



Massachusetts Bay Transportation Authority

External Pilot Policy Update

Process for FY21

May 6, 2019



Background: What is a pilot?

A pilot is a way to test an idea before formally adopting it. All pilots should have:

- Start and end date
- A clear goal or research question
- Specified performance metrics with targets
- Clear sponsor or departmental owner
- Limited or no ability to create stranded investment if not made permanent

There are many types of pilots:

New service

Transit priority/bus lane

New fare products

For FTA Title VI purposes pilots allow transit agencies to try out changes before completing an equity analysis.

- Major service changes pilots can last 12 months
- Fare changes pilots can last 6 months



New Service Pilots

The MBTA has multiple ways of adding or changing service.

- Service changes through quarterly changes, commuter rail schedule changes, or service planning processes (e.g. Better Bus Project) are not pilots because they don't have a proposed end date.
- New Service Pilots are taken under consideration through two different processes.
 - Internal planning processes (e.g. Bus Network Redesign demonstration projects)
 - **External Transit Pilot Policy process**



External Transit Pilot Policy

- Policy adopted by the FMCB on March 27, 2017
 - Provided a transparent process for external partners to propose new service pilots
 - Established common performance measures for all pilots and pilot specific measures
 - Set a timeline for the FMCB to consider all of the proposals together
- FMCB suspended its consideration of additional External Pilots for FY20 in order to allow staff and board to focus on evaluation of pilots already adopted
- MBTA continues to hear from external stakeholders and municipal partners with new/ revised pilot proposal ideas across modes

Approved pilots in 2017

Early Morning Bus:
Started April 2018, made permanent

Late Night Bus: Started September 2018

Foxboro Commuter Rail:
Starting Fall 2019



Lessons Learned

Lessons learned from first iteration of the external pilot process

- Took more staff time than anticipated
- Determining the sponsor's financial role in the pre-pilot analysis or operating cost was challenging
- Process and evaluation complexities and proposal development cost may deter applications or create equity concerns
- Difficult to compare pilots against each other if they are not presented to the board/management in a package



Proposed timeline for external pilots in FY21

Today: Decision on whether to restart process

May- June: Outreach to potential sponsors about the process

June-July: Staff works with potential sponsors to clarify proposals and roles and responsibilities

July 31: Proposals due

August- September: Staff works with partners to refine proposals

October: Proposals presented to FMCB for feedback

November/December: FMCB vote on pilot proposals



Appendix



FTA definition of service pilots for Title VI purposes

A transit provider may exempt a temporary addition of service (e.g., demonstration projects), including those that would otherwise qualify as a major service change, from its definition of major service change. If a temporary service addition or change lasts longer than twelve months, then FTA considers the service addition or change permanent and the transit provider must conduct a service equity analysis if the service otherwise qualifies as a major service change.

FTA Title VI Circular 4702.1B Chapter IV-13