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**November 2, 2017**

**TO: POLICY ADVISORY COUNCIL**

**FROM: THERESE W. MCMILLAN**   
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**SUBJECT: Use of Performance Measures to Support Measure M  
MSP 5 Year Plan Development and Implementation**

### **ISSUE**

This memo describes three alternatives as to how performance measures could be used by the subregions as part of the Measure M Multi-year Subregional Program (MSP) 5 Year Plans.

### **BACKGROUND**

Through the review of the Draft Measure M Guidelines the Policy Advisory Council (PAC) raised the issue of adding performance measures to the Measure M Administrative Policies to be used to develop and evaluate the implementation of Multi-year MSP 5 Year Plans. The PAC has discussed how performance measures could be used as part of the MSP program at their September and October meetings in addition to a conference call on the topic between those meetings. The questions framed by the PAC after the September meeting were:

1. Who sets the Performance Measures?
2. Countywide or Sub-regional?
3. MSP Program Measures or Individual Project Measures?
4. How are the Performance Measures applied to project selection?

Following the PAC discussion at the meetings and conference call, the following consensus and non-consensus points were framed:

### **PAC Member Consensus Items**

- Use the five Metro-adopted performance measure themes (Mobility, Economy, Accessibility, Safety and Sustainability) as a starting point for the PAC to discuss the further development of performance measures to support the development of Measure M MSP 5 Year Plans.

- Subregions could self-select projects to include in their MSP 5 Year Plans (Plan) using performance measure to articulate the performance of the Plan to the public and Metro.
- Performance measures can be both qualitative and quantitative.
- Performance measures should provide transparency and accountability to the public/voters that MSP programs are consistent with the Measure M Ordinance.

### PAC Member Non-Consensus Items

- Who sets the performance measures and determines the level of analysis?
- Performance measures should be consistent countywide and subregions can apply unique “weights” to each measure.
- Should performance measures be used to select projects, track performance or both?
- How or when are the Performance Measures communicated to stakeholders and public?

Some degree of consistency between goals or measures is preferable if some assessment of improvements within a subregion or across the county is desired. At a minimum, the measures must be able to articulate the benefits of the 5 Year Plan and demonstrate project performance as part of the community engagement process.

### Three Options for Performance Measures for Measure M MSP 5 Year Plans

The breadth of non-consensus items suggests that there is a fairly wide field of recommendations that the PAC could consider as part of bringing the MSP Administrative Procedures to closure. Note the Metro staff would need to recommend one course of action for administrative consistency. However, should there not be consensus on a way forward, the PAC could present its view to the Board on this subject in advance of the staff’s final administrative target of December 2017.

Reflecting the outstanding positions we have heard, below are three approaches to determining the performance measures for the MSP 5 Year Plans the PAC may consider, in descending order of complexity:

#### **1. Countywide Quantitative Measures**

Under this scenario the Metro Board would adopt a list of quantitative performance measures to be applied by subregions during the development of all MSP Plans countywide.

The attached Technical Memo summarizes the technical rigor and resources required to perform the level of project analysis which was applied when Metro

analyzed projects for inclusion in Measure M. Major highway projects (e.g., carpool lanes, managed lanes, and mixed-flow lanes) and transit projects (e.g., bus rapid transit, light rail, and heavy rail) were evaluated separately for the project-level performance analysis utilizing the Metro Travel Demand Model (TDM) and Geographic Information System (GIS) analysis tools. Projects and programs not included in the major highway and transit performance assessment were analyzed by performance theme using the qualitative “Harvey Ball” scoring system established through the Subregional Mobility Matrix processes in 2015.

This is not to suggest this Measure M evaluative approach is warranted as an application to the MSP process. In fact many aspects are not transferable. However it does illustrate the level of effort required for this suggested evaluation.

## 2. Defined Subregional Qualitative Measures

Under this scenario subregions would apply qualitative performance measures from a list of performance measures that would be included in the Measure M MSP Administrative Procedures. The subregion would have to articulate the benefits of the 5 Year Plans including a description of how the projects will achieve the thematic goals established by the Measure M MSP Administrative Procedures.

If this scenario was to require a specific approach for applying performance assessment under the Administrative Procedures, the Metro Board would need to take action making that so.

### Draft Subregional Qualitative Performance Measures

| Theme                                       | Provide responses to how the project achieves the following outcomes, if any:   |
|---|---|
| <b>Mobility</b>                             | <ul style="list-style-type: none"> <li>• Relieve congestion</li> <li>• Increase travel by transit, bicycle and pedestrian modes</li> <li>• Improve travel times</li> <li>• Improve effectiveness &amp; reliability for core riders</li> </ul>               |
| <b>Economic Vitality</b>                    | <ul style="list-style-type: none"> <li>• Increase economic output</li> <li>• Support job creation &amp; retention</li> <li>• Support goods movement</li> <li>• Reduce household transportation costs</li> <li>• Extend useful life of facilities</li> </ul> |
| <b>Accessibility</b>                        | <ul style="list-style-type: none"> <li>• Improve transportation options</li> <li>• Improve service to transit dependent, low-income, and disadvantaged populations</li> <li>• Improve first-last mile connections to transit</li> </ul>                     |
| <b>Safety</b>                               | <ul style="list-style-type: none"> <li>• Reduce incidents</li> <li>• Improve personal safety</li> </ul>   |
| <b>Sustainability &amp; Quality of Life</b> | <ul style="list-style-type: none"> <li>• Improve environmental quality</li> <li>• Improve public health</li> <li>• Improve quality of life</li> </ul>   |

### **3. Voluntary Subregional Established Performance Measures**

This scenario would allow, but not require, subregions to develop and apply their own qualitative and/or quantitative metrics. At a minimum the subregion would have to articulate the benefits of the 5 Year Plan including a description of how the projects will address the thematic goals established by the Measure M Administrative Procedures. Should a subregion elect to pursue a more specific performance-based analysis, they could certainly draw upon the suggested measures outlined in Option No. 2 above.

The decision to apply or not apply performance-based analysis would have to be clearly articulated in the 5 Year Plan, and communicated as part of the public participation process leading up to the Plan's adoption.

#### **NEXT STEPS**

##### PAC Comments

Any comments on the Measure M MSP 5 Year Performance Measures should be forwarded to [MetroPAC@metro.net](mailto:MetroPAC@metro.net) by 5:00 pm, Tuesday, November 21, 2017.

Attachment A – LRTP Tech Memo – Performance Measures Methodology