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OVERVIEW OF APPROACH

The Beyond Boston study was primarily a policy study; therefore, the study team and MassDOT adopted a civic engagement plan that identified key stakeholders and developed an approach for including their input and experiences. The approach included in-depth interviews; regular meetings with an Advisory Committee; and use of a database and website to share data, files and study products. Interested members of the general public also had access to the Beyond Boston study and were invited to attend the Advisory Committee meetings and had access to all study material through the project website.

Regional Transit Authority (RTA) Management: All RTA Administrators and several staff members participated in the Beyond Boston study. The study team met with each Administrator individually at the RTA offices. In addition to the six Administrators who were members of the Advisory Committee, many other RTA Administrators participated in the Committee's meetings. In addition, MassDOT held regular conference calls with interested RTA Administrators to discuss issues, findings and study products. RTA staff members provided information for the RTA profiles and commented in detail on the proposed initiatives.

Transit Stakeholder Groups and Underserved Populations: Several stakeholder groups, including representatives of organizations that work with traditionally underserved populations were interviewed as part of the Beyond Boston Study. A subset of these stakeholders also participated in the Advisory Committee. A full list of all individuals interviewed as part of this process is included in subsequent sections. The group included organizations representing human service agencies; service to low income and non-English speaking communities in southeastern MA; and statewide rider groups, among others. These interviews informed several aspects of the project, including recommendations around Service Planning and Public Information.

The study team also consulted and incorporated data and findings associated with other ongoing MassDOT initiatives, including:

- MassDOT's work with the Southeastern Regional Transit Authority (SRTA) to develop a Transit Demand Plan that included on-board surveys and phone interviews with riders and non-riders.
- MassDOT's outreach to customers as part of the weMove Massachusetts project.

General Public, Project Database and Website: As part of the Beyond Boston study, MassDOT invited interested stakeholders to join a database to receive information about the project. The agency also posted Advisory Committee agendas, meeting summaries and presentations on a project website (<http://www.massdot.state.ma.us/planning/BeyondBostonTransitStudy.aspx>). All study products, interim technical memos and the final report were also posted on the project website and the availability of the report was announced to the project database and the media. MassDOT will share the recommendations with legislators who represent the RTA districts.



STAKEHOLDER OUTREACH

Civic and Stakeholder Engagement

The study team met with each of the 15 RTA Administrators as well as several stakeholders to understand the existing network of RTA services and to assess the major issues affecting RTA service delivery. Each RTA Administrator was interviewed in person at his or her agency offices. Non-RTA stakeholder interviews were also largely conducted in person and at the stakeholders' offices. In all cases interviews were held as confidential discussions to ensure interviewees were able to speak freely.

Interview guides for both the RTA Administrators and RTA stakeholders are included in this section. Summaries of the interview findings were presented to the Advisory Committee and are included in the meeting materials (see below). Interviews were conducted with the following individuals and organizations:

RTA Administrators

- Tom Cahir, Cape Cod Regional Transit Authority (CCRTA)
- Ed Carr, MetroWest Regional Transit Authority (MWRTA)
- Joe Castanza, Merrimack Valley Regional Transit Authority (MVRTA)
- Tina Cole, Franklin Regional Transit Authority (FRTA)
- Frank Gay, Greater Attleboro Taunton Transit Authority (GATRA)
- Angela Grant, Martha's Vineyard Transit Authority (VTA)
- Mo Kahn, Montachusett Regional Transit Authority (MART)
- Paula Leary, Nantucket Regional Transit Authority (NRTA)
- Ray LeDoux, Brockton Area Transit Authority (BAT)
- Ray LeDoux¹⁷, Southeastern Regional Transit Authority (SRTA)
- Mary MacInnes, Pioneer Valley Transit Authority (PVRTA)
- Stephen O'Neil, Worcester Regional Transit Authority (WRTA)
- Jim Scanlan, Lowell Regional Transit Authority (LRTA)
- Gary Shepard, Berkshire Regional Transit Authority (BRTA)
- Paul Talbot, Cape Ann Regional Transit Authority (CATA)

RTA Stakeholders

- Carolyn Brennan, East Longmeadow Council on Aging
- Tom Narrigan and David Lee, First Transit
- Charles Planck, MBTA
- Richard O'Flaherty, ATU Brockton Local 1547
- Brian Pastori, Spokesperson for Bus Riders United and CEDC of Southeastern MA
- Lizzi Weyant, MassPIRG
- Jim Flanagan and Tanja Ryden, Human Services Transportation Office
- Mary Ellen Blunt, Central Massachusetts Regional Planning Commission
- John Lozada and Heather Hamilton, MassDOT Office of Civil Rights

¹⁷ Ray LeDoux was Acting RTA Administrator at the beginning of the Beyond Boston study.



ADVISORY COMMITTEE

As part of the Beyond Boston study, MassDOT invited stakeholders to join a Study Advisory Committee. The intent of the Advisory Committee was to form a group of involved stakeholders to oversee the study process and provide input into the process, findings and recommendations. Participants were active and engaged and the Advisory Committee ultimately played a vital role in the project outcome and recommendations.

Advisory Committee Participants

In total 11 stakeholders and 6 six representatives from MassDOT participated in the Advisory Committee. The meetings were held as open meetings; thus members of the public were invited to attend. Participation in the agenda discussions was limited to the Advisory Committee. However, members of the public were allocated a comment period at the end of the discussion at every meeting.

Advisory Committee Members

- Mary Ellen Blunt, Central Massachusetts Regional Planning Commission
- Carolyn Brennan, East Longmeadow Council on Aging
- Frank Gay, Greater Attleboro Taunton Regional Transit Authority
- Angela Grant, Martha's Vineyard Transit Authority
- Ray LeDoux, Brockton Area Transit Authority
- Mary MacInnes, Pioneer Valley Transit Authority
- Tom Narrigan, First Transit
- Richard O'Flaherty, ATU Brockton Local 1547
- Stephen O'Neil, Worcester Regional Transit Authority
- Tanja Ryden, Executive Office of Health and Human Services
- James Scanlan, Lowell Regional Transit Authority

MassDOT Representatives

- Scott Hamwey, MassDOT, Office of Transportation Planning
- Matt Ciborowski, MassDOT, Office of Transportation Planning
- Kyle Emge, MassDOT, Rail and Transit Division
- John Englert, MassDOT, Rail and Transit Division
- John Lozada, MassDOT, Office of Civil Rights
- Charles Planck, MBTA

Advisory Committee Meetings

Beginning in October 2011, the Advisory Committee met eight times over the nine-month study period. Except for the first meeting, which was held in the State Transportation Building in downtown Boston, the Advisory Committee met at the Central Massachusetts Regional Planning Commission (CMRPC) offices at Union Station in Worcester. Prior to every meeting, the meeting date, time and location were posted on the project website. Within ten business days after the meeting, a meeting summary that documented meeting deliberations was also posted to the project website. Copies of the meeting agendas, materials and meeting summaries are included in the following section. Advisory Committee meeting dates and a summary of the major topics discussed



are listed below. All Advisory Committee meeting agendas, presentations, and minutes are located in the Appendix.

October 14, 2011

Project Overview, Outline of Activities
Schedule for Interviews and Site Visits

November 14, 2011

Discussion of Transit Visions and Project Goals
Major Issues Identified in Interviews

December 19, 2011

Results of Non-RTA Interviews
Updated Vision and Goals Statement
Preliminary Evaluation of Funding Issues

February 10, 2012

Overview of Proposed Initiatives
Breakout Sessions to discuss Initiatives:

1. Develop and Use Service Guidelines
2. Improve Service Planning
3. Improve Capital Planning

March 27, 2012

Breakout Sessions to discuss Initiatives:

1. Develop Consistent Data and Reporting
2. Enhance Public Information
3. Foster “Cross-Border” Collaboration
4. Better MassDOT/RTA Collaboration

April 11, 2012

Breakout Sessions to discuss Initiatives:

1. Improve Contracting
2. Identify Additional Revenue
3. Develop More Effective Funding Process

May 24, 2012

Discussion of Proposed Draft Recommendations

June 14, 2012

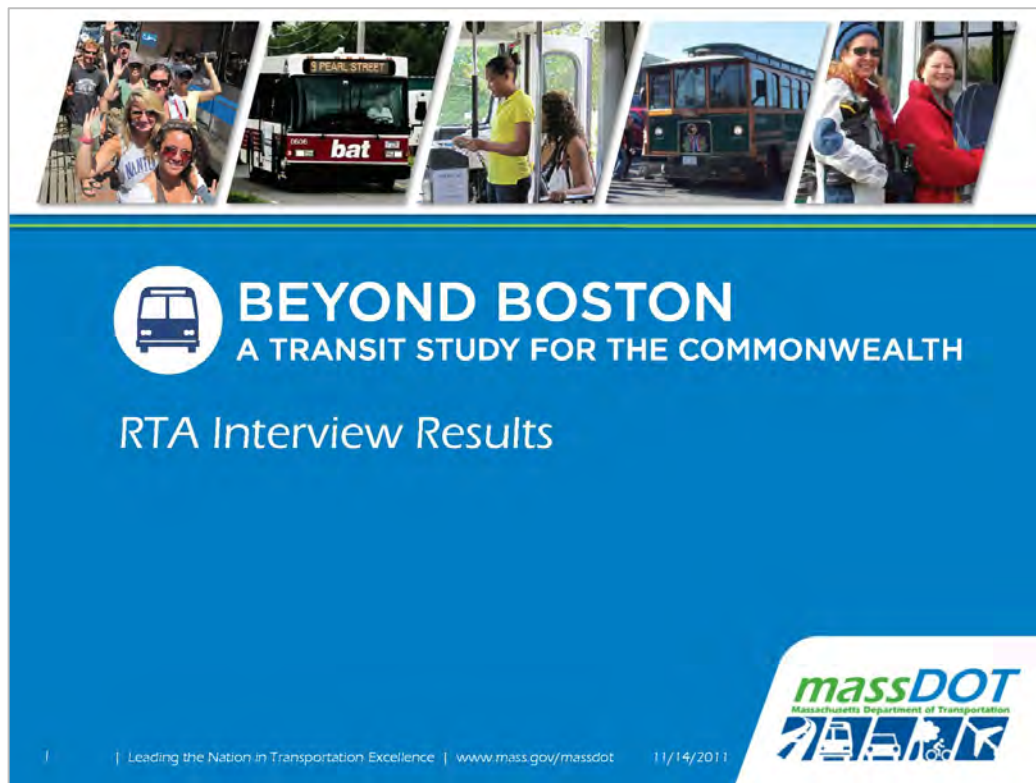
Review Updated Draft Recommendations
Discussion of Draft Implementation Plan
Project Wrap-up



STAKEHOLDER INTERVIEW PROCESS

As discussed, stakeholder interviews were a critical part of the Beyond Boston study and advised much of the study's analysis and findings. Interviews were conducted anonymously therefore findings were summarized and generalized across groups. Results of the interview process were documented in presentation materials that were prepared for the November 14th and December 19th Advisory Committee meetings and discussed with that group. The presentation materials are shown in the following text in the same format (power point slides) and with the same content as presented to the Advisory Committee. Results from the RTA interviews are shown first, followed by the non-RTA interviews.

Key Findings: RTA Interview Results





RTA Interviews

- 15 interviews with RTA Administrators between October 21 – November 3
- Individual meetings on-site at RTAs
- Questions were open-ended
- Objective:
 - Understand the strengths, challenges, and opportunities affecting the existing and future delivery of public transportation services



1. What Are Your Most Important Needs?

- Evening and weekend service
- More frequent service
- Service to specific user groups (seniors, disabled, college/university, tripper service)





2. What Are Your Major Challenges?

■ Funding

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3. What Do You Do Particularly Well?

■ Customer Service and Staff Culture

- RTAs know, understand, and listen to customers

■ Partnerships

- University, COAs, local leadership, RTAP, Governor's Commission

■ Technology

- CharlieCard, CAD/AVL, IVR, MDTs, real-time passenger info, Google Transit

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BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH



4. What Accomplishments Are You Proud of?

■ Service Improvements

- Seasonal service, new service, commuter buses, less holidays without service, park-and-ride, more fixed-route

■ Capital Investments

- New transit centers/stations

■ Customer Service

- Customer satisfaction, consumer advisory groups

■ Technology/ITS

- Google Transit, fareboxes, real-time info, CharlieCard



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5. What Do You Struggle With?

■ Funding Uncertainty

- Difficult to plan ahead, cash flow, need to borrow money until state money comes in

■ Demand for new/more service in smaller communities and/or to new developments

■ Increasing paratransit and ADA costs



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6. What Projects Would Improve Service?

- Evening service
- Weekend service
- More frequent service
- Service to new areas/new markets
- Coordination with local medical offices, state agencies (Elder Affairs, HST)



7. What Prevents You?

- Funding





8. What Do You Contract For?

- All: Fixed-route and demand-response operations
- Most: Maintenance (vehicles and facilities), management (facilities)
- Other: HST brokerage, Advertising, ITS, Legal Auditing, Engineering, other



9. How Are Your Contractor Relationships?

- Most describe relationships as “very good”
- Some “excellent”, others “generally good”
- All work closely with contractors
- Most have open and frank relationships





10. How is Your Relationship with Your Board?

- “Excellent” to “very good” to “stable”
- Some boards are more involved in operations than others
- Some meet monthly, some meet occasionally



11. What Types of Partnerships?

- MBTA
 - Commuter rail stations, CharlieCard
- Colleges/Universities
 - Free fare, training for operators/maintenance, technology and staffing assistance
- Economic Development agencies/businesses
 - Chambers, tourist commissions, large employers
- RPAs and TMAs
- Between RTAs
 - Shared service, for advice, interoperability on paratransit, joint procurement



12. Ideas for Additional Partnerships?

- Between RTAs for regional services
- More university partnerships
- Many ideas for smaller or unique partnerships

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13. How Are Needs Changing?

- More communities want service
- Areas are growing (often outward)
- Population is aging which is increasing demand
- Universities/colleges have grown/want more service
- But some RTAs say no major changes; stable

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14. How Do You Keep Abreast of Changes?

- High level of involvement with community and riders
- Involved with organizations and agencies (Chambers, colleges)
- Regular board meetings
- Regular meetings with RPAs



15. What Are Major Funding Challenges?

- Funding in arrears
- Capital funding
- Difficult to raise fares
- Hard to raise additional revenues
- Allocations do not match service demands
- Cash reserve limits





16. How is Relationship with MassDOT?

- MassDOT understaffed
- Policies change too often
- Tough to get responses; don't provide enough guidance
- MassDOT should be more of an ally
- Indirect relationship through MARTA does not work well



17. What is Your Vision for RTAs?

- More stable and equitable funding
- Better collaboration between MassDOT and RTAs
- Broaden efforts to become more multi-modal
- Become more cost-efficient and improve service





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A TRANSIT STUDY FOR THE COMMONWEALTH

Key Findings: Non-RTA Interview Results



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Meeting Agenda

Additional Stakeholder Interviews

Vision and Goals



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Agenda

- Additional Stakeholder Interviews - Update
- Draft Vision Statement & Study Goals
- Preliminary Evaluation of Funding Issues
- Next Steps
 - Identification of Key Areas for Future Focus



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Additional Stakeholder Interviews

- MassDOT
- MBTA
- Council on Aging
- Contractors
- Unions
- MassPIRG
- Regional Planning Commission
- Bus Riders United
- Various state agencies
- MARTA to be interviewed early January

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Additional Stakeholder Interviews

- Recent interviews:
 - Reflect non-RTA perspective
 - Based on open ended discussions
 - Wide-ranging viewpoints, some conflicting with RTA perspective and others much the same

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Predominant Topics

- Transit Operations and Service Design
- Collaboration/Partnerships
 - MassDOT-RTA Relation
- Funding
- Stakeholder Thoughts on Vision

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Transit Operations and Service Design

- RTAs strong at transit operations
 - Professionally managed agencies
 - Buses run on time, are clean, and reliable
 - Good labor relations
- But not as strong at service design
 - Some RTAs slow to respond to new or evolving markets
 - Limited experimentation with new service types
 - More service is needed
 - Some RTAs have not changed their services in long time
 - Need to be more innovative

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Transit Operations and Service Design

- Transit is a complicated business
 - Lots of specialization within services
 - Staff resources very limited
- Need for greater technical capabilities
 - Mobility management and service planning
 - Scheduling
 - Multimodal solutions
 - Paratransit service coordination
 - Contracting
 - Capital planning
 - Marketing
 - Implementation and use of technology



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Transit Service Opportunities

- Make better use of existing technical resources
 - Regional Planning Commissions (RPCs)
 - Effective for many RTAs already
 - MBTA
 - Training, service and capital planning, contracting
 - May be more helpful for some RTAs than others
- Concentrate expertise at individual RTAs
 - "Centers of Excellence"
 - Technology (e.g. hardware specs, data analysis)
 - Vehicle Painting (e.g. shared paint booth)
- Reward innovation

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Collaboration

- RTAs collaborate well at local level
 - Good relations with local political and business leaders
 - Customer base and local leaders may have conflicting goals
 - Sometimes change is difficult/status quo is “easier”
- But independent from state and federal agencies
 - More of a “go it alone” attitude; minimal information sharing
 - External partners are under-utilized resource
- Need more leadership from State
 - Evaluate gaps in service from statewide perspective
 - Monitor and take action on industry trends

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MassDOT– RTA Relationship

- Lack of mutual respect and sense of partnership
- MassDOT, RTAs and MBTA should be partners– same “team” with same mission
- Need to better define roles (MassDOT, RTAs and MBTA)
- MassDOT has not “led” RTAs
- Need to strengthen communication
 - Frequency
 - Quality



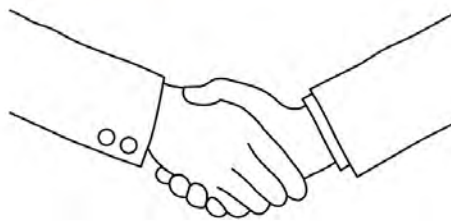
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Collaboration Opportunities

- Openness and willingness to change
 - Many local partners sense willingness from RTAs
 - State agencies willing to adapt and change
 - Desire to improve status quo



MassDOT– RTA Relationship

- Use MassDOT– MPO/RPC relationship as model
 - Increase MPO involvement in transit services?
 - Give MassDOT a seat on RTA Boards?
 - Stronger transit emphasis in Statewide Transportation Plan?
- Human Service Transportation (HST) Office as possible model
- Increase collaboration
 - Between MBTA and RTAs
 - Between MassDOT and RTAs
 - Between MPOs and RTAs
 - Share operations, facilities and technical resources



Other Collaboration Opportunities

■ Broaden & Diversify Support

- Closer understanding of local markets and need
- More strategic marketing and better communication
 - Seniors, seniors, immigrants, social services, economic development, etc.

■ More RTA to RTA collaboration

- Cross pollinate ideas with other peers

■ Strengthen partnerships at state/federal level

- Share information and resources
- “Best Practices Conferences”



Funding

- RTAs manage budget and cash flow well
- Need to increase overall funding levels (also the current primary focus of RTAs)
- Need to improve funding mechanisms
- State funding contribution is under appreciated
 - Massachusetts funds a large portion of RTA operations
 - RTAs better off than peers in many other states
- Potential to increase funding from local sources
 - May be challenging, but possible





Funding Opportunities

- Need mechanism to address uncertainty/unpredictability
 - Stop funding in arrears
 - Set minimum funding amounts
- Eliminate mismatch between federal and state spending time limits
- Link funding and performance metrics
- Make process fair and easy to understand
- Reward productivity, efficiency and innovation

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Stakeholder Thoughts on Vision

- Services should adapt to serve core markets
- Services should change as markets change
- After this, secondary objectives are unclear...
 - Increase productivity?
 - Expand coverage?
 - Encourage economic development?

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Vision Statements

MassDOT Vision:

Leading the Nation in Transportation Excellence.

Proposed Statewide Transit Vision:

Create a network of public transportation services that provide an effective level of mobility, meet customer needs and offer a compelling alternative to the automobile.

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Emerging Study Goals

■ FUNDING:

- Develop a more predictable, equitable, and transparent funding process
- Better leverage existing sources of funding
- Develop new sustainable sources of funding

■ COST EFFICIENCY AND INNOVATION:

- Continue to improve efficiency to maximize use of available resources
- Actively pursue innovative practices and new technologies

■ SERVICE EFFECTIVENESS:

- Better match services with evolving demand
- Make services easier to use
- Provide a more seamless statewide transit experience

■ COLLABORATION:

- Enhance cooperation and continue to align goals and efforts across transportation providers, users, and funders



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