

APPENDIX A

Advisory Committee Meetings



Appendix A 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.

Meeting #1: October 14, 2011

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

Meeting #2: November 14, 2011

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

Meeting #3: December 19, 2011

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

Meeting #4: 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

Meeting #5: 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

Meeting #6: April 11, 2012

Breakout Sessions to discuss Initiatives:

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

Meeting #7: May 24, 2012

Discussion of Proposed Draft Action Plans

Meeting #8: June 14, 2012

Review Updated Draft Action Plans
Discussion of Draft Implementation Plan
Project Wrap-up



Advisory Committee Meeting #1: October 14, 2011

**BEYOND BOSTON – ADVISORY COMMITTEE MEETING #1
FRIDAY, OCTOBER 14, 2011, 12:30 PM - 2:30 PM
ROOM 3150, TEN PARK PLAZA, STATE TRANSPORTATION BUILDING**

MEETING AGENDA

1. Welcome and Introductions (20 minutes)
2. Project Overview/Timeline (20 minutes)
 - RTA Profiles
 - RTA Site Visits
 - Interview Topics
 - Civic Engagement Plan/Stakeholder Outreach
 - Web Site Development
3. Beyond Boston - Project Vision and Goals (30 minutes)
 - Input from Advisory Committee Members
 - Ideas, Concerns, and Objectives
4. Next Steps (10 minutes)
 - Upcoming Meetings



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #1: Introductory Presentation and Project Overview



Beyond Boston

A Transit Study for the Commonwealth



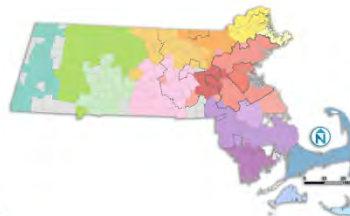
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Beyond Boston: A Transit Study for the Commonwealth

Agenda

- Project Overview
- Timeline
- Upcoming Project Activity
 - RTA Profiles
 - RTA Site Visits
 - Civic Engagement Plan
- Project Vision and Goals
- Next Steps



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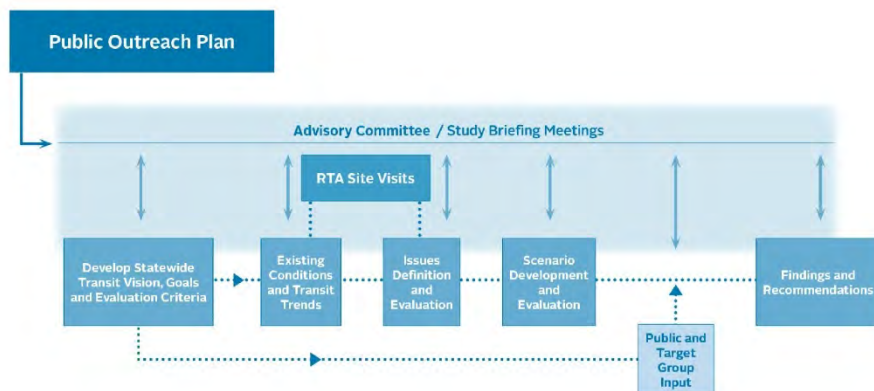


Project Overview

- Study background/familiarization
- Develop a statewide transit vision
- Identify existing conditions and transit system trends
- Identify issues and improvement opportunities
- Evaluate improvement scenarios
- Develop recommendations



Study Overview





Study Background/Familiarization

- Review previous plans and studies
- Collect background data
- Develop RTA profiles
- Identify stakeholders
- Create civic engagement plan



Develop Statewide Transit Vision

- Set strategic direction
 - Define expectations for service network
 - Create broad guidelines for RTAs
 - Integrate with MassDOT's transit vision
- Collaborative and iterative process
 - Input from staff
 - Working session with advisory committee





Existing Conditions & Transit System Trends

- Emphasis on stakeholder input
 - RTA Administrators
 - Local, regional and state stakeholders
- System and network level data
 - Financial
 - Service
 - Technology
 - Administrative and organizational
 - Marketing



Issues and Improvement Opportunities

- Compare and contrast RTA experience
- Categorize issues and systems
- Identify best practices
- Consistency with statewide transit vision
- Consider national trends
 - Assess applicability to Massachusetts

Potential Topics

- Service policies
- Fare policies
- Service Provision
- Operating contracts
- Partnerships
- Financing
- Innovative practices
- Technology
- Staffing levels
- Planning & scheduling practices
- Public information & marketing
- Human Service Transportation





Evaluate Improvement Scenarios

- Screen long list of opportunities based on:
 - Transit vision, goals and objectives
 - Potential for improvement
 - Potential for consensus
 - Realistic chance for implementation
- Evaluate costs, benefits and impacts
- Focus on high-value opportunities



Develop Recommendations

- Collaborative process
 - MassDOT staff
 - Advisory Committee
 - RTAs
- Objective is to create a system that is:
 - More effective and efficient
 - More transparent, predictable and understandable
 - Broad constituent support
 - Fundable





BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH



Beyond Boston: A Transit Study for the Commonwealth

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BEYOND BOSTON – ADVISORY COMMITTEE MEETING #1 MEETING NOTES

LOCATION OF MEETING: MassDOT, 10 Park Plaza, Boston

DATE/TIME OF MEETING: October 14, 2011, 12:30 PM – 2:00 PM

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 (by phone)

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 (did not attend)

Scott Hamwey, MassDOT, Office of Transportation Planning

Matt Ciborowski, MassDOT, Office of Transportation Planning

Kyle Emge, MassDOT

John Englert, MassDOT, Rail and Transit Division

John Lozada, MassDOT, Office of Civil Rights

Charles Planck, MBTA Office of Strategic Initiatives and Performance

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ADG Planning

Nancy Farrell, Regina Villa Associates

Regan Checchio, Regina Villa Associates

Agency/Public:

Joe Costanzo, representing Jim Scanlan (Lowell Regional Transit Authority), who could not attend

Heather M. Hume, MBTA Service Planning

Jeanette Orsino, MA Association of Regional Transit Agencies (MARTA)

PURPOSE/SUBJECT: This was the first meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included a project overview and timeline; preview of upcoming project activities; a discussion of the project vision and goals; and review of next steps.

HANDOUTS: Agenda; Sample RTA Profile: Cape Cod Regional Transit Authority; Draft Interview Guide for Meetings with RTA Administrators.

Introductions

Scott Hamwey, Project Manager for the Massachusetts Department of Transportation (MassDOT), Office of Transportation Planning, welcomed the participants. He said that the Advisory Committee (AC) will be crucial to the success of the project because the members represent a variety of stakeholders and bring an array of perspectives to the initiative. The reform legislation that created a single transportation organization requires MassDOT to identify ways for transit to be more efficient and better serve the needs of the Commonwealth. He introduced the consulting team: Geoff Slater, Bethany Whitaker and Ralph DeNisco of Nelson\Nygaard; Anne Galbraith, ASG Planning; Nancy Farrell and Regan Checchio, Regina Villa Associates. He said that the consultant team would present most of the meeting's agenda.

The participants first introduced themselves and described their affiliations in brief (see the list of attendees).

Project Overview

Geoff Slater, Nelson\Nygaard, provided a project overview. He said the first steps for the team are to become familiar with background materials and information. The team is counting on a collaborative process to help develop a vision of transit for the Commonwealth. The AC knows the transit system and services and can best help MassDOT develop broad guidelines for a more effective and efficient statewide transit system. Mr. Slater said the members have experience, issues and ideas to share, and the team is looking forward to hearing them. He showed a Study Overview chart and said that the team began its work by reviewing previous plans and studies.

The next step will be to collect background data, develop profiles of each Regional Transit Authority (RTA), identify stakeholders and create a civic engagement plan. The project team distributed a sample RTA profile for the Cape Cod RTA and asked for feedback. Mr. Slater also noted that yellow highlighted items were gaps that needed to be filled in by the RTAs. This information will help the team and AC develop a statewide transit vision. This vision will define expectations for the service network; create broad guidelines for RTAs; and integrate with MassDOT's transit vision. He emphasized the process as iterative and collaborative, with input from staff and the committee.

The team has set up interview meetings over the next two weeks with all of the RTAs to gather information on existing conditions and transit system trends. This stakeholder input is very important to the process. The team is seeking financial, service, technology, administrative and organizational and marketing data.

With the data in hand, the team will compare and contrast RTA experiences, seeking to categorize issues and systems and identify best practices. The team will look for consistency with the state's transit vision and consider national trends and their applicability to Massachusetts. Next, the team will seek AC support in screening a list of opportunities based on:

- A transit vision, goals and opportunities



- The potential for improvement
- The potential for consensus around proposals, and
- The realistic chance for implementation

The evaluation will consider costs, benefits and impacts and focus on high-value opportunities.

The development of recommendations will be a collaborative process, including MassDOT, the AC and the RTAs. The objective of the process is to create a system that is more effective and efficient; becomes more transparent, predictable and understandable; has broad constituent support and can be funded.

Mr. Slater said he will conduct some of the RTA interviews, along with Ms. Whitaker, Ms. Galbraith and Mr. DeNisco. They plan to ask for information that should be easily available, including the Score Card statistics. In response to a question from Frank Gay, Mr. Slater said that the team is looking for National Transit Database (NTD) data, key facts and notable initiatives and challenges. Ms. Whitaker said that the discussions will be confidential and the information will not be attributed to an interviewee. The team distributed a “Draft Interview Guide for Meetings with RTA Administrators” and welcomed comments and questions. Mr. Hamwey asked the members to provide comments by early next week on the project outline and plan; they can send any comments to him at Scott.Hamwey@state.ma.us.

Civic Engagement

Nancy Farrell, RVA, distributed a draft Civic Engagement Plan for the Beyond Boston project. Ms. Farrell said that the plan calls for a high level of involvement by RTAs in particular, since the project relates primarily to policy development. The AC will be the primary vehicle for input, reviewing ideas and concepts and advising MassDOT and the team throughout the project. The AC will meet approximately monthly, and meeting information and summaries will be posted on a project website.

The team also plans to interview stakeholder groups, particularly those who represent Environmental Justice populations, business leaders and groups, regional planning organizations, elected officials, economic development groups and older adults. A limited number of briefings will be prepared at key intervals. The general public will be invited to participate in a centrally located public meeting held toward the end of the study when draft recommendations are prepared for review.

The project team will develop and maintain a database for sharing information about meetings, project events and documents and to solicit comments and ideas from stakeholders and the general public. The team will provide content and regular updates for the MassDOT web page for the study. The team will also draft media materials for distribution by MassDOT for significant project events or milestones.

Ms. Farrell added that MassDOT is committed to nondiscrimination in all of its programs and activities and will conduct meetings in accessible locations; will provide interpreters or assisted listening devices at meetings and will translate key documents on request with the goal of ensuring full and fair participation in the study process. MassDOT’s complaint procedure will be made available by phone, TTY and on the website.

Mary Ellen Blunt encouraged the team to include regional planning agencies in any stakeholder interviews since they are aware of gaps in transit coverage in the regions they serve. Mr. Lozada reinforced the team’s goal of being inclusive of Title VI populations.

Mr. Hamwey welcomed comments on the draft plan and asked the members to send them to him next week.

Project Vision and Goals

Ms. Whitaker moderated a discussion of project visions and goals provided by committee members. She asked them to share their ideas, concerns and objectives:



Tom Narrigan, First Transit: Funding is a constant struggle, which affects everything; he would like to deal with the financial implications in a way that would result in a stable and predictable source of adequate funding.

Mary MacInnes, PVTA: She believes that residents are significantly underserved and would like to see funds redistributed to serve more of these populations and areas.

John Lozada, MassDOT Civil Rights: Because MassDOT and the RTAs accept federal funding, he wants to ensure that communities are appropriately served, whether they are disabled, low income, or in another protected group.

Tanja Ryden, EOHHS: Ms. Ryden works with six RTAs and confirmed that many consumers are underserved and she would like to see that change.

Charles Planck, MBTA: Believes that every transit agency must demonstrate that it offers well-managed service or identify where and how it can improve that service.

Frank Gay, GATRA: Mr. Gay believes there has to be a state transit policy.

Carolyn Brennan, East Longmeadow Council on Aging: Ms. Brennan said that over the next decade, the issue of assisting elders to live at home independently will become a huge issue and has to be dealt with whether by transit or paratransit.

Richard O'Flaherty, ATU Local 1547: Mr. O'Flaherty welcomes the study process and believes that more federal funding is needed to increase service. He wants to advocate for people who ride public transit and make sure they can get where they need to go.

John Englert, MassDOT: There is a need to look at the service networks and how they are working for different communities; he also wants to figure out how to get the limited resources that are available to be used by as many people as possible.

Mary Ellen Blunt, CMRPC: Over 20 years Ms. Blunt has seen more gaps in planning and funding. She said that the needs and current services in the system need to be defined, and must move to more effectively match needs with services.

Joe Costanzo, MVRTA: More service is needed and since the service is organized around municipalities, elected officials should be part of the conversation. The Commonwealth has to link transit with mobility and economic development, particularly for the Gateway Cities, and he agreed with Ms. Brennan that elder transportation is the guerilla in the room. There is a gap between when elders give up driving and when they are ready to use paratransit, and that gap increases the sense of isolation in this population.

Steve O'Neil, WRTA: Mr. O'Neil said that the study should build on the progress RTAs have made; and he thinks that Housing and Economic Development should also be involved in the analysis and solutions.

Ray LeDoux, BAT: The team should look at Blue Sky policies as part of a comprehensive plan for stable funding; the work should include riders and non-riders; and he would like to study to generate tactics that the RTAs can use to implement best practices rather than develop a plan without ideas for implementation.

Angela Grant, MVTA: Ms. Grant said her issues are slightly different since service on Martha's Vineyard has a more seasonal orientation; but seven-day service is a huge issue and should be a the subject of a statewide policy; predictable funding and an implementation plan are also key.

Ms. Whitaker thanked the members for their observations and said it looks like mobility, economic development and elders are among the key concerns, along with funding and predictability. Statewide minimum policies may also be helpful, based on the comments.



Mr. Slater said that in looking at service redesign issues, his experience is that they need to be practical and to acknowledge the possibility of tradeoffs to implement them. The goal is to seek a balance while recognizing that it's rarely possible to get everything you would like.

Ms. Whitaker asked the members to comment on their **priorities and objectives**.

Ms. MacInnes said that PVTA has not had a lot of opportunities to add service over the last 10 years; in 2003-2004, 21% of service was cut. At the time, PVTA had to decide whether to cut service completely to some areas or to maintain wider but thin coverage, which was the final choice. Ms. Blunt said that the MPOs have just finished their 20-year plans and one of the issues that is clear is the need to restore late night service so workers can reach second and third shift jobs. Increased service is also desirable, as well as expanded service coverage. There is renewed interest in community wide service. Mr. Englert said that many workers can't reach the first shift using transit since it often begins too late for them.

Mr. O'Flaherty observed that the public needs to be better educated about public transportation. There are many misconceptions and little understanding of the fact that transit can, for example, improve property values in a community. He would like to see communities embrace transit as an asset.

Mr. O'Neil suggested that if service is to increase, it should be done all at once as an integrated system approach.

Mr. Lozada said he wants to ensure Title VI compliance and provide better access for those with limited English proficiency. He suggested there are misconceptions around public participation; he said that an educated public will better understand and advocate for the role of public transit.

Mr. LeDoux said that there are disparities in the levels of service that SRTA offers, and he would like to see a gap analysis to bridge these disparities. He would also like to see a minimum baseline of service recommended. While there has been talk of connecting Gateway Cities by transit, those links are still lacking. Mr. LeDoux also suggested that transferring knowledge between agencies should be a priority. The RTAs can better serve their clients with improvements in technology.

Ms. MacInnes observed that there is a philosophical issue to be discussed in terms of service: whether it should be formulated by demand or across the board. Mr. Slater said that often that kind of tradeoff is made implicitly, but the group should think about and discuss them. Ms. MacInnes said her agency has just prepared an request for proposals for a total review of everything in the PVTA system, looking at whether to concentrate resources, use a demand system or provide access to transit for every city and town. Ms. Blunt suggested service should be all of those things, grasping new opportunities in response to demand but looking constantly where that demand is, because it changes.

Mr. Costanzo said that while the RTAs try to operate as businesses, they are constantly forced to respond to conflicting policy requirements.

Mr. Lozada said the updated census figures provide an opportunity to look at some of the structural challenges environmental justice communities grapple with. He talked about employers providing van service to first shift restaurant workers and late shift cleaning staffs because public transit doesn't meet these needs. Ms. Whitaker agreed this is clearly an issue: communities are changing, work needs change and these situations create opportunities to respond.

Mr. O'Neil pointed out the discrepancy between planning to provide transit and state agencies both permitting and building their own facilities with huge parking lots rather than considering land use and transit as related challenges that can be addressed. Ms. Blunt agreed: there should be land use-transit synergy, using transit to minimize congestion, address air quality concerns and make better connections between these issues. Ms. Grant suggested there should not be any barriers or boundaries to proposals for addressing these issues. Public/private partnerships are typical for water services. User amenities can make transit more appealing. The group should broaden its perspective and not invent boundaries –



which may already exist in their heads – to restrict more global thinking. Ms. MacInnes said there will be differing points of view, but a cookie cutter approach won't work. Mr. Slater said he agrees with her; that kind of approach will not be successful. Providers like RTAs need some flexibility to develop approaches that will let them say yes to new possibilities. Mr. Englert said that evening service needs to be there even for people who aren't using it. A system needs to be complete for when people do need it.

Ms. Whitaker said the discussion was very useful to the team and after the interviews have been completed and the data gathered, the team will come back to the committee with a draft vision that will be the basis for developing policies and goals. In general, the team will try to develop themes or topics for each meeting and will send materials out in advance, when possible.

Mr. Hamwey said MassDOT hopes to be able to complete the study in six months. Mr. LeDoux asked if the study will include transit financing models. Mr. Slater said that if transit financing comes up as an important issue, the team has the capacity to develop the information.

The next meeting will be at Union Station in Worcester, in early to Mid-November. Mr. Hamwey will send out a date as soon as possible. He thanked everyone for participating, and the meeting was adjourned.

NOTE: The meeting was subsequently scheduled for Monday, November 14, from 10:30 am to 12:30 pm, at Union Station in Worcester.



Advisory Committee Meeting #2: November 14, 2011

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #2 MONDAY, NOVEMBER 14, 2011, 10:30 AM – 12:30 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Update on Recent Activities (10 minutes)
2. Results of RTA Meetings (20 minutes)
3. Project Vision and Goals (20 minutes)
4. Major Issues Identified to Date (40 minutes)
 - Input from Advisory Committee Members
5. Next Steps (10 minutes)
 - Finalize RTA profiles
 - Research/refine issues
 - Identify/investigate best practices
 - December meeting date
6. Public Comment



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A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #2: Developing a Vision Statement



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Developing a Vision Statement



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Good Vision Statements:

- Paint a vivid picture of success
- Are succinct and memorable
- Are stretching but achievable

"To organize the world's information and make it universally accessible and useful." (Google)

"Create experiences that combine the magic of software with the power of Internet services across a world of devices." (Microsoft)



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Bad Vision Statements

Issue	Example	Why It Fails
The Kitchen Sink	"Maximize our customers' ability to get their work done."	Too broad to be useful.
The Mumbo-Jumbo	"Develop, deploy, and manage a diverse set of scalable, performant, and strategic knowledge management tools to best serve our constituents, partners, and collaborative organizations, improving the possibility of overall satisfaction among our diverse customer profiles."	Committee-speak jargon. that uses complex language to hide the absence of strong ideas. No one can figure out what this means and therefore it's useless.

Source: *The Art of Project Management*, Scott Berkun



Beyond Boston Vision Statement

- What do you want to achieve?
- Some of the things we heard:
 - Provide a mix of public transportation services services that provide a basic level of mobility
 - Provide a compelling alternative to automobiles
 - Provide a consistent level of service throughout the state and more where possible
 - But ensure local flexibility
- *Deliver a network of public transportation services that provide a basic level of mobility and compelling alternatives to automobiles?*





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Advisory Committee Meeting #2: RTA Administrator Interview Results



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RTA Interview Results



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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



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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





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



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





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



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

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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



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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Advisory Committee Meeting #2: Preliminary Issues and Opportunities



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Issues and Opportunities



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Issues and Opportunities

- Presentation describes issues in terms of:
 - Concerns/challenges
 - Potential opportunities
- Issues to-date identified:
 - Largely through meetings with RTAs
 - Limited meetings with MassDOT staff
- Additional issues expected to be identified through add'l stakeholder meetings and review of RTA info



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Major Issues and Opportunities

- Funding
- Service Design
- Fares
- Public Information
- Contracting
- Partnerships
- MassDOT-RTA Relations
- Statewide Initiatives



Funding

- Concerns/Challenges
 - Lack of predictability
 - Funding “in arrears” creates uncertainty and cash flow challenges
 - State allocations not based on any clear metrics and viewed by most as inequitable
 - RTAs must “guess” at how much funding will be available.





Funding

■ Opportunities

- Identify mechanisms to transition to forward funding
- Develop more transparent and more predictable funding process:
 - For both operations and capital
 - Previous attempt failed, but should try again.
- MassDOT guidance on state funding availability to help RTAs prepare budgets
- Develop Statewide RTA Capital Plan



Service Design

■ Concerns/Challenges

- Demands for service exceed resources
- Different priorities in different areas—fixed-route versus demand-response:
- Good RTA-community relations make it hard to:
 - Say no to new service requests
 - Revise/discontinue poorly performing services
- Most RTAs do not have service guidelines or standards
- Fleets not always “right-sized” for service





Service Design

■ Opportunities

- Improve service within existing funding levels
- Conduct periodic Comprehensive Service Analyses (CSAs)
- Develop processes to explicitly consider service priorities and trade-offs (for example, fixed-route vs demand-response)
- Develop service guidelines
 - Develop service and performance guidelines
 - Recognize different service area types
 - Incorporate best practices from other states
- Develop statewide fleet strategy (big bus v. small bus)

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Fares

■ Concerns/Challenges

- It is difficult for RTAs to raise fares, even if they are comparably low

■ Opportunities

- Develop fare structure guidelines/minimum fares
- Use higher fare revenues to fund service expansion (for example, nights and weekends)

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Public Information

■ Challenges/Concerns

- Widely varying degrees of public information:
 - System maps
 - Schedules
 - Web-based schedule information
 - Real-time passenger information (web, smart phone, etc.)
- Some very good; some not
- Some service characterized as “invisible”



Public Information

■ Opportunities

- Provide minimum level of information statewide in similar formats:
 - System maps
 - Printed schedules
 - Google Transit
 - Other
- Statewide real-time passenger initiative (web, smartphone, etc.)
- MassDOT assistance on inter-regional transit information





Contracting

■ Concerns/Challenges

- Most RTAs contract for most functions from operations to marketing to auditing.
- All contract individually using different approaches
- This provides for local flexibility but may miss opportunities for efficiencies.



Contracting

■ Opportunities

- Identify best practices within existing contracts in MA and elsewhere in US.
- Incorporate best practices within MA approach
- Develop minimum performance standards for operating and maintenance contracts
- Develop model RFPs for use by RTAs





MassDOT-RTA Relations

■ Concerns/Challenges

- MassDOT staff is overburdened–this can lead to delayed responses to questions or requests for guidance
- Shifts in state policy sometime difficult for RTAs to respond to
- RTA-MassDOT communication is too indirect and primarily through MARTA
- Some RTAs are more innovative than others; MassDOT could provide more assistance
- Need a more aligned partnership between RTAs and MassDOT.



MassDOT-RTA Relations

■ Opportunities

- Develop MassDOT-RTA relationship as a partnership focused on mutual problem solving
- Develop mechanism for direct MassDOT-RTA communications (quarterly meetings?)
- Make MassDOT policies clearer and provide more consistent message on regional transit
- Provide assistance to RTAs on federal compliance, grants, reporting, etc.
- Consider state representation on RTA Boards–state would be more aware of RTA issues; RTAs would get consistent message from state





Partnerships

■ Challenges/Concerns

- RTAs have developed many innovative partnerships (colleges, intercity bus operators, private employers, etc.), see the benefits and desire more
- Some logical partnerships don't exist (for example, with some universities and community-based transit systems)
- Size of the MBTA can make partnerships with RTAs challenging (even simple MBTA sign-offs can be time-consuming and complicated)
- MARTA serves as a good forum for inter-RTA communication, but not for RTA-MassDOT communications



Partnerships

■ Opportunities

- Identify most effective partnerships; expand throughout state
- MassDOT assistance with multi-RTA initiatives (for example, statewide UPass system with state colleges and universities)
- Better incorporate community-operated services into regional network
- Consider transferring operations of all outlying MBTA rail stations to local RTAs.
- Clarify roles and mission for MassDOT, RTA, and MARTA





Statewide Initiatives

■ Challenges/Concerns

- Title VI is getting more complex and more burdensome
- Use of, and level of expertise with technology and data, varies among RTAs varies greatly
- Joint purchasing sometimes helps and sometimes doesn't
- Growing senior population and move towards "Aging in Place" requires greater coordination with agencies such as MA HST and EOHHS



Statewide Initiatives

■ Opportunities

- Better guidance from MassDOT on Title VI and other federal and state requirements/opportunities
- ITS guidelines/initiatives to bring technology advances to all corners of state
- Provide opportunities but not requirements for open procurements via Comm-PASS (vehicles? fuel?)
- Statewide travel training program and customer service training for drivers
- A mechanism for better coordination with other relevant state agencies





If we can successfully address these issues, we get:

- More predictable funding
- Better and more service
- More productive, efficient, and consistent service
- Better information to make service easier to use
- Greater stability
- More effective contracting practices
- More resources available for service expansion
- MassDOT and RTAs working together as partners



What Else?

- Did we cover all of your major issues?
- If not, what did we miss?

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #2 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: November 14, 2011, 10:30 PM –12:30 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Carolyn Brennan, East Longmeadow Council on Aging

Matt Ciborowski, MassDOT, Office of Transportation Planning

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

Mary MacInnes, Pioneer Valley Transit Authority

Tom Narrigan, First Transit

Richard O'Flaherty, ATU Brockton Local 1547

Stephen O'Neil, Worcester Regional Transit Authority

Charles Planck, MBTA Office of Strategic Initiatives and Performance

Tanja Ryden, Executive Office of Health and Human Services

Did Not Attend:

John Englert, MassDOT

James Scanlon, Lowell Regional Transit Authority

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ADG Planning

Regan Checchio, Regina Villa Associates

**Agency/Public:**

Bill McNulty, Old Colony Planning Council

Jeanette Orsino, MA Association of Regional Transit Agencies (MARTA)

Mike Sharff, Peter Pan Bus

Gary Shepard, Berkshire Regional Transit Authority (BRTA)

PURPOSE/SUBJECT: This was the second meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included a project overview and timeline; preview of upcoming project activities; a discussion of the project vision and goals; and review of next steps.

HANDOUTS: Agenda

Introductions and Update on Recent Activities

Scott Hamwey, Project Manager for the Massachusetts Department of Transportation (MassDOT), Office of Transportation Planning, welcomed the participants. He noted that the Advisory Committee (AC) had a new member – Chris Anzuoni, Plymouth and Brockton Street Railway Company. He noted that Mr. Anzuoni will be representing the private carriers on the AC. He invited those present to introduce themselves (see Attendance).

Mr. Hamwey thanked the Regional Transit Authorities (RTAs) for their participation in interviews with the consultant team. He noted that all 15 RTAs had participated in the process and answered questions. Mr. Hamwey then briefly reviewed the meeting goals.

Results of FTA Meetings

Bethany Whitaker, Nelson\Nygaard, gave a brief presentation summarizing the RTA interview results. She noted that the project team had conducted 15 interviews with RTA administrators between October 21 – November 3. The objective of these meetings was to understand the strengths, challenges, and opportunities affecting the existing and future delivery of public transportation services.

RTAs identified customer service/staff culture, partnerships with organizations (universities, Councils on Aging, etc.), and use of technology as things they do very well. They were most proud of service improvements, capital investments, customer service and use of technology. RTAs said they struggle with funding uncertainty, demands for new or more service in smaller communities or new developments, and increased paratransit and ADA costs. The major challenge identified by all of the RTAs was funding.

When asked what projects would improve service, RTAs said: (1) evening service; (2) weekend service; (3) more frequent service; (4) service to new areas and new markets; and (5) coordination with local medical office and state agencies (such as Elder Affairs).

Funding is seen as a barrier to these potential projects. RTAs identified particular funding challenges: (1) funding in arrears; (2) capital funding; (3) difficulty raising fares; (4) hard to raise additional revenues; (5) allocations do not match service demands; and (6) cash reserve limits.

All RTAs work closely with contractors and most said they have open and frank relationships. There was variation on the types of contracts RTAs use. All RTAs contract for fixed-route and demand-response operations. Most contract for maintenance (vehicles and facilities) and management. Some others contract for additional services such as human service transportation (HST) brokerage, advertising,



intelligent transportation systems (ITS), legal auditing, and engineering. Most RTAs described their relationships with contractors as "very good."

RTA descriptions of their relationships with their boards ranged from "excellent" to "good" to "stable." Some boards are more involved in operations than others. Some meet monthly and others occasionally.

RTAs described existing partnerships with the MBTA, colleges and universities, economic development agencies and businesses, regional planning agencies (RPAs) and transportation management associations (TMAs), and with other RTAs. They see opportunities for partnership between RTAs for regional services and additional university partnerships. Many have ideas for smaller and unique partnerships.

RTAs see that their customer needs are changing:

- More communities want service
- Areas are growing (often outward)
- Population is aging, which increases demand
- Universities and colleges have grown and want more service

To keep abreast of these changes, RTAs reported a high level of involvement with the community and riders. They are involved with local organizations and agencies. They also have regular board meetings and meetings with RPAs.

After reviewing these responses, Ms. Whitaker asked for feedback from the AC.

Charles Planck, MBTA, confirmed that the project team only interviewed RTA staff, not municipal representatives or the general project.

Project Vision and Goals

Geoff Slater, Nelson\Nygaard, moderated a discussion of project vision and goals. He began with a vision statement:

Deliver a network of public transportation services that provide a basic level of mobility and compelling alternatives to automobiles.

Ray LeDoux, Brockton Area Transit Authority, asked if this vision statement was intended to be project-based or a more global vision for RTAs. Mr. Slater said it is intended to be global.

The following recommendations were made by AC members about specific language that they would like to be reflected in the vision statement:

- Mary MacInnes, Pioneer Valley Transit Authority: suggested adding "satisfying the need of transit-dependent riders and attracting choice riders"
- Mr. Hamwey: "meets customer needs"
- John Lozada, MassDOT Office of Civil Rights: need to define "basic level;" make more aspirational
- Frank Gay, Greater Attleboro Taunton Regional Transit Authority: a "basic level" of service does not attract choice riders
- Mr. Planck: "efficient" instead of "basic"
- Mr. LeDoux: "basic" is triage; "efficient" is too cost-based
- Mr. Slater: replace "efficient" with "effective"
- Richard O'Flaherty, ATU Brockton Local 1547: "basic" is fine in times of economic hardship; to move forward, words like "efficient" are needed



- Tanja Ryden, Executive Office of Health and Human Services: needs to be more aspirational and show RTAs as the leaders for supporting a web of public and community transportation resources
- Tom Narrigan, First Transit: "deliver a coordinated network"
- Mr. Planck: include "cooperatively"
- Mr. LeDoux: needs to be more aspirational
- Mr. O'Flaherty: "deliver a network"
- Mary Ellen Blunt, Central Massachusetts Regional Planning Commission: "create a network" to show the RTAs are building something

The group ended with a revised vision statement:

Create a network of public transportation services that provides an effective level of mobility, meets customer needs and offers compelling alternatives to automobiles.

Major Issues Identified to Date

Mr. Slater then proceeded to discuss the issues identified through the meetings with the RTAs and MassDOT staff, as well as potential opportunities to address them. He noted that more issues are expected to be identified through additional stakeholder meetings and review of RTA information.

Funding

Mr. LeDoux said that the challenge with finding a formula for funding is that the some RTAs are penalized for how they got to their current point. Mr. Slater asked if that was the problem when a more predictable funding process was tried before. Mr. LeDoux suggested having a base floor and allowing everyone to reach that floor. He said RTAs over that base should not be penalized.

Service Design

Mr. Narrigan asked what the team meant by "right-sized fleet." Mr. Slater explained that some RTAs have the wrong type of vehicles for the type of service they want to provide – too small or too big.

Mr. LeDoux asked for examples of service priorities and trade-offs. Mr. Slater said examples would be additional fixed routes versus less demand response or weekend service versus evening service.

Mr. Planck suggested explicitly endorsing the incorporation of technology and data about ridership into service design.

Ms. Blunt asked for clarification on what "statewide fleet strategy" means. Mr. Slater said it is intended to address the idea of developing funding for fleets by need.

Mr. Lozada said that there needs to be thinking about the public response from advocates to a service-design model.

Mr. Anzuoni said that there are many constraints in serving transit-dependent populations. Ralph DeNisco, Nelson\Nygaard, said that service guidelines can help RTAs make these difficult decisions.

Mr. LeDoux said that in order to address a fleet strategy, the core fleet requirements of each RTA need to be examined. Mr. Slater said that there are equity issues, and the actual system needs should be addressed.

Fares

Ms. MacInnes said that most RTAs raise fares just to maintain an existing level of service. They do not have the luxury of raising fares to expand service.

Mr. Narrigan asked if the project team saw barriers to fare increases as political, procedural or customer-based. Mr. Slater said they are mostly political.

Mr. Planck asked about a global fare structure. Mr. Slater said he was thinking more along the lines of a minimum fare level, with local options.

Ms. MacInnes pointed out that income levels vary across Massachusetts and that should be a variable.

Mr. Planck offered to provide the standard MBTA fare guidance as a model.

Mr. LeDoux thought that fare guidance could suggest that fares cover a percentage of operations costs. Compliance with state fare guidance could keep RTAs eligible to receive state assistance. He emphasized that it is a difficult issue to solve and requires local input.

Public Information

Mr. Narrigan asked if there was guidance about the use of system maps. Mr. Slater said he believes that RTAs do not need to print them, but they need to have them.

Mr. Lozada noted that under Title VI, this information has to be accessible to many types of individuals.

Ms. Blunt suggested that the MassDOT's website should be beefed up to provide RTA information statewide.

Mr. Narrigan suggested that the RTA information be available on 511.

Ms. MacInnes said it should also be consolidated on Smartraveler.

Ms. Blunt said that, in general, this information should be integrated to provide people with statewide options for transit.

Contracting

Mr. Narrigan said that Massachusetts does not reflect the national trends of hourly cost contracts versus management fee contracts. Mr. Slater said there are tradeoffs, noting that a cost/hour contract carries risk. He suggested that a Massachusetts-type approach could be identified.

Mr. LeDoux said that in order to analyze the contracts, there needs to be data-mining. Contract size as well as collective bargaining rules need to be considered. Mr. Slater said that the team hoped to go through these and look for common features as well as differences. He acknowledges that one size will not fit all, and different approaches are needed for different environments.

Mr. Lozada added that the Disadvantaged Business Enterprise (DBE) and Women-owned Business Enterprise (WBE) components also need to be addressed.

Partnerships

Ms. Blunt said that one of the challenges of MassDOT staff attending RTA Advisory Board meetings is that due to the agency being understaffed, the MassDOT representative could not participate regularly.

Mr. LeDoux suggested strengthening the MPO relationships. Ms. MacInnes noted that MPO meetings are attended by a MassDOT Planning representative, not someone from Rail and Transit. There needs to be better communication between the two divisions.

Mr. Anzuoni added that many transportation groups do not feel tied in to MassDOT.



Statewide Initiatives

Carolyn Brennan, East Longmeadow Council on Aging, asked if this study provided an opportunity to look at the differences in how paratransit is provided. She noted that some communities provide it directly and more cheaply than RTAs. Ms. Whitaker said that some of this information will come out in the cost comparison analysis. She agreed that it was an important issue to consider.

Ms. Blunt suggested the project team focus on the service that is provided now and identify gaps in statewide coverage. Mr. Slater said that the RTAs who choose to use Comprehensive System Analyses (CSAs) will start with a market analysis, but that is not in the purview of this study.

Mr. LeDoux asked if the project team could provide examples of service standard language. Mr. Slater said they could provide that.

Next Steps

Mr. Hamwey noted that the website for the study is now live on the MassDOT site:

<http://www.massdot.state.ma.us/planning/BeyondBostonTransitStudy.aspx>

He explained that AC members who are not representing RTAs will be contacted by the team over the next few weeks in order to have a more in depth discussion of their specific issues.

The next meeting will be at Union Station in Worcester on December 19, 2011 at 10:30 AM. The meeting will focus on analysis of the issues identified.



Advisory Committee Meeting #3: December 19, 2011

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #3 MONDAY, DECEMBER 19, 2011, 10:30 AM – 12:30 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Update on Recent Activities (10 minutes)
2. Results of Stakeholder Interviews (20 minutes)
3. Discussion of Major Issues (60 minutes)
 - Initial Analysis of Key Issues and Best Practices
4. Next Steps (10 minutes)
 - Update on RTA profiles
 - Research/refine issues
 - Set January meeting date
5. Public Comment



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #3: Stakeholder Interviews and Vision and Goals



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A TRANSIT STUDY FOR THE COMMONWEALTH

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
- First Transit
- 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



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





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

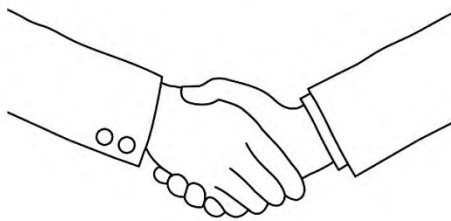


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Collaboration Opportunities

- 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



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Other Collaboration Opportunities

- Broaden & Diversify Support
 - Closer understanding of local markets and need
 - More strategic marketing and better communication
 - 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”



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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 provides an effective level of mobility, meets customer needs and offers 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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BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #3: Funding Overview



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Funding



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Funding Presentation Overview

- RTA Funding Programs
 - Operations
 - Capital
- MBTA Funding Programs
- Transit Funding in Other States



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RTA Operating Funding

- State Contract Assistance
- Federal Transit Administration (FTA)
- Local Assessments
- Farebox Revenue
- Reimbursements (third party)
- Other Revenue (advertising, parking, sale of capital assets, and interest income)



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RTA Operating Funding

- Most RTA Funding is from four major sources:

	Total	Percent
State Contract Assistance	\$59.2m	39%
Federal Transit Administration (FTA)	\$36.8m	24%
Local Assessments	\$28.0m	18%
Farebox	\$20.1m	13%
Other Revenue	\$5.2m	3%
Reimbursements	\$2.3m	2%
Total	\$151.4m	

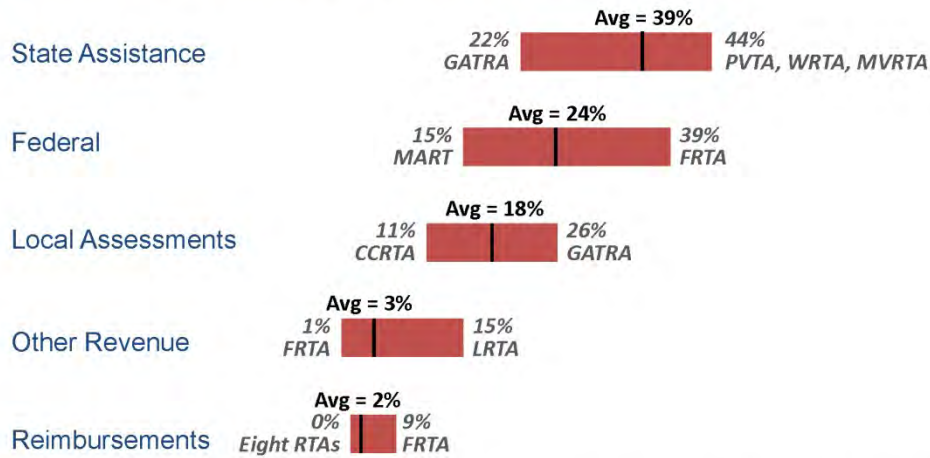
Source: MassDOT Approved Budget in Net Cost of Service FY 2012, MassDOR Cherry Sheet FY2012

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RTA Operating Funding

■ In terms of averages, highs, and lows:



5 Source: MassDOT Approved Budget in Net Cost of Service FY 2012, MassDOR Cherry Sheet FY2012



Net Cost of Service

■ Net Cost of Service is operating costs not covered by:

- RTA generated income (farebox, reimbursements, advertizing, etc.)
- FTA funds (5307, 5311, 5316, 5317, etc.)

■ Net cost of service funded through:

- State contract assistance
 - Provides at least 50% and up to 75% of an RTA's net cost of service
- Local assessments



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State Contract Assistance Sources

■ Commonwealth Transportation Fund (CTF)

- 1.25% of the state sales tax (5% to 6.25% increase)
- By law MassDOT must transfer no less than \$15 million annually
- RTAs budgeted \$15 million for FY2012

■ Massachusetts Transportation Trust Fund (MTTF)

- Funded through Turnpike and Tobin Bridge tolls
- First portion of MTTF goes to debt service, the remainder to MassDOT
- MassDOT allocates remaining funding to RTAs at discretion
- RTAs budgeted \$44 million for FY2012

Source: Mass General Laws Ch 6, 29, & 161B

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State Contract Assistance Allocations

■ State contract assistance allocations generally reflect historical distributions

■ Distributions are 12 months in arrears

- RTAs borrow money to pay for operations until state contract assistance funds are received (largely through use of Revenue Anticipation Notes (RANS))

■ Borrowing:

- Requires interest payments that increase operating costs
- Create uncertainty that makes budgeting more difficult

- MassDOT estimates additional \$70 million needed to shift RTAs to forward funding

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Local Assessments & Allocations

- Represent community contributions for service
 - Locals assessment payments are made via state aid disbursements to cities and towns (amounts deducted from annual state aid)
- Local assessments are based on service amounts and types
 - Increases for new services based on local share of actual costs in year one
 - Annually adjusted by CPI, not exceeding 2.5% per year
 - Exceptions are when communities increase or decrease service
- Local assessment distributions are 24 months in arrears
 - Creates significant barrier to starting new service (operating costs in year one; funding in year three)

Source: Mass General Laws Ch 161B



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RTA Operating Funding Issues

- State Contract Assistance and Local Assessment funding levels based on historical levels rather than current need
- Majority of operating funding is provided in arrears:
 - State Contract Assistance 12 months
 - Local Assessments 24 months
- Funding in arrears creates numerous problems:
 - Requires borrowing that increases operating costs
 - Makes budgeting difficult (easier to deal with funding changes in current year than after the money has been spent)
 - Difficult to start new service/experiment



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RTA Capital Funding

- RTA Capital Programs largely funded through:
 - Federal (FTA) funds (≈80%)
 - State funds (≈20%)
 - Limited local funding for capital
- State capital funds are generally distributed by MassDOT:
 - As block grants based on fleet size and value
 - Spending decisions largely made by individual RTAs
 - Toll credits have been used for state match
 - Existing program is temporary. MassDOT is transitioning to asset management approach.



RTA Capital Funding

- Federal formula funds are distributed:
 - Using formulas that are based on size (urban, small urban, rural, etc), revenue vehicle miles, passenger miles, and population density
 - To designated recipients in urbanized areas with more than 200,000 residents. In these areas (the MBTA for Boston) the designated recipient controls how the funding is used.
 - To the Governor's representative (MassDOT) for small urban and rural areas. MassDOT controls how the funding is used.
- Federal discretionary funds largely distributed by earmarks.





RTA Capital Funding Issues

- MassDOT distributions of state and federal funding generally based on fleet size and value rather than current need
 - Fleet size currently a proxy for relative RTA capital needs, with plans to transition to asset management based capital funding allocation
 - Use of fleet size does not adequately cover facility needs
- MassDOT requires that capital funds be spent in fiscal year awarded (even though FTA allows use of federal funds over a multi-year period)



MBTA Funding Programs

- Operating Funds include:
 - FTA Funds
 - State Funds
 - Farebox revenue and other revenues
 - Advertisements, parking, etc
 - Local Assessments
- Capital Program includes
 - Federal funds (including funds that RTAs not eligible for)
 - State assistance
 - Authority bonds





MBTA Operating Funds (2011)



Source: MBTA Operating Budget Summary FY2011

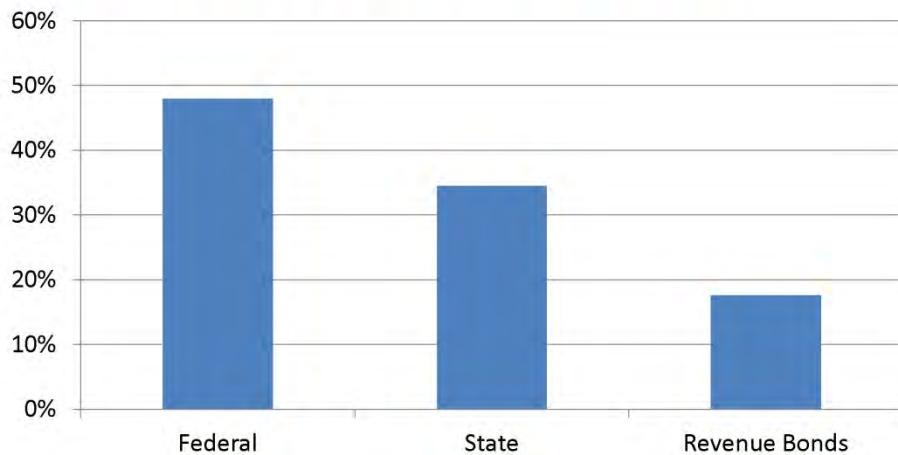


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MBTA Capital Program (2012)



Source: MBTA Capital Investment Program FY2012-FY2016; excludes Federal ARRA funding in 2012, but includes state Big Dig commitments

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MBTA Funding

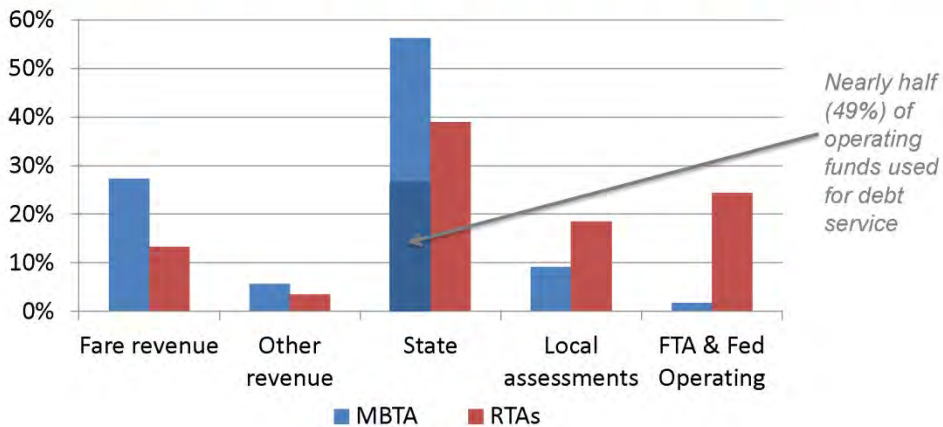
■ MBTA has forward funding

- 20% of sales tax revenue is dedicated to MBTA
- Sales revenues have fallen short of historical levels and projections (3% annual growth) since Forward Funding was initiated in 2000
- To make up for shortfalls, Legislature appropriated \$160 mil from CTF for MBTA in FY2009, MBTA has received additional \$160 mil per year since

■ Recession and slow growth has challenged Forward Funding model



MBTA vs. RTA Operating Funds by Source

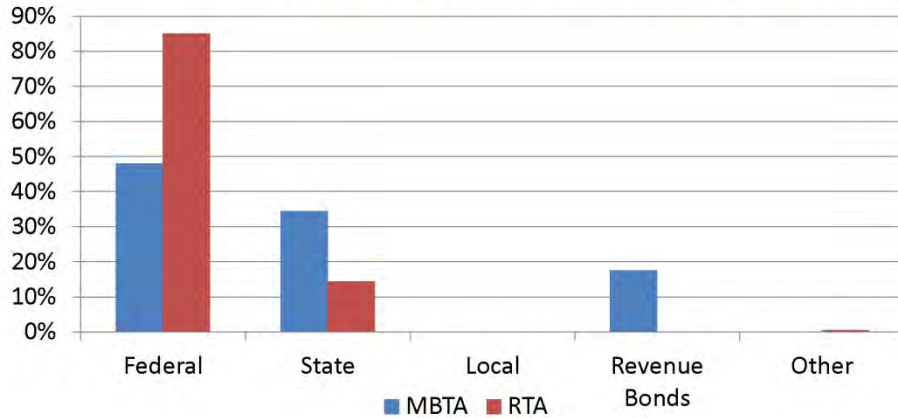


Note: MBTA not eligible for most FTA operating assistance

Source: MBTA Financial Statements 2010 & MassDOT Approved Budget in Net Cost of Service FY2012



MBTA vs. RTA Capital Funds by Source



Source: National Transit Database 2010, MBTA Capital Investment Program FY2012-FY2016

(1) RTA bars exclude non-federally recognized RTAs (FRTA & NRTA)

(2) MBTA excludes ARRA capital funding, but includes state Big Dig commitments

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Best Practices

- States with similar levels of transit funding
- Alternative approaches to at managing funding programs
- Best Practice States
 - New York
 - Pennsylvania
 - Minnesota
 - Connecticut
 - Vermont

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New York Operations Funding

- **State Operating Assistance Program (STOA)**
 - Pays systems \$0.405 per passenger carried and \$0.69 per vehicle mile driven
 - Majority of funding does not require local contribution
 - Has been stable funding source
- **Agencies report statistics to NYSDOT**
 - Statistics must be reported quarterly to state
 - If no reports filed; payments held and can be re-distributed
- **Performance Evaluation**
 - Large agency get annual performance audit
 - Large = 1m revenue vehicle miles or 1 m passengers



New York Capital Funding

- **Dedicated Capital Funding (for non-MTA):**
 - **State Dedicated Fund (SDF) - \$21m in SFY10-11**
 - Money for capital needs of non-MTA transit providers
 - Projects identified in a needs analysis
 - Systems are allocated funds based on their level of state-of-good repair and normal replacement needs
 - Primarily used to match federal resources for capital purchases (80% fed / 10% SDF / 10% local)



Pennsylvania

- 2007 instituted formula based funding program
 - Based on vehicle hours, miles, and passengers
 - Plus premium for seniors
 - Requires 15% of local match
 - Sets growth caps and holds harmless (no system gets less funding than prior year)
 - Includes mandated process for performance review
- Capital projects programmed statewide
 - Asset Improvement Program – Discretionary
 - Capital Improvement Program – Formula
 - New Initiatives (fixed-guideways)

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Minnesota

- Generous support of transit
 - State and federal funding accounts for 80-95%
- By statute, local governments are required to participate in transit funding
 - Amount reflects service type and community size and characteristics
 - 95% of Minnesota's counties have transit service
- Uses peer system to monitor system performance

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Connecticut

- Conn DOT holds service contracts
 - Oversees and manages service
 - New services negotiated based on need and resources
 - Very limited local investment
- State also manages fleet and transit investments
 - Fleet inventory kept by state
 - Replacements programmed based on standards
 - Other capital purchases done at state level
 - Locals share management of stops, signage and shelters with Conn DOT

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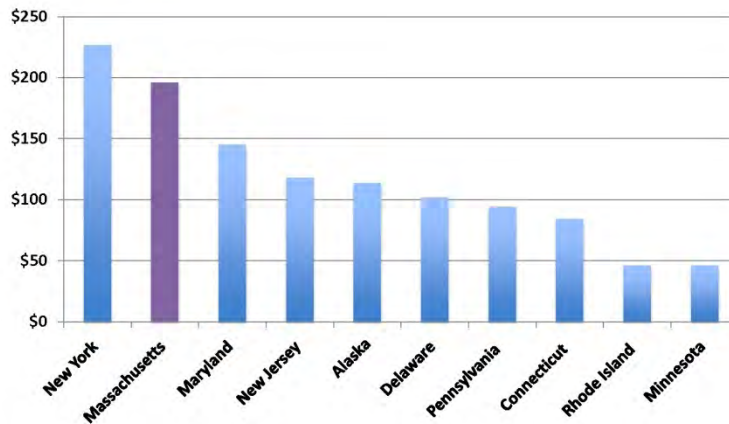
Vermont

- Operating Funds
 - Distribution primarily based on historical allocations
 - Adopted formula but never implemented it
 - Distributions increase based on successful grant funded service
 - Policy goal for 20% local contribution (including fares)
 - Actual contributions range from 4% - 25%
- “New Starts” Demonstration Program
 - Competitive grant for new services
 - Pays roughly 30% of operating costs (20% local funds)
 - If successful, service is eligible for continued funding
 - Funding amounts vary by year

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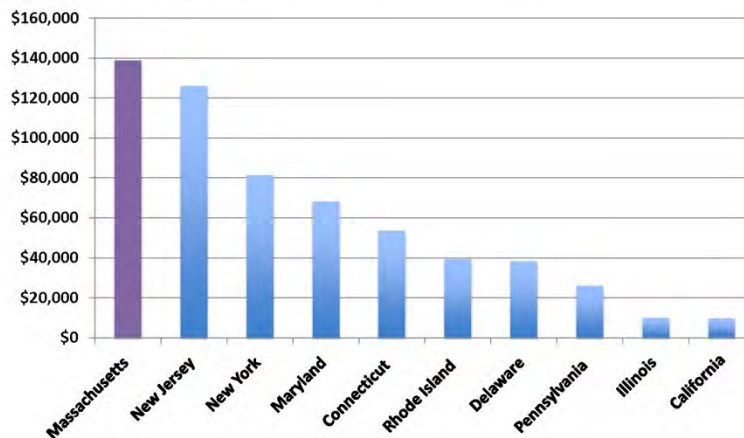
State Transit Funding per Capita Top 10 States - 2009



Source: Survey of State Funding for Transportation, AASHTO, 2011



State Transit Funding per Square Mile Top 10 States - 2009



Source: Survey of State Funding for Transportation, AASHTO, 2011





Advisory Committee Meeting #3: Next Steps



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH

Next Steps



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH



Next Steps: Funding

- Identify potential ways to transition to forward funding
- Evaluate best practices and identify options
 - Funding allocation methods
 - Performance metrics
 - Incentives
- Identify potential new funding sources:
 - Higher fares for new service
 - Partnerships (for example, with universities and local agencies)
 - Other





Next Steps: Cost Efficiency and Innovation

■ Identify and evaluate ways to improve efficiency

- Contracting best practices
- Alternative service options
- Better use of technology
- Partnerships (to eliminate duplication of effort)
- Opportunities to share skills and expertise
- Best practices among RTAs
- Other



Next Steps: Service Effectiveness

■ Identify and investigate ways to:

- Better match services with demand
 - Conduct periodic comprehensive service evaluations
 - Implement ongoing service evaluation process
 - Encourage innovation/experimentation
 - Implement performance standards
- Make service easier to use
 - Improve service design
 - Improve public information
 - Better integrate fares
- Provide a more seamless statewide transit experience
 - Branding
 - Fares
 - Joint information





Next Steps: Collaboration

- Identify and investigate ways to improve collaboration:
 - Identify legislated roles and responsibilities
 - Identify potentially desirable roles
- Identify ways to improve communications
- Identify potential new and alternative roles
 - Partnerships
 - Technical assistance



Other Next Steps

- Develop Evaluation Framework
 - (cost impact, implementability, service improvement, etc.)

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #3 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: December 19, 2011, 10:30 PM –1:30 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Carolyn Brennan, East Longmeadow Council on Aging

Matt Ciborowski, MassDOT, Office of Transportation Planning

John Englert, MassDOT

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

Mary MacInnes, Pioneer Valley Transit Authority

Bill McNulty, Old Colony Planning Council

Tom Narrigan, First Transit

Richard O'Flaherty, ATU Brockton Local 1547

Stephen O'Neil, Worcester Regional Transit Authority

Charles Planck, MBTA Office of Strategic Initiatives and Performance

Tanja Ryden, Executive Office of Health and Human Services

James Scanlon, Lowell Regional Transit Authority

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Nancy Farrell, Regina Villa Associates

Agency/Public:

Lynn Ahlgren, MWRTA

Jeannette Orsino, MA Association of Regional Transit Agencies (MARTA)

Mohammed Khan, Montachusett Regional Transit Authority (MART)

Paula Leary, Nantucket Regional Transit Authority

Erik B. Rousseau, Southeastern Regional Transit Authority (SRTA)

PURPOSE/SUBJECT: This was the third meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included a report on non-RTA stakeholder interviews; a discussion of the project vision and study goals; a preliminary evaluation of funding issues; and a discussion of the next steps for the project.

HANDOUTS: Agenda

Introductions and Update on Recent Activities

Scott Hamwey, Project Manager for the Massachusetts Department of Transportation (MassDOT), Office of Transportation Planning, welcomed the participants. He invited those present to introduce themselves (see Attendance). Mr. Hamwey reviewed the meeting agenda. He said the team will be reporting on interviews with external stakeholders that were conducted since the last meeting; wrapping up the discussion of the vision and goals statement; identifying approaches for collaboration and discussing funding issues; and presenting models and best practices from other states.

Mr. Hamwey recognized Steve O'Neil from the Worcester Regional Transit Authority for a comment. Mr. O'Neil said that after the last meeting he and RTA colleagues discussed some concerns about where the process is going. The Advisory Committee participants would like to review materials in advance of the meetings so they can be better prepared to respond appropriately. There is concern about some of the information being presented and the need for the RTA representatives to discuss the issues among themselves to respond at the meetings.

Mr. Hamwey said the presentations to date were reporting on interviews and the team was not able to send them out in advance. During the last meeting, there was a robust discussion of a mission statement and goals, and materials were sent to the participants for further review. As the work moves from reporting on existing conditions to opportunities to address issues he should be able to send the materials to the participants in advance. He asked for patience as this task is completed.

Mr. O'Neil said that the RTA representatives would like to be able to review the materials in advance so they can voice concerns, ideas and thoughts at the meetings. Mr. Hamwey said the team will do its best to provide the presentations in advance.

Results of Non-RTA Interviews

Anne Galbraith, ASG Planning, outlined the additional stakeholder interviews and results. There were conversations with staff at MassDOT, the MBTA, Councils on Aging, contractors, union representatives, First Transit, MassPIRG, Regional Planning Commissions, Bus Riders United and various state agencies. The team will interview MARTA early in January. These interviews were more open-ended than the RTA versions and included wide-ranging viewpoints, some aligning with the RTA opinions and some contrasting.



Ms. Galbraith said transit operations and service design, partnerships, funding and vision suggestions were the dominant topics. With regard to operations, most respondents said that the RTAs are good at providing service, running clean buses, keeping service on-time and maintaining generally good labor relations. Those interviewed felt some of the RTAs are not as strong with regard to service design, can be slow to respond to new or evolving markets, and/or have not always been willing to try new service options or pursue other innovations. Those interviewed also acknowledged that transit is a complex business with a great deal of specialization and limited staff resources. They suggested the need to develop greater technical capabilities and to better use existing technical resources, including the Regional Planning Commissions (RPCs). There were suggestions to take advantage of resources available from the MBTA. Other ideas included creating Centers of Excellence at individual RTAs to benefit all of the RTAs. Rewarding innovation was also proposed.

During the interviews there were a number of comments regarding collaboration. It was noted that RTAs collaborate well at the local level but appear to be more independent of state and federal agencies, who could serve as a resource. The MassDOT – RTA relationship appears to be a complex one. Many observed that the state and RTAs should be partners, but there is a need for more leadership from the state, as well as a need for mutual respect. Communication should be strengthened and the interviews suggested there is willingness to change on the part of both entities. Some interviewees thought that the MassDOT –MPO/RPC relationship could be a model for change, helping bring a stronger emphasis on transit to the

Statewide Transportation Plan. The Human Service Transportation Office is a possible model. Collaboration should be improved all around, among all of the transit parties.

Looking at other opportunities for collaboration, those interviewed suggested broadening and diversifying support with the goal of developing a better understanding of local markets and need (e.g., with seniors, immigrants, those involved with social services and with regard to supporting economic development). More RTA to RTA development could foster cross-pollination of ideas, and strengthening relationships with state and federal agencies could help by sharing information, including best practices. An Advisory Committee member suggested that RTAs already collaborate quite extensively and Ms. Galbraith clarified that the suggestion was to better identify and share best practices across the state.

Those interviewed said that the RTAs appear to manage their budgets and cash flow well. While there is a need for funding, funding mechanisms could also be improved. Several suggested that the level of state funding for regional transit is underappreciated and that MA RTAs are in better shape than peers in other states. They suggested looking to local sources for funding increases, although that may be a challenging idea in the current economy.

A mechanism is needed to address funding uncertainties. Suggestions made included an end to arrears funding and setting up minimum funding levels. In addition, there shouldn't be a mismatch between federal and state spending time limits. Other suggestions included linking funding with performance metrics; making the funding process fair and easy to understand; and rewarding productivity, efficiency and innovation.

Finally, on the topic of vision, those interviewed suggested adapting service to serve core markets and changing service as markets change. There was a variety of other suggestions, although these objectives were not as clear. They included increasing productivity, expanding coverage and encouraging economic development.

Vision Statements and Study Goals

Ms. Galbraith reminded the committee members of MassDOT's vision statement:

Leading the Nation in Transportation Excellence



She read the proposed statewide transit vision statement, which was distributed to the committee after the last meeting:

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.

Mary Ellen Blunt suggested that the word “statewide” be added before the word “network.” Ray LeDoux expressed some concern about the definition of markets in the statement. Geoff Slater said that each RTA determines its own market; there is no one size fits all intent or determination in the statement. There was another comment about the word “effective” and a concern that it represents a metric. Mr. Slater replied that some states provide a definition and the team can review that idea, but there is no specific metric envisioned in the statement at this time.

There was a discussion about the challenges in finding a balance between sometimes competing goals. Some of the examples included balancing serving the largest number of transit riders versus providing a little bit of service everywhere; balancing equity versus efficiency. Mr. Slater said that most RTAs implicitly make a choice for either demand-based or coverage-based service and each RTA and region has to figure this out. One goal of the study is to develop a framework for RTAs to make these decisions explicitly and acknowledge tradeoffs that may result. The study’s goal is not to prescribe what each RTA should do and this is why the vision should not attempt to specifically define mobility goals.

Mr. LeDoux asked if the team will look at contracts. Mr. Slater said he is, but more from the viewpoints of looking at uniformity and best practices than anything else. Mr LeDoux said that by statute RTAs are “purchased transportation” but in reality many function as directly operated service. Chris Anzuoni, from the Plymouth and Brockton Street Railway Company noted that from the contractor’s point of view the more uncertainty and vagueness in the contract, the higher price. Mr. Slater said the team will keep these ideas in mind and reiterated that the team is looking at contracts with the goal of understanding how they work and identifying new ideas and best practices.

Emerging Study Goals

Based on all of the interviews, Ms. Galbraith said the team developed a framework of four topic areas for organizing the data and exploring recommendations: **funding; cost efficiency; service effectiveness; and collaboration.** The information and interview data collected to date is being used to help define study goals within these topic areas. A discussion of emerging study goals ensued.

Funding includes potential ways to transition to forward funding; evaluating best practices and evaluating options; and identifying potential new funding sources. Under cost efficiency, new approaches could include alternative service options, better use of technology, partnerships, and contracting best practices. Service Effectiveness topics and suggestions listed are better matching services with demand; making service easier to use; and providing a more seamless statewide transit experience. Collaboration covers ways to improve communications and identify potential new and alternative roles. Next steps are to develop an evaluation framework for these topics.

Mr. O’Neil suggested adding the word “equitable” to the funding category. He said that the term “cost efficiency” implies that the RTA’s are not being efficient and suggests they can do more. He said that RTAs have been working against a lot of pressure that they are cost effective. Other speakers agreed that the implication is not positive. Ms. Galbraith said that there is always room for improvement in any system and that’s the only message in the title. The title reflects the comments the team heard and is not a judgment of the RTAs. Angela Grant concurred with Mr. O’Neil; she said audiences who look at this presentation – including legislators – might conclude that the RTAs are not efficient. Mr. Slater said if the RTAs looked back a few years and compared their effectiveness then and now, they would probably find that they are more cost efficient now. The idea is to find ways to share best practices and new management strategies, not to imply that RTAs are not efficient. In fact, most of the stakeholders



interviewed believe that RTAs are efficient. Jeannette Orsino said the state has not provided any new resources for RTAs. John Lozada suggested that the public is not included in the equation and needs to be part of the collaboration. Ms. Blunt asked about the gaps in service and if the study will identify and seek to fill them. Mr. Slater said the study could develop a process for identifying the gaps but it will not actually seek to identify and fill them. Many states do require an evaluation of transit services on a regular basis; so one outcome of the study could be to establish such a process or framework, but the team will not actually implement it. Charles Planck suggested that the title of the slide was perhaps erroneous; it should be called Emerging Study Finding Categories since it is an organizing structure for the interviews. Mary MacInnes – referring back to the vision statement – suggested that “sufficient” or “adequate” should be added to “funding.” Ms. Galbraith said the team would consider these comments and recirculate the material for review.

Funding

Geoff Slater, Nelson\Nygaard, presented information about RTA, MBTA and other transit funding. RTA operating funds are derived from state contract assistance; the Federal Transit Administration (FTA); local assessments; farebox revenue; third party reimbursements and revenue from advertising, parking and other sources. RTA's receive their major funding from the state contract, FTA, local assessments and fares. There was some discussion about the actual percentages, and Mr. Slater showed a bar graph indicating the funding distribution by RTA and source of income. Average figures are 36% from state contracts; 26% from the FTA; 18% from local assessments; 4% from other revenue; and 2% from reimbursements.

The net cost of service is funded through state contract assistance (at least 50% and up to 75% of an RTA's net cost) and local assessments. FTA funds are available through a variety of source programs. The FY 2012 budget is approximately \$60 million.

The state's income sources include the Commonwealth Transportation Fund (CTF); in 2012, RTAs received \$15 million from this fund. The Massachusetts Transportation Trust Fund (MTTF) receives monies from the Turnpike and Tobin Bridge tolls. The first portion of these funds goes to debt service, and the remainder goes to MassDOT. In 2012, RTAs received \$44 million from the MTTF.

Mr. Slater said that state contract assistance allocations tend to reflect historical distributions, and they are 12 months in arrears. The RTAs borrow to pay for operations until the state funds are received. Borrowing interest costs increase operating costs and this system creates uncertainty, which makes budgeting more difficult. MassDOT estimates that \$70 million would be needed to shift RTAs to forward funding. There was some discussion of this figure and whether it would eliminate the need for revenue anticipation notes.

Mr. Slater said that local assessments are made via disbursements from state aid to cities and towns. They are based on service amounts and types and they are 24 months in arrears.

Summarizing operating funding issues, Mr. Slater said that both are based on historic levels versus current need and the majority of operating funding is provided in arrears (between 12 and 24 months after expenditures). This system creates a number of problems, including requiring borrowing that increases costs; making budgeting difficult; and making it difficult to start new service or fund innovation.

RTA capital programs are funded by a combination of FRA (80%) and state funds (20%). Only limited local assessments go toward capital improvements. MassDOT disburses its capital funds based on fleet size and value and as block grants, with spending decisions largely made by each RTA. Ms. Slater said that the federal funds are distributed based on size of the RTA (urban, rural, etc.), revenue vehicle miles, passenger miles and population density. For large urban areas (more than 200,000 residents), FTA funds are controlled by the recipient (the MBTA in MA); in smaller rural and urban areas, the Governor's

representative (MassDOT) controls the funding. Discretionary federal spending is distributed through the earmark process.

Mr. Slater and John Englert pointed out some issues arising from the funding system. The distribution of capital funds depends largely on fleet size, not need, and fails to cover facility needs. There is also a disconnect between the spending requirements: MassDOT requires spending capital funds within the fiscal year, while federal funds can be spent over a multi-year period. Mr Englert pointed out that the current capital funding program is a 'stopgap' program and the state is actively looking at new ways to developing an asset management program.

Mr. Slater provided information on the MBTA's funding programs for comparison. The MBTA's operating funds are derived from FTA, the Commonwealth, farebox and other revenues and local assessments. Mr. Slater said the MBTA, unlike many RTAs, cannot use federal funds to operate service. Several members of the committee pointed out that the MBTA can use a small portion of Section 5307 as well as some preventative maintenance funds for ADA service and other operating expenses. Mr. Slater agreed with the group.

MBTA's capital program is funded by the FTA (programs that RTAs do not qualify for); state assistance; and bonds. In 2011, of its \$1.6 billion in operating funds, the MBTA received a very small amount of federal funding; the majority of operating funds came from fare revenues (28%) and state funds (more than 50%). The capital program for 2010 depended on federal grants (about 45%); state funds (about 13%); and bonds (about 42%). There was some question about whether CA/THF funds are included in these figures at all, which the team will look into.

One of the main differences in funding between the MBTA and the RTAs is that the MBTA now has forward funding. 20% of the state's sales tax revenue is dedicated to the MBTA. While this is a popular method of funding in the U.S., it is problematic when revenues fall short as they have been during the current economic recession and recovery. To make up for the shortfall, the Legislature appropriated \$160 million for the MBTA in FY 2009 and every year since. Recession and slow economic growth have challenged the forward funding model. Some states have had to cut service much more severely than the MBTA, which has benefited from state fund contributions during this period. Ms. Orsino pointed out that RTAs have been level funded during this time.

Mr. Slater showed two sets of graphs comparing MBTA and RTA funding sources for operating and capital funds. He noted that the MBTA uses nearly half of its operating funds for debt service (compared to about 35% for RTAs). On the capital side, the MBTA receives some funds that RTAs are not eligible for, such as New Starts. RTAs get about 80% of capital funds from federal programs and 20% from the state.

Bethany Whitaker, Nelson\Nygaard, presented some Best Practices from New York, Pennsylvania, Minnesota, Connecticut and Vermont. The goal of the review was to identify states with similar levels of transit funding and look at alternative approaches to managing funding. In New York, the State Operating Assistance Program (STOA) pays transit systems \$0.405 per passenger carried and \$0.69 per vehicle mile driven. The majority of this funding does not require a local contribution and STOA has been a stable funding source. Transit agencies must report their statistics to NYSDOT on a quarterly basis; if there is no submittal, payments can be held and redistributed. Large agencies participate in an annual performance audit (more than \$1 million in revenue or 1 million passengers).

On the capital side, there is a State Dedicated Fund (SDF) for non-MTA transit, which was funded with \$21 million in SFY2010-2011. Projects are identified using a needs analysis and systems are allocated funds based on their level of state-of-good repair and replacement needs. The funds are used primarily to match federal resources for capital purchases at a rate of 80% federal, 10% SDF and 10% local.

Pennsylvania instituted a formula-based funding program in 2007. It is based on vehicle hours, miles and passengers and provides a premium for senior service. The program requires a 15% local match. It sets

growth caps and holds agencies harmless so no system receives less than it did the prior year. There is also a mandated process for performance reviews. Capital projects are programmed statewide with a discretionary asset improvement program; a formula for capital improvements; and a process for new initiatives.

Minnesota provides generous support for transit. State and federal funding account for between 80 and 95% of costs. By statute, local governments are required to participate in transit funding. The state uses a peer system to monitor system performance.

ConnDOT holds service contracts, and it oversees and manages service. New services are negotiated based on need and resources. There is very limited local investment. The state also manages fleet and transit investments. Vermont distributes operating funds primarily based on historical allocations. Distributions increase based on successful grant-funded service. The state has a goal of 20% for local contributions (including fares), and actual contributions range from 4 to 25%. There is a “New Starts” demonstration program, which is a competitive grant for new services. This program pays roughly 30% of operating costs. If successful, a service is eligible for continued funding.

Ms. Whitaker showed data on state transit funding per capita and per square mile for the ten top states in 2009. MA ranked first on the square mile criteria (where density is a factor) and second on the per capita. Ms. Blunt asked the team to generate figures for non-MBTA providers with their local contributions included.

Next Steps

Mr. Slater said the team will take the information from the presentation and discussion and begin to look at funding sources, higher fares, potential partnerships and other opportunities. He encouraged the participants to follow up with Mr. Hamwey on any concerns or suggestions.

Mr. Slater and Mr. Hamwey noted the issues raised with regard to the cost efficiency category and added that the project is not intended to redesign service effectiveness for any system but to develop tools for assessing services and decisions. The team hopes to provide ways to improve the service design framework. Everyone talks about being more collaborative, so the team will seek ways to build on that good will. Developing an evaluation framework is another goal and element of the team’s work.

Mr. Hamwey suggested **Friday, February 10** for the next meeting. He anticipates that it will be more of a workshop format. In the meantime, he and the team will work on updating the presentation materials. He has just sent out a number of draft RTA profiles and asked the agencies to get back to him with any comments in a week.



Advisory Committee Meeting #4: February 10, 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #4 MONDAY, FEBRUARY 10, 2012, 10:30 AM – 12:30 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Overview of Proposed Initiatives (10 minutes)
2. Breakout Groups on Initiatives (90 minutes)
 - Overview of proposed process
 - Breakout group assignments and discussion objectives
3. Next Steps (10 minutes)
 - Review of meeting format/approach
 - Upcoming Initiatives
 - Set next meeting date
4. Public Comment (10 minutes)



Advisory Committee Meeting #4: Proposed Initiatives



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH

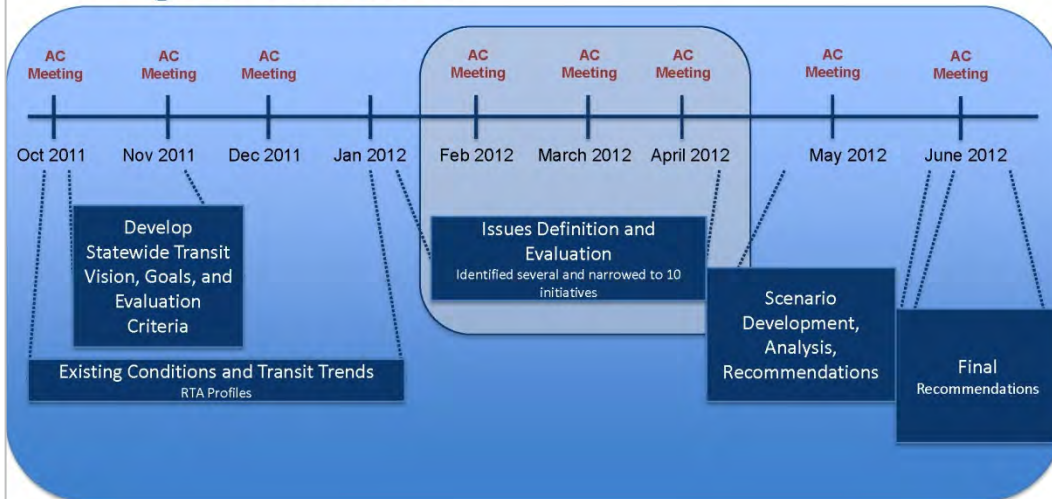
Advisory Committee Meeting #4
February 10, 2012
Worcester Union Station



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH



Project Timeline





PROPOSED INITIATIVES

- Interviews, discussions and data analysis led to a long list of potential opportunities
- List was winnowed into ten initiatives
 - Consistently identified as concerns
 - Offer potential to improve overall network
 - Reflect input from MassDOT staff and leadership
- Grouped initiatives for review by Advisory Committee
 - Service Improvement
 - Funding
 - Other



PROPOSED INITIATAIVES

- Service Improvement
 - *Develop Service Standards/Guidelines*
 - *Improve Service Planning*
 - Develop Consistent Data and Reporting
 - Enhance Public Information
- Funding
 - Improve Contracting
 - *Improve Capital Funding*
 - Identify Additional Funding
 - Develop More Effective Funding Process
- Other
 - Foster “Cross-Border” Collaboration
 - Better MassDOT/RTA Collaboration





Develop Service Standards/Guidelines

■ Issues

- Changes in demographics, and shifts in population and employment centers continue to occur; route structure remains relatively constant
- No clear/systematic approach to review service and respond to change

■ Potential Solutions

- Development of minimum statewide standards for each RTA type
- Development of local service standards by each RTA

■ Best Practices

- MA: MBTA, MART, WRTA (examples of internal RTA guidelines)
- Nationally: CA, MN, PA and VA among 75% with statewide standards

Outcome: Aid in identifying opportunities to provide more efficient and effective service, tool in advocating for increased funding, meet Chp 25 requirements



Improve Service Planning

■ Issues

- Many RTAs do relatively little comprehensive service planning
- Too much focus on status quo - not enough innovation

■ Potential Solutions

- Develop a formalized systemwide service planning process
- Implement a formalized, ongoing service evaluation process

■ Best Practices

- MA: CCRTA, GATRA, WRTA, LRTA
- Nationally: FL, VA, WA

Outcome: Create more effective transit services that best match need and demand





Improve Capital Planning

■ Issues

- Needs determined locally, so highest-need projects from statewide perspective are not always funded
- Insufficient in-house technical capabilities for major projects

■ Potential Solutions

- Develop a statewide capital planning process
- Introduce an asset management system for RTAs

■ Best Practices

- MA: MBTA CIP
- Nationally: VA, NY, PA (statewide capital plans and asset mgt)

Outcome: A system to better match capital investment with need, resulting in the more consistent development and replacement of capital assets throughout MA



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Break-Out Group Discussion

■ Divide into 3 groups

- Facilitator is assigned to each group

■ Spend 15-20 minutes per topic

- Focus on constructive guidance
- Respect everyone's opinions and view points
- Ensure everyone has opportunity to speak

■ Report back after each topic is discussed

- Facilitator will do reporting

■ Technical advisors (Geoff and Anne) available to answer questions as needed

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Break-Out Group Discussion

- What do you like/don't like about initiative?
- How could this be applied to Massachusetts?
- What are the challenges associated with getting this done?

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Next Steps

- Review Meeting Format
 - What did you like/dislike about meeting format?
 - Ideas for improvement?
- Schedule Next Meeting Date
 - Friday, March 23rd?

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BEYOND BOSTON – ADVISORY COMMITTEE MEETING #4 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: February 10, 2012, 10:30 PM –1:00 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Carolyn Brennan, East Longmeadow Council on Aging

John Englert, MassDOT

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

Mary MacInnes, Pioneer Valley Transit Authority

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Richard O'Flaherty, ATU Brockton Local 1547

Stephen O'Neil, Worcester Regional Transit Authority

Charles Planck, MBTA Office of Strategic Initiatives and Performance

Tanja Ryden, Executive Office of Health and Human Services

James Scanlon, Lowell Regional Transit Authority

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Regan Checchio, Regina Villa Associates

Kate Barrett, Regina Villa Associates

Other Attendees:

Lynn Ahlgren, MWRTA

Jonathan Church, CMRPC

Jeannette Orsino, MA Association of Regional Transit Agencies (MARTA)

Mohammed Khan, Montachusett Regional Transit Authority (MART)

Bill McNulty, Old Colony Planning Council

Gary J. Pfres, Southeastern Regional Transit Authority (SRTA)/ATU

Erik B. Rousseau, Southeastern Regional Transit Authority (SRTA)

Gary Shepard, BRTA

PURPOSE/SUBJECT: This was the fourth meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included breakout discussions of three of ten initiatives being evaluated as part of the study.

HANDOUTS: Agenda

Welcome

Kate Barrett, Regina Villa Associates, opened the meeting and explained that she was serving as the moderator of the Study Advisory Committee meeting.

Mohammed Khan, Montachusett Regional Transit Authority (MART), objected to the meeting format and said that RTA administrators who are not members of the Advisory Committee should be able to participate in the meeting instead of holding comments until the public comment period. Ms. Barrett noted his objection and then introduced Scott Hamwey, Project Manager for MassDOT.

Overview of Proposed Initiatives

Mr. Hamwey announced that John Englert, MassDOT, is leaving his position with the state and thanked him for his service.

Mr. Hamwey then gave a brief presentation, first reviewing the project schedule. Mr. Hamwey noted that a document summarizing ten proposed initiatives based on the stakeholder interviews and Best Practices was sent to the Advisory Committee two weeks before the meeting. Mr. Hamwey said that this document was a draft and he had received feedback on the document. Some participants felt that the project team could have done a better job crediting examples of local successes on these initiatives. He encouraged Advisory Committee members to call or email him with additional feedback.

Mr. Hamwey then reviewed the initiatives, organized into 3 categories:

Service Improvement

Develop Service Standards/Guidelines

Improve Service Planning

Develop Consistent Data and Reporting

Enhance Public Information

Funding

Improve Contracting

Improve Capital Planning



Identify Additional Funding

Develop More Effective Funding Process

Other

Foster “Cross-Border” Collaboration

Better MassDOT/RTA Collaboration

Mr. Hamwey said that this meeting would focus on three of these initiatives – Develop Service Standards/Guidelines; Improve Service Planning; and Improve Capital Planning. Draft documents exploring these three initiatives were distributed to the Advisory Committee in advance of this meeting. Subsequent meetings will focus on the other initiatives.

Ms. Barrett explained that the Advisory Committee members would break out into pre-assigned small groups to discuss each of the three initiatives. Each group (Red, Yellow, and Green) would have 20 minutes to focus on each initiative, and would then have the opportunity to share their comments with the larger group. The intent of each discussion group was to hear the perspective of all committee members on which of the potential solutions/best practices highlighted by the team holds the most promise for helping RTAs and MassDOT address the identified issues. A secondary goal was to identify the challenges to implementing/introducing any of these potential solutions.

Stephen O’Neil, Worcester Regional Transit Authority, said that he did not think the group needed to break out. He requested that the meeting format be changed to allow a large group discussion of all ten of the initiatives sent out by MassDOT. He said that there was a feeling and sentiment among the Advisory Committee that they disagreed with many of the points in that summary document. Mr. Hamwey clarified that all three groups would address all three initiatives, and the discussion would not be limited.

James Scanlon, Lowell Regional Transit Authority, said the Advisory Committee should be allowed to decide the format of the meeting. Charles Planck, MBTA Office of Strategic Initiatives and Performance, said there were many ways to structure a meeting and the breakout approach allowed individuals more chances to participate.

Mr. Hamwey said he had distributed information about this meeting format a week before the meeting. If members had objections to this format, the appropriate time to raise them would have been in advance of the meeting, not after the team had prepared for this format. He also said that this format was designed to allow all members on the Advisory Committee a greater chance to participate, and to maximize feedback within the meeting timeframe.

Ms. Barrett said that non-Advisory Committee members were welcome to sit in on any of the breakout sessions and listen to the discussion, and would have the opportunity to comment at the end

Breakout Groups on Initiatives

Ms. Barrett reiterated the format for the breakout groups, informing the Advisory Committee that the breakout groups were pre-assigned with a facilitator also assigned to each group. The groups would be allocated 20 minutes to discuss each initiative and 10 minutes for all groups to report back. Facilitators would be responsible for reporting back for the breakout group. At the end of Ms. Barrett’s overview, the Advisory Committee went to their assigned groups and participated in the discussion of the individual initiatives.

A summary of the major themes by initiative is provided at the end of these meeting notes.



Public Comment

There were no public comments.

Next Steps

Mr. O'Neil noted that at a meeting in June 2011, Secretary Davey said that this study was not an attempt to take over the RTAs. However, it appears to be an undercurrent in the Beyond Boston study, and the RTAs remain concerned. He noted that there is a tight timeframe to complete the study (June 2012) and offered to meet more than monthly, if necessary. Mr. Hamwey suggested that perhaps conference calls might work to add opportunities to discuss as a group.

Angela Grant, Martha's Vineyard Transit Authority, suggested that this potential call involve the other RTAs not represented on the Advisory Committee. She said their input is vital. Mr. Hamwey said that might be a good approach.

Frank Gay, Greater Attleboro Taunton Regional Transit Authority, said the meetings need to be more flexible. He said that if non-Advisory Committee RTA administrators take the time to attend the meetings, they should be allowed to participate.

Richard O'Flaherty, ATU Brockton Local 1547, pointed out that as a non-RTA administrator; he is a minority on the Advisory Committee. He noted that other stakeholder groups are not necessarily fully represented on the Committee, such as organized workers, business leaders or riders. Mr. Scanlon said that any individual who takes the time to come to an Advisory Committee meeting should be included. Mr. O'Flaherty agreed that committee membership should have been expanded, but said that the format is already in place.

Mr. Gay asked Mr. Hamwey about the timeframe for comments on the 10 Initiatives document. Mr. Hamwey said that MassDOT wants to post it to the project website soon so he suggested two weeks.

Ms. Grant said that her agency does not have additional staff to review the materials and would appreciate getting draft documents as quickly as possible. She noted that the project team had done a better job in getting materials out in advance for this meeting. Geoff Slater, Nelson/Nygaard, said that the project team should be able to get information on the remaining initiatives out earlier.

The next meeting was proposed for March 23rd (but is now scheduled for **Tuesday, March 27**).

Input on the Initiatives

Initiative 1: Develop and Use Service Guidelines

Major Themes:

- Most agree that the broader use of performance statistics is a good and reasonable practice. Most also felt that the majority of RTAs already have and use service standards and guidelines, even if informal.
- While there was support for the use of service standards and guidelines overall, many individuals expressed caution over the use of minimum service standards.
 - If the state were to implement minimum service standards, there was concern about how these standards would be used. For example, if a route were found to be below the standard, it should not necessarily mean that it would be eliminated, but perhaps could be identified as a route that requires special analysis, marketing or modification.
 - Several suggested that performance standards should be used to encourage RTAs to benchmark progress and performance against themselves rather other agencies. The sense was that comparisons would create competition and ill-will between agencies.



- Performance measurements, standards and guidelines should be simple, straight-forward and easy to understand, but also flexible enough to account for local circumstances.
 - They should reflect industry standards, such as passengers per mile, passengers per hour and cost per passenger trip.
 - They should include measurements of customer satisfaction as well as service productivity, farebox productivity and performance.
- Service standards and guidelines should be oriented towards different types of service rather than RTAs as a whole.
 - One potential categorization could be by service areas and types (such as): urban (demand based); suburban (coverage based); and rural (lifeline based). Many RTAs have each of these service categories in their service areas.
 - Another approach would be for all services to use the same measures, but the expected performance could vary based on service type.
- Service guidelines should be established for both fixed-route and paratransit services.

Other Comments:

- RTAs classify costs and measure services differently. If performance measures are going to be compared across agencies, there should be an effort to define parameters, especially cost.
- There is not currently a relationship between RTAs and the Office of Performance Management and Innovation; establishing this relationship could support this effort.
- Technology will be an important tool in the ability to collect data to support service guidelines and standards

Initiative 2: Improve Service Planning

Major Themes:

- There is agreement that service planning is important and useful; this sentiment reflects agreement that there is always room for improvement and planning is essential. Most also felt that the majority of RTAs have an inherent understanding of their service areas and customer bases, and conduct some level of service planning today even if informal.
- RTAs should conduct service planning (Comprehensive Service Analysis-type) activities periodically. An appropriate time period between CSAs (or similar detailed planning studies) would be roughly every 5 to 10 years.
- Some RTAs felt there is already an inventory of good planning and while a lot of the existing planning work is focused on a specific market, it could be combined into a single document which would effectively be a CSA. The State could define a minimum set of planning objectives that would be important to achieve, and individual RTAs could conduct more detailed study, if desired.
- CSAs should document previous and planned changes in the community and how this has impacted or may impact demand. Other important elements of a CSA are:
 - An understanding and definition of the customer base, including rider needs, expectations and priorities.
 - This includes both customers in the local service area but also neighboring regions (i.e. connections between services).
 - A general analysis of community demographics and densities, including where and how a community has changed.



- A detailed review of the existing routes and services so that system strengths, weaknesses, and opportunities are identified and evaluated.
- A review/analysis what important things are not being done
- CSA efforts should include others such as the RPA, municipalities and developers
- CSAs should focus on local conditions and objectives, but broader statewide objectives should also be considered (e.g. integration of existing transit services).
- Data sources and tools to support service planning include: an analysis of transit propensity (market, census and other MPO/RPC resources), information from other transportation service providers and input from the public.
- Future plans should be locally driven. If service planning efforts are mandated by the state, they should still be hired locally, not by the state.
- If the state wants to encourage CSA type planning efforts, they should fund them.

Other Comments:

- Some members of the group felt additional planning efforts are not needed. They felt they have done the planning, know their markets, and could use the funding to get the projects underway.
- Some felt that MassDOT should offer support to RTAs that may not be effectively performing service planning today; MassDOT could help set up and guide planning studies, and provide funding and other technical assistance.
- Currently, RTAs use RPAs and internal resources to fund CSAs. This can be a strain on RPA and RTA staff, and not all RTAs and RPAs overlap.

Initiative 6: Improve Capital Planning

Major Themes:

- All RTAs should have a capital plan that covers their facilities, fleets, and passenger amenities. These plans should cover a longer-term horizon (e.g. 10 years) and be updated every 3 to 5 years.
- There was strong sentiment that capital planning is local/RTA responsibility.
- Most RTAs already regularly inventory and assess their capital equipment, conduct capital planning and have a good handle on their needs.
 - Several RTAs also felt they utilize an asset management type approach today, but it is not coordinated at the state level.
- Many participants had concerns related to organizing capital planning on a state-level:
 - Some of the concern reflects the lack of staff at MassDOT. MassDOT is culpable for the slow approval and distribution of capital funding. This impacts how quickly funds can be spent.
 - Others felt the state does not create processes that are clear, simple and transparent.
 - Many were also concerned that a state plan would create competition between RTAs.
 - RTAs used to provide longer-term capital programs to the state, but overall needs were never presented on a statewide basis.
- Many participants expressed concern related to the current allocation process for capital funding:
 - RTAs would like more time to spend the money, more flexibility about how funds are spent, and flexibility to potentially move funds between projects.
 - Several also said they would like the flexibility to move funds between RTAs. This reflects a common concern was leaving capital funds on the table.
 - RTAs should be eligible for a portion of available toll credits for capital projects



- Despite mistrust, several participants agreed closer collaboration between MassDOT and RTAs would help ensure all money is spent effectively.
- The existing capital process does not account for large, non-recurring expenditures such as major facilities and new construction.
 - Some RTAs felt they are penalized for obtaining federal earmarks for large projects; they work diligently to obtain bring federal investment to the state, but then the state cannot provide local matching resources.

Other Comments:

- RTAs felt strongly that they should be allowed to compete for outside grants. Some also felt that MassDOT should use toll credits to fund RTAs.
- In general, the transparency and efficiency of the statewide process for allocating capital funds has gotten better in the past few years.
- The lack of statewide operating assistance has had an impact on capital programs. Many RTAs use capital funds to support operations and ongoing preventative maintenance.
- There is distrust between the State and the RTAs resulting from the length of time it takes the state to issue contracts and differences between RTA and state planning cycles.
- The MPO process is not necessarily a good model for capital programming. There are many differences between capital needs from a highway perspective, as opposed to a transit perspective. Most transit capital plans are much more detailed than what goes in the TIP.
- Some felt capital funds should be categorized and allocated according to overall goals, such as the size of the system operations, system preservation, modernization, and need.
- Rural RTAs must be assured some level of dedicated capital assistance, since they do not receive direct federal capital assistance.



Advisory Committee Meeting #5: March 27, 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #5 TUESDAY, MARCH 27, 2012, 10:30 AM – 1:00 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Overview of Proposed Initiatives (10 minutes)
2. Breakout Groups on Initiatives (90 minutes)
3. Next Steps (10 minutes)
 - Review of meeting format/approach
 - Upcoming Initiatives
 - Set next meeting date
4. Public Comment (10 minutes)



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #5: Proposed Initiatives (part 2)



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #4

March 27, 2012

Worcester Union Station



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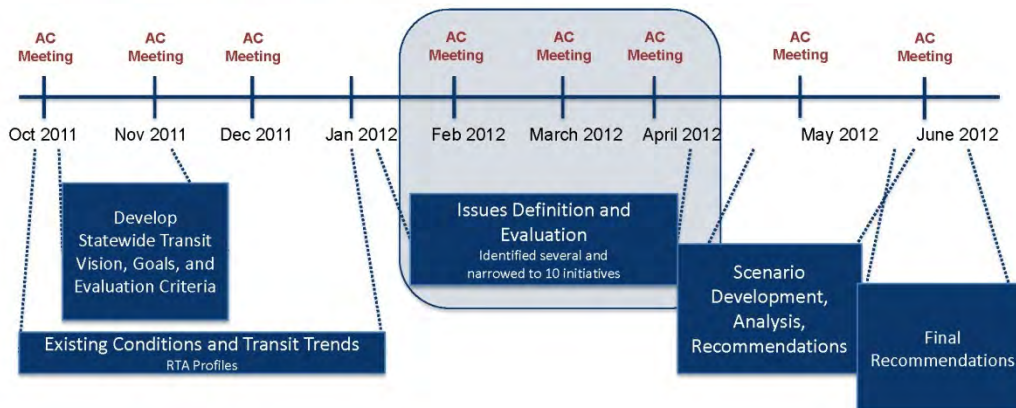


BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH



PROJECT TIMELINE



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PROPOSED INITIATIVES

■ Service Improvement

1. Develop Service Standards/Guidelines ✓
2. Improve Service Planning ✓
3. **Develop Consistent Data and Reporting**
4. **Enhance Public Information**

■ Funding

5. Improve Contracting
6. Improve Capital Planning ✓
7. Identify Additional Funding
8. Develop More Effective Funding Process

■ Other

9. **Foster "Cross-Border" Collaboration**
10. **Better MassDOT/RTA Collaboration**



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3. Develop Consistent Data and Reporting

■ Issues

- Blending of data for different service types, between RTA and HST service
- MassDOT and the public does not always have access to most current data

■ Potential Solutions

- Develop new state reporting structure, with clear guidance
- Reduce burdens of additional reporting by simplifying process
 - Consistency with NTD categories
 - Allow data to be reported in more disaggregated formats

■ Best Practices

- MA: Mass HST
- Nationally: MN, WA, OR

■ Outcome

- *Ability to accurately compare system performance to identify systems or services in need of support, as well as best practices*
- *Increase transparency of service provided thereby building stronger case for additional resources*

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4. Enhance Public Information

■ Issues

- Wide range in quality of information
- Expectations of current/potential customers continue to evolve rapidly
- RTAs do not always have resources/expertise dedicated to issue

■ Potential Solutions

- Develop guidance for minimum levels of information
- Develop statewide formats
- Technical support/assistance

■ Best Practices

- MA: NRTA, MBTA, MWRTA, NRTA
- Nationally: MetroLINK (IA/IL), ACTR (VT), CCTA (VT)

■ Outcome

- *Keep up with evolving expectations*
- *Make it easier for Commonwealth's existing and potential transit riders to understand and use RTA service*

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9. Increase Cross-Border Collaboration

■ Issues

- Much informal/ad-hoc collaboration
- More formal collaboration could expand benefits

■ Potential Solutions

- MARTA takes lead on formalizing RTA collaboration efforts
- Identify centers of excellence
- Statewide initiatives (for example, Title VI)

■ Best Practices

- MA: Assistance to SRTA, CharlieCard, CR Station management
- Nationally: WA, CA, DE/PA, IA/IL

■ Outcome

- *Increased efficiencies in delivery of service*
- *Services that better meet customer needs*

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10. Better MassDOT/RTA Collaboration

- Issues
 - MassDOT and RTAs don't work together as a team
 - Roles not sufficiently defined
 - Legal requirements not being met
- Potential Solutions
 - Increase MassDOT capacity
 - Develop transit program handbook
 - Reconvene MassDOT/RTA Council
- Best Practices
 - MA: Mass HST
- *Outcome*
 - *Better ability to get things done*
 - *More effective and more efficient service*

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Break-Out Group Discussion

- Divide into 3 groups
 - Facilitator is assigned to each group
- Spend 15-20 minutes per topic
 - Focus on constructive guidance
 - Respect everyone's opinions and viewpoints
 - Ensure everyone has opportunity to speak
- Report back after each topic is discussed
 - Facilitator will do reporting
- Technical advisors available to answer questions as needed

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Break-Out Group Discussion

- What do you like/don't like about initiative?
- How could this be applied to Massachusetts?
- What would be the most important considerations?

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Next Steps

- Last three initiatives
 5. Improve Contracting
 7. Identify Additional Funding
 8. Develop More Effective Funding Process
- Next meeting date
 - Wednesday, April 11

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BEYOND BOSTON – ADVISORY COMMITTEE MEETING #5 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: March 27, 2012, 10:30 PM –1:00 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Matt Ciborowski, MassDOT

Kyle Emge, MassDOT

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

Mary MacInnes, Pioneer Valley Transit Authority

Tom Narrigan, First Transit

Richard O'Flaherty, ATU Brockton Local 1547

Tanja Ryden, EOHHS, Human Service Transit

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Kate Barrett, Regina Villa Associates

Nancy Farrell, Regina Villa Associates

Agency/Public:

Jonathan Church, CMRPC

Joe Costanzo, Merrimack Valley Regional Transit Authority

Jeannette Orsino, MA Association of Regional Transit Agencies (MARTA)

Gary J. Pires, Southeastern Regional Transit Authority (SRTA)/ATU

Erik B. Rousseau, Southeastern Regional Transit Authority (SRTA)



PURPOSE/SUBJECT: This was the fifth meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included breakout discussions of four of the ten initiatives recommended for this project.

HANDOUTS: Agenda

Welcome

Kate Barrett, Regina Villa Associates, opened the meeting and explained that she was serving as the moderator of the Study Advisory Committee meeting. She introduced Scott Hamwey, MassDOT Project Manager.

Mr. Hamwey said the meeting would consist of review and discussion of four of the Beyond Boston initiatives in the same breakout format that was used at the last meeting. He thanked members and RTA Administrators who had provided comments on the Initiatives before the meeting. Based on these comments, MassDOT made changes to the draft texts to be discussed today:

- Initiative 3: Develop Consistent Data and Reporting
- Initiative 4: Enhance Public Information
- Initiative 9: Foster Cross-Border Collaboration
- Initiative 10: Improve MassDOT-RTA Collaboration

Mr. Hamwey invited Ray LeDoux, BAT, to make a few remarks. Mr. LeDoux said that the RTAs would like to have another discussion on the subject topics after they have had a chance to digest the recommendations. The RTAs expect they can agree on many of the proposals but they reserve the right to comment. He urged MassDOT to look carefully at the tone and presentation of any final document. Most people will only read an Executive Summary of the final document, and he would like it to include the history of the RTAs' development and to highlight the many positive accomplishments that the agencies have achieved. Mr. LeDoux said that many large city and Gateway City mayors chair the RTA Advisory Boards and exercise great care and pride in their stewardship, and he would not like the project to distract communities from moving forward on initiatives. He also noted that MARTA should not be referred to as if it were a separate body politic, but all study documents should address the RTAs individually. The report should also more fully incorporate Best Practices in the Commonwealth, such as the Interoperability Fare Project. Other examples could be provided.

Mr. Hamwey said the team is mindful of the tone and will include positive information about accomplishments and plans.

Mr. Hamwey gave a brief presentation. He showed the project timeline. The current meeting will cover four of the ten initiatives, with the last three to be discussed at an April 11 meeting. The next step will be to develop recommendations or action steps. These are likely to be a range of strategies that could be used to improve the efficiency of transit services or to offer better service to the customer. The study aims to have final documents completed by June 30, 2012. Mr. Costanzo asked Mr. Hamwey to share the timeline with the Advisory Committee.

Mr. Hamwey reviewed the initiatives to be discussed:

Initiative 3: Develop Consistent Data & Reporting. Most RTAs already report to the National Transit Database, but this information blends data for different service types, making it difficult for MassDOT to properly review data and performance. NTD data is also published more than a year after agencies report. Potential solutions to be considered include developing a new state reporting structure and clear guidance with the goal of reducing the reporting burden by simplifying the process and allowing



data to be reported in more disaggregated forms. The data will allow accurate comparisons of system performance to identify systems or services in need of support, along with best practices.

Initiative 4: Enhance Public Information. The quantity and style of public information is wide-ranging, and it is evolving rapidly. It is a challenge to predict what the public will expect in this area in the future. RTAs do not always have the resources or expertise to dedicate to this topic. Potential solutions include developing model formats; providing technical support or assistance; and replicating successful Best Practices from other agencies. Mr. Hamwey listed best practices for the RTAs to review. The goal of this work is to keep pace with evolving expectations and make it easier for current and future transit riders to understand and use RTA service.

Initiative 9: Foster Cross Border Collaboration. There is a great degree of collaboration between the RTAs today, but much of it is informal or depends on personal relationships. More formal collaboration could expand the benefits of these exchanges. This is potentially a role for MARTA, or for a set of “Centers of Excellence” or RTAs with special skills in unique areas. Statewide initiatives are an area where MassDOT could be helpful, perhaps on issues such as Title VI compliance.

Initiative 10: Improve MassDOT-RTA Collaboration. The MassDOT-RTA relationship is not well defined and this challenges the effective delivery of services and limits the opportunity to pursue new initiatives. Potential solutions include increasing MassDOT’s capacity to provide leadership and technical support; developing a transit program handbook with clear guidelines outlining responsibilities; and/or reconvening the MassDOT/RTA Council. Benefits from an improved relationship would include a better ability to solve issues and the delivery of more effective and efficient service.

Breakout Groups on Initiatives

Ms. Barrett described the format for the breakout groups; the members were pre-assigned with a facilitator. Other participants were invited to sit in on the discussions. The groups would be allocated time to discuss each initiative and 10 minutes for all groups to report back. Facilitators would be responsible for reporting back for the breakout group. At the end of Ms. Barrett’s overview, the Advisory Group went to their assigned groups and participated in the discussion of the individual initiatives.

A summary of the major and minor themes by initiative is provided at the end of these meeting notes.

Public Comment

There were no public comments.

Next Steps

Mr. Hamwey thanked all of the participants and said since the next meeting is on April 11, he will aim to have the notes and summary out to the members next week. The last three initiatives – 5, 7 and 8 – will be the subject of the meeting. The initiative reports will be sent out in advance of the April 11th meeting. He will be issuing an invitation to RTA Administrators to provide comments during a conference call, probably next week.

Breakout Groups on Initiatives

Initiative 3: Develop Consistent Data and Reporting

The GREEN Group

- Currently, RTAs can collect data differently (even though most are reporting to the National Transit Database/NTD).



- If state reporting is going to be required, directions and forms should be clearly defined and should mirror some of existing reporting requirements (or parallel the requirements set out by other entities the RTAs report to).
- A web-based reporting system that could have multiple applications, allowing data to be sorted, etc., could be a solution. RTAs should be consulted as such a system and its forms are developed.
- Reporting deadlines should consider end of year audits and other constraints (e.g., seasonal constraints at VTA, NRTA).
- Note that sometimes the operating companies do not report data in a timely manner.
- MassDOT is interested in ways to encourage timely reporting.
- The benefits of better reporting include making more appropriate comparisons and developing goals; understanding service needs, gaps and changes; and being better able to understand and interpret data over time.

The YELLOW Group

- NTD reporting can be difficult.
- For NTD, monthly reporting is easy; but aggregating and annual reporting is more difficult.
- Data is necessary and should be reported to MassDOT for a variety of uses.
- Reporting should be quarterly but broken down by month. There should be room on a reporting form to add notes.
- Reporting should be simple to start and consistent with information from earlier initiatives.
- Reporting should describe where the numbers come from (survey, counts, farebox, APC, samples).
- Don't standardize where information must come from; each RTA must use the most accurate system available to them.
- Guidance or a handbook should be provided and is needed on what and how to report information.
- The state should also be interested in customer input and feedback and the quality of service.
- Other topics to report on include - funding, spending, fleet, capital, service.

The BLUE Group

- NTD data is the data to use.
- Data sets do change.
- MassDOT used to require a Program Preview. This could be reconsidered, but in the past it kept changing too much and there was too much disaggregating.
- The reporting places an administrative burden on systems; any system needs to be designed to only have time to collect data once.
- The RTAs want to know how data will be used and what MassDOT wants data for.

Initiative 4: Enhance Public Information

The GREEN Group

- Consider the kinds of consumers you are serving, such as seasonal visitors (summer, tourists); provide streetside signs; have a useful website.
- Consider the kind of service you are offering and provide information, such as bus stop signs, shelter signs.



- Consider demographics: language, vary your type of outreach, include drivers in training.
- Develop a set of guidelines for information to be provided that can be adapted locally (for different kinds of service, urban, rural, island): stay on top of trends; consider how MassDOT can help; be mindful of federal outreach requirements.
- Consider who the information is targeting and if there should be a different message for current versus potential future customers.
- Resources are an issue: could MassDOT provide professional expertise, personnel or a standard approach that could be adapted locally?
- RTAs should use a variety of tools: kiosks, mapping information (clear and easy to use); statewide trip planner; multi-modal use information.

The YELLOW Group

- This initiative text was too specific in its analysis. Look at professional analysis or general public review for feedback on information presented take individual markets into account.
- All agreed that a base level of information is needed for all systems and should include: a system map (paper and on line); schedules (timetable and a route map); Trip Planner (Google is now used); Google Transit with stops.
- Fare and pricing information should be provided.
- Information on how to use the system is important and should be provided; system function (fareboxes, farecards) is converging over time, but most RTAs are not there yet.
- Also say where and how to catch the bus in a variety of formats.
- Provide bus stop sign information, both primary and secondary. Identifying stops on the street can be very important.
- What can MassDOT do to help?
 - Make and maintain signage (this is both important, expensive for RTAs and could be standardized)
 - Provide information in multiple languages
 - Establish a base standard of information
 - Provide real time information; share best practices, including those used by the MBTA

The BLUE Group

- Information on other transportation resources (i.e., GATRA data on mobility management) should be on websites.
- Websites should be translatable (i.e., Google Translations).
- It would be good for Mass DOT to initiate efforts but it needs to stick with the effort and someone needs to be in charge of it (e.g., a MassDOT webmaster).
- The RTAs would like to have mobile apps.
- Can 511 be a model?
- It's difficult for RTAs to market in financially constrained times.
- How can we reach people today? Word-of-mouth; websites; facilities (LED signs); print media (schedules, maps/locally distributed); community-based organizations; cell phone apps.



Initiative 9: Foster Cross-Border Collaboration

The GREEN Group

- The group discussed examples of cross-border collaboration; in some cases, it is with other RTAs (administrative and technical assistance); in other cases, it can be with other agencies, e.g., the Steamship Authority sells tickets for the VTA. RTAs provide each other with sample RFPs, use Comm-Pass and partner on bus procurements.
- Centers of Excellence could formalize these relationships. One participant noted it would be most helpful to get assistance with new trends or upcoming issues or information on mission critical systems.
- Another participant suggested collaborating on driver training, both remedial and with regard to improving customer service; RTAP provides training for paratransit; perhaps training could be combined.
- Sharing ideas is positive, but services and geographic regions are disparate so this kind of collaboration may work best on the conceptual level.
- With regard to cross-border fixed route service, it would be helpful to have a model agreement between RTAs and an idea and/or support from MassDOT to meet additional costs of such service. It would be helpful to have data on customer demand in these circumstances as well.
- There is some potential to combine repair or maintenance services.

The YELLOW Group

- All recognized that there are additional examples of cross border collaboration beyond those reported.
- There should be more coordination with non-RTA providers for all modes of transportation.
- There should be a role for Regional Planning Agencies in these programs.
- MassDOT can help with particular issues, such as providing information and guidance on new initiatives or Title VI.
- Land use and transportation planning should be coordinated.
- An example of cross-border collaboration: GATRA uses SRTA for vehicle inspections.
- There is a critical need for an Information Clearinghouse on all topics to share between agencies - MassDOT or MARTA could provide this resource
- There are many small examples of assistance/collaboration between agencies; but there is a need for a mechanism that is not necessarily relationship-based.
- “Centers of Excellence” is a good idea. This kind of center could provide information on technology, procurement and training (staff and riders).
- To improve service collaboration: a statewide transit map would help.
- It’s hard to define the need for service between RTA areas or for intercity travel. These needs must be defined better to determine latent demand, rather than responding to a small number of requests, this planning could be done by RPA’s, MassDOT or others, how this would be planned is important.
- Related to RTA ownership/management of MBTA stations - Local responsiveness is better when some level of local control.



The BLUE Group

- There is a lot of this kind of collaboration going on at all times.
- An electronic bulletin board would help (one is used within First Transit).
- BAT is putting together a portal for RTA fare consortium members, including the MBTA.
- Topics that could be a focus: training, homeland security; best practices with regard to fleet sizing, maintenance and other topics.
- It's important to identify what people are struggling with.
- This topic overlaps with the next one: MassDOT/RTA collaboration.
- How can the parties best institutionalize the informal exchanges that are going on and what is the path to that solution?
- As partners, MassDOT and the RTA have never sat back to figure out how to tie the dots together.
- MassDOT's Peer Assistance Program holds potential for this topic.
- The RTAs have considered joint purchase of health care insurance and joint fuel purchases in the past and identified obstacles which prevented these efforts from advancing.

Initiative 10: Improve MassDOT-RTA Collaboration

The GREEN Group

- MassDOT should make clearly and timely requests.
- MassDOT should follow up on requests from the RTAs.
- MassDOT needs more capacity to improve the relationship, provide support and respond to requests.
- In proposing changes, MassDOT should consider the effects they will have on the RTAs (more work, more complication, etc.). Changes shouldn't be made just because there are new staff members.
- MassDOT's practices do not encourage RTAs to improve their services or provide better services; the parties should develop incentives to do so.
- This collaboration should consider and include labor's position and potential contributions, for example, to improving service.
- The RTA Council could be a good format for improving this relationship if it is real, practical and productive; quarterly meetings would be good.
- It would be helpful to the RTAs to have a knowledgeable "go to" person at MassDOT on a number of topics, such as contracts and Title VI issues.

The YELLOW Group

- Other initiatives that are part of the study will NOT succeed unless the MassDOT/RTA/MARTA relationship is repaired.
- MassDOT Rail and Transit needs additional staff. The staff roles for added staff would need to be defined.
- The right staff members need to occupy the right role. MassDOT Rail and Transit has three primary roles – Administration, Oversight and Planning. Currently and historically, administration has been the primary function; oversight and planning should be added.
- The handbook or document could clarify these processes, and make the relationship more standardized, and less reactionary.



- The goal should be to develop repeatable data and documentation which would reduce the burden on MassDOT and the RTAs.
- Restoration of the RTA Council could: (1) identify commonalities; (2) improve standardization; (3) identify Best Practices. If other stakeholders are included in the group, the number of participants should be limited.
- MassDOT and the RTAs need a common vision of a statewide Transit Policy. Such a policy should be developed collaboratively.

The BLUE Group

- Can MassDOT and the RTAs pull in FTA for more coordinated effort? Another comment was that FTA will not get involved in local efforts.
- Previously, as EOTC, the Rail and Transit office had six or seven people on staff; if one person left, there was still continuity; now, there is only one person; each new person comes with new ideas and too much change.
- FTA is more customer-focused than regulatory driven and might be considered as a model. FTA aims to ask agencies “how can we help you get your program up and running?”
- MassDOT is structured by people, not by function. Priorities shift when personnel changes. (The Mobility Assistance Program is a good example of this.)
- MassDOT is a “black hole”; you go to whom you know.
- There may be models in MassDOT that could work better than the current arrangement with RTAs; for example, the MPO/RPC arrangement where staff are assigned to work with a few agencies consistently.
- MassDOT should think of the RTAs as individual entities, not as an association of RTAs.
- Succession planning and sustainability are important.
- This topic needs more time for discussion and exploring solutions!



Advisory Committee Meeting #6: April 11, 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #6 WEDNESDAY, APRIL 11, 2012, 10:30 AM – 1:00 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Overview of Proposed Initiatives (10 minutes)
2. Breakout Groups on Initiatives (90 minutes)
3. Next Steps (10 minutes)
 - Final Comments on Initiatives Documents
 - Development of Draft Action Plan
 - Set next meeting date
4. Public Comment (10 minutes)



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #6: Proposed Initiatives (part 3)



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #6

April 11, 2012

Worcester Union Station



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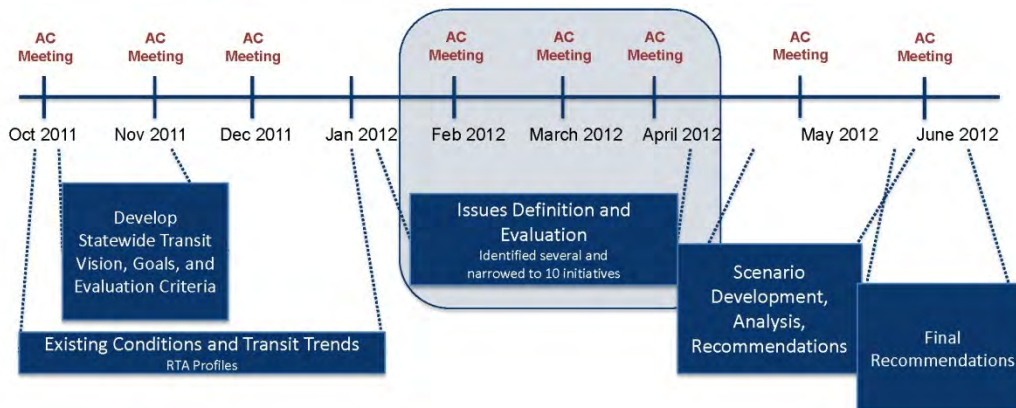


BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH



PROJECT TIMELINE



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PROPOSED INITIATIVES

■ Service Improvement

1. Develop Service Standards/Guidelines ✓
2. Improve Service Planning ✓
3. Develop Consistent Data and Reporting ✓
4. Enhance Public Information ✓

■ Funding

5. **Improve Contracting**
6. Improve Capital Planning ✓
7. **Identify Additional Funding**
8. **Develop More Effective Funding Process**

■ Other

9. Foster "Cross-Border" Collaboration ✓
10. Better MassDOT/RTA Collaboration ✓



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5. IMPROVE CONTRACTING

■ Issues

- RTAs often face unexpected cost increases
- Costs have been rising much faster than ridership
- RTAs may not be benefiting from robust competition

■ Potential Solutions

- Shift MA contracting to fixed-fee approach
- Increase use of incentives/penalties in contracts

■ Best Practices

- National research (CUTR) recommends contracts on a fixed-price basis
- PVTA

■ Outcome

- *Lower and more predictable costs*
- *Greater cost predictability*

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7. ADDITIONAL FUNDING

■ Issues

- Additional funding needed to expand/improve service
- Federal and state funding will not increase substantially in short-to-medium time frame

■ Potential Solutions

- Increase fares to fund additional service
- Develop partnerships with universities and colleges
- Develop partnerships with schools and others

■ Best Practices

- MA: PVTA, MART, GATRA
- Nationally: RIPTA, Pittsburgh, Mankato (MN), Seattle

■ Outcome

- *Additional funding to maintain and improve service*

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8. FUNDING PROCESS

■ Issues

- Current process:
 - Does not tie funding sufficiently to need
 - Is not sufficiently predictable or transparent
 - Does not balance state and federal funds
 - Does not encourage innovation/experimentation

■ Potential Solutions

- Develop new operating and capital funding processes

■ Best Practices

- Nationally: NY, PA, IA, WA, VA,

■ Outcome

- *Funding that better matches need and that encourages innovation and performance*

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Break-Out Group Discussion

- Divide into 3 groups
 - Facilitator is assigned to each group
- Spend 30 minutes per topic
 - Focus on constructive guidance
 - Respect everyone's opinions and viewpoints
 - Ensure everyone has opportunity to speak
- Report back after each topic is discussed
 - Facilitator will do reporting
- Technical advisors available to answer questions as needed



Break-Out Group Discussion

- What do you like/don't like about initiative?
- What would be the most important considerations?
- How could this be applied to Massachusetts?





Next Steps

- Deadline for submitting additional Initiative comments: April 20
- Next AC meeting: Thursday, May 24 1030am
- Develop a draft action plan across 10 initiatives
 - Focus on achievable recommendations
 - Incorporate input from last 3 AC meeting





BEYOND BOSTON – ADVISORY COMMITTEE MEETING #6 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: April 11, 2012, 10:30 PM –1:00 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Kyle Emge, MassDOT

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

Mary MacInnes, Pioneer Valley Transit Authority

Tom Narrigan, First Transit

Richard O'Flaherty, ATU Brockton Local 1547

Tanja Ryden, EOHHS, Human Service Transit

Gary Sheppard, BRTA

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Regan Checchio, Regina Villa Associates

Nancy Farrell, Regina Villa Associates

Agency/Public:

Jonathan Church, CMRPC

Matt Ciborowski, MassDOT

Gary J. Pires, ATU/SRTA



PURPOSE/SUBJECT: This was the sixth meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included breakout discussions of three of the ten initiatives recommended for this project.

HANDOUTS: Agenda

Welcome

Nancy Farrell, Regina Villa Associates, opened the meeting and explained that she was serving as the moderator of the Study Advisory Committee meeting. She introduced Scott Hamwey, MassDOT Project Manager.

Mr. Hamwey said the meeting would consist of review and discussion of three of the Beyond Boston initiatives in the same breakout format that was used at the last meeting.

- Initiative 5: Improve Contracting
- Initiative 7: Additional Funding
- Initiative 8: Improve Funding Processes

Mr. Hamwey gave a brief presentation. He showed the project timeline. He thanked the Advisory Committee for reviewing the documents in advance of the meeting and providing feedback on a conference call with all the RTAs. The documents sent out on Monday were revised based on comments received.

Mr. Hamwey reviewed the initiatives to be discussed and the issues, potential solutions, best practices and outcomes associated with each.

Breakout Groups on Initiatives

Ms. Farrell described the format for the breakout groups; the members were pre-assigned with a facilitator. Other participants were invited to sit in on the discussions. The groups would be allocated time to discuss each initiative and to report back. Facilitators would be responsible for reporting back for the breakout group. At the end of Ms. Farrell's overview, the Advisory Group went to their assigned groups and participated in the discussion of the individual initiatives.

A summary of the major and minor themes by initiative is provided at the end of these meeting notes.

Public Comment

There were no public comments.

Next Steps

Mr. Hamwey thanked all of the participants. He noted that MassDOT would accept comments on the draft documents until April 20. At this point, final versions will be posted on the project website. The next meeting will be on May 24, 2012. At this meeting, MassDOT and the Advisory Committee will discuss draft action plans.

Mary MacInnes asked if the final meeting for the project will include remarks by Secretary Davey. Mr. Hamwey said he will make that request.

Ray LeDoux thanked MassDOT for allowing more time in the breakout groups to discuss the initiatives.



Breakout Groups on Initiatives

Initiative 5: Improve Contracting

The GREEN Group:

- Fixed-cost breeds customer unfriendly environments.
- HST-incentives shares cost savings with HST and brokers.
- Fixed cost could produce better work environment.
- Fixed-cost can result in worse maintenance.
- Maybe create a pilot project on fixed-cost contracting? Is an RTA willing?
- Cost plus leads to unforeseen costs.
- Hire an expert (by MassDOT) to further examine RTA contracts and to answer outstanding questions.

The YELLOW Group:

- Historic precedent- why do Massachusetts RTAs use cost plus fee, while fixed-price is more predominant nationally?
 - 13C agreements with unions offered limited incentive to change (most are management + fee because limited opportunity to change)
 - Required to employ current employees and honor agreements
- In other places – contracts are for specific routes or areas, not overall operation.
- More could be completed in house, if there was an opportunity for larger in house staff. This could allow for better local control and operations.
- Lines between RTA, union and contractor are unclear in terms of contract negotiations.
- Fixed fee versus cost plus management fee
 - Performance measures should be incorporated regardless.
 - Recognize that these require management and oversight with limited staff.
 - Third party oversight and field monitoring are potential answers as well.
 - Performance measures should be tied into ITS for case reporting.
 - Types of performance measures
 - On-time performance
 - Boardings/alighting ridership?
 - Consistency
 - Customer satisfaction
 - Is there the potential to share benefits of reaching performance targets with union, not just the contractor?
- Why is there a difference in contracts between fixed route versus ADA?
 - Fixed route is more consistent.
 - Fixed route is tied to legacy and thus follow older model (cost + fee).
 - ADA has more contracting opportunities/flexibility, because it is newer and has different types of operations.
- RTA staff capability
 - Current structure requires contracting all services.
 - Much effort made just to manage contracts.



- Added staff could reduce delay in using contractors/DOT/RTAs.
- Functions such as marketing and planning could be completed in house with additional staff.
- Competition- is it growing? Needed?
 - There has been some movement locally.
 - Institutional knowledge is lost when contractors change.
 - The subsidiary stays intact regardless of change in management.
 - Changes to performance measures may invite added competition.

The RED Group:

- TRB Report may be outdated as a source because it reflects a shrinking number of respondents.
- Demand response versus fixed route
 - Demand response requires much oversight to minimize fraud.
 - Should there be the same contractor for both?
- Unit Cost approach (Fixed fee)
 - Approach makes it difficult to shift or expand service.
 - Requires strong contract oversight because of performance metrics.
 - Incentives may not be in line for things like maintenance and staffing levels.
 - Incentives could be included but penalties need enforcement and have an effect on price.
 - Approach may not be appropriate for certain types of RTAs with specialized service.
- Fixed Cost plus fee approach:
 - Contractor is an agent of the authority.
 - It is possible to add on some special services under unit cost bids.
- Competition
 - There are barriers within the industry.
 - Local providers may have better understanding and better reach into the community.
 - National providers may provide more economies of scale.
 - Different providers for different types of service? (fixed route versus demand response)

Initiative 7: Additional Funding

The GREEN Group:

- Legislature wants to control revenue collection, leaving little flexibility at the local level.
- Periodic fare increases would be a good policy.
- Encourage private foundation or other non-profit to subsidize low income riders?
- Sponsors? Community involvement/advocacy.
- Low income riders need to be considered. Subsidies for low-income riders could allow for fare increases.
- Consider establishing target levels for funding sources (e.g. X% federal, X% state, X% local).
- MassDOT could take the lead on employee pass programs.
- U-Pass
- New service should be 100% funded.
- MassDOT could help with public universities/colleges.



- Good idea!
- Employer pass programs should also be encouraged.
- Business improvement districts could be used.

The YELLOW Group:

- Change title to "Additional Revenue", not Additional Funding because really discussing how to grow revenue from operations not just dollars from federal and state agencies.
- Fares – can they be increased?
 - Difficult politically to increase, with no mechanism to revisit.
 - Could fare increases be tied to an indicator?
 - A consistent statewide approach would be helpful.
- Indexes possible for use
 - CPI
 - Cost Drivers (Fuel, Labor, Insurance)
 - Median Income
 - Farebox Recovery?
 - Non-transit indicators may be better, easier to accept and more fair.
- MassDOT's possible rules
 - Set fare floor
 - Time-based re-evaluation, e.g. every 3-5 years be required to revisit fare
- Paratransit fares
 - Service is more expensive to provide.
 - Raising fares is politically difficult, especially on paratransit populations.
 - A statewide policy directive could assist on raising fares.
 - MBTA raising fares helps as well.
- UPass – is this viable or promising?
 - Colleges have other pressures to deal with as well.
 - PVRTA has done a good job with UPass.
 - RTAs must provide meaningful service for this type of arrangement.
 - Attract a younger demographic by getting college students.
 - Interoperability with other services (commuter rail) is really important and what students want.
 - Universities benefit from these types of arrangement– they need less parking – and should look at improved transit as part of overall university planning.
 - Programs are marketing tools to university and students.
 - Need to make a transit case to universities.
 - Some colleges are harder to serve (location) or are geographically isolated.
 - State could make it more difficult to add parking for universities without looking at transit. There should be a regulatory trigger, like through MEPA or the state university capital process.
 - RTAs could provide service under contracts.



- UPass Funding
 - Look at university financing and direct investment
 - Fees are difficult (harder to get agreement)
- Tripper service (High School students)
 - Service is common in larger cities, but no real record of how process varies by city in MA.
 - Some are funded by municipalities
 - Service drives ridership up, which helps other metrics.
 - RTAs should share information on agreements through MassDOT or some other source.
- Local option taxes are a non-starter.

The RED Group:

- It is difficult to compare RTAs to the MBTA because one size does not fit all, and the systems and levels of services offered are very different.
- Is the overall goal more buses or more full buses?
- Fare Increases:
 - RTAs that have performed fare increases have used professional consultants and looked at factors such as peer comparisons and elasticity of demand (in both cases, demand exceeded projections).
 - One RTA administrator thought local factors such as the population and area served need to be considered before a fare increase.
 - RTAs are more flexible than the MBTA when it comes to fare increases; RTAs are based on what the market can bear.
 - In both cases, the fare increases were triggered by budgetary issues.
 - Politically, fare increases are easier to implement when not expanding service. (Existing riders feel they are paying for new riders otherwise.)
 - Recovery ratios are interesting to look at but it is difficult to impose this metric on RTAs since they are all so different.
 - Technology can help because it allows for a differentiated fare structure based on the service.
- Partnerships:
 - Interoperability with the MBTA system is very important.
 - It would be helpful if the Executive Branch or Governor worked with public universities.
 - Incentives to partner with private universities include interoperability and marketing.
 - Service hours are barriers when dealing with some universities.
 - Demonstrate that these agreements between RTAs and colleges are preferable to building expensive new garages.
 - Department of Public Welfare is a potential partner. There could be a transit pass element of their services.
 - Transit mitigation with private development could be part of the MEPA review process.
 - Test pilot transit projects paid for by developers
 - Work with Economic Affairs to add transit funding as part of the business development model
 - Work with EOHEd on Priority Development Areas and TOD districts



Initiative 8: Improve Funding Processes

The GREEN Group:

- Existing Process:
 - What's good?
 - It provides money!
 - Toll credits fill gap
 - What's bad?
 - No real process/predictability
 - Process always changes
 - Timing (but Working Group working on this)
 - Equity versus MBTA
 - Equity among RTAs
 - No policy
 - RTAs define equity differently
 - Some RTAs have better access to other funds than others
 - Funding in arrears
- What is "magic" solution?
 - Better communication – open and honest
 - Formulas? Accept that there will be winners and losers
 - Could formulas be good?
 - Operations: yes, if held harmless
 - Capital: probably not
- Measures
 - Performance
 - Demand/ridership
 - Income/Socio-economic characteristics?
 - Maybe not population?
 - Need mechanism to fund new services
 - Include justification
 - Separate pot
 - Different groupings of RTAs are good (3-4?)
- Capital
 - Need to address real needs not imaginary number
 - Needs-based process better than formula (with some minimum level?)
 - Collaborative process?
- How to figure out details?
 - Final decisions need to be made by MassDOT
 - Follow federal process for comments?



The YELLOW Group:

- Is there anything to like about the current process?
 - The only good story: There has been money but system is broken
- Operating:
 - Need for clarity in how moneys are distributed.
 - Move away from funding in arrears.
 - Local assessments should be available much sooner for use by RTAs.
 - Any changes could hold harmless to a certain dollar amount, perhaps even above current number.
 - Any agreement reached should be collaborative.
- Potential measures to determine operating allocation
 - Any discussion of this is partially a discussion of goals for what the transit system should be.
 - Should be defined in conjunction with measures for other initiatives.
- Transparency is a "Good Idea."
- MassDOT consistency is important and lacking.
 - Staffing changes have caused this inconsistency.
 - Lack of policy framework makes staffing changes even more pronounced.
- Discussion on a simple approach (NY) versus Complex (Need, Operations)
- These are both just ways to communicate your goals for transit.
- A good feature of the NY approach is that the Pot could expand.
- Capital assistance: (How could this process be improved?)
 - Staffing on both sides is critical.
 - Consistency in request and response reporting is missing.
 - Handbook for capital processes should be completed.
- Other revenue streams can be tapped, but it's unclear.
 - Toll credits
 - Other grant programs
 - How can state assist RTAs in getting other funds?
 - Processing
 - Needs planning to be tied into capital planning statewide and by RTA
- Start with defining capital funding process before operating.

The RED Group:

- Baseline amount of funding (enough for service desired?).
- Operations:
 - MassDOT must grade all RTAs on their planning process (look at collaborations) –on a simple Pass/Fail basis.
 - Formula could use 5307 as a starting point (similar elements, with different emphasis).
 - 5307 funds do not place enough emphasis on ridership and passenger miles.



- How do you calculate population? Should it include demographic characteristics (% transit dependent, % EJ, % minorities, income)? The formula needs to account for areas with seasonal and college populations differently.
- Disagreement over how heavily to weight population density; some found it most important
- Ridership less important than population and population density; more important than route miles
- Is need a factor in funding? How do you define need?
- Performance needs to be accounted for, but could be triggered after the new formulas are in place.
- Any factors used need to be carefully defined. (e.g. How is population defined? Does it include student population?)
- State needs to set goals and define needs, then make sure new formula helps support state vision for transit. (Serve transit dependent populations? Reduce auto use? Etc.)
- Transition to a new State Contract Assistance formula from the historical one:
 - Long transition – timeframe may depend on the impact of the new formula (longer timeframe if a large impact)
 - Need to determine the impact (in terms of SCA dollars) on any draft formula.
 - Impact can also be calculated in terms of service.
 - Local communities need to know if assessments will go up with any potential increase in SCA.
 - Hold harmless for a period of time.
- Capital:
 - A statewide inventory needs to be developed (could be done in 90 days) to examine current and future needs
 - Baseline level of funding to achieve "state of good repair" plus a wish list should additional funding become available.
 - The Legislature needs to become part of these discussions in anticipation of the 2014 Transportation Bond Bill.



Advisory Committee Meeting #7: May 24, 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #7 THURSDAY, MAY 24, 2012, 10:30 AM – 1:00 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Welcome/Meeting Topics/Ground Rules (10 minutes)
2. Draft Action Plans (120 minutes)
 - Part 1 Improve Service and Determine Needs
 - Develop Service Standards and Guidelines
 - Improve Service Planning
 - Develop Consistent Data and Reporting
 - Enhance Public Information
 - Part 2 Improve Funding/Cost-Effectiveness
 - Improve Contracting
 - Improve Capital Planning
 - Generate Additional Revenue
 - Develop More Effective Funding Processes
 - Part 3 Improve Collaboration
 - Improve “Cross-Border” Collaboration
 - Improve MassDOT/RTA Collaboration
3. Next Steps (10 minutes)
 - Final Action Plans and Timelines
 - Set next meeting date
4. Public Comment (10 minutes)



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #7: Draft Action Plans



BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH

Advisory Committee Meeting #7

May 24, 2012

Worcester Union Station



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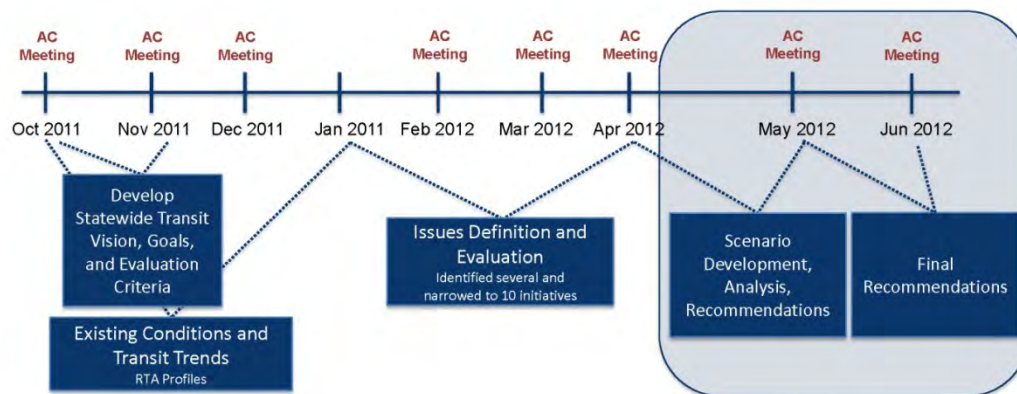


BEYOND BOSTON

A TRANSIT STUDY FOR THE COMMONWEALTH



PROJECT TIMELINE



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INITIATIVES DISCUSSION

1. Better MassDOT/RTA Collaboration
2. Develop More Effective Funding Process
3. Improve Capital Planning
4. Enhance Public Information
5. Develop Consistent Data and Reporting
6. Develop Service Standards/Guidelines
7. Improve Service Planning
8. Identify Additional Funding
9. Improve Contracting
10. Foster "Cross-Border" Collaboration



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Better RTA/MassDOT Collaboration

■ Issues

- MassDOT and RTAs don't work together as a team
- Roles not sufficiently defined
- Legal requirements not being met

■ Feedback

- *Initiatives will NOT succeed unless the MassDOT/RTA relationship is improved.*
- Both sides need to work to improve the relationship
- MassDOT doesn't have enough staff to do what it should do.
- The RTA Council could be a good format for improving this relationship if it is practical and productive
- MassDOT should think of the RTAs as individual entities, not as an association of RTAs.

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Better RTA/MassDOT Collaboration

■ Draft Action Plan

1. MassDOT should reconvene the RTA Council as a forum to share ideas and discuss potential program changes
2. MassDOT and the RTAs should work collaboratively to articulate a common vision for regional transit across the state
3. MassDOT should identify and define the specific roles and positions needed to carry out its regional transit obligations and oversight duties and expand staffing
4. MassDOT should transition to a more customer-focused “how can we help you” role that is clearly articulated



Improve Funding Process

■ Issues

- Current process:
 - Does not tie funding sufficiently to need
 - Is not sufficiently predictable or transparent

■ Feedback

- The current system for allocating RTA funding is fundamentally broken:
 - Lack of predictability
 - Inequitable (but committee members define equity differently)
 - Not based on clear policy, and is always changing
 - Delayed grants and funding “in arrears”
- Changes to allocation methods will result in “winners” and “losers”



Improve Funding Process

Feedback (continued)

- First step should be to develop a policy framework to guide funding decisions
- Some AC members believed that changes should be agreed to collaboratively; others believed that a final decision should be made by MassDOT.
- State Contract Assistance (SCA) funding should be formula-based
- Capital Funding should be needs-based
- RTAs need more time to spend capital money, and more flexibility about how funds are spent
- Existing capital process does not account for large, non-recurring expenditures such as major facilities and new construction.

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Improve Funding Process

Draft Action Plan

1. MassDOT and the RTAs should work together to advance transportation reform including forward funding and new revenues for regional transit
 - MassDOT should develop new needs-based capital funding process
 - MassDOT should develop new SCA formula:
 - Classify RTAs (Urban/Rural, Large/Small)
 - Develop formula that reflects state goals
 - Propose timeline for transition/phased implementation
 - Consider transition period to hold RTAs “harmless” for 3 years

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Improve Capital Planning

■ Issues

- Needs determined locally, so highest-need projects from statewide perspective are not always funded

■ Feedback

- General consensus that all RTAs should have a capital plan that covers their fleets, facilities, and passenger amenities
- Strong RTA sentiment that capital planning should be an RTA responsibility, as they already have a good handle on needs
- Concern about lack of capacity at MassDOT
- Concern that MassDOT does not create processes that are clear, simple and transparent
- MPO process as it currently stands is not a good model for capital programming



Improve Capital Planning

■ Draft Action Plan

1. Develop preliminary Asset Condition Inventory based on information provided by RTAs
2. Develop a framework for a long-term Statewide RTA Asset Condition Inventory:
 - Define specific roles and responsibilities for MassDOT and RTAs.
 - Identify level of detail to be collected, a rating system for asset condition, and electronic/web-based templates for asset inventory.
3. Require RTAs to submit annual 5-Year Capital Plans, beginning in 2013.
4. MassDOT should prepare an annual Statewide RTA Capital Plan based on individual submissions.



Enhance Public Information

■ Issues

- Wide range in quality of information
- Expectations of current/potential customers continue to evolve rapidly
- RTAs do not always have necessary resources/expertise

■ Feedback

- Most agree that a base level of public information should be provided by all systems
- Many or most RTAs find it difficult to provide public information when they are struggling to maintain service
- Designing a high quality website is viewed as expensive
- RTA customers already understand the service being provided
- MassDOT could provide professional expertise, personnel or a standard approach that could be adapted locally



Enhance Public Information

■ Draft Action Plan

1. Form MassDOT/RTA working group to:
 - Identify public information priorities
 - Establish minimum set of public information to be provided by all RTAs
 - Identify other desirable public information efforts
 - Develop formatting and presentation standards/guidelines
2. Determine best process for implementing new approaches (for example, MassDOT initiative, on-call marketing consultant, by individual RTAs, etc.)
3. MassDOT should produce a Public Information Guidebook
4. MassDOT should create discretionary grant program to provide funding for RTAs that desire to improve public information beyond the minimum standards



Develop Consistent Data/Reporting

■ Issues

- Blending of NTD data for different service types, between RTA and HST
- MassDOT/public do not always have access to most current data

■ Feedback

- Benefits of better information are numerous
- Directions and forms should be clearly defined and should be consistent with existing reporting requirements (i.e., NTD)
- Reporting deadlines should consider end of year audits and other constraints (e.g., seasonal constraints at VTA, NRTA)
- Don't standardize where information must come from; each RTA should use the most accurate system available to them
- Reporting places an administrative burden on systems; data should only be collected once

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Develop Consistent Data/Reporting

■ Draft Action Plan

1. MassDOT should develop a standardized reporting methodology that provides consistent data by:
 - RTA
 - Mode
 - Geographical area
2. MassDOT should produce a Data Reporting Guidebook that:
 - Defines and describes the new process
 - Provides technical assistance to the RTAs to implement the new process.
3. MassDOT should develop an electronic submittal process that simplifies reporting, compiles the data, and produces summary reports



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Develop Service Standards/Guidelines

■ Issues

- No service standards or other consistent performance measurement systems used on the statewide level
- Difficult to accurately assess effectiveness of much of Commonwealth's transit system

■ Feedback

- Broader use of performance statistics would be a good and reasonable practice, but concern over the use of minimum service standards
- Standards and guidelines should be simple and straightforward, and reflect industry standards
- Standards and guidelines should be oriented towards different types of service rather than different types of RTAs



Develop Service Standards/Guidelines

■ Draft Action Plan

1. RTAs should collaboratively develop a set of service standards and guidelines that:
 - The RTAs would find most useful
 - Could be used consistently by all RTAs and MassDOT.
2. MassDOT should then work with the RTAs to refine the RTA proposal to a final program.
3. MassDOT should produce a service guidelines document that presents the adopted guidelines
4. MassDOT should work with the RTAs to develop a reporting format that is easy to compile.





Improve Service Planning

■ Issues

- Changes in demographics, population, and employment centers continue to occur
- Route structures remain relatively constant

■ Feedback

- Service planning is important and useful
- RTAs should periodically conduct Comprehensive Service Analyses (CSAs)
- CSAs should document previous and planned changes in the community
- CSAs should focus on local conditions and objectives
- Plans should be locally driven
- RTA representatives believe that if the state wants to encourage CSA type planning efforts, it should fund them.

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Improve Service Planning

■ Draft Action Plan

1. RTAs should conduct CSAs every five years
2. At a minimum, the CSAs should include:
 - Market analysis
 - Detailed evaluation of the performance of existing routes and services
 - Development and evaluation of alternative service scenarios
 - Development of changes to better align services with market demand
3. CSAs should primarily be funded using FTA Section 5303 Metropolitan Planning funds.
4. CSAs should be managed jointly by the RTAs and MPOs
5. MassDOT should develop CSA guidebook

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Identify Additional Funding

■ Issues

- Additional funding needed to expand/improve service
- Federal and state funding will not increase substantially in short-to-medium time frame

■ Feedback

- Periodic, scheduled fare increases could be a good policy, and a consistent statewide approach would be helpful
- MassDOT and the Commonwealth should help RTAs establish UPass agreements with state-funded colleges and universities
- Employer pass programs should also be considered and pursued as a potential revenue source
- Local tax options to support transit are a non-starter



Identify Additional Funding

■ Draft Action Plan

1. Establish RTA-led working group to develop a statewide fare policy
2. Review existing partnerships with state/private colleges and universities, and develop a framework for University Pass programs
3. Use framework to implement UPass programs at state colleges and universities. As part of this strategy, RTAs may begin to also work with private colleges and universities
4. MassDOT should review the potential for employee transit pass programs
5. RTAs should review current operational agreements with local school districts for the provision of school trips



Improve Contracting

■ Issues

- RTAs often face unexpected cost increases
- Costs have been rising much faster than ridership
- RTAs may not be benefiting from robust competition

■ Feedback

- Existing contracts are based on historical precedent
- Current practices are constrained by Federal 13C agreements and Chapter 161B of M.G.L.
- Differences of opinion about fixed-price contracting
- AC RTA members believe there is enough competition in the contracting process
- RTAs are interested in using performance measures in their contracting



Improve Contracting

■ Draft Action Plan

1. MassDOT and RTAs should:
 - Collaboratively evaluate contracting practices in Massachusetts
 - Compare/contrast Massachusetts's practices with industry standards and national best practices.
2. MassDOT should play a role in information-sharing on contracting issues by:
 - Maintaining an inventory of all current RTA contracts.
 - Creating a database of RTA contracts to identify major terms and elements.
3. MassDOT should produce MA RTA Contracting Guidebook and/or Procurement Manual.





Increase Cross-Border Collaboration

■ Issues

- Much informal/ad-hoc collaboration
- More formal collaboration could expand benefits

■ Feedback

- Already a large amount of inter-RTA collaboration among many RTAs
- Some believe MassDOT involvement could be useful; others not
- Some interest in development of “Centers of Excellence” to pool resources used for certain RTA activities
- Other stakeholders could also be included, such as RPAs and other providers of transportation (Steamship Authority, private bus, TMAs, etc.)



Increase Cross-Border Collaboration

■ Draft Action Plan

1. RTAs should identify the issues they find most challenging to deal with and where, if at all, they would appreciate having outside technical expertise, including from MassDOT
2. RTAs should develop strategies to expand and formalize collaboration among themselves
3. RTAs should further explore the concept of “Centers of Excellence” in areas such as:
 - Information technology
 - Mobile app development
 - Procurement, training
 - Maintenance services





Next Steps

- Revise draft action plan based on feedback (from this meeting and other comments received by June 1)
- Add detail and timelines to action plan
- Present final recommendations (action plan and timeline) to AC on June 14
- Finalize recommendations (late June)
- Begin implementation (July)





BEYOND BOSTON – ADVISORY COMMITTEE MEETING #7 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: May 24, 2012, 10:30 PM –12:30 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Kyle Emge, MassDOT

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

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, EOHHS, Human Service Transportation Office

Project Team/Consultants:

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Regan Checchio, Regina Villa Associates

Nancy Farrell, Regina Villa Associates

Agency/Public:

Matt Ciborowski, MassDOT

Jonathan Church, CMRPC

Gary J. Pires, ATU/SRTA

LV Randolph III, TransMetro Media



Erik Rousseau, SRTA

Gary Shepard, BRTA

Nathan Spencer, Trans Metro Media

PURPOSE/SUBJECT: This was the seventh meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included a discussion of the draft action plan for the ten initiatives recommended for this project.

HANDOUTS: Agenda; Discussion Framework

Welcome/Meeting Topics/Ground Rules

Nancy Farrell, Regina Villa Associates, opened the meeting and explained that she was serving as the moderator of the Study Advisory Committee meeting. She said that the discussion would focus on input from the Advisory Committee on the Draft Action Plan. In addition to the discussion, MassDOT will be accepting comments on the Plan until June 1.

Ms. Farrell then introduced Scott Hamwey, MassDOT Project Manager. Mr. Hamwey reviewed the Project Timeline, noting that after this meeting, there would be a final meeting of the Advisory Committee in June to review the final recommendations.

Mr. Hamwey briefly reviewed the ten initiatives in the draft action plan. He said the discussion items were prioritized based on feedback MassDOT received on the online survey that he sent out earlier in week. The "Better MassDOT/RTA Collaboration" initiative will be discussed first since it is relevant to many of the other items.

Ms. Farrell reviewed the format for the meeting. Mr. Hamwey would present each initiative, with the known issues, feedback received, and draft action plan outlined. Then, Ms. Farrell planned to take comments and suggestions from the Advisory Committee at the end of each initiative. Public comment would be welcome at the end of the meeting (or during each discussion period, if time permitted).

Draft Action Plans

Mr. Hamwey presented PowerPoint slides that summarized the issues, feedback, and draft action plan for each initiative.

Improve MassDOT/RTA Collaboration

All of the parties felt that this is an important effort and should be addressed and worked on to assure that the remaining initiatives will be successful.

Suggestions

- *Mary MacInnes (PVTA):* Add a mechanism for MassDOT to be aware of initiatives by individual RTAs.
- *Mr. Hamwey:* MassDOT Planning staff could be more active on RTA issues (similar to MPO structure)
- *Steve O'Neil, (WRTA):* MassDOT staff could attend RTA Advisory Board meetings.
- *John Lozada (MassDOT):* Meeting summaries of the RTA Board meetings could be reviewed by MassDOT staff.



Develop More Effective Funding Processes

Mr. Hamwey noted in his presentation that MassDOT, the RTAs and the Legislature will need to work together to ensure a transparent transportation funding process for FY14. A transition to a new funding formula will be easier if there is additional revenue for the RTAs in this new funding system.

Suggestions

- *Ray LeDoux (BATA)*: Weave in transit terms such as "state of good repair" for better understanding. Tie "hold harmless" to the CSAs?
- *Mr. Hamwey*: Duration of "hold harmless" will be up for debate, but there needs to be a sunset provision.
- *Gary Shepherd (BRTA)*: The "hold harmless" provision could prevent RTAs from accessing new funding.
- *Kyle Emge (MassDOT)*: "Hold harmless" is the minimal level of funding. It will not prevent future funding.
- *Angela Grant (MVRTA)*: MassDOT and RTAs should develop SCA formula.
- *Tom Narrigan (First Transit)*: Guideline for "hold harmless" should come out of that process.
- *Mr. Hamwey*: "Hold harmless" language will be clarified in the document. MassDOT and RTAs will discuss how long before sun setting.

Improve Capital Planning

Mr. Hamwey noted that a statewide document articulating all RTA near-term capital needs could help make the case for additional funding at a statewide level.

Suggestions

- *Mr. Narrigan*: What is the level of detail MassDOT is looking for? It could be a significant burden if an asset condition inventory process is required.
- *Mr. LeDoux*: Remove the word "condition" from the process.
- *Ms. Grant*: The RTAs could develop a standard "state of good repair" that is not necessarily the MBTA one.
- *Chris Anzuoni*: An agency that does great preventive maintenance should not be penalized under this approach.

Enhance Public Information

There is a wide variety in the quality and quantity of information provided on websites. There should, at minimum, be a system map, and Mr. Hamwey noted that MassDOT has some work to do on its own presentation of RTA information on its website. He asked if there is a role for MassDOT to assist with better information provision (in addition to a "challenge" grant initiative the Secretary mentioned at the State House presentation).

Suggestions

- *Mr. Lozada*: There should be clear ADA/Title VI standards.
- *Mr. Narrigan*: What is the role of MassDOT (511, state website)?
- *Mr. Hamwey*: MassDOT needs to develop the RTA page on the own website.
- *Mr. Narrigan*: Is the effort of developing a guidebook worth it?



- *Mr. Hamwey:* The guidebook could identify a reasonable web standard, balancing independence with the benefits of standardization.
- *Tanja Ryden (EOHHS):* A number of RTAs are developing a rider tool. One that knits together all resources could yield a common platform/guidelines.
- *Mr. LeDoux:* Would MassDOT provide a state webmaster for all RTAs?
- *Mr. Hamwey:* MassDOT will be providing challenge grants for RTAs who are doing innovative website work.

Develop Consistent Data and Reporting

Mr. Hamwey said that the data lags too far behind when MassDOT gets it from the federal database and developing an approach that is electronic and provides for data that can also be rolled into federal reporting requirements would make sense.

Suggestions

- *Frank Gay (GATRA):* MassDOT and RTAs should develop the form together.
- *Mary Ellen Blunt (CMRPC):* There should be a mechanism to share data with other RTAs and RPAs, as part of the ITS plan.
- *Mr. Narrigan:* There needs to be justification for an additional data requested (why is it being requested and how is it being used).
- *Mr. Hamwey:* MassDOT is not interested in requiring more data of the RTAs than they are already collecting for NTD purposes.

Develop Service Standards and Guidelines

Mr. Hamwey noted that he thinks it makes sense for the RTAs to take the lead on this initiative and develop a proposal.

Suggestions

- *Mr. Anzuoni:* What happens if standards and guidelines are not met?
- *Mr. Hamwey:* These would identify problem areas to focus on, not service to be discontinued.

Improve Service Planning

MassDOT recognizes that this could be a burden for the rural RTAs and it will work with them to find funding. Service planning is important and needs to be done on a regular basis.

Suggestions

- *Ms. Blunt:* For most 5303 funds are not enough to conduct a new CSA (and already fund other activities). Market analysis is very expensive, especially phone surveys.
- *Geoff Slater (N\N):* The market analysis is not intended to include phone surveys but service build outs.
- *Ms. Grant:* Many RPAs do not have the staff to conduct CSAs.
- *Mr. Hamwey:* MassDOT recognizes the gaps, but thinks CSAs are a legitimate use of 5303 funds; MassDOT would help find funds for the rural RTAs. The initial CSAs have a fairly high cost, but updates would be less expensive, certainly for some period of time.
- *Mr. LeDoux:* MassDOT and the RPAs should develop the guidebook.

Generate Additional Revenue

Mr. Hamwey noted that this discussion is in addition to the revenue discussion that will take place with the Legislature. He emphasized that Secretary Davey has said that RTAs will be part of that discussion.

Suggestions

- *Mr. O'Neil:* Is MassDOT suggesting indexing fare policy to a CPI standard?
- *Mr. Hamwey:* MassDOT is looking for RTA guidance on an index and what they want it to be linked to. It could be the MBTA fare, for example.
- *Mr. Shepherd:* RTAs should not be penalized and lose state funding if they fund additional revenue sources.
- *Mr. Hamwey:* RTAs should view fare increases as an opportunity to fund additional service or to preserve service that might otherwise be eliminated. This would not impact state funding levels.
- *Mr. LeDoux:* RTAs should be tied to mitigation programs and MPO/RTA comments to MEPA should have a greater role.
- *Mr. LeDoux:* MassDOT should evaluate the opportunity to create an RTA reserve fund to mitigate unanticipated costs.
- *Mr. Emge:* There are reserve funds that are tied to state funding, but this proposal is tied to the more effective funding process.
- *Ms. MacInnes:* Mitigation should also include roadway and highway projects, if transit is impacted.
- *Ms. Blunt:* Service needs to get to a standard where universities want to use the system, such as with more weekend and evening service.

Improve Contracting

Mr. Hamwey noted that this initiative provides for less of a role for MassDOT. According to the draft plan, MassDOT would serve as an information sharing-house for the RTAs.

Suggestions

- *Mr. Anzuoni:* New business models should be explored that include the contractor and employees.
- *Mr. LeDoux:* Why is a procurement model needed?
- *Mr. Hamwey:* MassDOT is suggesting a Best Practices model and the word "Procurement" could be eliminated.
- *Ms. Ryden:* It could be called, "Contracting Best Practices."
- *Michael Lambert (MBTA):* This book would benefit the MBTA as well.

Improve "Cross-Border" Collaboration

Mr. Hamwey asked if there was a role for MassDOT here since cross-border collaboration was already happening. There were no suggestions.

Next Steps

Mr. Hamwey said the draft plan will be posted on the project website once it has been refined to include comments from this meeting and those sent to him. **He reminded the Committee that comments are due to MassDOT by June 1.**



Final recommendations including the action plan and timeline will be presented to the Advisory Committee meeting at the next meeting on **June 14 at 10:30 AM**. Recommendations will be finalized in late June, and implementation will begin in July.

Mr. O'Neil asked if MassDOT intends to implement all ten initiatives. Mr. Hamwey acknowledged that the actions get less ambitious at the end of the initiative list – where MassDOT has less of a potential role - but MassDOT will weigh in on all ten.

Ms. Grant said that another opportunity for MassDOT and the RTAs to work together will be the MARTA conference in the fall. She suggested holding some Working Group sessions.

Mr. Lozada asked about the public awareness of the document. Mr. Hamwey said that plan was been to work through the Advisory Committee for input, but MassDOT will consider a way to release the document to the public.

Public Comment

Nathan Spencer, Trans Metro Media, suggested using advertising and branding in Charlie Cards as a way to generate additional revenue for the RTAs.



Advisory Committee Meeting #8: June 14, 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #8 THURSDAY, JUNE 14, 2012, 10:30 AM – 12:30 PM WORCESTER UNION STATION

(Meeting is on 2nd Floor)

AGENDA

1. Welcome/Meeting Topics/Ground Rules (10 minutes)
2. Review Revised Action Plans (30 minutes)
 - Develop Service Standards and Guidelines
 - Improve Service Planning
 - Develop Consistent Data and Reporting
 - Enhance Public Information
 - Improve Contracting
 - Improve Capital Planning
 - Generate Additional Revenue
 - Develop More Effective Funding Processes
 - Improve “Cross-Border” Collaboration
3. Discuss Proposed Action Plans (60 minutes)
 - See handout
4. Public Comment (15 minutes)
5. Beyond Boston –Final Project Steps (5 minutes)

Advisory Committee Meeting #8: Revised and Proposed Action Plans



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH

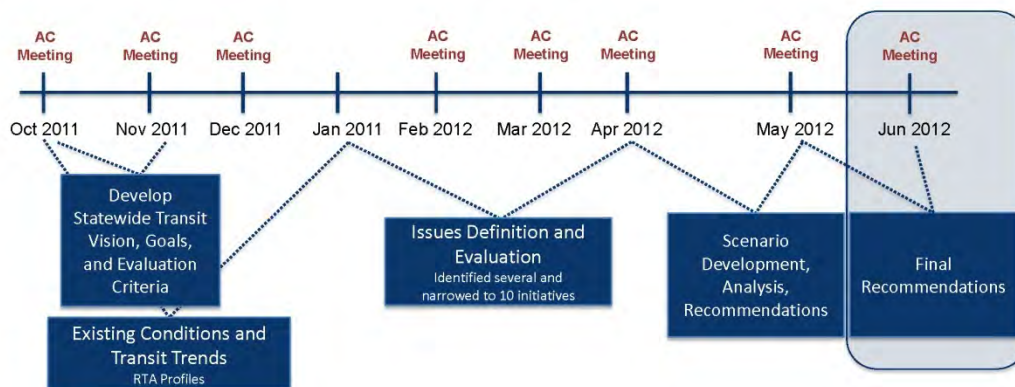
Advisory Committee Meeting #8
June 14, 2012
Worcester Union Station



BEYOND BOSTON
A TRANSIT STUDY FOR THE COMMONWEALTH



PROJECT TIMELINE





INITIATIVES DISCUSSION

- Better MassDOT/RTA Collaboration
- Develop More Effective Funding Process
- Improve Capital Planning
- Enhance Public Information
- Develop Consistent Data and Reporting
- Develop Service Standards/Guidelines
- Improve Service Planning
- Identify Additional Revenue
- Improve Contracting



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A. Improve RTA/MassDOT Collaboration

- Draft Action Plan
 - MassDOT and RTAs should reconvene the RTA Council as a forum to share ideas and discuss potential program changes.
 - MassDOT should begin process of expanding the staff assigned to the Rail and Transit Division.
 - MassDOT should transition to a more customer-focused “how can we help you” role that is clearly articulated.



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B. Improve Funding Process

■ Draft Action Plan

- MassDOT and RTAs should pursue supportive legislative initiatives:
 - Forward Funding
 - Estimate overall need to advocate for greater funding
 - Level of toll credits available to support RTA projects
- MassDOT to develop new capital funding allocation process based on need.
- MassDOT and RTAs should work together to identify more transparent and flexible process for State Contracting Assistance.



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C. Improve Capital Planning

■ Draft Action Plan

- MassDOT to obtain current asset data from RTAs.
- MassDOT to develop Framework for Statewide Asset Inventory:
 - Define specific roles and responsibilities for MassDOT and RTAs.
 - Identify level of detail to be collected, a rating system for asset condition, and electronic/web-based templates for asset inventory.
- MassDOT to submit annual 5-Year Capital Plans, beginning in 2013.
- MassDOT to work with RTAs to develop annual Statewide RTA Capital Plan.



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D. Enhance Public Information

■ Draft Action Plan

- MassDOT and RTAs to identify public information priorities and standards:
 - Minimum set of public information to be provided by all RTAs
 - Formatting and presentation standards/guidelines
 - Use of external tools to disseminate information
- MassDOT and RTAs to determine approach for implementation.
- MassDOT to prepare RTA Public Information Guidebook.
- MassDOT to identify discretionary grant funds for public information programs.



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E. Develop Consistent Data/Reporting

■ Draft Action Plan

- MassDOT should develop a standardized reporting methodology that provides consistent data by:
 - RTA
 - Mode
 - Geographical area
- MassDOT should produce a Data Reporting Guidebook that:
 - Defines and describes the new process
 - Provides technical assistance to the RTAs to implement the new process
- MassDOT should develop an electronic submittal process that simplifies reporting, compiles the data, and produces summary reports.



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F. Develop Service Standards/Guidelines

■ Draft Action Plan

- RTAs collaboratively develop a set of service standards and guidelines that:
 - The RTAs would find most useful
 - Could be used consistently by all RTAs and MassDOT
- MassDOT and RTAs work together to refine the RTA proposal.
- MassDOT and RTAs work collaboratively to develop a reporting format that is consistent and easy to compile.



G. Improve Service Planning

■ Draft Action Plan

- RTAs should conduct CSAs every five years.
- CSAs should primarily be funded using FTA Section 5303 Metropolitan Planning funds.
- RTAs and MPOs will jointly manage CSAs.
- MassDOT to develop CSA handbook for guidance and consistency.
- CSA results intended to identify unmet needs and advance new projects.





H. Identify Additional Revenue

■ Draft Action Plan

- RTAs to form working group to review current fare policies and triggers for fare increases.
- MassDOT and RTAs to develop framework for UPass agreements.
- RTAs and MassDOT to develop framework for other partnerships:
 - Employee transit pass programs
 - Agreements with local school districts



I. Improve Contracting

■ Draft Action Plan

- MassDOT to play a role in information-sharing on contracting issues by:
 - Maintaining an inventory of current RTA contracts
 - Creating a database of RTA contracts to identify major terms and elements
- MassDOT to support RTAs interested in piloting alternate contracting approach.





Implementation Proposals

- **More specific direction than Action Plan:**
 - Includes recommended lead agency and general timeline
 - Some initiatives require more effort than others
 - Not all timelines start at once
- **Are implementation plans reasonable?**
 - Do they provide the right level of detail?
 - Are the expectations realistic?
- **What are the priorities for Implementation?**
 - Which actions first?
 - How soon can we get started?



Next Steps

- **Final AC meeting today (6/14)**
- **Final comments to MassDOT (Scott) by June 22**
- **June 27 RTA Administrators meeting with Secretary Davey**
 - Union Station
- **Prepare final document**
 - Compilation of study materials
- **Begin implementation late summer/early fall**
 - Schedule RTA Council Meeting for Summer 2012

BEYOND BOSTON – ADVISORY COMMITTEE MEETING #8 MEETING NOTES

LOCATION OF MEETING: Union Station, Worcester, MA

DATE/TIME OF MEETING: June 14, 2012, 10:30 PM –12:30 PM

Advisory Committee Members:

Chris Anzuoni, Plymouth and Brockton Street Railway Company

Mary Ellen Blunt, Central Massachusetts Regional Planning Commission

Frank Gay, Greater Attleboro Taunton Regional Transit Authority

Angela Grant, Martha's Vineyard Transit Authority

Scott Hamwey, MassDOT, Office of Transportation Planning

Michael Lambert, MBTA

Ray LeDoux, Brockton Area Transit Authority

John Lozada, MassDOT, Office of Civil Rights

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, EOHHS, Human Service Transportation Office

Project Team/Consultants:

Matthew Ciborowski, MassDOT, Office of Transportation Planning

Geoff Slater, Nelson\Nygaard

Bethany Whitaker, Nelson\Nygaard

Ralph DeNisco, Nelson\Nygaard

Anne Galbraith, ASG Planning

Nancy Farrell, Regina Villa Associates

Agency/Public:

Jonathan Church, CMRPC

Gary Pires, SRTA

Jeannette Orsino, MARTA

Alex Roman, PTM/Veolia



Yahaira Graxinerva, CMRPC

Theadora Fisher, EOHHS

Erik Rousseau, SRTA

PURPOSE/SUBJECT: This was the eighth and final meeting of the Advisory Committee for the project, *Beyond Boston: A Transit Study for the Commonwealth*. The agenda included a review of updated action plan for the initiatives recommended as part of this project and a discussion of the proposed implementation plan.

HANDOUTS: Agenda; Draft Implementation Plan

Welcome/Meeting Topics

Nancy Farrell, Regina Villa Associates, opened the meeting and explained that this was the final Advisory Committee meeting of the Beyond Boston study. She thanked everyone for their participation in the study, noting input from the Advisory Committee has been instrumental to the project's outcomes and success. Ms. Farrell also noted that while the study is finishing up, materials presented at this meeting are still in draft form and open for comments.

Ms. Farrell then turned the meeting over to Scott Hamwey, MassDOT Project Manager. Mr. Hamwey reiterated that this was the final Advisory Committee meeting and thanked the Advisory Committee members for their attendance, effort and participation throughout. He also thanked the consultant team.

Mr. Hamwey explained at the last Advisory Committee meeting (May 24, 2012) there was a very good discussion on the Action Plans and the team was able to collect a lot of useful comments. Given there was general buy-in on the Action Plan, the team took the next step of developing an implementation plan. Mr. Hamwey said at this meeting, the focus will be on the draft implementation plan.

Draft Action Plan

Mr. Hamwey briefly summarized the Draft Action Plan for each initiative to update the Advisory Committee members on how their comments were incorporated into the final document. Mr. Hamwey also said the number of initiatives was reduced from ten to nine. This change recognizes that there is no particular role for MassDOT on the Cross-Border Collaboration initiative.

Mr. Hamwey went through the nine initiatives quickly, requesting that most Advisory Committee members focus comments on the proposed changes and that there would be more opportunity for discussion in the next part of the meeting (Implementation Plans).

Mr. Hamwey said "Improve MassDOT/RTA Collaboration" is the most important initiative because it starts the conversation for the remaining initiatives. MassDOT knows it needs to take a stronger role, including adding capacity. He said MassDOT just posted advertisements for two positions within the last few days. MassDOT also wants to work with the RTAs to re-establish regular RTA Council meetings to promote productive discussions.

Mr. Hamwey also made a special note about the initiative to "Improve Service Planning." MassDOT feels that the comprehensive aspect of CSAs are important and that federal Section 5303 formula funds will be part of the solution. MassDOT understands it may have to augment these funds at some RTAs.



Comments

- *Mary Ellen Blunt (CMRPC)*: The Massachusetts Association of Regional Planning Agencies met recently and expressed interest in being involved in the RTA Council.
- *Richard O'Flaherty, (ATU)*: Unions and advocacy groups (e.g., seniors) would also like to be included in the RTA Council.
- *Mr. Hamwey*: RTA Council is legislated to be MassDOT, the MBTA and the 15 RTAs. It could be open to the public, but the final format of the meetings need further clarification.
- *Chris Anzuoni (Plymouth and Brockton Street Railway Company)*: This study needs to concentrate more on the MassDOT side, not just how RTAs can improve. Be clearer about who at MassDOT does what, who is responsible for which programs and what the procedures are.
- *Mr. Hamwey*: Agreed. The RTA Council would make a good forum to invite MassDOT staff from different departments.
- *Frank Gay (GATRA)*: The “Statewide Vision” for transit seems to have been dropped as one of the Action Plan items. Why was this dropped? MARTA is disappointed that this has been dropped.
- *Mr. Hamwey*: Feeling that this was duplicative with work done earlier in the study, but MassDOT will consider putting it back in to develop “strategic direction” for regional transit.
- *Mr. Anzuoni*: Suggested that other transportation providers be included in any vision for regional transit in MA.
- *Ms. Blunt*: MARPA sent a comment letter saying 5303 is not sufficient to conduct CSAs and the language should be changed from “primarily funded” to “partially funded.”
- *Mr. Hamwey*: MassDOT will respond to the MARPA letter before finalizing recommendations.
- *John Lozada (MassDOT)*: The Action and Implementation plans need to include and carefully distinguish between Title VI and ADA requirements, when referenced.
- *Ray LeDoux (BAT)*: The Action Plan should recognize the importance of “hold harmless” provisions under the funding initiatives.

Implementation Plan

Mr. Hamwey said the discussion would follow the handout provided as part of the meeting. The handout is very similar to the materials sent to the group prior to the meeting, with a few changes. One of the major changes is the ordering of the initiatives to reflect the order they were discussed at the May 24th Advisory Committee meeting.

Mr. Hamwey reiterated that the success of the last Advisory Committee meant the study team had the opportunity to drill down a bit on each initiative and identify some of the specific next steps. He also recognized that MassDOT needs to add staff to carry these things out.

Mr. Hamwey pointed out that Month 1 refers to the first month when work is started; it is not necessarily July 2012 and that even though the implementation plans are fairly detailed, the discussion should focus on the major steps. Finally, he said comments on the implementation plans can be submitted up until next Friday, June 22.

Improve MassDOT/RTA Collaboration

Mr. Hamwey explained that MassDOT would like to hold an RTA Council meeting sometime at this summer.



Suggestions

- *Mr. LeDoux*: Recommended changing “redefine” to “re-engage” in Item 1b.
- *Mary MacInnes (PVTA)*: MassDOT may not be fully aware of everything the RTAs are doing and the RTA Council could help educate MassDOT about the RTAs. She suggested that this be part of the meetings.
- *Steve O’Neil (WRTA)*: There should be more definition of the RTA Council roles and tasks. Also, this would be a good opportunity for everyone to learn about MassDOT players and their different roles.
- *Mr. Hamwey*: Agreed to both.

Develop More Effective Funding Processes

Mr. Hamwey explained that a working group should be started to discuss how a new funding process will be developed. It is envisioned that in year one, a new process for distributing State Contract Assistance would apply only to any amounts above the current statewide SCA total.

Suggestions

- *Angie Grant (VTA)*: Thought that the funding allocation process was supposed to be discussed by MassDOT and RTAs, not just MassDOT.
- *Mr. Hamwey*: Agreed. The document should be changed so that 1a and 1b read “MassDOT and RTAs.”
- *Ms. Grant*: Hold harmless in 1e should be highlighted and brought out prominently. It should be emphasized that this is something Mass DOT and RTAs must work on together.
- *Mr. Hamwey*: The document can be changed to say MassDOT and the RTAs will work together on how to transition to the new funding process. MassDOT aims to create a transparent transition.
- *Tanja Ryden (EOHHS)*: Suggested that changing the word “formula” with “mechanism” might help alleviate some of the concern.
- *Mike Lambert (MassDOT)*: The legislature needs to understand where the funds are going and how they will be distributed. This will be especially true if any new money is authorized.
- *Mr. O’Neil*: Hold harmless should be for all funds less than \$62 million.
- *Ms. MacInnes*: Emphasize that any new money is not only for new service but also to fund existing operating deficits.
- *Mr. Hamwey*: There will be a process to determine new formula needs to be clarified. This also needs to transition over time so that it covers more of the overall funding in line with the goals and policies established. The SCA allocation process would make a good first agenda item for the RTA Council.
- *Mr. LeDoux*: Also clarify that on 1g it says FY14. Is this State of RTA FY14, because the RTAs are funded in arrears. Also – will the CSAs influence funding decisions?
- *Mr. LeDoux and Ms. MacInnes*: Expressed the sentiment that MassDOT and the RTAs will not likely be able to come up with a formula that everyone likes.
- *Mr. Hamwey*: We will clarify the dates on the document. As for CSAs influencing funding, that is a likely goal but we are not there yet.
- *Ms. Grant*: The RTAs or RTA Council should also be added to item 2f.
- *Ms. MacInnes*: Additional funding is needed before the MassDOT/RTA relationship can improve. MassDOT should be more specific about working with RTAs prior to the next legislative session to pursue additional funding.



Improve Capital Planning

Mr. Hamwey said the Improve Capital Planning initiative focuses on developing a clear framework for capital planning.

Suggestions

- *Mr. LeDoux:* In 4d, it should be changed to FY 14 and FY15 as it is already contracted.

Enhance Public Information

Mr. Hamwey explained that MassDOT feels this initiative is very important and he would like the timeline to be more aggressive. He would like to quickly establish state guidelines, and noted that identifying discretionary funding for this initiative will be a first priority.

Suggestions

- *Mr. LeDoux:* Agreed that they should be able to make progress on this initiative. He also said he likes the Challenge Grant opportunity. There should be a target (e.g., 6 months) for completion of 2e.
- *Ms. MacInnes:* The Challenge Grant should focus on innovative ideas.
- *Mr. Hamwey:* Developing evaluation criteria can be added to 2b
- *Ms. Grant:* There is an opportunity to take this issue to the MARTA Conference on September 17 and 18, an idea that met with general approval
- *Ms. Ryden:* Suggested including target audiences when establishing guidelines.

Develop Consistent Data and Reporting

Mr. Hamwey said the overall discussions have been oriented toward keeping this effort as simple as possible.

Suggestions

- *Mr. LeDoux:* MassDOT should be aware that NTD data gets modified by the RTAs following the initial submission in October. Data is final the following June.

Develop Service Standards and Guidelines

Mr. Hamwey said this implementation plan looks to the RTAs to take the first step.

Suggestions

- *Ms. MacInnes:* A RTA committee has already been formed and is working on this. They will submit some written comments by next Friday.
- *Ms. Grant:* Which department in MassDOT will be working on this with the RTAs? Planning? Performance Management? Rail and Transit? This is more of a general comment but it really applies here.
- *Mr. Anzuoni:* Want to make sure that reporting and standards don't end up in a score card that misconstrues information or accidentally penalizes RTAs for the wrong reason. Some programs may inadvertently penalize RTA 'scores', even though they are good ideas. Need to be careful about how the scorecard is prepared.



Improve Service Planning

Mr. Hamwey reiterated that MassDOT feels that the comprehensive aspects of CSAs are important and has identified federal 5303 funds as part of the solution and understands that it may have to augment these funds.

Suggestions

- *Mr. LeDoux:* Suggested development of the guidebook to be a joint effort of MassDOT and RTAs. Also suggested changing 1d to be role of RTAs with MassDOT support.
- *Mr. Hamwey:* Agreed.
- *Ms. MacInnes:* Some RTAs won't be on the same schedule as everyone else.
- *Mr. LeDoux:* What is the timeline? Sometimes we hear 5-10 years, then five years and then seven years.
- *Mr. Hamwey:* The ideal situation would be that all of the RTAs complete a CSA within the next five years and CSAs would be updated every seven years after that.
- *Ms. MacInnes:* Agreed that is a reasonable timeframe, as long as there is funding.
- *Mr. Gay:* Need to put a bullet to "identify funding and matching resources."
- *Ms. Blunt:* Need to keep in mind the funding cycle for the TIP and 5303.

Identify Additional Revenue

Mr. Hamwey said there is less emphasis here in terms of MassDOT next steps. He also said one of the major changes in the revised document is that the Forward Funding items were moved to the Develop More Effective Funding initiative.

Suggestions

- *Ms. MacInnes:* Need to recognize the roles of RTA Advisory Boards in fare increases.
- *Mr. Anzuoni:* If RTAs develop better community partnerships, it will help their effort to pursue additional funding.
- *Mr. LeDoux:* The goals are laudable, but timelines are not realistic. It can take years to get a UPass agreement together. The discussion may occur, but implementation takes longer.
- *Mr. O'Flaherty:* Why isn't this higher on the priority list if it is a way to get more funds?

Improve Contracting

Mr. Hamwey noted that the language was changed in the document sent out last week to take out the word compliance.

Suggestions

- *Tom Narrigan (First Transit):* The language in part c is new and is very strong.
- *Mr. LeDoux:* This looks like MassDOT interjection into a RTA process. This could cause delays and add cost to RTA services, if MassDOT has an approval role.
- *Mr. Hamwey:* MassDOT recognizes our role is fairly narrow and we do not have the capacity to review each contract. This is not what MassDOT is proposing.
- *Mike Lambert:* The intent is not to review all contracts, but to ensure the interest of the taxpayer. MassDOT does not intend to interrupt the procurement process.
- *Mr Anzuoni:* Best practices in contracting should be shared.



- *Mr. O'Flaherty and Mr. Lozada:* Transparency would be aided by having all contracts available and catalogues.
- *Mr. Lozada:* It is helpful for MassDOT to have contracts in hand for any FOIA requests.

Public Comment

Gary Pires (SRTA ATU) thanked MassDOT for including a labor component in this study and working group. It is the first time in recent memory that labor has been included.

Next Steps

Mr. Hamwey said the consultant support will be ending on June 30. Secretary Davey will be at Union Station to meet with the RTAs on June 27. Comments on the Implementation Plan are due to MassDOT by Friday, June 22.

The next steps are for the consultants to prepare a final document. Mr. Hamwey said the final report will not prioritize the initiatives, but one of the first priorities is the RTA Council meeting. The RTA Council can prioritize future direction at this meeting. The final document will be a binder with sets of reports and documents, rather than a large report.