Forging Ahead: Service Planning

Fiscal and Management Control Board
September 14, 2020
Laurel Paget-Seekins & Kat Benesh
What Is Forging Ahead?

- Forging Ahead is a process the MBTA is using to focus its operating and capital resources on the customers who depend most on the MBTA for frequent and reliable service.
  - We are prioritizing equity to ensure we are serving people currently riding and those most likely to come back over the next year.
- This is a short-term process over the next 3 months to inform the FY22 budget and an ongoing iterative process to understand how ridership will return to inform future decisions
- Includes a public and stakeholder engagement component with multiple points for input in the process
What We Know

• Before COVID we had a network with gaps and that had not kept up with our changing region, that is why we have been working to transform bus and rail.

• And now, that is even more true, but perhaps in different ways. This is especially likely for commuter rail.

• Our goal for recovery should not be to just go back to the network we had before.

• We need to forge ahead building the foundation for the transit service that will power an equitable and sustainable economic recovery for Massachusetts.
What We Know We Don’t Know

We are currently managing through uncertainty. We don’t know with certainty:

• When we can relax social distancing guidelines
• How our fare revenue will recover
• How travel patterns have changed in a more permanent way due to telework, housing and land use changes, or mode shifts
• The length and nature of the economic recovery
• Congestion levels and how competitive our service will be

We do know that our decisions also play a role so they should be guided by principles for the future we want and scenarios using the best data we have.
Scenario Planning

• The MBTA is working with MassDOT and CTPS to understand the best data we have and develop scenarios

• The scenarios will consider:
  • Short (FY22) and medium (2-3 years) timeframes
  • Ridership propensity based on demographics, land use, and economic factors
  • Economic recovery projections

• The short-term effort will identify the essential service that needs to be preserved and then develop options based on fare revenue projections

• The medium term effort will inform continued service planning, capital planning, and the future fare structure under Fare Transformation
Service Principles: Trade-offs to Develop Service “Packages”

• Alignment on **principles** help us redesign service:
  • In the short-term to serve those who need us most
  • In the medium term as a foundation for recovery
  • Are scenario-agnostic, but help translate the scenarios into service plans

• **Principles answer three key questions:**
  • What people and places (or trips) are we prioritizing?
  • What kind of system do we want at the “end”, regardless of whichever scenario(s) is most likely?
  • What are acceptable service outcomes (based on decisions above)?
## Principles

<table>
<thead>
<tr>
<th>Key question</th>
<th>Recommended Principle</th>
<th>Alternative <em>(not recommended)</em></th>
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<tbody>
<tr>
<td>What people and places are we prioritizing?</td>
<td><strong>Existing and likely to return ridership</strong>, including durable ridership during COVID-19 and environmental justice communities</td>
<td>• Prioritize fare revenue or cost per passenger to drive decision-making</td>
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<td>• Possible service level changes to <strong>all modes</strong>, but analyzed at the route and line level</td>
<td>• Exclude some mode(s) from service change analysis</td>
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<td>What kind of system do we want?</td>
<td><strong>Simpler, less redundant, and more equitable system</strong>, which is therefore more resilient, efficient, and easier to use</td>
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<td>• Preserve/invest in <strong>quality service</strong> (frequency) in key areas instead of degraded service everywhere</td>
<td>• Try to maintain existing network structure in long term</td>
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<td>• These are <strong>permanent</strong> changes – if and when additional resources available, we <strong>will not</strong> recreate the pre-COVID system</td>
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# Defining Our Essential Services

Analysis will be done at the bus route/corridors, rapid transit lines, commuter rail lines/corridors, ferry routes, and overall RIDE service area.

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<th>Serving high transit critical population</th>
<th>Serving low transit critical population</th>
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<tbody>
<tr>
<td><strong>Higher ridership</strong>&lt;br&gt;(current or propensity)</td>
<td>Preserve or enhance service / access&lt;br&gt;(though individual trips may still be affected)</td>
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<tr>
<td><strong>Lower ridership</strong>&lt;br&gt;(current or propensity)</td>
<td>Consider trade-offs depending on budget availability</td>
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Transit critical is defined as low-income, people of color, zero or low car households. Transit propensity includes demographics, land use and employment factors.
Potential Service Outcomes Based on Principles

Example service outcomes to be discussed in more depth on 9/21 (not exhaustive):

- Riders may need to **walk further, transfer more, or switch transit modes** (incl. RTAs)
- Riders may need to **pay more** due to transfers, mode switches, or coverage changes
- **Frequency, time of day, and coverage** may all be changed
- Routes and/or line service patterns may be **restructured**
- Some pre-COVID ridership may **lose transit access** (>0.5 miles from transit)
- We will consider trade-offs between **reducing fleet sizes** to decrease maintenance, as alternative to deeper service reductions
- **Alternative service models** (vehicle sizes, etc.) may be considered for long-term

Are there any additional **potential** outcomes that should be discussed on 9/21?
Timeline for Service, Budget, and Capital Updates

September 21 (Joint Board)
- **Service Planning:** Seek policy direction on service level tradeoffs
- **Budget:** Return to the board to detail August results (monthly recurrence) - budget balance, spending, revenue (by mode, product, or channel), and headcount activity
- **Service Planning:** High level scenarios by mode based on essential service analysis
- **Capital Planning:** Seeking policy direction on capital tradeoffs

October 5 (FMCB)
- **Budget:** Return to the board to detail August results (monthly recurrence) - budget balance, spending, revenue (by mode, product, or channel), and headcount activity
- **Service Planning:** High level scenarios by mode based on essential service analysis

November 2020
- **Budget:** Return to the board to revise budget projections as needed based on Q1 results
- **Update on FY21 savings initiatives to achieve budget targets**
- **Service Planning:** More detailed service scenarios
- **Capital Planning:** Present recommended CIP reprioritization to accommodate shift of 5307 funds to operating and other reductions

December 2020
- **Service Planning:** Preliminary Board consideration of service level scenarios

July 1, 2021
- **Budget:** FY22 begins and three-pronged approach implemented