Goals of the Presentation

- Provide FMCB high level review of Integrated Fleet and Facilities Plan
- Initial presentation of multi-week discussion
- Engage and solicit FMCB feedback on draft document & key principles
  - Fiscally unconstrained
  - Guide future CIP and maintenance planning / prioritization
  - Evolving document with annual updates
- Begin to finalize plan with strategic guidance from FMCB
Presentation Overview

- Integrated Fleet and Facilities Plan – Aligned with MBTA Strategic Vision
- Plan Overview – Mission, Purpose, and Scope
- Strategic Goals and Objectives
- Fleet and Facility Needs
- Alternative Procurement and Financing Approaches
- Next Steps and Execution – IFFP Task Force
Aligned with MBTA Strategic Vision - Focus40 Planning

*The MBTA plans to execute the commitments made in the **FMCB Strategic Plan**

**Focus40: Meeting the Needs of the Region in 2040**

- *Fleet & Facilities Plan*
  - Electric Bus Study
- Blue Line Resiliency Planning
- Green Line Capacity Study
- Orange Line Capacity Study
- Mattapan High Speed Line Study
- Commuter Rail Vision
- Bus Service Plan

**Project Development**

5-Year Capital Investment Plan
20-Year Capital Investment Plan

**IMPLEMENTATION**
Aligned with Focus40 Scenario Planning

- The Fleet and facilities Plan team has been working with the Focus40 team to understand different scenarios for population and employment trends through 2040 and to integrate into planning for our fleet tomorrow.

Redefining Scenario Planning: Potential Futures

- MetroFuture
- Innovation Acceleration
- Business as Usual
- Climate Responsive

Developing Ridership Projections Based on Future Population Growth to Inform Fleet Purchases

Graph showing population projections from 1980 to 2040 with different scenarios.
Integrated Fleet and Facilities Plan Overview

A strategic document that serves as a foundational roadmap to restore MBTA revenue fleets and their supporting maintenance facilities to State of Good Repair (SGR) in 15 years, consistent with the objectives of the FMCB Strategic Plan.

The Integrated Fleet and Facilities Plan is:

- Revenue fleets & maintenance facilities
- Currently fiscally unconstrained
- Designed to be implemented over 15 years
- Consistent with MBTA strategic plan
- Being aligned with Focus40 projections for ridership growth
- Focused initially on current MBTA service
- An evolving document, subject to annual updates
- A starting point for strategic fleet maintenance
Integrated Fleet and Facilities Plan Overview

The Integrated Fleet and Facilities Plan is an early step in a larger organizational effort, and is not intended to address all aspects of MBTA operations.

The Integrated fleet and Facilities Plan is not:

- A plan for stations, non-revenue vehicles, track, signals, and other infrastructure
- Fiscally constrained and therefore is not reconciled with the 5-year CIP
- Solely SGR – it assumes both modernization and capacity investments
- A plan for one-for-one replacement of existing vehicles
- Inclusive of operating costs
- Phased to ensure MBTA has sufficient bandwidth to execute simultaneous fleet procurement
## Integrated Fleet and Facilities Plan – Draft Strategic Objectives

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<thead>
<tr>
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<tbody>
<tr>
<td>Formalize MBTA Fleet Lifecycle Policy</td>
<td>Prioritize Bus Facility Investments</td>
<td>Improve Fleet Maintenance Programs</td>
<td>Establish Environmental Stewardship Policies</td>
</tr>
<tr>
<td>Increase Reliability</td>
<td>Formalize MBTA Facility Lifecycle Policy</td>
<td>Improve Facility Maintenance Programs</td>
<td>Develop Building Standards Policy</td>
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<tr>
<td>Develop Fleet Optimization Strategy</td>
<td>Define Vehicle Storage and Capacity Standards</td>
<td>Integrate Fleet On-Board Technologies</td>
<td>Reduce Fleet Emissions</td>
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<tr>
<td>Formalize Contingency Fleet Policy</td>
<td>Develop Facility Redundancy Strategy</td>
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<td>Improve Fueling Infrastructure</td>
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<td>Improve Accessibility of the Fleet</td>
<td>Adopt Efficient Building Layouts and Configurations</td>
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<td>Develop Climate Resiliency Strategy</td>
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<td>Achieve SGR within 15 years</td>
<td>Achieve SGR within 15 years</td>
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Investments for Fleet and Maintenance Facility Needs

- Plan currently fiscally unconstrained
- Assumes no alternative procurement, financing or ownership models
- Key studies currently underway will impact specific actions taken
- New and modernized maintenance facilities will be needed to support new improved fleets. Future facility investments will be driven by policy decisions, including on fleet ownership
Alternative Procurement and Financing Approaches

*MBTA will develop specific procurement and financing strategies to accelerate program execution and optimize available resources and service performance*

- An initial review of global and domestic procurement and financing models has been conducted
- For each project, delivery options will be screened in light of specific policy objectives and benefits and costs will be fully evaluated
- IFFP Task Force will work with MBTA senior leadership to conduct project evaluations and present recommendations to the FMCB
- Key considerations in selecting a delivery strategy:
  - Alignment with MBTA policy objectives
  - Risk transfer and risk mitigation
  - Performance incentives
  - Efficiencies and lifecycle cost optimization
  - Procurement and delivery speed and ease of execution
  - Private sector market
  - Federal funding and credit assistance
Plan Execution - IFFP Task Force

Focused attention by MBTA / MassDOT staff and leadership will be critical to overall success of IFFP execution, particularly during the first 2 years

• Dedicated group of key individuals with involvement from:
  o MassDOT / Focus40
  o Operations
  o Vehicle Engineering
  o Engineering and Maintenance
  o Capital Budget
  o Capital Delivery

• Leverage subject matter experts from other departments as needed

• Focus on program prioritization, execution, resources, and opportunities for alternative procurements

• Responsible for periodic reporting to FMCB and updates to IFFP

• Key initial / critical focus on Bus Maintenance Facilities
Upcoming Presentations

Over the next several weeks, the following presentations will provide additional details of draft plan.

- Heavy Rail (Red, Orange, and Blue) – November 20th
- Bus – November 27th
- Commuter Rail, Ferry, and Paratransit – December 4th
- Light Rail (Green Line and Mattapan) – December 11th

Plan will be finalized once additional direction is given by the board.