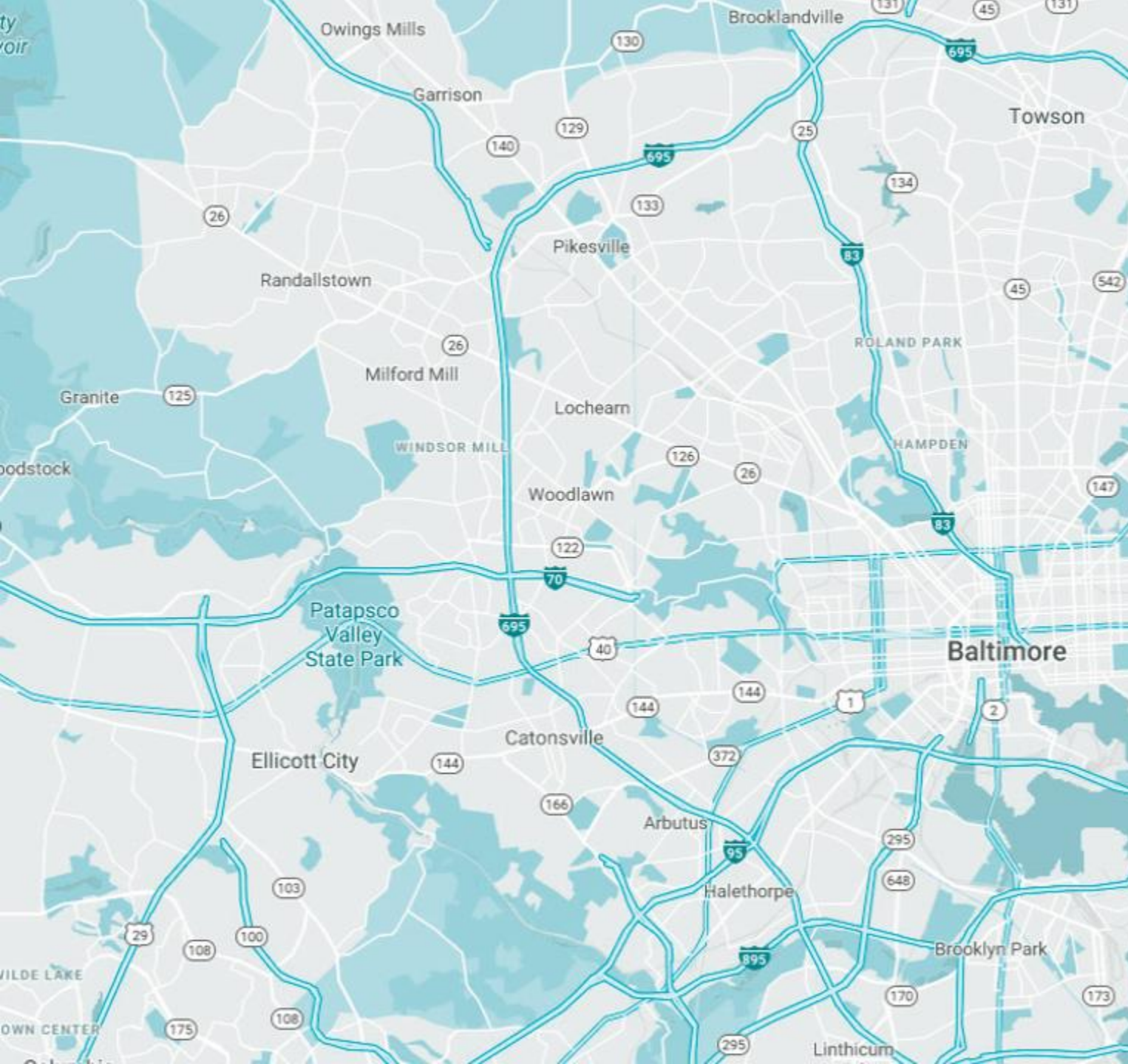


Existing Structure and Services

Baltimore Region Transit Funding and Governance Study

February 23, 2021





Today's Agenda

- 1 **Where We Are**
- 2 **Existing Structure**
- 3 **Implications for Alternatives**
- 4 **Peer Review and Analysis**
- 5 **Next Steps**

Study Progress..

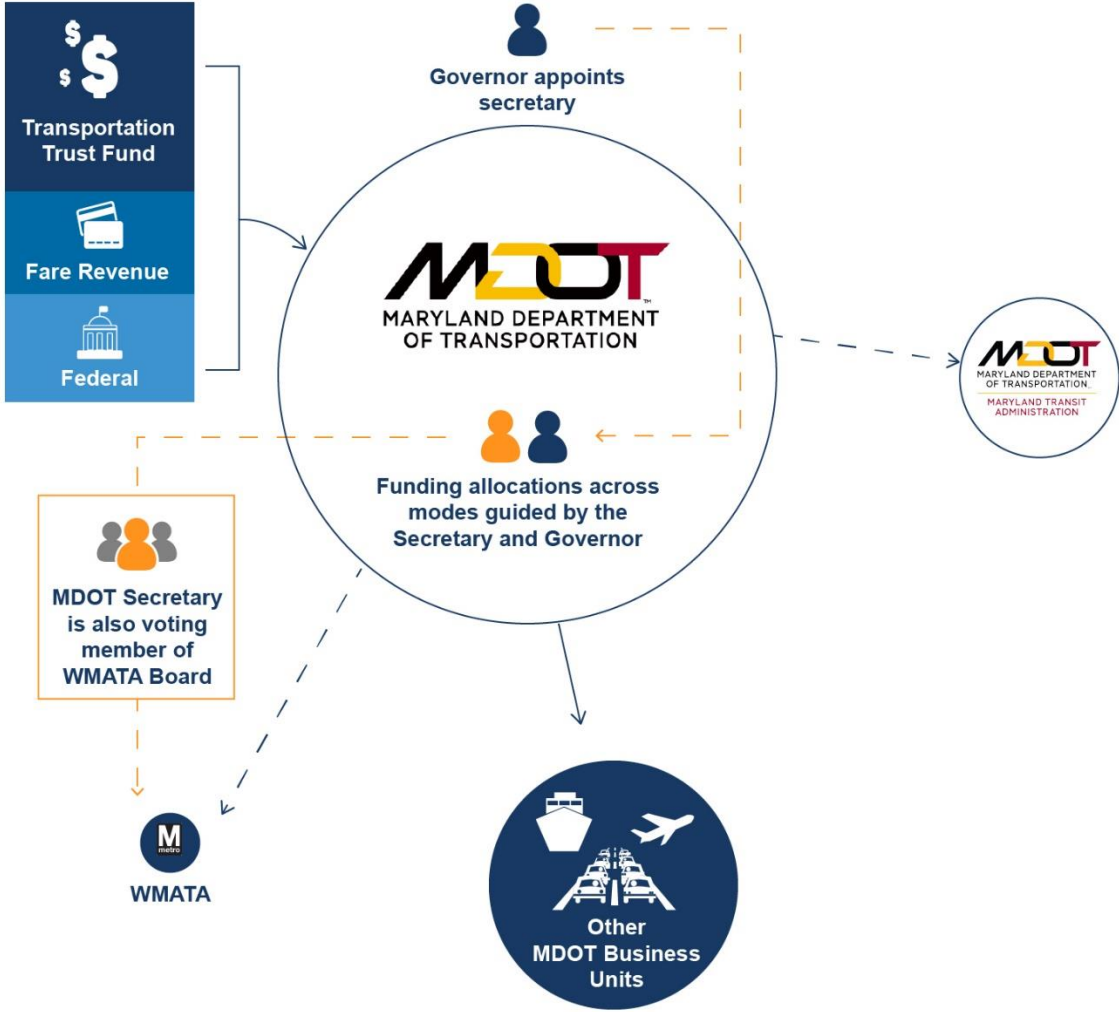
1. History of MDOT MTA and the LOTs System
2. Review of Current Status ←
3. Financial Review
4. Review of Peer Agencies / Regions
5. Review of Transit Funding Measures
6. Options for Governance and Funding

❖ Ongoing Stakeholder Engagement

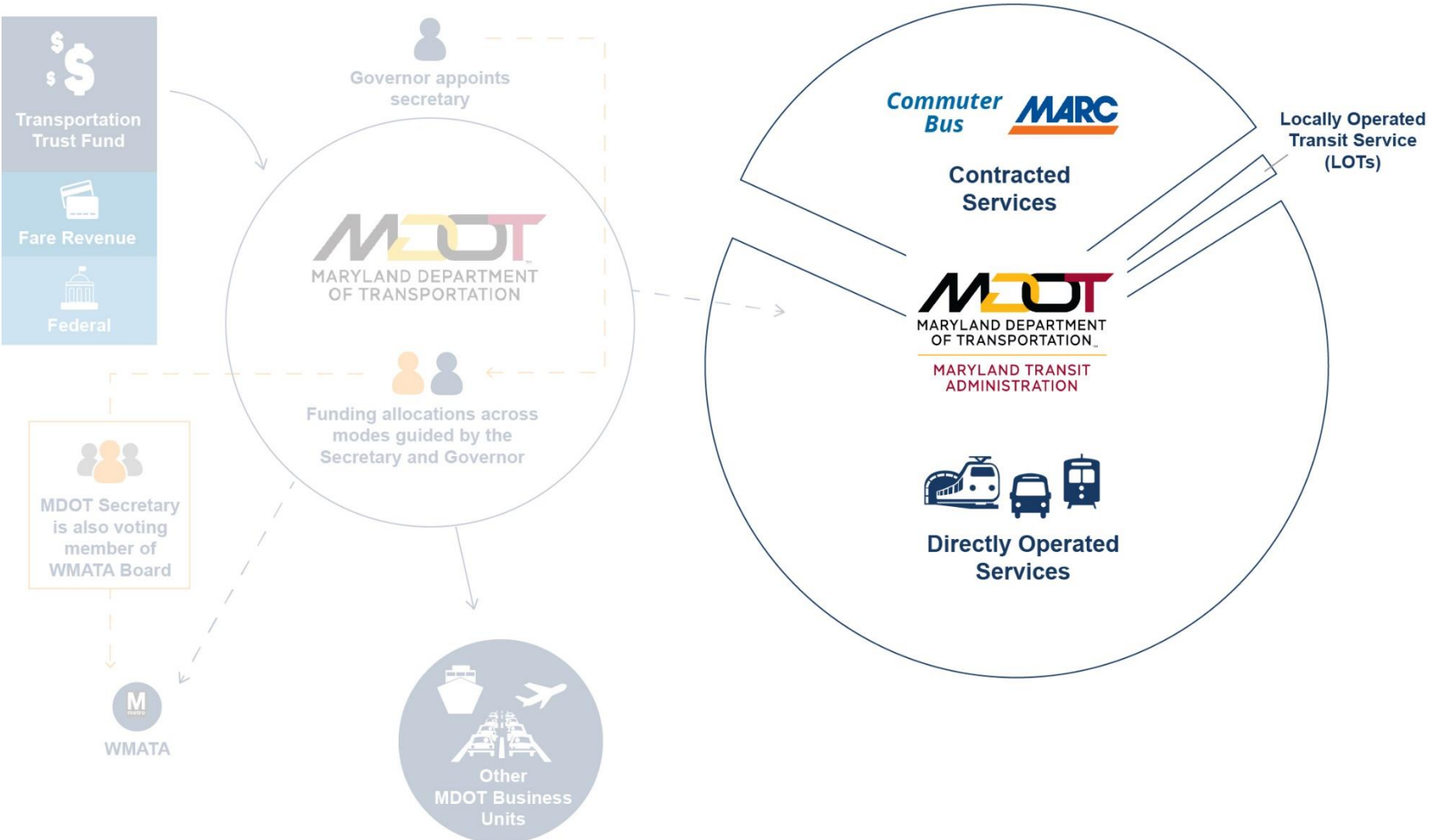
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Existing Structure

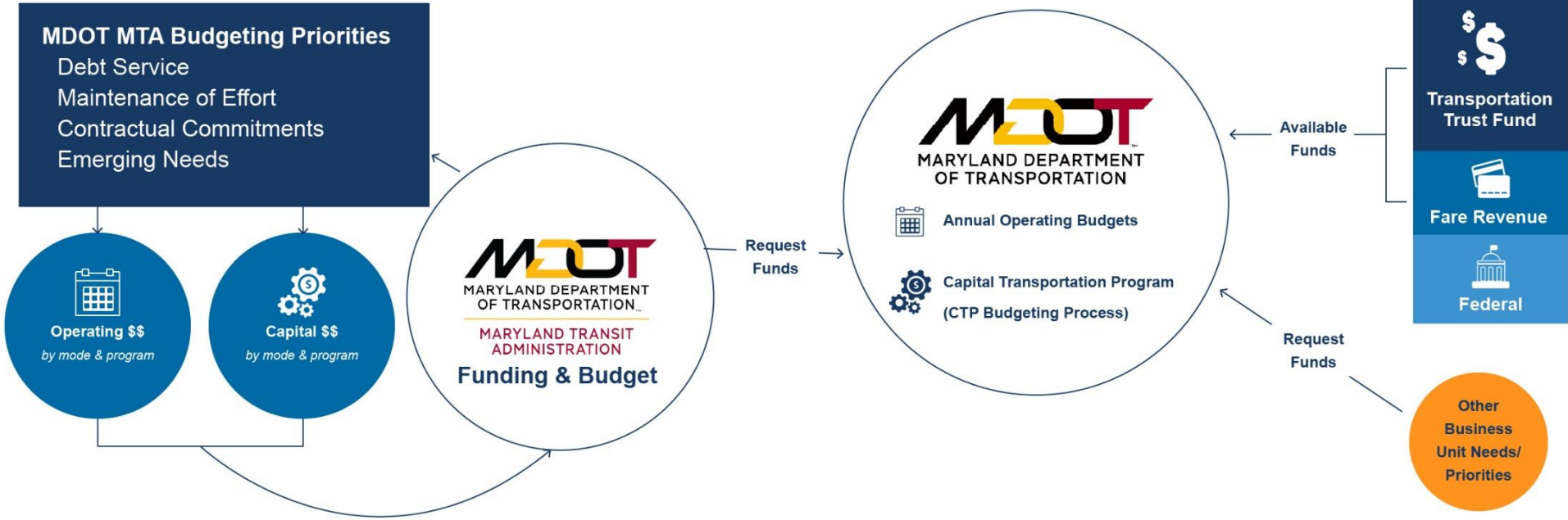
Existing Operating Structure



Existing Operating Structure



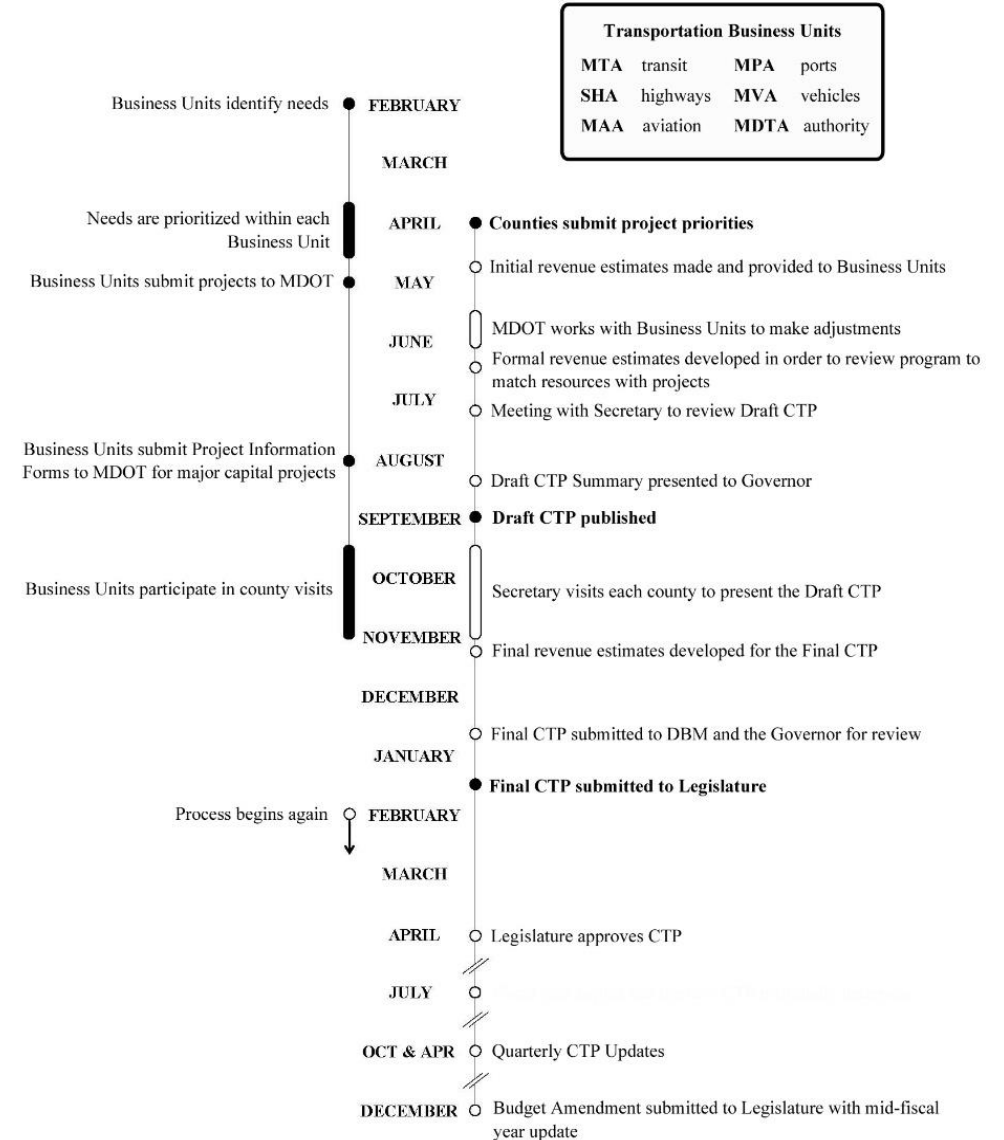
MDOT and MTA Budgeting Process



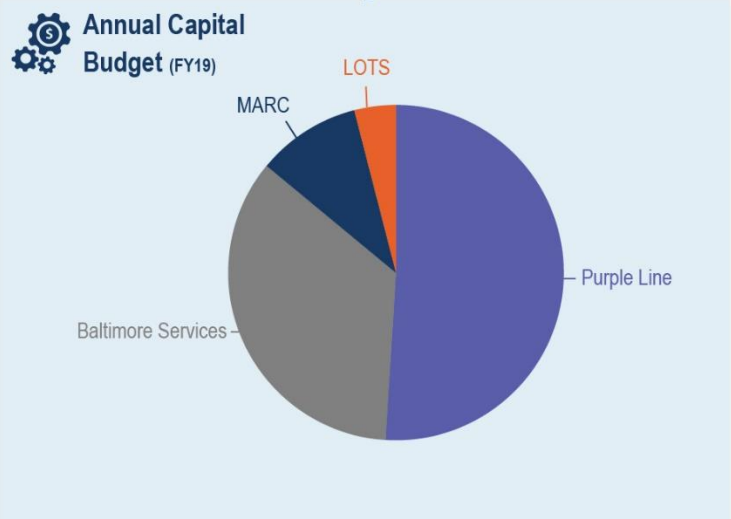
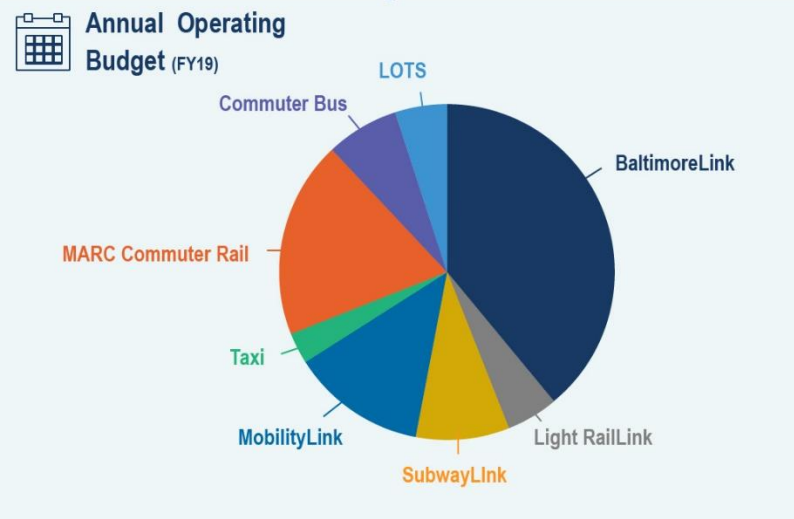
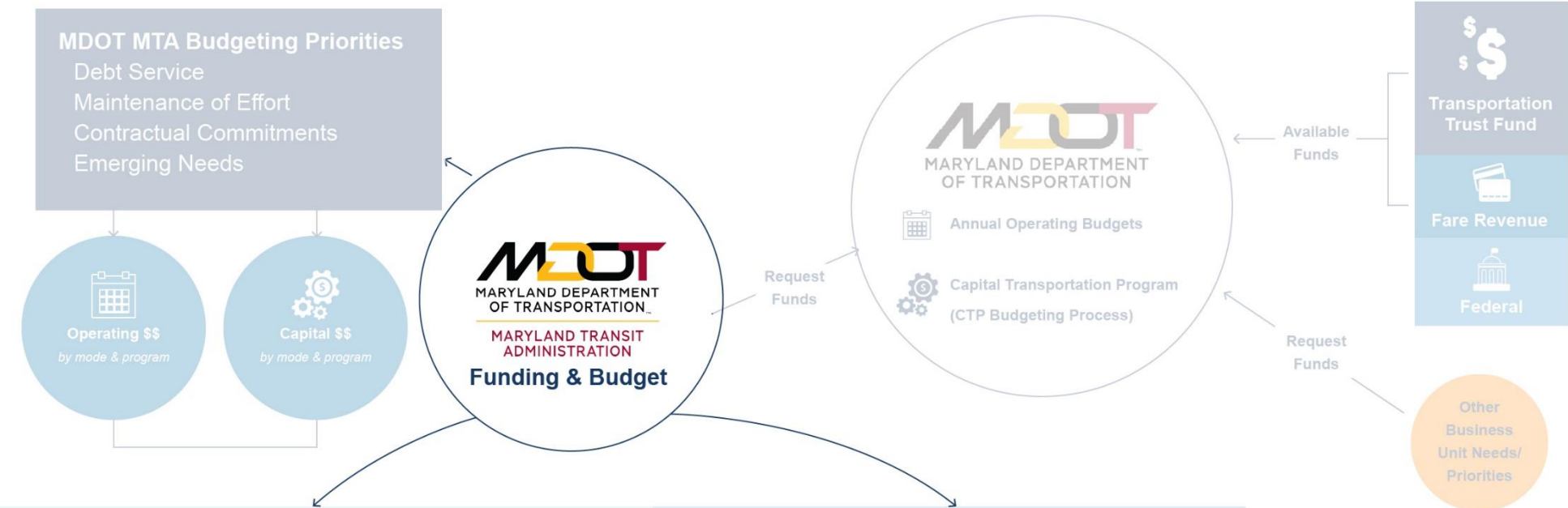
Annual CTP Process

- Initial revenue estimate
- Outreach with communities (CTP Tour)
- Priority Letters (from communities)
- Submitted to the Department of Management and Budget and Governor
- Presented to General Assembly

CTP Development Process
Maryland Department of Transportation - December 2015

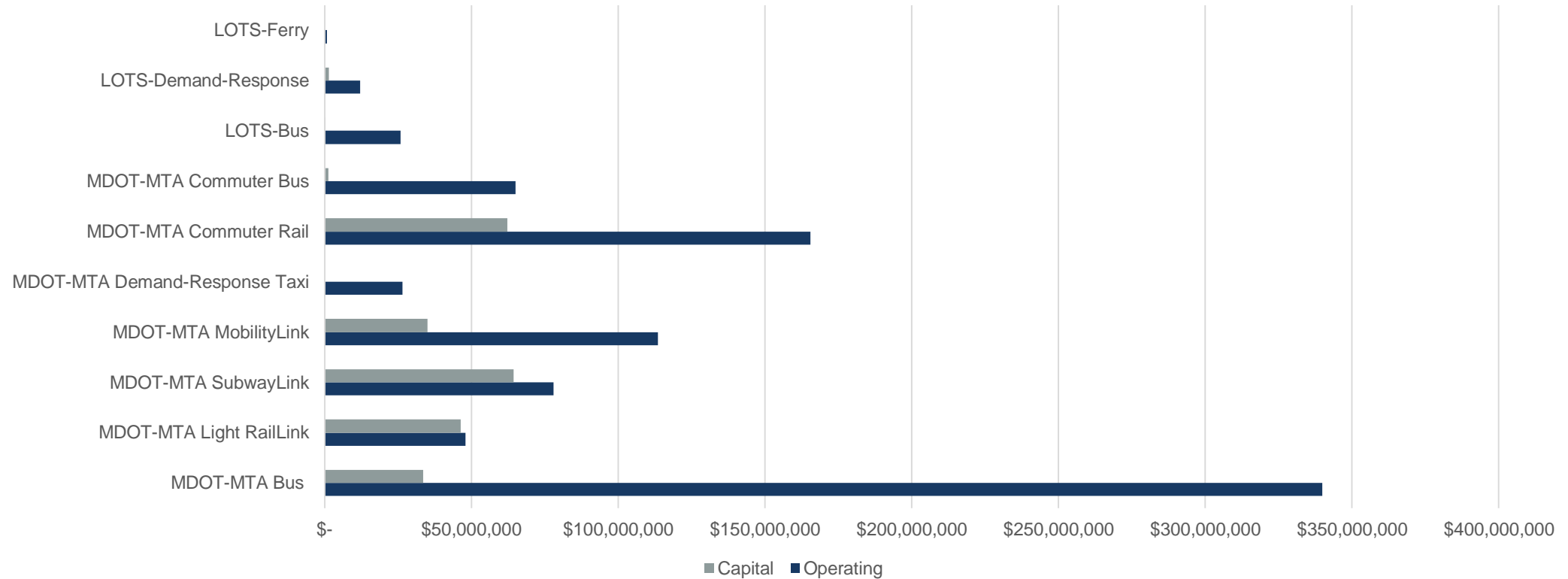


MDOT and MTA Budgets – FY2019



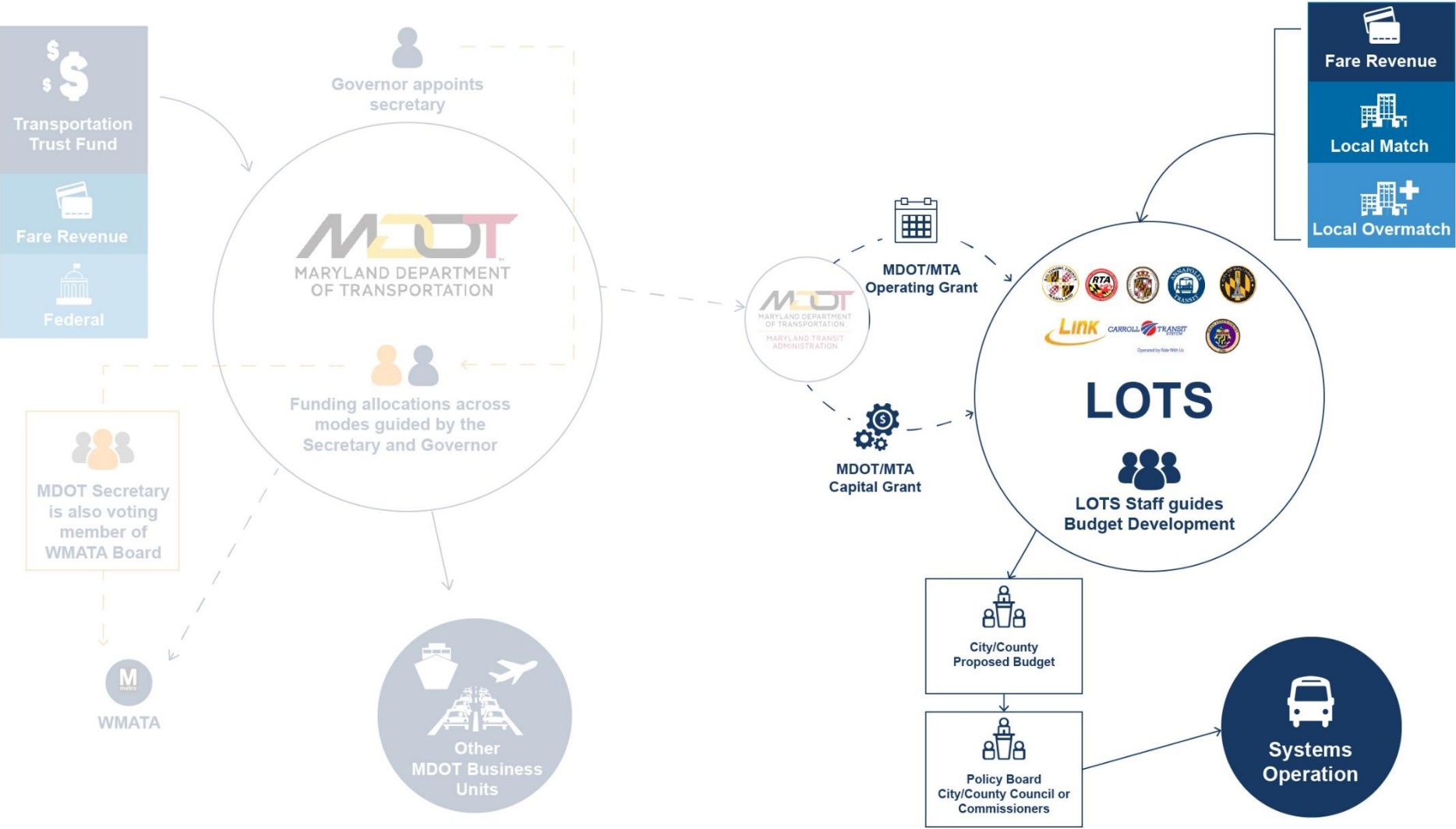
Source: National Transit Database 2019

MDOT and MTA Budgets – FY 2019



Source: National Transit Database 2019

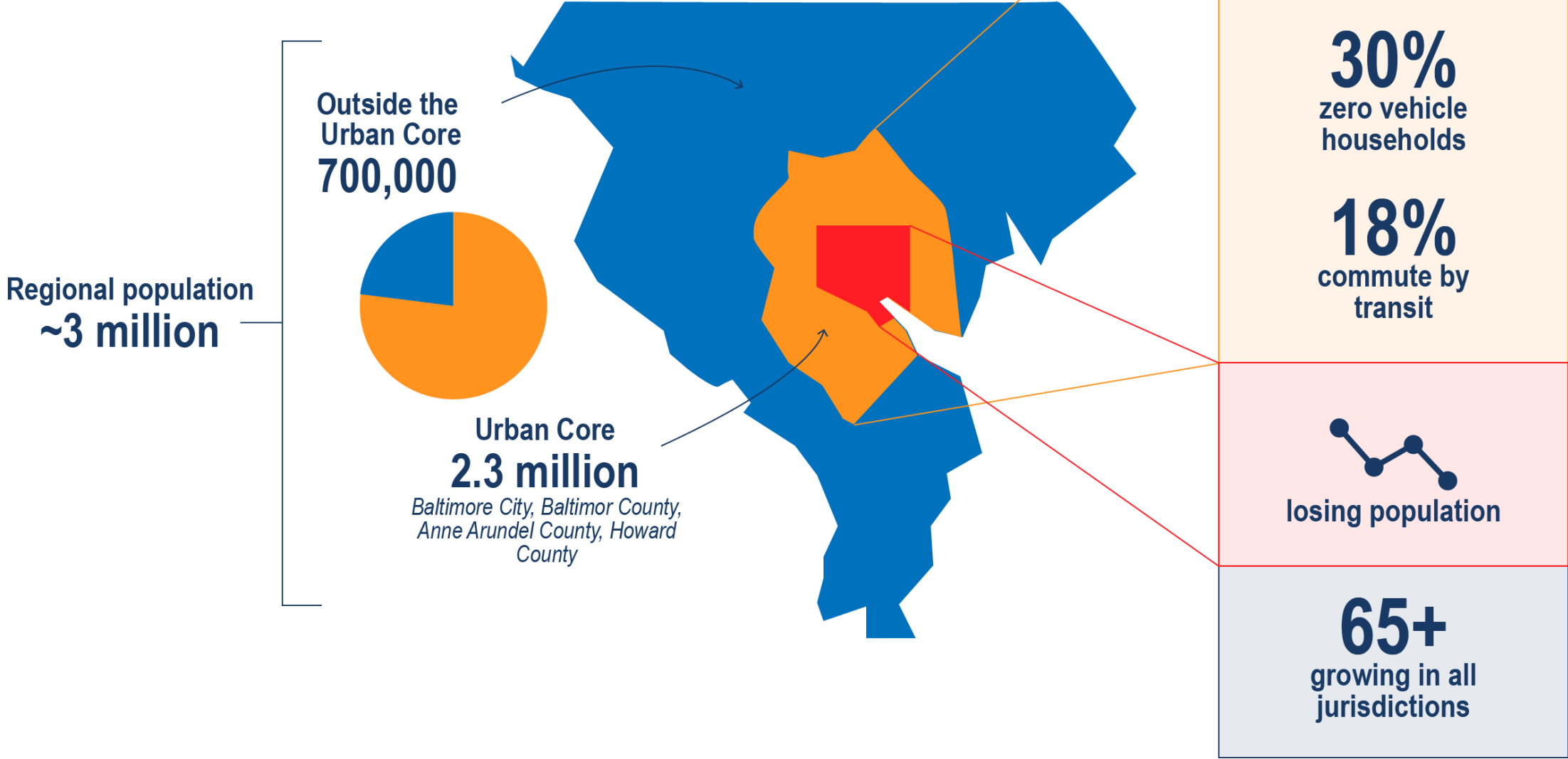
LOTS Budget Process



2

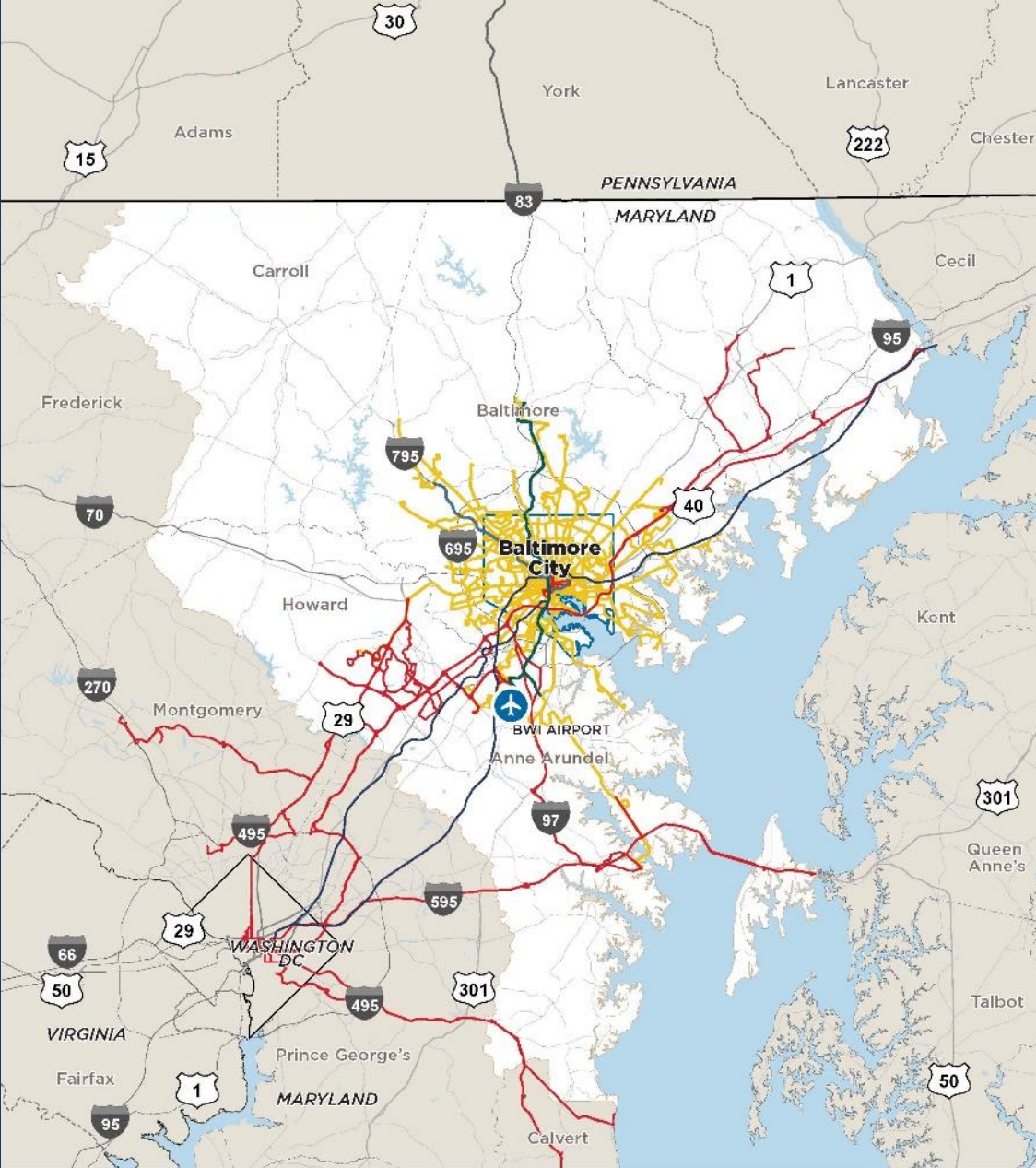
Existing Services

Demographic Context



MDOT-MTA Services

- Directly-Operated or Contracted
- Core area services:
 - BaltimoreLink Bus
 - Light RailLink
 - SubwayLink
 - MobilityLink
 - Taxi
- Core service:
 - FY 2019 Operating Cost \$605,569,142
 - 1,216 Vehicles Operated
- Regional services:
 - MARC Commuter Rail
 - Commuter Bus
- Regional Service:
 - FY 2109 Operating Cost \$230,457,411
 - 429 Vehicles Operated



MDOT and MDOT MTA Services

LEGEND

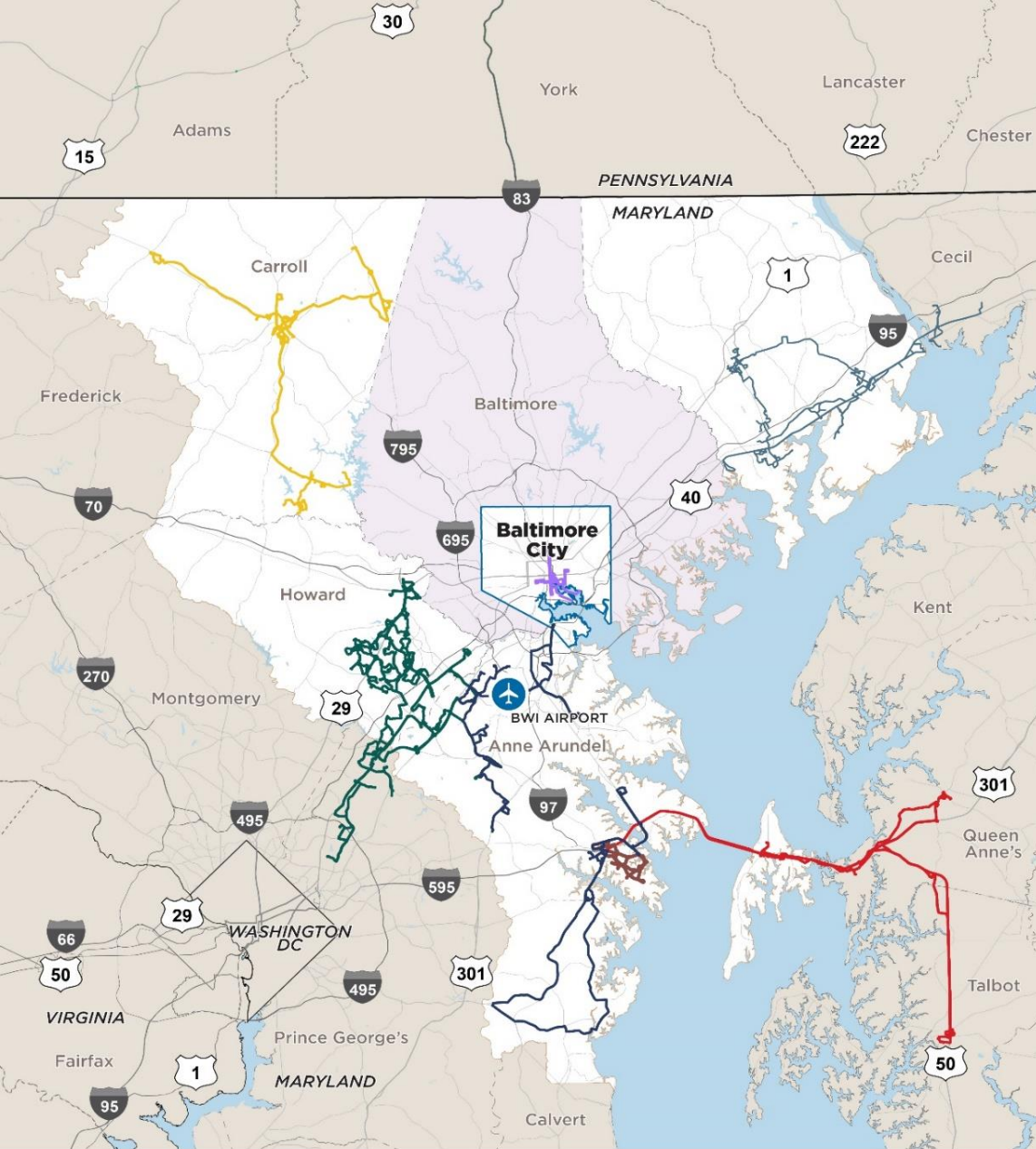
- MARC Train Line
- MTA Light Rail
- MTA Local Bus
- MTA Commuter Bus
- MTA Subway
- Study Area
- State Line
- County Line

Miles 0 5 10 20

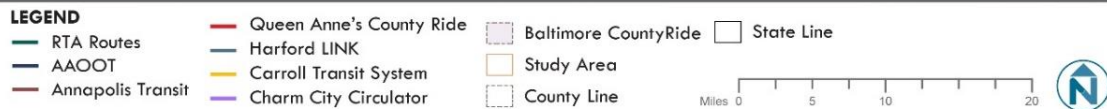


LOTS Services

- Eight separate City/County Systems
- Services operated or contracted by local governments
- City/County
- Service types/levels vary considerably
 - Fixed-route bus
 - Demand-response
 - Specialized Service
- 231 Vehicles in Peak Service



Locally Operated Transit Systems (LOTS)

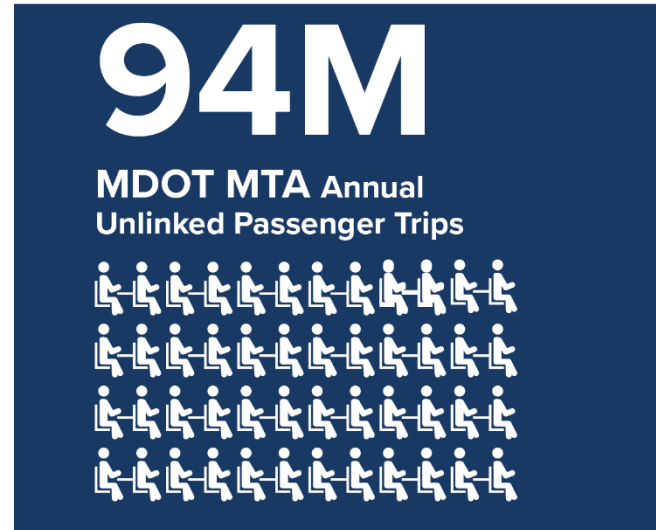
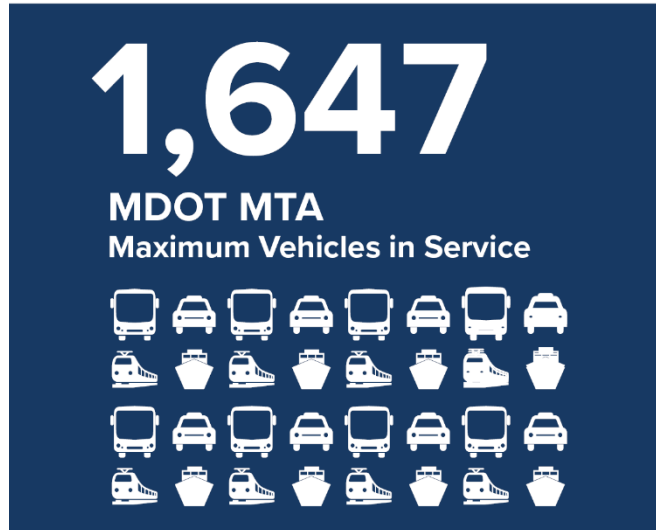


System Scale Differences

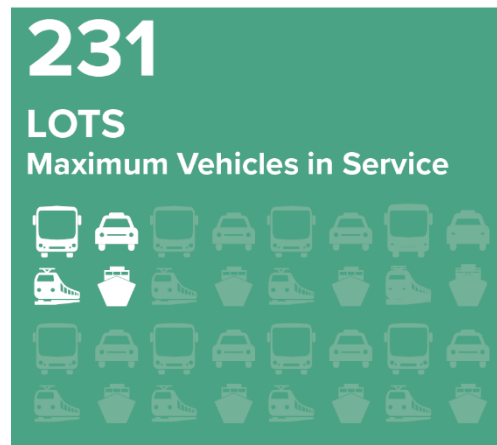
FLEET

TRIPS

MDOT MTA

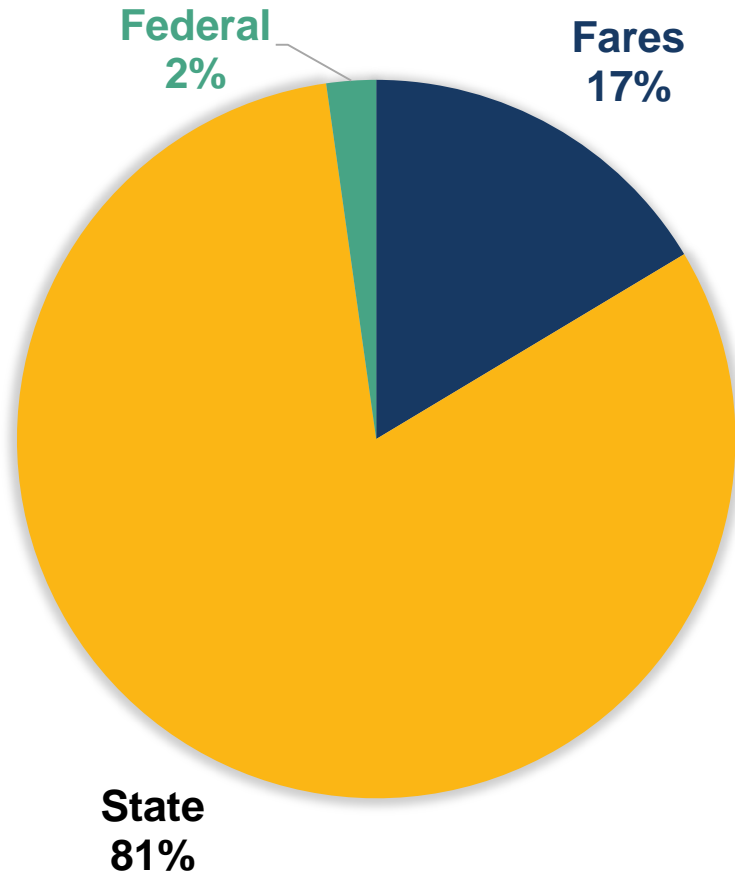


LOTS

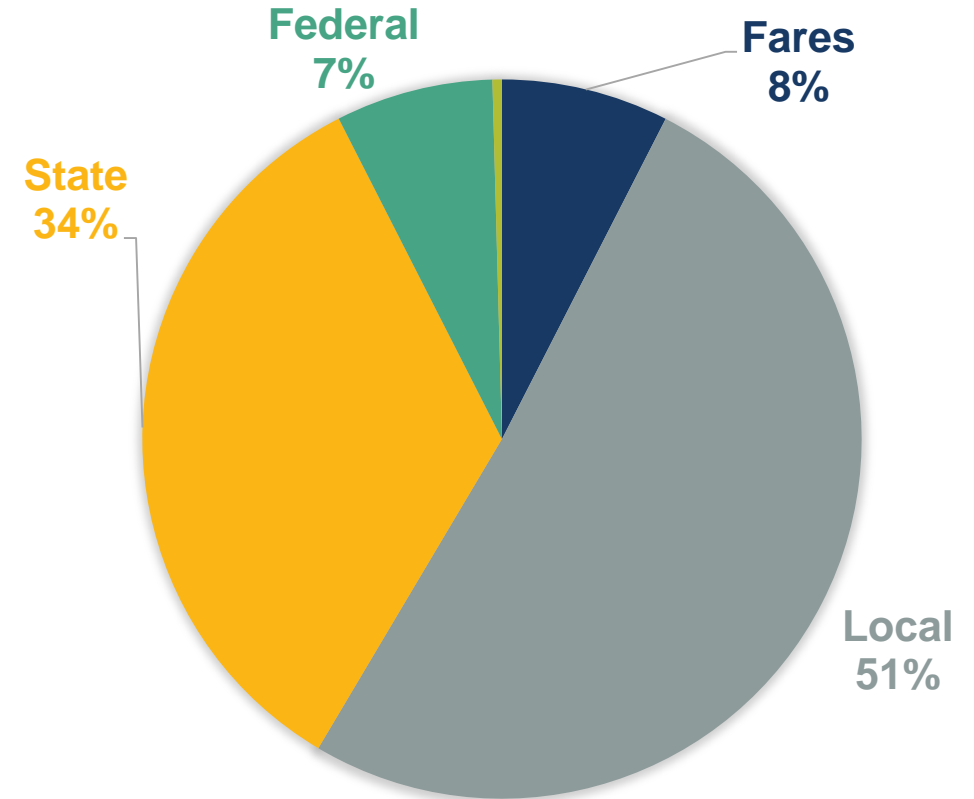


Operating Funding By Source

MDOT MTA



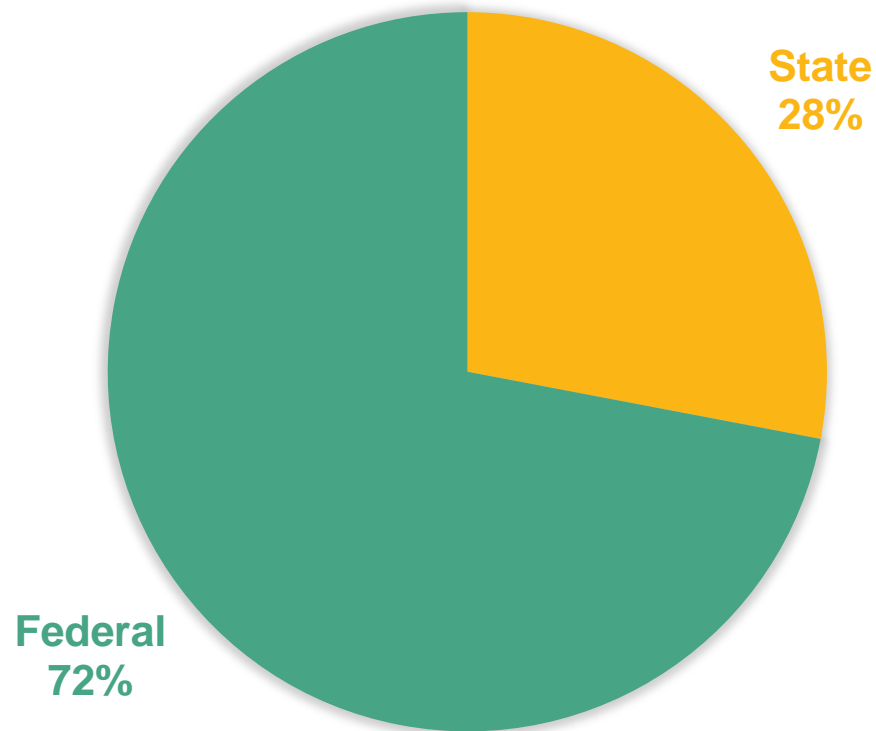
LOTS



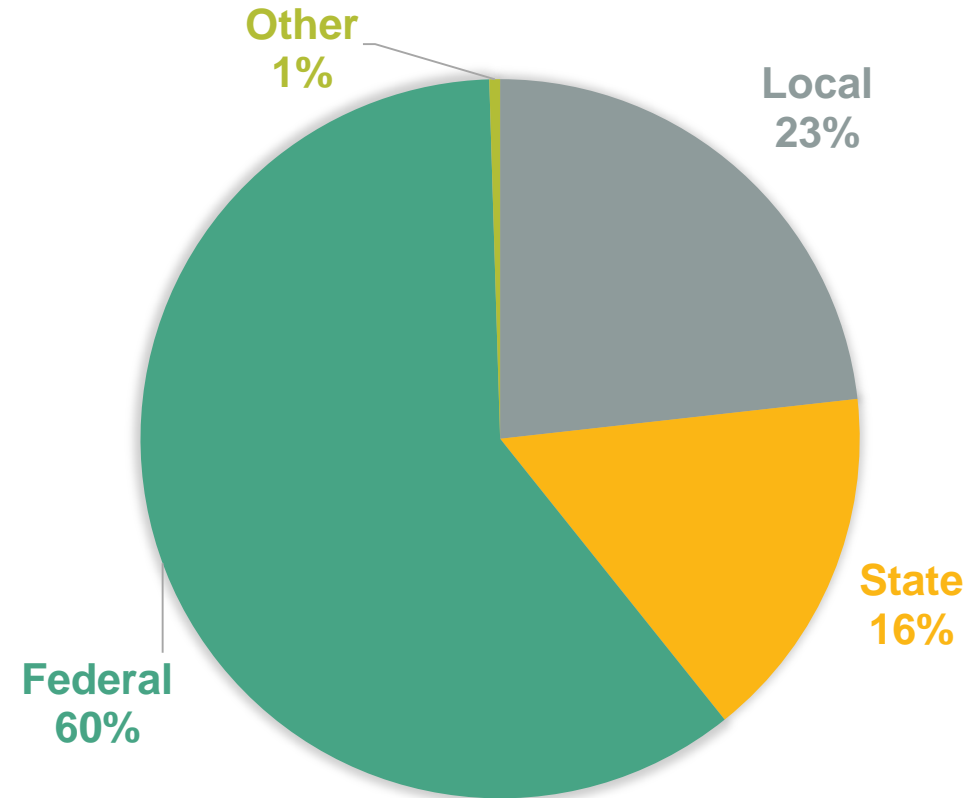
Source: National Transit Database 2019

Capital Funding By Source

MDOT MTA



LOTS



Source: National Transit Database 2019

3

Implications for Developing Alternatives

HOW DOES THE CURRENT STRUCTURE MEET THESE GOALS?



Improve Coordination



Improve Service



Increase Investment



Regional Connections



Enhance Decision Making



Ensure Equitable Investment

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- LOTS local planning represent local vision and needs
- MDOT-MTA supports these local planning efforts
- BRTB and BMC provide regional planning/coordination
- Central Maryland Regional Transit Plan (CMRTP)

Implications for alternatives

- How does MTA coordinate with local planning efforts?
- How well are regional transit planning needs addressed?

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- BaltimoreLink improvements in service and reliability
- LOTS programs have visions for expanded/improved service, for example
 - Anne Arundel and Baltimore Counties—expanded coverage, new routes
 - Harford and Howard—route restructuring, expanded frequency and span
- Funding is a constraining factor for improving service

Implications for alternatives

- Has transit service improved in the Baltimore region?
- How much service is provided in Baltimore region?
- Understand mode share in the region

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- Transit funding constrained by revenue available to the Transportation Trust Fund—flat, COVID declines
- MDOT-MTA capital requirements identified in Transit Asset Management (TAM) plan and 10-Year Capital Needs Inventory
- MDOT-MTA operating needs complicated by existing contracts, labor agreements
- LOTS capital needs identified by MDOT-MTA TAM, local Transit Development Plans (TDPs), Office of Local Transit Support (OLTS) capital prioritization
- LOTS use of local funds

Implications for alternatives

- How well are transit capital needs addressed?

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- MDOT-MTA Regional Services Link the Baltimore region, other parts of the state
- But regional connectivity hampered by
 - individual fare payment systems, structures and levels;
 - unconnected transit information
 - Lack of shared stops
 - Limited LOTS span and frequency
- BRTB plan for shared/improved stops a positive step
- CMRTP call for integrated fares a positive step

Implications for alternatives

- How easy is it to travel throughout the region?
- How well do services connect?

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- State executive has key decisions
- No state-level advisory or policy board other than the General Assembly
- MDOT-MTA decision making is staff driven within MDOT budget/program constraints
- Local decision-making by the LOTS through City/County Budget processes

Implications for alternatives

- How transparent are transit planning and funding decisions?
- Do locals have input into MDOT and MTA decisions?

GOALS FOR GOVERNANCE & FUNDING



Improve Coordination



Improve Service



Increase Investment



Regional Connection



Enhance Decision Making



Ensure Equitable Investment

How it works today

- LOTS data shows difference in investment levels across the region
- Major differences in transit needs/need demand
 - Urban core
 - Inner suburbs
 - Outlying areas
- MDOT-MTA services needed to be included in assessment of transit equity

Implications for alternatives

- How is state and local funding distributed?
- Has funding increased over time?

4

Peer Selection

Previous Peer Review

Central Maryland Regional Transit Plan

SERVICE BY MODE

	Bus	Light rail	Heavy Rail	Commuter Bus	Commuter Rail	BRT
MDOT MTA & LOTS	✓	✓	✓	✓	✓	
Cleveland	✓	✓	✓			✓
Salt Lake City	✓	✓		✓	✓	
Houston	✓	✓		✓		
Denver	✓	✓			✓	
Minneapolis	✓	✓			✓	
Portland	✓	✓			✓	
Pittsburgh	✓	✓				
St. Louis	✓	✓				
Washington, DC	✓		✓			

Eno Report: Transit Reform for Maryland

Eno Report: Transit Reform for Maryland

- Metro Transit (Minneapolis - St. Paul region)
- Massachusetts Bay Transportation Authority (Boston region)
- Port Authority of Allegheny County (Pittsburgh region)

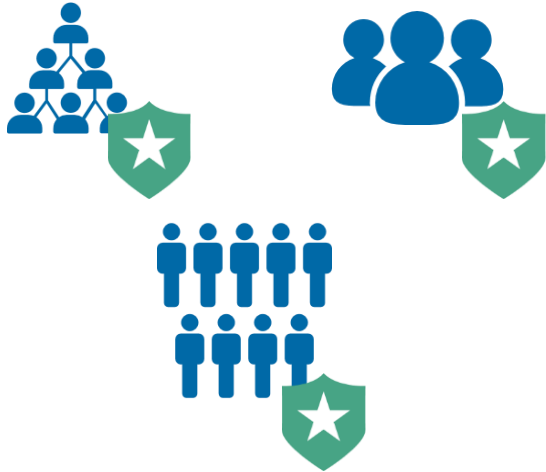
Strong state involvement, but no single point of control

Peer Review Approach

Why do a Peer Review? Helps to understand relative performance and think about what's possible. Two-step approach:

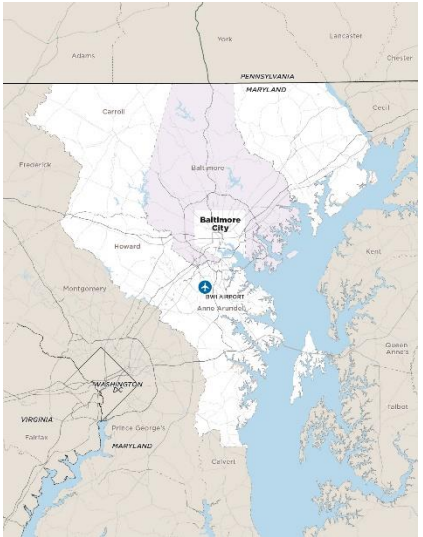
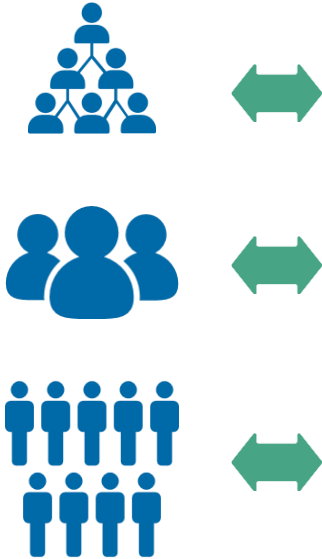
1

First identify systems that stand out for each of study goal



2

Then, refine to ensure relative likeness to the Baltimore region (population, system size, etc.)









1

Peers by Goal

Goal	Potential Peers Systems and Regions
 Improve Coordination	Raleigh/Research Triangle, Washington, DC Area, Toronto
 Improve Service	Minneapolis, Charlotte, Salt Lake City
 Increase Investment	Austin, Salt Lake City, Charlotte, Denver, Seattle
 Regional Connections	Philadelphia, Charlotte, Seattle, Denver
 Enhance Decision Making	St. Louis, Philadelphia, Charlotte
 Ensure Equitable Investment	Puget Sound Region, New Orleans, Vancouver

1

Recommended Peers

Goal	Potential Peers Systems and Regions
 Improve Coordination	Raleigh/Research Triangle, Washington, DC Area , Toronto
 Improve Service	Minneapolis, Charlotte, Salt Lake City
 Increase Investment	Austin, Salt Lake City, Charlotte , Denver, Seattle
 Regional Connections	Southeast Michigan , Charlotte, Seattle, Denver
 Enhance Decision Making	St. Louis, Philadelphia , Charlotte, Southeast Michigan
 Ensure Equitable Investment	Seattle, St. Louis , Southeast Michigan

2 Comparable to Baltimore Region

Peer	State Role	Multiple Modes	Area Population	Percent Minority	Per Capital Income
Baltimore (MDOT MTA)	Yes	Yes	2.8m	45%	\$43,139
Charlotte (CATS)	Yes	Yes	2.6 m	40%	\$36,374
Philadelphia (SEPTA)	Yes	Yes	6.1 m	39%	\$40,930
Southeast Michigan (SMART)	Yes	No	4.3 m	36%	\$35,315
St. Louis (Metro Transit)	Yes	Yes	2.8 m	27%	\$37,365
Salt Lake City (UTA)	Yes	Yes	1.2m	29%	\$34,445
Washington Region (WMATA)	Yes	Yes	6.2 m	55%	\$51,437

2 Comparable to Baltimore Region

Peer	Governance Structure	Funding Sources
Baltimore (MDOT MTA)	Agency Management	Fares, State, Federal
Charlotte (CATS)	Metropolitan Transit Commission (Enterprise Fund within City of Charlotte) Shared Regional Representation	+ Maintenance of Effort and Sales Tax
Philadelphia (SEPTA)	Board of Directors Shared State and Regional Representation	+ Local/Regional Contributions
Southeast Michigan (SMART)	Board of Directors Shared Regional Representation	+ Regional (Property Tax Millage)
St. Louis (Metro Transit)	Interstate Compact Shared State and Regional Representation	+ Sales Tax and Local Funds
Salt Lake City (UTA)	Board of Trustees Shared Regional Representation	+ Sales Tax and Local Funds
Washington Region (WMATA)	Compacts Shared State and Regional Representation	+ Parking and Local Funds

5

Next Steps

Next Steps

1

Technical Memo 2: Existing Structures

*Comments due by Friday,
February 26*

- Draft will be posted on
- website week of March 1

2

Recommended Peers

*Email or call with changes
or ideas by Friday, February
26*

3

DRAFT Technical Memo 3: Financial Review

Available in mid-March

4

Stakeholder interviews

Ongoing

Thank You!

N NELSON
NYGAARD

KFH
GROUP

KPMG

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