

Evaluation and Selection of Pilot Transit Services *Proposed Policy for Consideration*

Fiscal Management & Control Board

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Overview

This presentation seeks to:

1. Determine a process for reviewing the four proposals for pilot transit service already before the MBTA
2. Propose elements of a new policy for and approach to evaluating future requests for pilot transit service
 - Recommend review process for pilot proposals
 - Recommend criteria for evaluating future requests for new transit service
 - Recommend performance measures to evaluate the success of pilot operations

Why Consider a Policy on Service Pilots?

- While the MBTA is primarily focused on fixing its existing assets and operations, there are unmet transit needs in communities within the MBTA service area.
- In its capital program, roughly 80% of funds are devoted to reliability and modernization, but some capital funding is allocated to expansion projects.
- Similarly, some operating resources should be used to allow the MBTA to pilot modest additions of service in places where demand appears to warrant it.
- A structured policy will provide both MBTA staff and those seeking new service with a transparent means to evaluate new concepts.

What Do We Mean By 'Service Pilots'?

- All new services under consideration by the MBTA should begin as pilots so that the cost-effectiveness of the services can be evaluated before they become permanent.
 - Recent pilots have included late-night bus service and taxi and rideshare pilots for RIDE users.
- A service pilot is the limited-time, experimental provision of a new transit service by the MBTA.
- Service pilots are different from system expansion projects in that they require little or no capital investment.
 - Evaluations of capital expansion projects are handled through the CIP process.

Current Pilot Service Proposals

- Municipalities, land owners, developers, and interest groups have at different times approached the MBTA with requests to provide new types of transit service.
- Four examples are currently before the MBTA for consideration:
 - Bourne: Commuter Rail Service from Buzzards Bay to Boston, via Middleboro-Lakeville Line
 - In 2015, Bourne voted to join the MBTA District to advance the pilot
 - Foxborough: Commuter Rail Service from Foxborough to Boston
 - An MOU for permanent service was signed in 2004; Foxborough Selectmen recently voted to support
 - Lynn: Ferry Service from Lynn to Boston
 - Lynn operated seasonal service 2014 and 2015 and has requested operating support from MassDOT and/or the MBTA to continue
 - Boston: Overnight Bus Service
 - The City of Boston and others have supported piloting and the FMCB has instructed staff to analyze options for a new form of overnight bus service

Current Pilot Service Proposals

- While all future service pilots should be developed pursuant to a final, adopted policy on service pilots, staff recommends that we be allowed to continue to work with the sponsors of the four current proposals to develop:
 - More refined service proposals
 - Public outreach plans, if needed
 - Evaluation criteria and performance goals consistent with the draft policy on service pilots
- Given the long germination of some of the pending proposals, we seek permission to be able to move forward while the full policy is still being developed and finalized.
- The results of this work will be presented to the FMCB for discussion and votes on whether to implement the proposed pilots; no pilot would proceed without FMCB approval.

Development of a Pilot Policy

- A new pilot policy would create a framework to:
 - Establish a **process** by which new pilot proposals can be evaluated
 - Establish **evaluation criteria** and **performance goals** for proposed pilot services
 - Determine whether a proposal meets enough of those goals to merit **short-term implementation**
 - Using **performance metrics**, evaluate the effectiveness of the pilot service in order to determine if it should be continued

Elements of a Policy: Process

- Future pilot proposals could be reviewed in the following way:
 1. Staff analyze pilot proposals, following a process laid out in a workplan jointly prepared by the MBTA and the sponsor
 2. Staff will then present the analysis to the FMCB for a decision on implementation (one or two presentations prior to decision, as desired)
 3. Prior to implementation, staff develop a program for gathering data and measuring performance during the life of the pilot
 4. Staff present to the FMCB at key milestones
 5. FMCB ultimately votes on whether to continue the pilot

Questions for Consideration

- Should the MBTA actively solicit pilot proposals?
- If so, should there be an annual schedule – perhaps tied to the MBTA budget or CIP schedule – on which proposals can be submitted?

Elements of a Policy: Proposed Evaluation Criteria

- Prior to implementation, MBTA staff will evaluate proposed pilots on these and other criteria:
 - Whether the goals of the pilot harmonize with MBTA strategic and operational goals
 - Anticipated capital and operating costs
 - Burden placed on the MBTA operating divisions and/or Keolis
 - Anticipated demand and likely market receptivity
 - Characteristics of the proposed service
 - Anticipated environmental benefits
 - Whether the proposed service will assist the MBTA in meeting its service delivery standards
 - Demonstrated local support
 - Access to economic opportunities and job markets underserved by transit, particularly for low-income individuals
 - Density of nearby residents and jobs, including planned economic development

Evaluation of Implemented Pilots: Performance Measures

- Specific performance measures would be developed for each project and used to judge the success of the pilot.
- At a minimum, no pilot will be approved without committing to the following:
 - A specific projected operating subsidy per trip, comparable to the average current per-trip subsidy on the most similar existing service.
 - A specific amount of capital expenditure (if any) and identified sources for that spending.
 - A ridership target for the pilot expressed as both total ridership over the pilot period and average daily ridership.

Proposed Next Steps

- Refine and analyze current pilot proposals in order to present them to the FMCB for a decision on implementation
- Flesh out proposed evaluation criteria and remaining elements of the policy and present to the FMCB for a vote
- Identify agency staff to be responsible for pilot proposals and for managing a pilot review program