



## BOSTON REGION METROPOLITAN PLANNING ORGANIZATION

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Stephanie Pollack, MassDOT Secretary and CEO and MPO Chairman  
Karl H. Quackenbush, Executive Director, MPO Staff

### *MEMORANDUM*

**DATE** March 19, 2015  
**TO** Boston Region Metropolitan Planning Organization  
**FROM** Karl H. Quackenbush  
CTPS Executive Director  
**RE** Work Program for: MBTA Service Delivery Policy Customer Input

#### Action Required

Review and approval

#### Proposed Motion

That the Boston Region Metropolitan Planning Organization, upon the recommendation of the Massachusetts Bay Transportation Authority, vote to approve the work program for MBTA Service Delivery Policy Customer Input presented in this memorandum

#### Project Identification

##### Unified Planning Work Program Classification

Technical Support/Operations Analysis Projects

##### CTPS Project Number

11398

##### Client

Massachusetts Bay Transportation Authority  
*Project Supervisors:* Ted Basta

##### CTPS Project Supervisors

*Principal:* Elizabeth Moore  
*Manager:* Annette Demchur

##### Funding

Future MBTA Contract

## Impact on MPO Work

The MPO staff has sufficient resources to complete this work in a capable and timely manner. By undertaking this work, the MPO staff will neither delay the completion of nor reduce the quality of any work in the UPWP.

## Background

Under a previous contract with MassDOT, CTPS is assisting the MBTA in the process of reviewing and updating its Service Delivery Policy and the service standards contained therein. For this process, CTPS is working with MBTA staff and a technical advisory committee and will consult with a group of peer agencies and a policy advisory committee. In addition, in keeping with the MBTA's interest in understanding a customer-oriented perspective on service performance, CTPS will work with the MBTA to obtain customer input on potential service-standard metrics and thresholds. This work program outlines a plan for ensuring that customer input and customer-oriented standards are incorporated into the Service Delivery Policy update process.

## Objective

The objective of this project is to obtain customer input on the service-standard metrics and thresholds used by the MBTA for evaluating its services.

## Work Description

The work required to accomplish the project's objective will be carried out in the five tasks described below.

### Task 1 Review and Summarize Existing Survey Data

CTPS staff recently created an inventory of transit surveys conducted by or for the MBTA, and is developing a searchable database of the questions included in these surveys and the locations of the data sets and summary reports of data analyses. CTPS staff will use this database to identify surveys that included questions that had been designed to solicit feedback on customer preferences and priorities; acquire the data collected from the responses to those questions; and summarize the results.

#### *Product of Task 1*

Tabular summary of customer feedback from existing survey data

### Task 2 Assist the MBTA in Conducting a Customer Survey

CTPS staff will assist the MBTA staff in developing a Web-based passenger survey to solicit customer input on service preferences and priorities that could be considered when developing service standards. The questions will be

designed to solicit information on the everyday customer decision-making related to transit use that could help to inform the process of updating the existing service standards, and the analysis of any new aspects of service performance identified in Task 1 and in the literature review and peer review tasks of the Service Standards and Service Delivery Policy Update project. CTPS will have the survey translated into the top five limited-English-proficiency languages in the MBTA service area: Spanish, Portuguese, Haitian/French Creole, Chinese (both simplified and traditional), and Vietnamese.

In addition, CTPS staff will work with the MBTA Marketing Communications Department and Operations Department to develop and implement a survey marketing and distribution strategy. This strategy will include a method for obtaining a representative sample of MBTA riders.

Finally, CTPS will analyze and summarize the results of the new survey and share this information with the Technical Advisory Committee and Policy Advisory Committee.

#### *Products of Task 2*

- Customer survey
- Survey marketing and distribution strategy
- Summary of survey results

#### **Task 3 Assist the MBTA in Conducting Focus Groups with Advocacy Organizations**

CTPS staff will work with MBTA staff to solicit feedback from members of advocacy groups who have an understanding of the technical details and tradeoffs involved in selecting metrics and setting thresholds for MBTA service standards. CTPS and MBTA staff will conduct up to 10 focus-group meetings with advocacy groups to measure the level of support for specific proposals for service-standard metrics and thresholds identified by the Technical Advisory Committee. The focus groups will be chosen to ensure that riders with different backgrounds, transit experiences, and modal usage are represented. The focus groups may include members of the following groups:

- MBTA Rider Oversight Committee (ROC)
- Public Transit–Public Good (PTPG)
- Alternatives for Community and Environment (ACE)/Transit Riders Union (TRU)
- Youth Affordability Coalition (YAC)
- A Better City (ABC)

- Local TMAs
- Massachusetts Senior Action
- Access Advisory Committee to the MBTA (AACT)
- Transportation for Massachusetts (T4MA)
- Chelsea Collaborative

CTPS will document, synthesize, and summarize the discussions that occur in these meetings and will share this information with the Technical Advisory Committee and the Policy Advisory Committee.

*Product of Task 3*

Summary of the findings from the focus-group meetings

**Task 4 Assist the MBTA in Obtaining Input from Policy Advisory Committee Constituents**

CTPS and MBTA staff will work with the members of the Policy Advisory Committee who represent constituency groups in order to solicit feedback from their membership on potential service-standard metrics and thresholds. To do this, CTPS staff will assist MBTA staff in developing instruments for soliciting this information. Additionally, CTPS staff will assist MBTA staff in training the Policy Advisory Committee members in techniques for engaging their membership in the process and for soliciting input throughout the process. CTPS will synthesize the results and feedback obtained from the Policy Advisory Committee members in this process, and will share this information with the Technical Advisory Committee and the Policy Advisory Committee.

*Product of Task 4*

Summary of the input received from Policy Advisory Group constituents

**Task 5 Produce a Table and Present a Summary of the Results of Tasks 2 through 4**

CTPS will compile, analyze, and synthesize the data obtained in Tasks 2, 3, and 4 of the project in tabular format and present a summary of the findings to the Technical Advisory Committee and the Policy Advisory Committee.

*Products of Task 5*

Summary of results in tabular format and presentation of findings to the Technical Advisory Committee and the Policy Advisory Committee

## Estimated Schedule

It is estimated that this project will be completed 11 weeks after work commences. The proposed schedule, by task, is shown in Exhibit 1.

## Estimated Cost

The total cost of this project is estimated to be \$46,336. This includes the cost of 15.2 person-weeks of staff time, overhead at the rate of 91.82 percent, and other direct costs. A detailed breakdown of estimated costs is presented in Exhibit 2.

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**Exhibit 2**  
**ESTIMATED COST**  
**Service Delivery Policy Customer Input**

<b>Direct Salary and Overhead</b>							<b>\$39,736</b>
Task	Person-Weeks			Direct Salary	Overhead (91.82%)	Total Cost	
	M-1	P-3	Total				
1. Review and Summarize Existing Survey Data	0.2	1.1	1.4	\$1,651	\$1,516	\$3,167	
2. Assist the MBTA in Conducting a Customer Survey	2.9	3.1	6.0	\$8,508	\$7,812	\$16,319	
3. Assist the MBTA in Conducting Focus Groups with Advocacy Organizations	2.0	3.0	5.0	\$6,817	\$6,260	\$13,077	
4. Assist the MBTA in Obtaining Input from Policy Advisory Committee Constituents	0.8	1.2	2.0	\$2,727	\$2,504	\$5,231	
5. Produce a Table of Results and Present a Summary of Findings to Committees	0.2	0.6	0.8	\$1,012	\$930	\$1,942	
Total	6.2	9.0	15.2	\$20,715	\$19,021	\$39,736	
<b>Other Direct Costs</b>							<b>\$6,600</b>
Survey translations, interpreters at meetings						\$6,600	
<b>TOTAL COST</b>							<b>\$46,336</b>

**Funding**  
 Future MBTA Contract