

MBTA Advisory Board
Massachusetts Bay Transportation Authority
Capital Investment Plan Review

REPORT

Presented by the Capital Committee

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Approved by the MBTA Advisory Board

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The MBTA Advisory Board is an independent statutory organization organized under Massachusetts General Law to oversee the finances, operations, and activities of the Massachusetts Bay Transportation Authority. The Advisory Board represents the interests of the 176 cities and towns in the MBTA service district. In FY21 these municipalities will contribute over \$179 million in subsidies to the MBTA via municipal assessments.

This report is dedicated in gratitude to
Fiscal & Management Control Board Members

July 1, 2015 – June 30, 2021



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The member communities of the MBTA Advisory Board thank you!

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EXECUTIVE SUMMARY

The cities and towns of the MBTA Service District broadly support the Massachusetts Bay Transportation Authority's (MBTA) Capital Investment Plan (CIP), albeit with some recommendations and suggestions:

- Create an independent, **7-person MBTA-only Board of Directors** with municipal participation. Cities and towns will pay \$180 million in FY22 and deserve a seat at the decisions-making table.
- Re-establish an independent **MBTA Planning Department** to create a stand-alone MBTA CIP and other related documents annually.
- Publish **State of Good Repair** backlog cost estimate annually, so the public can see the progress made to make the MBTA safer and more reliable.
- Produce a **5-year CIP** and publish it annually in January, as required by law. Use words, not just PowerPoint slides to explain the plan.
- Describe what is going on with the **Fare Transformation** project. There is much confusion among stakeholders and the public about what the plan is.
- Clarify the strategy to replace the bus fleet with **cleaner vehicles**.
- Explain and accelerate the **bus facility replacement strategy**.
- Be clearer about proposals for the **North Cambridge Carhouse** and the future of routes dispatched from there.
- Get serious about the **Old Colony Line Double Track** project
- Program funding to build the **Red/Blue Connector** by 2030
- Identify and acquire land for commuter/regional/urban **rail maintenance** facilities west and south of Boston.
- Improve 2-way **municipal communication** and coordination.

These suggestions are described in detail in the report that follows.

INTRODUCTION

Again this year the Massachusetts Department of Transportation (MassDOT) has chosen to combine the Massachusetts Bay Transportation Authority's (MBTA) and MassDOT CIPs, release them later than required, and offer only a 1-year timeline, all in contravention of state law. M.G.L. c. 161a, § 5(g), paragraph 4, sentence 1 states: "The capital investment program shall be prepared on an annual basis, under the direction, control and supervision of the authority" (emphasis added). This CIP is combined with the MassDOT one and is published by the MassDOT Office of Transportation Planning on the MassDOT website. M.G.L. c. 161a, § 5(g), paragraph 7, sentence 1 states "the capital investment program shall be based on a rolling five-year plan, updated annually," (emphasis added). The CIP provided is for fiscal year 2022 only. This marks the second year in a row that the CIP horizon is one year, instead of the required five. Finally, M.G.L. c. 161a, § 5(g), paragraph 8, sentence 1 states: "The authority shall conduct a series of public meetings within 30 days of issuance of an initial draft of the capital investment program and shall submit a final capital investment program to the **advisory board**, for its review, no later than January 15 of each year" (emphasis added). The Advisory Board received the CIP on May 25, 2021 – 130 days following the due date. There was no vote to transmit the CIP to this body, only a mention of a link to the MassDot website.

The MBTA requires its own, Capital Investment Program created by its own planning staff, independent of MassDOT. MBTA capital spending, even in this truncated CIP, is the majority of the current MassDOT CIP. The total combined program for FY22 is \$3.6 billion, of which the MBTA's portion is \$2 billion, or 55%. This \$2 billion in spending deserves (and by law requires) its own investment plan. Such a process would provide significantly more transparency to what the MBTA is investing in and where. It would give cities and towns more opportunity to comment on the plan,

and work with Authority staff on worthy regional projects. Creating and submitting this plan in the winter, as required by law, will give the public, stakeholders, cities, and towns the time required to consider \$2 billion worth of projects. The current public review process is just 20 days in length.

Furthermore, it is likely that an independent, MBTA-only CIP would be much more transparent than what is presented in FY22. This CIP is confusing even to seasoned analysis and former MBTA budget-office employees. For instance, it is impossible to tell given the brief descriptions if the needed investments to improve Red Line capacity by 50% are included in this CIP or not. It is impossible, given the myriad of bus procurements, bus overhauls, and bus studies to grasp what the Authority's strategy is for bus. This CIP, unfortunately, presents more questions than answers.

In FY22, the MBTA proposes to spend over \$2 billion across the system on making the Commonwealth's public transportation network more reliable, more modern, and larger. Spending is planned across the region, with specific projects in Attleboro, Beverly, Billerica, Boston Bridgewater, Braintree, Cambridge, Canton, Chelsea, Dedham, Everett, Fitchburg, Franklin, Gloucester, Haverhill, Hingham, Hull, Lynn, Malden, Mansfield, Medford, Natick, Newton, Norfolk, Norwood, Quincy, Revere, Rochester, Salem, Saugus, Somerville, South Attleboro, Walpole, Westminister, Westwood, Wilmington, Winchester, and Worcester. Funding is planned across all MBTA modes (bus, heavy rail, light rail, ferry, commuter rail, and paratransit). Millions are also planned for back-office/infrastructure programs such as tunnel integrity, power-system upgrades, and health and safety upgrades.

PROCESS OVERVIEW

The full MBTA Advisory Board met on April 28, 2021, to receive a presentation from the MBTA's Jillian Linnell, Director of Capital Programs, entitled "CIP Update." At

this meeting, the body voted to refer the CIP to the Advisory Board's Capital Investment Plan Oversight committee for the purposes of reviewing the plan and creating an oversight report. This report represents the completion of this charge.

On May 24, 2021, the Fiscal and Management Control Board (FMCB), in joint meeting with the MassDOT Board of Directors, voted to release the FY22 Capital Investment Plan to the public. On May 25, 2021, the documents were published on the MassDOT website. MassDOT hosted 6 virtual public meetings on the entire \$3.6 billion proposal. Meetings were hosted on May 25 focused on the Berkshires/Pioneer Valley/Franklin County areas; on May 26 focused on the Northern Middlesex/Merrimack Valley areas; May 27 focused on the Central Massachusetts/Montachusett areas; June 1 focused on the Boston area; June 2 focused on the Southeastern Massachusetts/Old Colony areas; and June 3 focused on the Cape Cod and Islands areas. Public comments were due to MassDOT by June 14, with the joint MBTA/MassDOT boards voting on the proposal on June 21.

In completing this report, the Capital Investment Plan Committee met three times in May to direct staff on its preferred approach to drafting this report. At its final meeting on June 1, the committee voted to offer this report to the full body with a recommendation to accept it. Member communities were also offered the opportunity to provide brief statements which are included in the appendices of this document.

FUNDING

This oversight report only considers MBTA projects/programs. Funding for the FY22 CIP comes from a variety of sources including the federal, state, municipal, and MBTA funds. \$695 million, or 35% of funds are planned for reliability projects, which MassDOT defines as maintenance and improvements "to the overall condition,

safety and reliability of the system.” \$757.2 million, or 38% of this CIP’s funds are planned for Modernization projects, which is defined as projects which “modernize the transportation system to make it safer, more accessible, and to accommodate growth.” Finally, \$547.8 million, or 27% of funds are dedicated to expanding the MBTA footprint across the region.

Of the \$2 billion budgeted, \$792 million are MBTA funds, \$619 million are funds borrowed by the Commonwealth for MBTA projects, and \$584 million are funds from various federal sources. 98% of CIP funding is borrowed in some fashion and must be repaid by the federal and state governments, and by the MBTA.

FY22 CIP Funding Sources	(\$ millions)	%
MBTA		
Revenue bonds	515.4	25.8%
RRIF/TIFIA Loans	243.4	12.2%
Pay-Go Lockbox	30.0	1.5%
Capital Maintenance Fund	4.0	0.2%
Total MBTA	792.8	39.6%
Commonwealth		
Rail Enhancement Bonds	477.7	23.9%
Bond Cap	133.9	6.7%
Other Commonwealth Funds	8.0	0.4%
Total Commonwealth	619.6	31.0%
Federal		
Federal Transit Administration	369.5	18.5%
FTA full funding grant agreement	200.4	10.0%
Federal Railroad Administration	6.6	0.3%
Transit Security Grant Program	5.7	0.3%
Federal Highway Administration	1.8	0.1%
Total Federal	584.0	29.2%
Local/Other	3.7	0.2%
TOTAL	2000.0	

MBTA Sources: the MBTA itself is the largest funder of this CIP, utilizing \$792.8 million of its own funds to finance 39.6% of the total cost. MBTA funds come from 4 sources: Revenue bonds, RRIF/TIFIA loans, pay-go lockbox and capital

maintenance funds. At \$515.4, MBTA revenue bonds are the largest single source of funds for the FY22 MBTA CIP. Revenue bonds are debts incurred by the MBTA to 3rd parties paid back overtime with interest and secured by the Authority's revenue sources (sales tax and assessments). In addition to revenue bonds, the MBTA will borrow \$243.4 million more in RRIF/TIFIA loans from the federal government. RRIF stands for Railroad Rehabilitation & Improvement Financing, and TIFIA stands for Transportation Infrastructure Finance and Innovation Act. These financing programs allow the MBTA to borrow money at low interest rates from the federal government for qualifying programs. These funds must be repaid. The Authority also proposes to utilize \$30 million in cash from its Pay-Go lockbox, and an additional \$4 million in cash from its capital maintenance fund. This total \$34 million in cash for the CIP represents 0.2% of total funding and does not have to be paid back. As of March 2021, the MBTA owes at least \$4.4 billion in total principal and interest debt, including \$121.2 million in prior obligation debts incurred prior to 2001.¹

Commonwealth Sources: The second largest source of funds for this CIP is from the Commonwealth of Massachusetts, at \$619.6 million, or 31.0% of total. Massachusetts funds come from two sources: state bond cap, and state rail enhancement bonds. The \$60 million in state bond cap funds are state general obligation bonds provided by the Commonwealth to the MBTA. Rail enhancement bonds are also dollars borrowed Massachusetts and provided to the MBTA for certain projects such as the Green Line Extension program, Red/Orange Line

¹ <https://cdn.mbta.com/sites/default/files/2021-04/2021-04-23-sales-tax-bonds-series-a-1-a-2-b.pdf>

improvement program, and the South Coast Rail program. In total, \$477.7 million of these funds are programmed.

Federal Sources: Federal funds from five separate sources will provide \$584 million towards this CIP. The following agencies/programs will provide grants: Federal Transit Administration (FTA) funds (\$369.5 million), FTA full funding grant agreement funds (\$200.4 million), Federal Railroad Administration funds (\$6.6 million), Transit Security Grant Program (\$5.7 million), and Federal Highway Administration funds (\$1.8 million). These FTA funds flow to the MBTA under numerous programs generally authorized under a 5-year federal transportation bill. The FTA full funding grant agreement refers a different source of grant funding from within the FTA for the Green Line Extension Program. Federal Railroad Administration funds are also grants awarded to the Authority dedicated to commuter rail projects. The Transit Security Grant Program is a discretionary grant appropriation providing capital dollars to strengthen the safety and security of the nation's transit systems. Finally, Federal Highway Administration funds refer to dollars flexed to the MBTA from Federal Highway for the Green Line Extension Program. In total federal funding will contribute 29.2% of total CIP dollars in FY22.

SPENDING

Maintaining, improving, and expanding public transportation in the northeast is not cheap. The FY22 MBTA CIP programs \$2.6 billion in spending across 3 categories of spending, 18 programs of spending, and hundreds of individual projects. The 3 categories used to organize the CIP are Modernization (\$1.07 billion), Reliability (\$965.3 million), and Expansion (\$611.5 million). Each of these categories is linked to an MBTA strategic initiative or plan, such as the Transit Asset Management Plan

(TAM), Plan for Accessible Transit Infrastructure (PATI), FOCUS 40, the Safety Management System (Focus 40), and/or Rail Vision. These three categories are subdivided into 18 programs. In order of value, in millions, these programs are: Red and Orange Line Transformation (\$353.13), Green Line Extension (\$302.55), South Coast Rail (\$293.54), Revenue Vehicle Program (\$244.76), Green Line Transformation (\$230.06), Track, Signal, and Power Program (\$209.73), Bridges and Tunnels (\$169.4), Facilities (\$133.52), Stations (\$128.2), System Upgrades (\$79.65), Fare Transformation (\$72.42), Accessibility Improvements (\$67.5), Bus Transformation (\$60.64), Risk Management and Mitigation (\$33.65), Technology and Innovation Program (\$29.36), Commuter Rail Transformation (\$15.95) and other Expansion Projects (\$15.36). The 370 individual projects are then organized within these 18 programs. Definitions of these programs are below, listed by investment size.

Red and Orange Line Transformation:

A modernization priority, \$353.1 million is budgeted for the Red and Orange Line Transformation Program. Spending in this area includes vehicle and infrastructure investments to modernize Red and Orange Line service with a goal of 3-minute headways on the Red Line, and 3.5 minutes on the Orange Line. In-tunnel infrastructure is among the most important components in this spending area. Examples of projects under this designation in the CIP include \$4.59 million for the Alewife Crossing Improvements project in Cambridge, and the \$48.28 million Cabot Yard Complete Upgrade project in South Boston.

Green Line Expansion (GLX) Program

The GLX program is a well-known, and long-planned expansion project to extend the Green Line north from Lechmere Station in Cambridge to College Avenue in Medford, with a spur to Union Square in Somerville. The project will add six new stations to the Green Line and connect Somerville to the nation's largest light rail line. \$302.6 is programmed in this CIP for this project, which is scheduled to open for revenue service in late 2021. Examples of projects funded under this program include \$284.4 million for the Green Line Extension project, and \$18.11 million for vehicles related to the GLX project.

South Coast Rail (SCR) Program

Another well-know, and long-planned expansion initiative, the \$293.5 million budgeted for this program will help complete phase 1 of SCR. This initiative will see the restoration of commuter rail service to the south coast region of Massachusetts (Taunton, Freetown, Fall River, and New Bedford). SCR phase 1 is scheduled to open for revenue service in late 2023/early 2024. Examples of projects funded under this program include \$30.17 million towards a project to procure 16 new commuter rail coaches, and \$263.37 million towards the South Coast Rail expansion project.

Revenue Vehicles Program

This program will fund the rehabilitation and replacement of the MBTA's commuter rail, heavy rail, light rail, bus, and ferry vehicles. \$244.8 million is budgeted for this initiative, and will see improvements to the efficiency, accessibility, and reliability of the Authority's revenue fleets. Examples of projects in this program include \$10.63 million to partially fund the procurement of 194 New Flyer 40-foot hybrid buses, and \$75.52 million towards the procurement of 64 bi-level Commuter Rail coaches.

Green Line Transformation (GLT)

A modernization initiative, GLT will fund initiatives to modernize the Green Line's fleet, facilities, stations, and related infrastructure. \$230.1 million is budgeted in FY22 for this important initiative. The Green Line operates in Cambridge, Boston, Brookline, and Newton and is the nation's largest light-rail line. An important initiative of GLT are early action items related to procuring a new type-10 Green Line vehicle with additional capacity, improved accessibility, and upgraded facilities. Examples projected in this program include \$14.56 for Green Line B-Branch station accessibility upgrade in Brighton, and \$13.75 million for Green Line type 8 reliability improvements.

Track, Signal, and Power

Also a reliability program, this initiative will fund the repair, rebuilding, and replacement of commuter rail and transit track, signal, and power infrastructure across the MBTA system. \$209.7 million is budgeted for the Track, Signal and Power Program in the FY22 CIP. \$13.00 million towards the acquisition of CSX right-of-way property, and \$2.5 million towards the cost of Blue Line signal improvements are examples of projects in this program.

Commuter Rail Safety and Resiliency

A modernization program, the Commuter Rail Safety and Resiliency Program will fund initiatives such as positive train control, automatic train control and other such investments. \$209.2 is budgeted for this initiative, which will see infrastructure improvements systemwide. An example of a project funded under this program is \$15.92 million towards the Commuter Rail Positive Train Control project.

Bridges and Tunnels

A reliability initiative, the Bridge and Tunnel Program will fund the repair, rebuilding, and replacement of rail and transit bridges across the MBTA network. This includes heavy rail, and commuter rail bridges. \$169.4 million is budgeted for the bridge and tunnel program. Examples of projects in this program include \$1.5 million to complete the Beverly Drawbridge between Salem and Beverly, and \$6.0 million towards the Longfellow Approach project on the Longfellow Bridge between Boston and Cambridge.

Facilities

Also a reliability program, this \$133.5 million FY22 program will fund the rehabilitation and upgrade of Authority maintenance and administrative facilities in support of MBTA operations. An example of a project funded under this program is \$1.75 million budgeted towards the repair of the Von Hilleren Street wall on the border of the South Boston and Dorchester areas of Boston.

Stations

A \$128.2 million reliability initiative, the stations program allocates funds to upgrade Authority stations and parking facilities across all modes to improve the customer experience. Examples of projects funded under this program include \$8.46 million in FY22 for repairs to the Route 128/University Ave. parking garage in Westwood, near the Canton line.

System Upgrades

A \$79.7 million reliability initiative, the Systems Upgrade program will invest in many “back-office” systems including communications, security, computer technology, fare collection, asset management and environmental remediation systems. An

example of a project here is \$2.84 million to install additional automated passenger counters on revenue vehicles.

Fare Transformation

A modernization initiative, the Fare Transformation is budgeted at \$72.4 million in FY22. This program will see the installation of new technology and associated systems across all modes to replace the existing fare collection systems. This includes software and hardware. An example of a project under this program is \$3.58 million towards developing an accessible fare gate opener.

Accessibility Program

An initiative to make commuter rail, subway, and bus stations more accessible for persons with disabilities, the Accessibility Program is a \$67.5 million modernization initiative. Examples of projects in this program include \$1.35 million for Mansfield Commuter Rail Station accessibility upgrades in Mansfield, and \$12.0 million for vertical transportation (elevator and escalator) improvements at Oak Grove Station in Malden near the Melrose border.

Bus Transformation

Also a modernization initiative Bus Transportation allocates \$60.6 million in FY22 to make investments across the bus network to improve bus service. Examples of projects funded by this program include \$33.65 million in FY22 for the construction of a modern new Quincy Bus Facility, and \$2.96 million for the Columbus Ave center-running bus lane Phase 2 project in the Jamaica Plain and Roxbury sections of Boston.

Risk Management and Mitigation

An initiative focused on improvements to workplace safety and system security, the Risk Management and Mitigation Program is a \$33.7 million modernization initiative. Examples of projects funded in this program include \$0.46 million for the MBTA Transit Police's explosive dog detection program, and \$3.96 million for implementing the Authority's Safety Management System (SMS).

Technology and Innovations

The Technology and Innovations initiative is a \$29.4 million modernization program budgeted to upgrade technology infrastructure systemwide. \$4.25 million for an IT Disaster Recovery Plan for the MBTA's Operations HQ at 45 High Street is an example under this program.

Commuter Rail Transformation

Stemming from the Rail Vision process, this modernization initiative is budgeted to invest \$16.0 million in FY22 in projects envisioned to improve service across the Commuter Rail network and is viewed as a first step towards implementing the transformation envisaged in Rail Vision report. \$6.94 million for Worcester Line track improvements, including a feasibility study of the 3rd track project, is an example of this type of project.

Expansion Projects

An expansion initiative, the Expansion Projects Program will fund up to \$15.4 million in FY22 to develop expansion projects identified as "next priorities" in the Focus40 report. Examples of projects funded under this program includes \$3.85 million for improvements to the Blue Hill Ave Station in Mattapan, and \$7.04 million towards Phase 2 of the Silver Line Gateway project in Chelsea and Everett.

ANALYSIS

The Authority deserves credit for committing to spending at least \$2 billion in FY22, an order of magnitude more than was budgeted just 5 years ago. While this \$2 billion is impressive, but it should be noted that in 2019, the Authority announced that its State go Good Repair (SGR) backlog was estimated at \$10.1 billion and growing annually². The MBTA has not updated its SGR backlog estimate in 2 years, making it difficult for watchdogs such as the Advisory Board to understand what this CIP's \$2 billion in investments means in context. Annually as part of the CIP process the Authority should officially release its estimated SGR backlog, with an accompanying estimate of the impact of the CIP on it. There are also concerns about the Authority's ability to afford this CIP.

Affordability: The level of borrowing in the FY22 CIP is concerning as it adds to the Authority's massive debt load and adds pressure to its operating budget for years to come. The MBTA remains the only large US public transportation agency without a dedicated revenue for its capital program. Instead, it relies on borrowing vast sums that it repays from its operating budget. For instance, in its FY22 operating budget, the MBTA is budgeting \$467.8 million to pay back borrowed debt, principal, and interest. To fund the FY22, the Authority will borrow \$515.4 by selling revenue bonds, and \$243.4 million in RRIF/TIFFIA loans to finance its part of the CIP. This \$758.8 million in borrowed money will be paid back over the next 30 years with interest, ultimately costing well over \$1 billion to repay through 2051.³ If the MTBA

² <https://www.wbur.org/news/2019/05/13/mbta-repair-costs-transit>

³ <https://cdn.mbta.com/sites/default/files/2021-04/2021-04-23-sales-tax-bonds-series-a-1-a-2-b.pdf>

had a dedicated capital revenue source, like its peers, it could apply some of this revenue to pay directly for projects instead of borrowing. For this \$2 billion CIP, however, \$34 million are un-borrowed MBTA funds. Yet, with its immense SGR backlog, the Authority has no choice but to borrow to keep the system running. A dedicated revenue source for its capital needs appears to be the only solution to this quagmire.

Deliverability: There are also real concerns about the Authority's ability to deliver on this program in a sustainable, and effective way. On the operating budget side, the MBTA's headcount, or number of budgeted positions is poised to grow by 7% despite a 2.6% increase in spending. The \$2 billion spending planned in this CIP is 14% greater than what was planned for FY21, 20% more than the \$1.67 billion spent in FY20, and 87% more than the \$1.07 billion spent in FY19. The Authority's ability to deliver this \$2 billion program will depend on its ability to exercise and oversee contracts, work timely with 3rd parties to deliver materials, and a working global supply chain. The Advisory Board hopes that the Authority has enough project managers, engineers, attorneys, buyers, safety inspectors, construction inspectors, and other related personnel to deliver on this ambitious plan.

Modal Split:

Projects for the core network (Light Rail, Heavy Rail, Bus, Paratransit and Ferry) in-and-around Greater Boston are budgeted at \$1.2 billion in this plan. The Commuter Rail system, including South Coast Rail, are budgeted for \$931.3 million.

Mode	\$ Millions
Commuter Rail	667.9
Light Rail	533.0
System/Multiple	473.3
Heavy Rail	472.8
South Coast Rail	263.4
Bus	\$31.0
Ferries	\$6.8
Paratransit	\$0.4
TOTAL	2,648.61

\$472.8 million is budgeted for systemwide initiatives and/or technology and workplace upgrades.

RECOMMENDATIONS

The following are recommendations to the MBTA with respect to projects in this CIP, or germane to such projects.

Be More Transparent:

Publish the CIP in January when the law requires, separate from MassDOT, and with its required 5-year horizon. Publish the CIP in words, not PowerPoint slides, with descriptions of individual projects so that the public and watchdogs can understand the broad approach.

Be Clearer on Fare Transformation:

Publish, in words not PowerPoint slides, a clear and articulate strategy for the \$1 billion fare transformation initiative. Groups like the Advisory Board have a duty to oversee major initiatives such as Fare Transformation, but no one outside of 10 Park Plaza knows what the T's Fare Transformation strategy is. This CIP includes \$68.7 million in FY22 for this initiative, but since the CIP lacks a project description or cash

flows, so it cannot be understood from the document what this money will be spent on. Publish a report that details the Fare Transformation Strategy with policy decision points, project costs, and a timeline.

Interoperability

In addition, the Advisory Board urges the Authority as part of its Fare Transformation strategy to work with other transportation providers such as EZ Ride and AMTRAK around fare interoperability. For instance, if the MBTA and AMTRAK could partner on fare interoperability, the number of trains serving Providence, Route 128, Back Bay, and South Stations nearly doubles from 20 to 38 on weekdays, 8 to 20 on Saturdays, and 6 to 17 on Sundays. The State of Connecticut's Shore Line service allows its passholders to travel on certain AMTRAK trains in Connecticut, for instance. Furthermore, before COVID, EZRIDE offered public bus service from North Station to the MIT/Cambridgeport area at 4.5 minute headways on weekdays for a fare. However, since it is not interoperable with the MBTA's system, many EZRIDE customers transferring from the Orange or Green Lines are forced to pay in cash, or with pre-paid tickets instead of tapping their cards.

Explain the bus revenue vehicle replacement strategy:

Publish, in words not PowerPoint slides the Authority's policy, plans, and strategy to replace its existing fleet with cleaner, electric vehicles. Again, if there is a strategy, it cannot be discerned from this CIP. This CIP, for instance, includes funds for at least 15 projects related to the procurement or overhaul of buses. Without descriptions or cash-flows, it is impossible to understand the T's strategy. The Advisory Board understands that the MBTA wishes to move to a cleaner fleet as soon as it is feasible and reliable enough to implement, but without additional description we cannot

comprehend the steps needed to get there. Are overhauls necessary to get the fleet to a certain future point in time? What is this point? The MBTA should be much clearer in its goals with respect to cleaner buses and its strategy to get there.

Clarify and accelerate the bus facility replacement strategy:

It is understood that the existing bus maintenance and storage facilities are inadequate for the existing bus fleet, let alone the expanded and cleaner fleet of the future. Opening new, modern, and larger facilities is a requirement to operate cleaner buses. The MBTA should publish, in words, not PowerPoint slides, its bus facilities strategy in detail. This strategy should also include an accelerated timeline to replace and expand bus facilities within 10 years, not 20 as is current thinking. This CIP includes \$0.72 million to replace the catenary in the North Cambridge Carhouse, \$33.65 million towards the cost of a new, modern facility in Quincy, and \$18.73 million for a project called “Bus Facility Interim Improvements.” It is impossible for friends of the MBTA to support its bus replacement strategy and its facility improvement plans if we do not know what they are.

Explain what is happening at the North Cambridge Carhouse:

The Advisory Board understands that broadly the Authority plans to upgrade the North Cambridge Carhouse starting in 2023. As part of this plan, it will replace 28 electric trolley buses (ETBs) with 35 battery electric buses. However, in speaking to officials from Belmont, Cambridge, Watertown, and surrounding communities that host bus routes served by this facility, it is clear that many questions exist. The MBTA is urged to hold a community meeting in these communities to explain its rationale for replacing ETBs with BEBs, and to explain why it makes sense to remove catenary wires, all within the context of its published bus replacement strategy.

Get serious about the Old Colony Line Double Track

The Advisory Board applauds the \$2.5 million in the CIP for Franklin Line double track work, and the \$6.94 million to study Worcester Line improvements including adding a 3rd track in areas. The body is remiss, however, to see no funding for the Old Colony Line Double Track project. Among the most important projects to south and southeast communities served by the Plymouth/Kingston, Middleborough/Lakeville, Greenbush, and the future South Coast lines is the single-track Old Colony trunkline between Braintree and South Station. This section of track carries all Old Colony line trains and is a bottle neck in the system, often contributing to cascading delays across multiple lines. In addition, once South Coast service comes online at the end of 2023 or early 2024, numerous additional trains will begin utilizing the trunk line as well, putting additional pressure on this already busy line.

MassDOT, in the past, has suggested terminating all Greenbush and Plymouth/Kingston trains at Braintree, and increasing trains on the Middleborough/Lakeville line, presumable as South Coast Rail trains come online. The promise in this scenario is 15-minute frequencies through Braintree at peak times.⁴ It is unlikely that the towns served by the Greenbush and Plymouth/Kingston lines would support such a plan.

⁴ <https://www.enterpriseneews.com/news/20190808/train-service-to-boston-every-15-minutes-elusive-dream-in-brockton>

In 2012 the Central Transportation Planning Staff of the Boston Metropolitan Planning Organization published a study that considered double tracking the Old Colony trunk line between Braintree and South Station. This study considered using tunnels to house the Red Line along the southeast expressway, along with double tracking the Old Colony trunk line, in addition to other concepts. This study did not estimate costs or service impacts of constructing such a tunnel or project. Given the important regional nature of this project- touching on dozens of communities, we urge the MBTA to re-start its thinking and planning of ways to eliminate this bottleneck. The Advisory Board supports such a step. As state funding for major transportation initiatives such as GLX and SCR near completion, now is the time to begin the process to implement this regionally significant project.

Build the Red-Blue Connector already

The Advisory Board enjoys seeing \$3.6 million in the CIP, presumably to study the Red-Blue Connector project once again. This project would connect the Red and Blue Lines at Charles/MGH stations by extending the Blue Line from Bowdoin Station under Cambridge Street in downtown Boston. This project would open connections for residents near the northern end of the Blue Line to those areas served by the Red Line, and those communities served by the Red Line to the growing business clusters in Revere and East Boston as well as to Logan Airport.

The Authority has spent decades and millions studying this project. The Advisory Board supports the re-consideration of this project by the Authority, and/or in the next State Transportation Bond Bill. Recent plans by Massachusetts General Hospital to begin re-developing its property near Charles/MGH Station, and to include room for a station in such a development makes the argument to re-start

this project more compelling. It is time to move beyond studies and to completion by 2030.

Identify and Acquire land ASAP for Regional/Urban Rail Maintenance Facilities

As part of its rail transformation efforts, Advisory Board communities urge the Authority to begin the process now to locate, procure, develop, and operate additional regional/urban rail maintenance facilities to the south and west of Boston. As the Authority begins transforming its commuter rail service to a regional/urban rail network and replaces diesel locomotives with electric multiple units (EMUs), new and modern maintenance facilities will be required to service these trains. The existing commuter rail maintenance facility in Somerville is currently the only facility that can perform heavy maintenance on the existing fleet. Siting and operating additional facilities on the southside will eliminate the need for non-revenue moves of trainsets. In addition, the Authority will require additional rolling stock to meet its proposed frequency upgrades. A new, modern facility near Route 128 Station, or Framingham Center Station, for instance, will improve operational flexibility. The Advisory Board urges the Authority to begin this process as soon as possible, as the price of suitable parcels will only increase, while the number of suitable parcels will only decrease.

Get better at 2-way municipal communication and coordination

Many MBTA Advisory Board communities have had trouble in interacting with T staff and T consultants on projects taking place within their borders. It is possible that some of this frustration lies in the Authority's capacity to not only deliver projects, but also to communicate adequately with municipal hosts. The MBTA Advisory Board requests that the MBTA analyze its headcount to deliver its capital program, and honestly assess if it has the correct number of project managers, attorneys,

engineers, construction inspectors, safety personnel, etc. to not just deliver the projects quickly, but also to communicate adequately with local elected officials.

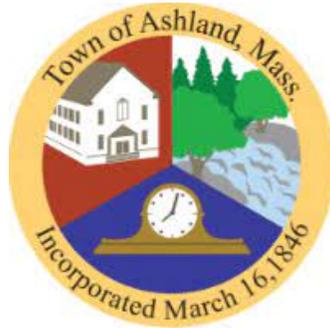
Requests for Updates on Projects

In addition MBTA Advisory Board communities request updates from the Authority on the following projects/programs:

- South Station Expansion
- Mattapan High Speed Rail transformation
- Ongoing double-track projects
- Green Line Train Protection
- PTC/ACT Implementation

APPENDIX 1: MUNICIPAL STATEMENTS (A-Z by city/town name)

Town of Ashland



The Town of Ashland wishes to note for the CIP that the Framingham-Worcester Line stations constructed in the late nineties are in need of extensive maintenance and/or renovation/replacement. The Ashland Station specifically has extensive rust and corrosion to the steel structure. This poses both an aesthetic and safety issue for riders and the community. We do not see in the CIP any plans to address the important maintenance needs of the Framingham-Worcester Line for the stations between Framingham and Worcester.

Town of Duxbury, Massachusetts



Mr. Brian Kane
Executive Director
MBTA Advisory Board
177 Tremont Street
Boston, MA 02111

May 24, 2021

**Re: MassDOT-FMCB Comments – Items D-10 (Commuter Rail Performance),
D-11 (Draft CIP), and D-14 (South Coast Rail)**

Dear Mr. Kane:

Good morning. I will address these items as one, since they are all connected to commuter rail. As Duxbury's MBTA Advisory Board Representative, I find it shocking that the T has not resumed weekend rail service to the South Shore. The \$10 weekend pass was a remarkable success which increased the T's revenues by 5%, even though fares were cut to the bone. Everyone benefitted. In five days, Massachusetts will fully reopen with no restrictions, including Fenway Park, TD BankNorth Garden, the Aquarium, restaurants, bars, you name it. In the meantime, the T seems apathetic that residents are forced to drive 50 miles roundtrip just to be stuffed onto the Red Line. Back in the 1990s, Massachusetts taxpayers anteed up \$1.5 billion to build the Old Colony and Greenbush lines. It is worth noting that -- unlike the Kingston and Middleboro lines which received 80% federal funding -- Greenbush's \$700-million price tag was fully-funded by the state. Apparently, the MBTA has ignored the fact that the Kingston and Greenbush Lines are the South Shore's railroads. We paid for them. Now, let's use them for their intended purpose, seven days a week.

Regarding South Coast Rail, the T should explain how it will move another 48 trains each weekday through the 11-mile Braintree to Boston single track, which already hosts 74 trains per day. Are they going to add time to the schedule, or combine New Bedford-Fall River trains with Middleboro trains? The preferred route via Stoughton, Easton, and Taunton won't be ready for another six or seven years, if ever. This is precisely why I have argued for years before the FMCB and MassDOT that double-tracking the remaining six miles of the Braintree to Boston segment should be prioritized in their Capital Investment Plan. As I write this, there are 15-25 minute delays on the Kingston and Greenbush lines because of "mechanical problems and train traffic." This is not uncommon. Double-tracking will allow for more frequent and dependable service, and be well-worth the investment for future generations. Thank you.

Sincerely,

Handwritten signature of Richard Prone in blue ink.

Mr. Richard Prone
MBTA Advisory Board Representative

Handwritten signature of René J. Read in blue ink.

Mr. René J. Read, Town Manager

City of Malden



www.cityofmalden.org

Gary Christenson, Mayor

June 4, 2021

Capital Investment Plan
10 Park Plaza, Suite 4150
Boston, MA 02116
masscip@state.ma.us

Dear Capital Planning Team:

As you develop your Capital Investment Plan, I would respectfully request that you include the renovation of the Malden Center MBTA Station as a priority project. Located in the heart of downtown Malden, this Station is the sixth busiest on the Orange line, serving 12,000-plus commuters daily via rapid transit, commuter rail and 13 bus routes pre-Covid. Malden in fact is the only major transportation hub north of Boston and is deserving of a major upgrade.

The station which opened in the 1970s has not seen any significant renovations for 30 years. The interior staircases are crumbling with spalling concrete posing serious tripping hazards to commuters, it is not compliant with today's ADA code, the escalator is old and the elevator functions poorly. Additionally, the outdoor plaza area is non-ADA compliant, and has deteriorating curbing and sidewalks that make it extremely difficult, if not impossible, for commuters with physical disabilities to navigate. The entrances and exits to the station are worn-out, the interior and exterior lighting is insufficient and the landscaping needs significant improvement. Further, we receive constant complaints from residents that the restrooms are consistently unable to be used.

The station sits as the "front door" to our downtown which is currently undergoing a major transformation. Private developers, Jefferson Apartment Group and Berkeley Investments, are currently investing upwards of \$300 million in transit-oriented development projects right across the street from Malden Center Station. Combined, these two projects will bring hundreds of new residents and employees to the downtown. These are in addition to the existing Malden workers who commute by public transportation. According to the 2013-2017 American Community Survey, 31.8% of them use public transit.

A Gateway City and an environmental justice community, Malden embraced transit-oriented development several years ago. The result has been the creation of some 1,600 units of new housing, some new business starts and a burgeoning restaurant scene. The City is looking to the MBTA to be a partner in this resurgence.

215 Pleasant Street, Malden, MA 02148 | Phone: 781-397-7000 Ext. 2001 | info@cityofmalden.org

Strong Past... Proud Future

Capital Investment Plan
June 4, 2021
Page 2

A new station will open up opportunities that would relieve congestion, connect residents with employment centers and housing and create new economic development opportunities. It will also generate new business for the MBTA through increased ridership.

In the past few years, the City has had some dialogue with MBTA officials and its real estate division, Greystone, in an effort to get much-needed attention paid to a Malden Center Station renovation project. The City's private sector partners have indicated a willingness to participate in an "adopt a station" program, but have indicated that said private funding would only be available after the public (MBTA) makes a significant investment in this asset. As part of our discussions, we were successful in getting the MBTA to include the station in its recent Station Conditions Analysis, the results of which have not yet been shared with the City. Our hope is that this analysis shines light on the need for a fully renovated Malden Center MBTA Station.

I would welcome the opportunity to discuss this project in further detail. Thank you for your consideration.

Sincerely,

GARY CHRISTENSON

Mayor, City of Malden

cc: Representative Paul Donato
Representative Steven Ultrino
Representative Kate Lipper Garabedian
Senator Jason Lewis

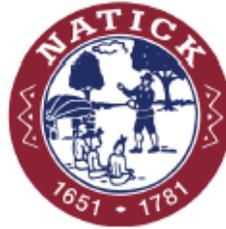
Town of Natick

Natick Select Board

Karen Adelman-Foster, Chair
Richard P. Jennett, Jr., Vice-Chair
Michael J. Hickey, Jr., Clerk
Susan G. Salamoff
Paul R. Joseph

PHONE 508-647-6410

EMAIL selectmen@natickma.org



LOCATED AT
Town Hall
13 East Central Street
Natick, Massachusetts
01760

Town of Natick • Select Board Office

Brian Kane, Director
MBTA Advisory Board
177 Tremont Street, 4th Floor
Boston, Massachusetts 02111

Dear Director Kane:

Thank you for including this letter as the Town of Natick's statement to the MBTA as an addendum to the Advisory Board's Operating Budget Oversight Report for Fiscal Year 2022.

Natick, along with our region as whole, depends on public transportation to support our economy. The MBTA is a critical partner with the Town in providing travel options for regular and occasional riders. This partnership is exemplified by the ongoing investment in a new, accessible Natick Center MBTA Station and in ongoing and future improvements to the Worcester/Framingham line that serves our community and Metro West. We greatly appreciate this partnership and these investments, and look forward to continuing this work into the future.

As the Commonwealth recovers from the COVID-19 pandemic, it is essential that the MBTA provide safe, reliable, frequent, affordable and accessible transit service for many reasons, including:

- Robust public transportation is essential to addressing equity throughout the Commonwealth by providing car-free commuting options for workers in all job sectors.
- Public transportation is an important component to reducing carbon emissions consistent with the Commonwealth's climate goals and Natick's net-zero plan.
- The MBTA provides critical rail service for the region, helping to reduce roadway congestion, which is a regional and local concern, and which may soon return to pre-pandemic levels.
- The MBTA is critical to the well-being of the regional economy and to economic and social mobility, by ensuring equitable access to employment and education.

As a public good, the MBTA -- like any public transportation agency -- requires significant operating and capital funding to fulfill its potential. The pandemic has altered the economics of

the MBTA by significantly reducing operating revenue from fares, which is likely to persist throughout Fiscal Year 2022. The phased approach to investing federal support is prudent, but ultimately not sustainable as the structural deficit that underlies the MBTA's operating budget is only temporarily addressed by federal funding.

We therefore urge the MBTA and the State Legislature to responsibly plan to cover future MBTA operating expenses with additional state funding in order to provide and sustain safe, affordable, and reliable service.

This funding support is particularly important given three cost drivers.

First is the continuing increase in MBTA staffing costs to support expanded service on the Green Line Extension, South Coast Rail and in other areas, combined with efforts to ensure competitive pay and employee retention.

Second is the increased cost forecast to implement the next generation of fare collection.

Third, unless MBTA capital projects will be reflected in other ways, future budgets must support debt service associated with significant upcoming investments needed to ensure improved service on the commuter rail network, including electrification, a third express track, full accessibility, and increased frequency of service to support the regional economy. The debt service, and its substantial impact on the MBTA's operating budget needed for these and other investments requires new funding. It is not reasonable to expect fares or member community assessments to generate the revenue to support these capital investments.

The Town is also in support of the following recommendations included in the Advisory Board report:

- Ensure that the MBTA Advisory Board is represented on the next MBTA governing board following the June 30, 2021 expiration of the Fiscal and Management Control Board.
- Offset reduced fare programs from non-MBTA revenue sources. The worthy goal of providing reduced fares to make the MBTA more equitable should be supported by non-MBTA revenue. This is particularly important on the commuter rail system.

In addition, we urge the MBTA to proactively explore and pursue a range of capital investments, partnerships, and other methods of enhancing access to, and utilization of, commuter rail stations. Access improvements include additional commuter parking, redevelopment of adjacent land, improved bike and pedestrian facilities, and many other solutions. Natick is a willing partner of the MBTA in providing access to public transit.

The Town of Natick values the opportunity to work through the Advisory Board to ensure high-quality public transportation for our community and the region as a whole. Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "Karen Adelman-Foster". The signature is written in a cursive, flowing style.

Karen Adelman-Foster, Chair

City of Newton



The City of Newton writes this Official Statement first to express sincere appreciation for the many safety and access improvements across the system. This Official Statement, however, focuses on our Commuter Rail service. Newton is the only community along the Worcester Line that continues to experience long service gaps during the day. The City calls on the MBTA and MassDOT to work to augment service at our Commuter Rail stations in Auburndale, West Newton and Newtonville by reinstating our previous Express Bus services from these station areas while accelerating permanent improvements to all three Newton stations.

The operational difficulty is that the platforms at the three stations in Newton are all only one-sided, meaning that trains must switch onto a single track before and after the three Newton Stations, in order to stop here. To stop in Newton, an outbound train toward Worcester must switch onto the southerly track before arriving at Newtonville Station, and then must switch back to the northerly track after stopping at the Auburndale Station. If there is an inbound train traveling toward Boston at the same time, one or the other train must wait while the other serves the Newton stations.

Newton had historically been served by Express Buses, that complemented our Commuter Rail service, particularly for access into and out of Boston. Our Commuter Rail concerns are significantly exacerbated by the recent modifications to the Express Buses which serve Newton. Until recently, riders relied on Routes 505, 553, 554, 556 and 558 to travel between these station areas of Newton and Boston, especially during the hours when the

City of Newton continued

Commuter Rail trains didn't stop in Newton. As part of the *Forging Ahead* process, however, Route 505 was eliminated and Routes 553, 554, 556 and 558 were all truncated and now begin and end in Newton Corner.

The ultimate solution, of course, is to rebuild the three new fully accessible ADA-compliant Commuter Rail stations in Newton - at Auburndale, West Newton and Newtonville – so that both tracks could be used, such that the MBTA could operate frequent all-day service through Newton, without the need to switch tracks or avoid stopping in Newton.

We understand that this permanent solution could take years, but we do ask that the MBTA accelerate the rebuilding of the three stations. While we wait for the renovation of these stations to be funded, designed, and constructed, we cannot expect our residents to continue to rely on the MBTA for their commuting and other travel needs when they suddenly find that the time and effort required to take public transportation between Newton and Boston has become so much less convenient and efficient. We need the MBTA to take these concerns seriously and take action to reinstate our previous Express Bus service or to provide all-day train service in the short-term, while working vigorously toward the complete and timely reconstruction of the three Newton Commuter Rail stations in Auburndale, West Newton and Newtonville.

City of Revere



The City of Revere thanks the Massachusetts Bay Transportation Authority for their sustained investment in the growth of our public transit network. The tribulations of the COVID-19 pandemic placed the MBTA's finances under immense strain but thankfully stakeholders were able to come together and avert significant service disruptions for our essential workers and metropolitan communities. This municipal statement will outline further capital projects that would offer our community and the region a heightened level of transit access and sustainability.

As the Commonwealth forges along in recovery, the City of Revere would like to advocate on behalf of the Red and Blue Line Connection. The MBTA's Blue Line offers three stops in the city of Revere and serves as a defining feature of our community's economy and character. Just a 20-minute ride from Revere to downtown Boston, the Blue Line carries about 70,000 people (pre-COVID) every day, including a significant number of service, hospitality, sanitation, and medical workers. The lack of connection between the Blue and Red lines however creates a major impediment to the region's transit efficiency and efficacy. Large numbers of Revere residents commute to Cambridge to work in a variety of roles in the medical, higher education, service, and hospitality sectors. The region's transit system as a whole would see transformative benefits from increased connectivity, and the MBTA would become a significantly more attractive option for commuters. In

City of Revere continued

tandem, firms having increased access to diverse workforces and commuters switching to public transit would propel Revere and the region towards greater economic mobility and environmental sustainability. The Red-Blue Line Connection is a regional issue for several members of the Massachusetts delegation and municipalities stretching the North and South Shores and the MetroWest region.

After the successful launch of the new Wonderland transit center in the past decade, Revere hopes to partner with the MBTA and state and federal leadership and add a commuter rail station and establish a multimodal transit hub north of Boston. There are currently limited public transportation options that allow regional connectivity for Revere residents, and all residents who rely on the Blue Line. Despite the MBTA Blue Line running just hundreds of feet from the Commuter Rail Line in some instances, there is no connection between the two transit networks. Providing access to a commuter rail station at Wonderland has a number of key benefits to the entire transportation system. Wonderland Commuter Rail Station and Blue Line pedestrian connector will support desirable modes of transportation particularly for lower-income persons, promote sustainable economic development in the region, and alleviate transit congestion during peak hours. Revere residents would also gain interconnectivity with the North Shore, promoting workforce access along a corridor previously inaccessible for our residents without access to a vehicle.

Additionally, we support the strengthening of our bus network and hope to increase connectivity along the spokes of our metro region. We look forward to working with state, federal, and MBTA leaders to deliver these projects and transform our transit network.

Town of Stoneham



The Town of Stoneham would first like to the opportunity to thank the MBTA for the opportunity to submit comments for its Capital Budget Oversight Report. The Town of Stoneham is committed to quality, accessible and reliable mobility options and believe that, although limited, its access to public transportation is a critical part of that picture. Shared public mobility is an essential nature of our vitality and its need to continue moving forward.

The MBTA bus service is a critical part of the town’s infrastructure. A bustling suburb less than eight miles north of Boston, Stoneham has a number of businesses and anchor medical institutions resulting in reserve commuters coming to town for work. So many individuals rely on this system and we consider the 99, 132, and 325 routes as critical aspects of the town’s mobility landscape. Currently, the 132 bus line is the only direct connection from Stoneham to the MBTA Orange Line. While the 132 bus is not currently listed as an amended or eliminated route in its proposed service changes, it is our understanding that the proposal maintains base service levels while reducing service on routes that have temporarily seen a decline in ridership. However, based on the FMCB November 9, 2020 presentation, the 132 is identified as a “non-essential” route and vulnerable to significant frequency reductions throughout the day. This type of change is troublesome and inconsistent with the intent of Forging Ahead to preserve transit access available to transit-critical customers. Without the 132 route, our riders have no true public transportation options.

While the current proposed changes are seen as temporary, we also understand that these types of requests may not be the last. In order to remain partners throughout this process, we need utmost transparency and the space to continue to offer feedback to best support our residents and local users. Significant service changes should not occur without notice or proper engagement. This

Town of Stoneham continued

communication piece is imperative to the process as so many members of the community rely on this service to move around the region.

We know you have incredibly difficult decisions before you and it is our hope that the above comments resonate the need to maintain our connections while keeping communication open so we may best support our community members and the MBTA as a trusted partner. We look forward to continuing this conversation as we work together on solutions.

APPENDIX 2: INVESTMENT BREAKOUTS

Investments by Mode

Mode	\$ millions
Commuter Rail	667.9
Light Rail	533.0
None/Multiple	473.3
Heavy Rail	472.8
South Coast Rail	263.4
Bus	231.0
Ferry	6.8
Paratransit	0.4
Total	2,648.6

Investments by Line/Type

Line	\$ millions
Commuter Rail	667.9
Green Line	533.0
Systemwide	473.3
South Coast Rail	263.4
Red/Orange Transform.	257.5
Bus	163.7
Red Line	126.5
Orange Line	74.9
Silver Line	67.4
Blue Line	14.0
Ferry	6.8
RIDE	0.4
Total	2,648.6

Note- categories may not be equal across tables due to the way the MBTA categorizes certain projects. For instance, the purchase of 16 Commuter Rail coaches for the South Coast Rail are categorized as an Expansion initiative, South Coast Rail Program, and under the Commuter Rail line/type.

Investments by Program

Program	\$ millions
Red/Orange Transformation	353.1
Green Line Extension	302.6
South Coast Rail	293.5
Revenue Vehicles	244.8
Green Line Transformation	230.1
Track/Signal/Power	209.7
CR Safety & Resiliency	209.2
Bridge & Tunnel	169.4
Facilities	133.5
Stations	128.2
System Upgrades/Other	79.7
Fare Transformation	72.4
Accessibility	67.5
Bus Transformation	60.6
Risk Management & Mitigation	33.7
Technology & Innovation	29.4
Commuter Rail Transformation	16.0
Other Expansion	15.4
Total	2,648.6

Investments by Initiative

Initiative	\$ millions
Modernization	1,071.9
Reliability	965.3
Expansion	611.5
Total	2,648.6