

Network Management Functional Areas and Key Accountabilities

From Current State to Future State



- Unanimous agreement to advance near term and long-term initiatives together
- Action Plan 'down payment' on longer-term objectives
- All the regional roles matter
- Recognition - achieving some outcomes more challenging than others
- Lots of barriers to address
- 'Time is now' – lots of need and momentum for change

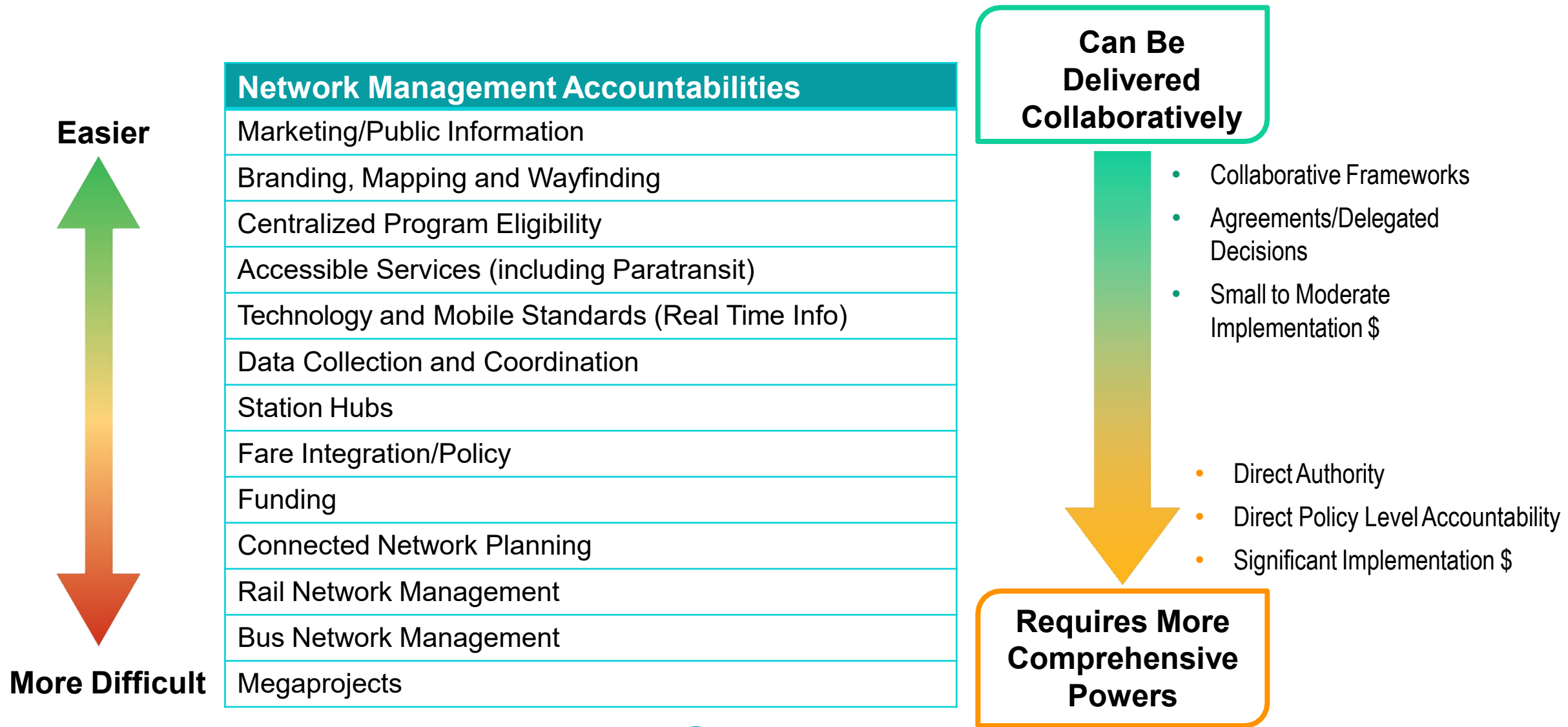
Key Terms

- **Accountable Party/Decision Accountability** – Holding the obligation to ensure the outcome is achieved, and account for its activities and results.
- **Authority/Decision Authority:** Holding the institutional power and tools to enable the accountable party to carry out its assigned duties/obligations.
- **Functional Areas**
 - **System Level** – Highest order network functions for the transit system (Planning, Delivery, Operations)
 - **Transit Element** – A category of functions required to deliver a particular aspect of transit service (e.g. Fares, Wayfinding, Major Projects, Transit Priority etc.)

Why is it important to define accountabilities?

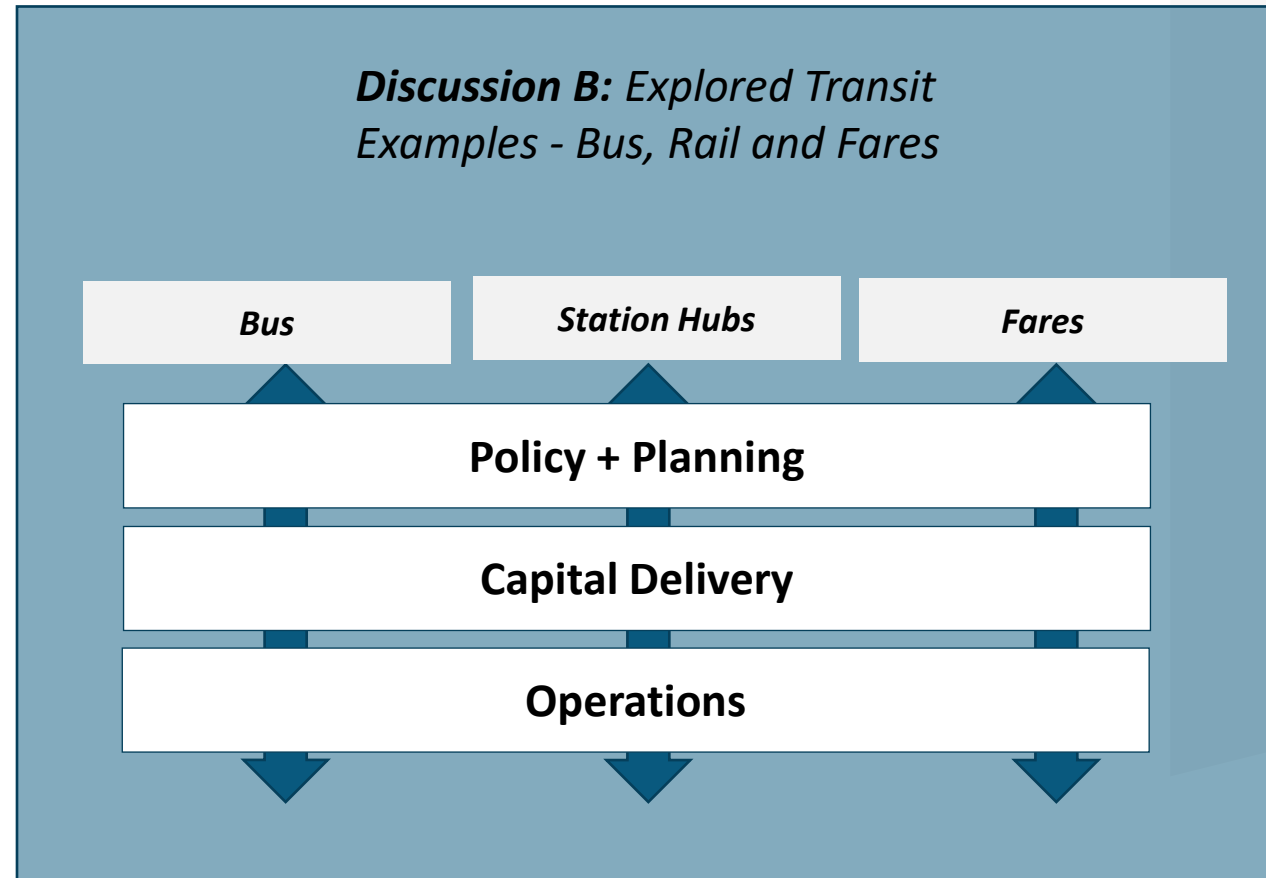
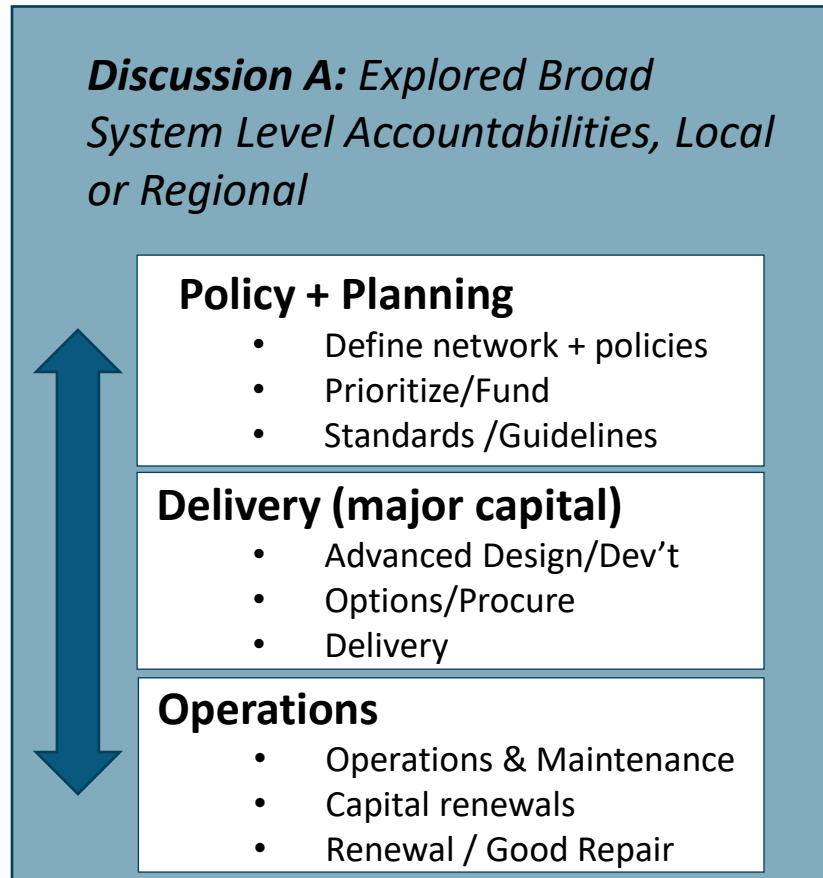
- Outline the types of decisions that are clear regional or local interests vs. shared or unclear responsibilities
- Provide the core set of decision accountabilities for regional network management
- Set out framework for aligning accountabilities with agency responsibility, authority, and capability
- Decision accountabilities define the RNM's 'job description/duties' and will drive alternatives and evaluation framework developments
- Accountability includes decision authority, but does not mean that the accountable party must carry out the action

RECAP: How Far Can RNM Go? Consequences? Tradeoffs?



Defining where accountability is held

- Workshop activities with ad hoc committee



Accountability Explorations, Then and Now

BTRTF, Summer 2021

- Strategic Vision/Plan
- Standards and Guidelines



- Project Prioritization
- Project Funding



- Infra Development & Design
- Infra Delivery



- Local network vision
- Local network service planning
- Operations & maintenance



Current

- Explore accountabilities for key functional areas
- Purpose: to understand where there is consensus on where accountabilities lie, and where accountabilities are shared or unclear
- Following slides show preliminary groupings of accountabilities as per discussions in the ad hoc meetings

Network Vision, Policy, and Prioritization

Clear local/operator accountabilities

- Set local/operator transit vision, strategy, and plan
- Set supporting policies (fare levels)

Shared or unclear accountabilities

- (Unclear) Define local/operator standards to align with regional policy and vision
- (Shared) Nominate regional funds-supported local projects, consistent with regional vision

Clear regional accountabilities

- Set regional transit vision, strategy, and plan
- Undertake system-wide monitoring and reporting for regional and local networks
- Identify, screen, and prioritize major regional investments
- Advance funding strategy and fund regionally identified priorities

Infrastructure development, design, and delivery

Clear local accountabilities

- Set local transit vision, strategy, and plan
- Develop/design/deliver major operating capital (e.g. system renewal, fleet)

Shared or unclear accountabilities

- (Shared/Unclear) Specify the requirements for delivery of major* new-build regional infrastructure

Clear regional accountabilities

- Define network vision/plan for major initiatives
- Define scope and timing of major infrastructure projects to Vision/Plan and regional guidelines
- Undertake conceptual and advanced planning/design for regional projects
- Ensure adherence to requirements for major regional infrastructure delivery
- Procure/deliver major new-build capital initiatives

Network operations

Clear local accountabilities

- Lead medium- and short-term planning for local networks
- Set service standards for local service
- Operate and maintain local/operator services

Shared or unclear accountabilities

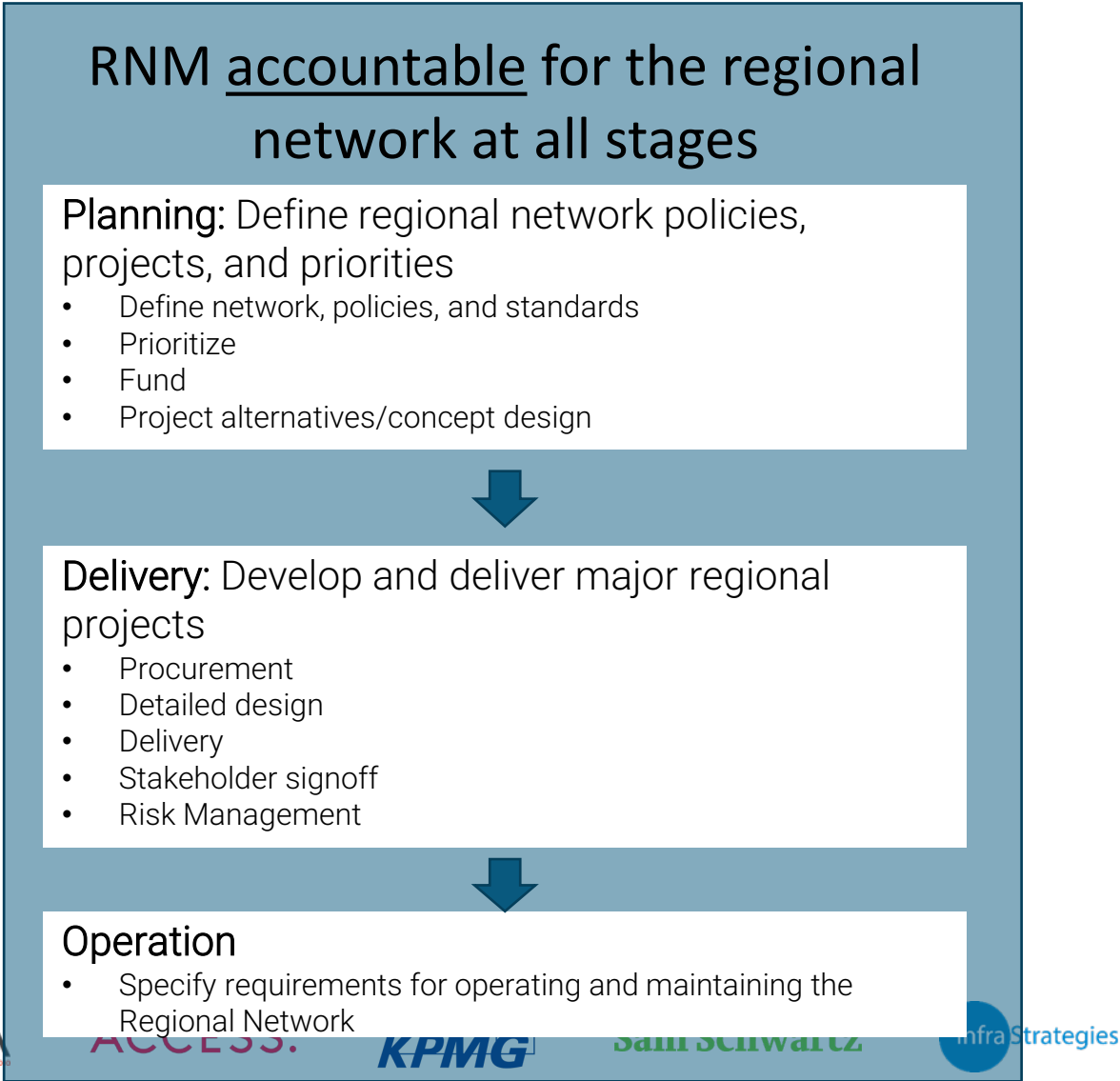
- (unclear) Operate and maintain regional services to defined specifications

Clear regional accountabilities

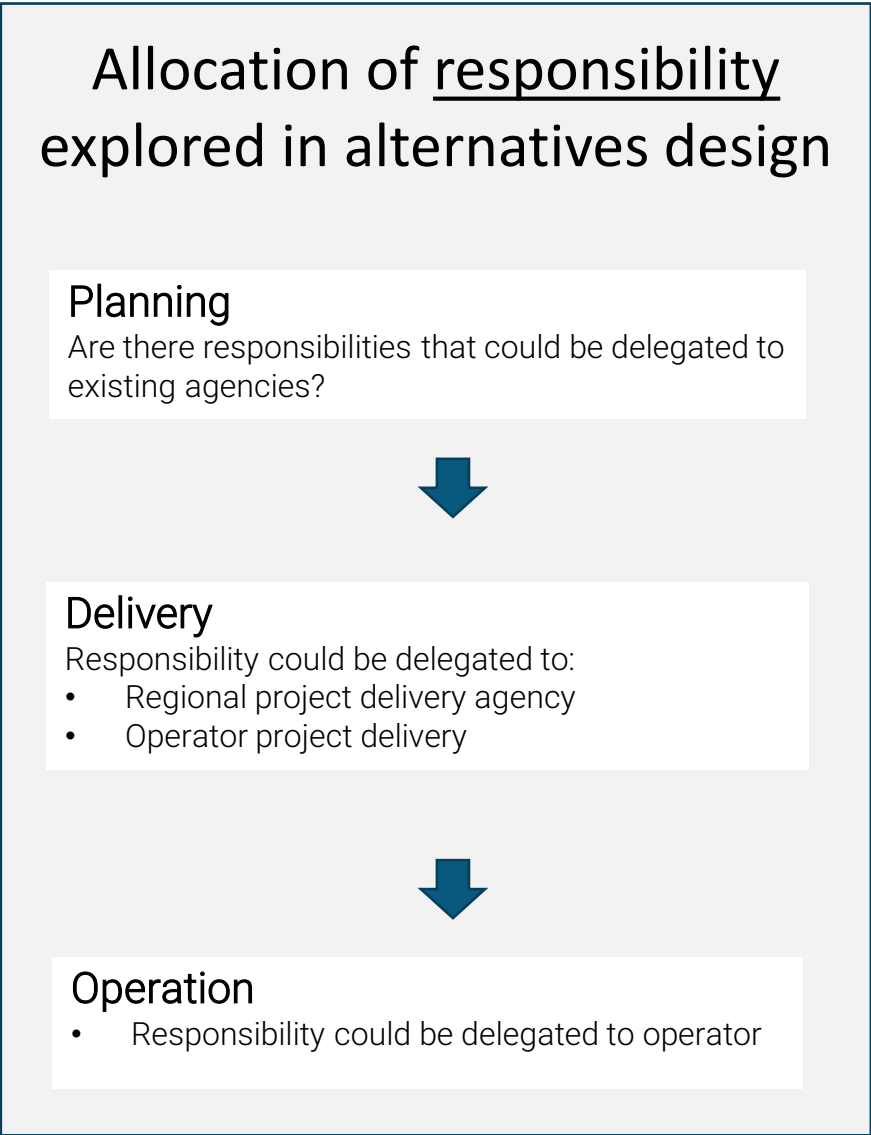
- Lead medium- and short-term planning for regional network
- Set service guidelines, policies for regional service

Emerging consensus and areas to explore

Emerging Consensus



Areas to explore



Key takeaways from ad hoc discussions

Emerging consensus

- RNM should have accountability and decision-making authority for the regional network and policies
- RNM will have an interest in supporting local service that feeds the regional network
- RNM has an important role in supporting project delivery

Key Discussion

- Definition of regional interests, network, policies is key to defining required RNM authorities
- Extent of role of RNM in project delivery (spectrum: resource to delivery agent)

Questions and challenges

- Need to support regional network without compromising local objectives
- What types of projects can/should be delivered regionally?
 - Regional network projects?
 - Other projects (e.g. local BRT, electrification infrastructure)

Entity design principles – how will they be used

- Will guide the development of the RNM
- “Should statements” – design attributes that the entity should reflect
- Reflect the problem statement and the Existing Conditions Assessment:
 - tells us what the entity should strive for
 - reflects how it will address enabling factors and overcome constraining factors

Introducing Entity Design Principles

RNM accountabilities:

1. **All Accountabilities:** able to substantively assume all accountabilities (easy to hard), over a reasonable timeframe
2. **Authority:** sufficient authority to define and execute regional accountabilities, long term goals
3. **Voice:** policy body reflects equity in planning and decision making and an appropriate balance of regional transit interest
4. **Effectiveness:** management body is capable of making evidence-based decisions and initiating action, in timely and effective manner

Funding:

5. **Near term** – capable of reasonably reallocating funds to begin substantive advancement of RNM, while maintaining integrity of local service objectives
6. **Long term:** capable of generating operational efficiencies and substantive new regional funding to support regional and local networks

Transition, Capacity and Resources:

7. **Forward compatible** – entity designed to be capable of ‘getting started’ to materially address current needs, and also evolve to meet ambitious regional agenda
8. **Capacity and resources** – capable of generating shared commitment to providing starting technical capacity and building new long-term regional transit competency

Summary of Ad Hoc Feedback – Design Principles

- All Accountabilities: Some accountabilities may remain with MTC/Operators
- Funding: Reallocation needs to take into account the realities of inflexible local funding
- Region needs to be able to support development of multiple high-complexity projects
 - Current system for developing projects has engendered innovation and parallel project development
- Regional standards/guidance shouldn't restrict innovation by cities or operators

The RNM Entity 'Job Description' Themes

Closing discussion on key points of:

- Agreement
- Disagreement
- Points for further clarification, exploration

Next Steps

Near term - Spring

- Distribute Existing Conditions for Review
- Further Develop the Design Principles
- Complete/sort accountabilities for RNM (the RNM 'job description'):
 - Accountabilities (decision making authorities)
 - Responsibilities (duties)

Later Spring/Summer - Initiate Evaluation and Alternatives Development

- Define 'Regional Network Reference Concept'
- Develop RNM entity models
- Develop evaluation framework and evaluation metrics