



BOSTON REGION METROPOLITAN PLANNING ORGANIZATION

Jamey Tesler, MassDOT Secretary and CEO and MPO Chair
Tegin L. Teich, Executive Director, MPO Staff

WORK PROGRAM

MBTA MOBILITY INTEGRATION FRAMEWORK

JANUARY 20, 2022

Proposed Motion

The Boston Region Metropolitan Planning Organization (MPO) votes to approve this work program.

Project Identification

Unified Planning Work Program (UPWP) Classification

Agency and Other Client Transportation Planning Studies and Technical Analyses

Project Number 13316

Client

Massachusetts Bay Transportation Authority (MBTA)

Client Supervisor: Lynsey Heffernan

Project Supervisors

Principal: Rebecca Morgan

Manager: Paul Christner/Sandy Johnston

Funding Source

MassDOT Directed PL Funds

Schedule and Budget

Schedule: 8 months from notice to proceed

Budget: \$138,384

Schedule and budget details are shown in Exhibits 1 and 2, respectively.

Relationship to MPO Work

This study is supported in full with non-MPO funding. Committing MPO staff to this project will not impinge on the quality or timeliness of MPO-funded work.

Background

The MBTA has requested that Central Transportation Planning Staff (CTPS) perform research to support its interest in exploring a framework for integration (for example, technology, fare, payment, service, physical, etc.) with other mobility providers in Massachusetts, such as transportation network companies (TNC) and bikeshare providers. This project will support the MBTA with answering the policy question, or “why” side of mobility integration. The MBTA wishes to develop a policy that will guide its assessment of potential integrations in a way that is rigorous, honest, and supports the MBTA’s own goals and objectives. This research will support the MBTA in establishing a framework for the future of mobility integrations and identifying what gaps such integrations can and cannot fill. Examples of mobility integrations include partnerships with bikeshare such as BlueBikes; the concept of Mobility as a Service (MaaS); and first- and last-mile partnerships with TNCs.

This task will explore the following questions.

- a) What gaps are mobility integrations between transit agencies and other mobility providers (including other transit agencies) filling in promoting mobility for residents in metro areas in the United States and around the world, and what gaps are stakeholders hoping they will fill in the future?
- b) What new mobility providers are on the horizon and how will these providers fit into the Massachusetts landscape? What is the ideal role of the MBTA in this space?
- c) How can and will integrations help advance sustainability, equity, service, and safety beyond what transit agencies can do by operating their own service? What considerations should be made to ensure that integrations advance and do not detract from these goals?
- d) Do other agencies have policy documents around why they are pursuing integrations and how they set up these integrations? If so, what do these policies look like? What are some common elements? Are there any other think tanks or research institutes considering policies for MaaS or payment integrations?
- e) What other goals do policy makers in Massachusetts have for mobility integrations?

Objective(s)

1. Objective 1

Provide input into what mobility in Massachusetts may look like in the future. What new mobility providers are on the horizon? How will they fit into the Massachusetts landscape broadly and into the MBTA services specifically?

2. Objective 2

Understand how MBTA's peer agencies and regional/statewide transportation thinkers approach mobility and systems integration. What are the motivations for engaging in integration? What approaches do other entities take? How are outcomes measured?

3. Objective 3

Support through research the creation of MBTA policy for doing fare, payment and service integrations with other mobility providers that serve Massachusetts residents and MBTA riders. What should we think about when making this policy? Do others have a written policy on how they approach integrations? If so, what are the best practices for what to include?

Work Description

Work on this project will consist of three tasks or phases, which will build a library of information; use this information to analyze alternatives; and make recommendations for an MBTA policy addressing mobility integration. Tasks 1 and 2 will largely run concurrently, although Subtask 1.1 is foundational and will precede both tasks.

Task 1 Peer Agency Review and Case Studies

CTPS will develop a peer agency analysis corresponding to the local/regional/statewide analysis that will be developed in Task 2 and drawing on the experience of peer transit agencies that have integrated with mobility providers.

Subtask 1.1 Identification of Peer Agencies with Mobility Integration Policies

CTPS will identify seven to 10 transit agencies, both US and international, that have executed or are pursuing MaaS or mobility integrations in areas such as fares and service planning. CTPS will collect the written policies that these agencies have developed and create an assessment matrix assessing what elements are included in which plans. CTPS will then use this matrix to inform both further research into these agencies' plans (see Subtask 1.2) and interviews with MBTA staff and regional stakeholders (see Subtasks 2.1 and 2.2).

Subtask 1.2 Peer Agency Interviews and Data Collection

CTPS will interview and collect relevant documents and data from the transit agencies identified in Subtask 1.1. Areas of interest include the following:

- What role are the integrations playing in promoting sustainability, equity, service, and safety in their regions?
- What other goals do other agencies have?
- How do they assess and evaluate mobility partners?

- How do they measure success?
- What are some of the challenges they faced with mobility integrations? Do they have any recommendations for other transit agencies as they consider integration with mobility providers?
- What types of providers are they partnering with, and are there reasons why some are better than others?
- What are their plans for future integrations?

Subtask 1.3 Case Study Comparison Memorandum

CTPS will write a memorandum that summarizes the findings from Subtasks 1.1 and 1.2 and illustrates several case studies relevant to the MBTA. Questions considered will include whether peer transit agencies have been able to solve the challenges posed by local stakeholders and whether they have found some strategies or evaluation metrics more helpful than others.

Products of Task 1

1. An assessment matrix as defined in Subtask 1.1.
2. A comparative case study memorandum as detailed in Subtask 1.3.

Task 2 Regional Gaps and Needs Assessment

This task will engage regional and statewide stakeholders to pursue a gaps analysis and begin to develop the rationale for pursuing mobility integrations in the Commonwealth, and the MBTA's role in those integrations. The goal will be to identify perceived gaps in transit and mobility and develop perspectives on how mobility integrations can help close them. Using the assessment matrix developed in Subtask 1.1 to inform these interviews will give both stakeholders and MBTA staff concrete elements to consider.

Subtask 2.1 MBTA Interviews

CTPS will interview MBTA staff to review MBTA goals and vision around mobility integration, including perceived opportunities and obstacles to integrations, and what policy goals and values can be fulfilled (or potentially obstructed) by potential integrations. The interview will also include questions around the role the MBTA currently fills in the transportation ecosystem and an assessment of the strengths and weaknesses of the current structure.

Subtask 2.2 Stakeholder Interviews and Outreach

CTPS will conduct interviews with five to seven stakeholders involved in transportation policy and related fields in Massachusetts. Stakeholders to be interviewed may include academic researchers; policy thinkers; advocacy groups; and other mobility providers. CTPS will also facilitate a workshop or open house through the MPO's Transit Working Group to gain input from other transit operators and regional stakeholders.

Subtask 2.3 Regional Gaps Analysis

CTPS will synthesize the information gathered in subtasks 2.1 and 2.2 and identify the regional gaps and rationale for pursuing mobility integrations in Massachusetts based on the findings from tasks 1 and 2.

Products of Task 2

Regional Needs Assessment for Future Integrations (memorandum and table of responses)

Task 3 Policy Analysis and Recommendations

The focus of this task will be to analyze the precise policies on mobility integration adopted by peer agencies; identify the critical elements and strengths and weaknesses; relate these elements to the MBTA's goals; and make recommendations for the MBTA's mobility integration policy.

Subtask 3.1 Comparative Analysis of Peer Policies and Stakeholder Input

CTPS will compare the products of subtasks 1.2, 1.3, 2.1, and 2.2, to identify elements that are commonly shared between peer agencies and locally expressed needs. This will create an evolved version of the peer agency assessment matrix from Subtask 1.1.

Subtask 3.2 Best Practices Memorandum

CTPS will write a memorandum summarizing findings from all subtasks, identifying best practices, and making recommendations for elements to include in the MBTA mobility integration policy. The memorandum will seek to identify best practices that are also local priorities; best practices that are not identified in local feedback; elements of local feedback that are not known to be peer best practice; and how all of these elements relate to the MBTA's own internally expressed goals.

Products of Task 3

An analysis of peer best practices evaluated against MBTA's goals and recommendations for the MBTA's mobility integration policy. These will be provided in the form of a detailed matrix and memorandum summarizing both peer best practices and feedback received on mobility integration policies, evaluating those elements against MBTA goals, and recommendations for MBTA's mobility integration policy.

The Boston Region Metropolitan Planning Organization (MPO) operates its programs, services, and activities in compliance with federal nondiscrimination laws including Title VI of the Civil Rights Act of 1964 (Title VI), the Civil Rights Restoration Act of 1987, and related statutes and regulations. Title VI prohibits discrimination in federally assisted programs and requires that no person in the United States of America shall, on the grounds of race, color, or national origin (including limited English proficiency), be excluded from participation in, denied the benefits of, or be otherwise subjected to discrimination under any program or activity that receives federal assistance. Related federal nondiscrimination laws administered by the Federal Highway Administration, Federal Transit Administration, or both, prohibit discrimination on the basis of age, sex, and disability. The Boston Region MPO considers these protected populations in its Title VI Programs, consistent with federal interpretation and administration. In addition, the Boston Region MPO provides meaningful access to its programs, services, and activities to individuals with limited English proficiency, in compliance with U.S. Department of Transportation policy and guidance on federal Executive Order 13166.

The Boston Region MPO also complies with the Massachusetts Public Accommodation Law, M.G.L. c 272 sections 92a, 98, 98a, which prohibits making any distinction, discrimination, or restriction in admission to, or treatment in a place of public accommodation based on race, color, religious creed, national origin, sex, sexual orientation, disability, or ancestry. Likewise, the Boston Region MPO complies with the Governor's Executive Order 526, section 4, which requires that all programs, activities, and services provided, performed, licensed, chartered, funded, regulated, or contracted for by the state shall be conducted without unlawful discrimination based on race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran's status (including Vietnam-era veterans), or background.

A complaint form and additional information can be obtained by contacting the MPO or at http://www.bostonmpo.org/mpo_non_discrimination. To request this information in a different language or in an accessible format, please contact

Title VI Specialist
Boston Region MPO
10 Park Plaza, Suite 2150
Boston, MA 02116
civilrights@ctps.org

By Telephone:

857.702.3702 (voice)

For people with hearing or speaking difficulties, connect through the state MassRelay service:

- **Relay Using TTY or Hearing Carry-over:** 800.439.2370
- **Relay Using Voice Carry-over:** 866.887.6619
- **Relay Using Text to Speech:** 866.645.9870

Exhibit 1
ESTIMATED SCHEDULE
MBTA Mobility Integration Framework

Task	Month								
	1	2	3	4	5	6	7	8	
1. Peer Agency Review and Case Studies							A		
2. Regional Gaps and Needs Assessment								B	
3. Policy Analysis and Recommendations								C	

Products/Milestones

- A: Assessment matrix and case study memorandum
- B: Regional Needs Assessment for Future Integrations (memorandum and table of responses)
- C: Matrix and memorandum on peer best practices, feedback, and recommendations

Exhibit 2
ESTIMATED COST
MBTA Mobility Integration Framework

Direct Salary and Overhead										\$138,384
Task	Person-Weeks						Direct Salary	Overhead (109.09%)	Total Cost	
	M-1	P-5	P-4	P-3	P-2	Total				
1. Peer Agency Review and Case Studies	3.3	1.5	3.6	2.2	7.5	18.0	\$26,991	\$29,444	\$56,436	
2. Regional Gaps and Needs Assessment	4.0	1.4	2.1	4.1	7.0	18.5	\$27,794	\$30,321	\$58,115	
3. Policy Analysis and Recommendations	1.7	0.6	1.3	1.3	2.5	7.4	\$11,398	\$12,434	\$23,833	
Total	8.9	3.5	6.9	7.7	16.9	43.9	\$66,184	\$72,200	\$138,384	
Other Direct Costs										\$0
TOTAL COST										\$138,384

Funding
 MassDOT Directed PL Funds