Sponsor will need to secure funding for the project. Once funding has been secured, Metra will execute any necessary agreements with Project Sponsors. Construction of stations on the Viable Station List is subject to funding availability and design and construction timelines.

If the Station Evaluation Working Group determines that the feasibility study itself is deficient, the Project Sponsor will have the opportunity to revise the report. If the feasibility study determines that the station is not feasible, or the Metra Board declines to add the station to the Viable Station List, station stakeholders will be informed that Metra will not move forward with the proposal.