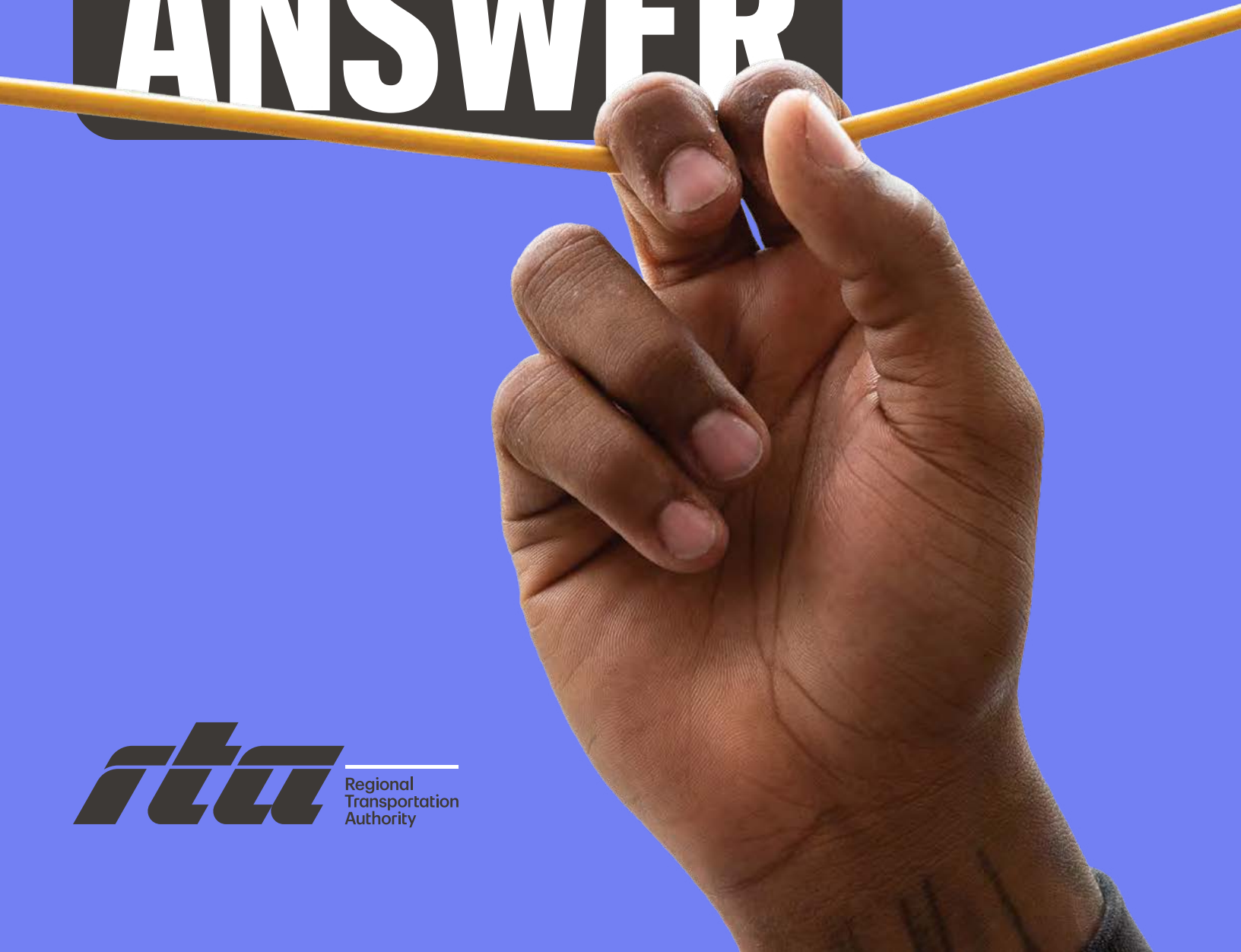


# TRANSIT IS THE ANSWER





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# It's a Time of Great Change and Transit is Ready

Trains, buses, and paratransit have been part of the social and economic fabric of Chicago and the surrounding communities in the six-county RTA region for over 100 years. Like our Great Lake, innovative architecture, and magnificent human diversity, our transit system is what makes us who we are. Millions have stepped from platforms and sidewalks onto trains and buses with fellow riders that have a common purpose: To go somewhere. Generations have taken part in the daily ritual of a bus ride home after a long workday or jumped onto a train with enthusiasm en route to a weekend outing. If you've lived in or visited Chicago or a surrounding town or village, chances are that you've ridden a train or bus, or spotted one passing by. Public transportation is so much a part of the culture, community, and landscape for many towns that it's easy to take for granted.

**Transit, like so many parts of our society,  
has been through a lot over the last three years.**

The public transit system in Northeastern Illinois and those serving other large urban areas would have collapsed — victims of the pandemic — had transit workers not gotten up each day to do their jobs so that other workers going to hospitals and factories and food stores could get to work and had the federal government not recognized transit as essential to the nation's social and economic viability. The region learned during the pandemic that ridership alone is not the only measure of the system's value, and that there was value in moving essential workers and people making essential trips (medical, grocery shopping, childcare, etc.).

Cities and large urban areas are taking a leadership role in making commitments to equity, inclusive economic growth, sustainability, and resiliency. Public transit usage during the worst of the pandemic demonstrated why buses and trains are still a necessary part of our social and economic fabric. As the City of Chicago and many other communities in the region gear up for lowering transportation emissions and fostering inclusive economic growth, transit is going to be a central part of achieving these goals. Transit has survived the pandemic, but ridership — and with it, revenue from fares — sustained precipitous declines and has not returned to pre-COVID levels. Related economic shifts and other factors have resulted in a system more vulnerable to violent crime, and labor shortages have impacted every aspect of service. As a result, the transit system is not serving riders as well as it could or should. Meanwhile, the regional sales tax that historically represents about 40% of operations funding has performed well during the pandemic. Sales taxes and federal emergency relief money will keep the region's trains and buses running into 2025, when our system encounters a fiscal cliff. If the current funding model that is reliant upon fares is not changed and additional funding is not secured, the transit agencies will face an existential crisis that neither fare hikes or service cuts can solve.

**But we know the future does not have to be so dire. The importance of transit to the region — and an unthinkable prospect of shrinking the system — has focused our region's collective minds on a plan to preserve transit and improve it for current and future riders, and a way to meet the region's larger goals on equity, climate, the economy, and more.**

The RTA has spent the last year listening to thousands and working with hundreds of people who ride and are passionate about our region's transit system to look at public transit in a new way, as a key link in our social infrastructure and a foundation underpinning Northeast Illinois' massive, diversified economy. In this process, we have worked to center the voices of riders. Essential workers were consistent riders during the pandemic, having long relied on the transit system to meet their everyday needs, and within their experiences and expertise about the system lay the strategies to improving transit for everyone.

The unprecedented nature of the past few years made it clear that the RTA could not conduct this planning process alone. The agency committed itself to change and to more deeply engage our region's diverse communities than it had ever done prior. A process that began as public engagement became one of co-creation. The collective wisdom of our region's riders revealed expectations for public transit to be an agent of change in answering long-postponed regional questions of: equal access to opportunity; equitable alignment of services; and how to unify the region in a connected, safe, and reliable transportation network that leads in the fight against climate change. They see transit as the answer, and this action and advocacy plan reflects the region's diverse voices.

The RTA has heard this input and has worked with the Service Boards, partners, and stakeholders to advance a comprehensive Agenda for Advocacy and Action that is described later in this document. The Agenda is extensive and includes many supportive activities that will be undertaken by the RTA, the Chicago Transit Authority (CTA), Metra, Pace, and the Chicago Metropolitan Agency for Planning (CMAP).



# ACTIONS FOR SUCCESS



## Take affirmative steps forward to secure increased funding for transit operations and make the system less reliant upon fare revenue through:

- Executing a broad public outreach campaign of education about transit funding and continuing to engage a coalition that will secure sustainable, ongoing funding.
- Collaborating with regional partners to identify funding options and developing revenue proposals.
- Obtaining continued recovery ratio relief from the Illinois legislature while developing permanent funding structural reform.



## Deliver a set of new regional transit initiatives that will make the system better for riders including:

- Convening a region-wide, cross-sector safety and security summit to facilitate information sharing and explore holistic solutions to the challenges affecting transit.
- Seeking funding to pilot an expanded regional free or reduced fare program available to people experiencing low incomes to make the system more affordable and advance understanding about the barriers that fares present to riders.
- Commissioning an independent review of the accessibility and quality of rider communication, signage, and information-sharing across and between agencies.



## Collaboratively begin development of three regional action plans to program investments that support a thriving region including:

- A regional blueprint for improved accessibility that builds upon existing Service Board plans and provides a comprehensive inventory of capital projects and supporting infrastructure improvements needed to achieve a fully accessible regional transit system.
- A regional transit climate action plan that builds upon existing Service Board plans and identifies how transit can support the region's climate action goals, outlines regional strategies that will encourage more people to ride transit, and charts a course to reduce the footprint of the transit system and move toward zero-emissions for transit operations.
- A transit-friendly communities policy, updating the RTA's Setting the Stage for Transit report, to set standards for communities that host transit services and hold them accountable for land-use decisions and improving access to transit to ensure that our riders can travel safely and efficiently.

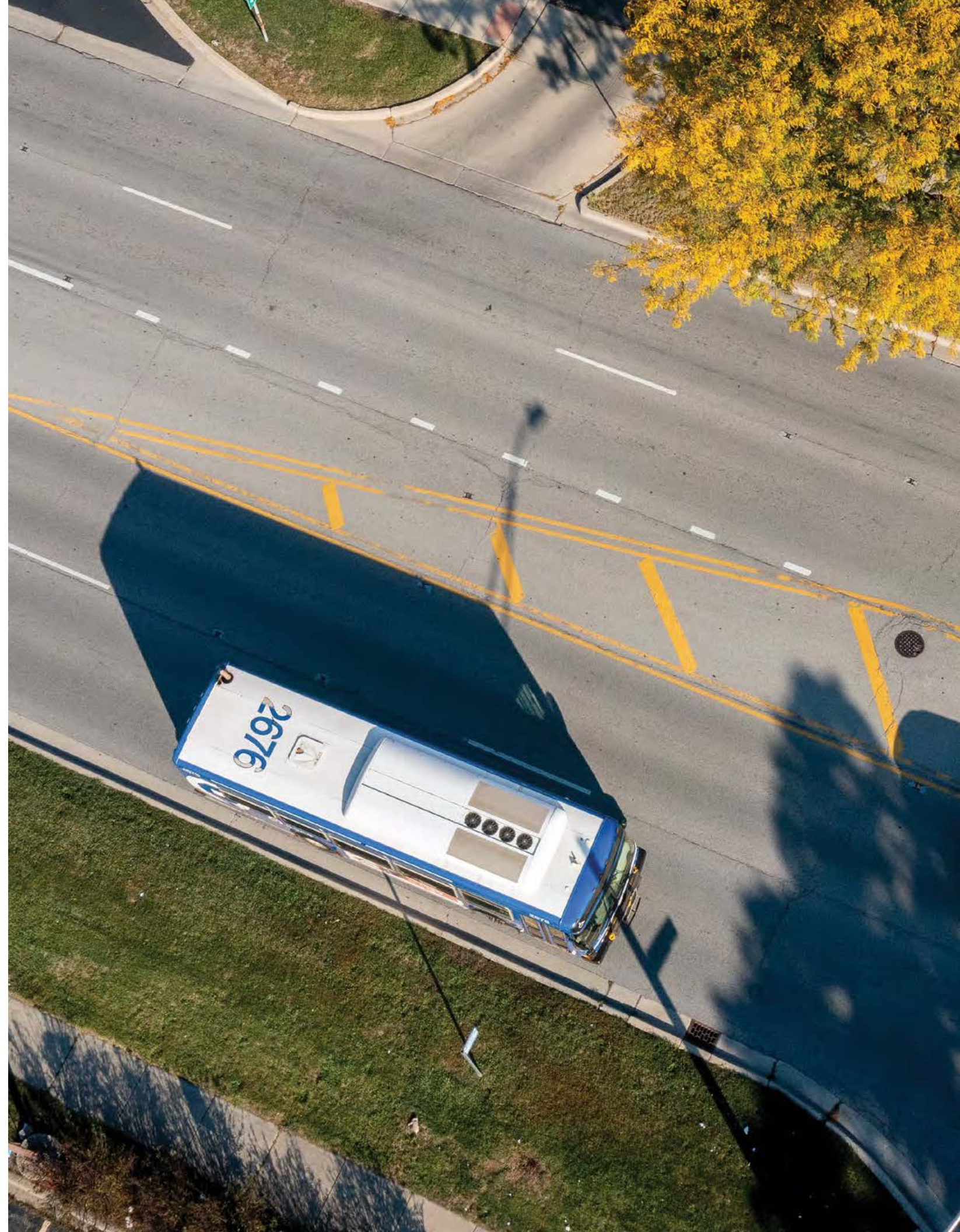
The RTA and the Service Boards will work together in 2023 on a number of actions central to transit's long-term success. These tasks will be undertaken jointly by the agencies, in addition to and in collaboration with other activities outlined in key plans issued by all three agencies recently including:

- CTA's customer-focused "[Meeting the Moment: Transforming CTA's Post-Pandemic Future](#)" Action Plan ("[Meeting the Moment Action Plan](#)") released in August 2022 that includes strategic initiatives designed to immediately respond to riders' most pressing challenges.<sup>1</sup>
- Metra's new strategic plan "[My Metra, Our Future](#)," released for public comment in October 2022, that includes a revised vision, mission, and goals for the agency and will serve as a roadmap to the future of Metra.<sup>2</sup>
- Pace's current strategic vision "[Driving Innovation](#)" adopted in September 2021 that establishes major planning and policy initiatives and priorities for the coming years.<sup>3</sup>

Transit is the Answer also builds upon the collaboration and successes that resulted from Invest in Transit, the 2018–2023 Regional Transit Strategic Plan adopted by the RTA Board in January 2018. Invest in Transit underscored the importance of sustainable capital funding in achieving strategic goals and outlined several priority projects that would be advanced with additional capital funding. The plan guided the collective work of the transit agencies and yielded success with the passage of a major state capital bill, Rebuild Illinois, in 2019. Under state law, the RTA Board is required to adopt a strategic plan no less than every five years, so Transit is the Answer has been developed as the next plan.

The RTA appreciates the feedback and input received during the plan development process, including through public comment on the draft, and we look forward to continuing to engage with riders, stakeholders and our broader audiences during implementation.

Read on to learn more about how transit is the answer to many of the region's challenges, and how you can stay involved as we move forward with an Agenda for Advocacy and Action.



# RTA REGION'S TRANSIT SYSTEM

The economic dynamism created within this region occurs in less than a tenth of the state's total area. Without transit and the connections that it enables, this level of economic activity would not be possible.<sup>4,5</sup>

Percentage of the Area of Illinois

Size in Square Miles

**1/10**    **3,700**

Regional Population

**8.3 million**

Total Jobs within Region

**4.2 million**

Percentage of Economic Activity in Illinois, 2019

**74%**

Our transit system is an economic differentiator for the region — linking talent to opportunities, building economic resilience, and spurring growth.<sup>6</sup>

## Regional Riders

### Andrea Reed

Executive Director, Greater Roseland  
Chamber of Commerce  
Metra Electric rider

“Roseland is a beautiful community with a rich history. People might not know much about it because it gets buried under the disinvestment that has happened for decades, but it was once considered the jewel of the South Side. It was a shopping mecca; people would come from all over to visit Roseland. We have 77 community areas in Chicago, and I have visited most of them, and you can see the disparity out there, it is blatant.”

“Transportation is an economic driver. It is the key that opens the door to many opportunities and resources that other people take for granted. It became very clear to me that transportation and the lack of transportation in certain areas, was deliberately done. People were actually cut off from access, and it really saddened me. I got involved with the Coalition for a Modern Metra Electric and worked with Cook County and other partners on the Fair Transit South Cook Pilot which has lowered fares for our communities. Our goal was to create opportunity for people who have suffered from lack of transportation and make public transit equitable, affordable, accessible, and seamless.”

“We need more people to be able to afford to use transit; it is a basic right. If we make transportation more accessible, and affordable and seamless, maybe more people would decide to leave their cars at home and take public transportation.”





# We're Charting the Future by Working Together

The scale, complexity, and existential nature of the challenges that our transit system is currently facing demanded a new, inclusive process to develop this strategic plan. The challenges are too great for any one agency or organization to tackle on its own, and the RTA believes that it is only through coalition building — mutual learning and agenda setting — that we can rise to meet the moment. The RTA is committed to change, and the process we have followed over the past 18 months reflects that commitment. Every aspect of the plan, including its vision, principles, and action items have been created through collaboration and engagement with thousands of diverse voices.

This engagement strategy had two long-standing, guiding principles: transparency and accountability. While these principles have long been central to the RTA, the engagement process deepened and redefined how they are enacted at the RTA and in our regional planning processes.

## New Process, New Voices

We employed a big tent approach for this plan development process — engaging a diverse array of voices and perspectives from across the region to co-create the plan's priorities. In order to engage with a diverse array of stakeholders, we identified four key audiences and tailored our approach for each group.



- **Impacted public** represented current and lapsed riders, and residents of the six-county region the RTA serves. This group focused on those who are closest to transit and transit decisions across the region and have critically important lived experience, though not always deep technical transit planning knowledge. They were actively engaged across the planning process with a particular focus on asynchronous and in-person pop up engagement opportunities with clear ways for them to weigh in on their experience with transit across the region and follow progress.
- **Movers** were composed of regional and local planners, advocates, academics, chambers of commerce members, and local business staff. They were engaged in advance of decision points, through one-on-one conversations, regular meetings, and planning workshops. Movers offered both lived experience and subject matter expertise. Their buy-in and insight were important to shaping the strategic plan.
- **Influencers** were defined as the RTA leadership and staff, Service Board leadership and staff, and elected officials. This group helped shape priorities from the public and Movers into an actionable agenda that transportation agencies and elected officials can work together to implement in the coming years.
- **Decision makers** are members of the RTA Board of Directors and as such will ultimately affirm this plan through formal adoption. The decision makers were provided with regular updates during RTA Board meetings and participated in other engagement opportunities over the course of the planning process.

The strategic plan was developed over the course of 18 months across three main phases: we (1) listened; (2) co-created; and (3) coalesced. Each of these is explained in more detail below.

---

## 1. Listened

The goal of the listening phase was to gather and share initial input on the priorities, challenges, and opportunities that the plan should address. This phase included multiple, wide-ranging touchpoints including a guest blog series from transit thinkers around the country and region, a public forum held with the University of Illinois-Chicago, guest speakers at the RTA Board of Directors meetings, stakeholder workshops, and a public survey that received more than 1,500 responses. Key questions asked during this phase were:

- What is currently the greatest opportunity for impact that the strategic plan process should address?
- What types of transit system changes should be the focus of this process?
- Which key financial issues should be addressed through this process?
- What are some productive ways for RTA to define, understand, and incorporate equity during this process?

Engagement during the listening phase defined the vision, outcomes, and principles of the plan. These elements were used to hone the approach and key questions asked in later phases of the process. Before moving forward, we shared a draft of the outcomes, which we refined based on feedback and public comment from the RTA Board of Directors and the audiences of focus.

The listening phase made clear that this plan needed to leverage the region to solve problems that RTA was unable to tackle on its own, and to continue engaging a diverse range of stakeholders to embody the principles of the plan: stewardship, committed to change, and equity.

## Engagement Activities

- Board workshop in August 2021
- Guest speakers at the RTA Board of Directors meetings Fall 2021
- Guest blog series from transit thinkers around the country and region
- Public forum held with the University of Illinois-Chicago
- Public survey with partner promotion toolkit that garnered 1,500+ responses
- Stakeholder (“Movers” Group) workshop
- Social media, blog, and newsletter updates

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## 2. Co-Created

In response to the high level of interest seen in the Listening Phase and the strong sense of urgency and demand for an inclusive process that was expressed during that phase, RTA convened five working groups to examine key topics for the plan, identify priorities, and develop recommendations. It was important for RTA to work in partnership with diverse stakeholders and together build the goals and strategies that frame this plan. RTA offered stipends to any participant who requested it to ensure that they were compensated for their time and expertise. The RTA had experimented with using compensation to encourage diverse public participation through its Community Planning program but this was the first time it had been used as a tactic for inclusive engagement as part of a strategic plan process.

Working group meetings were carefully designed to create a productive and inclusive forum for discussion and cultivate a group of stakeholders that are knowledgeable about transit issues and potential solutions and can act as champions of the plan and its recommendations.

## Working Groups

- Two technical working groups on Capital Priority Projects and 10-Year Financial Plan

- › Groups were comprised of technical experts from RTA, the Service Boards, and CMAP.
- › Each group produced a technical memo outlining recommendations to be included in the final plan.
- Three stakeholder working groups on Transit Service, Financial Responsibility, and Infrastructure Investment
  - › Groups were comprised in total of 100+ individuals, representing 70+ organizations from across the region.
  - › Innovative engagement strategies were deployed including a working group hub website for document sharing, direct compensation (upon request) to individuals and organizations for participation, and feedback surveys following each meeting.
  - › Each group produced a memo summarizing recommendations to be included in the final plan.

### 3. Coalesced

Working group members generated hundreds of desired actions to improve the regional transit system and help deliver this plan’s vision for safe, reliable, accessible public transportation that connects people to opportunity, advances equity, and combats climate change. RTA conducted additional outreach to hear from people in each of the six counties of the region, learning about how and why people value transit and their priorities to improve the system. The RTA worked with partners at the Service Boards and CMAP and incorporated broader public and stakeholder input to craft an Agenda for Advocacy and Action and a plan to immediately begin implementing the highest priority items.

#### Engagement Activities

- Stakeholder (“Movers” Group) workshop and working group panel discussion
- Two public input surveys, garnering thousands of responses
- Five workshops with Service Board and CMAP staff
- Eight in-person engagement events across the six counties
- More than 50 presentations to partners, stakeholders, and county boards
- Public hearing





The vision, principles, goals, and strategies found in the rest of this document are the direct culmination of this process and the hundreds of hours of engagement that shaped it. The transit system that RTA helps manage belongs to everyone, as do the recommendations in this plan. Transit in itself is a public good and this process was a reflection of that ideal, it was done for, and by the region, and its implementation relies on regionwide partners as well.

The Vision We Created Together

**Our vision is safe, reliable,  
accessible public  
transportation that connects  
people to opportunity,  
advances equity, and  
combats climate change.**



**Three core principles** have guided the process of developing this plan and will be central to implementation — Equity, Committed to Change, Stewardship.

# Equity

The Chicago region is home to more than 8 million residents of all races and ethnicities, but a legacy of racism and segregation, including in our transportation system, has led to inequitable access to opportunity for too many.

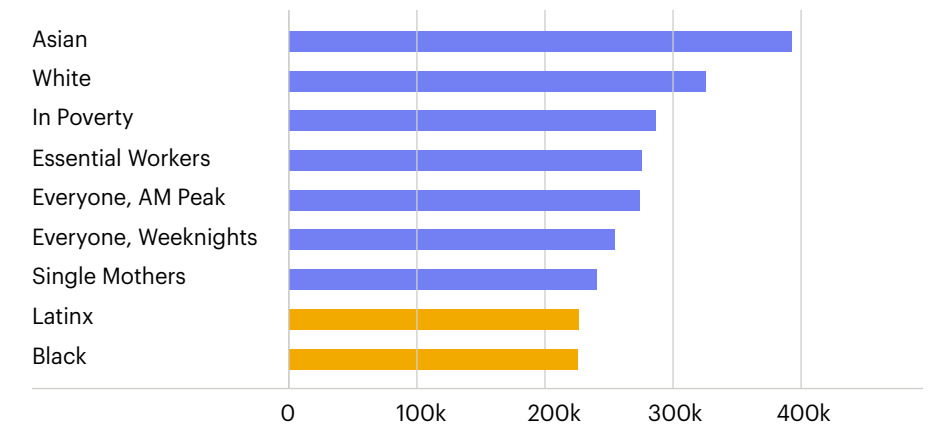
The RTA recognizes the historic harms that have left people and communities of color, those experiencing lower incomes, residents with disabilities and older adults — all groups who rely most on transit — without the transportation network they deserve.

Transit connects people to jobs, education, and healthcare. It provides independence to people with disabilities. It transports people to economic opportunities beyond their community. During the pandemic it was a constantly humming lifeline, continuing to provide essential trips, including those for workers like nurses and warehouse employees to jobs that allowed millions to stay home.

Fulfilling the promise of a more equitable transit system, including increasing access by Black and Latinx workers, for the Chicago region will take deliberate policy decisions made by a coalition of decision-makers, and changes to policies and administrative processes that operationalize those decisions. In addition to the moral imperative to provide equitable transit access, doing so is economically the smart decision. Employers cannot access the full talent pool that could improve their workforce, and as the Chicago region continues to recover from the pandemic, we can't afford to leave anyone behind.

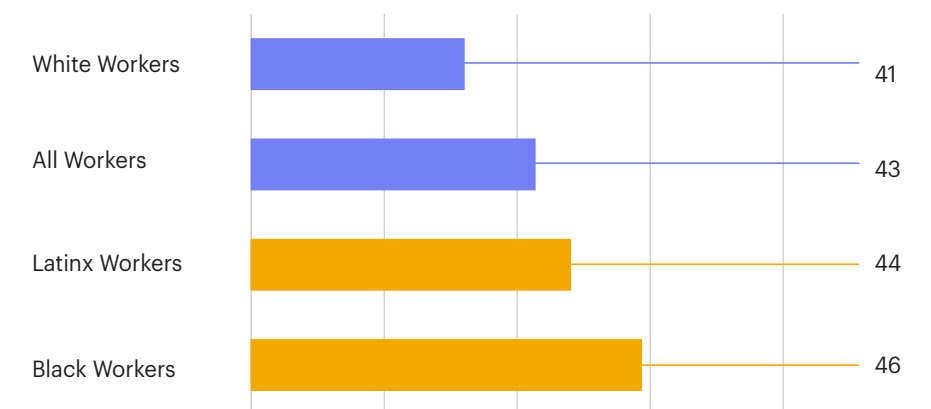
In our region, Black and Latinx residents can access 18% and 17% fewer jobs via transit than the average resident, while White and Asian residents can access 19% and 43% more jobs than the typical resident on average.<sup>9</sup>

Figure 1: Average Number of Jobs Accessible from Home in 45 min by Transit for Different Population Groups in the Chicago Urban Core, TransitCenter Fall 2021



Across the region, Black and Latinx residents who rely on transit to get to work have longer commute times compared to the regional average and White workers.<sup>10</sup>

Figure 2: Average Commute Time via Transit in Minutes By Race, Replica Fall 2021

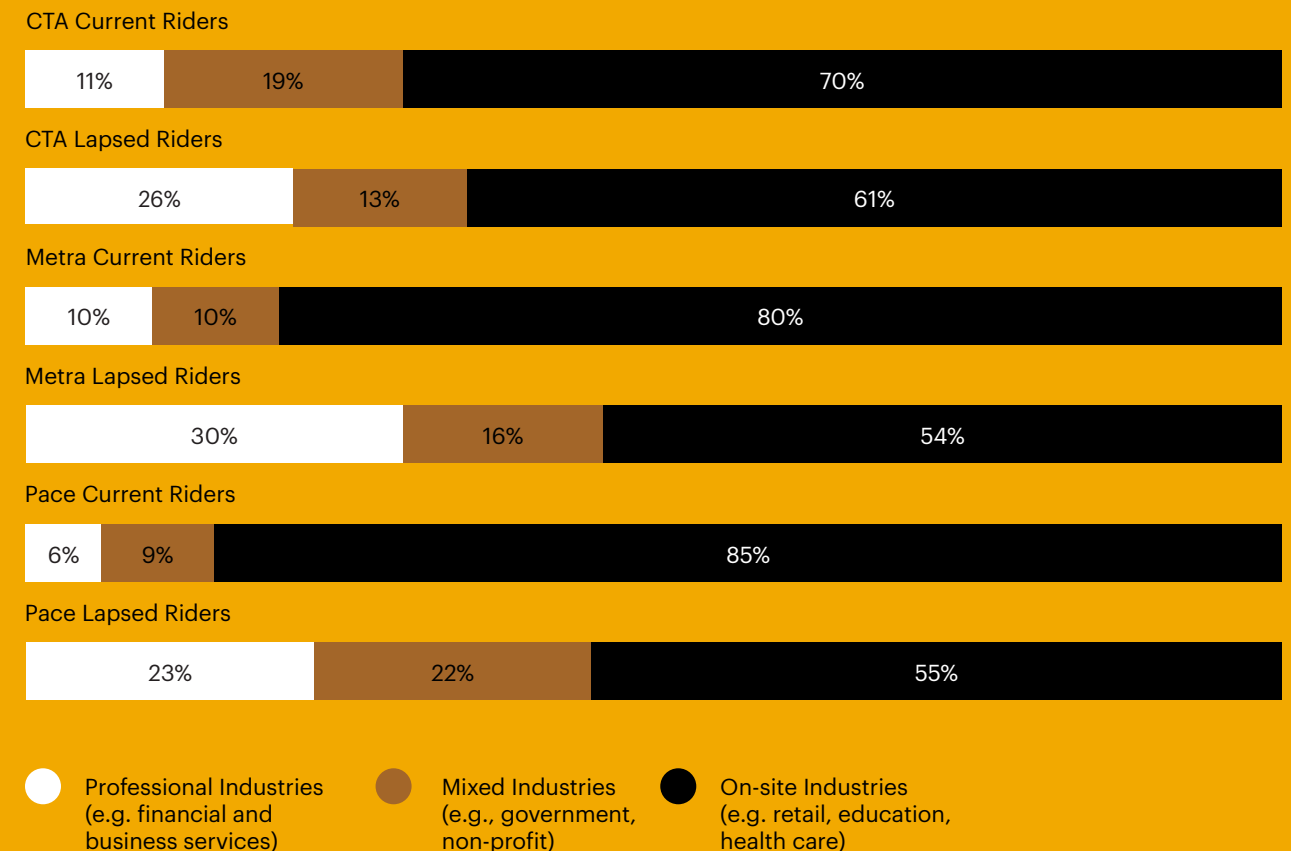


**Transit is an economic equalizer** that connects people to the diversity of opportunities across our region. Transit's critical role connecting people to jobs and services was underscored during the pandemic. Between November 2020 and January 2021 riders across the system were surveyed by RTA.

**Essential workers, people who identify as Black or Latinx, and riders experiencing low incomes were most reliant on transit during COVID.**<sup>7</sup>

**70–85% of all riders surveyed indicated that they worked jobs “on-site” in industries such as retail, education, and healthcare.**<sup>8</sup>

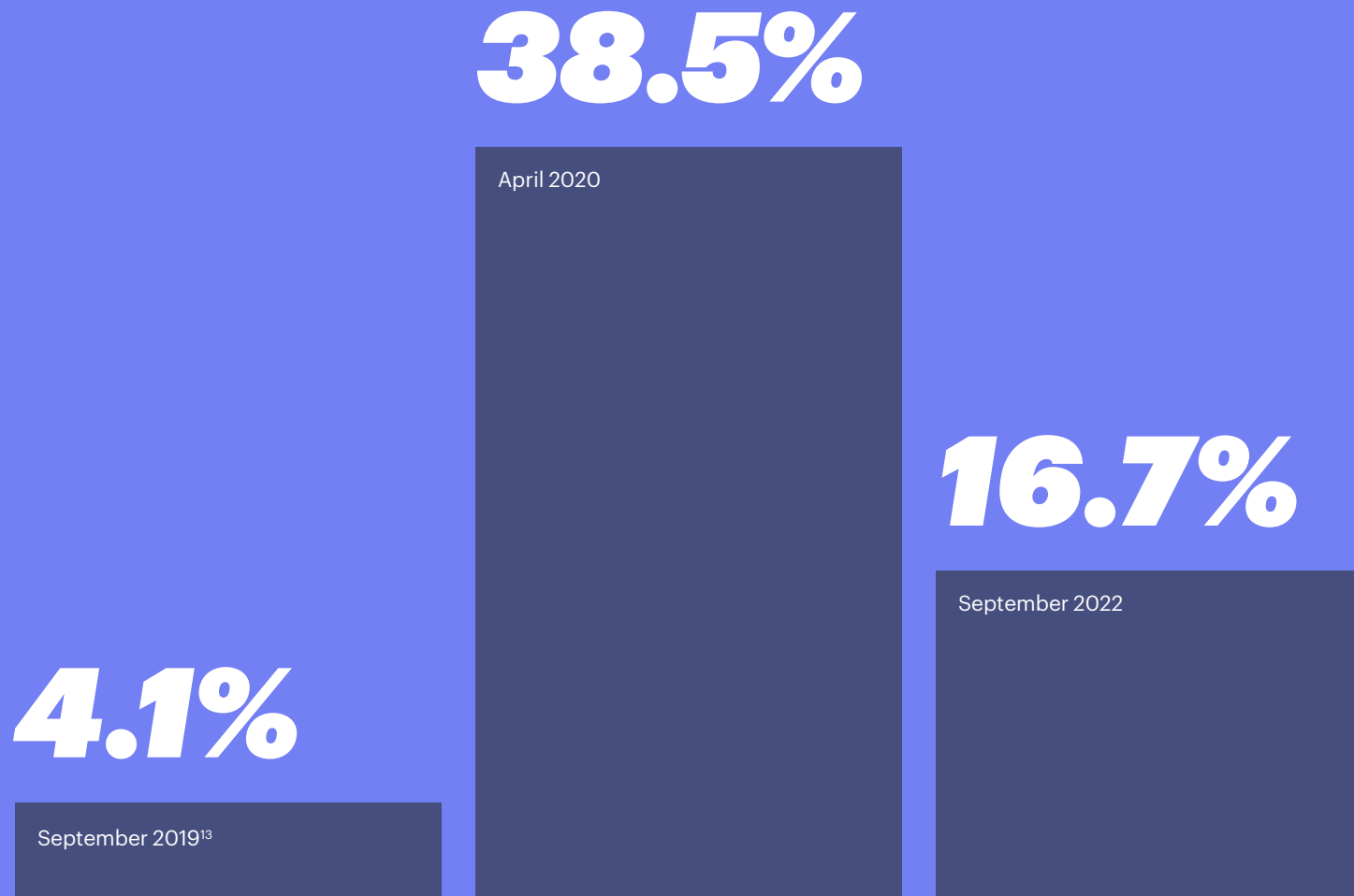
**Figure 3: Responses from RTA Survey Conducted in November 2020 and January 2021 Showing Worker Industry by Service Board and Rider Type**



# CHANGES IN TRAVEL PATTERNS

Travel across the region on all modes of transportation plummeted at the onset of the COVID-19 pandemic, only returning to pre-pandemic levels by the spring of 2021. Travel has been the slowest to return in Cook County, with the number of trips increasing more rapidly in Kane, McHenry, and Will counties.

Residents working from home from 2019–2022



Increase in regional travel from 2019<sup>22</sup>

**+3%**

Increase in the number of weekday trips in Kane, McHenry, and Will counties

**+7%**

# Committed to Change

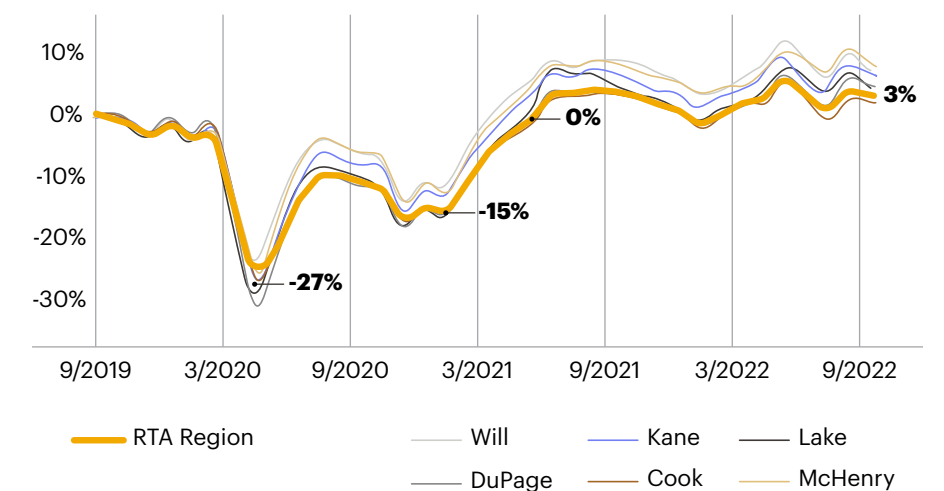
The pandemic shifted the way we live, work, and move; as a result, public transit must adapt.

The RTA acknowledges that it can be challenging for public agencies to change, but the status quo is not an option. The combined effect of changing travel trends, new technologies, and the pandemic, have resulted in more people today working from home or choosing to drive rather than ride transit than five years ago. This makes our roads more crowded, our commutes slower and more expensive, and our air more polluted. It also means that the commuter-focused transit system will need to pivot to serve people in the middle of the weekday, evening, and weekend.

Innovation is required not only to rethink how we fund transit and meet the changing needs of riders, but also to improve how our transit agencies work together and better engage the communities we serve when making decisions about transit investments.

Across more than 1,000 people surveyed from November 2021 to February 2022 “creating a more flexible system that better serves destinations outside of downtown Chicago during hours outside of the traditional AM/PM commutes” ranked at the top of potential changes that need to be made to regional transit.

Figure 4: Percent Change in Regional Trips Taken on an Average Weekday as Compared to September 2019, Replica Fall 2022





Transit also preserves affordability. Across the region, **households allocate 20% of their budget to transportation costs**, and the average cost to own and drive a car is nearly **\$12,000 annually**.<sup>11</sup> By using transit, households can drive less, own fewer cars, and save thousands of dollars each year.

Annual Cost of Owning and Operating a Car

**\$11,820**



Annual Transit Cost — Metra Super Saver Monthly + Regional Connect (Unlimited Pass)

**\$1,560**



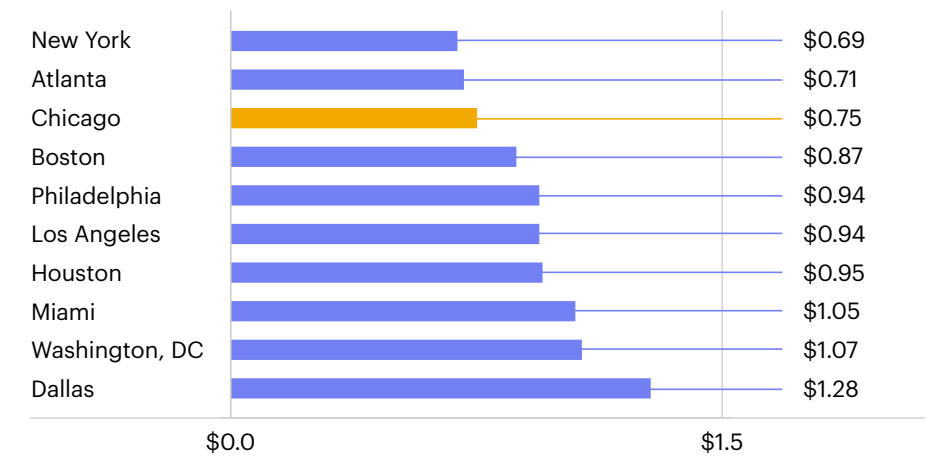
# Stewardship

The RTA recognizes that we are stewards of America’s second-largest transit system, a world-renowned combination of historic infrastructure and modern innovation. This system has allowed the Chicago mega-region to grow into a dynamic global economy equal in size to that of Switzerland and now must adapt in response to urgent questions of social, economic, and environmental change even as financial challenges loom.

The RTA and Service Boards are committed to addressing these financial challenges head-on while also being good financial stewards of the limited dollars available to ensure that this mass transit system, a lifeblood that runs through 274 communities, is viable for the next generation.

Prior to the pandemic, our region was one of the most efficient in delivering transit service. In 2019, the average operating cost per passenger mile traveled was \$0.75, which was lower than that of the majority of peer regions.

Figure 5: Regional Average Operating Cost per Passenger Mile for the Chicago Region and Nine Peer Regions, 2019



Our system is operated in a cost-effective way but keeping costs low is not the best or only way to measure stewardship or overall effectiveness. We as a region must do more to acknowledge and measure transit’s place as a public good in our society. Making investments in our public transit system means making communities more accessible to everyone, providing people with access to a job, education, healthcare, and the necessities of life and reducing the climate impacts of the broader transportation system. Investing our shared resources in transit is how we can all be good stewards of the world around us and create the region we want for ourselves and for our future.

## Regional Riders

### Audrey Wennink

Director of Transportation, Metropolitan Planning Council  
CTA Red, Purple, and Brown line rider

“Transit is what makes large cities like Chicago possible. There’s no way we could have millions of people working and playing in our city center and around the region with only driving. The roads couldn’t carry that many cars. It is what allows large, dynamic regions like ours to exist.”

“Right now, transit is in a really tough place. A lot of people have lost confidence in it and if we are going to be asking for large investments in transit, we need people to feel good about the system. We need to get to a place where people are able to get to the bus or train with ease, rely on it to show up, and feel safe while riding. We need to make transit run at the times people need it so it is a viable alternative people can choose without thinking twice about it or being forced to choose a more expensive and less sustainable way to travel. We need transit to be so great, so predictable, so reliable, and so attractive that everyone wants to use it — because that’s really what’s best for our region.”

“I would also love to see transit be a place that is really fun and joyful, where people from all walks of life come together in a public space. It’s part of what makes our city and region unique, it’s part of the culture of Chicago. When we infuse transit stations with art, beauty, green spaces, and everything is clean and works how people need it, that can be a wonderful, positive part of everyone’s day.”

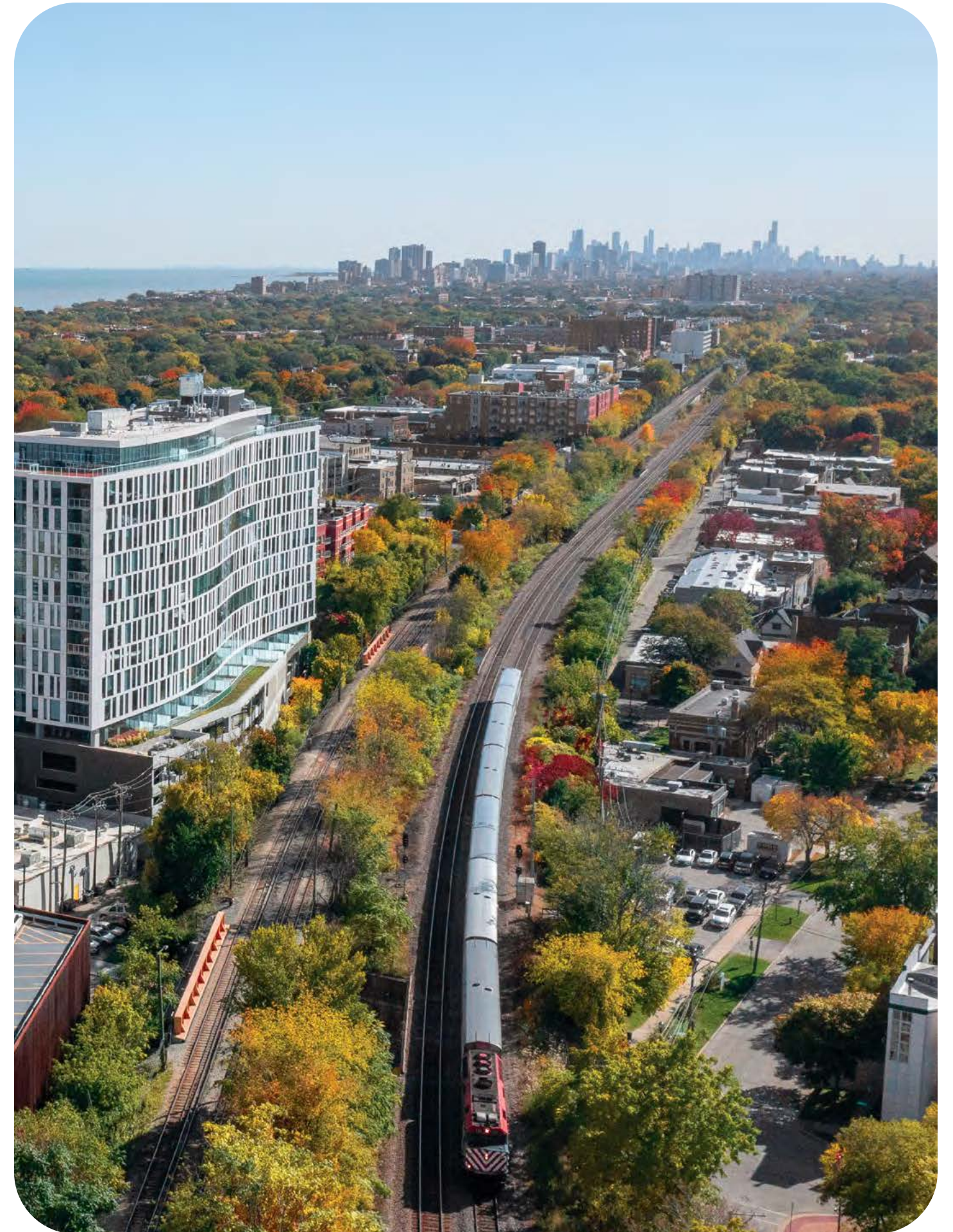
“Today though, we are in a period of multiple intersecting crises, and we need to be innovative, we need to be bold to solve those crises. That includes being creative about solving our transit problems and we need to have courageous leadership who understands how important this is to our region — and just be willing to dig in.”



# A New Future for Transit is Possible with **Stable Funding**

Stakeholders and the public have been clear that transit is a valuable asset that needs to be preserved, improved, and expanded. However, the reality of transit systems nationwide is that they have been undervalued and underinvested as public funds have been channeled to roads, parking, and other infrastructure that supports autos more than transit. That paradigm needs to shift to investing in more efficient, equitable ways of transporting people than driving alone: Transit is the answer.

Invest in Transit highlighted the need for increased capital funding to help the transit system grow and stay competitive in 2018, at a time when transit was relatively stable but threatened by declining condition, competition from transportation network companies, and ongoing roadway congestion. The new capital funding programs from the state and federal governments and activities undertaken since Invest in Transit will allow the RTA and Service Boards to deliver significant capital improvements over the next five years and beyond. That said, the work of improving a one-hundred-plus-year-old system will never end — decades of disinvestment has resulted in a large backlog of projects that still need to be completed. Moreover, the transit system now faces the additional instability of a looming operating funding crisis and new travel demands resulting from the pandemic. Both capital and operating investment must continue at even greater levels far into the future in order to make transit more modern, competitive, and reliable.



## Operating Funding That Comes from Fares is Not Enough, Action Will Be Needed

The Chicago region's transit system is currently funded by a combination of regional sales tax, funding from the state of Illinois, and revenue generated by the system like fares paid by riders. Before the pandemic, sales tax was relatively stable but fare revenue was declining slowly and funding constraints limited the Service Board's ability to test new and innovative models that wouldn't immediately generate ridership and revenue.

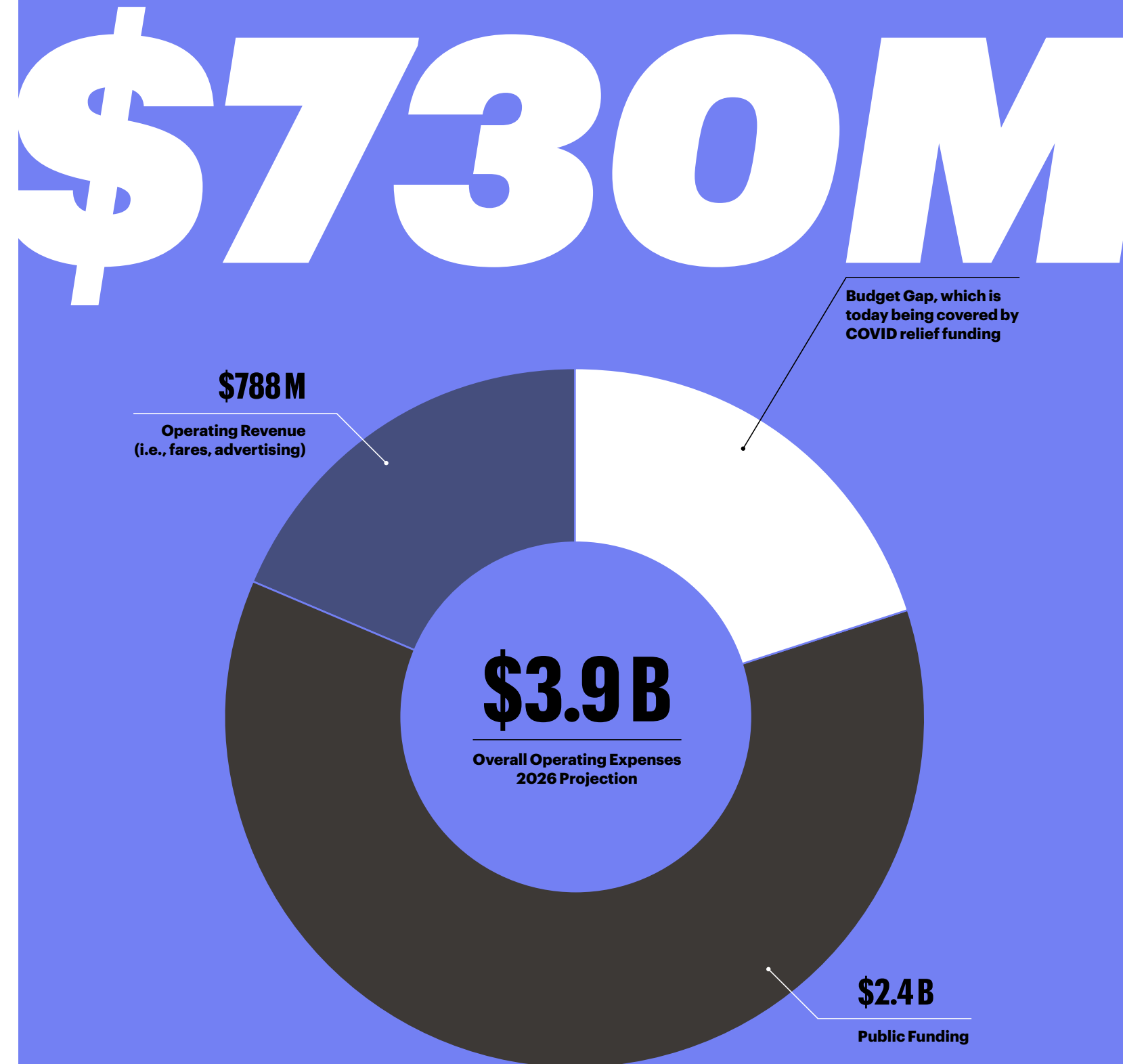
Chicago's transit systems continued to be a lifeline for more than 250,000 daily riders during the worst of the pandemic. While many continued to ride, many other people stopped riding transit or rode less frequently, which meant that fewer fares were collected and the RTA system — like many transit agencies across the country and the world — faced an immediate budget crisis.

The federal government, over two administrations of differing political parties and as lobbied for by transit agencies and advocates from across the country, responded and recognized the need for and importance of continued transit operations relief funding in 2020 and 2021. In total, RTA received an allocation of \$3.5 billion in federal relief funding to help offset fare revenue losses from declining ridership due to the pandemic. This relief funding combined with RTA sales tax and state funding buoyed the transit system through the darkest early months of the pandemic and continues to support it today. However, as described in this section, this federal relief funding is expected to run out in 2025. There is historic precedence for the federal government funding transit operations but not large systems like ours since the 1980s.

Ridership crossed a million daily rides threshold in the fall of 2022. However, this return is not enough for fiscal stability and puts into question the reliance on fares moving forward. Moreover, ridership isn't expected to recover to 2019 levels for the foreseeable future. The public health and safety restrictions in place during the pandemic, the increase in people working from home, and changes in how people travel have all combined to drastically reduce transit ridership since March 2020. While riders are returning to the system, the impacts of the pandemic and permanent changes in remote and hybrid work are projected to result in lower levels of ridership for the remainder of the decade compared to 2019.

Each agency is working tirelessly to bring back riders, however, beginning in 2026, the system could face a \$730 million annual budget gap assuming current service levels are maintained regionwide. At nearly 20% of the annual expense budget, this gap will prohibit any additional improvements to the regional system.

Figure 6: Projected Annual Operating Expenses and Revenues Including Budget Shortfall, 2026



## **Inaction, Service Cuts, and Fare Increases are Not Acceptable — or Sustainable**

If no action is taken, the agencies and their Boards will be faced with difficult choices to cut service, raise fares, or both. Actions to dramatically cut operating costs could include instituting major lay offs, route or line eliminations, service cuts, station closures, cancellation of capital improvement projects, and other drastic measures that will further damage our transit system and cause massive disruptions to the region's economy, workforce, and communities.

It is impossible for RTA and the Service Boards to solve the funding crisis by raising fares alone, as fare increases of the magnitude needed to fill the budget gap — nearly doubling from what they are today — would drive down ridership and negate additional revenue brought in by higher fares. Even if ridership were assumed to be unaffected by fare increases (an assumption which is not supported by empirical evidence from studies on rider behavior), such large fare increases would be truly unprecedented and render the system unaffordable for many riders, particularly the most vulnerable users who have few other options and would be in direct conflict with the Equity principle this plan outlines.

**Drastic fare increases would also cause people to find other travel options and drive down ridership even further, necessitating more fare increases or additional reductions in service, further decreasing ridership and eroding transit across the region to a point where the system would no longer be recognizable to an area resident today.**

For example, a rider paying the full fare of \$2.50 today to ride the 'L' each way would pay \$10.00 for a round trip, a Metra rider purchasing A-E tickets for \$6.25 today would pay \$25 for a round trip, and a Pace rider paying \$2.00 today for a one-way bus trip would pay \$8.00 for a round trip — and all of this for the same system that exists today with no major improvements or expansions. Doubling of fares is simply unrealistic, as it would make the system one of the most expensive in the country, make transit less competitive with other modes, and cause dire consequences.

During the RTA's strategic plan process, RTA asked people how the region should respond to a potential future budget deficit — by scaling back service or pursuing additional funding for transit. Survey respondents overwhelmingly indicated that RTA should pursue additional funding to maintain our robust transit system (87%) rather than cutting service (13%). These same sentiments were echoed in the hundreds of conversations we had with residents across the region and the dozens of stakeholder workshops we organized. These conversations and in-depth discussions underscored the fact that people want to maintain the system and see increased investment to make transit safer, more reliable, and accessible to everyone.

**While some degree of fare increases and cost-controls will likely be needed in the future, these actions alone to the scale that would be needed to fill the impending budget gap would be counterproductive.**

Instead, the RTA and partners should take definitive steps forward to fill the funding gap in today's structure with an increase in public investment to ensure that stewardship of this world-class transit system can continue far into the future.

### **The Agencies are Working Toward Multi-Pronged Solutions**

Knowing that a future funding crisis is looming, RTA and the Service Boards are working hard to avert these financial challenges and evolve toward a more sustainable funding structure. A Technical Working Group composed of staff from the RTA, Service Boards, and CMAP was dedicated to this subject during the plan development process. The group identified and evaluated 27 federal, state, and local revenue policies to support the Chicago regional transit system. Each revenue policy was evaluated and scored based on several criteria, including annual revenue estimates, impacts of the funding source on historically disadvantaged groups, and the resources needed to establish the revenue source and collect revenue as shown in Table 1.

The eleven highest-scoring funding options and estimated potential yields are shown in Figure 7 and described below:

- **Increase RTA Sales Tax** This option involves an increase of 0.25 percentage points in the existing RTA sales tax levied on Cook County and Collar Counties in the RTA service area.
- **Increase State Motor Fuel Tax** This option involves an increase of \$0.05 per gallon in the Illinois Motor Fuel Tax (MFT) levied on the sale of gasoline or diesel, with revenues dedicated to transit operations.
- **Implement Congestion Pricing** This option involves a congestion pricing mechanism to levy a geographic- and/or temporal toll or fee on travel on Chicago-area highways into the city with revenues dedicated to transit operations.
- **Expand RTA Sales Tax on Services** This option involves an expansion in the existing RTA sales tax to cover services, most of which are currently exempt from taxation.
- **Implement VMT Tax** This option involves a VMT tax, a tax on the number of miles driven in a vehicle, to replace 5% of state MFT taxes lost by fuel efficiency and EV adoption and dedicate revenues to transit operations.
- **Expand RETT** This option would extend the Real Estate Transfer Tax from real estate transactions in the City of Chicago to the entire RTA service area, with revenues dedicated to all Service Boards.
- **Increase Tollway Tolls** This option involves a 5% increase in tolls on the Illinois State Toll Highway Authority (Illinois Tollway), with revenues dedicated to transit operations.
- **Increase State PTF match** A 5% increase in the amount transferred from the Illinois General Revenue Fund to the Illinois Public Transportation Fund (PTF) as part of a state match for revenues generated regionally.
- **Increase Vehicle Registration Fee** This option involves an increase to the vehicle registration fee for vehicles registered in the RTA service area by 10% and dedicating the revenues to the RTA for transit operations.
- **Increase Reduced Fare Reimbursement** This option calls for an increase in state reimbursement to RTA and Service Boards to offset revenue losses from free and reduced fares provided to the elderly, people with disabilities, and students.
- **End State Surcharge** This option involves the elimination of the 1.5% surcharge on RTA sales tax receipts retained by the Illinois Department of Revenue.

Table 1: Criteria Used by 10-Year Financial Plan Working Group to Evaluate Potential Revenue Options

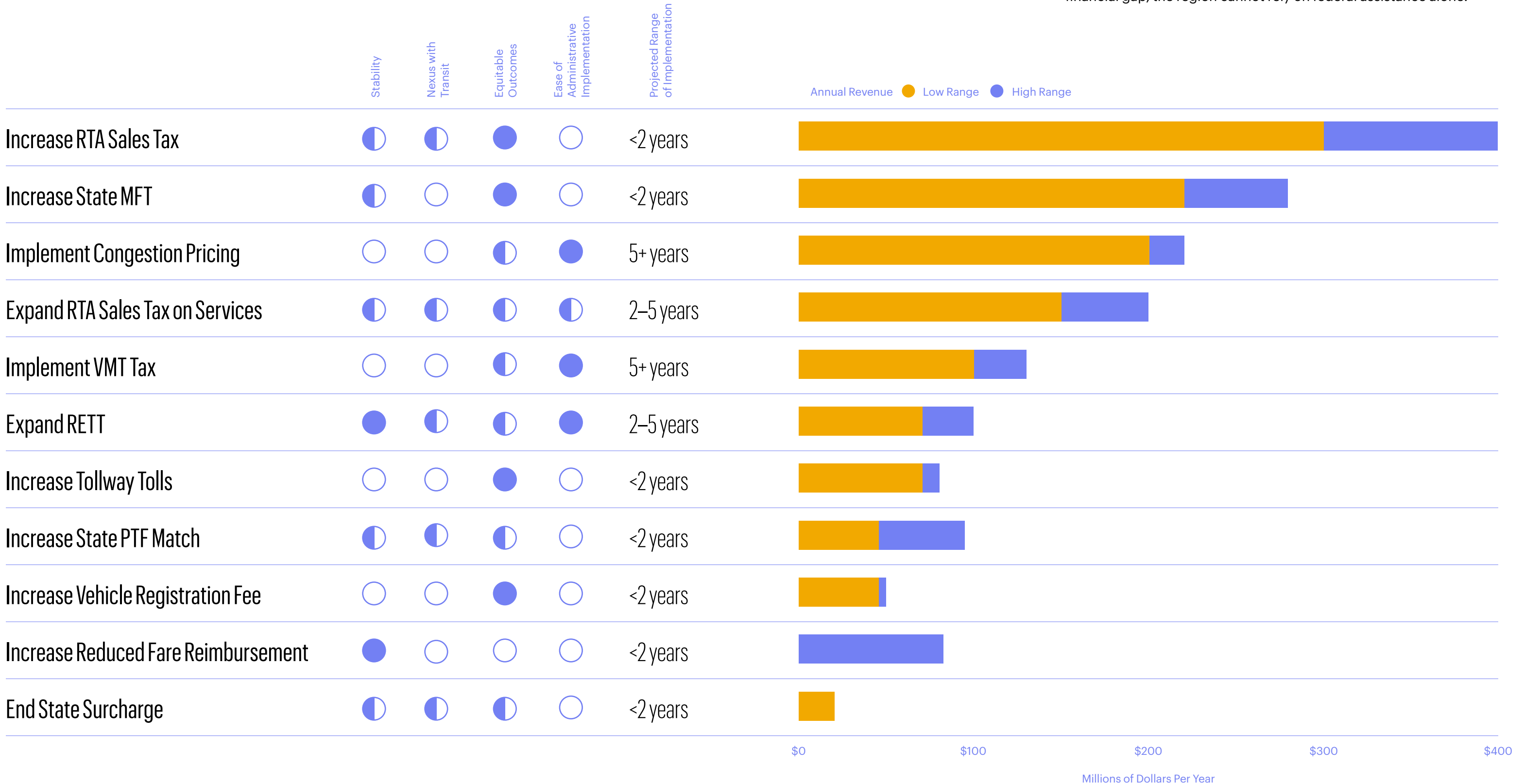
<b>Stability</b>	The extent to which the funding source may be expected to change in volume (excepting inflation) from year to year	<ul style="list-style-type: none"> <li><input type="radio"/> Fluctuation is low or nonexistent and volumes are highly predictable and factors affecting stability are understood</li> <li><input checked="" type="radio"/> Fluctuation is moderate and relatively predictable</li> <li><input checked="" type="radio"/> Fluctuation is significant and unpredictable, and factors affecting stability are not identified</li> </ul>
<b>Nexus with Transit</b>	The extent to which the revenue source has been utilized to support regional public transit previously aligns with or supports the purpose of regional public transit as a public good	<ul style="list-style-type: none"> <li><input type="radio"/> The source creates and/or strengthens incentives to use public transit</li> <li><input checked="" type="radio"/> The source has historically supported public transit</li> <li><input checked="" type="radio"/> The source has little alignment with public transit</li> </ul>
<b>Equitable Outcomes</b>	The degree to which costs associated with the funding source reduce the share of impacts on historically disadvantaged groups, particularly low-income households and including communities of color, people who possess limited English proficiency, have a disability, and/or are senior citizens	<ul style="list-style-type: none"> <li><input type="radio"/> The source is progressive, with a lower share of revenue collection from historically disadvantaged groups</li> <li><input checked="" type="radio"/> The source falls on all income levels and socioeconomic groups, irrespective of the consequences</li> <li><input checked="" type="radio"/> The source is regressive, reinforcing the status quo which predominantly affects historically disadvantaged groups</li> </ul>
<b>Ease of Administrative Implementation</b>	The amount of resources needed to establish and maintain the revenue source and collect revenue	<ul style="list-style-type: none"> <li><input type="radio"/> The revenue source is already in place and requires no additional resources for administration</li> <li><input checked="" type="radio"/> The revenue source is not yet in place but is structurally similar to existing revenue sources and can be collected using existing procedures</li> <li><input checked="" type="radio"/> The revenue source represents a new mechanism for revenue collection and new procedures must be established</li> </ul>

Low
  Medium
  High

Figure 7: Annual Revenue Yield Ranges and Criteria Scores for Top 11 Revenue Options Evaluated by 10-Year Financial Plan Working Group

# TOP 11 REVENUE OPTIONS

The findings of the analysis demonstrate that no single funding proposal would be able to generate sufficient revenue to avert the projected fiscal cliff of \$730 million in 2026 for the existing transit system let alone fund major improvements or expansions to the system that the public wants to see. The region will need to pursue several additional state and local funding mechanisms to close the financial gap and support future improvements. While dedicated federal assistance for transit operations would aid in closing the financial gap, the region cannot rely on federal assistance alone.





### **Fare Recovery Ratio**

CTA, Metra, and Pace are required by law to generate enough revenue to cover 50% of the regional transit system's day-to-day operating budget each year (known as the system-generated revenue recovery ratio requirement). Pace's ADA Paratransit is also required to cover 10% of its operational costs through direct revenue. The Service Boards primarily generate revenue from rider fares, along with ancillary revenue such as advertising income and the lease of space.

These laws were enacted decades ago, with the thinking that it would ensure that transit riders pay a "fair share" of the cost of their trip. As of 2022, the RTA's recovery ratio requirement is unique among most U.S. transit agencies and the impacts of the COVID-19 pandemic on ridership have further demonstrated how unrealistic and overly burdensome the recovery ratio is.

In December 2021, the Illinois General Assembly granted the Service Boards temporary relief from the recovery ratio requirement through the end of 2023. The RTA believes that a permanent change to the current statutory recovery ratio requirements is warranted and will enable more equitable delivery of transit service across the region. The RTA and Service Boards would still be required to maintain a balanced budget but updating the recovery ratio requirement would codify what the pandemic has dramatically illustrated and has been echoed by residents we've engaged with across the region — transit is an essential public service that should be provided not to generate revenue, but as a way to advance our region's economic viability and future success.

### **Chicago Region's Fare Recovery Requirement Unique Among U.S. Peers**

An informal review of transit systems nationwide revealed few recovery ratio policies similar to the RTA's requirements and none that aimed for as high a share of system-generated revenue. The two systems with formal state requirements most akin to the RTA's, the Maryland Transit Administration and Denver's Regional Transportation District, had their 35% recovery ratio requirements repealed in 2017 and 2021, respectively. New York and California require specific revenue targets to apply for state transit funding; however, these are significantly more lenient than the RTA requirements.



## Regional Riders

### Kate Lowe

Assistant Professor UIC

CTA route #8 and Blue line rider

“Public transit is an essential good, both for the practical reasons of environment, equity, and the economy. And, because everyone has a right to mobility.”

“Chicago is an outlier. It has a really odd requirement in terms of the farebox recovery ratio, a mandate of about 50% of operations have to be funded by riders. That means that instead of asking ‘Is this the most important service?’ There’s an incentive to chase fares.”

“A public good should be evaluated on what it’s delivering, not on revenue, like the farebox. It’s really exciting and important to plan for transit as a public good, rather than using money as the driving decision making factor. That’s challenging though, because as much as we collectively don’t want to be chasing fares, we also have to find funds to support this essential service.”



# We Refuse to Let Transit Collapse On Our Watch

Our region is faced with a choice. We can choose to come together and find new, sustainable ways to fund transit and invest in our region's future. Or we could face an alternate future where we fail to act — isolating many of our most vulnerable residents, jeopardizing our economy, putting our environment in peril, and worsening the inequities across our region. Failing to invest in the transit system, including in operating funding, will set back the regional economy, exacerbate labor shortages, worsen education and health outcomes, and leave our region ill-equipped to face the converging crises of climate change and inequality.

The negative impacts of a significant reduction to transit service would do the most harm to those least able to absorb additional burdens and have cascading, cross-sectoral ramifications across the region. As part of this strategic plan project, RTA contracted with Sam Schwartz Consulting and Cambridge Systematics to conduct a new economic evaluation of RTA's transit system and its impact on the Chicago region. Using relevant data such as transit ridership, passenger miles of travel and travel times, vehicle revenue miles, vehicle revenue hours, average transit fares by transit mode, as well as information from a literature review, RTA's consultants estimated the overall value of the transit service in the Chicago region provided by CTA, Metra, Pace, and Pace's paratransit services in 2022 from several perspectives.

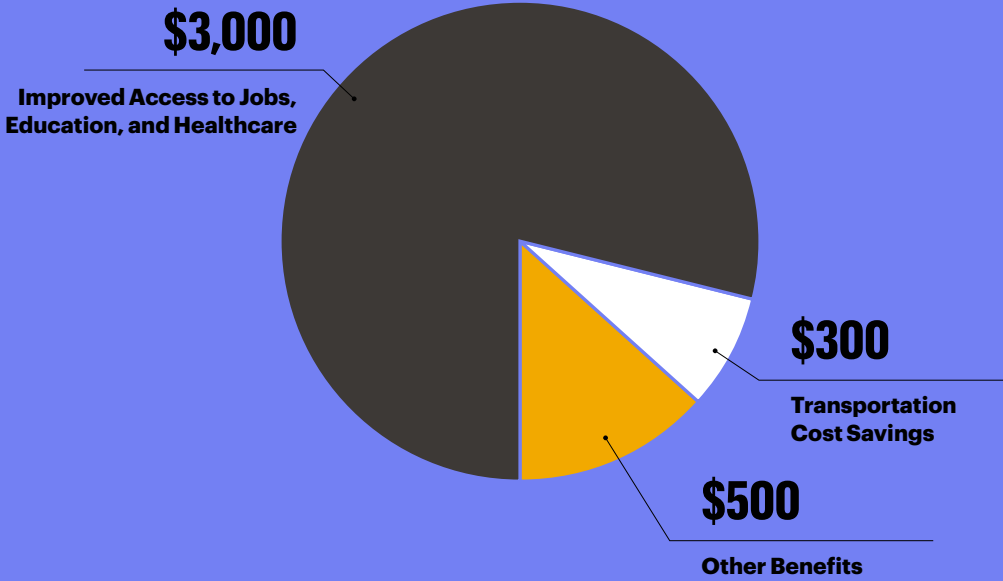
The consultant analysis estimated that, in total, the RTA's regional transit system is estimated to deliver \$17.2 billion in regional benefits in 2022, accounting for the agencies' direct spending; economic impacts; and transportation, safety, and environmental benefits.



# HOUSEHOLD IMPACTS

Annual Benefits Per Household By Promoting Mobility and Reducing Travel Costs

# \$3,800/year





# ECONOMIC IMPACTS

Jobs Supported Overall by RTA and Service Boards

# 126,000 Jobs

Regional Economic Activity Created by Transit

# \$5.6 Billion

Additional Tax Revenue Created by Transit

# \$1 Billion

Cost vs Benefit

# \$1 → \$3.86

For every \$1 we invest in transit, the region and our communities receive \$3.86 in overall benefits.

Transit directly employs thousands of people but also spurs additional job growth throughout the economy. Transit access is also a key differentiator for our region and is a major factor in companies and talent choosing to locate here. Google's decision to purchase the Thompson Center in Chicago's Loop offers just the latest piece in a long line of evidence. "The Thompson Center will provide employees with unparalleled public transit access as the only building in the city where six L train lines converge, easily connecting Chicago's South, West and North sides" wrote Google's Karen Sauder in June 2022.<sup>14</sup>



Our regional transit system provides a diverse range of societal benefits that underscore its critical role for our communities, environment, and economy. By providing people access to jobs, education, and services transit connects people to opportunities, enabling them to learn and develop new skills, earn income, and support their families.



# SOCIETAL IMPACTS

**Additional Total Driving Without Transit**

**1.7 Billion Miles**

**Additional Greenhouse Gas Emissions Caused By Driving<sup>15</sup>**

**375,000 Tons**

**Regional Savings on Additional Public Assistance Program Spending**

**\$1 Billion**

**Estimated Number of Increased Severe Traffic Crashes Without Transit**

**1,500/year**



# CLIMATE IMPACTS

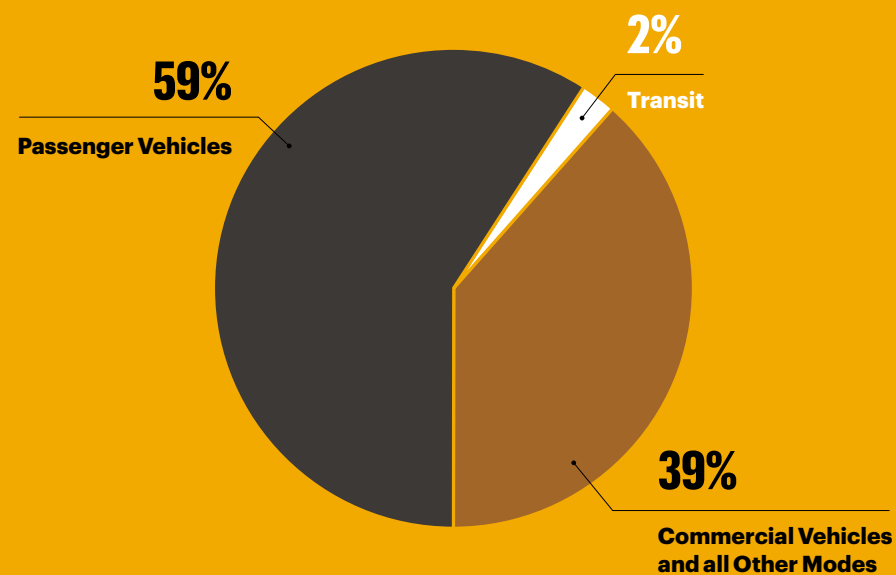
Transportation's percentage of overall regional greenhouse gas emissions, 2019

# 32%

Change in transportation emissions, 2010-2019

# 2%

Transportation's greenhouse gas emissions by mode, 2019



Transit's reduction of greenhouse gas emissions in metric tons of carbon, 2018

# 3.7 Million

Our regional transit system is one of, if not the strongest tool our region has in the fight against climate change.

Transportation overall accounts for 32% of our region's total emissions. Emissions from transportation increased by 2% over the previous decade while emissions from waste and stationary energy, which includes fossil fuels used in non-transportation applications such as industrial heat and electricity production, fell by 38% and 11% respectively. The increase in transportation emissions is a result of the increasing number of miles being driven throughout the region, which grew at more than double the rate of regional population growth from 2010 to 2019.

Across the six-county RTA region, public transit accounted for less than 2% of all greenhouse gas emissions from transportation in 2019, while passenger vehicles were responsible for 59% of overall transportation greenhouse gas emissions.<sup>16</sup>

Transit produces less than half the greenhouse gas emissions that driving does per passenger mile. In 2018, the regional transit system saved the region an estimated 3.7 million metric tons of greenhouse gas emissions (including the benefits of more sustainable land use patterns enabled by transit), the equivalent of taking one of Illinois' remaining coal-fired power plants offline.<sup>17,18</sup> In a world where our regional transit system, and transit-oriented development around it, did not exist, it is estimated that we would drive 18 billion more miles annually, 33% more than we do today.

Failing to address the system's forthcoming funding issues is a choice we cannot afford to make. In addition to being essential to so many millions of riders, our regional transit system has the power to address our economic, environmental, and social challenges at a scale nothing else can. It's worth preserving and improving for whatever is coming next, and this document lays out a practical vision and agenda for doing so.



## Capital Funding is Stable and Paying Dividends

The Chicago region boasts one of the largest transit systems in the nation with approximately 1,500 miles of track, 7,500 vehicles, 400 stations, and 70 maintenance facilities representing an irreplaceable investment built over generations. This infrastructure provides over a million transit trips each day and has for decades. The system's stations, tracks, and garages need to be maintained and rebuilt to stay competitive and reliable for today's travelers and to run cleaner and produce fewer emissions.

The region's portfolio of **transit infrastructure needs an annual investment of \$3.5 billion over the next 10 years** to address chronic disinvestment, to achieve a "state of good repair," to make improvements to the sustainability of transit, and to improve accessibility, reliability, and equity.

Passenger waiting areas and vehicles need to be modernized to meet current standards for accessibility, safety, convenience, and comfort. New vehicles with advanced technology, better safety features and lower emissions are needed to make the ride safer, cleaner and comfortable. New and upgraded maintenance facilities, control centers, and training facilities are needed to empower the skilled transit professionals to run an efficient, 21st century transit system. Moreover, reconstruction projects and vehicle purchases have additional benefits — not only do they improve the transit system — but they support and invest in maintaining an experienced construction and manufacturing workforce both locally and across the U.S.

Transit infrastructure is an investment for the future, and recent developments have shown it's worth it. The region's previous strategic plan, Invest in Transit, emphasized the importance of infrastructure investment for the three transit Service Boards. The plan outlined the region's transit capital needs and the region's first-ever list of transit Priority Projects that the Service Boards committed to advancing with more funding. Such unity among transit agencies and transit advocates across our region was a significant tool in advocating for the enactment of Rebuild Illinois in June 2019 and the Infrastructure Investment and Jobs Act (IIJA) in November 2021.

## Rebuild Illinois Funds End Drought in State Capital Funding — For Now

Prior to the passage of Rebuild Illinois, the RTA system capital program was crawling along for several years without state funding, kept alive by federal programs, Service Board and RTA bonds. Rebuild Illinois, the largest capital program in state history, ended the state capital funding drought and provided much-needed funds to the RTA system with \$2.6 billion over five years in state bond funding and an estimated \$227 million annually in gas tax revenue, referred to as “PAYGO” dollars. The new funding nearly doubled the size of our region’s previous five-year transit capital program and has been programmed to advance a number of key capital initiatives and priority projects previously established by the RTA and Service Boards.

**Although the funding infusion is helpful, it is not enough to address the long-term project backlog; moreover, the source of PAYGO funds is the Motor Fuel Tax, which could see reductions as electric vehicles become more prevalent in Illinois. As a result, RTA and the Service Boards will continue to be proactive with the State to ensure that capital funding is sustained and increased in the coming years.**

Meanwhile, a few examples of projects advancing as a result of Rebuild Illinois bonds include:

- CTA’s rehab of the 5000-series rail cars and the first phase of the Blue Line Congress Branch rehabilitation.
- Metra’s purchase of a fleet of new rail cars, which are now in the design phase and expected in 2025. Additionally, multiple station rehabs along the Metra Electric line are also currently being designed.
- Pace has completed a new garage in Plainfield to service the I-55 express bus service and built a new station at the Joliet Gateway Center.

PAYGO projects are primarily focused on addressing state of good repair and other maintenance needs of the regional transit network. Between 2020 and 2022, \$681 million has been granted to the Service Boards, with another \$1.135 billion expected over the next 5 years. Some of the PAYGO projects that have advanced to date include:

- CTA has used \$325 million to focus on repair and maintenance projects for buses, rail cars, elevated track and structure, and facilities. This includes the CTA refresh and renew program that makes station upgrades system-wide, as well as CTA’s ongoing programs to extend the life of rail cars and buses. In addition, \$31 million is being used to fund new buses to replace vehicles that are past their useful life.
- Metra has advanced important state of good repair projects including locomotive and rail car rehabs, yard improvements, platform and shelter improvements, and the purchase of non-revenue right of way equipment totaling more than \$110 million. Some key station projects include 147th St. Sibley, 79th Street — Chatham and 103rd St. — Rosemoor. Metra is in the process of purchasing new non-revenue vehicles including locomotive cranes, track excavators, undercutters, and track stabilizers to replace vehicles that are beyond their useful lives.
- Pace, to date, has focused PAYGO projects on improving rider amenities with an investment of \$6 million. This includes improvements at bus stops, including shelters and benches, as well as deployment of real time bus tracker signage. Overall, Pace has programmed over \$34 million which additionally includes electric charging infrastructure, farebox replacement and construction of the new South Campus garage.





Capital investments to improve transit systems — such as the purchase of new vehicles, construction of new tracks and busways, and construction of new or upgraded stations — create good paying jobs and spur economic growth. **The American Public Transit Association (APTA) estimates that for every \$1 billion invested in capital improvements for transit, an average of 12,600 jobs are created — many in construction and manufacturing.**<sup>19</sup>



## Federal Infrastructure Law is Keeping the Construction Projects Flowing

The federal government has also taken significant steps to better fund transit since Invest in Transit. The IIJA signed into law in November 2021 represents the largest federal investment in public transportation in U.S. history, with Illinois slated to receive at least \$4 billion in federal funds for public transit over the next five years, the majority of which is distributed by mandated formulas to state and local transportation departments and transit agencies.

The U.S. Department of Transportation (USDOT) has been clear that equity, climate, and community engagement are priorities that will shape federal policies and funding awards. This commitment by the USDOT, the policies in this strategic plan, combined with continued collaboration among regional entities puts the regional transit projects in strong position to compete for dollars and allow the Service Boards to make lasting improvements to the transit system that will be valued for generations. In alignment with these priorities, RTA is working with the Service Boards to program these funds on a range of projects including station upgrades, bus electrification, and accessibility improvements.

Approximately \$200 billion in discretionary funding is available from IIJA. These funds are distributed on a competitive basis by USDOT through new and existing programs and are an important supplement to federal formula funds towards meeting the unmet infrastructure needs of the region. To maximize the award of these competitive funds, continued coordination among the region's transit agencies is valuable. Examples of recent projects benefiting from federal discretionary funds include:

- In 2022 Pace was awarded a \$20 million Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant for the Harvey Intermodal Transportation Center project, providing enhancements to the Pace Harvey Transportation Center that will support new Pulse service and enable electric bus vehicles, and improve pedestrian access. The Pace Harvey Transportation Center sees more Pace bus boardings than any other location in the six-county region and serves one of Illinois' most historically disadvantaged communities. The project is a collaborative effort between Metra and Pace that will provide needed improvements to the Harvey Metra Electric station. When the project is complete, riders will no longer have to cross four lanes of traffic to transfer from the train to the bus.

- Core Capacity funding of \$165 million for the CTA Red and Purple Modernization Program (RPM), was received sooner than expected due to the Federal Transit Administration (FTA) Expedited Project Delivery Pilot Program, which was included in IIJA. The RPM project, includes reconstruction of four stations to make them fully accessible and a grade-separated flyover that the CTA estimates will increase capacity in the corridor by 15%, eliminating one of the biggest chokepoints in the system and improving reliability across lines. These expedited funds are allowing CTA to accelerate the completion timeline, bringing improved accessibility, modern amenities, and increased service to the busiest corridor in our system and one of the most densely populated urban areas of the country.
- State and federal investment will make it possible to modernize the existing system and build new expansion projects like CTA's Red Line Extension and Pace's Pulse Arterial Rapid Transit network. Investments in track and grade separations will allow Metra to move toward a Regional Rail model, providing service at more frequent intervals throughout the day. Following through on these equity, sustainability, and resiliency priorities while also pursuing new funding to deliver on emerging capital priorities is a large part of the work of the RTA and Service Boards.



## Regional Riders

### **Rochelle Jackson**

Transportation Advocate, North Lawndale

Community Coordinating Council

CTA route #157 rider

“I was born and raised in the North Lawndale neighborhood of Chicago. It’s a historic neighborhood on the West Side of Chicago that is predominantly African American. I got interested in transportation in the 1980s when there was talk of budget cuts and the first place those cuts came were in my neighborhood. We lost a few bus routes, a few bus routes changed, a few more were cut, and it put us at a disadvantage, it stifled our community from getting back and forth to work.”

“My biggest success has been advocating for the #157 Ogden Bus, but it’s back now. For 12 years we were cut off and had to go in opposite directions to get where we needed to go. It took a lot of boots on the ground, talking to the transit agencies, the aldermen, the residents to get them to fight with us and just advocating until we got people to listen. The more we talked about it the more we realized we need that bus. It gets people in our community to the Medical District, to work, to schools — it was truly worth fighting for.”

“It’s important for people to not be stuck in their community because there’s no transit. Imagine if you had to walk a mile or more just to get to a bus or train to get to work. Especially because it is not like that all over the city. Transportation should be accessible to everyone, and it should be equal. It’s a disservice for communities like ours to get cut off and you are left thinking ‘Why does this neighborhood have better transportation than we do?’”

“I also think a lot about affordability and how to make sure people can afford transportation. There are a lot of people who are low income who are working, maybe working a minimum wage, and it’s very hard to afford transportation along with living expenses and raising children. What do you pick? Going back and forth to work or feeding your kids? Make it more affordable for everyone, make it accessible, make it safe, make it clean.”

“I understand we can’t fix it all in a few days or even a year, it is a work in progress, but I’ll keep working on it.”

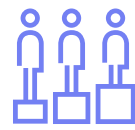


**Table 2: Regional 5-Year Capital Improvement Program Project Evaluation Themes and Metrics Developed by Priority Project Working Group**



**Access to key destinations**

The degree to which a project improves regional access to the region's key destinations. Including jobs, retail, healthcare, recreation, and education.



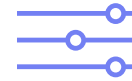
**Equity based on residential geography**

The distribution of project benefits to location(s) identified under the USDOT Justice40 Program.<sup>20</sup>



**Benefits to riders**

The project's minor or major benefits to riders and what proportion of the agency's riders will benefit from it.



**Capacity benefit and need**

The project impact on overall capacity, reflecting current and planned levels of utilization.



**Economic impact**

Project impacts on land use and development, construction, and long-term jobs.



**Service speed and reliability**

Project impact on maintenance or improvement of service speed and reliability, considering both direct and indirect impacts.



**Regulatory impact**

If required, whether or not the project complies with federal, state, local, or other regulatory mandates.



**Operating costs**

The project impact on operating costs.



**Accessibility for people with disabilities**

The project improvements to existing assets to make them partially or fully accessible. Including station/stop and area improvements, vehicle accessibility, and accessible communications.



**Safety and security**

The project impact to maintenance or improvement of exposure to risk for riders/employees and the project impact to security enhancement.



**Climate impact**

Ridership/mode shift impacts — the project impact to climate benefits, such as a reduction in emissions, generated from mode shift to transit and away from private auto-use.

Agency operating impacts — the project impact on reductions or offsets to greenhouse gas (GHG) emissions generated from transit operations.



**State of good repair**

Asset condition — the project impact to ratings from the FTA Transit Economic Requirements Model (TERM).

Vehicle useful life — the project impact to average vehicle ages, compared with Service Board benchmarks to prioritize replacing vehicles that are beyond their useful life.

**Administrative Improvements at the RTA and Service Boards are Improving Transparency and Speeding Up Project Delivery**

The region's transit agencies have been continuously streamlining administrative processes and ramping up construction pipelines to deliver on large-scale investment. Several improvements have been made to the efficiency, effectiveness, and transparency of capital program process since Invest in Transit. These have included:

- Acting quickly to secure grants from funding opportunities to ensure that no funding commitment goes unutilized.
- Working with local, state, and federal agencies to align funding availability to build and maintain priority projects with the unique funding resources available.
- Implementing a new performance-based allocation method for federal formula and state PAYGO funds that incentivizes timely expenditure of funds while also prioritizing accessibility and equity.
- Developing an analysis of capital projects using the transparent goals and core requirements identified in Invest in Transit to help decision makers and the public understand how funds are being spent to achieve regional priorities.
- Publishing datasets and maps related to all capital projects to empower public and stakeholder engagement with the regional capital program.

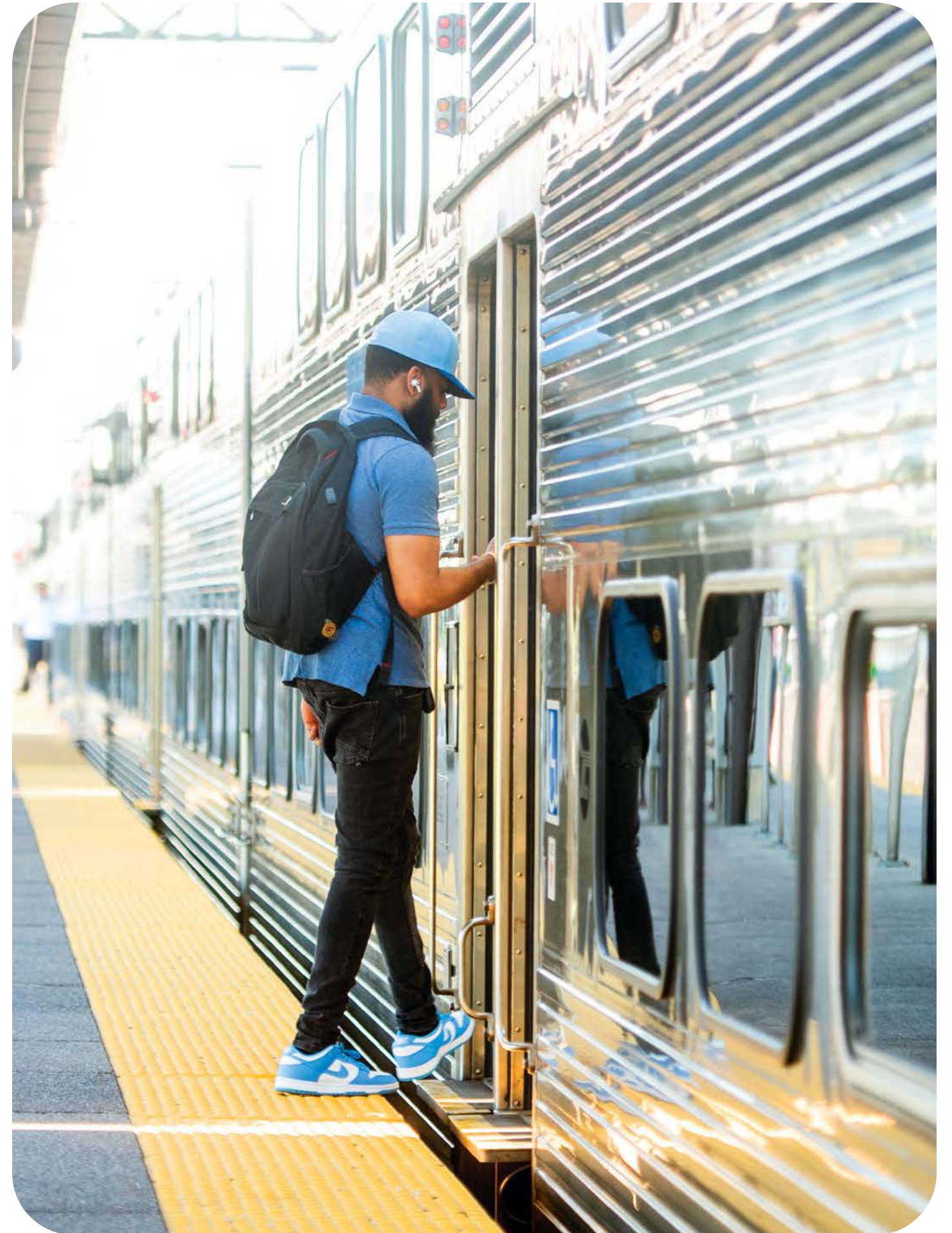
While these activities make important progress on advancing the capital program, there is always room for improvement. The strategic plan process included opportunities for the public and stakeholders to weigh in on the capital priorities for the region. This feedback highlighted a need to provide better understanding of project benefits, and additional transparency to the project selection process with a greater emphasis on climate impact and the rider experience. The Priority Projects Technical Working Group made up of experts from CTA, Metra, Pace, and CMAP considered this input and recommended additional improvements to the existing programming processes. They agreed to continue updating the region's priority project list every year and identified 12 new themes for evaluating capital projects as they're added to the regional program that will be operationalized and applied in the 2023 budgeting process for the 2024 capital program and then measured and tracked going forward. Each of the evaluation themes will have one or two metrics that will be used to measure each project.

# More Operating and Capital Funding Is Needed for Future Adaptation

It is easy to look at Northeastern Illinois' vast network of trains and buses, the millions of riders it carries, and the thousands who operate it and assume it will always be here — as it has always seemed to be. It feels like common sense to assume that while it may never be exactly what we hope it could be, it will always somehow keep running about the way it is now. That it is, “too big to fail.”

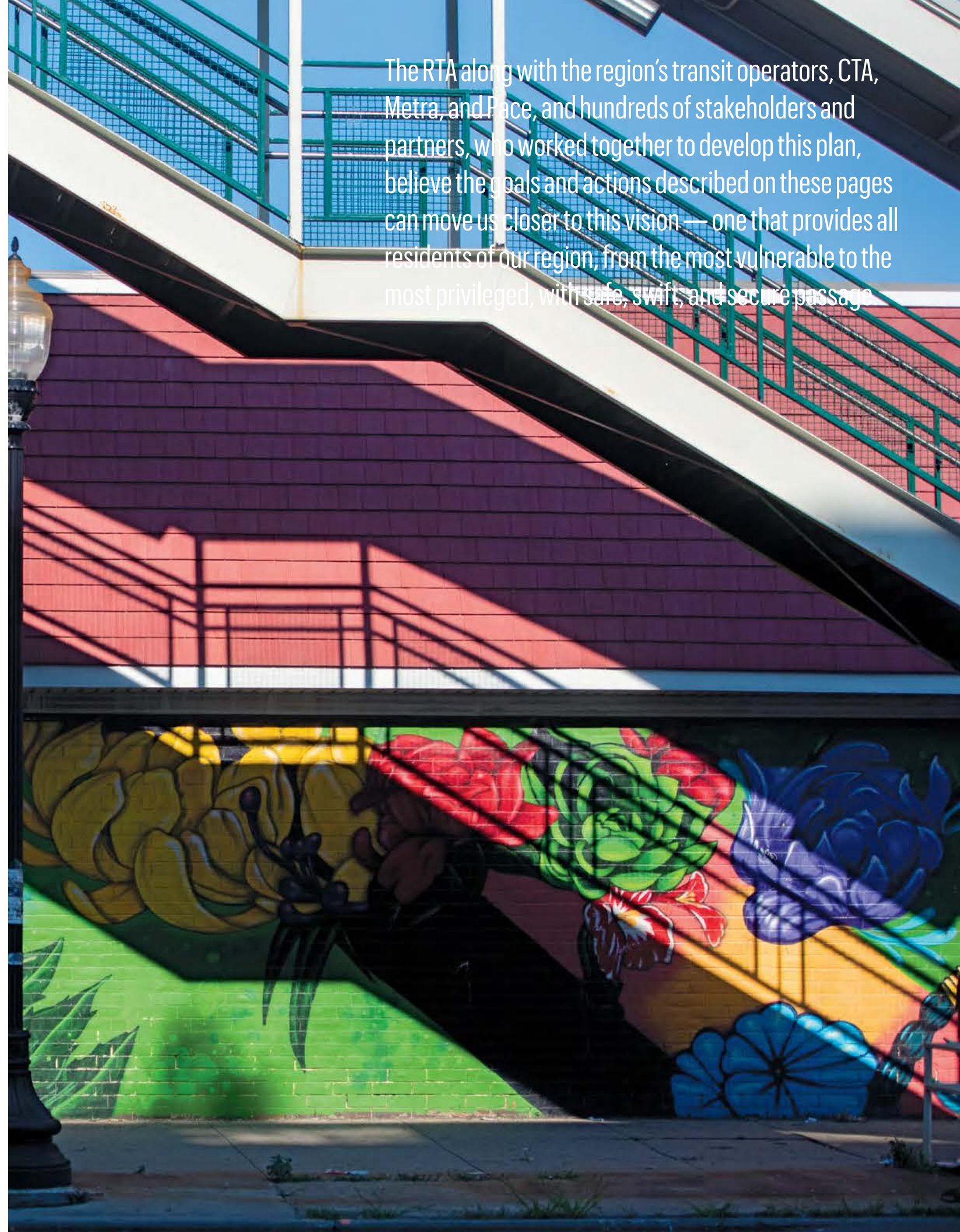
But the facts don't bear this out. The previous pages lay out the unvarnished truth: without advocating on the state and federal level and working together to fund transit operations differently while simultaneously committing to fundamental improvements, our region will hit a point in late 2025 when it can no longer depend on full transit operations. Drastic service cuts could follow, further decimating ridership numbers and creating a downward spiral of revenue and riders. It is a harrowing picture.

A patchwork approach that “bails out” the system but does not address the improvements that we all know must be made and that fails to lay out a sustained approach to funding that prioritizes access and equity may work for a year or two — and then would inevitably lead us back to this same spot.



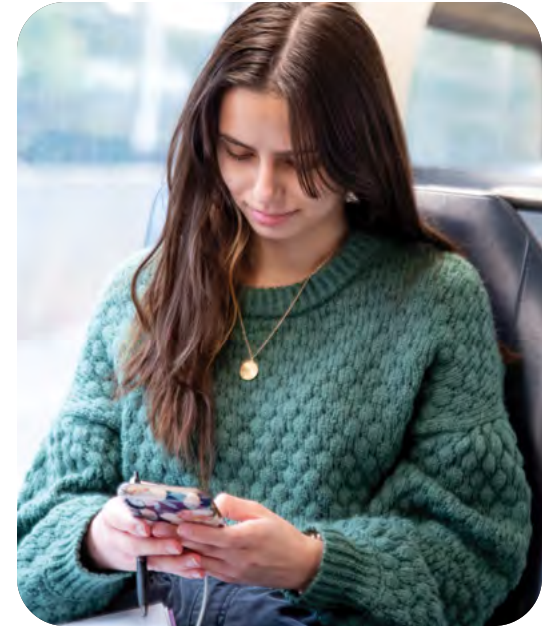
The region and its residents deserve a public transportation system that works better for everyone, and is a preferred option for travel because it is efficient, affordable, and convenient. This plan envisions an unrivaled network of trains and buses across six counties that connects people to opportunity, attracts economic investment, and serves as the beating heart of an active mobility network that enhances public health and serves as our greatest resource in adapting to the impacts of fighting off future challenges of climate change. This vision is within our grasp.

The RTA along with the region's transit operators, CTA, Metra, and Pace, and hundreds of stakeholders and partners, who worked together to develop this plan, believe the goals and actions described on these pages can move us closer to this vision — one that provides all residents of our region, from the most vulnerable to the most privileged, with safe, swift, and secure passage.



Critical to achieving this vision will be taking this opportunity — this moment — to forge a fundamental change in how we fund transit that is less reliant on fares and recognizes the extraordinary value — the inherent public good — that a well-funded and well managed transit system brings.

**The RTA is committed to change, to acting where we can, to advocating tirelessly where we cannot act, and to holding ourselves and our partners accountable.** We ask those who share our vision and passion to join us, to provide your wisdom and feedback, and to work with us in achieving the public transit system we know is possible.



## Regional Riders

### **Ayesha Akhtar, MPH**

Director of Education at the Epilepsy  
Foundation of Greater Chicago  
CTA Green line rider

“Many people are out there living with invisible diseases, like epilepsy, which affects 1 in 26 people. For people with epilepsy, transportation is one of the biggest concerns. In Illinois, if a person has a seizure, they are not allowed to drive for six months, so they are reliant on other ways of getting around, like transit, for their social life, work, appointments, everything.”

“This is a matter of public health. It is a social determinant of health – whether you have access to transportation that is safe and reliable is directly related to your quality of life. If a person living in Aurora has an appointment at Rush Medical Center and they are not able to drive, can they make that trip on public transportation? It also is so important to connecting children to school, adults to work, and other opportunities that matter for people’s daily lives.”

**“Transit is the answer because it can connect people and communities to services, care, education, and businesses — it keeps us all moving.”**



# We're Moving Forward with an Agenda for Advocacy and Action

Over the next five years, RTA and the Service Boards will simultaneously pursue steps toward operating and capital funding stability while also improving the system to ensure that it works better for everyone. The RTA and Service Boards can't accomplish these critical goals on our own. Leadership from the many elected officials and business and community leaders we engaged to develop this plan will be needed to make progress. The agencies recognize and appreciate that stakeholders are ready to stand with us in this pursuit. The Agenda for Advocacy and Action includes 14 priority areas that are outlined in this document.

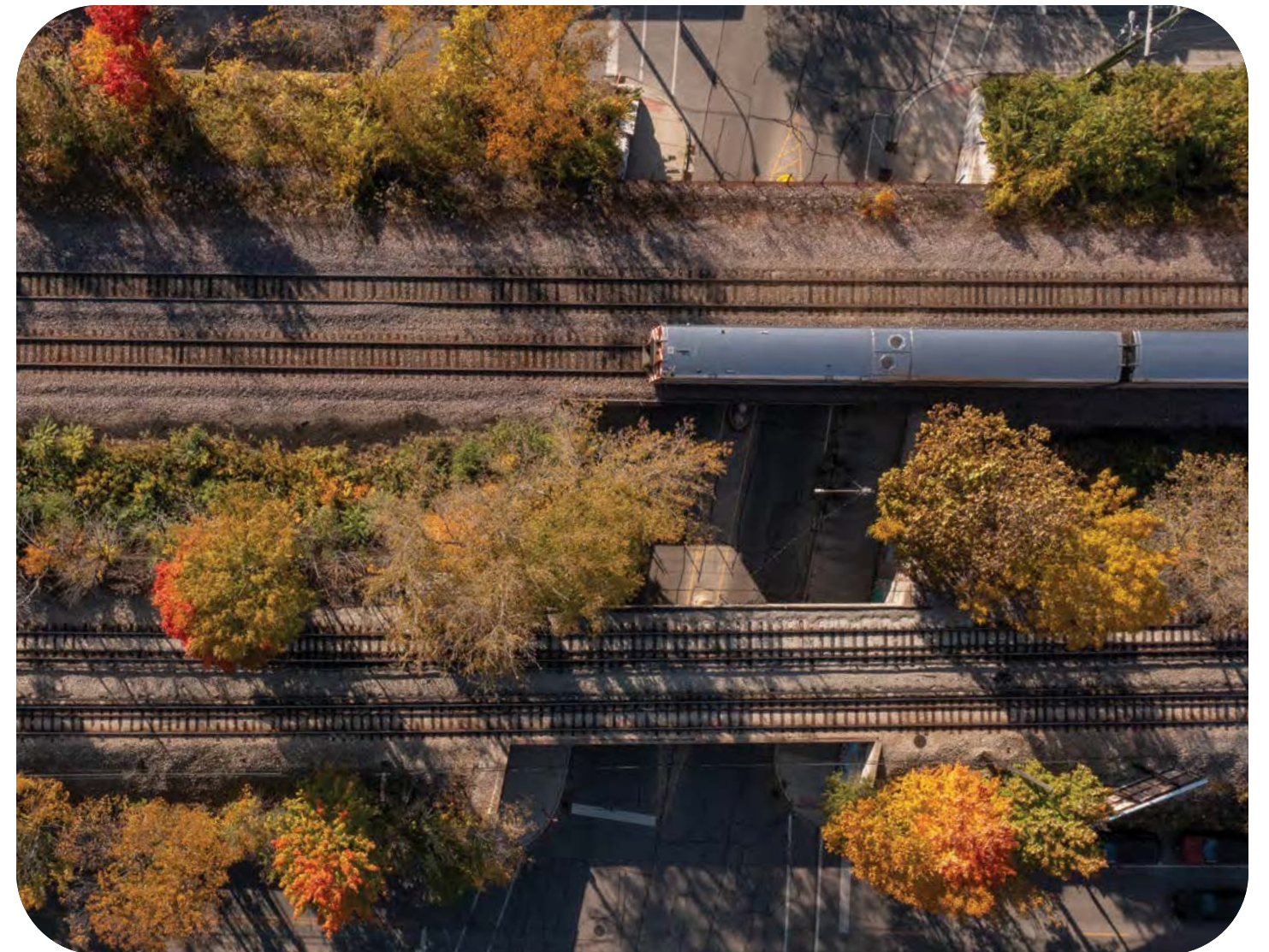
**Advocacy items** include longer-term, substantive changes to how our regional transit system works, and largely include changes that RTA and the Service Boards need support from stakeholders to accomplish.

**Action items** have the potential to be more immediate. They may not be easy but will help address changing and unmet needs of riders and the communities we serve. These are things RTA and the Service Boards can take the lead to implement with the support of our stakeholders.

This agenda provides additional detail related to each Advocacy and Action topic, including subsections that provide a summary of:

- Why the topic is important including supporting data, case studies, and evidence as to why it is critical our region advances this area of Advocacy or Action.
- Input provided by Stakeholder Working Groups conducted as a part of the plan process related to the Advocacy or Action item.

- Highlights of related accomplishments including projects, pilots, and activities that have been implemented since Invest in Transit.
- Activities that the RTA, CTA, Metra, Pace, and CMAP are taking in 2023 to support Advocacy and Action Areas. These are outlined for each agency individually or collectively as relevant. In addition, the items that are listed at the beginning of this plan as shared regional activities for 2023 are noted.
- In the Action areas there is also a short description of what is possible if the region works together to pursue more resources — in many cases more funding but also political will, collective action, and regional capacity.





# ADVOCACY

# AGENDA



01

**Secure increased funding** for transit operations

02

**Develop a funding structure that is less reliant on rider fares**, but instead focused on expanding access to opportunity

03

**Build a coalition** around the value transit brings to the Chicago region

04

**Support communities' efforts** to improve the area around their transit stations and stops and pursue equitable transit-oriented development

05

**Engage with communities** in an inclusive and transparent way about how transit dollars are spent in the Chicago region

06

**Secure increased funding** for transit infrastructure

07

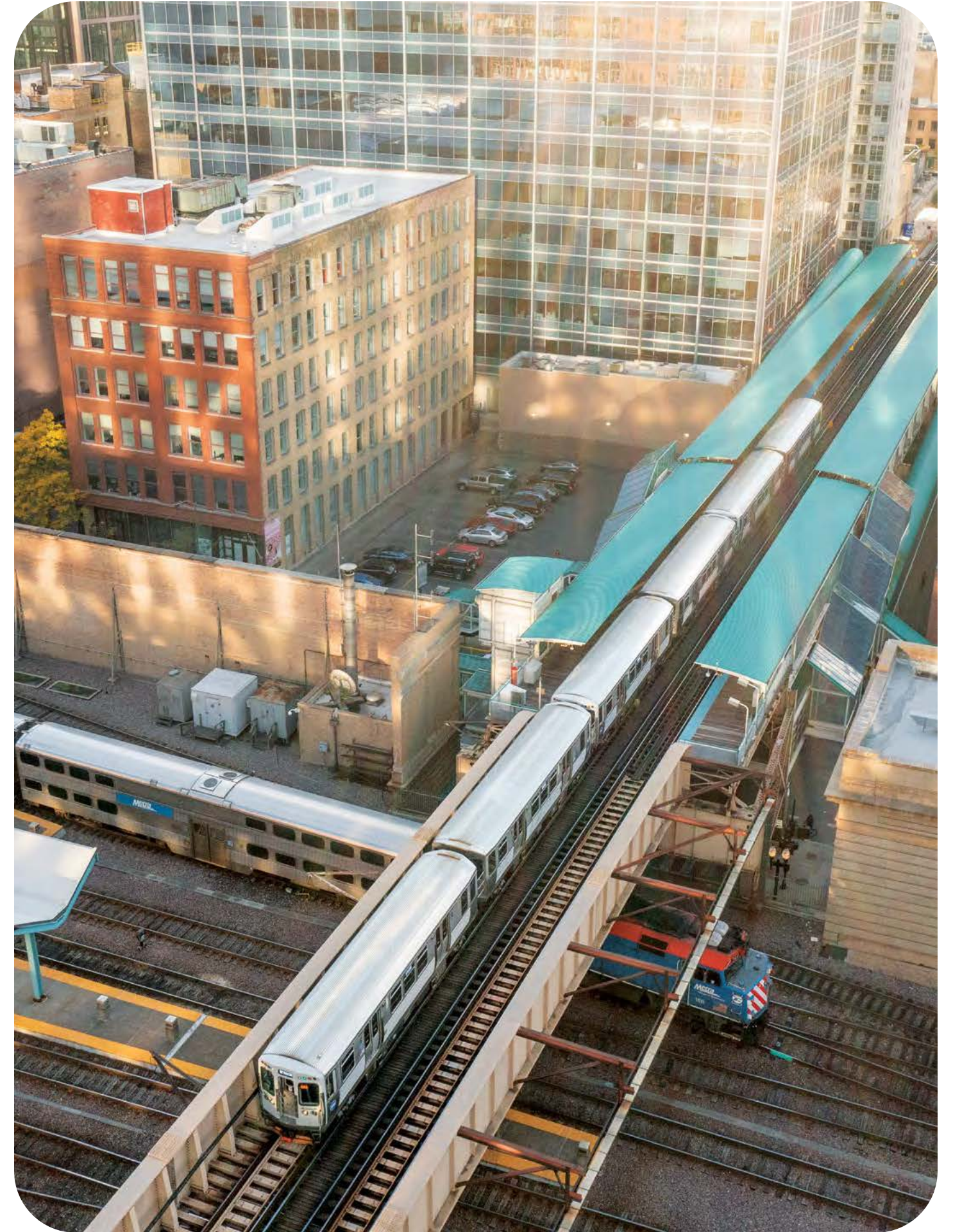
**Partner with roadway agencies** to build more transit-friendly streets and advance bus rapid transit

Advocacy Item:

# Secure increased funding for transit operations

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# 01



### Why this is important

Current funding structures, which rely heavily on rider fares, will not be sufficient to keep transit running at current levels when federal COVID-19 relief dollars run out. Additional public funding is critical to supporting a strong transit workforce, averting major transit service reductions, maintaining affordability, and making possible many of the other improvements suggested by stakeholders and the public through the strategic plan process.

### Input on this topic from stakeholder working groups

With an early understanding of the scope and timing of future operating budget deficits, the stakeholder working groups recommended bold actions to increase and diversify funding sources. Many of the specific strategies informed the policy options in the 10-Year Financial Plan memo.<sup>21</sup> Additionally, working groups encouraged RTA and the Service Boards to find new and innovative ways to control expense growth, such as sharing costs through improved coordination, new technologies, and service partnerships with communities. Working group members also stressed the importance of finding new ways to maximize non-farebox system generated revenue.



### ✓ Accomplishments since adoption of Invest in Transit

- Prior to the pandemic, RTA and the Service Boards annually adopted balanced budgets funded by RTA sales tax, state funding, and fares.
- In 2020, Metra and Pace adapted services and the CTA maintained their service schedules according to the needs of their core riders, while also increasing spending on cleaning and eliminating fare collection. RTA allocated funds from the first federal relief package and put in place a three-step COVID recovery process to provide funding stability to them during that period.
- In 2021, RTA allocated \$486.1 million and \$1.97 billion of funds from the second and third federal relief bills, respectively. RTA secured the discontinuation of the 5% State Public Transportation Fund (PTF) cut effective July 2021, adding more than \$20 million per year in funding for operations. RTA sales tax was implemented on more online transactions effective in January 2021, adding more than \$100 million per year in funding for operations.
- In 2022, the RTA commissioned a 10-year financial plan as a part of this strategic plan project that made longer term projections that have led to the development of this report and the finding that the current funding structure reliant upon fares is no longer viable when federal relief dollars run out in 2025.

### 📣 Advocacy work for 2023

- The RTA and Service Boards will work together with other stakeholders to execute a broad public outreach campaign of education on transit funding and continue to engage a coalition that will secure new, sustainable, ongoing funding.
- The RTA will collaborate with regional partners to identify funding options and develop revenue proposals for the Illinois General Assembly in 2024.



## Pandemic-Era Transit Funding Initiatives Across the United States

Despite the pandemic, **communities around the U.S. continue to recognize the value of public transit and support investments to improve and enhance transit.** In 2021 voters in a variety of states approved 11 out of 11 public transit ballot measures, public transit's first 100% success record at the ballot box. Voters approved 90% of the transit measures in 2020. These measures are large and small; state and local; in mega-regions and smaller urban or rural areas; and in both Democrat and Republican controlled districts.

While most of the potential sources for additional transit funding in our region do not require voter approval, the success of transit measures at the ballot box demonstrates the broad recognition of transit's value and underscores the need for our region to continue investing in our system to maintain competitiveness with peer regions.

Advocacy Item:

**Develop a funding structure that is less reliant on rider fares, but instead focused on expanding access to opportunity**

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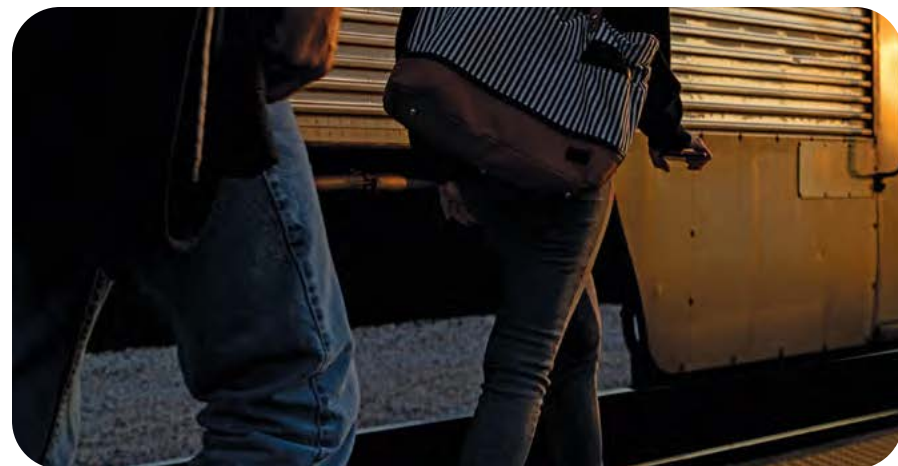
**02**



## Why this is important

Chicagoland's public transit system contributes to our region's economic, environmental, and social health in ways and at a scale that nothing else can. With more resources and a funding structure less reliant on fares, the Service Boards could focus on enhancing service and providing transit coverage across the region which broadens access to areas that have been historically underserved. This would also allow the region to innovate with different fare levels and models, such as seamless transfers or free or reduced rides for residents experiencing low incomes.

Developing a funding structure less reliant on fares and reforming or eliminating the state mandated farebox recovery ratio does not solve the projected operating gap — that can only be done with securing sustainable operations funding. Developing a structure focused on expanding access to opportunity is critical to realizing the vision of safe, reliable, accessible public transportation that connects people to opportunity, advances equity, and combats climate change.



## Input on this topic from stakeholder working groups

Stakeholder working groups articulated a clear need to develop an equity-based funding structure to allow the Service Boards to enhance transit affordability while lowering reliance on fares to balance operating budgets. Specific discussion topics included seeking greater RTA autonomy in the distribution of capital and operating funds; studying and piloting programs to eliminate fares as barrier for access; and working with social services to better understand riders' unmet mobility needs.

## ✓ Accomplishments since adoption of Invest in Transit

- The current funding structure is limiting in many ways, but prior to the pandemic RTA and the Service Boards adopted balanced budgets that met all statutory requirements, including the fare recovery ratio.
- In 2020, the RTA Board approved inclusion of the Service Boards' drawdown of federal relief dollars as a revenue credit for the purpose of temporarily achieving the statutory recovery ratio.
- In 2021, RTA advocated for temporary relief from the statutory recovery ratio, which was granted for 2021, 2022, and 2023.
- In 2022, RTA commissioned a 10-year Financial Plan group as a part of the strategic plan that concluded that the current statutory recovery ratio needs to be reduced or eliminated.

## 📢 Advocacy work for 2023

- The RTA and Service Boards will work together with the Illinois General Assembly to obtain continued recovery ratio relief while developing permanent funding structural reform.
- RTA will work with regional historians, researchers, and other experts to develop materials to educate elected officials, policy makers, and key stakeholders utilizing a variety of platforms on the institutional history of how and why the RTA and Service Boards exist today, how peer and non-peer regions fund transit, and how we might envision a system less focused on maximizing fare revenue and instead focused on maximizing access to opportunity through more equitable fare policies and services.



## Survey of Fare Recovery Requirements Among U.S. Peers

CTA, Metra, and Pace are required by law to bring in enough revenue to cover 50% of the regional transit system's day-to-day operating budget each year (known as the system-generated revenue recovery ratio requirement). Pace's ADA Paratransit is also required to cover 10% of its operational costs through direct revenue.

The Service Boards primarily generate revenue from rider fares, along with ancillary revenue such as advertising income and lease of space. **An informal review of transit systems nationwide revealed few recovery ratio policies similar to the RTA's requirements and none that aimed for as high a share of system-generated revenue.**

The two systems with formal state requirements most akin to the RTA's, the Maryland Transit Administration and Denver's Regional Transportation District, had their 35% recovery ratio requirements repealed in 2017 and 2021, respectively. New York and California require specific revenue targets to apply for state transit funding; however, these are significantly more lenient than the RTA's requirement of 50% of operating funds coming from system generated revenue (primarily fares paid by riders).



## Regional Riders

### Dallas Gordon

Operations Manager

Washington Heights Workforce Center

Metra, CTA rail and bus rider

“Washington Heights is a community on the far South Side that has higher than average unemployment, a higher rate of returning citizens who were formerly incarcerated, and some other challenges, but it is also a place with really great people, a lot of small businesses, a lot of diversity. My number one goal is connecting people to jobs.”

“We’re in what’s called a transportation desert. We have some of the longest commutes of anywhere in the city of Chicago for our residents to get to work — so we need to do two things – bring the jobs to us and enhance public transportation to get people to jobs.”

“And it’s not just jobs, oftentimes for seniors in our area they may have to take three different buses to get to a Walmart. If I can get to the store in 15 minutes instead of an hour and 15 minutes, that changes the whole dynamic of my day. And the reliability matters too. If someone shows up five minutes late to work, they may get turned around, if they do it three times, they don’t have a job.”

“Life changes in a lot of ways when you have connections. The Red Line Extension will have a huge impact, a generational impact on our communities.... There are businesses that will be able to develop near transit, opportunities for housing, jobs for bus drivers and rail operators, people working to clean the station areas and provide security and construction. All of these different things will bring jobs to our community and spotlight some of the great things happening in our area.”

“I envision a future where the wonderful residents in our communities can wake up in the morning and if they need to go someplace, they know that they have the means, the accessibility, the capability to do so using public transportation, that it is going to get them there safely, on time, and get them home. It gives them a reason to stay in this community and be proud. The future is bright. Transit is the answer to making magnificent changes on the far South Side.”



Advocacy Item:

# Build a coalition around the value transit brings to the Chicago region

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# 03



## Why this is important

Public agencies in the United States have been under pressure from advocates and riders to update outreach and decision-making methods for decades. The pandemic and the social movements following the murder of George Floyd in 2020 have led many agencies — including RTA — to reconsider how to effectively engage with taxpayers and riders. This has led to a number of changes in the way that RTA has involved stakeholders, including intentionally inviting a broader and more diverse group of voices to participate in projects and making compensation available to people who do; expanding our communications channels and following to ensure that our work is shared as broadly as possible; and, increasing staffing and resources in governmental and external affairs.

## Input on this topic from stakeholder working groups

Stakeholder working groups recommended finding new ways to quantify the impact transit has on equitable access to opportunity, climate action, safety, public health, and economic development. Working groups also recommended new and innovative approaches in measuring performance such as benchmarking with non-traditional peers and seeking best practices to adopt from other agencies and regions.

## ✓ Accomplishments since adoption of Invest in Transit

- The work of developing this strategic plan in 2022 included many forms of outreach and stakeholder working groups, as described in the Stakeholder Process and Engagement Summary Document. This work made it clear to RTA that a wide variety of stakeholders want to be more involved in strategic planning work. The same work has also made it clear to RTA that any lasting change in transit or transit funding cannot be done in isolation but must involve a broad coalition of stakeholders with overlapping and unique interests.

## 📣 Advocacy work for 2023

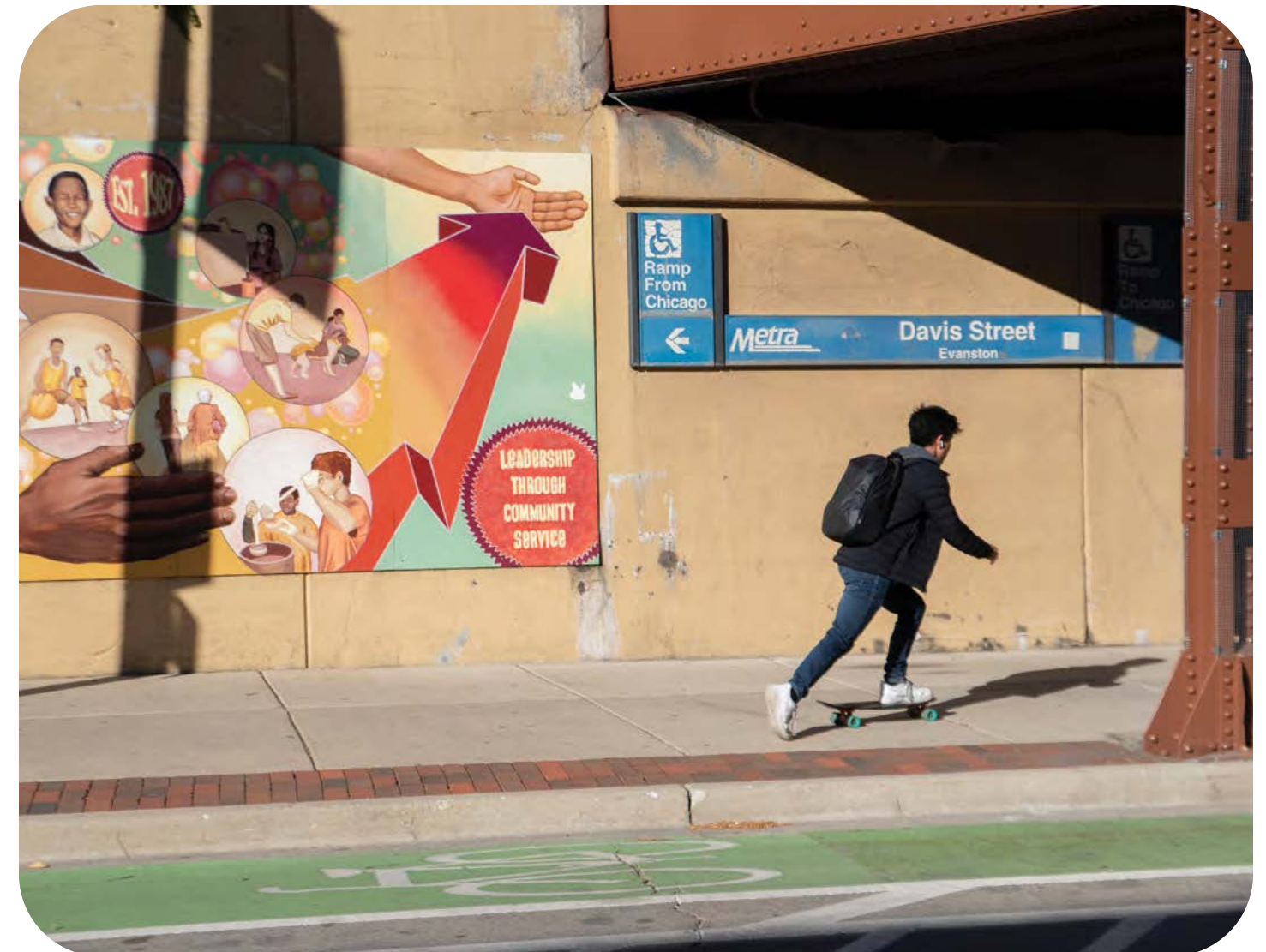
- RTA will activate partners to collaborate on this Agenda through plan endorsement and opportunities to join a coalition that will advocate for increased public investment in transit.

## What our riders value about transit

One of the key questions the RTA has consistently posed in our conversations with riders and residents of the region over the last 18 months is “Why do you value transit?”

We heard a lot about the measurable and harder to quantify value that transit brings to our region. **Transit gives freedom and independence** to people with limited mobility or who don’t own or have access to a car. **Transit connects our communities** and is a place where people from all walks of life come together. These unquantifiable benefits — how transit shapes the character of our communities and our region — support the value that we can put into numbers — the **emissions reduced, the economic impacts, the savings for households and families.**

The RTA will need partners from across the spectrum of businesses, riders, and communities we serve to join in a campaign to change the way our region thinks about and funds transit.



# Support communities' efforts to improve the area around their transit stations/stops and pursue equitable transit-oriented development

04

## Why this is important

Encouraging transit-friendly policies and investment in walking and biking infrastructure for the more than 200 communities within the RTA region will help improve transportation for all. Equitable transit-oriented development (eTOD) is development that enables all people regardless of race, ethnicity, income, gender, age, immigration status or ability to experience the benefits of dense, mixed-use, pedestrian-oriented development near transit. History has shown that equitable transit-oriented development is particularly important in mitigating the effects of gentrification, and the impact that unequal housing costs can have on our communities.

Seventy-four percent of households and 78% of jobs across the region are located within a ½ mile of transit and 33% of households and 32% of jobs are within a ½ mile of full-day, frequent transit (i.e., routes that arrive every 15 minutes or less from 7 a.m.–10 p.m.).<sup>22</sup> RTA offers two programs that provide funding and technical assistance for local governments across Northeastern Illinois to create and implement plans that support transit ridership, meet community economic development needs, expand job and housing accessibility, and improve the overall transit experience. The RTA has invested over \$22 million in local planning initiatives and collaborated on 219 projects through its Community Planning program, which has helped local governments plan for multi-modal, pedestrian friendly, sustainable communities near transit stations and along transit corridors. The Access to Transit program was created in 2012 to provide funding for local governments to construct small-scale pedestrian and bicycle infrastructure projects — such as sidewalks, crosswalks, bike racks, and pedestrian crossing signals — that improve access to transit services. The program has leveraged \$2.7 million in RTA funding to secure \$12.3 million in federal funding for 38 projects in communities across the region.

Even with these programs, there is still work to be done across the region in continuing to maximize the value of transit and to making sure that there is equitable access to affordable housing near transit.

Land use and zoning regulations are critical to supporting transit ridership and equitable transit-oriented development, but are often out of the control of the Service Boards. Individual communities play a big role in supporting transit through their own land use and zoning decisions around transit facilities and through their support of ongoing regional efforts through CMAP programs and initiatives and Pace's transit supportive development engagement program.

Microtransit — the shared programs like bikeshare, scootershare, and ride-hailing transportation that supplement traditional fixed-route service — is one way to help fill first and last mile gaps in low-density areas. Microtransit presents an opportunity to connect housing and workplaces to existing fixed-route transit, and should be explored by communities to extend access to opportunities for

people without cars. That said, microtransit will never provide the transit-supportive environment that is achieved through policies that encourage higher-density development and strong pedestrian connections.

### **Input on this topic from stakeholder working groups**

Stakeholder working groups proposed continuing many of the existing RTA efforts to work with communities to plan for transit supportive development at and around stations and stops, and ways to directly engage with residents and riders in how best to improve access to transit. Additionally, working groups pressed for the creation of more units of affordable, accessible, multi-family housing while preventing displacement of current residents from transit-rich neighborhoods and communities.

### **Accomplishments since adoption of Invest in Transit**

- RTA's Access to Transit and Community Planning programs have provided funding for 61 planning and technical assistance projects in communities throughout the region to support transit-oriented development corridor plans, zoning and financing plans, neighborhood mobility hubs and curb management, developer dialogues as well as engineering and construction projects to address safety and expand mobility for all, and advancing transit-supportive land uses.
- RTA's Community Planning program has broadened eligibility in the last five years to include: curb management plans, neighborhood mobility hubs, mobility improvement plans, and special financing districts. These categories were added in response to changing needs in the region and in the field of transit-oriented development and transit planning. Communities with high need are given priority during project selection and provide a local match based on need.
- As part of the 2022 Community Planning program, the RTA piloted additional funding to applicants of moderate and high need to remove barriers to community engagement. The funding can be used to directly compensate individual residents or members of community-based organizations for giving their time and expertise for participating in project meetings and reviewing documents. Funding can also be used to provide services for public meetings to help residents overcome obstacles that may prevent them from participating such as travel expenses, providing meals, or childcare. This new compensation model was officially included as part of 2023 Call for Projects.

- RTA's Access to Transit Program added a new eligible project category to assist communities with high needs (scarce resources and limited technical capacity) by using RTA funds to pay 100% of Phase 1 Engineering. This change in eligible project category removes a major barrier for communities by funding projects from the beginning design while still offering resources for construction. Since 2020 eight of these projects have been funded. Local match for construction projects is determined based on need. For most projects, the 20% local match required by federal funding sources is shared equally between the RTA and the applicant. The RTA covers the full 20% match for applicants of high need.
- Chicago's City Council adopted the Connected Communities Ordinance to advance equitable development and thriving neighborhoods near transit. Developed in partnership with Elevated Chicago and over 80 stakeholders, the ordinance will support Chicago's economic recovery and foster thriving neighborhoods across the entire city so that every Chicagoan is able to live in a vibrant, healthy and affordable community that connects them to transit and makes it easier for them to get to what they need — from jobs and schools to services and more.

### **Advocacy work for 2023**

- RTA will proactively work with communities to apply and participate in RTA's and CMAP's funding programs to build more transit-friendly neighborhoods. This will include promoting equitable transit-oriented development, creating plans to construct mobility hubs, and curb management plans making it safer and easier for people to walk and bike to transit stations and stops and to better align with existing economic and workforce development efforts.
- RTA will update the Setting the Stage for Transit report, to set standards for communities that host transit services and hold them accountable for land-use decisions and improving access to transit to ensure that our riders can travel safely and efficiently.

A station area that embodies the tenets of equitable transit-oriented development includes affordable housing options that allow for a diverse variety of residents, many of whom rely on high-quality transit options to move around, a mix of offices, businesses and services for residents and workers — all within a walkable, livable neighborhood.



Equitable transit-oriented development in lower-density and/or suburban neighborhoods include a variety of housing options that are affordable to all, mobility options, local businesses and small office spaces, and destination outdoor amenities, all within a pedestrian-friendly environment.



## Regional Riders

### Roberto Requejo

Executive Director, Elevated Chicago  
CTA Blue line rider

“Equitable Transit Oriented Development, or eTOD, is development near transit that is walkable, that is beautiful, that is safe. And that takes into consideration the needs and the demands of our people of color, women, and transgender residents — a lot of people who have been traditionally excluded from the processes that determine where development happens. We want to bring them to the table and give them power to develop the type of communities they want to see.”

“Unfortunately, when you say Chicago, we are an example of segregation, but we have the ability right now to completely change the narrative. A future where all communities have access to affordable, reliable, safe transit and development near that transit that makes it easy for everybody to access opportunity.”

“We have a lot of work to do, but we also have a lot of great people to do the work. There is a lot of talent in our communities with residents that have the solutions and the ideas that some of what we call experts do not have.”

“Transit is a basic need for a region to succeed. If you look at cities across the world, the most successful ones, what they all have in common is great transit system. If we lose transit, we are losing our competitiveness as a global region, we’re losing equity, we’re making our region more segregated and more disconnected from opportunity. Transit is a necessity for the Chicago region to grow, to combat climate change, to bring us back from a terrible and dramatic public health crisis that we just had, to bring back equity and to save people a ton of money. There is no future for Chicago without a strong transit system.”

“Transit is the answer. El transito es la respuesta.”



# Engage with communities in an inclusive and transparent way about how transit dollars are spent in the Chicago region

05

## Why this is important

The RTA is committed to cultivating relationships between riders and transit agencies with two-way engagement that empowers communities' role in transit decision making.

## Input on this topic from stakeholder working groups

Stakeholder working groups suggested strategies to increase transparency and communications with communities regarding transit funding and spending. This included articulating needed and desired information on transit investment in easily understood language and accessible formats, evaluating current outreach efforts to identify ways to improve, and developing community advisory groups to provide feedback and build further capacity for community input in all elements of transit planning.

## ✓ Accomplishments since adoption of Invest in Transit

- The RTA has made several changes to increase the transparency and usability of data coming from the annual regional transit operating budget and capital program process.
- The RTA budget book was redesigned for communication and evaluation of proposed Service Board operating budgets and capital programs. The capital budget is published on RTAMS, RTA's website for accessing extensive data resources about the regional transit system, and provides analysis related to Invest in Transit including Priority Projects, Core Requirements, and Strategic Goals. RTA's Project Management Oversight (PMO) program monitors the progress of projects in the capital program.
- RTA launched a financial results online dashboard in April 2022 that displays an overview of financial data monitored by the RTA compared to adopted budgets.
- RTA's Board meetings are open to the public virtually and in-person and are livestreamed. Significant updates were made to the RTA website in 2021 and 2022 to make Board agendas, memos, minutes, and recordings easy to find and view.
- In 2021, RTA updated the RTAMS website, including adding a new mapping and GIS portal, providing downloadable datasets, and making the site faster, mobile friendly, and more interactive and transparent.
- In 2022, stakeholder working groups indicated that even more transparency is needed.

## 📣 Advocacy work for 2023

- RTA will expand the role of the RTA Citizen Advisory Board (RTACAB) to strengthen the rider voice in transit planning and decision making. The RTACAB will help track progress toward the goals of strategic plan.



## Regional Riders

### Courtney Cobbs

Co-founder of Better Streets Chicago

CTA Red line rider

“Transit is the number one reason why I moved to Chicago, I wanted to live in a city where I didn’t need a car to do every single little thing. Primarily, I get around by bike, but I use transit for longer trips.”

“Transit is the answer for keeping our region accessible, affordable, and sustainable. Better transit gets people out of their cars, and with fewer people and cars that creates safer streets for people who are walking and biking. It also makes transit faster and more reliable because you’re not having as many vehicles competing with buses.”

“My dream is that people begin to see transit as their first option. ‘Why wouldn’t I take the bus, it’s so fast, it’s so convenient, why would I get a car? Why would I get a ride share? The bus is so convenient these days, they’ve made great changes. I love riding the bus.’ Right now, I don’t hear that from people.”

“One way to get there is by engaging the riders. I don’t think a lot of transit riders know that we can make transit better. I think people just think the bus is slow and this is how it is. But with Better Streets Chicago, I get to have conversations with people and let them know, ‘Did you know it’s possible for the buses to trigger a green light so that you can move through the intersection faster? Did you know that Los Angeles has more miles of bus only lanes than Chicago?’ By talking to the riders and potential riders, that is how you create a base of people that will email or call their elected officials and say, ‘We want better.’ But I think the first part is just making people aware that it can be better.”

“I’m pretty optimistic. I think the current challenges provide fertile soil for improvements if enough people make enough noise. I don’t want it to become a situation where it’s just so bad that we give up. I think this can really be a turning point.”



**Advocacy Item:**

# Secure increased funding for transit infrastructure



06

**Why this is important**

Capital needs, the money required to maintain and invest in new infrastructure, such as vehicles and stations, are significant. Capital funding comes primarily from the federal government, through grants administered by the Federal Transit Administration, and, periodically, from bonds — borrowed money — issued by the State of Illinois or directly by the RTA and the Service Boards. Unlike our operating funds, which come primarily from local/state taxes and farebox revenue, these federal funds are provided by annual appropriations or by legislation passed by Congress, such as the recent IIJA. While the federal infrastructure investments are critical to meeting the capital needs of the region, additional sustainable funding is needed to address decades of underinvestment and respond to changing post-COVID rider needs. Historically, roadway agencies have received significantly more money for transportation projects than transit agencies, but the economic, equity, and climate benefits of transit suggest that a change should occur to how funding is allocated.

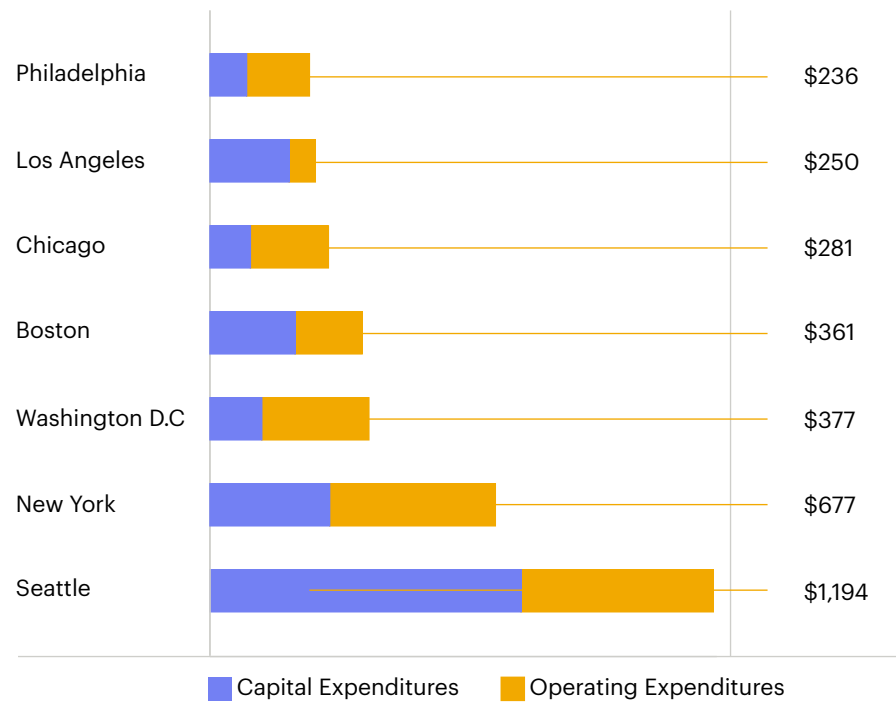
The Service Boards demonstrate, on an annual basis, the great need for additional capital infusions. The region's 2022 capital program identified 75 Priority Projects for the next 10 years with a total cost of \$36.2 billion.<sup>23</sup> The 2022–2026 5-year capital program only funds 14.5% of this total 10-year need, with only four of the projects fully funded. Important projects to maintain and transform the regional transportation system are delayed as the Service Boards work to put funding strategies together to advance key projects.

- CTA has been able to advance the first phase of the Red and Purple Modernization project, but another \$6 billion is needed to complete the project and bring the Red Line north into a state of good repair. CTA is also planning to extend the Red Line south to 130th Street, a major investment for transportation equity in our region. CTA has advanced this \$3.6 billion project in the federal New Starts program and is currently working to establish resources for a local funding match.
- Metra is continuing to work on replacing bridges along the Union Pacific (UP) North line, which has bridges dating to the 1800s. The initial set of bridges crossing over 11 streets have been replaced, and Metra is working on securing over \$100 million in additional funding to complete the next set of bridges. Another key project, the A-2 interlocker, which will untangle the UP and Milwaukee District lines and save commuters significant time, is unfunded and will require over \$750 million to be designed and constructed.
- Pace is preparing for the transformation of its bus fleet and support facilities to cleaner energy sources. Pace has been able to program nearly \$270 million to date but more funding will be needed to expedite the transition to a cleaner future.

**Chicago is not investing as much per resident in its transit system as peers**

Annually our region spends \$281 per resident for our transit system. \$96 of those dollars go towards capital improvements to maintain and improve the system, and \$185 go toward funding the system’s day-to-day operations.<sup>24</sup> **Traditional regional peers, such as Washington D.C. and New York are annually spending 34% – 141% more per capita on transit, while Seattle spends over 300% more per capita than the Chicago region.**

Figure 8: Annual Capital Expenditures and Operating Funding Expenditures per Regional Resident in Chicago and Several Peer Regions, 2020



**Input on this topic from stakeholder working groups**

Stakeholder working groups recognized the need to invest in maintaining the system in a state of good repair, while distributing funds equitably and taking steps to modernize and improve the user experience. To that end, transit should receive an increased share of total transportation funding; additionally, highway congestion reduction programs should be broadened to include transit whenever possible. Grant programs should be structured to enable smaller and under-resourced communities to tap into available funds and ensure that we equitably balance the needs of different markets and communities. Additionally, legislation should be advanced to require transit infrastructure be provided by employment centers and that transit value-capture mechanisms be distributed equitably.

**Accomplishments since adoption of Invest in Transit**

- The State of Illinois enacted the Rebuild Illinois Capital Plan in 2019, the first State of Illinois capital bill in more than a decade and the largest in Illinois history that provided the RTA system with \$2.6 billion over five years in state bond funding and an estimated \$227 million annually in gas tax revenue.
- Transit Tax Increment Financing (Transit TIF) was enabled by the State of Illinois and the City of Chicago in 2016. The program is expected to generate \$622 million in local matching funds for the CTA Red Purple Modernization project.<sup>25</sup> A Transit TIF has also been approved for the Red Line Extension project to fund a significant share of the local funding.
- The Infrastructure Investment and Jobs Act (IIJA) was signed into law in November 2021. The program is a significant investment in the nation’s transit infrastructure, with northeast Illinois slated to receive at least \$4 billion in federal funds for public transit over the next five years, over 40% more than in the previous five years.<sup>26</sup>
- RTA and the Service Boards have continued updating the Invest in Transit Priority Project List to articulate changes in need as well as new regional priorities, such as bus electrification, each year during the budget process.

**Advocacy work for 2023**

- RTA will work with the Service Boards to continue to update the regional Priority Project list to communicate to stakeholders and the public the acute need for sustained capital investment to both maintain and improve the system.
- RTA will conduct a specialized analysis of the regional capital program to show the impacts of Rebuild Illinois funds and other funding sources to elected officials and others who have made this funding possible.

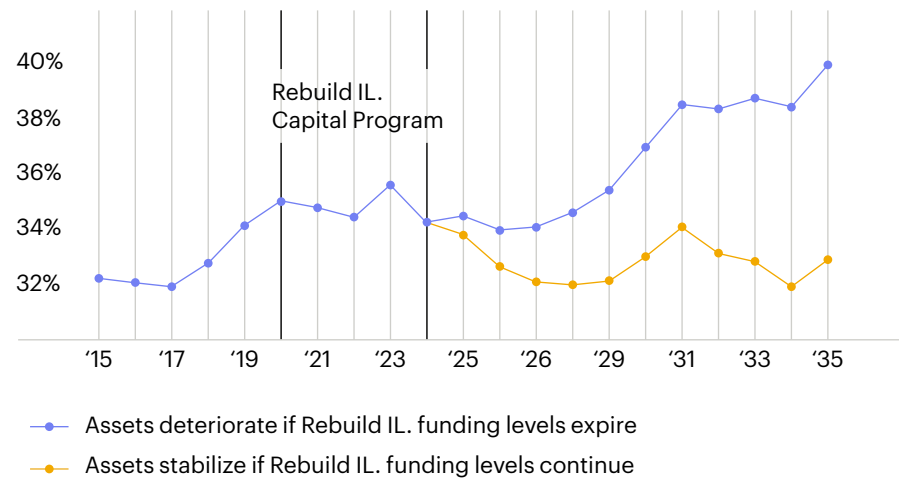
- RTA will introduce a new project evaluation system, that will transparently provide information on 12 themes in order to better communicate regional importance and impact of the projects that are advancing in the 5-year capital improvement program.

**Why does it matter?**

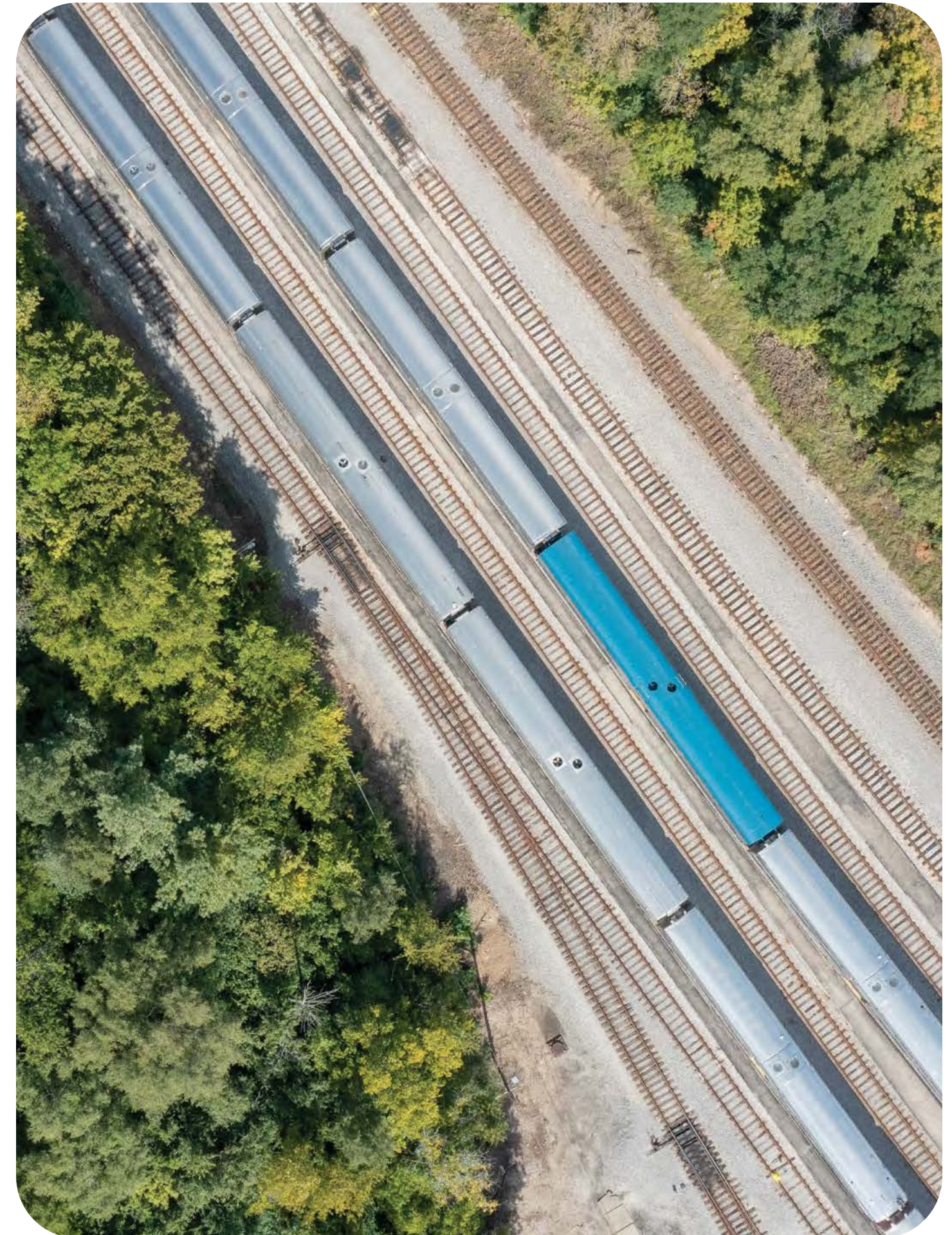
Our regional transit system encompasses approximately 1,500 miles of tracks, 7,500 vehicles, 400 stations, and 70 maintenance facilities worth more than \$60 billion.

This portfolio of transit infrastructure needs **an annual investment of \$2–3 billion over the next 10 years to address chronic disinvestment and to get into a “state of good repair,”** or a condition where the infrastructure is not at risk of failure or impeding the provision of quality transit service to customers.

**Figure 9: Projected Percentage of Regional Transit Assets Exceeding Useful Life from 2015–2035**



In addition to transit’s myriad social and environmental benefits, transit investments can have substantial economic benefits. The American Public Transit Association (APTA) estimates that for every \$1 billion invested in public transit, 50,000 jobs are created or sustained.<sup>27</sup> The employment benefits are even greater in communities with high unemployment. APTA research also shows that every dollar invested in public transit has approximately a five-fold return on investment over twenty years. The returns they measure include direct impacts of investment spending as well as productivity benefits such as increased business productivity, reduced traffic congestion, and user cost savings. Measuring these types of benefits has been a growing priority of federal policy.



**Partner with roadway agencies to build more transit-friendly streets and advance bus rapid transit**

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# 07



## Why this is important

Dedicated space on roads for Pace and CTA buses is critical to improving speed and reliability. It will take a coalition to inspire the political will within the highway and road agencies to build more transit-friendly streets and bus rapid transit (BRT) in the Chicago region. Since the start of the pandemic, both CTA and Pace bus modes have retained more riders than rail modes in our region. Buses often carry people more reliant upon transit and play a critical role in connecting neighborhoods in areas lacking access to the rail network. Furthermore, transit-friendly streets not only move buses more quickly, but they can strengthen and safeen all modes and contribute to the development of complete streets for all users.

In recent years bus speed, reliability, and ridership have declined with growing congestion on local streets and competition with ride-hailing services. Transit-friendly streets can help free buses from congestion and give buses well-deserved priority over single-occupancy vehicles. With more resources, RTA, the Service Boards, and roadway agencies could build more widespread Transit Signal Priority and BRT corridors. In addition, more cultural and political support is needed to meaningfully expand BRT in the Chicago region.

## Input on this topic from stakeholder working groups

Stakeholder working groups recommended advocating for the prioritization of transit over cars when allocating street space, advancing legislative measures to allow camera enforcement of dedicated bus lanes, and working with local communities to ensure transit is prioritized during long-term roadway construction projects. Working groups also focused on activating partners in local government, business, and advocacy communities to build support for BRT projects.

## Accomplishments since adoption of Invest in Transit

- RTA has continued to work with Pace, CTA, and Chicago Department of Transportation (CDOT) to implement Transit Signal Priority (TSP). CTA and CDOT implemented TSP on Western Avenue between Howard Street and 79th Street. They are currently designing TSP improvements for Ashland Avenue between Irving Park Road and Cermak Road (2019).
- Pace implemented TSP on Milwaukee Avenue, between Golf Road and Jefferson Park Transit Center, as part of the Pulse Milwaukee Line project. After completion of TSP testing on Milwaukee Avenue in early 2021, Pace began implementing TSP on other corridors beginning with Dempster Street and Roosevelt Road (2022).

- Pace’s Driving Innovation plan includes initiatives supporting transit friendly roadway design including Rapid Transit programs, Transit-Supportive Development Engagement, and Tactical Transit Pilots.
- Pace has advanced several Pulse Corridors. Pulse Milwaukee Line has been implemented. Pulse Dempster Line is under construction. Pulse Halsted Line and Pulse 95th Street Line are being designed. RTA has worked with Pace to implement TSP in conjunction with Pulse service on all of these corridors.
- RTA and the Service Boards are participating in the Illinois Department of Transportation (IDOT) and CDOT redesign of North DuSable Lake Shore Drive and continue to advocate for alternatives that prioritize transit.<sup>28</sup>
- CTA and CDOT are completing the Better Streets for Buses project to lay the groundwork for ongoing bus infrastructure improvements by establishing a network of corridors to prioritize and a toolbox of street treatments to consider as solutions to facilitate faster, more reliable bus service and improve the bus riding experience (2022).<sup>29</sup>
- CDOT Strategic Plan for Transportation set a goal to “Partner with CTA to reduce commute times and improve the transit experience for all Chicagoans” including benchmarks of installing 2-3 permanent bus lane projects, installing an additional 100 transit signal priority intersections, increasing in-house transit planning and implementation capacity, and making station access improvements to five CTA stations and one Metra station by year three of the plan horizon (2021).<sup>30</sup>
- CDOT Strategic Plan for Transportation set a goal of “Make it safer and easier to walk in Chicago” including strategies of reviewing and revising the Complete Streets Policy and a benchmark of partnering with CTA and Metra to identify transit access goals and priority locations (2021).<sup>31</sup>
- IDOT Long Range Transportation Plan set an objective to “Invest in and support multimodal transportation infrastructure improvements and strategic performance-based expansion of services that support the effective movement of passengers” including strategies to implement signal prioritization and improving multimodal corridors via bus rapid transit, bus-only/managed lanes, bicyclist signals or express bus (2019).<sup>32</sup>
- In 2022, working group members noted to RTA that this is an important area of advocacy. Moreover, the strategic plan survey conducted in fall 2022, indicated that this was in the top three most urgent advocacy areas.

## Advocacy work for 2023

- RTA will continue to advance Regional TSP Implementation work and can make available grant funding to assist agencies to hire staff and consultants as needed to implement TSP.
- RTA will work to advance BRT implementation across the region by funding and supporting corridor planning projects and by advocating for IDOT, CDOT, county DOTs, and local government agencies to champion bus projects, improve their arterial roadway design, and to secure more dedicated space on regional roads in order to bring the region more in-line with peer regions in transit way mileage.
- RTA will work to advance bus lane camera enforcement legislation, recommended by working groups.
- Pace will identify priority corridors for expansion of Pulse routes as part of their Network Revitalization and Systemwide Restructuring Initiative.
- CTA will work with CDOT and other partners to implement recommendations of Better Streets for Buses study.
- CMAP will work with regional transportation stakeholders to:
  - › Strengthen the implementation of Complete Streets through legislation, guidance, and technical assistance, with state and local partners.
  - › Update the Congestion Management plan in 2023.
  - › Advance Mobility Recovery recommendations on BRT, dedicated transit infrastructure, and other tools to improve bus speed and reliability.
  - › Seek categorical safety exemptions for transit/bus improvements on roadway to speed up project delivery.



## The Benefits of BRT

Bus Rapid Transit (BRT) is an enhanced bus service characterized by features like dedicated lanes, transit signal priority, off-board fare payment, high frequencies, limited-stop service, raised-platform boarding, and distinct branding. These features are meant to make bus service more efficient and reliable, like rail rapid transit systems with a much lower capital cost.

**BRT projects around the U.S. have led to significant improvements in travel times, with some of the most effective projects cutting travel times in half for riders.<sup>33</sup>**

Individual elements of BRT are often used in a tactical manner to improve operations when fully overhauling a corridor is not feasible. BRT deployments have been shown to attract substantially increased bus ridership — ranging from increases of 20% to nearly doubling ridership — and analysis from CMAP has illustrated the potential for significant impact in our region.<sup>34,35</sup> Bus services in the RTA region that incorporate features of BRT include the Loop Link, the Pulse Milwaukee Line, the Jeffery Jump, and Bus-on-Shoulder express services.

### **BRT in the Chicago Region**

Compared with peer regions, the Chicago region dedicates very little roadway space for public transit. Transit agencies serving cities like Los Angeles, Seattle, Miami, Minneapolis, Houston, and Phoenix all have over 100 miles of transit-only or transit-priority roadway lanes. Chicago has less than 15 lane miles in this category (before counting “bus-on-shoulder” corridors.) Fortunately, the region’s transit agencies are advocating for transit-priority roadway designs through efforts like CTA’s Better Streets for Buses and Pace’s Rapid Transit Program, which includes Pulse and Bus-on Shoulder express bus programs, but our region will need to work collectively to accelerate and fund these projects to catch up with peer regions.

One local success has been Pace’s Bus-on-Shoulder operations, which have now been operating for 11 years. This program has demonstrated how interagency partnerships that prioritize transit can attract substantial ridership growth. Shoulder riding was first authorized along certain sections of I-55 (the Stevenson Expressway) in 2011 as a two-year pilot. The program was made possible through state legislation and a partnership between IDOT, State Police, RTA, and Pace. Pace reported that ridership in the I-55 corridor grew faster than anywhere else in the region, requiring new Park-n-Ride facilities and an expanded fleet.

Since 2011, the program has been made permanent and expanded to include the shoulder of I-94 and the Flex Lane of I-90. The Illinois Tollway has partnered with Pace to facilitate these expansions. Plans are also in place for buses to use new Flex Lanes along I-294.





Pace also launched the Pulse Milwaukee Line in 2019 after extensive coordination with stakeholders including the Village of Niles, the City of Chicago, and IDOT. Pulse Halsted Line and Pulse 95th Street Line are also being designed. The Pulse program is a form of rapid transit that features frequent limited-stop service, branded vehicles, raised platforms for faster boarding, and accessible stations with vertical markers, real-time information, heated shelters, and snow-melt systems. Pace's second Pulse corridor, the Dempster Line, is currently under construction. Several other planned Pulse corridors are in various stages of design and planning.

### What we can learn from other regions

Examples of BRT projects from other regions around the country underscore the importance of coordination between transit agencies, the agency that manages the street, and other stakeholders to successfully implement BRT; demonstrate BRT projects' impacts on ridership and travel times; and highlight how BRT projects can improve safety and mobility for people walking and biking on these corridors.

In the Minneapolis-St. Paul metro area, Metro Transit (the main transit operator and a division of the region's Metropolitan Planning Organization) currently operates four BRT lines, including one operating in lanes and stations constructed by the Minnesota Department of Transportation along I-35W. These lines were first studied in 2011-2012, resulting in the implementation of the METRO A Line in 2016 and the METRO C Line in 2019. Metro A Line saw ridership increase by about one-third compared to 2015.<sup>36</sup> Metro Transit is opening four additional lines between 2022 and 2025.

Metro Transit recently used a four-step process for identifying the next BRT priorities, based on four principles that guided the planning process for BRT, rooted in public engagement, Metropolitan Council transit policy, and the performance of the bus network:

- Advance equity and reduce regional racial disparities
- Build on success to grow ridership
- Design a network that supports a transit-oriented lifestyle
- Ensure the long-term sustainable growth of the bus network

As a result and pending funding, three additional lines would be operational by 2030; seven additional corridors studied in Network Next remain candidates for BRT between 2030 and 2040.

Opened in April 2022, the Van Ness Bus Rapid Transit system is a nearly 2-mile dedicated bus corridor on Van Ness Avenue in San Francisco, one of the busiest north-south corridors in San Francisco serving over 16,000 SFMTA customers daily. It is San Francisco and the San Francisco Municipal Transportation Agency's (SFMTA) first BRT project. The BRT corridor uses dedicated center-running bus lanes (as opposed to curbside lanes) and was part of a larger \$346 million Van Ness Improvement Project, which was funded by FTA Formula Funds and a mix of local, regional, and state funding.

In addition to improving transit speed and reliability, the project also aimed to increase pedestrian safety, improve access to transit, and enhance the public realm. Bulb-outs (also called curb-extensions) and median refuge spaces shorten crossing distances for pedestrians and passengers alike. Improved, extended, and accessible countdown signals are now located at every crosswalk and at the locations for boarding platforms. Enhanced traffic signals with Transit Signal Priority give buses the green light as they approach an intersection, lessening travel time and improving on-time performance. Newly paved and expanded sidewalks, bright lighting, natural landscaping, and public art all contribute to creating a vibrant corridor.

While the project was long in the making, the Van Ness BRT has brought immediate results in boosting ridership and bus travel times. Just one month after its launch, the BRT is operating closer to light-rail transit speeds and saving weekday riders around 35% in travel time — about 15 minutes on a full round trip. The project has also led to more reliable travel times for riders. The sole line currently operating on the Van Ness BRT, 49-Van Ness/Mission, saw a 13% boost in ridership.<sup>37</sup> City officials hope the success of the Van Ness BRT will influence similar projects to improve the transit riding experience and bring riders back to the system.



## Regional Riders

### Sebha Faheem

CTA, Metra, and Pace rider

"I live in the city but use transit to get to work and visit family in the suburbs. I use public transportation for everything I do. I recently ran the numbers on how much I spent on my car and thinking about how much I didn't like driving. I wanted to try to build a life where I wouldn't need to depend on my car, so I sold it and it has honestly been so relieving to not have to worry about traffic, parking, and everything else. I want to live a sustainable life and taking transit is a huge part of that, knowing that my carbon footprint is a lot smaller without a car."

"The biggest issue for me is having it run more frequently and not getting delayed, those minutes add up. And having one pass for all three systems would make life so easy. I ride CTA, Metra, and Pace so I don't want to have to think about buying separate passes, it could make everything so much more seamless."

"I grew up in Crystal Lake in McHenry County and I can take the Metra there, but I know as soon as I get there, we have to drive everywhere. Most places aren't built for people to walk around, they're built to be driven in, but if there were more buses, more transit options, that would really make a difference."



# ACTION



# AGENDA



01

Make the transit system **safer and more secure for everyone**

02

Use new funding as a catalyst to create a **fully accessible transit system**

03

Provide more accurate, **real-time travel information for riders**

04

Make paying for transit more **seamless and more affordable**

05

Accelerate the transition to a **zero emission regional transit system** and prioritize communities burdened by poor air quality

06

Assess the **regional capital program in a new way** including considerations for racial equity and mobility justice

07

Adapt bus and rail service to **meet the changing needs of riders**

Action Item:

# Make the transit system safer and more secure for everyone

01

## Why this is important

All riders need to feel safe riding transit. A safe and secure system is also necessary to attract, retain, and protect a talented transit workforce. While the transit system is part of a larger regional ecosystem with other economic and societal trends at play, there are several steps the Service Boards can take to improve safety, work with community partners, and communicate about disruptions on the transit system. These steps include non-security related safety issues that are equally important to educating riders on safe practices while using transit.

## Input on this topic from stakeholder working groups

The stakeholder working groups focused on improving the ways in which riders can communicate with operators and law enforcement when experiencing a safety issue, such as adding reporting capability to the Ventra app as well as suggesting improvements to cleanliness and lighting of transit stations and facilities. In response to perceived and actual increases in rates of crime on transit, working group members pushed for justice-centered approaches to violence reduction, such as affordable housing, mental health care, and living wages.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- More than 2,000 new HD cameras have been installed at nearly 60 stations across the Red, Blue, Brown, Green, Orange, and Pink lines as part of Safe and Secure, the CTA's multi-year, multi-faceted program to modernize and further expand its extensive surveillance camera network (2021).<sup>38</sup>
- CTA expanded the use of contracted security services by adding more than 50 K-9 new security patrols (canine with two handlers) at targeted locations throughout the rail and bus system (2022).<sup>39</sup>
- CTA was awarded \$14.8 million through the Department of Homeland Security's Transit Security Grant Program to fund transit-related security initiatives and activity in collaboration with Chicago Police Department (2020).<sup>40</sup>
- Metra Police Department significantly increased the frequency of station checks on the system (2020, 2021).
- Metra conducted 51 "Operation Lifesaver Safety Blitzes" at train stations in 2022 as part of its ongoing efforts to raise awareness of the importance of safe behavior around its trains and tracks.<sup>41</sup>
- Metra developed the COPS smartphone app to allow riders to report safety and security issues on Metra trains and facilities (2019).

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## Shared Activities

The agencies will continue to partner with local police departments and social service agencies to deliver on their efforts to provide security on transit. Additionally, agencies will work together to convene a cross-sector and cross-regional public safety and security summit to facilitate information sharing and explore holistic solutions to the challenges affecting transit, including advocating for further funding.

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## RTA

Lead development of summit described in Shared Activities.

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## CTA

CTA's Meeting the Moment Action Plan announced in August 2022 lists action items on enhancing safety and security of riders that the agency is implementing through 2023. Some key items include:

Expand security guard deployments to strategic overnight locations and identify other security guard units to augment existing deployments and officer patrols.

Strengthen and expand partnerships with local police departments.

Track and communicate progress through monthly board meeting updates on Meeting the Moment Action Plan Key Performance Indicators.

Develop new ways to deter fare theft and prevent fare evasion before it leads to other illicit activity.

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## Metra

Advance a package of improvements at 13 Metra Electric stations over the next five years that will include safety improvements.

Conduct training with front-line staff to identify individuals experiencing a mental health crisis and continue to advance Operation Lifesaver.

In conjunction with CMAP and the counties of Northeastern Illinois, initiate a regional safety action plan with a focus on grade crossing safety to improve safety at the highest incident locations in the Metra system.

Install cameras at stations and complete installing cameras in cars and locomotives.

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## Pace

Improve investments in cameras (on board vehicle and at facilities); improved security for equipment at facilities.

Provide a list of proposed improvements with staff training.

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## CMAP

Provide technical assistance to local partners to improve safety, mobility, and connectivity through the Safe and Complete Streets program.

## What we as a region could do with more resources

With more funding, RTA and the Service Boards could add staff to be present at stations and on vehicles, to work with people, to observe safe riding norms, and compassionately deescalate safety situations before they become harmful. Additional resources from the state to social service agencies could help to address root causes that spill over into transit.



What are we doing about it?

**Metra's Operation Lifesaver program** is one of the agency's key outreach programs to educate the public about the importance of safety. Through the program, Metra **conducts about 1,000 free presentations across the region annually** for schoolchildren, school bus drivers, truck drivers, emergency responders, and other organizations.

Metra's safety team also conducts about 50 safety blitzes at stations throughout the system each year to help promote rail safety awareness and prevent fatalities and injuries. Metra also has developed internal training programs to better equip staff to deal with riders and members of the public who may be in crisis.

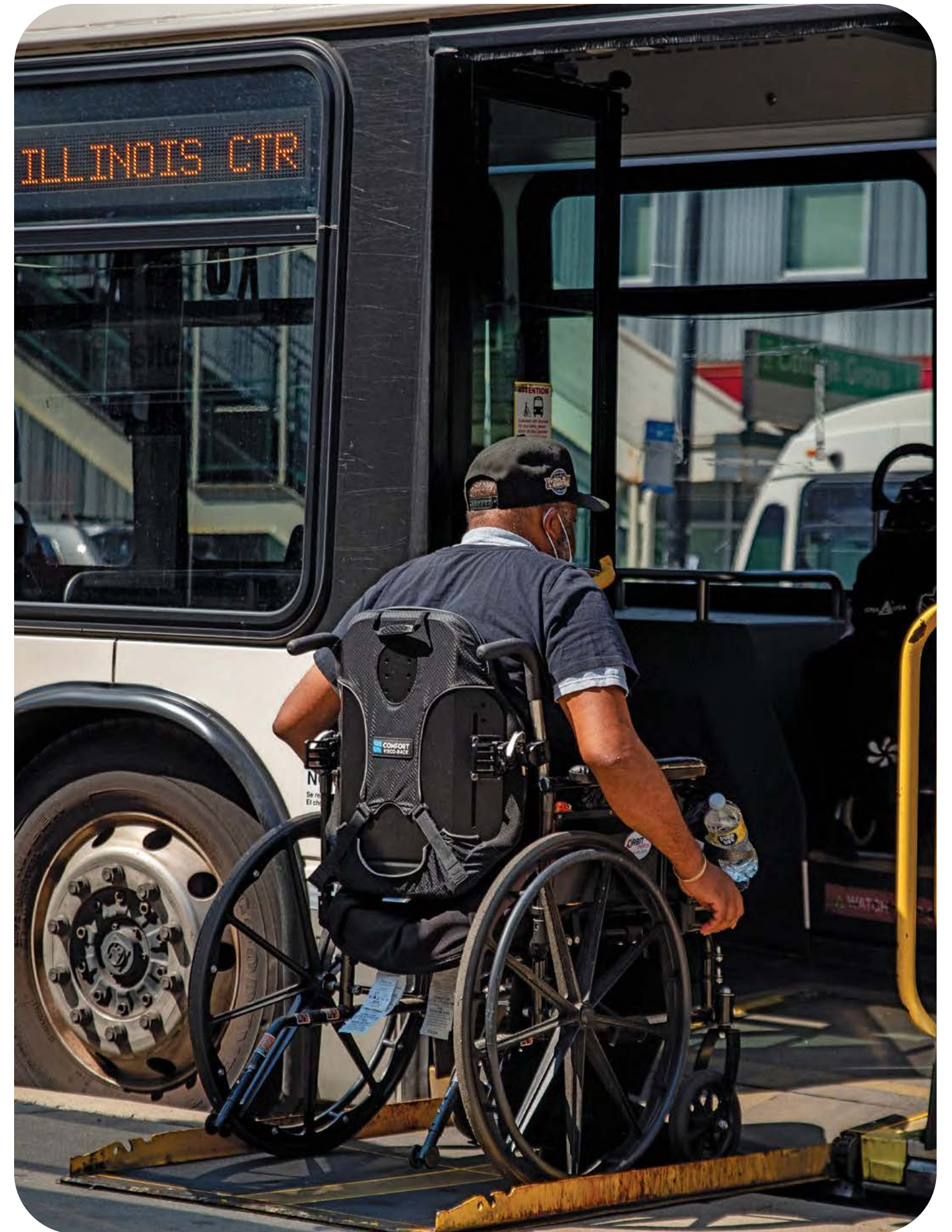


Action Item:

Use new funding as  
a catalyst to create  
a **fully accessible**  
transit system

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02



## Why this is important

All buses and trains on the region's transit system are already ADA accessible, but the stations and infrastructure around transit still may create barriers for some riders. The RTA and Service Boards will continue dedicating funding toward accessibility improvements and work with partners to create accessible connections to transit.

## Input on this topic from stakeholder working groups

Stakeholder working groups recommended establishing a dedicated funding source for capital projects addressing ADA improvements and guiding investments by expanding CTA's All Stations Accessibility Program with a regional accessibility plan. Working groups also suggested making paratransit services accessible to all, including those who cannot transfer from their mobility devices, and improving sidewalks, pedestrian crossings, and access to developments along bus corridors.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- CTA launched implementation of the All Stations Accessibility Program (ASAP). The ASAP plan details short- and long-term station accessibility projects, including a pathway to complete vertical accessibility of rail stations and upgrades of 160+ existing rail station elevators, as well as cost estimates and a proposed implementation schedule for these improvements. The plan also addressed additional accessibility elements.<sup>42</sup> A federal funding program for rail station accessibility was modeled on (and named for) these improvements.
- CTA began the installation of more than 1,300 tactile bus stop signs to make boarding locations easier to identify for riders who are blind or visually impaired (2022).<sup>43</sup>
- CDOT began upgrading more than 100 bus stops for accessibility improvements (2022).
- Pace has made several improvements in technology for paratransit services including routing software, customer communication and payment, and transfer locations funded by Rebuild Illinois (2020).<sup>44</sup>
- Between 2018-2022, Metra completed 22 station rehabilitation projects and made five stations ADA-accessible.
- In 2021, CMAP created an Accessibility and ADA-compliance program to help partners develop ADA Transition Plans and implement needed improvements. ADA Transition Plans include 'universal design' infrastructure that improves mobility and safety for pedestrians and other users in addition to those with disabilities.

## 2023 Activities to Support Action 2

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### Shared Activities

The agencies will work together to develop a regional accessibility improvement plan that builds upon existing Service Board plans and provides a comprehensive catalog of capital projects that prioritize investment and identifies funding sources to achieve full system accessibility within and across three Service Boards.

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### RTA

Lead development of plan described in Shared Activities

Continue to advance and monitor projects that are improving accessibility through the RTA's Access to Transit and 5310 funding programs.

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### CTA

Commence additional four rail station projects to improve accessibility.

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### Metra

Implement improvement projects at 13 Metra Electric District stations, with a focus on ADA accessibility.

Create two new fully accessible infill stations, Peterson/Ridge and Auburn Park.

Develop a station accessibility plan in 2023 to guide overall policy and program.

Continue roll-out of train tracker and elevator replacements across the system.

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### Pace

Implement Dempster Pulse station improvements to be fully accessible.

Sidewalk and shelter pad construction at non-Pulse stops.

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### CMAP

Advance ADA transition planning with local municipalities.

Coordinate IJA applications for projects tied to accessibility improvements.

Provide technical assistance for ADA transition plans in LTA projects.



### What we as a region could do with more resources

With more resources, the agencies could advance accessibility improvements more quickly such as CTA's All Stations Accessible Program, with an estimated total cost of \$2.1 billion to complete.<sup>45</sup> Local municipalities would also benefit from additional regional, state, and federal funding to help them invest in sidewalks, crosswalks, and other infrastructure improvements around their stations.



How is our region currently doing?

All of the region's bus and train fleets are accessible for people of differing abilities. **Currently 100 of 145 CTA Rail stations are fully accessible, and 185 of 242 Metra stations are fully accessible and an additional 13 stations are partially accessible.**



## Regional Riders

### Adam Ballard

Associate State Director for Advocacy  
and Outreach at Illinois AARP  
CTA bus and rail rider

“Transit means a lot to me, on a personal level, it makes, most of my life possible. I don’t drive and to be able to have a way to accessibly get around, has made it possible for me to have a career, a family, the life I have.”

“In the Chicago region, we actually have one of the more accessible transit systems, but there are still significant gaps. The infrastructure that surrounds transit is so important for people with mobility impairments like myself, because we have to have safe and complete sidewalk systems to get to the bus or train stop in the first place.”

“For example, years ago I was taking a suburban bus to a health appointment, and I just assumed that it would be a place that it would be safe to get off the bus, but I didn’t take into account that the sidewalk didn’t go all the way to the curb, as is the case in a lot of suburban places. This was an especially large gap and there was no way for the ramp on the bus to deploy all the way onto the sidewalk. And it came up short and when I came down the ramp my chair hit the side of the sidewalk and it pitched me out onto the sidewalk. I landed on both of my knees, and I broke them in multiple places immediately. It’s the worst pain I’ve ever felt. I had to go and do rehabilitation at a nursing home for several months, but I was a young parent with two kids at home. And my two-year-old and my six-month-old had to come visit me in a nursing home. Luckily, they were young enough that I don’t think they remember it, but I remember, and I’ll never forget.”

“I was also a young professional and it really took me longer to start my career than I wanted, but it also set my career off in the direction it has gone. Access benefits everyone. A fully accessible system wouldn’t make anything harder for anybody; it would make everything easier for everyone, not just me.”



Action Item:

# Provide more accurate, real-time travel information for riders

03

## Why this is important

Riders of fixed route and paratransit should have clear, accurate information about when and where their bus or train will arrive, regardless of schedule disruptions. While there are challenges to providing seamless information across three systems, several modes and a large region, RTA and the Service Boards are hearing feedback about information challenges and working continuously to make improvements.

Significant advances in technology have improved real-time information in recent years, however, the ways the transit system communicates with riders is not always as accessible and understandable as it should be. Additionally, the pandemic induced service disruptions have made service less reliable and the need for accurate information even more critical.

## Input on this topic from stakeholder working groups

Stakeholder working groups crafted specific strategies to make immediate improvements including developing on-board Metra communications displaying stops and exit instructions, improved station and platform signage and audio messaging for where to board, reviewing existing displays to ensure they can be read by as many riders as possible, and testing manual and automated audio announcement systems for sound quality.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- RTA has convened real-time information coordination calls for staff to exchange updates and ideas and coordinate.
- CTA launched a redesigned bus-tracker website and mobile application, improving customer access to arrival information and building the foundation for future upgrades to improve the accuracy and reliability of bus arrival information (2022).<sup>46</sup>
- Pace Pulse Milwaukee line stations now include real time bus displays and audio announcements.

## Shared Activities

The agencies will work together to commission an independent review of the accessibility and usability of rider communication, signage, and information-sharing across and between agencies.

## RTA

Lead review described in Shared Activities.

Continue to advance better rider information with more interagency signage and will work with Service Boards to pursue improvements to in-vehicle and at-station transfer announcements and real-time messaging.

## CTA

Upgrade bus tracker interface and improve on-board displays on newest 40-ft buses and electric buses.

Pilot a Chat with CTA or ChatBot feature to provide riders with more real-time information or ability to easily report quality of life issues to CTA.

Enhance tracking information in the Ventra App.

## Metra

Begin rollout of new station displays to support real-time train tracking.

Continue rollout of new train tracking system.

## Pace

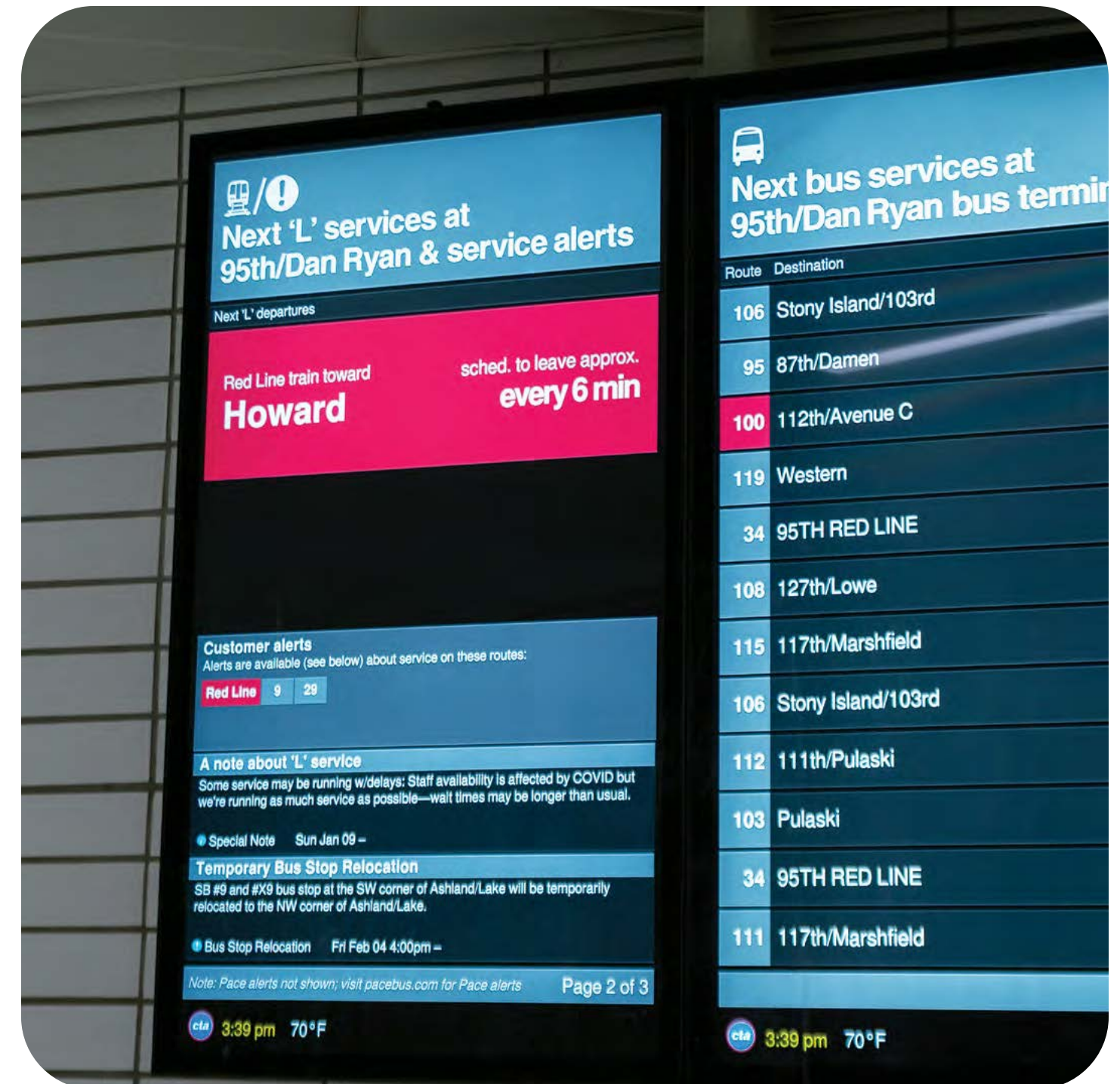
Implement Transit app Mobility as a Service (MaaS) two-year pilot.

Implement Pulse Dempster Line station information improvements.

Implement retrofitting displays for real-time information.

## What we as a region could do with more resources

With more resources, the agencies could update their central operating software and hardware on vehicles more frequently, which would make location reporting more robust and accurate. Additional digital signage could also be installed and improvements to the Ventra app could be made. Additional technical staffing at all agencies would also help advance projects more quickly.





### How are we doing currently?

The impacts of the pandemic on staffing have made providing service as scheduled challenging, which has had cascading impacts on the accuracy of real-time information across the system.

**Currently 96% of transit agencies across the U.S. are experiencing a workforce shortage, and 84% of those agencies have said the labor shortage is affecting their ability to provide service.**<sup>47</sup>

These circumstances have led to reduced satisfaction with real-time information — less than 75% of riders are satisfied with the accuracy of train and bus tracker products.<sup>48</sup>

**Action Item:**

# Make paying for transit more seamless and more affordable

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# 04

**Why this is important**

Riding CTA, Metra, and Pace, and transferring across systems should be as easy as possible. The Chicago region's transit system is operated by three separate Service Boards, but riders care most about a transit experience that easily gets them to where they need to go without complicating or confusing transfers. As the regional entity, RTA is committed to making transit more seamless. Making the system easier to ride will also encourage more people to take advantage of it rather than driving for trips.

A systemwide day pass or more discounted transfers could help remove barriers to travel. In addition, reducing fares for some could also help make transit more financially accessible. The RTA and the Service Boards offer reduced fare and ride free programs for seniors and riders with disabilities, and with additional long-term funding, can explore how to expand these programs to new populations including all people experiencing low incomes.

**Input on this topic from stakeholder working groups**

The stakeholder working groups pushed for explicit strategies to better integrate regional transit fares including: creation of a single-ride regional fare instrument, reducing or eliminating transfer fares to/from Metra service and another Service Board, and coordinating with public and private services addressing the first and last mile of transit trips. Additionally, the working groups pushed for expanding access to free or discounted fares to members of households experiencing low incomes and for further evaluating the equity implications of distance-based fares that reduce existing fares for shorter trips.

### Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- Cook County, Metra, and Pace began the Fair Transit South Cook pilot, offering reduced Metra fares in the study area and increased service levels on the Metra Electric and Rock Island lines and the Pace 352 bus route (2021).<sup>49</sup>
- Metra, CTA, and Pace launched the Regional Connect monthly pass, offering an integrated, unlimited, and affordable monthly fare product (2022).<sup>50</sup>
- CTA and Pace introduced Ventra Card for the Android, iPhone and Apple Watch allowing customers to tap to pay for rides via their personal smart device (2020).<sup>51</sup>
- Metra introduced new pass products to offer discounted and simplified fares for returning riders (2020/2022).
- Pace<sup>52</sup> and CTA's<sup>53</sup> Capital Programs include a coordinated procurement and installation of replacement fareboxes and related equipment improving bus efficiency and data reporting (2022).
- Pace approved the launch of a two-year Mobility as a Service (Maas) platform development to enhance accessibility to service through technology and improve flexibility when riding on multiple service providers (2022).<sup>54</sup>
- CMAP completed Equity in Transportation Fees, Fines, and Fares report to assess the impacts of fees, fines, and fares on residents with low income and recommend policy changes to improve equity (2021).<sup>55</sup>

### What we as a region could do with more resources

Additional resources would open the door to more seamless fare products, expanding existing discounted and ride free programs to include groups such as individuals from low-income households, youths, and students or even fare free transit service.

### 2023 Activities to Support Action 4

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## Shared Activities

The agencies will work together to identify funding to pilot an expanded regional free or reduced fare program available to people experiencing low incomes to make the system more affordable and advance understanding about the barriers that fares present to riders.

The agencies are participating in a joint effort led by Cook County in 2022-2023 to further analyze fare integration.

Metra and Pace will continue to participate in the Fair Transit South Cook fare pilot led by Cook County.

CTA and Pace continue to advance four integrated passes: 1-day, 3-day, 7-day, 30-day all of which include all bus and rail other than Pace premium routes, and eliminate Pace to Pace transfer fare. CTA previously eliminated CTA to CTA transfer fares.

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## RTA

Take a key role in pursuing funding for a pilot as described in Shared Activities.

Continue to administer existing free and reduced fare programs for seniors and people with disabilities enrolled in the Illinois Department on Aging's Benefit Access program.

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## CTA

Continue U-Pass with expanded flexibility for all colleges

Continue to advance Ventra 3.0 rollout that is planned for 2024/2025.

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## Metra

Continue to advance the Regional Connect pass product as an add-on for monthly pass customers.

Continue simplified and affordable fare products such as the \$100 Super-Saver Monthly Pass, and \$6 and \$10 Day Passes.

Begin installation of ticket vending machines, which could eventually accept Ventra payments and support transfer payments, system-wide.

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## Pace

Continue discounted Taxi Access Program (TAP) and DuPage Access programs.

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## CMAP

Study fare integration and fare subsidies.

## What are other regions doing?

Many transit agencies address equity and affordability goals by providing reduced fare options for riders experiencing low incomes, reducing their financial burden.

A 2021 study showed that 17 of the largest U.S. transit agencies offer such programs.<sup>56</sup> Typically, these agencies offer a 50% discount on fares for participants with incomes below a threshold of 125% to 200% of the federal poverty level. **Another study found that these types of discounts lead to significantly increased transit usage, particularly for health care and social service purposes.**<sup>57</sup> Developing, coordinating, and implementing these types of programs across multiple agencies would be complex, but other regions have worked to overcome similar challenges.

In the Seattle region, the ORCA Lift program offers riders experiencing low incomes reduced fares of \$1 on King County Metro and several other regional transit systems. Participants who earn less than 200% of the federal poverty level can enroll using the same network of more than 40 social service providers that helped people enroll in Affordable Care Act health insurance across the region.

In the San Francisco Bay Area, the Clipper START pilot program offers discounts of 20% or 50% for riders experiencing low incomes on 21 of the region's 27 transit agencies. The program was launched in 2020 after the completion of the Regional Means-Based Transit Fare Pricing Study in 2018. Participants with household incomes less than 200% of the federal poverty level can enroll through the Metropolitan Transportation Commission.





Action Item:

Accelerate the transition to a **zero emission regional transit system** and prioritize communities burdened by poor air quality

05



## Why this is important

CTA and Pace have committed to transition their bus fleets from fossil fuels by 2040, Metra is exploring clean technology as it becomes available, and there are steps the RTA and Service Boards can take in the short term to move those plans forward. Increased attention on the climate crisis and air quality issues have led to more scrutiny of transportation emissions in the Chicago region, throughout the United States, and across the world in recent years. Transit plays an instrumental role in advancing sustainability by reducing driving. While RTA analysis shows that emissions from transit vehicles make up less than 2% of total transportation emissions in the region, transit operators can cement their place as the anchors of a more sustainable network by electrifying. Other efforts to reduce single occupancy vehicle travel and to decrease the environmental footprint of transit are also important to advance, in consideration of plans with a local focus such as ON TO 2050 as well as those with a more international focus such as the United Nations Sustainable Development Goals.<sup>58</sup>

## Input on this topic from stakeholder working groups

While the past years have seen increased urgency in electrification of bus fleets, stakeholder working groups pushed for an even faster pace and improved coordination in adoption of green transit technologies including a target of eliminating of all fossil fuel transit and fleet vehicles by 2040. Working groups also envisioned improved planning efforts to fortify the regional network against climate and other disruptions including infrastructure emergencies and labor shortages. Lastly, working groups recommended establishing a funding or incentive program for the Service Boards and local communities to implement green infrastructure solutions in areas near transit.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- CTA released Charging Forward to inform the major decisions that comprise CTA's plan to fully electrify its bus fleet by 2040 including assessing equity and environmental justice impacts (2022).<sup>59</sup>
- Pace committed to a goal of 100% zero emissions fleet by 2040 to reduce its carbon footprint and improve the quality of our community's environment (2022).<sup>60</sup>
- Metra announced that it plans to convert six locomotives to battery electric demonstrating a commitment to innovation and cleaner energy (2022).<sup>61</sup>
- Pace purchased 20 Proterra ZX5 Electric Buses and EV Fleet Charging Infrastructure (2022).<sup>62</sup>
- Pace's 2023 Capital Program includes an additional \$60 million for electrification and expansion of North Division in Waukegan (2022).<sup>63</sup>

## 2023 Activities to Support Action 5

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### Shared Activities

Work together to develop a regional transit climate action plan that builds upon existing Service Board plans and identifies opportunities for transit to support the region's climate action goals, outlines regional strategies that will encourage more people to ride transit, and charts a course to reduce the footprint of the transit system and move toward zero-emissions for transit operations.

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### RTA

Lead the development of the climate action plan described in Shared Activities.

Work to grow regional transit mode share by continuing to expand the use of Transit Benefit programs across the region.

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### CTA

Continue to implement recommendations in Charging Forward, CTA's bus electrification strategic plan.

Advance electric bus deployment on the #66 Chicago Avenue route with additional electric buses and charging capacity.

Continue electrical load study to determine increased power requirements and electrical infrastructure needs for charging at bus garages.

Pursue additional funding for planning, design, and implementation of bus facilities improvements necessary to support charging infrastructure, electric bus operations, and electric bus maintenance.

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### Metra

Procure zero emission train sets of integrated locomotive and powered cars for shorter distance operations.

Procure Tier 4 and fully electric switch locomotives.

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### Pace

Complete its electric vehicle transition plan.

Continue procurement and delivery of electric vehicles for service testing.

Begin converting North Division garage in Waukegan to an electrified facility.

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### CMAA

Accelerate greenhouse gas planning efforts.

Opportunities for transit electrification through CMAA-administered funding programs.

### What we as a region could do with more resources

With more resources, the agencies could transition their fleets more quickly and more thoroughly. Replacing CTA's fleet of 1,800 diesel buses with electric buses by 2040 requires an estimated increase in capital funding of \$1.8 to \$3.1 billion over what would be needed to maintain the existing fleet and facilities to pay for the additional per vehicle purchase cost and the required charging and electrical infrastructure.<sup>64</sup>

In addition, more resources would allow for other updates to be made to make transit stations and facilities more energy-efficient. Finally, more resources would also allow the agencies to improve the physical resiliency of the systems to buffer the effects of climate change.



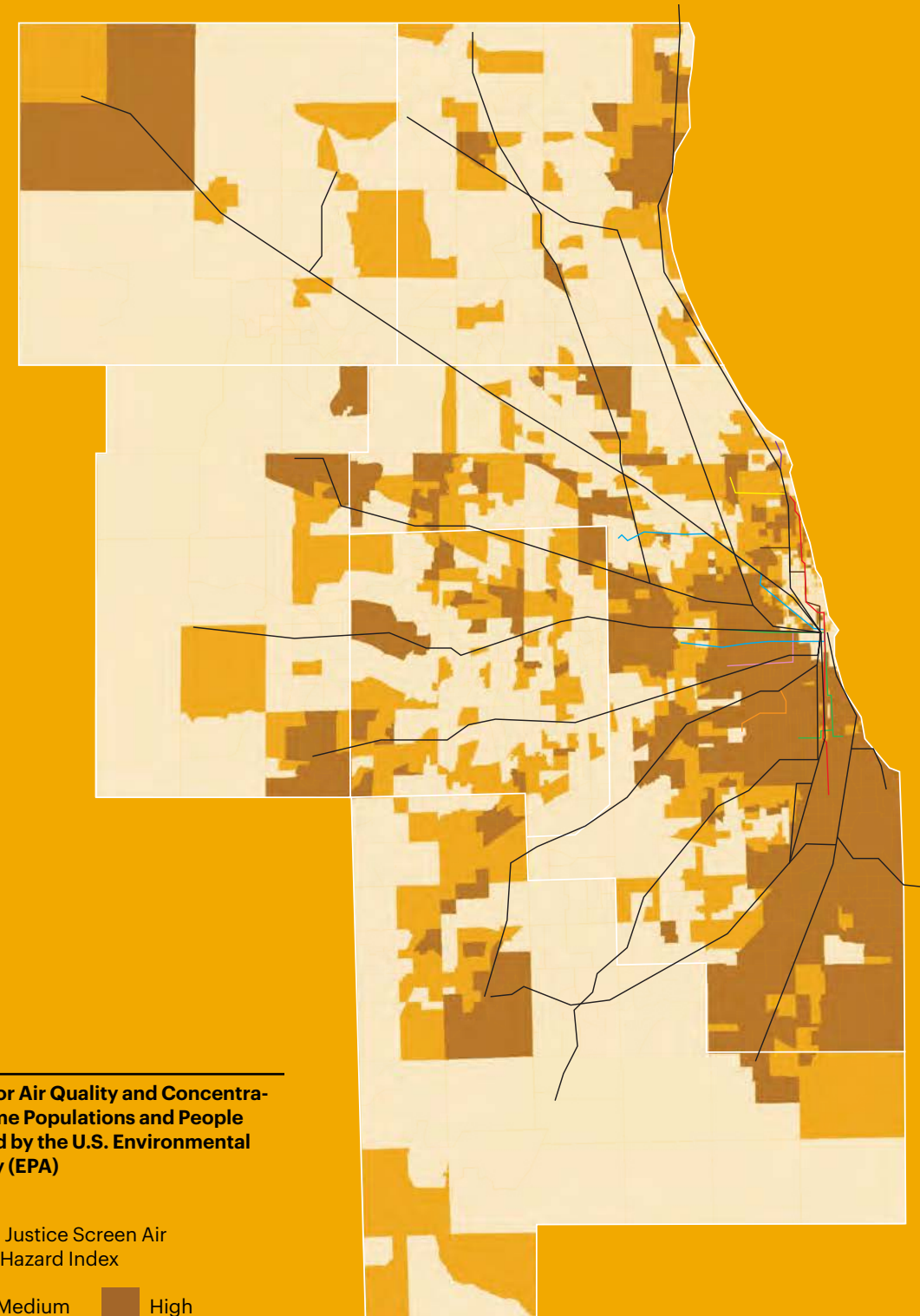
### Why is this important?

The impacts of air pollution from cars, trucks, and other sources are not distributed evenly across our region. People of color and populations experiencing low incomes are disproportionately exposed to higher levels of dangerous air pollution and suffer negative health outcomes as a result.<sup>65</sup>

Intersection of Poor Air Quality and Concentrations of Low-Income Populations and People of Color as Defined by the U.S. Environmental Protection Agency (EPA)

EPA Environmental Justice Screen Air Toxins Respiratory Hazard Index

Low Medium High





## Regional Riders

### Edith Makra

Director of Environmental Initiatives

Metropolitan Mayors Caucus

Metra UP-West rider

“My passion around sustainability has to do with, of course, the love of the natural world, but it’s about quality of life, resilience, and wellbeing of communities and the region. Transit is really important for all of this, to have a thriving environment, and for our ability to mitigate climate change.”

“Fundamentally, reducing vehicle miles traveled, or driving, will reduce greenhouse gas emissions. Transit also has a role to play in terms of the connectivity and resilience of communities. When you know your neighbors...and you have shared experiences of going somewhere together, that actually helps to foster a sense of community cohesion, which allows people to pull together and collaborate when we’re facing climate extremes.”

“Whether or not you’re a transit user, having a robust system makes the region stronger. That this is something that connects all people and makes all of our communities more economically healthy and viable. If our transit system does not get the funding it needs, the loss to the region could be profound. We cannot reach our climate goals without a robust transit system.”

“Electrification is really important, but that’s only a piece of it. The only way forward for us to meet our climate goals is to have this robust, reliable, safe, inviting, efficient, effective transit system. And I know that needs investment, but I think it’s one of the best climate investments we can make.”

“I wasn’t a transportation advocate before being in the [strategic plan] Working Group, but I am now. How many other people in the municipal world like me, could be activated to become better advocates for supporters and better understand the value of transit to our region?”

Action Item:

# Assess the regional capital program in a new way including considerations for racial equity and mobility justice

06

## Why this is important

For the last several years, the RTA and the Service Boards have been working together to articulate and advance a regional transit capital strategy. This moment is an opportunity to refresh the considerations that are made when projects are added to the 5-year regional capital program to better integrate with other regional planning processes, respond to legislative mandates, consider the input of stakeholders, and, most critically, address historical disinvestment in communities throughout the region.

## Input on this topic from stakeholder working groups

The stakeholder working groups pushed for the RTA and Service Boards to take a more regional approach in funding capital improvements that equitably prioritize communities of the greatest need through an increased and diverse staff with the inclusion of those communities directly in the decision-making process. Working groups pushed for investing in a complete transit experience while advancing state of good repair across the system. Working groups also stressed the importance of transparency in not just evaluating projects but in which projects are selected for inclusion in the capital program.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- RTA and the Service Boards established a first-ever for the region, performance-based formula for allocating federal and state PAYGO funds that, among other things, requires the agencies to program at least 20% of their capital dollars to projects focused on either equity or accessibility.<sup>66</sup> This was first applied in 2020 for the 2025 program year, which RTA will continue to monitor.
- RTA and the Service Boards developed the priority project list which is updated annually during the budgeting process, to articulate the large capital needs of the region, as well as what priorities the Service Boards are planning to advance in the coming years.
- CTA established a partnership with the Center for Neighborhood Technology (CNT) and TransitCenter<sup>67</sup> for the purpose of furthering CTA's equity work and established an internal equity working group — a permanent, ongoing committee that pursues equity outcomes, internally and externally (2021).
- CTA and the FTA published the Final Environmental Impact Statement (EIS) and Record of Decision (ROD) for the Red Line Extension, completing the National Environmental Policy Act (NEPA) EIS process and moving forward this critical equity investment in the south side of Chicago.
- A coalition of community groups formed Transportation Equity Network (TEN) to empower transportation advocates, local leadership, and others to work with decision-makers to embed racial equity and mobility justice into transportation decisions and investments (2021).

- Chicago's City Council approved \$10 million in earmarks for equitable transit-oriented development and the Chicago Department of Housing announced \$1 billion in planned affordable housing investments for 24 projects, of which 75% will be transit-oriented (2021).



## 2023 Activities to Support Action 6

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### Shared Activities

The agencies will work together to outline and apply the 12 new capital program evaluation measures recommended by the Priority Project working group — including equity, mobility justice, and other measures. The agencies have agreed that these will be applied during the annual budget process starting in 2023.

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### RTA

Evaluate the capital program across 12 measures recommended by the Priority Project working group — including equity and other measures — during the annual budget process starting in 2023 as described in the Shared Activities.

Utilize the new capital program dataset and evaluation measures to advance equity focused projects and identify existing gaps in investment.

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### CTA

Advance the Red Line Extension project through the federal New Starts funding program and the procurement process.

Provide information about 12 new capital program evaluation measures starting with the 2024 budget process that will commence in 2023.

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### Metra

Continue to advance equity geography as an element of investment prioritization.

Provide information about 12 new capital program evaluation measures starting with the 2024 budget process that will commence in 2023.

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### Pace

Provide information about 12 new capital program evaluation measures starting with the 2024 budget process that will commence in 2023.

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### CMAA

Identify and quantify the relationship between transit investments and community reinvestment.

Rethink the region's Regionally Significant Project evaluation process and better connect Economically Disconnected Area parameters with capital program measures used across all of the agencies and region.

### What we as a region could do with more resources

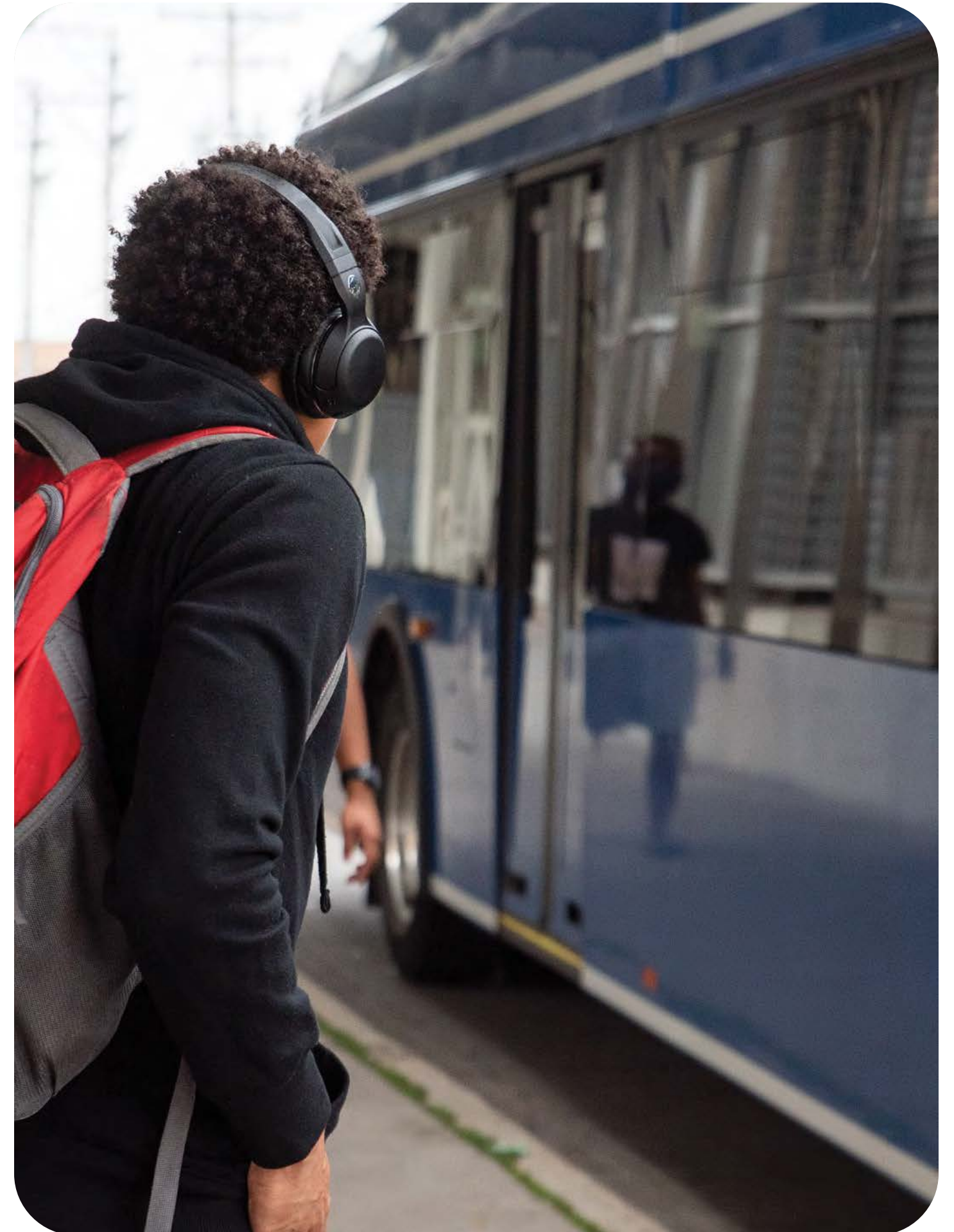
With more resources, the Service Boards could expand staff resources to improve asset management and evaluation strategies while undertaking more projects to replace and modernize transit infrastructure across the region.

### Peer Example: Virginia SMART SCALE

SMART SCALE is a process that helps Virginia meet its most critical transportation needs using limited tax dollars. It evaluates potential transportation projects based on key factors like how they improve safety, reduce congestion, increase accessibility, contribute to economic development, promote efficient land use, and affect the environment. The anticipated benefits are calculated, and the projects are scored and ranked. This information is used by the Commonwealth Transportation Board to help guide and inform their project selection decisions.

The overall process and metrics themselves are created with public and stakeholder feedback as well as results being publicly available. Public hearings are held once a draft Six-Year Improvement Program (SYIP) is published, and public and stakeholder feedback is solicited between SMART SCALE rounds for lessons learned.

The funding going through this program is a relatively small portion of total state transportation capital, but the process is intended to allocate the SMART SCALE funds — across modes and program areas — in a transparent, performance-based manner. All projects requesting SMART SCALE funding go through the same quantifiable and transparent prioritization process.



Action Item:

# Adapt bus and rail service to meet the changing needs of riders

07

## Why this action is important

Transit has been and continues to be a lifeline to many riders, but COVID-19 has also changed when, where, how, and why many residents use transit. Stakeholders have told us that transit needs to be more flexible and adapt to what is needed at this moment to connect more people to opportunity. Activities underway to advance changes to the transit network include the Pace Bus Redesign, Paratransit pilot projects, Metra exploration of regional rail, and CTA's Meeting the Moment Action Plan. Meanwhile all of the agencies are also experiencing significant operator shortages and hiring challenges, which is limiting their abilities to meet even current service needs let alone entertain further flexibility or adding service.

## Input on this action from stakeholder working groups

Stakeholder working groups proposed prioritizing access to opportunity over just ridership in understanding how the regional transit system may need to adapt to changing and unmet needs of riders and communities. This includes focusing on improving service frequency and reliability particularly in low-income neighborhoods, suburbs, and communities with a demonstrated transit need and in the hours outside of traditional peak service. Working groups also recommended development of regional service standards and policies to guide how service is distributed across the region.

## Highlighted accomplishments related to this action that have been completed since adoption of Invest in Transit

- RTA led the region's first pilots with new mobility providers. These included last-mile services from Metra to suburban office parks in Oak Brook and Bannockburn, and a mobility-as-a-service application and variety of offerings in Bedford Park.<sup>68, 69</sup> All of these pilots allowed the agencies and partners to test connecting options for transit and make observations useful to future evolutions of these activities.
- CTA released the customer-focused "Meeting the Moment: Transforming CTA's Post-Pandemic Future" action plan for its system that includes strategic initiatives designed to immediately respond to riders' most pressing challenges (2022).<sup>70</sup>
- CTA reinstated express service on the Cottage Grove bus route to help meet ridership demand (2022).<sup>71</sup>
- CTA made permanent pilots of the #157 and #31 bus route extensions and partnered with CDOT on pop-up bus lanes experiments during COVID.
- Metra piloted reverse commute service to Lake Cook Road on Milwaukee District North with a funding partnership with Lake County Partners, an economic development corporation affiliated with Lake County businesses and governments.<sup>72</sup>



- Metra adopted service principles, which have guided schedule updates since 2021, with a focus on restoring service, establishing memorable service patterns, and providing consistent and frequent service throughout the day.<sup>73</sup>
- Pace opened its first Pulse line on Milwaukee Avenue, offering fast and reliable services that combines transit signal priority technology and limited-stop service with raised platforms at stations to reduce travel times and provide enhanced rider amenities.<sup>74</sup>
- Pace began work on its second Pulse line, operating on Dempster Ave and connecting Evanston to O’Hare Airport.<sup>75</sup>
- Pace has grown the Taxi Access Program through fare incentives to provide more flexible mobility to customers and preserve reliability on the Pace served system.<sup>76</sup>
- Pace partnered with DuPage County to pilot using Transportation Network Company vehicles to supplement the agency fleet and offer real-time trip booking to customers.
- Pace launched a pilot of its new VanGo program, a reservation-based service in which drivers and riders reserve a van for the next business day.
- RTA and Pace completed an ADA Innovation Study and Action Plan for implementation to provide improved mobility options for customers while controlling cost growth.<sup>77</sup>

#### **What we as a region could do with more resources**

There is a major transit funding crisis looming, but if more resources are available beyond the “budget gap,” the agencies could provide additional service across the region and continue to develop new service models identified in Metra’s vision of regional rail service, CTA’s Meeting the Moment Action Plan, and Pace’s Network Revitalization & Service Restructuring priority initiative.

## **2023 Activities to Support Action 7**

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### Shared Activities

Begin development of a transit-friendly communities plan, based on RTA’s Setting the Stage for Transit report, that will set standards for communities that host transit services and hold them accountable for land-use decisions and access to transit to ensure that our riders can travel safely and efficiently.

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### RTA

Update RTA Transit Access Index to equitably assess access to opportunity across disaggregate population groups throughout the region.

Procure new datasets and tools to conduct market analysis that captures changing and unmet travel needs.

Conduct panel surveys to continually gain public input on how demand for travel and customer experience are changing across the regional transit system.

Continue exploring new and strengthening existing microtransit and shared mobility programs in order to improve first and last mile connections and overall access to transportation.

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### CTA

Continue to advance service optimization described in Meeting the Moment Action Plan.

Continue to develop the Better Streets for Buses Plan to improve street infrastructure for public bus service and lay the groundwork for ongoing bus infrastructure improvements.

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### Metra

Begin evolution towards regional rail style service as outlined in “My Metra, Our Future” Strategic Plan.

Conduct a route restoration study to optimize returning service.

Conduct a system wide network plan assessing travel market demand and including: public engagement, ridership modeling, capital cost analysis, operation simulation.

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### Pace

Begin network revitalization and restructuring as envisioned in the “Driving Innovation” Strategic Plan.

Implement short-term plans for innovative service throughout the region as possible given labor constraints.

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### CMAP

CMAP will model visionary transit adaptation at regional scale.



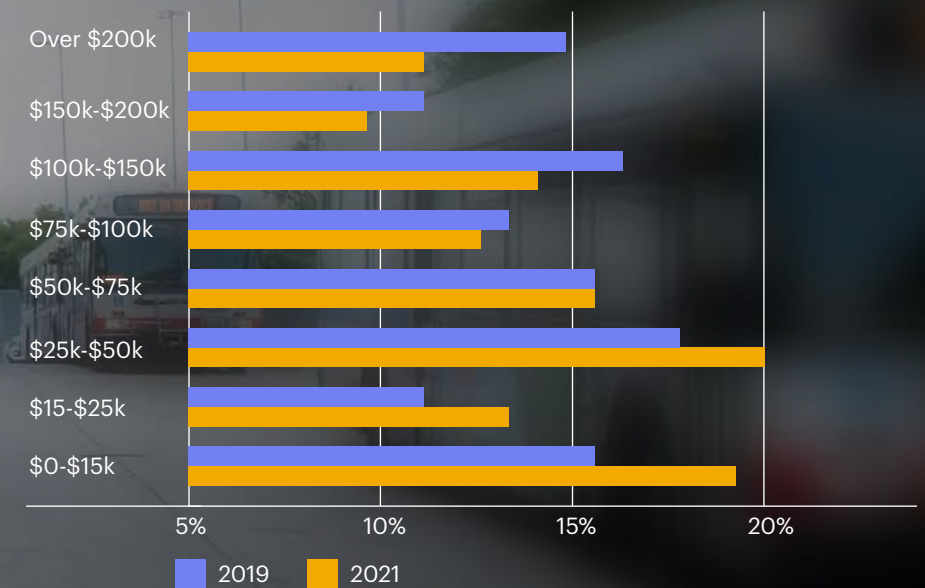
## What has changed across the region?

Who, when, where, and why people ride transit around the region changed significantly during the pandemic. The share of trips occurring during the morning and evening rush hours has decreased while the share of ridership occurring at most other times of day has grown.

Prior to the pandemic, 39% of transit riders across the region came from households with incomes under \$50,000. That share had grown to 50% as of 2021, underscoring the importance of transit service for the region's essential workers and for workers who have no other options besides transit to travel to their jobs.

2021 also saw changes in what people are accessing via transit, with increases in retail and healthcare and declines in offices accessed via transit.<sup>78</sup>

Figure 10: Distribution of Household Incomes of Transit Riders in 2019 and 2021, Replica 2022



## Regional Riders

### Francine & Aubryana Bensinger

Waukegan residents

Metra UP-North riders

“I’m from Waukegan, but I worked in Evanston. I would take the train and I loved it because I didn’t have to worry about driving in the snow and it is a nice hour when you can relax. Now we use transit to take trips around Chicago and it’s great to have another option to be able to explore the city.”

**Francine Bensinger**

“I love trains. I think it started when I was really little, and I liked watching Thomas and Friends. Now I love to draw trains and learn about how they work. As I get older, I will keep riding transit to explore more places, try new things, and go places I have never been before.”

**Aubryana Bensinger, 16**



# Measuring Progress

The RTA is confident that the shared vision, principles, and Agenda for Advocacy and Action will avert a transit system crisis and move the region in a positive direction. Early in the plan process, RTA also worked with stakeholders to develop six outcomes that we are aiming to achieve for the transit system and for the type of region a great transit system can help build. The three principles of equity, committed to change, and stewardship, apply to each of the outcomes we aim to achieve.

The outcomes include:

## In the future our region's transit system will be...

- In a state of good repair
- Financially stable
- Safe, accessible, reliable, and useful for riders

## In the future our region will be...

- Connected
- Winning the fight against climate change
- Thriving

Now is the time for the RTA, the Service Boards, and the region's many stakeholders to act on this plan and to help make these outcomes a reality. We know that accountability along the way will be important.

Tracking and reporting on our regional transit system's performance is one of RTA's core functions. RTA constantly evaluates the impact and effectiveness of the system and shares information to increase transparency and accountability.

New strategic performance measures will help guide regional investments and resource allocation, create data-driven feedback loops between implementation and future decision making, and highlight initiatives where course corrections may be needed. RTA is also committed to tracking strategic performance measures at a detailed, nuanced level to understand how outcomes may vary across communities, by race, by income, or other important factors.

The strategic performance measures included in this plan are organized around the six key outcomes as shown below.



# OUR FUTURE TRANSIT SYSTEM

These measures capture user experience, progress made in investing-in and maintaining transit infrastructure, and how well RTA and the Service Boards are maximizing use of our shared resources. When possible, these measures will be tracked both in aggregate and across different demographic, geographic, and rider groups in order to measure equity and improve equity outcomes.

## A state of good repair



- **Miles between major mechanical failures** — The total and average miles travelled between major mechanical failures to transit vehicles. The more miles between mechanical failures means fewer delays and improved service reliability.
- **Annual capital funding** — The annual amount dedicated to funding expenses related to the purchase, improvement, or maintenance of capital equipment and financing capital projects. The 2022-2026 Capital Program totals \$5.26 billion. Recent major influxes in capital funding from state and federal infrastructure bills have led to many long-needed projects being built in the Chicago region, but a long-term sustainable funding solution is needed to keep transit in a state of good repair today and for the next generation.
- **Percentage of assets within useful life benchmark** — The percent of assets (e.g., vehicles, buildings, passenger stations and fixed guideway facilities) that are within their useful life — the expected lifetime of property, or the acceptable period of use in service. Ideally, transit assets are replaced before the end of their useful life.
- **Capital expenditures** — The funds used for the purchase, improvement, or maintenance of transit assets and capital projects. Modernizing and improving transit facilities with capital expenditures can ensure those facilities are safe, accessible and in a state of good repair for all passengers and future passengers.
- **Inventory of ADA accessible and non-compliant facilities, including percent of time unavailable for accessibility elements** — The amount of transit facilities that are compliant and non-compliant with ADA accessibility standards. All facilities and vehicles must meet ADA accessibility standards and ensure no one is denied transportation based on physical ability.
- **Share of capital spending in equity areas** — The share of capital funding invested in equity areas compared to the rest of the region. Investments in equity areas can connect historically disadvantaged and underserved communities to jobs and opportunity, support climate justice and ensure everyone benefits from a robust transportation system.
- **Backlog of investment needs** — The list of transit amenities, vehicles, supplies and materials that are in need of investment, including those assets exceeding their useful life. The backlog of investment needs can inform which assets an agency should prioritize spending capital funds on. For example, the CTA has identified a total of \$29 billion in long-term capital project needs.

## Financially stable



- **Non-farebox operating revenue** — The revenue accrued by the Service Boards other than the revenue accrued through customer farebox payments. With the impacts of the COVID-19 pandemic transit agencies are increasingly leaning on ancillary revenue such as the lease of space, advertising, and investment income, to support operating budgets.
- **Operating cost per unit of service** — The amount a service board spends to offer a specific amount of transit service (per hour, week, month, etc.) Operating cost per unit of service can demonstrate how far a transit agency's operating dollar is going, per hour, week, or year.
- **Fare revenue per passenger trip** — Represents the average fare collected by the Service Boards per trip, including discounted fares for select populations.
- **Regional and Service Board farebox recovery ratios as published in the National Transit Database (NTD)** — The fraction of regional and service board operating expenses which are met by passenger fares.

## Safe, accessible, reliable, and useful for riders



- **Safety/security incidents per 1 million trips** — The number of reportable safety and security incidents that occur on transit vehicles and at transit facilities per 1 million passenger trips taken. Lowering safety and security incidents is paramount to the rider experience and to encouraging ridership.
- **On-time performance** — The percent of all transit trips that are on-time, late, and early. Riders expect to get to their destinations on time. Maintaining on time performance decreases delays and ensures riders can predict and plan their trips.
- **The ratio of operated service to scheduled service** — The share of scheduled transit trips that are actually delivered.
- **Average transit vehicle speed** — The average measurement of distance traveled normalized by the time it takes a transit vehicle to travel from one point to another. Average speeds impact safety, traffic flow, congestion, schedules, service reliability and more.
- **Ridership** — The total boardings throughout the system. Ridership is dependent on numerous factors, including access, affordability and reliability.
- **Customer satisfaction** — The degree to which transit customers are satisfied or dissatisfied with transit service. Customer satisfaction encompasses numerous factors, such as speed and reliability, quality and accessibility of information, transit amenities, and safety.
- **Vehicle revenue hours per passenger or per capita** — The total revenue hours (time a transit vehicle is available to the general public) per passenger or person within the service area. Revenue hours per passenger or per capita is a useful metric in measuring a transit agency's service operability compared to its ridership.
- **Percentage of regional residents within walking distance of all-day, frequent transit** — The percent of residents living within walking distance (usually 1/4 mile) of all-day, frequent transit service. A higher percentage of the population living near frequent, quality transit will significantly improve access to opportunity and accessibility throughout the region.
- **Number of passenger transfers between Service Boards** — The number of passenger transfers between one service board to another (e.g., taking a Pace bus to 'L' train or Metra Rail to CTA bus).

# OUR FUTURE REGION

These measures capture how the transit system connects people to opportunities like jobs and health-care, how transit is used as a tool for climate action, and how transit fosters communities throughout the region to thrive. When possible, these measures will be tracked both in aggregate and across different demographic, geographic, and rider groups in order to measure equity and improve equity outcomes.

## Connected



- **The number of jobs/services within 30/60 minutes via transit vs. driving** — The number of jobs and other important services (such as healthcare, schools, and grocery stores) reachable within 30 and 60-minutes by transit, versus driving. Improving the number of jobs and services accessible via transit connects people to opportunities and daily needs.
- **Regional miles of dedicated bus lanes** — The total miles of dedicated bus lanes (street space that is exclusive to transit vehicles) in the system. More miles of dedicated bus lanes means more high-quality and reliable transportation to more people that need it.
- **Transit travel time competitiveness to auto** — The average time it takes to get to a destination on public transit versus driving a personal vehicle. If the time it takes to reach your destination on public transit is less than on other modes, people will likely opt to use it for its convenience.
- **Total area of access measured in travel time** — Measure of how far you can travel via transit within 30 and 60 minutes.
- **Residential density within 1/2 mile of transit** — The number of dwelling units per area (e.g., acre) within 1/2 mile of transit facilities.
- **Passenger trips per capita** — The average number of transit trips that people living within the service area take.

## Winning the fight against climate change



- **Regional greenhouse gas emissions from on-road and rail transportation** — Total amount of greenhouse gas emissions across the region from on-road sources (i.e., transit buses, trucks, and cars) and rail (i.e., passenger and freight rail).
- **Regional transit system emissions** — Total amount of greenhouse gas emissions attributed to the regional transit system, including direct, indirect, and upstream emissions from vehicle travel and transit operations.
- **Tons of CO2 per passenger mile traveled** — Greenhouse gas emissions (measured as tons of carbon dioxide equivalents) from transit normalized by the number of passenger miles traveled on transit.
- **Regional vehicle miles traveled** — Measure of driving (including personal trips and freight delivery) across the region. Shifting more trips from driving to transit can help reduce vehicle miles traveled and associated emissions.
- **Regional transit mode share of fleets that are zero-emission** — Percentage of the regional transit fleet made up of zero-emissions vehicles. Increasing the number of zero-emissions vehicles will help decrease greenhouse gas emissions from the transit system.
- **Tons of CO2 off set by low emissions vehicles** — Measure quantifying the amount of greenhouse gas emissions avoided by switching to zero and low emissions vehicles compared to conventional vehicles.
- **Tons of CO2 off set by mode choice** — Measure quantifying the amount of greenhouse gas emissions avoided by the use of transit vs. driving alone.
- **Percentage of regional employers offering transit benefits** — The percent of employers in the region that offer transit benefits (e.g., RTA Transit Benefit Fare Program and other transit subsidies) to their employees.

## Thriving



- **Share of new building and affordable housing permits within 1/2 mile of quality transit** — The percent of issued building permits and new affordable housing units that are within 1/2 mile of 15-minute or less transit service.
- **Share of population and jobs within 1/2 mile of quality transit** — The percent of population and jobs that are within 1/2 mile of 15-minute or less transit service. A higher concentration of jobs and residents within a 1/2 mile of frequent transit means expanded opportunity access and more opportunity for transit-oriented development, or TOD, to serve those populations.
- **The percentage of household income spent on transit and overall transportation costs** — The percent of a typical household's income that is spent on transit and transportation costs annually. American households in the lowest income quintile spend the least on transportation but face a larger transportation cost burden, spending 27% of their income on transportation compared to 10% by the highest income quintile in 2021.

# Stay Engaged

Transit is the Answer to many of the region's challenges but is threatened by lack of sufficient operating and capital funding after years of disinvestment and a pandemic. Our region's current transit funding structure is also overly reliant on fares. Together this leaves our transit agencies to face an existential crisis that neither fare hikes nor service cuts can solve while preserving a useful and equitable system. We need your help to win sustainable funding for transit and build a better system for everyone who relies on it. The Agenda for Advocacy and Action in this plan lays out a path to position the system for long-term success by seeking new funding, making improvements for riders, and supporting communities working to increase transit access.

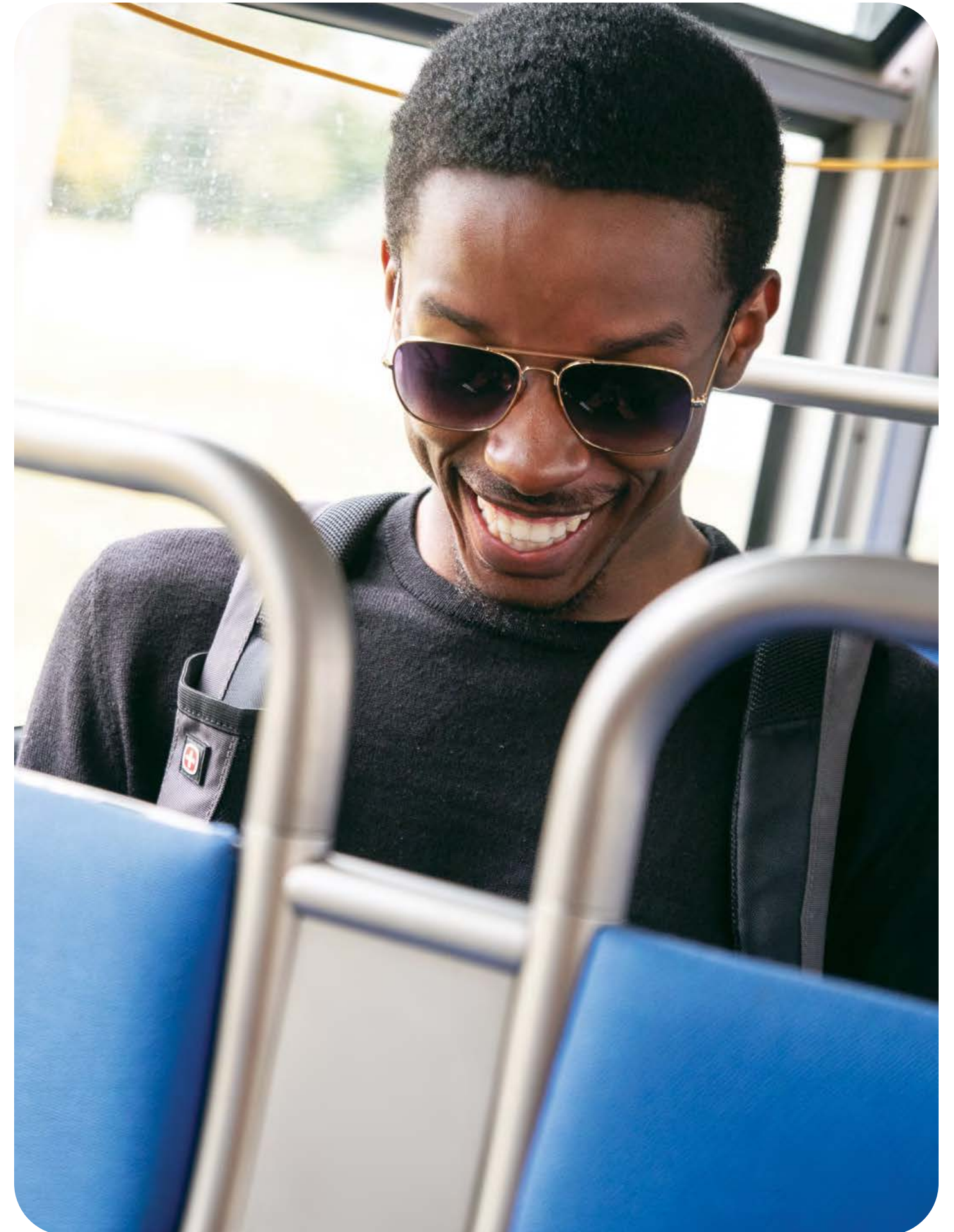
We recognize we can't do this alone. Many of the advocacy and action items in this plan are not under the control of RTA, CTA, Metra, and Pace. Leadership from a diverse group of elected officials and community leaders is needed to achieve meaningful change.

**Take action to advance this agenda, save transit, and improve it for the future.**

**Organizations:** Join our [Transit is the Answer Coalition](#).

**Individuals:** Sign up for RTA communications and follow RTA on social media to receive regular updates on the coalition and progress on the plan actions.

**Do both by visiting [www.rtachicago.org](http://www.rtachicago.org).**



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## Related Documents

### Technical Documents

- [10-Year Financial Plan Working Group Memo](#)
- [Capital Priority Projects Working Group Memo](#)
- [Chicago Regional Transit System Sketch Economic Impact Analysis](#)

### Stakeholder Engagement

- [Working Group Hub](#)

### Stakeholder Working Group Briefing Booklets

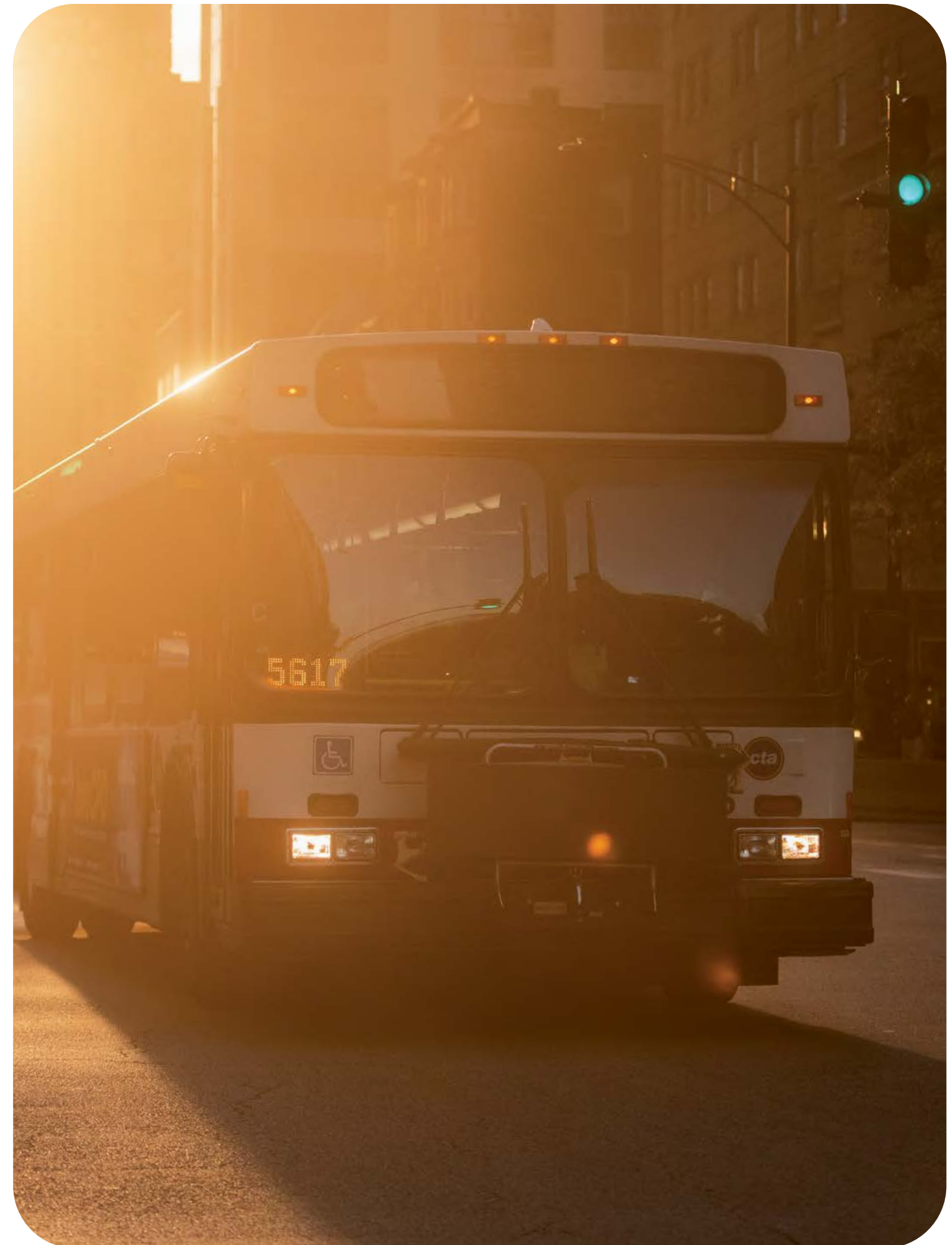
- [Transit Service](#)
- [Infrastructure Investment](#)
- [Financial Responsibility](#)

### Stakeholder Working Group Memos

- [Transit Service](#)
- [Infrastructure Investment](#)
- [Financial Responsibility](#)
- [Stakeholder Process & Engagement Summary Document](#)

### RTA Board Updates

- [Strategic Plan Workshop. August 19, 2021.](#)
- [What We've Heard: A focus on outcomes will drive the next regional transit strategic plan. February 10, 2022.](#)
- [Strategic Plan Update. August 18, 2022.](#)
- [Strategic Plan Update. October 20, 2022.](#)
- [Strategic Plan Update. December 15, 2022.](#)



The Regional Transportation Authority (RTA) is the unit of local government created to oversee finances, secure funding, and to conduct transit planning for the Chicago Transit Authority (CTA), Metra, and Pace. The RTA also issues Reduced Fare and Ride Free permits, assesses eligibility for ADA Paratransit service, and oversees specialized travel training for people with disabilities and older adults. We service the Northeast Illinois counties of Cook, DuPage, Kane, Lake, McHenry, and Will.

February 2023



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