

MBTA 2023-2027 Capital Improvement Plan Oversight Report

REPORT

MBTA Advisory Board

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The MBTA Advisory Board is a government body 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 FY23 these municipalities will contribute over \$180 million in subsidies to the MBTA via municipal assessments

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EXECUTIVE SUMMARY

The 176 cities and towns in the MBTA Service District broadly support the Massachusetts Bay Transportation Authority's (MBTA) Capital Investment Plan (CIP). There is much to be applauded in the plan: continued investments in new red and orange line cars, over \$500 million for the South Coast Rail project, and hundreds of millions more for new, cleaner, buses and the facilities to maintain and operate them from. There are also areas where this plan could do better. Specifically, the lack of a cohesive strategy around rail transformation is disappointing. While there is \$50 million over 5 years to support the procurement of future regional rail rolling stock, the lack of a strategy, timeline, and location for the commuter-to-regional transition is disappointing. There is much demand for electrified, regional rail to start as soon as possible, and the MBTA owes its public a timeline and strategy for transitioning from Commuter to Regional Rail.

There is also great concern about what the future holds. A \$230 million operating budget fiscal cliff looms in Fiscal Year (FY) 2023, as does the so-called fiscal calamity capital budget deficit in FY2024 when many federal and state funds dry up. What is the MBTA's strategy to manage the fiscal cliff and fiscal calamity without service cuts?

Also considering the recent deaths at a railroad crossing in Wilmington, and at the Broadway Station in South Boston, member municipalities also legitimate safety concerns. Hundreds of millions of dollars have been spent in the past few years, yet incidents continue to occur. Is the system actually getting safer, more reliable, and efficient or not? What can the MBTA show for the public's investment, and can it categorically assure the public that the system is safe for all stakeholders?

INTRODUCTION

For the first time in many years, the MBTA proposes an independent, rolling, 5-year, stand-alone Capital Investment Plan, and we praise this action. This plan also marks the return to a document with a 5-year horizon, as opposed to the past two plans that were each one-year in duration. While the MBTA deserves credit for these advances, it must be noted that it is still in violation of Massachusetts General Law, specifically M.G.L. c. 161a, § 5(g), paragraph 8, sentence 1 which 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.” The Advisory Board received the CIP on March 24, 2022 – eighty-two days after the statutory deadline. The MBTA should either follow the law, or ask the Legislature to change the law instead of ignoring it.

The FY2023-FY2027 CIP is a \$9.4 billion dollar program encompassing 552 individual projects. Such a large plan requires more attention, scrutiny, and transparency than the current schedule or current public process provides. The Authority’s current CIP review schedule calls for a 31-day public comment period from March 24, 2022 to April 25, 2022 and three public meetings, before a scheduled authorization vote by the MBTA Board of Directors in May 2022. Thirty-one days to review \$9.4 billion requires considering \$312,903,226 each day, or \$13,037,634 each hour for 31 days straight. Certainly, meaningful oversight and scrutiny requires more time than this.

PROCESS OVERVIEW

The full MBTA Advisory Board met on March 28, 2022, to receive a presentation on the CIP from the MBTA’s Jillian Linnell, Senior Director of Capital Planning. At this

meeting, the Advisory Board voted to refer the plan to its Capital Investment Plan Oversight Committee with a charge to review the plan, write an oversight report, and make a recommendation to the full Advisory Board about the plan. This document represents the completion of that charge. The CIP Oversight Committee met on April 14 and April 21 to meet its charge, discuss an approach, and direct staff on the drafting of this document. In addition, the Commuter Rail Committee met on April 14, 2022 and the Rapid Transit Committee met on April 19, 2022 to provide additional input on specific components of the CIP and provide comments to the Capital Committee for its consideration. In addition, the Capital Committee solicited letters from all communities in the district for inclusion in this report. These letters are found at the end of this document.

The MBTA Board of Directors voted to release the Fiscal Year's 2023-2027 Capital Investment Plan to the public for a 31-day comment period at its March 24, 2022 meeting. Following this, the Authority hosted 3 public meetings on March 31, April 6, and April 12 via Zoom to discuss the plan with the public and garner its comments. In addition, MBTA staff presented early drafts of the plan at the MBTA Board of Director's Finance & Audit Committee at its meetings on January 26, February 10, and March 10. This committee is scheduled to receive a final presentation on the plan at its May 12, 2022 meeting, followed by a final vote by the Board of Directors on May 26. The plan takes effect on July 1, 2022 at the start of fiscal year 2023.

FUNDING

The Capital Investment Plan is funded, essentially, by three different sources: MBTA, Federal, and State (in order of amounts).

MBTA Funding:

To fund its share of the capital plan, the MBTA issues what it calls revenue bonds, which are loans made against its future revenue, as well as certain other types of borrowing. These loans are paid back with interest from the annual operating budget, sometimes over a 30-year period unless re-financed. For instance, this year, in 2022, the Authority is scheduled to pay off a loan from 1998. As of June 2021, the MBTA owes \$5.35 billion in debt, with the last payment on these debts scheduled for 2052. The anticipated interest on this borrowing is \$2.3 billion over the same time periods.¹ This is \$7.65 billion in debt that must be repaid from the operating budget between 2022 and 2052, assuming no additional borrowing. To support its share of the CIP, the Authority plans to borrow \$3.9 billion against its operating budget. In addition to borrowing against the operating budget, the MBTA also plans to utilize about \$500 million in surplus operating dollars to the capital budget for use in the near term.

Federal Funding:

Money from the United States government is the second-largest source of funding for the CIP. Federal funds will provide \$3.8 billion over 5 years towards this CIP, including money from the Federal Transit Administration (FTA), Federal Railroad Administration (FRA), Transit Security Grant Program, and money flexed from the Federal Highway Administration (FHWA). FTA funds flow to the MBTA under numerous programs generally authorized under a 5-year federal transportation bill. FRA 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

¹ MBTA Financial Statements and Required Supplementary Information, June 30, 2021. p. 35

systems. Finally, FHWA funds refer to dollars flexed to the MBTA via the Boston Regional Metropolitan Planning Organization (MPO). The Authority also borrowed \$850 million from the U.S. Department of Transportation in 2017 under its Transportation Infrastructure Finance and Innovation Act (TIFIA), and Railroad Rehabilitation and Improvement Financing (RRIF) programs, principally to fund federally mandated safety improvements on the Commuter Rail system. The TIFIA and RRIF loans were consolidated in 2020, and the total loan increased to over \$850 million. This loan, which has an interest rate of between 1.15% and 1.45%, will be completely paid off in 2054.² The T also holds \$420 million in Build America Bonds (BABs), which were issued in 2009 under the American Recovery and Reinvestment Act (ARRA) to create jobs and stimulate the economy.

State Funding:

The Commonwealth of Massachusetts has made a commitment to fund \$1.41 billion of this CIP from The Commonwealth's borrowed sources. The State is committed to directly funding certain specific projects such as the South Coast Rail project, and the manufacture of new Red and Orange Line cars. Each year the Executive Branch files a borrowing authorization for transportation, called a transportation bond bill with the Legislative Branch. This bill seeks authorization to borrow against future tax revenue to fund ongoing and new transportation infrastructure projects. Generally, the Legislature eventually passes a compromise bond bill, which is signed by the Governor, thus authorizing the borrowing of funds for specific projects by the Commonwealth's Treasurer and Receiver General. The Commonwealth has outstanding statutory debt of \$28 billion as of June 30, 2020.³

² MBTA Financial Statements and Required Supplementary Information, June 30, 2021. p. 31

³ Commonwealth of Massachusetts Comprehensive Annual Financial Report for the Fiscal Year Ended June 30, 2020. P. 119

SPENDING

The Fiscal Year’s 2023-2027 Capital Investment Plan programs \$9,342.5 billion to fund 552 discrete capital projects across the MBTA region, and across all MBTA modes of transportation. Funds are budgeted for static infrastructure, revenue and non-revenue vehicles, as well as for projects to expand the network. Table 1, below, describes the proposed spending by MBTA primary mode or line.

Primary Mode/Line	FY23-27 Prog (\$M)
Commuter Rail	2,693.9
Green Line	1,621.7
Systemwide	1,589.2
Bus	1,189.1
Red/Orange Lines	1,080.6
Red Line	452.4
Multimodal	188.1
Orange Line	182.9
Silver Line	117.7
Blue Line	87.0
Mattapan Line	72.1
Ferry	39.5
Paratransit	28.3

Table 1: FYs 23-27 CIP Programmed Spending by Mode/Line

Spending is also spread out across 8 broad categories: Vehicles; Guideway, Signal, and Power; Maintenance and Administration Facilities; Expansion (includes Green Line Extension and South Coast Rail); Passenger Facilities; Bridge and Tunnel; Technology and Innovation; and other Projects. Table 2 details proposed capital spending by category.

Category	FY23-27 Prog. (\$M)
Vehicles	2,313.4
Guideway, Signal and Power	2,178.9
Maintenance and Administration Facilities	1,239.7
Expansion (inc. SCR & GLX)	943.6
Passenger Facilities	920.3
Bridge and Tunnel	856.7
Technology and Innovation	579.2
Business and Operational Support	310.7

Table 2: FYs 23-27 CIP Programmed Spending by Category
Source: MBTA Advisory Board analysis

Spending can also be broken out by the phase it is currently in. The MBTA categorizes phases as either: Construction; Design; Planning; Proposed; Pre-Planning; or Closeout. Table 3 below, describes the proposed spending in these phased during the 5-year CIP.

Current Phase	FY23-27 Prog (\$M)
Construction	4,828.8
Design	2,172.3
Planning	1,320.9
Proposed	563.3
Pre-Design	426.3
Closeout	30.9

Table 3: FYs 23-27 CIP Programmed Spending by Phase
Source: MBTA Advisory Board analysis

Commuter Rail:

There are 118 projects included in the Commuter Rail category. The largest single project is \$493.5 million to fund continued work on the South Coast Rail project, to extend the Middleborough/Lakeville Commuter Rail line to Fall River and New Bedford via Taunton. The second largest Commuter Rail program is \$173.6 million to install Automatic Train Control signal cab equipment on all northside Commuter

Rail lines. Major work is also funded at both North and South Stations, the two termini of Commuter Rail. At North Station, \$157.4 million is programmed for the design of the Draw 1 Bridge replacement and expansion. Draw 1 carries all northside lines just outside North Station via a movable bridge over the Charles River. This critical reliability and modernization project will fund the design of a new, larger drawbridge which will include 6 tracks instead of 4 on the bridge itself, as well as the addition of 2 new platforms at North Station for increased capacity. At South Station, \$71.1 million is programmed for construction of new signals, switches, track, and generators to improve reliability, and improve train movements at the southside terminal. While this series of discrete projects is notable, and clearly aimed at bringing the system into a state of good repair, we lament the lack of a coherent strategy to convert the Commuter Rail system into a Regional Rail system, and call upon the Authority to take urgent action to formulate and implement such a strategy.

Green Line:

There are 52 Green Line projects in the CIP, valued at over \$1.6 billion in FYs 23-27. The largest single programmed expenditure is \$357.7 million towards the Green Line Extension from Lechmere to Union Square and College Avenue in Medford. Although this segment of the Green Line Extension project is scheduled to open later this year, funds will be needed for several years before finalization and close out. The second largest program among Green Line projects is \$311.2 million for the continued design and development of Green Line Type 10 cars. Known as the Green Line supercar, these funds will be used to continue design on the new cars which will transform the line and add significant capacity at lower operating costs. Funds are also in this CIP for a Green Line Train Protection System; infrastructure

improvements on the Green Line's central subway tunnel; street-level track, station and signal improvements; as well as funds for upgraded and improved maintenance equipment at Green Line maintenance facilities. One of the most exciting programs funded in this CIP is \$40.1 million to transform and upgrade Hynes Convention Center Station into a modern, 100% accessible station. Completing this station, along with planned work at Symphony Station will leave just Boylston Station as the last inaccessible station on the Green Line subway. We urge the MBTA to begin the design and public process to make Boylston, and all other Green Line stations and surface stops 100% accessible as soon as possible. We note the funding to make Newton Highlands accessible in this plan.

Systemwide:

Projects that span all or part of the MBTA network are categorized as systemwide investments. These projects, such as electrical power upgrades to more than one subway line, systemwide fare collection, and administrative facilities are examples. 196 discrete projects are programmed in this category, valued at over \$1.5 billion over 5 years. Many of these projects are state-of-good-repair projects, and relatively small in nature. Projects such as: heating, ventilation, and air conditioning inspection and evaluation (\$0.8), upgrades to parts warehouses, traction power substation battery replacements (\$0.5), and systemwide switch replacement (\$0.8m) are examples. The largest single project is \$420.1 million over 5 years towards the replacement of the existing automated fare collection (AFC) system. Again, this year, we seek clarity from the MBTA about concerns with the single-track section of the Old Colony line between JFK/UMass station and Braintree. Once South Coast Rail comes online, the pressure on this segment will increase. We seek reassurances that the MBTA is confident in its ability to operate additional

service over this segment with minimal interruption to existing service levels to Old Colony communities.

Bus:

This plan marks a major investment in the Authority's bus system. Over \$1.1 billion for 65 discrete projects are included in the plan. Major investments in the bus fleet, facilities, stops as well as improvements to municipal streets and signals is all included in this CIP. \$471.6 million is programmed to procure new hybrid-electric and battery-electric 40-foot buses to replace vehicles from the mid-2000's. To support these new vehicles, \$481.1 million is programmed to upgrade or to replace existing bus maintenance and fueling facilities, including the Quincy, Albany, Arborway, North Cambridge, Everett, and Charlestown facilities. \$139.8 million is programmed to overhaul parts of the existing bus fleet to help ensure service reliability, and efficiency. Over \$53.4 million is also programmed to design, construct, and operate new dedicated bus lanes, and to upgrade existing municipal traffic signals to give MBTA buses priority. Lane and TSP projects are programmed specifically in Boston, Somerville, Malden, Chelsea, Lynn, Everett, Cambridge, and Brookline. While the transformation of bus facilities is laudable, we hope the MBTA is adamant about cost containment with its contractors. Borrowed public money is not a blank check.

Red/Orange Lines:

This \$1.08 billion category will fund the ongoing procurement, testing, and commissioning of 252 new Red Line and 152 new Orange Line cars, plus upgrades to the signal system used to safely manage these vehicles while in revenue service. Funds in this category will also be used to expand and to upgrade maintenance yards and facilities to support these new vehicles. A small amount of these CIP

category funds will go towards the joint Red and Orange Line station at Downtown Crossing. The MBTA should also update stakeholders on the status of the Red/Orange line car replacement, and tunnel/Right-Of-Way upgrades to assure the public that the project is moving forward in a timely, and orderly manner.

Red Line:

The plan also includes \$452.4 million in upgrades to Red Line infrastructure. The largest project in the plan is \$185.2 million towards the rehabilitation of the approach track from the Charles/MGH Station onto the Longfellow (West Boston) bridge. Included in this initiative is new track, power, communication and signal systems, and additional emergency exits and redundant elevators. Funds are also programmed for repairs to the ageing Alewife, Braintree, and Quincy Adams parking garages. State of Good Repair projects are also programmed including improvements to cables, interlockings, tracks, elevators, signals, duct banks, and tunnels.

Multimodal:

Multimodal projects are ones that benefit more than one MBTA mode, or type of service. For instance, replacement of electrical substations benefits both heavy and light rail modes. The largest discrete project in this category is \$25.1 for improvements to trucks, brakes, motors, current collectors, propulsion and auxiliary fuses on the Blue Line and improvements to propulsion, brakes, HVAC, and doors on the Red and Orange Lines. Funding to continue the planning for the Red/Blue connector is also included in this category. The Authority owes its stakeholders an update on the Fare Transformation initiative, and the Advisory Board requests an update for its member communities soon.

Orange Line:

\$182.9 million is programmed in this category for upgrades to Orange Line track, power, station elevators, technology, and overall station amenities. The largest single project in this category is \$46.5 million for a full rebuild of Wellington Yard including upgrades to track, power, signal, communications, drainage, and other yard elements. Wellington is the principal maintenance facility for the current Orange Line fleet as well as for the new vehicles currently under testing and construction.

Silver Line:

The Silver Line is series of bus rapid transit routes operating in both Boston and Chelsea. \$117 million is budgeted for 5 projects, including \$77 million towards the procurement of 45 sixty-foot enhanced electrical hybrid buses to replace parts of the existing fleet of dual-mode articulated hybrid buses. Funding is also included for repairs and upgrades to Courthouse Station, and completion of the new Chelsea Silver Line/Chelsea Commuter Rail Station. The MBTA urgently owes communities just north of Boston, and the City of Everett specifically, an explanation for the delay in the implementation of the Silver Line Extension project. Cities such as Everett and Chelsea have permitted new construction based on MBTA timelines for the start of this service, yet the wait continues.

Blue Line:

\$87 million over 5 years is programmed in the CIP specifically for Blue Line projects. The largest single project is \$50.6 million towards infrastructure improvements across the Blue Line. This will include rebuilding the Long Wharf Emergency Egress; track and tunnel infrastructure improvements between Aquarium and Maverick; communication room improvements; and Suffolk Downs station reconstruction.

Funds are also included for improvements on the blue line cars, as well as for station and maintenance facility improvements. Please provide stakeholders an update on progress towards connecting the Red and Blue Lines, an improved multi-modal Wonderland Station, and on the elimination of trip-stops on the Blue Line.

Mattapan High Speed Line:

The Mattapan High Speed Line is a light rail line connecting Ashmont and Mattapan Stations in Boston and Milton. The bulk of the funding in this category is \$69.3 million to support the pre-design of improvements to make stations accessible, as well as for power upgrades and other infrastructure improvements to the line. There are also funds to continue the overhauls of the World War II-era light rail trollies. The Authority owes an explanation to the people of Ashmont, lower Dorchester, Mattapan and the Town of Milton about the delay in the refurbishment of the PCC cars.

Ferry:

\$39.5 million is programmed for the MBTA's Ferry service. The largest project is \$22.3 million for improvements for the Hingham Ferry dock. This project will see the replacement of the existing floating dock, access gangway, canopy, and walkways; extension of canopy structure to the Hingham Intermodal Center; and upgraded lighting, safety, and security systems. In addition, funding is programmed for overhaul work on MBTA-owned ferry vessels.

Paratransit:

Just under \$30 million is programmed for MBTA's paratransit program, The RIDE. Of this, \$18.1 million will go towards the ongoing replacement of RIDE vans and sedans, equipment of the full fleet with reliable in-vehicle technology, and procurement of a maintenance quality control consultant. Funding is also

programmed for software planning for The RIDE, and upgrades to vehicle components.

ANALYSIS

The structural deficit experienced by the MBTA since Forward Funding caused needed maintenance to be skipped, and required vehicle replacements to be delayed. Without sufficient revenue for its operating budget, necessary safety and other oversight positions were unfilled. Routine maintenance, and infrastructure upgrades were deferred and deferred again, as additional borrowing would only place more pressure on an already pressured operating budget. Because the MBTA lacks a dedicated subsidy source for its infrastructure needs, it is forced to borrow against its future operating subsidy sources, adding pressure on future operating budgets to service the Authority's substantial debt. The MBTA's current subsidy sources simply are insufficient to fund its daily, safe operation, and repay its massive debt; never has been, never will be. The MBTA is less safe than it could be because of its financial constraints, and it might only get worse. A 2021 report by the Massachusetts Taxpayers Foundation, a group not known for hyperbole, estimates that the MBTA needs \$1.25 billion annually in new revenue for its capital and operating budgets by July 2024. Without it, the Foundation reports, "the trend is unequivocal and unsettling. This is a fiscal calamity."⁴

Fiscal Cliff: March 2023:

The MBTA predicts a \$236 million operating deficit for FY2024 (July 1, 2023 – June 30, 2024).⁵ Without a minor miracle, or dramatic changes, service cuts and/or fare increases appear likely starting in July 2023. For context, in late 2020, the Authority

⁴ MBTA finances cast a long, red shadow for incoming leaders, 9/16/21

⁵ <https://cdn.mbta.com/sites/default/files/2022-03/AF%20Subcommittee%20FY23%20Budget%20Preview%203.10.22%20-%20VF.pdf>

proposed service cuts aimed at netting \$112 million in savings, which is less than half of the estimated Fiscal Cliff deficit⁶. The service cuts proposed in 2020 were:

- End all heavy rail, light rail and bus service at 12AM
- End all commuter rail service at 9PM
- End weekend commuter rail
- End ferry service
- 5%-20% frequency reduction on all remaining service.
- Cut 25, consolidate 14, and shorten 5 bus routes
- Terminate the green line E branch at Brigham Circle
- Close 6 commuter rail stations, and the Needham layover facility
- Extend wait times to 40 minutes for The RIDE
- End the suburban bus program

These service cuts were expected to net half of the operating deficit expected in the Fiscal Cliff. Also, these deficits only grow year-over-year. The MBTA is headed straight for a fiscal calamity that starts 6 months from the start of the next Gubernatorial Administration, and next Legislature. But, the budgets and plans, such as next year's CIP and Operating budget will likely be published starting next March, three months after the start of the new Administration and Legislature.

Fiscal Calamity March 2024:

As the Massachusetts Taxpayers Foundation (MTF) report points out, one year after the Fiscal Cliff, comes the Fiscal Calamity. On top of the massive operating budget deficit requiring a fix, starting in 2024 the MBTA starts facing a massive capital deficit, because specific, targeted one-time state and federal funds expire at the end of FY23. Starting in FY2024, over \$4 billion in one-time funding was granted to the MBTA for specific projects:

- New Red and Orange Line cars
- Green Line Extension
- South Coast Rail

⁶ See MBTA Advisory Board's "Forging Ahead Review" December 4, 2020

As MTF reports, by 2025 or 2026 the MBTA will be left with only its federal formula funds, \$60 million in state bond cap, and its own revenue bonds which must be repaid from future operating budgets for its capital program, unless something changes. These funds will amount to less than \$1 billion in funding starting in FY2025/6, compared with the nearly \$2 billion per year the Authority has been investing for the past few years. \$1 billion is a lot of money, unfortunately it is insufficient for the deferred maintenance needs of the system, let alone major transformations for safety, climate change, or system expansion.

Safety:

Is the MBTA safe? With recent reports of derailments⁷, collisions⁸, escalator failures⁹, deaths on the Red Line¹⁰, Commuter Rail collisions,¹¹ and numerous other issues resulting in injuries and death suggests a second look is needed. The MBTA has a history of safety concerns. In September 2019 a special panel chaired by former federal transportation Secretary Ray LaHood was emplaned to review T safety. This damning report made it clear that change was needed at the MBTA to make it safer.

Critical [Performance Maintenance Inspections] PMIs are not taking place as required. This creates a serious issue that requires immediate attention and this information has already been shared with MBTA leadership. Over the years, due to shortage of and/or inexperienced leadership, competing priorities and fiscal controls, operational managers have had difficulty identifying what maintenance and inspections need to be done, or have been dropped due to fiscal pressures or lack of staffing. Furthermore, there is little, or in many cases, no data to support what maintenance and inspections are required, or what has been accomplished. In other instances, procedures are well documented and available, but are not enforced by local supervision. It also does not appear that sufficient condition assessments have been conducted on many system assets that may drive a higher

⁷ Boston Globe: "MBTA Among nation's worst for derailments, records show" 6/11/19

⁸ Commonwealth Magazine: "T gets/gives updates on collision, derailment" 9/21/21

⁹ Boston CBS: "9 hurt at Back Bay MBTA station after escalator malfunction" 9/27/21

¹⁰ NBC Boston: "Man dead after being dragged by Red Line Train" 4/10/21

¹¹ WCVB TV: "Wilmington woman killed after vehicle collides with MTA train" 1/23/22

level of preventive maintenance actions. This will require leadership's urgent attention to identify what inspections and maintenance must take place, at what intervals, and establish performance indicators that show progress against stated goals

Safety Review Panel Final Report, December 9, 2019 p. 4

Two-and-a-half years later, the public has the right to ask if anything has changed? Millions have been invested in the past decade in MBTA infrastructure, yet what is there to show for these investments? Is the system safer, more efficient, more reliable, easier to use? It remains unclear. Within reason, the public deserves reassurance that the system is safe. MBTA leadership has a public duty, over and above any duty to any elected official, to the public regarding the state of the MBTA's safety, and reliability.

Wants and Needs:

Faced with a pending operating deficit next year, a calamitous capital deficit the year after, and lack of clarity around safety, the MBTA finds itself in difficult situation to say the least. To assist in this, the Advisory Board recommends the following:

- Commit to piloting platform edge doors at a subway station in the next 5 years. This critical safety measure can not only prevent injuries and deaths, it has the potential to make stations cleaner, and more inviting.
- Establish a \$50 million over 5 years fund to maintain and refurbish local commuter rail stations in coordination with municipalities.
- Publish an updated State of Good Repair (SGR) backlog and estimate the effect of annual CIPs on this number over time.
- Explain what is really going on with Fare Transformation
- Commit to maintaining current service levels on all modes. Cities and towns are now required to permit more high-density development near T stations.

All parties have an interest in reducing parking at these new developments, and reducing vehicle miles traveled. To achieve this, however, cities and towns need a commitment from the MBTA that sufficient service will be available to support the people living in this new housing.

- Establish a middle-to-long-term project planning office dedicated to the MBTA

CONCLUSION

Perhaps the transition from fossil-fuel propelled transit to electricity-propelled buses, trains, ferries, and paratransit vehicles is too much for the MBTA to manage on its own. There was a time within living memory when the T could transform itself- in the 1980's, it put the Orange Line underground while extending the Red Line on either end, and rebuilding the southwest corridor rail line, diverting all southside traffic and re-creating the Fairmount Line. This was done largely with internal MBTA-led planning, procurement and project management. Perhaps the MBTA of the 2020's cannot match the MBTA of 40 years ago and simultaneously electrify its bus and regional rail networks; launch modern Red and Orange Lines with new, modern signals at stations with platform edge doors; while also expanding its ferry service, procure and deploy larger Green Line trains to expand capacity; revolutionize paratransit; and expand the ferry system.

The cities and towns of the MBTA Advisory Board district oppose service cuts above all. Especially at a time when the Commonwealth is mandating increased density in our communities based on proximity to MBTA service, the MBTA and Commonwealth cannot turn around and then remove said service. 2023 and 2024 will be difficult. The next administration will come into office faced with tough choices not just in public transportation, but across state government. The MBTA's

municipalities hope things can improve and the operating and capital budget estimates are less terrible than predicted.

APPENDIX 1: Summary of MBTA Questions/Concerns from this Report:

- When can the public expect a timeline and strategy document on the transition from Commuter to Regional Rail?
- What is the strategy for managing through the fiscal cliff and the fiscal calamity without service cuts?
- What can the MBTA show for the public's hundreds of millions in safety investments in recent years? Can and will MBTA leadership categorically assure the public that the system is safe for all stakeholders?
- Abide by all aspects of M.G.L. c. 161a, § 5(g) and publish the CIP when required by state law.
- Provide more than 31 days to review such massive spending plans.
- Begin the design and public process to make Boylston, and all other Green Line stations and surface stops 100% accessible.
- Reassure the public that the opening of South Coast Rail will not effect service levels, or schedule adherence for other South Coast Rail communities, especially with respect to the single track segment in Braintree, Quincy, and Dorchester.
- Be diligent around cost containment when building new bus maintenance facilities.
- Provide an update on the Fare Transformation initiative.
- Move faster on the Silver Line Extension.
- Update stakeholders on the Red/Blue Connector

- Begin design of a new, multi-modal, Wonderland combination Blue Line/Regional Rail station.
- Start the initiative to replace trip-stops on the Blue Line with new, modern signals.
- Provide an explanation and new timeline for the refurbishment of the PCCs, and upgrade of the Mattapan Line.
- Commit to piloting platform edge doors at a subway station in the next 5 years.
- Establish a \$50 million over 5 years fund to maintain and refurbish local commuter rail stations in coordination with municipalities.
- Publish an updated State of Good Repair (SGR) backlog and estimate the effect of annual CIPs on this number over time.
- Commit to maintaining current service levels on all modes
- Establish a middle-to-long-term project planning office dedicated to the MBTA

APPENDIX 2: Municipal Statements:



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Delivered via email to: bkane@mbtaadvisoryboard.gov

Official Statement from the City of Newton

Dear Director Kane,

The City of Newton begins this Official Statement with our sincere appreciation for the many safety and access improvements across the system during an extraordinarily difficult period. This includes the extensive track and signal work on the Green Line here in Newton.

The remaining focus of the City of Newton Official Statement is on the reconstruction of our three Commuter Rail stations in the medium-term and improved express bus service immediately.

Newton is the only community along the Worcester Line that continues to experience long service gaps during the day in commuter rail service. The City has previously called on the MBTA and MassDOT to work to accelerate permanent improvements Newton's three Commuter Rail stations in Auburndale, West Newton and Newtonville in order to augment service and to provide accessibility. In the meantime, we continue to call on the MBTA to reinstate our previous Express Bus services from these stations.

Newton is thrilled that the MBTA has made significant progress on the design for upgrading the three Newton Commuter Rail stations. The MBTA has confirmed funding through final design for the stations and is committed to completing the design in 2023.

We are now focusing on construction funds with the help of Congressman Jake Auchincloss, Senator Cynthia Creem and State Representation Kay Khan. We have spoken with the MBTA about MassDOT / MBTA providing funding as well as the MBTA pursuing major federal grants through the Bipartisan Infrastructure Law; the MBTA is targeting the upcoming All Stations Accessibility Grant. **We would like to continue working with the MBTA to pursue grants for this important project until construction is fully funded.**

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. Not only does Newton have limited service but our platform configuration impacts the speed of all the other trains.

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

hours when the Commuter Rail trains did not stop in Newton. As part of the Forging Ahead process, however, 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 with three new fully accessible ADA-compliant Commuter Rail stations with two platforms each 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.

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 bus 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, even while working vigorously toward the complete and timely reconstruction of the three Newton Commuter Rail stations in Auburndale, West Newton and Newtonville.

In closing, we are grateful to be part of the MBTA network and look forward to continued collaboration.

Sincerely,



Ruthanne Fuller
Mayor, City of Newton



Town of Lexington

Town Manager's Office

James J. Malloy, Town Manager
Kelly E. Axtell, Deputy Town Manager

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April 26, 2022

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

Dear Mr. Kane:

We appreciate the opportunity to provide a statement to the MBTA as an addendum to the Advisory Board's operating Budget Oversight Report. It is imperative that as we look at the costs of providing public transportation, we also examine the benefits of this critical public good. We urge the MBTA and the State Legislature to plan to cover future MBTA operating expenses with additional state funding to strengthen and sustain service.

There are significant returns on investment in public transportation, even in an outer core community such as Lexington. Many of our Lexington businesses depend on the MBTA, whether it is baristas, grocery clerks, restaurant workers, MIT Lincoln Lab employees or tourists arriving by bus, or our life science clusters using shuttles that connect them from Alewife; economic development depends on public transportation. Many of our businesses are eager for greater transportation services. Though an "outer core" community, the MBTA is still a vital part of Lexington and will be even more critical as our economic development and workforce housing opportunities expand.

Public transportation is also vital for expanding mobility for people of all ages and abilities, including our most vulnerable. Investing in System Wide Accessibility and enhancing transportation allows more people to make use of the MBTA rather than more costly alternates.

We appreciate the in-depth report on the CIP provided by the MBTA Advisory Board and have some additional comments:

- We believe efforts to electrify commuter rail and move to a more frequent regional rail system are warranted sooner than later. For a bus-only community such as ours, surrounded by neighboring rail communities, we can eventually create options for better connecting people to these rail lines further reducing congestion and emissions and enhancing mobility.
- As we support efforts to create frequent, reliable, electrified regional rail, it will be important to examine the fare structure of rail. Fares on rail are quite high. We also understand the argument for reducing fares on other MBTA services. Finding ways to support our most vulnerable, connecting

them with services, and also enhancing ridership are worthwhile goals. That said, this cannot be done without an external source of funding.

- Paratransit is an immensely valuable service for those who need it, yet it is incredibly expensive to operate – no matter who operates it. As such, we encourage further investments to increase accessibility on all modes of the MBTA. Additionally, we suggest the MBTA work with the Massachusetts Executive Office of Health and Human Services and other providers of human service transportation to see if there may be opportunities to join forces on demand-response services. Opportunities to blend and braid multiple sources of funding continue to grow, and this seems worth investigating.
- We are eager to see what comes with Bus Network Redesign and look forward to the plan that is supposed to come out Summer 2022. Having a clear plan for levels of bus service and greater connectivity across town borders will be important as communities outside of Boston continue to expand their commercial base and housing opportunities. We need to know where bus service will be and what levels of service will be committed to.

We are proud to be an MBTA member community and look forward to being active partners in enhancing transit services and moving more people towards a multi-modal future.

Sincerely,

A handwritten signature in blue ink, appearing to read "James Malloy".

James Malloy
Town Manager

Cc: Lexington Select Board
Melissa Interest, Human Services Director
Susan Barrett, Transportation Manager



CITY OF REVERE

Brian M. Arrigo
Mayor

April 20, 2022

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

Dear Members of the MBTA Advisory Board,

The City of Revere urges the Advisory Board to support the MBTA's investing in the Wonderland Commuter Rail Station and Multimodal Connector. Revere is concerned about the lack of investment in the Wonderland Multimodal Station, a project that has already secured millions from diverse funding sources.

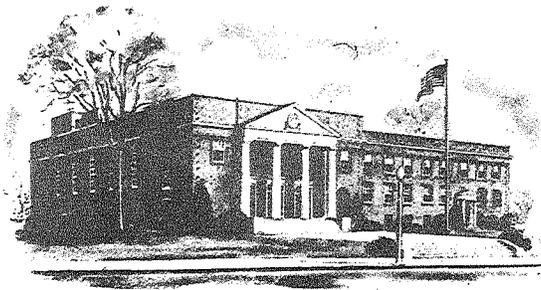
The Wonderland Multimodal Station will offer a commuter rail station within the City of Revere, which holds the unfortunate distinction of being the only community north of Boston through which the Newbury and Rockport Line passes but does not stop. The station itself will allow for improved connectivity across the North Shore and a larger supply of a vital, transit-dependent workforce. Especially impactful would be a pedestrian connection from the commuter rail to the Blue Line terminus at Wonderland Station, only a distance of about 1000 feet. Instead of North Shore commuters driving down and parking at Wonderland to then take the Blue Line, they would be able to seamlessly take the train to the subway into downtown Boston and beyond.

The current CIP lacks as significant an investment in multimodal projects as is necessary to elevate the region's connectivity. Already home to not only the Blue Line but also a host of buses that travel across the region, Wonderland Station is poised to become a crucial transit hub. Unlocking this potential will reduce traffic on state roads heading north while promoting the sustainable transit patterns that are necessary to combat climate change.

The Wonderland Multimodal Station has recently been dedicated \$4 million dollars by the U.S. Congress, thanks to Senator Ed Markey and Assistant Speaker Katherine Clark. The project has also had funding for several years through the Commonwealth's Transportation Bond Bill. At this point, only the MBTA is missing from the table to initiate this project. Thank you for your consideration as we work together to advance safe, reliable, and transformative transit projects for the benefit of our residents.

Regards,

Brian M. Arrigo



TOWN OF STONEHAM

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SELECT BOARD

April 12, 2022

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

Dear Director Kane and members of the MBTA Advisory Board:

The Town of Stoneham would first like to take the opportunity to thank the MBTA for the opportunity to submit comments for its fiscal 2023 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 region's vitality and its need to continue moving forward.

Stoneham applauds the thoughtful consideration of the CIP, particularly in its prioritization for planned capital expenditures. The Town fully supports the two overarching priorities, which help shape the overall strategy for capital investment:

- Improve reliability of the system and modernize existing assets to accommodate current or anticipated growth.
- Make targeted investments in the expansion of the transportation network, in an effort to increase capacity or multimodal options.

These priorities are directly in line with the Town of Stoneham's work to address first- and last-mile solutions, add capacity to existing MBTA bus service, and expand options for people who live, work, and enjoy the region.

Stoneham has less transit access than other surrounding communities. The town does not have a commuter rail station, but residents have access to the Lowell commuter rail stations in Winchester and Woburn and the Haverhill commuter rail stations in Wakefield and Melrose by car. Residents

are able to access the Orange subway line at the Oak Grove Station in Malden, which is accessible by car, bicycle, and the MBTA Route 132 bus from Redstone Shopping Center in Stoneham.

The Metropolitan Area Planning Council (MAPC), the regional planning agency that serves the 101 communities of Metro Boston, collaborated with cities and towns in the North Suburban Planning Council (NSPC) to conduct a suburban mobility study in 2017. The study concentrated on non-single occupancy vehicle options for serving the first- and last-mile of transit work trips in the sub-region. These options include better coordination of existing transit services, employer-sponsored shuttles, new locally operated public transportation services, partnerships with private sector transportation network companies, and improved pedestrian and bicycle connections among transit, residences, and employment centers.

This study's findings revealed that there are more work trips of residents commuting within the sub-region than there are work trips commuting to Boston and Cambridge as employment has become distributed within the Metro region. In Stoneham, there is a singular MBTA bus route running north/south but no shared transportation traversing east/west. This is a significant mobility gap connecting those who work and travel within the area to nearby employment and transportation centers. Further, in the study, employers noted the difficulty of workers in retail, hospitality, and restaurant sectors using the existing transit services, which are designed more for commuting into Boston and which may not properly serve second and third shift workers. The area's high cost of housing prices out many of those sector employees and without reliable, reasonable mobility options, these types of businesses have struggled to stay competitive and even remain open since the pandemic.

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 reverse 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. Previously, the 132 bus has been identified as a "non-essential route" and susceptible to 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.

As a community, Stoneham has grown a great deal over the past decennium and made large strides in developing municipal tools for housing development. The municipality has been designated twice as a Housing Choice Community for its added housing stock over the past few years. From

the town's Housing Production Plan, slightly more than half (57.1%) of units are single family homes, and the remainder are in structures that contain more than one unit. Nearly half (47.1%) of the multifamily units are in larger developments with at least 20 units, and another 18.5% of the multifamily units are in buildings with 10-19 units. These types of higher density developments yield great opportunity to create transit nodes within neighborhoods.

Stoneham is a Housing Choice Community and we are proud that this is our second designation of this status in the Commonwealth. A key requirement of this status is that housing production supports two key attributes of the 21st century workforce: (1) workers desire to live in housing that reflects transit-oriented design, and (2) workers do not have to personally own a vehicle. In the past five years, Stoneham has seen significant growth in multi-unit developments with over 600 units of housing coming online, with a majority of those units residing in the southeast part of town at Executive Park in Stoneham which is the existing terminus for the Route 99 bus. The town of Stoneham considers this density and immediate access to the Middlesex Fells, Stone Zoo, Spot Pond, and other regional assets as ideal for expanded shared public transportation.

Finally, Stoneham community members support the ongoing work through the Transportation Climate Initiative (TCI) collaboration. Residents and members of our business community continue to invest and seek alternative methods of transportation in order to become less dependent on personal vehicle use through its improvements with Complete Streets, Shared Streets, and the recent opening of the Tri-Community Greenway. We firmly believe that this greater reliance on shared mobility can only work by maintaining service days and the frequency of our existing bus service which directly supports the statewide goal of reducing emissions while further advancing the clean energy economy.

The Town of Stoneham values the opportunity to work together with the Advisory Board to yield a variety of multi-modal shared transportation options for our community and the region as a whole. We look forward to continuing this conversation as we work together on solutions.

Very truly yours,



Stoneham Select Board

COHASSET TOWN HALL
41 HIGHLAND AVENUE

COHASSET, MA 02025



OFFICE OF THE
SELECT BOARD
781-383-4100 Ext. 5101

The Town of Cohasset is grateful to the MBTA Advisory Board for the comprehensive Oversight Report on the MBTA Capital Investment Plan (CIP).

We wish to echo the concerns brought forth in the Oversight Report, specifically the **lack of meaningful electrification investment** and **many significant safety concerns**, which are of particular importance to our town. Cohasset is on the Greenbush line, has six street crossings, and a significant number of residents who live within yards of the rail. Many of the homes were built along the MBTA right of way during the decades that the rail was suspended.

Specific concerns include:

- There are a total of 26 Greenbush line trains (13 inbound/13 outbound) that come through Cohasset each weekday. These diesel-powered locomotives expel smoke which envelops the adjacent homes and neighborhoods; to make matters worse the Greenbush line only has one track, requiring a few bypass locations including one in Cohasset. We often have trains idling for 5-10 minutes right next to homes. This creates significant noise and air pollution. In addition, diesel-powered locomotives have reliability far below their electric-only counterparts.

We urge the MBTA to increase its investment in rail electrification on the Old Colony network.

- When the Greenbush line was built and cut through residential neighborhoods, fencing was added in order to increase safety and keep residents, children, and pets separated from the rail lines. That fencing has deteriorated to the point where there are significant gaps in many places or sections that are missing altogether.

Building adequate fencing was part of the MBTA's commitment to communities. The MBTA must make renewed investments in fencing which has far exceeded its lifespan.

- Cohasset is effectively divided into two halves by the Greenbush rail line, with one half being separated from state route 3A. As a coastal community with significant storm vulnerability, we often lose electrical power. During recent winter storms when we experienced power loss, **the rail crossings' backup power systems were not sufficient, resulting in the crossings failing into the 'closed' position.** Cohasset has six rail crossings throughout Town and this electrical failure prevented our residents and emergency responders from being able to access one half of town. This forced residents to make

dangerous maneuvers around the crossing gates until Cohasset Police were dispatched to manually monitor the crossings. This is an unacceptable safety issue, particularly for a small community with *six* crossings.

The Town of Cohasset urges the MBTA to make meaningful capital investments to permanently resolve issues relating to back-up power systems at the rail crossings and other rail crossing infrastructure. This is a safety concern of paramount importance to our community.

We appreciate the cooperation we've enjoyed with the MBTA Advisory Board, particularly during the past few years as we worked collaboratively to maintain appropriate service to the region through the Greenbush commuter rail line and Hingham and Hull commuter boats. It is more important than ever that our communities and the MBTA Advisory Board continue to work together to address the capital needs of our vital transportation systems, ensuring continued successful operation of these systems and prioritizing the health and safety of our residents and commuters.

Thank you for your service.

Sincerely,

A handwritten signature in cursive script, appearing to read "Keri Thompson", with a long horizontal flourish extending to the right.

Keri Thompson, Chair
Cohasset Select Board

cc: Senator Patrick O'Connor
Representative Joan Meschino