The RIDE Policies

Massachusetts Bay Transportation Authority

The RIDE Service Planning and Run Cut Development Policy

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Date	Version	Name	Title	Company	Initials
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Overview

Service Planning refers to the development and maintenance of schedule structures that balance cost and efficiency with customer service. The RIDE's service planning process, by nature, includes the MBTA, The RIDE Access Center (TRAC), and Dedicated Service Providers (DSPs).

The overall service planning effort is overseen and largely coordinated by the MBTA. The MBTA will be responsible for the development and maintenance of multiple ridership forecasts, leading the process to develop a run cut, and coordinating most service planning activities amongst the RIDE's contractors.

Responsibilities

Each stakeholder in the service planning process bears their own set of responsibilities, as follows:

MBTA Office for Transportation Access (OTA)

The MBTA is responsible for:

- leading the service planning process and coordination amongst MBTA, TRAC, and DSPs
- creating and maintaining the mid- and long-term ridership forecasts
- converting the mid-term forecast into service hour requirements for the purposes of establishing the run cut (schedule of driver hours)
- deciding on the mix of service provision between DSPs and NDSPs
- setting Key Performance Indicator (KPI) targets for the run cut
- leading the development of the run cut and the negotiation process to reach final agreement with TRAC and DSPs on the structure of the run cut, with final approval resting with the MBTA

The RIDE Access Center (TRAC)

TRAC is responsible for:

- ensuring the current run cut is entered and maintained accurately in The RIDE's Transportation Management System (TMS)
- developing and maintaining the short-term ridership forecast based on recent ridership trends and trip booking volume and patterns

- using the short-term forecast to determine the need for changes to the required service hours as outlined in the run cut (pre-day-of-service adjustments)
- communicating with DSPs to make pre-day-of-service adjustments to the run cut, including requests for increases or decreases in service hours provided
- ensuring that all vehicle data is entered and maintained within the TMS such that proper assignment of vehicle types meet customer requirements, that passenger volume does not exceed vehicle capacity constraints, and that all runs have a vehicle assigned
- monitoring effectiveness of the run cut against established KPIs and raising up to the MBTA shortfalls identified or recommended changes

Dedicated Service Providers (DSPs)

DSPs are responsible for:

- providing a well-trained vehicle operator workforce that fills the MBTA's run cut
- maintaining Collective Bargaining Agreements (CBAs) for the vehicle operator workforce that meet contractual obligations around the provision of service hours
- reviewing and providing feedback on the run structure, shift requirements, and run cut
- coordinating with TRAC to make pre-day-of-service adjustments to the run cut

Non-Dedicated Service Providers (NDSPs)

NDSPs are responsible for:

- maintaining capacity to fulfill the volume of trips shifted to each provider
- providing notification in a timely manner for trips unable to be served

Transportation Management System (TMS)

The TMS vendor is responsible for:

- maintaining a record of the run cut for vehicle and driver assignment
- recording actual service hours provided by run
- assigning trips dynamically to NDSPs while prioritizing DSP productivity

Service Planning Process

Overview

The MBTA will lead the service planning process and maintain responsibility for delivering a timely run cut according to the schedule and process laid out in this document.

The MBTA leads development and optimization of a run structure (pattern of driver routes) according to the Run Cut Development Schedule for Dedicated Service Providers (DSPs) to cover all hours and days of The RIDE operation and sufficient to meet customer travel demand patterns, noting periods of demand that may require consideration for alternative solutions such as non-standard driver routes or preplanned use of non-dedicated service providers (NDSPs).

The service planning process can be separated into four distinct parts:

1) regular service planning interactions: monitoring daily service, trip bookings, and ridership volumes and requesting service hour adjustments from provider
2) forecasting: developing and maintaining ridership forecasts for different time periods
3) run structure and run cut development: creating service hour requirements and a run structure and converting into a run cut
4) monitoring the performance of the run cut against service planning goals

Service Planning Goals

The goals of The RIDE's service planning process are to find the best combination of DSP service hours and NDSP trip volume that:

1. Best aligns the supply to the forecasted demand
2. Maximizes system productivity and vehicle utilization
3. Makes efficient use of NDSP provider capacity to normalize the demand curve for service hour provision
4. Distributes service hours across DSPs in accordance with their currently allocated target share of the total work
5. Reflects the MBTA's current fleet mix
6. Does not violate labor agreements or make It Infeasible for DSPs to hire and retain drivers to work the runs

Regular Service Planning Interactions

A substantial part of the service planning process is to review and analyze the performance of the current run cut and trip booking volumes and patterns to determine if there exists the need to make requests to providers to adjust the actual service hours provided. These requests should primarily come in the form of requests for additional service hours; however, requests can also be made to reduce the number of service hours provided.

Additionally, as stipulated by the DSP contracts with the MBTA, TRAC shall have the ability to unilaterally extend a driver's shift as allowed by Collective Bargaining Agreements, provided the driver is not listed on the provider's "do not extend" list.

Monthly:

- MBTA will lead a meeting with TRAC operations managers and the MBTA to discuss the status of all schedule structures (internal and external) relative to forecasted needs. As part of this meeting, the MBTA will report on the:
    - current forecast for ridership and service hours
    - integrity of the run structure in the TMS
    - state of filled route commitments per DSP
    - current distribution of the run structure between DSPs

Weekly:

- TRAC will lead a meeting with DSPs and the MBTA to discuss the ability of presently filled runs to provide service to customers according to the current short-term demand forecast.
- TRAC will report on the current state of filled run commitments per DSP as it presently appears in the TMS. DSP representatives will have opportunity to confirm or provide updates relative to any unfilled runs.
- TRAC will report on the most recent vehicle and driver performance stats relative to completion of service hours, which may include hours lost due to vehicle breakdowns, uncovered driver callouts, drivers requiring a premature end of their shift, etc.
- TRAC will ensure that meeting minutes are collected and distributed to representatives of the MBTA and each DSP.

DAILY:

- On the day before service, TRAC will assess any unscheduled trips and promptly communicate the need for additional, or requests for the reduction of, service hours to DSPs and the MBTA.
- TRAC will ensure that all supporting information regarding the need for modifications to service hours, such as the breakdown of requested service hours additions/reductions by timeslice (hour of the day) is clearly conveyed to DSPs and the MBTA.
- If restricted by labor agreements, a duty may not be closed if it is a part of the regularly scheduled work week for a Vehicle Operator. However, if trip volume is lower than expected, any duties that are vacant due to vacation or other reasons will be closed.
- TRAC may unilaterally extend duties, without DSP approval, according to contractual and CBA terms and requirements.

HOLIDAY BIDS:

- TRAC will provide the necessary details for required service hours at an interval level to the DSPs so that drivers may participate in special bids for shifts on MBTA-recognized holidays. These service hour details will be communicated to the DSPs and the MBTA at least five weeks prior to each holiday. Currently, the list of holidays requiring a special bid includes:
    - New Year's Day
    - Martin Luther King Jr. Day
    - Presidents' Day
    - Memorial Day
    - Independence Day
    - Labor Day
    - Thanksgiving Day
    - Christmas Day

Forecasting Ridership

RIDERSHIP & SERVICE HOUR DEMAND FORECASTING

The MBTA and TRAC will maintain three ridership forecasts:

1) Long-term forecast: 12+ months (MBTA)
2) Mid-term forecast: 1-12 months (MBTA)

3) Short-term forecast: <1 month (TRAC):
TRAC will maintain estimates of weekly demand. This information will be made available to the DSPs to track periods of high and low demand who will consider these estimates in its staff planning and management (e.g., vacation approval and leave coverage) to ensure an adequate workforce to cover scheduled runs.

Run Structure and Run Cut Development

Run Structure vs Run Cut

The run structure is the high-level strategy and design of shifts to meet the service hour forecast. It is the framework that defines how service is to be delivered. It determines the "shape" of the DSP workforce needed before drivers and vehicles can be assigned to specific shifts. The run structure sets the:

- run types: the number/ratio of "straight runs" (continuous 8-10 hour shifts) versus "split runs" (shifts with an unpaid break in the middle) or other shorter-duration shifts
- service mix: the balance between runs (dedicated vehicles) and NDSP service (overflow to ride-share providers)
- shift lengths: the variety of shift durations (e.g., 4-hour peak shifts vs. 10-hour full shifts, etc.) designed to cover peak demand periods

The run cut (run cutting) is the specific process of converting the run structure into actual shifts that can be put out to bid by the providers and assigned to drivers. It considers things like:

- Provider-specific business and work rules, including CBA requirements
- Minimum and maximum shift length
- How to maximize the number of trips served by DSPs while minimizing slack or non-revenue time
- How to effectively use overtime without negatively affecting providers

Run Cut Development Process and Schedule

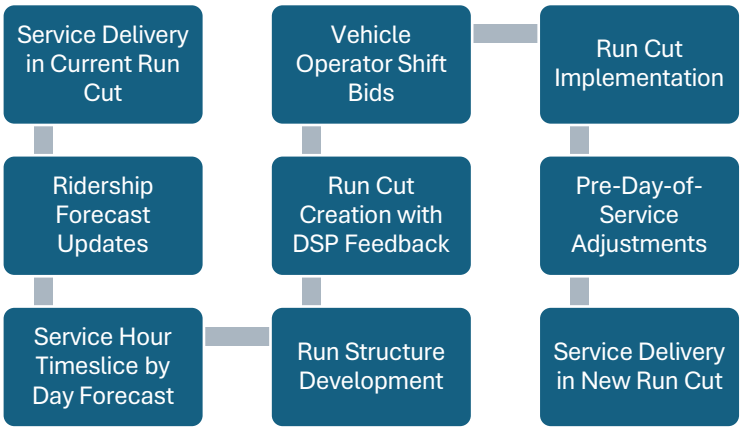
The RIDE will implement a new run cut on the second Sunday of April, August, and December each year. Leading up to the day the new run cut will be implemented into service delivery, the MBTA will undertake the run cut development process to adapt to seasonal fluctuations in demand.

1. **Twelve weeks prior:** Convene the Run Cut Committee, composed of MBTA, TRAC, and DSP management to review and discuss the MBTA's forecast for service hour requirements and

determine if a new run cut is warranted for the upcoming Run Cut Period or if the existing run cut is adequate and can be re-bid by the DSPs. If the Committee determines a new run cut is warranted, then the following will occur:

a. **Ten weeks prior**: MBTA and TRAC review & analyze the existing run cut, forecast updates, and Contractor performance before sharing a proposed run cut with the DSPs.
b. **Nine and eight weeks prior**: DSPs review and provide feedback and TRAC and MBTA iterate on the proposed run cut.
c. **Seven weeks prior:** DSPs provide final feedback on proposed run cut. MBTA finalizes and issues the run cut divided between Service Providers, for Vehicle Operator bids.

2. **Six weeks prior:** DSPs have five weeks to post, conduct, and collate the results of the Vehicle Operator bids. Failure to meet this deadline may result in postponing implementation.
3. **One week prior:** DSPs provide bid results to TRAC to enter and quality check the new run cut in the TMS prior to implementation. Failure to meet this deadline may result in postponing implementation.
4. **Week leading up to the new run cut implementation:** TRAC and DSPs will continually communicate progress with data entry and data quality checks of the upcoming run cut.



Monitoring Run Cut Effectiveness

After a new run cut is implemented, on-going monitoring of the performance of the run cut is critical both to enable appropriate pre-day-of-service adjustments to be made and to ensure the next run cut is modified accordingly.

Target KPIs

- **On-time performance:** the percentage of total trips that arrive (for Drop-off anchored trips) or are picked up (for Pick-up anchored trips) within the on-time window
- **Productivity:** the ratio of trips to revenue hours for a particular time period, usually daily and by time-slice
- **Vehicle Utilization:** the percentage of service hour time that vehicles are in revenue service
- Service Hour allocation: the distribution of service hours across service providers
- **Pull-out adherence:** the percentage of Pull-outs that are on time
- **Actual Hours Provided Variance from Run Cut:** the difference between hours assigned in the run cut process and Revenue Hours provided
- **On-board Travel Time:** the time a Customer is on a trip, from Pick-Up to Drop-off; the standard is for a trip not to exceed fixed route travel time + 20 minutes
- **Vehicle Operator Performance:** Vehicle Operator behaviors that impact service delivery such as blowing off trips, refusing trips, late Pull-outs, leaving the service area, etc.

Definitions

Duty: the TMS nomenclature for a Vehicle Operator's daily assigned shift or route also known as a run or route.

Run: a set of scheduled hours to which an individual Vehicle Operator is assigned also known as a route or duty.

Run cut(ting): process of breaking down the total daily service hours (vehicle blocks) into individual work assignments (shifts/duties/runs/routes) for drivers. It focuses on labor efficiency and compliance.

Run structure: refers to how the actual vehicle routes are organized and how service is distributed throughout the day to meet passenger demand; refers to the high-level strategy and design/mix of shifts