



Always Broke

Governing and funding public transportation
in and around Boston 1918 - 2024

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EXECUTIVE SUMMARY:

Since 1918, 26 Massachusetts governors, 25 secretaries of transportation, 30 general managers, and hundreds of other trustees, directors, superintendents, superchiefs, legislators, mayors, select boards, auditors, consultants, commissions, committees, panels (including special panels), task forces, studies, reviews, reports, evaluations, and investigations have suggested and enacted remedies such as system expansion, transit service cuts, fare increases, fare reductions, wage increases, wage reductions, public control, privatization, centralization, decentralization, municipal management, state management, public authority management, layoffs, hiring sprees, austerity, management rights, labor appeasement, deficit spending, forward funding, weekly meetings, monthly meetings, boards of varying sizes, and a variety of other measures during periods of labor unrest, labor harmony, strong economies, recessions, depressions, wartime, peacetime, Democrat administrations, Republican administrations, high and low gasoline prices and many other economic, and social conditions to fund, govern, and oversee public transportation in and around Boston. Nevertheless, as the MBTA begins its fiscal year 2026 budget processes, it faces financial challenges that must, once again, be solved by the leaders of this Commonwealth.

1. It's all about people! Strong leadership from Governors, Secretaries, Board Chairs, and General Managers is the most important factor to success
2. Macroeconomic factors effect public transportation acutely
3. Expansion is economic/housing development and should be funded as such
4. Austerity does not work
5. Reform without revenue is a distraction at best
6. Debt is toxic to public transportation
7. Robust, independent oversight helps, not harms processes
8. Profit-making and public transportation do not mix
9. Subsidizing across a larger base is preferable to a smaller base

PROLOGUE:

In 2009, a rare political window of opportunity opened where it seemed that Massachusetts was poised to fix the MBTA's financial, governance, and oversight challenges for the long term. As part of that political environment, *Born Broke* was written and detailed, for the first time, the toxic effects of Big Dig-related debt on the MBTA's budgets. Unfortunately, 2009's political window of opportunity closed without any real fixes for the MBTA or transportation infrastructure in Massachusetts.

As 2024 gives way to 2025, another rare political window of opportunity may be opening. Governor Maura Healey's appointed Transportation Funding Task Force (TFTF) is scheduled to issue its report at the end of 2024, around the same time as a new legislature takes office, and just ahead of the MBTA's FY26 budget process.¹ For the fiscal year starting July 1, 2025, the MBTA's operating budget deficit is estimated to be well above \$700 million annually, and its infrastructure maintenance deficit is at least \$3 billion annually.² Where will this new \$3.7+ billion per year come from?

This essay reviews Boston's public transportation governance, financial, and oversight structures from 1918 to 2024 to try and understand which ones made public transportation thrive in the past. If a political window of opportunity indeed opens in early 2025, then history offers clear lessons to understand in any legislative solution. What is unclear, however, is if history's lessons can be learned this time.

¹ Brian Kane is a member of Governor Healy's Transportation Task Force representing the MBTA Advisory Board.

² "The path to a safe and reliable transit system just got a lot longer" Massachusetts Taxpayers Foundation, Dec 20, 2023

INTRODUCTION:

Since 1918, many leaders have tried many different ways to fund, govern, and oversee public transportation in the Boston region. In reviewing these approaches, nine historical lessons are apparent offer important lessons to today's leaders as changes to the Massachusetts Bay Transportation Authority (MBTA) are considered in 2025:

1. It's all about people! Strong leadership from Governors, Secretaries, Board Chairs, and General Managers is the most important factor to success
2. Macroeconomic factors effect public transportation acutely
3. Expansion is economic/housing development and should be funded as such
4. Austerity does not work
5. Reform without revenue is a distraction at best
6. Debt is toxic to public transportation
7. Robust, independent oversight helps, not harms processes
8. Profit-making and public transportation do not mix
9. Subsidizing across a larger base is preferable to a smaller base

During those occasions when public transportation in and around Boston thrived, strong executive leadership led well-resourced agencies focused on day-to-day operations. During these times, legislative support for infrastructure maintenance and expansion were robust, regular, and offered by leaders who understood the relationship between public transportation expansion, regional economic development, and the enlargement of areas for dense housing development. In times of strong performance, robust, independent, and knowledgeable oversight entities ensured public trust in the operating agencies via rigorous examination. Such oversight entities held agency leaders, and their political masters, accountable for public spending, and sought needed legislative reforms on behalf of taxpayers and riders alike.

While public transportation has existed in the Boston region for over 400 years, the MBTA in its current form can be traced most closely to two predecessor agencies, the Boston Elevated Railway (BERy) and the Metropolitan Transit Authority (MTA). In 1918, as many people shifted from streetcars to private automobiles, the Massachusetts legislature adopted the Public Control Act to transfer the BERy to quasi-public control. Under public control, the taxpayers of the 14 cities and towns hosting streetcars (Arlington, Belmont, Boston, Brookline, Cambridge, Chelsea, Everett, Malden, Medford, Milton, Newton, Revere, Somerville and Watertown) were made responsible to cover the railway's deficits, including debts and dividends to shareholders.

The MTA Acts of 1947 and 1949 more thoroughly invested public transportation in public and, more specifically, municipal control. In and around Boston, private railroads providing commuter transportation between downtown Boston and its suburbs faced challenges throughout the 1950s and early 1960s, as ridership and fare revenue were lost to private automobiles. As the MTA's deficits increased year over year, the pressure on the 14 cities and towns and their taxpayers grew, leading to calls to expand the base of communities subsidizing public transportation. In addition, as formerly private railroads responsible for carrying multitudes of commuters into and out of the downtown core from ever-growing suburbs failed financially, and calls grew for public subsidization, a political window of opportunity opened.

In 1964, the Legislature approved the MBTA Act, which expanded the number of communities supporting public transportation from the original 14 streetcar

communities to 78 municipalities in and around Boston. From the late 1960s into the 1990s the calls from the 78 communities responsible for MBTA deficits grew louder and louder to shift responsibility from the municipal to the state. This culminated in Forward Funding which dramatically shifted the amount of state support for public transportation. Forward Funding was meant to be the long-term fix for the operating and capital needs of public transportation in and around Boston. Unfortunately, larger macro-economic changes, coupled with certain questionable public-policy decisions, meant that the revenue expected under Forward Funding did not materialize.

In this century, multiple attempts at so-called reform have attempted to impose austerity, mergers, personnel-reductions, service cuts, and fare increases to manage public transportation in the region. Such tactics have not only failed to improve the public transportation in the region, but weakened it considerably. Austerity, perhaps predictably, resulted in less maintenance, overworked staff, reduced training, safety short cuts, and policies that put short-term political considerations ahead of longer-term, customer-facing ones. In 2022, the Federal Transit Administration (FTA) stated:

“The combination of overworked staff and aging assets has resulted in the organization being overwhelmed, chronic fatigue for key positions in the agency, lack of resources for training and supervision, and leadership priorities that emphasize meeting capital project demands above passenger operations, preventive maintenance, and even safety.”

- U.S. DOT FTA, August 31, 2022.

Since taking office, the Healey/Driscoll Administration has appointed new leadership at the MBTA, and it in collaboration with the Legislature, has increased

subsidy levels allowing the Authority to increase hiring to meet the FTA's demands and improve safety.

As 2025 approaches, the MBTA's financial position is dire. Revenue from fares have declined from over \$700 million in FY20 to around \$400 million in FY25.³ This, coupled with the increase hiring mandated by the FTA, and the loss of COVID relief revenue from the federal government, puts more pressure on the Authority's operating budget than ever. For FY26, which starts July 1, 2025, its operating budget deficit is estimated to be at least \$700 million, coupled with an infrastructure deficit of at least \$3 billion annually.⁴ As leaders cope with how to find such remarkably large sums, inevitably changes to how public transportation is governed, financed, overseen, and managed will be contemplated as well. History's lessons are critical to understand as such policy changes are reviewed.

BOSTON ELEVATED RAILWAY PUBLIC CONTROL ERA- 1918-1947:

While public transportation has moved the people and economy of Greater Boston for at least the past 400 years, governmental management of buses, trains, streetcars, subways and other modes began in June 1918 when Governor Samuel McCall signed the Public Control Act. This legislation effectively leased the privately held BERY's assets and allowed the Governor to appoint a Board of Trustees to direct its operations.⁵ The new Trustees paid the BERY's private shareholders a fixed rent in the form of dividends, issued additional shares to support maintenance and infrastructure, and exercised day-to-day control of its streetcars

³ "FY25 Operating Budget Oversight Report (7/1/24 – 6/30/25)" MBTA Advisory Board, May 6, 2024.

⁴ "The path to a safe and reliable transit system just got a lot longer" Massachusetts Taxpayers Foundation, Dec 20, 2023

⁵ "Boston Elevated Railroad Trustees Named by Gov McCall" Boston Evening Globe, Jun 26, 1918, page 1

and subways for the public's benefit.⁶ The Act also made the 14 cities and towns that hosted streetcar service at that time responsible for any deficits incurred under the new arrangements.⁷ A review of annual reports shows deficits incurred in 1919 and 1920, surpluses from 1921 to 1927, deficits again from 1928 to 1942, and finally surpluses from 1943 until its abolishment in 1947.⁸ Throughout the 1920s, 1930s and 1940s, the annual costs to the 14 cities and towns responsible for any deficits grew. The BERY's financial model relied on fare paying customers for the bulk of its revenue. However, by 1947 it was clear that the financial and governance structures underpinning the BERY needed replacement.

McCall Administration- 1918-1919:

Governor McCall appointed former Lieutenant Governor Louis Frothingham the first Board Chair of a publicly controlled BERY in June 1918.⁹ Four months later, in October 1918, Frothingham resigned, and McCall appointed William M. Butler as the second public Board Chair.¹⁰ Two months later, however, in December 1918, Butler resigned, and McCall replaced him with James F. Jackson as the third Board Chair of the publicly controlled BERY in 1918, and in its history.¹¹ Jackson served until 1925. The previous month, in November 1918, Charles D. Emmons became General Manager (GM) of the new publicly operated system. Emmons previously served as GM of the Boston & Worcester railway, and the Chicago, South Bend, and Northern Indiana railway.¹² Fares increased three times between August 1918 and

⁶ Jackson, James F. "Boston-The Public Trustee Plan" National Municipal Review, Vol. X, No. 2; Feb. 1921, p 111

⁷ These 14 communities still form the inner core of the MBTA Service Area, see MGL Ch161a Sec1.

⁸ See State Library of Massachusetts: <https://hdl.handle.net/2452/800645>

⁹ "Boston Elevated Railroad Trustees Named by GOV McCall" Boston Globe, Jun 26, 1918, p. 1

¹⁰ "William M. Butler New Trustee of Elevated" Boston Globe, Oct 30, 1918, p. 2

¹¹ "James F. Jackson Elevated Trustee" Boston Globe, Dec 31, 1918, p1

¹² J.H. Neal Elected Head of Elevated" Boston Globe, Nov 21, 1918, p. 5

July 1919, up to a high of \$0.10 per trip by July 1919.¹³ That month, thousands of riders began boycotting the BERY to express displeasure with the 10 cent fare.¹⁴ Thousands of unionized BERY employees also went on strike from July 17 to 21, 1919 demanding an 8-hour day and wages of at least 73 cents per hour.¹⁵ The strike ended when Trustees and the Union agreed to binding arbitration. GM Charles Emmons resigned following the strike,¹⁶ and was replaced by Edward Dana, who served as GM of the BERY and its successor the MTA for the next 40 years.¹⁷ The 10 cent fare remained until 1947, but with numerous reductions and discounts available. The BERY reported providing 324,758,685 trips in 1919 via 3,046 revenue vehicles of which 2,622 were streetcars and 424 subway cars.¹⁸

Coolidge, Cox and Fuller Administrations- 1919-1929:

Governor McCall did not seek reelection in the election of 1918 for another 1-year term. Lieutenant Governor and future President Calvin Coolidge won the 1918 election, taking office in January 1919. The Massachusetts constitution was amended in 1918, extending the Governor's term of office from 1 year to 2 years effective January 1919. Coolidge's term ended in January 1921, and he was replaced by Lieutenant Governor Channing Cox, who served two 2-year terms until January 1925. Neither Coolidge nor Cox made any substantive changes to the management of the BERY.

Alvin T. Fuller won the election of 1924, taking office in January 1925. BERY Trustee chair James Jackson resigned in August 1925 and was replaced by Sameul L.

¹³ "Annual Report of the Public Trustees of the Boston Elevated Railway For the year ending Dec 31, 1919"

¹⁴ "'L' faces strike threat by 7000 men" Boston Globe, Jul 13, 1919, p.1.

¹⁵ "Will not attempt to operate cars" Boston Globe, Jul 17, 1919, p.1

¹⁶ "Emmons Hasn't Yet Resigned From 'L'", Boston Globe, Jul 25, 1919.

¹⁷ "Dana Acting Head of Boston Elevated" "Boston Globe" Aug 9, 1919 p. 5

¹⁸ Second Report of the Trustees of the Boston Elevated Railway Company for the year ending Dec. 31. 1919.

Powers, who served as Chair until December 1928.¹⁹ Fuller was reelected in 1926, and in late 1928 replaced Powers with Boston Chamber of Commerce President Henry I. Harriman as Board Chair, a position Harriamn would hold until November 1937.^{20,21} Throughout the 1920s the BERY expanded: in 1921, Arlington Station on what would become the Green Line opened; in 1924, the East Boston tunnel was converted from streetcars to modern subway vehicles; in 1927, what would become the Red Line was further extended from Andrew Square to Fields Corner, and later in 1928 to Ashmont; in 1929, the Mattapan High Speed Line opened from Ashmont to Mattapan.²² In 1923, the BERY also acquired 234 streetcars and 40 new subway cars to replace ageing vehicles. In 1929, 354,214,990 passengers traveled by BERY, on 2,308 revenue vehicles consisting of 1,461 streetcars, 528 subway cars and 319 motor buses (buses were introduced in 1922).²³ The BERY provided 29.5 million more trips in 1929 than it did in 1919 using about half of the revenue vehicles it used in 1919.

Allen, Ely, Curly, and Hurley Administrations- 1929-1939:

Lieutenant Governor Frank G. Allen replaced Fuller as Governor in January 1929, serving one 2-year term. Joseph B. Ely defeated Allen in the election of 1931, serving two 2-year terms until early 1934. In 1931, following years of debate, Governor Ely signed legislation extending public control of the BERY for 28 additional years. This legislation represented a compromise wherein the shareholders continued to receive dividend payments, while operations continued

¹⁹ "New Elevated RY. Trustee" Boston Globe, Aug. 26, 1925, p. 1

²⁰ "Harriman Heads Trustees of 'I'" Boston Globe, Dec. 29, 1928.

²¹ "Hurley Plan on EL Deficit" Boston Globe, Nov. 5, 1937, p. 13

²² Changes to Transit Service in the MBTA district 1964-2024" by: Jonathan Belcher: <http://roster.transithistory.org/MBTARouteHistory.pdf>

²³ Annual Report of the Public Trustees of the Boston Elevated Railway for the Year Ending Dec. 31, 1929

to be managed by public trustees appointed by the Governor.²⁴ Ely did not seek reelection in the 1934 race, which was won by Boston Mayor James Michael Curley, who served one 2-year term until January 1937. Neither Allen, Fuller, nor Curley made any substantive changes to the management of the BERY.

Charles Francis Hurley succeeded Curley as Governor, taking office in January 1937. In November 1937 Hurley appointed Edward E. Whiting to chair the BERY, a position he held until its abolition in 1947. During the 1930s the BERY expanded across much of its network. In 1932, the subway portion of what would become the Green Line was extended from Kenmore Square to new portals on Commonwealth Avenue and Saint Mary's Street. In 1938, the Atlantic Avenue Elevated was abandoned.²⁵ By the end of 1939 the BERY provided 295,123,077 revenue trips via 2,184 revenue vehicles consisting of 1,088 streetcars, 483 subway cars, 516 motor buses and 97 trackless trolleys (trackless trolleys were introduced in 1936).²⁶ In 1939, the BERY carried 59.1 million fewer revenue passengers than it did in the final year of the 1920s, and operated 373 fewer revenue vehicles in 1939 compared to 1929.

Saltonstall, Tobin, and early Bradford Administrations- 1940-1947:

Leverett A. Saltonstall won the election of 1938, serving until January 1945. BERY ridership during these years increased markedly, as wartime conditions necessitated more trips to places like munitions and ordinance factories, and the rationing of gasoline and rubber limited private automobile use. Total ridership for

²⁴ "'L' Control Act Is Signed by Ely" Boston Globe, May 20, 1931.

²⁵ Changes to Transit Service in the MBTA district 1964-2024" by: Jonathan Belcher: <http://roster.transithistory.org/MBTARouteHistory.pdf>

²⁶ Twenty-First Annual Report of the Board of Public Trustees of the Boston Elevated Railway Company for the Year Ended Dec. 31, 1939.

1945 was 420,096,165 compared to 306,815,252 in 1941, a 37% increase.²⁷ The BERY also reported its war related own shortages, especially for raw materials such as steel, rubber, lumber and coal. Over 1,000 BERY employees served in the armed forces during the war, leading to staffing shortages and the curtailment of certain transit operations.²⁸ By the end of 1946, the last full year of BERY operations, the agency reported 433,094,952 total revenue trips, via 1,114 streetcars, 482 subway cars, 607 motor buses, and 162 trackless trolleys.²⁹ Boston Mayor Maurice Tobin won the 1944 election, taking office in 1945 and served one 2-year term. He would go on to serve as Secretary of Labor under President Harry Truman from 1949 to 1953.

During its 28 years of operation, the BERY ran deficits 17 times and surpluses 11 times.³⁰ It operated from just after World War I until just after World War II, including during the Great Depression. Its governance model depended on gubernatorial appointees running an ever expanding system with almost constant calls for fare reductions. Expansion was paid for by issuing bonds which were repaid from fares and other operating revenue. Base fares for streetcar and subway trips remained at \$0.10 from 1919 to 1947, but with numerous lines and trips on the system reduced to \$0.05 under political pressure. There was little incentive for the Trustees to raise fares, since it was the 14 cities and towns that hosted streetcars in 1918 that paid off any deficits. Ridership on the system grew throughout the 1920s, declined in the 1930s during the Great Depression, and rose again in the

²⁷ Comparison of 1941 and 1945 annual reports of the Boston Elevated.

²⁸ The Twenty-Seventh Annual Report of the Board of Public Trustees of the Boston Elevated Railway Company Year Ended Dec. 31, 1945.

²⁹ The Twenty-Seventh Annual Report of the Board of Public Trustees of the Boston Elevated Railway Company Year Ended Dec. 31, 1945.

³⁰ See State Library of Massachusetts: <https://hdl.handle.net/2452/800645>

1940s during the war years. During these times, payments to the private shareholders of the BERY continued.

METROPOLITAN TRANSIT AUTHORITY ERA- 1947-1964:

In the 1946 election Lieutenant Governor Robert F. Bradford defeated Governor Tobin, and became the 57th Governor of the Commonwealth in January 1947. Months later, Bradford signed legislation abolishing the BERY and creating the Metropolitan Transit Authority (MTA) as a body politic and political subdivision of the Commonwealth. The remaining stockholders of the BERY were bought out via a debt issuance by the new MTA, which also inherited responsibility for the BERY's debts.³¹ Under the 1947 legislation, the MTA was governed by a five-member board of trustees appointed by the Governor. Similar to the BERY's structure, deficits of the MTA were the responsibility of the 14 cities and towns where streetcars ran in 1918.³² The MTA's first annual report from 1948 noted:

“Public ownership of the railway system did not solve all of the financial problems concerned with the operation of the transportation system in this area. The remaining burden of fixed charges [i.e. debt] is still much too heavy for the railway system to absorb within its present income.”

-First Annual Report of the Board of Public Trustees of the Metropolitan Transit Authority for the Year Ended December 31, 1947. p. 14

Fixed charges, such as debt service, increased under the MTA as it began borrowing to modernize its infrastructure, purchase new vehicles, construct new bus depots, remove abandoned elevated railways, and make other required infrastructure improvements. The MTA issued bonds secured by special taxes levied on the 14

³¹ “The First Annual Report of the Board of Public Trustees of the Metropolitan Transit Authority for the Year Ended Dec. 31, 1947.” Page 8

³² MGL, Chapter 544 of the Acts of 1947, Section 1

cities and towns in which the authority operated.³³ The MTA operated in a deficit every year of its existence, and the costs to cities and towns grew annually. Carroll L. Meins was the first chairman of the new MTA trustees, taking his post in July 1948.³⁴

Dever, Herter, & Furcolo Administrations- 1947-1961:

In the election of 1948 Governor Bradford was defeated by former Attorney General Paul Dever.³⁵ In early January 1949, just ahead of Dever's inauguration, the original five MTA trustees resigned after Dever signaled he would request their resignations.³⁶ After taking office, Governor Dever ordered service cuts to realize savings.^{37,38} In July 1949, Dever signed a new MTA Act into law, transferring ownership of the public transportation right of way in the 14 cities and towns from municipal to Authority ownership; ending most state and local taxation of MTA property; abolishing rental payments by the Authority to municipalities; refinancing debt; and extending debt payments to as much as 75 years (until 2024).³⁹ This legislation also reduced the pay for the highest earning MTA executives and trustees.⁴⁰ Dever appointed Walter J. Waldron, his campaign treasurer, to chair the new MTA Board of Trustees.^{41,42}

³³ "1980 Report of the Trustees of the Boston Metropolitan District" Boston, MA, Jan 1981, P. 18

³⁴ "Control of Elevated Transferred to New Transit Authority" Boston Globe, Jul 3, 1947, p. 1

³⁵ See political advertisement in the Boston Globe, Oct 14, 1948 p. 19 and Oct 30, 1948, page 3 for instance

³⁶ "Meins, Other 4 Trustees of M.T.A. Quit" Boston Globe, Jan 6, 1949.

³⁷ "MTA Eliminates 3rd Bus Line in Economy Drive" Boston Globe, Feb 6, 1949, p. 19

³⁸ "2 More Bus Lines Cut by MTA; Transfers Granted at Devonshire" Boston Globe, Feb 9, 1949, p1/

³⁹ "Senate Approved MTA Bill; Refuses Gas Tax exemption" Boston Globe, Jul 8, 1949 p. 1.

⁴⁰ "Chapter 573 of the Acts and Resolves of the General Court of Massachusetts for the year 1949" (Wright & Potter Printing Co., 1949) Secretary of the Commonwealth

⁴¹ Photograph with caption "Named by Governor – Walter J. Waldron (left) new chairman of the M.T.A. nominated by Governor today, and Edward A. Pevve, also named trustee", Boston Globe, p. 14

⁴² "Dever, Bradford Confer at State House" Boston Globe, Nov 20, 1948, p. 1

Dever won reelection to a second 2-year term in 1950, but lost the 1952 election to Congressman Christian Herter. Herter almost immediately sought legislation to, among other things, replace the MTA Trustees with a three-person Board of Directors, and create an MTA Advisory Board consisting of the Mayor or Select Board Chair of each of the 14 cities and towns paying MTA deficits. This Advisory Board was charged with increased oversight authority, including a requirement that it approve the hiring of the MTA's GM.⁴³ Herter's legislation was approved, and he appointed a new 3-member board of trustees in March 1953, with Frank W. Rourke, vice president of the Boston & Maine Railroad as Chair.⁴⁴ The following year MTA streetcar fares increased from \$0.10 to \$0.18.⁴⁵ Herter won reelection in 1954, but did not seek reelection in 1956. He became Undersecretary of State in 1957, and the United States Secretary of State under President Dwight Eisenhower in 1959. He also served as US Trade Representative under Presidents Kennedy and Eisenhower from 1962 to 1966.

Former Massachusetts Treasurer Foster Furculo became Governor in January 1957 and served two 2-year terms. In May 1957, Frank W. Rourke resigned as MTA Board Chair citing health reasons, and was replaced by attorney Anthony Pompeo.^{46,47} Longtime GM Edward Dana retired in 1959,⁴⁸ the same year the new Highland Branch extension opened connecting the new Riverside Station on the Newton/Weston line just off the new Route 128 highway to the central subway,

⁴³ "Senate Approves Herter Bill to Reorganize M.T.A., Boston Globe, Feb 20, 1953, p. 1

⁴⁴ "New M.T.A. Board of 3 Will be Named Today" by: William J. Lewis, Boston Globe, Mar 26, 1953, p. 1

⁴⁵ "MTA Fare Hike Causes Lineup for 18c Tokens" Boston Globe, Apr 12, 1954 p. 1

⁴⁶ "Rourke Resigns as Chairman of M.T.A. Board" Boston Globe, May 7, 1957, p. 21.

⁴⁷ "M.T.A. Fare Hike Decision up to 14 Cities, Towns" Boston Globe, Jun 11, 1957, p. 1

⁴⁸ "Dana quits, New M.T.A. Boss Picked" by William J. Lewis, Boston Globe, Jul 5, 1959, p. 1

with stations in Newton, Brookline and in the Fenway area of Boston.⁴⁹ Today this line is the Green Line's D Branch. Despite this new line, and its attempt to attract new suburbanites to rapid transit, MTA's deficits continued. MTA General Counsel Willis B. Downey became acting GM upon Dana's retirement.⁵⁰

Between 1950 and 1970, the population of the city of Boston decreased from 801,444 to 641,071 (-160,373), while the population of Boston's metropolitan area increased from 3,065,344 in 1950 to 3,708,710 in 1970 (+643,366).⁵¹ As Boston's suburban population grew, the region's passenger railroads declined. The New York, New Haven & Hartford; and the Boston & Maine railroads dominated passenger and commuter rail into and out of Boston for most of the 20th century prior to 1970. These railroads faced financial difficulties due to declining ridership caused by the Great Depression, a short-term reprieve due to increased wartime ridership in the early 1940s, followed by a long period decline throughout the 1950s and 1960s. As revenues declined, maintenance and modernization efforts were postponed or ignored, leading to declines in quality. Fares were also increased leading to a further loss of ridership. In response to revenue loss and profit declines, railroads sometimes raised fares, cut service, and/or abandoned right-of-way. Many railroads sought subsidies from cities, towns, and the Commonwealth to maintain commuter services.⁵² By the early 1960s, calls from suburban communities for the state to subsidize commuter rail services grew.⁵³ However, the structure of the MTA offered little incentive for the 14 cities and towns, which were

⁴⁹ "Highland Branch Open: Many Bunk in Field for Ride on MTA" by Ronald Wysocki, Boston Globe, Jul 5, 1959, p. 1

⁵⁰ "Dana quits, New M.T.A. Boss Picked" by William J. Lewis, Boston Globe, Jul 5, 1959, p. 1

⁵¹ <http://www.demographia.com/db-bos1790.htm>

⁵² "Federal Aid to Help Rebuild 430 Miles of Highways in Massachusetts: Railroads Need Subsidies, Too, Alpert Declares" by Harry Stanton, Boston Globe, Apr 30, 1957.

⁵³ "Divided We Stall" Boston Globe Op/Ed, Dec 20, 1961. P. 12.

responsible for its deficits, to support paying for transportation services outside of their area.

Thomas J. McLernon, GM of New York City's subway system, was hired to lead Boston's MTA in May of 1960.⁵⁴ McLernon had a reputation for clearing deficits through strict management and economization.⁵⁵ McLernon was the MTA's third choice for the post. The MTA Board had previously offered the position to acting GM, and MTA General Counsel Willis B. Downey, as well as to Tennessee Central Railway Company President Earl L. Keister of Nashville, Tennessee. However, the MTA Advisory Board vetoed the appointments of both Downey and Keister.⁵⁶ Less than one month into McLernon's tenure, in August 1960, the Carmen's Union, representing bus, streetcar, and subway operators plus many others went out on a one-day strike. The Boston Globe reported that traffic on that day, Monday August 2, 1960, was the worst in Boston's history, with gridlock snarling Boston's streets, as significantly more private vehicles drove to and from downtown Boston given the absence of trains and buses.⁵⁷ Governor Furculo did not seek reelection in 1960, and John. A. Volpe took office in January 1961 for a 2-year term.

1st Volpe & early Peabody Administrations- 1961-1964:

Prior to his election as Governor, Volpe served as Commissioner of Public Works during the Herter Administration, and as the first Federal Highway Administrator under President Eisenhower in the mid-1950s.^{58,59} Volpe owned and operated a successful contracting company, which built many roads and highways in eastern

⁵⁴ "M.T.A. Trustees Want N.Y. Transit Boss" Boston Globe, May 20, 1960, p. 1

⁵⁵ "Thomas McLernon, 80; his tenure as head of MBTA [Sic.] was stormy", Boston Globe May 16, 1986 p. 67

⁵⁶ "M.T.A. Trustees Want N.Y. Transit Boss" Boston Globe, May 20, 1960, p. 1

⁵⁷ "M.T.A. STRIKE ENDS" Boston Globe, Aug 23, 1960.

⁵⁸ "Volpe Polls GOP Groups" Boston Globe, Jan 29, 1960, p. 17

⁵⁹ "GOP Picks A Master Builder: John Volpe" by: Ray Richard, Boston Globe, Jun 12, 1960, p. 65

Massachusetts. On Saturday, March 31, 1962, Carmen's Union members went on strike for the second time in 15 months, despite a judge's order prohibiting such an action.⁶⁰ Just after midnight, early on Sunday, April 1, Governor Volpe requested, and the legislature approved, a 45-day emergency control measure granting Volpe, or his designee, the authority to hire and fire any MTA employee, ignore collective bargaining agreements, and levy civil fines against striking employees.⁶¹ The strike ended later that Sunday, and almost all employees reported as required for work Monday morning.⁶² Throughout 1962, 1963 and 1964, GM McLernon slashed spending at the MTA, leading to poor system performance as maintenance and vehicle upkeep either slowed or stopped. Throughout this time labor unrest continued as the Carmen's Union sought increased pay and benefits. This all took place against a backdrop of failing private railroads, increased traffic and congestion, demands for system expansion, and municipal dissatisfaction with deficits and the overall MTA structure. Volpe was defeated in the 1962 election by Endicott Peabody, who took office in January 1963 for a 2-year term.

MBTA ERA - 1964-2024:

In August 1964, Governor Peabody swore in the original 5 members of the new MBTA Board of Directors, declaring "The M.T.A. has now been taken over by the Massachusetts Bay Transportation Authority."⁶³ The new MBTA was responsible not just for subway and bus service in and around the Boston region, but also for subsidizing select commuter rail service to 64 additional communities. The MBTA

⁶⁰ "Court Order Fails To Insure Against Slowdown on MTA" by: Robert E. Walsh, Boston Globe, Mar 31, 1962.

⁶¹ "Volpe Seizes MTA, Named Whitney Czar; Acts Under Dramatic Power Authorized b Legislature in Extraordinary Late Session" By: Seymore R. Linscott, Boston Globe, Apr 1, 1962 p. 1

⁶² "Handling Emergencies Old Hat to Gen. Whitney" Boston Globe, Apr 1, 1962, p. 50

⁶³ "MBTA Sworn In-\$225-Million Transit Plan Starts-MTA Dead-McLernon Stays" Boston Globe, Morning Edition, Aug 4, 1964, p. 1.

Act of 1964 also expanded the Advisory Board to 78 cities and towns, granted it a veto over the appointment of MBTA GMs, empowered it to veto MBTA operating and capital budgets, and granted it the authority to confirm three of the five new MBTA directors.⁶⁴ The MBTA was also different from the MTA in that its debts were not backstopped by the Commonwealth, but instead were backed by a \$0.02 statewide tax on cigarettes. The MBTA was similar to the MTA, however, in that it inherited its predecessor's debts.⁶⁵ Governor Peabody appointed James McCormack the first Chair of the new Authority in 1964.⁶⁶ Peabody did not win his party's nomination for the 1964 election, and former Governor John Volpe was re-elected governor that year, defeating Lieutenant Governor Francis Bellotti.

2nd Volpe Administration- 1965-1969:

Former Governor John Volpe returned to office in January 1965 for a 2-year term. Just ahead of Volpe's inauguration, General Manager Thomas J. McLernon was fired by the MBTA Board,⁶⁷ which hired Rush B. Lincon to replace him. A career army officer, Lincoln retired in 1964 as a major general and head of the Traffic Management Service of the Department of Defense. Board Chair McCormack, who served with GM Lincoln in WWII, resigned in October 1964 for a Department of Defense position; and Governor Volpe appointed retired superior court judge Charles C. Cabot (for whom Cabot Yard is named) as the new MBTA Board Chair.⁶⁸ Despite a new name and increased authority, the public transportation system's challenges continued throughout 1965 and 1966, as debt service costs continued

⁶⁴ "MBTA – New Hope for Commuters, Industry" Boston Globe, Nov 19, 1964, p. 20.

⁶⁵ Wallace, Carol A. *MBTA fares: an analysis of current policy and practice*. MBTA Advisory Board, 1989, p. 19

⁶⁶ "Gen. McCormack to Run MBTA" by: Robert B. Hanron, Boston Globe, Jul 2, 1964, p. 1

⁶⁷ "McLernon Fired by M.B.T.A." By: Robert B. Carr, Boston Globe, Dec 30, 1964, p. 1

⁶⁸ "Judge Cabot Named MBTA Board Head" Boston Globe, Dec 23, 1965

to challenge its operating budget, labor unrest reared occasionally, and under-investments in maintenance and upkeep caused service delays. Increased calls to further subsidize ailing legacy commuter rail lines continued as well. In 1966, despite objections from the Senate President, Governor Volpe pushed through the Commonwealth's first 3% sales tax, as well as a \$0.02 tax increase on cigarettes, and a 30% increase on the liquor tax, with some of the new revenue earmarked for transportation.⁶⁹ Volpe won reelection later that year to the first 4-year Governor's term in Massachusetts history.

GM Rush B. Lincoln resigned in October 1967, and was replaced by Leo J. Cusick, the former superintendent of the New York City Transit Authority.^{70,71} In early 1969, Governor Volpe resigned to join President Nixon's cabinet as the nation's second Secretary of Transportation, turning over the governorship to Lieutenant Governor Francis W. Sargent.⁷² Sargent won election in his own right in 1971 and served one 4-year term until January 1975. Early in his term Sargent appointed Robert C. Wood to chair the MBTA Board. Wood previously served as Director of the Joint Center for Urban Studies at MIT and Harvard.⁷³ Following Wood's hiring, Sargent empaneled a Governor's Task Force on Transportation chaired by MIT's Professor Alan Altshuler to review ongoing projects and studies and report to him with recommendations.⁷⁴

⁶⁹ "It's V-Day: Volpe Signs Sales Tax" Boston Globe, Mar 2, 1966, p. 1

⁷⁰ "'No Pressure' to Oust Lincoln" by: Robert B. Carr, Boston Globe, Aug 16, 1967

⁷¹ "Lincoln Resigns as MBTA Boss" by: Robert B. Carr, Boston Globe, Sept 20, 1967, p. 1

⁷² "Volpe Bids State House Farewell" Boston Globe, Jan 17, 1969 p. 1

⁷³ "Harvard-MIT City Specialist to Be MBTA Chairman" by: Robert B. Hanron, Boston Globe, Sept 16, 1969, p. 1

⁷⁴ "Report to Governor Sargent On Immediate Action Opportunities" Governor's Task Force on Transportation", Jan 1970,

Sargent Administration- 1969-1974:

Leo Cusick resigned as GM in July 1970,⁷⁵ and Robert Wood resigned as Board Chair to become president of the University of Massachusetts that October.⁷⁶ Governor Sargent appointed Henry S. Lodge to replace Wood as Board Chair,⁷⁷ and MBTA Treasurer Joseph C. Kelly to replace Cusick as GM. Kelly was the 5th GM of the MTA/MBTA since the retirement of Edward Dana 11 year before.⁷⁸ Governor Sargent is perhaps best remembered for his decision in February 1970 to halt any further highway expansion in the Boston region and instead to transfer any leftover funds to public transportation.⁷⁹ This action is widely regarded as among the most important transportation decisions in the Boston region's history.

Despite a new name, the MBTA faced many of the same budget challenges that its predecessors faced. In December 1970, Boston Mayor Kevin White, who chaired the MBTA Advisory Board, announced that communities alone could not support the increasing deficits of the MBTA, and that statewide support was needed.⁸⁰ In 1971, Governor Sargent pushed through legislation creating the Commonwealth's first Secretary of Transportation as a cabinet position and appointed Alan Altshuler to the role.⁸¹ In 1972, the Advisory Board rejected the MBTA's request for an \$8.8 million supplemental budget, and formerly requested relief from covering MBTA deficits to the legislature.⁸² In June of that year, Sargent filed legislation calling for the Commonwealth to cover 50% of MBTA deficits, a vote that failed in the House

⁷⁵ "Cusick quits as MBTA general manager" by A.S. Plotkin, Boston Globe, Apr 2, 1970.

⁷⁶ "Wood named UMass head, says protest is 'healthy'" by: Nina McCain, "Boston Globe, May 14, 1970.

⁷⁷ "Lodge's Son Henry, 40, Named MBTA Chief to Replace Wood" by: A.S. Plotkin, Boston Globe, Aug 27, 1970.

⁷⁸ "Joseph C. Kelly named MBTA acting director" by: A.S. Plotkin, May 28, 1970. P. 17

⁷⁹ "Sargent Urges More Public Transit" by: A.S. Plotkin, Boston Globe, Feb 12, 1970, p.1

⁸⁰ "White Urges State Run Deficit-Ridden MBTA" by: Robert Carr, Boston Globe, Dec 22, 1970

⁸¹ "Transit expert moves right in" by: A.S. Plotkin, Boston Globe, Jun 26, 1971, p. 20.

⁸² "Defeated bills unite MBTA board" by: Robert B. Carr, Boston Globe, Jul 11, 1972, p. 5

of Representatives.⁸³ In July 1972, however, the legislature approved a bill that removed the Advisory Board's veto over MBTA budget measures for the remainder of that year, allowing the Board of Directors to spend what it felt was needed, and pass those costs along to the 78 cities and towns.⁸⁴

In June 1973, Board Chair Lodge resigned citing friction with Transportation Secretary Altshuler.⁸⁵ Lodge was replaced as Chair by Undersecretary of Transportation John T. Doolittle.⁸⁶ In November 1973, legislation relieving the 78 cities and towns of 50% of the cost of MBTA deficits was approved, effective for one year, with the state paying the other half. This legislation also created ten regional transportation authorities across the state, established a new five-member MBTA Board of Directors appointed by the Governor, and abolished the General Manager position effective with the end of GM Kelley's term in October 1975.⁸⁷ In 1974, Governor Sargent signed legislation making permanent the structure wherein the Commonwealth covered 50% of MBTA deficits, and cities and towns the remaining 50%.⁸⁸

1st Dukakis Administration- 1974-1978:

In 1974, Governor Sargent lost his bid for reelection to State Representative Michael Dukakis, who took office in January 1975. Dukakis named Frederick P. Salvucci, Boston Mayor Kevin White's chief transportation aide as the second Massachusetts Secretary of Transportation.⁸⁹ In March 1975, the MBTA hired

⁸³ "Sargent asks \$12m to keep MBTA going" by: A.S. Plotkin, Boston Globe, Jun 28, 1972.

⁸⁴ "Defeated bills unite MBTA board" by: Robert B. Carr, Jul 11, 1972 p. 5

⁸⁵ "Lodge resigns from MBTA; friction with Altshuler hinted" by: A.S. Plotkin, Boston Globe, Jun 8, 1973.

⁸⁶ "Doolittle named new MBTA chief" by: A.S. Plotkin, Boston Globe, Dec 11, 1973

⁸⁷ "Transport bills given final OK by Legislature" by: Joseph Fuerbringer, Boston Globe, Nov 27, 1973

⁸⁸ "Two towns lose MBTA rail service" by Robert B. Carr, Boston Globe, Nov 13, 1974, p. 53

⁸⁹ "Ecologists, mass transit advocates cheer as Salvucci is appointed" by: William A. Henry 3d, Boston Globe, Dec 31, 1974

Boston Deputy Mayor Robert Kiley, a veteran of the Central Intelligence Agency, as the MBTA's first "Superchief," a combination of Board Chair and GM under the 1973 legislation.⁹⁰ Under Kiley's tenure, the MBTA purchased 270 miles of Boston and Maine Railroad commuter rail lines; began the extension of the Red Line from Quincy Center to Braintree; the extension of the Red Line from Harvard Square towards Alewife; stabilized MBTA finances to reduce deficits, and worked cooperatively with the Carmen's Union on labor matters.⁹¹ Throughout the 1970s, federal support for infrastructure grew to as much as 80% of a total project's cost, with the Commonwealth covering the remaining 20%.⁹²

King Administration- 1979–1983:

Former Massachusetts Port Authority CEO Edward J. King defeated Dukakis for their party's nomination for Governor in the 1978 election, prior to winning the general election later that year, and taking office in January 1979. Almost immediately Governor King installed Robert L. Foster as Superchief, replacing Robert Kiley. Kiley went on to an admirable career in public transportation, first as Chairman and CEO of the New York City MTA from 1983 to 1991, and later as Commissioner of Transport for London from 2000 until 2006. Before becoming GM, Foster operated a 60-person, non-union, trash incinerator in Saugus. Foster's tenure as GM was problematic and in many ways a reversal of any improvements gained under Dukakis/Salvucci/Kiley. In December 1979, the Boston Globe ran a nine-part series outlining serious mismanagement issues at the MBTA including: political interference in discipline; patronage hiring; the highest operating cost per

⁹⁰ "Kiley decides to take the job as 'superchief' of the MBTA" by Robert A. Jordan, Boston Globe, Mar 26, 1975 p. 5

⁹¹ Wallace, Carol A. MBTA fares: an analysis of current policy and practice. MBTA Advisory Board, 1989, p. 23

⁹² "\$39 cut from MBTA budget request" by: A.S. Plotkin, Boston Globe, Aug 22, 1974, p. 3.

mile and lowest productivity among mechanics in the nation; mismanaged pension funds; financial fraud including theft; overtime abuse; rogue police officers acting without discipline; increased dropped trips; and a myriad of other issues.⁹³

“The Spotlight study found that a principal reason for weak management is an alliance of unions and the State House. The alliance, re-established by the administration of Gov. Edward J. King after a rupture under Gov. Michael Duakais, has historically undercut management efforts to upgrade labor productivity, and has doomed emergency programs to repair breakdown-prone Light Rail Vehicles, aging buses, and streetcars.”

-Boston Globe, December 16, 1979 p. 1

At the same time as the Spotlight series was published, the MBTA requested a \$12.1 million supplemental budget from the Advisory Board to keep the system running and meet its December 1979 payroll obligations. At the time, half of these costs would be passed onto the property tax payers of the 78 cities and towns in the MBTA District represented by the Advisory Board. The Advisory Board rejected this request, leading Governor King to declare an emergency on December 18, with authority to take personal control of the MBTA. With this authority, King overruled the Advisory Board, and unilaterally approved the supplemental budget request, passing these costs onto the 78 cities and towns which had rejected it. In response, MBTA Advisory Board Executive Director James E. Smith stated:

“The MBTA has no management, no budget discipline. We refused to be a party to pouring money down a hole.”⁹⁴

-James E. Smith, December 18, 1979

⁹³ See Boston Globe “Spotlight” stories Dec 16-25, 1979.

⁹⁴ “King to take over MBTA today: Vows action after board refuses to OK new funds” Walter V. Robinson, Dec 18, 1979, p. 1

In early 1980, Governor King named a 10-person “MBTA Task Force” to review the Authority and recommend changes. In April 1980, this task force recommended doubling the basic fare, increasing the statewide gas tax, and new taxes applied to tolls and parking within the inner core of the MBTA service district with revenue dedicated to the MBTA.⁹⁵ The report also recommended ending the Superchief position and separating the roles of Board Chair and GM, weakening the Advisory Board’s role, expanding the Board of Directors to 13 members with 5 elected from 5 separate geographical districts, and appoint the Secretary of Transportation *ex officio* Board Chair. Of these recommendations, only the fare increase was enacted, doubling rapid transit fares from \$0.25 to \$0.50.⁹⁶ The following year, rapid transit fares increased again from \$0.50 to \$0.75, before being reduced to \$0.60 in 1982.⁹⁷

In June 1980, Robert L. Foster resigned and was replaced by Transportation Secretary Barry M. Locke as Acting GM. With Locke’s appointment, Governor King appointed Undersecretary of Transportation James O’Leary as Acting Secretary of Transportation.⁹⁸ In August 1980, Locke’s MBTA requested a \$41.0 million supplemental budget, which the Advisory Board refused.⁹⁹ Ultimately, despite special legislative sessions, court proceedings, and attempted takeovers, the MBTA shut down all operations at midnight on Saturday, December 6, and remained closed all day Saturday into Sunday morning. In response, Governor King mobilized

⁹⁵ “T task force: Raise fares, taxes” by Charles A. Radin, Boston Globe, Apr 9, 1980.

⁹⁶ Wallace, Carol A. *MBTA fares: an analysis of current policy and practice*. MBTA Advisory Board, 1989, p. 23

⁹⁷ Wallace, Carol A. *MBTA fares: an analysis of current policy and practice*. MBTA Advisory Board, 1989, p. 24

⁹⁸ “Locke steps in as new T boss” by: Charles A. Radin, Boston Globe, June 10, 1980.

⁹⁹ “T directors ask spending hike of \$41 million” by Charles A. Radin, Boston Globe, August 20, 1980.

the Massachusetts National Guard, and the Legislature met in special session to consider the MBTA Reorganization Act.¹⁰⁰

Management Rights- 1980 MBTA Reorganization Act

The 1980 MBTA Reorganization Act granted the Authority the \$41 million it requested, with the state paying 75% and the 78 MBTA communities the remaining 25%. The passage of Proposition 2½ in 1980 limited municipal tax increases, essentially ending the ability of municipalities to cover the net cost of service of MBTA expenses after the June 30, 1980. The Reorganization Act enshrined management rights at the T, setting in state law, for instance, the covenant that inherent management rights cannot be subject to collective bargaining. It also ended automatic cost of living increases in collective bargaining contracts, barred overtime earnings from counting towards pension calculations, authorized the hiring of part-time employees, and established a joint labor-management committee to collaborate on setting worker productivity standards. This act also increased the size of the MBTA Board from 5 to 7 members, named the Secretary of Transportation *ex officio* Board Chair, separated the duties of Board Chair and GM, and capped MBTA spending growth at 4% over its previous year's amount.¹⁰¹ To not exceed this 4% cap, the Authority almost immediately began cutting commuter rail service and reducing bus frequencies, including cutting all Sunday service effective January 1, 1981.^{102,103}

¹⁰⁰ MBTA Service Shuts Down; State Legislature Deadlocked” by: I. Joseph Garcia and William E. McKibben, The Harvard Crimson, December 6, 1980,

¹⁰¹ “King signs bill, says T to run today” Boston Globe, December 7, 1980, p. 1.

¹⁰² “Commuter-rail, bus cutbacks” Boston Globe, December 8, 1980, p. 24.

¹⁰³ “Board votes to shut down T on Sundays starting Feb 1” by Charles A. Radin, December 31, 1980.

In April 1981, James O’Leary and Barry Locke switched roles, with O’Leary becoming GM and Locke returning to his prior role as Secretary of Transportation, and MBTA Board Chair under the Management Rights legislation.¹⁰⁴ Locke’s tenure was a short one, as just one month after retaking office, Governor King suspended him on suspicion of accepting bribes related to MBTA leases and development. Locke was ultimately convicted of conspiracy to accept bribes,¹⁰⁵ and sentenced to 7 to 10 years in the state’s maximum-security prison.¹⁰⁶ In a rematch of the 1978 race, Dukakis defeated King for their party’s nomination for Governor in the 1982 election, which Dukakis won this time, and retook office in January 1983.

2nd & 3rd Dukakis Administrations- 1983-1991:

Dukakis served as Governor from 1983 to 1991. O’Leary served as GM from 1983 until 1989, and Fred Salvucci returned as Secretary of Transportation and MBTA Board Chair from 1983 to 1991. Thomas P. Glynn, III replaced O’Leary in 1989, serving until 1991.¹⁰⁷ These 8 years of the Dukakis/Salvucci/O’Leary/Glynn era represent perhaps the most stable period of leadership in Boston public transportation history, as well as among its best periods of performance.¹⁰⁸ During this period, the Red Line extension from Harvard Square to Alewife opened, and multiple heavy and light rail stations were renovated. The Orange Line, which was elevated, was rerouted underground during this period, new cars were introduced on the Red, Orange and Green Lines, and the bus fleet was replaced with newer,

¹⁰⁴ “O’Leary named to run the T” Boston Globe, April 1, 1981 p. 1.

¹⁰⁵ “Locke found guilty in T kickback case” by Alan Sheehan, February 3, 1982.

¹⁰⁶ “The big word is Walpole” by: Jeremiah Murphy, Boston Globe, February 20, 1982. p. 13

¹⁰⁷ “T quietly ‘announces’ express bus fare hike” by: Jerry Ackerman, Boston Globe, Feb 18, 1989, p. 19

¹⁰⁸ See: <https://mbtaadvisoryboard.org/wp-content/uploads/2024/01/MBTA-Leadership.pdf>

more efficient and cleaner models. There was also relative labor-harmony, with no strikes held. Ridership grew consistently throughout this period.

Weld & Cellucci Administrations- 1991-2001:

Dukakis did not seek reelection in 1990, and former US Attorney William F. Weld became Governor in January 1991. Weld appointed Richard Taylor as Secretary of Transportation and Board Chair to replace Fred Salvucci.¹⁰⁹ Salvucci rekindled his long involvement with the Massachusetts Institute of Technology, where he remains a Senior Lecturer to this day. A Rhodes Scholar, Secretary Taylor had previously served on the MBTA Board of Directors, and was a local small business owner and real estate developer. GM Glynn resigned in April 1991, and was replaced by Bay Area Rapid Transit (BART) Deputy GM John Haley shortly thereafter.¹¹⁰ Tom Glynn went on to serve as Deputy Secretary of Labor under President Clinton, MassPort CEO, and Chairman of the MBTA Board of Directors from May 2003 to October 2004.

In September 1991, at Governor Weld's urging, rapid transit fares increased from \$0.75 to \$0.85, and bus fares from \$0.50 to \$0.60.¹¹¹ This would be the only fare increase of the 1990s. Throughout the administrations of Governor Weld and his successor, Paul Cellucci, from 1991 to 2001, privatization of MBTA activities was a stated goal,^{112,113} and efforts to privatize certain bus maintenance and operation activities were attempted unsuccessfully in 1995 and 1998.^{114,115}

¹⁰⁹ "The Weld Cabinet" Boston Globe, Jan 3, 1991, p. 18

¹¹⁰ "MBTA votes to raise fares, hire new general manager" by: Matthew Brelis, Boston Globe, Jul 19, 1991, p. 1

¹¹¹ "It costs more to ride T today" Boston Globe, Sept 3, 1991, p. 26

¹¹² "Panel has reservations about privatization" by: Peter J. Howe, Boston Globe, Feb 6, 1992, p. 32

¹¹³ "The costly truth about privatization" by Robert A. Jordan, Boston Globe, Jan 18, 1997, p. 40

¹¹⁴ "Weld veto of MBTA hearings bill angers foes of privatization plan" by: Tom Moroney, Boston Globe, Jun 25, 1995

¹¹⁵ "Cellucci backs off effort to hire out MBTA services" by: Frank Phillips, Boston Globe, Feb 3, 1998, p.19

Throughout the 1990s, the Big Dig loomed as the largest transportation construction initiative in the region, and both Weld and Cellucci and their Transportation Secretaries grappled with how to fund, manage, mitigate, and balance its needs against other transportation initiatives in the Commonwealth. The Big Dig depressed a formerly-elevated highway along the Boston waterfront, and constructed a new highway tunnel from downtown to Logan Airport. Though technically a highway project, the Big Dig, more formally known as the Central Artery/Third Harbor Tunnel Project, dramatically affected the MBTA. In December 1990, the Commonwealth and Conservation Law Foundation entered into legally binding agreements that committed the State and the MBTA to build additional transit projects in return for the end of lawsuits looking to stop the issuing of key environmental permits needed to construct the Big Dig.¹¹⁶ The projects committed to were:¹¹⁷

- Lynn Station upgrades including a renovated parking garage and bus terminal
- North Station high platforms and new tracks/berths
- South Station bus terminal improvements
- South Station track #12 construction
- Ipswich line extension to Newburyport
- Old Colony line extension to Middleboro/Lakeville & Kingston/Plymouth
- Framingham line extension to Worcester
- 10,000 transit oriented parking spots
- Build and operate an electrified Silver Line to the Seaport
- Lengthen all Blue Line platforms to support longer trainsets
- Build new stations and ROW on the Fairmount line
- Extend the Green Line from Lechmere to Medford Hillside & Union Square
-

¹¹⁶ "Artery environmental plan set" by: Larry Tye, Boston Globe, Dec 19, 1990, p. 1.

¹¹⁷ Source: <https://www.govinfo.gov/content/pkg/FR-1994-10-04/html/94-24421.htm>

The cost of these projects paid by the MBTA from inception to completion is estimated at \$8.03 billion in principal and interest.¹¹⁸

Secretary Taylor resigned in December 1992, and was replaced by Highway Commissioner James Kerasiotes, who also served principal for the Big Dig.¹¹⁹ Today, Taylor is a professor of real estate at Suffolk University, and remains involved in real estate development. Jim Kerasiotes started in Massachusetts politics as an aid to Governor Ed King's Commerce Commissioner, before starting a chain of newspapers in 15 communities west of Boston.¹²⁰ While serving as Highway Commissioner, Transportation Secretary, and Chairman of the Massachusetts Turnpike Authority (Masspike) from 1991 to 2000, Kerasiotes remained the individual most closely linked with public management of the Big Dig during this period. After leaving government, Kerasiotes worked in numerous private sector positions before serving six months in jail for tax evasion in 2015.¹²¹

William Weld won reelection in November 1994. In April 1995, GM John Haley resigned as MBTA GM to become a top executive at the Port Authority of New York and New Jersey.¹²² Haley's chief of staff Robert L. Marbardy served as acting GM until September 1995, when Undersecretary of Transportation Patrick J. Moynihan became GM.^{123,124} Governor Weld resigned office in July 1997, elevating Lieutenant Governor Paul Cellucci to Acting Governor.¹²⁵ As Acting Governor, Cellucci

¹¹⁸ "MBTA: A History of Funding" presentation to BOD 1/25/24

¹¹⁹ "MBTA warns it may need bailout" by: Andrew Blake, Boston Globe, Oct 24, 1992, p. 13.

¹²⁰ "As his stock sinks, Kerasiotes remains resolute" by Thomas Farragher, Boston Globe, Apr 10, 2000, p. 1.

¹²¹ "Former Secretary of Transportation James Kerasiotes Sentenced to Six Months in Jail for Tax Evasion" US Attorney's Office, Boston, Massachusetts, Press Release, Feb 5, 2015.

¹²² "Being taken by the cleaners" by: Robert A. Jordan, Boston Globe, Apr 18, 1995, p. 44

¹²³ "Interim manager is named for MBTA" by: Thomas C. Palmer, Boston Globe, Apr 6, 1995.

¹²⁴ "New MBTA leader starts in era of cuts" by Thomas C. Palmer, Jr. Boston Globe, Aug 10, 1995, p. 30

¹²⁵ "Governor set to resign tomorrow" by: Don Aucoin and Frank Phillips, Boston Globe, Jul 28, 1997, p. 1.

appointed GM Moynihan as Secretary of Transportation, to replace Kerasiotes. Kerasiotes had served as both Secretary and Masspike Chairman under Weld, but Cellucci separated these roles between two individuals.¹²⁶ Kerasiotes served as Masspike Chairman until April 2000.¹²⁷

Robert Prince replaced Moynihan to become the first African American GM in Boston public transportation history in 1997.¹²⁸ Prince spent his entire career at the MBTA, rising through the Authority's ranks as a bus driver, guard, motorman, inspector, chief inspector, train starter, dispatcher, night supervisor, deputy superintendent, chief operating officer, and deputy GM.¹²⁹ In December 1998, Cellucci appointed former Lawrence mayor and then-highway commissioner Kevin J. Sullivan as Secretary of Transportation, replacing Patrick Moynihan, who became project director of the Big Dig along with Kerasiotes.¹³⁰ Moynihan today works as an attorney in private practice.

Throughout the 1990s and early 2000s, the MBTA's commuter rail continued to expand, as the Commonwealth and MBTA worked to meet the requirement of the consent decree the state signed with the Conservation Law Foundation in the waning days of the Dukakis administration. Commuter Rail service to Worcester began incrementally in 1994, with infill stations being added between Framingham and Worcester throughout the 1990s and 2000s. Revenue service on the Middleborough/Lakeville and Kingston/Plymouth lines commenced in 1997, while

¹²⁶ "Hiring at T overhauled to fight bias" by: Thoams C. Palmer, Jr., Boston Globe, Jun 6, 1997, p.1.

¹²⁷ "Cellucci fires Kerasiotes after US says it was betrayed on overruns" by: Tina Cassidy and Bob Hohler, Boston Globe, Apr 12, 2000

¹²⁸ "Kerasiotes to keep transport reins from new post at Mass. Turnpike" by: Frank Phillips, Boston Globe, Jun 3, 1997, p. 28

¹²⁹ "Second in command the object of admiration, scorn" by Zachary R. Dowdy, Boston Globe, Feb 24, 1997.

¹³⁰ "Cellucci appoints three to transportation positions" by Thomas C. Palmer, Jr., Boston Globe, Dec 18, 1998, p. 88

on the north side, service to Newburyport commenced in 1998. The Greenbush line to Scituate opened in 2007.

Between 1974, when the State first began to pay half of its deficits, until 1999, the financial structure of the MBTA remained largely unchanged, except in one important area. As mentioned above, in 1980, “Proposition 2½” was approved by popular referendum in Massachusetts, limiting property tax rate growth to no more than 2.5 percent per year in almost all cities and towns in Massachusetts. For MBTA financing, this limited the amount cities and towns could contribute to cover the Authority’s deficit, capping the growth of the total amount assessed at 2.5 percent over the previous year’s amount. Thus, after 1980, the State began covering more than 50% of the T’s deficits.¹³¹ By the late 1990s, the cost of state support for the MBTA had grown significantly, and continued to grow year after year despite management attempts to rein in costs. By the end of the decade, the Commonwealth was contributing over \$600 million to the MBTA annually, as well as backstopping its debts, and loaning it cash on a short term basis due to ongoing cash-flow issues.¹³² For state budget writers, the MBTA’s financial structure had become a budgetary black hole, and a proverbial budget buster. Since the MBTA operated on a calendar year fiscal year, and the Commonwealth on a July 1 to June 30 fiscal year, by the late 1990s, the MBTA’s deficits were 18 months old, beyond legislative oversight, perceived as too big, unmanaged, and ever growing.

¹³¹ “Taking the T ... To the Next Level of Progress” MBTA Blue Ribbon Committee Report on Forward Funding, Apr 2000. P 8-9

¹³² “MTF Report: Urgent Need for MBTA Fiscal Reform” Massachusetts Taxpayers Foundation News Release, Jun 14, 1999.

Forward Funding:

Forward Funding ended the system where MBTA deficits were paid in arrears, and instead provided a guaranteed amount revenue to the Authority and required it to operate, pay its debt service and support its infrastructure maintenance and expansion program from these guaranteed revenues. Unfortunately, geopolitical and macro-economic changes meant that the amount of statewide sales tax collected, a portion of which formed the majority of the MBTA's guaranteed revenue, declined over the course of the 2000s, burdening the Authority's finances while it continued to borrow for popular expansion projects, and needed infrastructure maintenance. The MBTA achieved a balanced budget without financial gimmickry once under Forward Funding, in fiscal year 2001, and has been in a structural deficit ever since. In addition, municipalities ceased funding deficits, and instead began paying assessments to the Authority at the beginning of its fiscal year. The MBTA service area was also increased from 78 cities and towns to 178 today. Any community that hosted an MBTA station, or abutted one that did was included in the service district, except for the Town of Avon, which was excluded in error despite abutting 4 communities that host stations. Assessments were, and continue to be based solely on population.

In April 2000, as part of the budget process for fiscal year 2001, the MBTA Board of Directors empaneled a Blue Ribbon Commission, chaired by the then Senate Chair of the Legislature's Joint Committee on Transportation, to issued what has come to be known as the Forward Funding Finance Plan. This plan recommended several changes:

- Dedicate a portion of fare revenue to system improvements
- Implement Automated Fare Collection

- Achieve a revenue recovery ratio sufficient to cover 50% of operating costs
- Implement fare increases incrementally between 2000 and 2005
- Focus on maintenance and modernization over expansion
- Cap expense growth to not greater than the rate of inflation
- Implement novel transportation financing mechanisms
- Conduct a management and governance review
- Conduct a top-to-bottom review to reduce headcount
- Continue the Blue-Ribbon Commission
- Enact multiple fare increases over 5 years
- Achieve \$5 million per year in new non-fare revenue
- Realize a 2% decline in operating expenses each year, every year
- Cease issuing new debt.

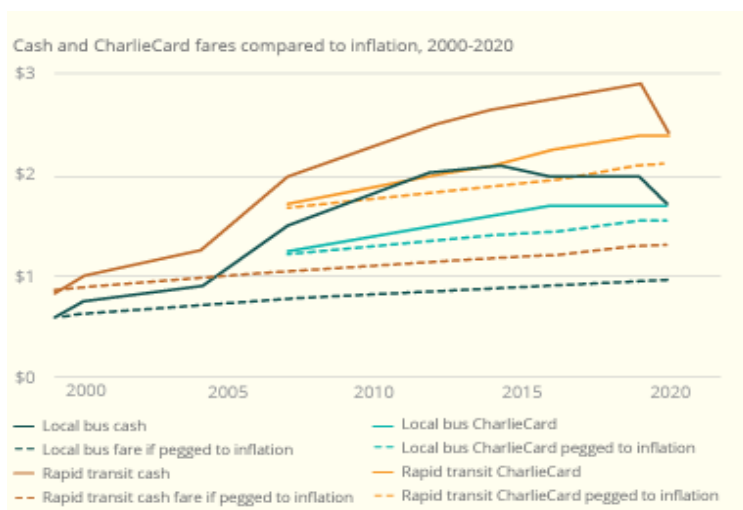
When issued, report writers and many in leadership believed that the sales tax would generate so much revenue that the MBTA would not need to issue anymore debt, and that it could not only pay down the debts it already had, but also pay for expansion, and needed maintenance improvements from surplus sales tax revenues.¹³³ The Forward Funding legislation also expanded the size of the MBTA Board of Directors from seven to nine members. The MBTA's infrastructure was far from new or modern when Forward Funding passed. Despite the hopefulness of the Forward Funding Finance Plan, the Authority borrowed \$1.85 billion to support the purchase of new vehicles, and to make needed improvements to its infrastructure. The backlog of system preservation needs was estimated at \$3 billion in 2003.¹³⁴ This was the estimated cost needed to bring the MBTA's infrastructure to a condition where all assets could operate at their optimal performance levels. In addition, the system was also far from accessible for persons with disabilities, despite federal and state legal requirements. In 2006, the MBTA

¹³³ "MBTA Review" David D'Alessandro, Paul Romary, Lisa Scannell, Bryan Woliner; Nov 1, 2009

¹³⁴ MBTA Program for Mass Transportation, May 2023 (Revised Jan. 2004), p. 1-2.

agreed to a binding legal settlement to make all buses, trains, stations, and all other public-facing infrastructure 100% accessible for all persons with disabilities, including multiple redundant elevators at stations, and other investments. This settlement, the cost of which was not imagined in the Forward Funding Financing Plan, added hundreds of millions more in capital costs to the MBTA's debts, paid from by its operating budget.

The Forward Funding Finance Plan did suggest a 23.2% average fare increase effective 2000, the first such increase since 1991. Faced with lagging sales tax revenue growth, massive debt service payment requirements and other cost increases, the MBTA raised fares 3 times between 2000 and 2009 and 4 times from 2010 to 2019. Research from the pro-labor Public Transit Public Good group reveals that the MBTA raised fares in 2000, 2004, 2007, 2009, 2012, 2014, 2016 and 2019, with fares rising faster than inflation over that period, and cash fares nearly tripling from 1999 to 2019.¹³⁵



Source: Susanna Bohme, PhD "Un-Fare Deal: How Fare Policy at Baker's MBTA Transfers Wealth from Riders to Corporations" December 2021. Used with permission.

¹³⁵ Bohme, Susanna "Un-Fare Deal: How fare policy at Baker's MBTA Transfers Wealth from Riders to Corporations", Dec 2021.

Swift & Romney Administrations- 2001 – 2007:

Governor Paul Cellucci resigned in April 2001 to become ambassador to Canada, elevating Lieutenant Governor Jane Swift to Acting Governor.¹³⁶ Bob Prince retired as GM in December 2001, going onto a successful career as a transportation consultant. Michael Mulhern succeeded Prince as GM.^{137,138} Like Prince, Mulhern spent his entire career at the MBTA, starting as a track laborer, before advancing to bus driver, motorperson, dispatcher, subway line chief, director of subways, chief operating officer, and deputy general manager.¹³⁹ In March 2001, Transportation Secretary Kevin Sullivan, became Secretary of Administration and Finance for Governor Swift.¹⁴⁰ James Scanlan, who worked at the MBTA in procurement and capital project management succeeded Sullivan as Transportation Secretary and MBTA Board chair.¹⁴¹ After Swift left office in January 2003, Scanlan went on to run the Lowell Regional Transit Authority until 2020.¹⁴²

Governor Swift did not contest the 2002 election, and businessman and future Utah Senator Mitt Romney took office in January 2003. He appointed former Registrar of Motor Vehicles Daniel Grabauskas as Secretary of Transportation.¹⁴³ Grabauskas served until 2005, when he replaced Michael Mulhern as MBTA GM. Mulhern retired in June 2005 after a 26-year MBTA career.¹⁴⁴ As of 2024, Mulhern continues to work in public transportation as Chief Operating Officer for Alternative Concepts

¹³⁶ "Swift's moved create tension" by Frank Phillips, Boston Globe, Apr 7, 2001, p. 1

¹³⁷ "T panel urges tighter security" by Raphael Lewis, Boston Globe, Nov 21, 2001, p. B1

¹³⁸ "MBTA approves Greenbush Line" by: Mac Daniel, Boston Globe, Feb 15, 2002., p. 42

¹³⁹ "MBTA native son takes the helm" Progressive Railroading, Mar 6, 2002.

¹⁴⁰ "Amorello may chair Turnpike" Boston Globe, Feb 3, 2002, p. 31

¹⁴¹ "MBTA buys troubled South Shore ferry line" by: Mac Daniel, Boston Globe, Apr 11, 2002, p. 37

¹⁴² "LRTA director announces retirement" Lowell Sun, Sept 25, 20202.

¹⁴³ "Grabauskas gets a top state job" Boston Globe, Dec 29, 2002, p. 12

¹⁴⁴ "T keeps fares the same, but nixed Night Owl service" by: Mac Daniel, Mar 12, 2005, p. 17

Inc., a well-respected public transportation consultancy and contract operator. Highway Commissioner John Cogliano replaced Grabauskas as Secretary of Transportation in May 2005.¹⁴⁵ Cogliano served until Romney's term ended in January 2007. Today Cogliano is CEO of the Plymouth and Brockton Street Railway, a local charter and point-to-point coach bus operator.

As part of the 2004 fare increase, Governor Romney issued an executive order calling for "...a comprehensive financial review, to identify and eliminate inefficiencies..."¹⁴⁶ It seems that those who supported Forward Funding in 2000, and who could not understand or explain why it had not worked in 4 years, latched onto a new cause for the T's financial woes - inefficiencies.¹⁴⁷ For the next 5 years, many politicians, advocates, think tanks, officials, editorials, and others opined that the best way to solve the MBTA's underlying structural and cyclical operating budget deficits, crumbling infrastructure, and crippling debt was some combination of administrative reform, governance changes, management-consultant reports, reviews, studies, and rhetoric.

Given the political popularity for reform and consolidation, in July 2004, Governor Romney signed into law Chapter 196 of the Acts of 2004, "An Act Restructuring the Transportation System of the Commonwealth" which he predicted would save "tens of millions of dollars."¹⁴⁸ This legislation, among other things, established the Office of Transportation Planning within the Department of Transportation to engage in all planning activities for all transportation agencies in the state. This Act

¹⁴⁵ "Romney names new transportation chief" by: Mac Daniel, Boston Globe, May 3, 2005, p. 30

¹⁴⁶ Rick Klein and Mac Daniel "MBTA gets a go-ahead to hike fares" Boston Globe, Aug 22, 2023, p. B5

¹⁴⁷ See: "The Road to Reform: Restructuring the Commonwealth's Transportation Agencies" by the Massachusetts Taxpayers Foundation and Artery Business Committee (ABC), May 2004.

¹⁴⁸ Scott Greenberger, "Governor signs key transit bill" Boston Globe, Jul 22, 2004 p. 23

also created the Transportation Finance Commission (TFC) to examine and recommend ways to finance transportation in Massachusetts. The text of the Act is filled with references to administrative savings, consolidation and efficiencies. Senator Steve Baddour, the then Senate Chair of the Legislature’s Joint Committee on Transportation, stating that this law represented “the most comprehensive and far reaching transportation bill in decades.”¹⁴⁹

Transportation Finance Commission:

In 2004, Governor Romney appointed a group of experts from across the Commonwealth to analyze the long and short term financial needs of the transportation system, its agencies, recommend changes, and suggest revenue options to close funding gaps.¹⁵⁰ In March 2007, three months into the administration of Governor Deval Patrick, the TFC offered a report in two volumes, one offering its findings, and the second offering its recommendations. Volume 1 detailed a massive shortfall across the entire transportation network everywhere in the Commonwealth, estimating that nearly \$20 billion was needed between 2007 and 2027 just to maintain the state’s existing infrastructure.¹⁵¹ The TFC summarized its findings in 4 overarching categories:

- A. Virtually every transportation agency in the state is running structural deficits and resorting to short-term quick fixes that hide systemic financial problems;
- B. The condition of our roads, bridges, and transit systems are all in broad decline;
- C. Revenue is being squeezed from all sides; and

¹⁴⁹ Scott Greenberger, “Governor signs key transit bill” Boston Globe, Jul 22, 2004 p. 23

¹⁵⁰ See Chapter 196 of the Acts of 2004

¹⁵¹ Transit and roads face huge shortfall by: Mac Daniel, Boston Globe, Mar 29, 2007 p. A1

D. Massachusetts has no money for transit or highway enhancements or expansions without further sacrificing existing systems and exacerbating problems.¹⁵²

Volume 2 of the TFC's report, offering solutions, was published in September 2007. It offered a series of reforms projected to save \$2.45 billion over 20 years across all transportation agencies, and also suggested \$18.7 billion in new taxes, fees, tolls, fares and other revenue options.¹⁵³ The report recommended, among other things, an \$0.115 per gallon increase in the gas tax, regular and predictable fare increases on the MBTA, toll increases on the Masspike, direct road user fees, and other ideas. Perhaps unsurprisingly, the recommendations for so-called reforms were embraced by elected officials, as were toll and fare increases, while recommendations calling for tax increases were less popular.

Patrick Administration- 2007-2014:

Mitt Romney did not contest the 2006 election, and attorney Deval Patrick became Governor in January 2007. Patrick received the TFC's report shortly thereafter, where it remained largely unacted upon. Patrick appointed Bernard Cohen as the first of what would be five transportation secretaries over the course of his eight years in office.¹⁵⁴ Cohen previously held positions at the New York MTA, and at Philadelphia's public transportation entity. Cohen served until early 2009, when he was replaced as Secretary and MBTA Board Chair by James A. Aloisi, Jr., a lawyer who previously served as an attorney for the Turnpike Authority, and also as a member of the TFC.¹⁵⁵ Today Cohen works as a transportation consultant.

¹⁵² "Transportation Finance in Massachusetts: An Unsustainable System" Vol 1, Transportation Finance Commission, Mar 2007, p. 3.

¹⁵³ "Transportation Finance in Massachusetts: Building a Sustainable Transportation Financing System" Vol 2. Transportation Finance Commission, Sept 17, 2007.

¹⁵⁴ "Patrick names transit secretary" by: Michael Levenson, Boston Globe, Dec 24, 2006, p. 17

¹⁵⁵ "Aloisi named secretary of transportation" by: Matt Viser, Boston Globe, Dec 20, 2009 p. B1

Despite the 2004 Reform Legislation, and the predictions of millions in savings available to eliminate deficits, by fiscal year 2009, the MBTA faced an operating budget deficit of \$160 million¹⁵⁶ To fill this gap, mitigate toll increases, and fund other initiatives Governor Patrick and Secretary Aloisi requested a \$0.19 per gallon gas tax increase from the Legislature.¹⁵⁷ Despite a veto threat, the Legislature instead increased the state sales tax from 5% to 6.5%, which provided an additional \$160 million to the MBTA, closing its budget gap.¹⁵⁸ In August 2009, Aloisi and Patrick forced GM Grabauskas to resign, essentially buying out the remaining 9 months of his employment agreement for \$327,487.¹⁵⁹ Grabauskas would have earned \$161,250 had he worked the final 9 months of his contract. MBTA General Counsel William Mitchell became acting GM, replacing Grabauskas. Aloisi followed Grabauskas just over 1 month later, resigning under pressure after 8 months as Secretary.¹⁶⁰ Today Aloisi works as a transportation consultant, lecturer, and frequently contributes to local radio and media publications on the topic of transportation. Dan Grabauskas went on to serve as CEO of the Honolulu Authority for Rapid Transportation (HART), and Executive Director of Commuter Rail for the MBTA.

2009 Transportation Reform:

The 2009 Transportation reform legislation abolished the Executive Office of Transportation, Aeronautics Commission, Highway Commission, the Massachusetts Turnpike Authority, and merged the governance and operation of

¹⁵⁶ "Final Report to the MBTA Advisory Board: MBTA Fiscal Year 2010 Budget Request" MBTA Advisory Board, May 28, 2009

¹⁵⁷ "Patrick seeks hike of 19 cents in gas tax" by: Noah Bierman, Boston Globe, Feb 20, 2009, p.A1.

¹⁵⁸ "Patrick hints at hike in gas tax" by: Matt Viser, Boston Globe, Jun 30, 2009, p. A1

¹⁵⁹ "T chief resigns under pressure" by Matt Viser, Boston Globe, Aug 7, 2009, p. A1

¹⁶⁰ "Embattled transit chief Aloisi quits" by: Andrea Estes and Noah Bierman, Boston Globe, Sept 12, 2009.

these, along with that of the Secretary of Transportation's office, the office of transportation planning, the MBTA and Registry of Motor Vehicles, into a single entity called the Massachusetts Department of Transportation or MassDOT. MassDOT, the public was told, would save money, increase efficiency, improve coordination and unite separate agencies under a single governance structure.¹⁶¹

For the MBTA, the creation of MassDOT abolished its independent Board of Directors, as well as the Advisory Board's authority to veto budgetary spending, ending any independent oversight of the region's public transportation agency. All such authority was transferred to a nine person MassDOT Board of Directors, all appointed by the Governor. This new Board took responsibility for MBTA debt issuance, budget approval, major contract approval, and overall oversight of the MBTA. It did this in addition to providing similar activities for the other transportation agencies. For the first time since 1981, the Secretary of Transportation did not chair the MBTA's governing body, a situation that remains to this day.

Despite the 2009 legislation, MBTA employees represented by labor unions retained their titles, pay, and labor affiliations. Two changes for MBTA employees were legislative mandates. The first was that whereas those employed by the Authority and participating in its retirement pension fund prior to 2009 retained their ability to begin receiving pension payments after 23 years of employment while those hired after 2009 could not begin receiving pension payments until after 25 years of employment and upon reaching at least the age of 55. The second

¹⁶¹ "Transportation reform in place, but not over" Boston Globe op/ed by: Therese Murray and Steven Baddour, Jul 9, 2009, p. A15

change required all MBTA employees to receive their medical insurance via the Commonwealth's Group Insurance Commission (GIC), and accept those plans offered by the GIC each year. Previously, most T employees had access to insurance plans collectively bargained for via the union contract process, with the Authority often paying 100% of the premiums for such plans. Under the GIC, however, premium costs for most employees were added on, and the number of plans, and premium costs to the Authority, decreased. Unionized employees shifted to the GIC as their labor contracts expired and were renegotiated.¹⁶² In 2015, MBTA labor unions won an arbitration award compelling the Authority to supplement the benefits of its employees through a health and welfare fund. This fund is budgeted to cost Authority \$21.2 million dollars in fiscal year 2025.¹⁶³

Just as with the 2004 version, the 2009 Reform Legislation failed to generate any significant savings to fix the MBTA's underlying financial issues. A review of MBTA Advisory Board oversight reports for the years following the 2009 legislation show multi-million dollar deficits annually, and a variety of gimmickry to close them such as debt restructuring,¹⁶⁴ selling future parking revenue,¹⁶⁵ selling the North Station garage,¹⁶⁶ increasing fares by 23%¹⁶⁷ and service cuts.¹⁶⁸ In 2013, the legislature approved a tax package that increased the gas tax by \$0.03, indexed future increases to inflation, hiked the price of a pack of cigarettes by \$1, and imposed new taxes on certain computer software to support transportation. This approval

¹⁶² Final Report to the MBTA Advisory Board: MBTA Fiscal Year 2010 Budget Request" MBTA Advisory Board, May 28, 2009

¹⁶³ MBTA FY25 Operating Budget

¹⁶⁴ "Final Report to the MBTA Advisory Board MBTA Fiscal Year 2011 Budget Request" MBTA Advisory Board, Jun 7, 2011

¹⁶⁵ "MBTA FY12 Operating Budget Oversight Report" MBTA Advisory Board, March 23, 2011.

¹⁶⁶ "MBTA FY12 Operating Budget Oversight Report" MBTA Advisory Board, March 23, 2011.

¹⁶⁷ "MBTA Fare Hikes, Some Service Cuts Take Effect This Sunday

¹⁶⁸ "MBTA Fare Hikes, Some Service Cuts Take Effect This Sunday

came as an override to Governor Patrick's veto, and passed without his signature.¹⁶⁹ From these sources, the MBTA received an additional \$115 million.¹⁷⁰ The taxes on computer software were repealed in 2013,¹⁷¹ and voters repealed the indexing of future gas tax increases to inflation via a statewide ballot in 2014.¹⁷² The MBTA received an additional \$125.4 million in FY15, \$187 million in FY16, \$140 million in FY17; and then an additional \$127 million each year for FY18 – FY22.¹⁷³

Aloisi was replaced as Secretary of Transportation by Jeffrey B. Mullen, an attorney in private and government practice, who became Secretary after serving as the last Chair of the Massachusetts Turnpike Authority.¹⁷⁴ William Mitchell was replaced as GM by Richard Davey, the GM of the Authority's commuter rail concessionaire the Massachusetts Bay Commuter Railroad March 2010.¹⁷⁵ Two years later, Davey replaced Mullen as Secretary of Transportation when Mullen resigned to return to private law practice.¹⁷⁶ MBTA Chief Financial Officer Jonathan Davis took over as interim GM in August 2011.¹⁷⁷ Davis was replaced over a year later by Beverly A. Scott, who was GM of Atlanta's transit system.¹⁷⁸ Davey resigned as secretary in 2014.¹⁷⁹ His career in transportation continued, serving as president of New York City's MTA from September 2022 to 2024. Davey currently serves as CEO of the Massachusetts Port Authority. Highway Administrator Frank DePaola became acting Secretary upon Davey's departure.¹⁸⁰

¹⁶⁹ "\$800m transportation bill passed" by Martin Powers, Boston Globe, Jul 25, 2013 p. B1

¹⁷⁰ <https://cdn.mbta.com/sites/default/files/2017-10/fy15-sore-history-budget-1991-2015.pdf>

¹⁷¹ "Patrick OK's tech tax repeal" by Michael B. Farrell, Boston Globe, Sept 28, 2013

¹⁷² "Election cycle was awash in money from outside groups" by David Scharfenberg, Boston Globe, Nov 13, 2024

¹⁷³ Figures from budget information provided annually to the MBTA Advisory Board as part of its budget oversight process.

¹⁷⁴ "Transportation chief pick draws praise" by Noah Bierman, Boston Globe, Sept 16, 2009, p. B2

¹⁷⁵ "Commuter rail head selected to run MBTA" by Brian MacQuarrie, Boston Globe, Mar 23, 2010, p. B1.

¹⁷⁶ "T chief to be transportation secretary" by Michael Levenson, Boston Globe, Aug 5, 2011, p. A1

¹⁷⁷ "Davis to steer MBTA as interim general manager" by Noah Bierman, Boston Globe, Aug 23, 2011, p. B3

¹⁷⁸ "Atlanta transit head hired for MBTA" by Eric Moskowitz, Boston Globe, Sep 25, 2012, p. B1

¹⁷⁹ "Davey will step down as chief of MassDOT" by Nicole Dungca, Boston Globe, Oct 14, 2014.

¹⁸⁰ "Davey will step down as chief of MassDOT" by Nicole Dungca, Boston Globe, Oct 14, 2014.

Baker Administration- 2015-2022:

Governor Patrick did not seek reelection in 2014, and former Weld and Cellucci cabinet secretary Charles D. Baker became Governor in January 2015. Baker named transportation advocate, and former CLF attorney Stephanie Pollack as his Secretary of Transportation.¹⁸¹ On January 25, 2015, snow began falling in the Boston region in what was the first of four major snow storms over the next four weeks that produced 80 inches of snow and multiple consecutive days of below-freezing temperatures.¹⁸² The MBTA did not perform well in such conditions, leading to mechanical failures, cancelled trips, delays, stranded passengers, and great frustration among passengers and policymakers alike.¹⁸³ In the wake of the MBTA's failures, GM Beverly Scott resigned on February 12, 2015.¹⁸⁴ Governor Baker quickly appointed a "Governor's Special Panel to Review the MBTA" which made a series of recommendations in April 2015,¹⁸⁵ many of which were codified in law. These included the creation of a 5-member Fiscal and Management Control Board (FMCB) appointed by the Governor; the elimination of caps on fare increases; mandated capital spending increases; mandated non-fare revenue increases from sources like parking and advertising; the hiring of a Chief Administrative Officer; and overall, austerity.¹⁸⁶

¹⁸¹ "Advocate of gas tax to lead agency" by: Jim O'Sullivan and Nicloe Dungca, Boston Globe, Jan 14, 2015.

¹⁸² "5 years ago: Digging out after the blizzard of 2015" WCVB Channel 5, Jan 27, 2020

¹⁸³ "Tough days for MBTA" by: Christina Pazzanese, The Harvard Gazette, Feb 27, 2015.

¹⁸⁴ "With riders at wit's end, Scott quits as MBTA leader" by: Nestor Ramos and Nicole Dungca, Boston Globe, Feb 12, 2015, p. A1

¹⁸⁵ Back on Track: An Action Plan to Transform the MBTA" Governor's Special Panel to Review the MBTA, Apr 8, 2015

¹⁸⁶ Bill H.3347 "An Act for a Reliable, Sustainable, Massachusetts Bay Transportation Authority" 189th Legislature (2015-2016)

Fiscal & Management Control Board:

Governor Baker approved the legislation creating the FMCB and appointed its 5 members to oversee all aspects of the MBTA on July 17, 2015.¹⁸⁷ A volunteer panel, it would serve until June 30, 2021, meeting nearly bi-week over this 6-year-long period to review almost all aspects of the MBTA.¹⁸⁸ Three of the FMCB's members, including its chairman, Joseph Aiello served for its entire 6-year tenure, despite an initial mandate of only 5-years.^{189,190} These volunteers donated countless hours of their time to seeking root causes of the MBTA's many issues, and altered its policies and procedures along the way. They deserve credit for their efforts.

The legislation creating the FMCB required that it:

“To establish 1- and 5-year operating budgets under section 20 of chapter 161A, beginning in fiscal year 2017, which are balanced primarily through a combination of internal cost controls and increase in own-source revenues and”.

-H. 3347 Section 5(b)

During the FMCB's tenure, fares increased twice, in 2016 and 2019, and capital spending on infrastructure maintenance increased precipitously. For instance, in FY14, the MBTA's actual capital spending was \$631 million, whereas by the end of its tenure in 2021, actual capital spending grew to \$1.926 billion.¹⁹¹ During the FMCB's tenure the total number of MBTA employees declined to its lowest levels in recent memory. Figure 1, below, details the budgeted and actual headcount (number of employees) of the MBTA from FY15 to FY20. The actual headcount in

¹⁸⁷ “State's budget set after final tweaks: Baker vetoes some spending for education programs” by: Joshua Miller and David Scharfenberg, Boston Globe, Jul 18, 2015 p. B1

¹⁸⁸ Note: I was the initial principal staffer to the FMCB from its start until 2017.

¹⁸⁹ Chair Joe Aiello, Monica Tibbits-Nutt, and Brian Lang served all 6 years. Other members were: Lisa Calise, Crystal Kornegay, Brian Shortsleeve, and Tim Sullivan

¹⁹⁰ “State's budget set after final tweaks” by: Joshua Miller and David Scharfenberg, Boston Globe, Jul 18, 2015, p. B1

¹⁹¹ “Capital Investment Plan Discussion” presentation to the MBTA Board of Director's Finance and Audit Committee, Jun 6, 2024 p. 30

FY18 was 5,744. For context, the headcount included in the FY24 operating budget is 7,643.

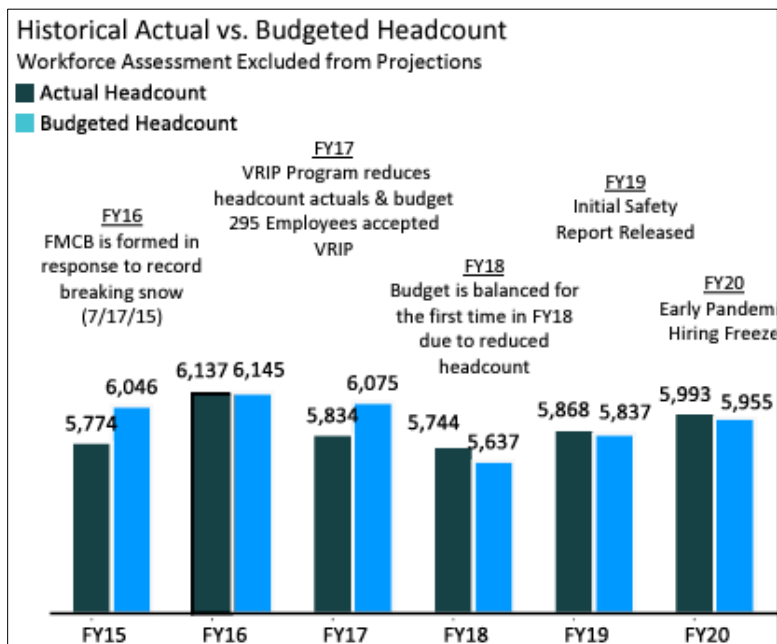


Figure 1: MBTA Headcount FY15 – FY20

Source: <https://cdn.mbta.com/sites/default/files/2024-01/FY24%20Pro%20Forma%20Presentation%20FINAL.pdf>

The Authority’s actual headcount remained below 6,000 employees until FY23. In August of 2022, the Federal Transit Administration (FTA) released a report citing a number of safety issues at the MBTA. Among the findings of this report was that the MBTA simply did not have enough employees to operate its system, stating:

“MBTA’s staffing levels are not commensurate with the demand for human resources required to carry out current rail transit operations and maintenance in addition to expanding capital program activities.”¹⁹²

-Federal Transit Administration, August 31, 2022

The FTA’s report made it clear that the MBTA’s austerity approach to running a safe public transportation system failed, and that more employees were needed.

¹⁹² Federal Transit Administration “Safety Management Inspection MBTA & DPU” Aug 31, 2022

While Stephanie Pollack served for the second longest tenure of any transportation secretary except for the 12-year term of Fred Salvucci; a revolving door of six GMs served during the Baker administration. Highway Administrator and former Acting Transportation Secretary Frank DePaola became acting GM following Scott's departure in the winter of 2015.¹⁹³ He served in this role until July 2016, when he stepped down for health reasons.¹⁹⁴ The MBTA's first ever Chief Administrative Officer, Brian Shortsleeve, became acting GM following DePaola.¹⁹⁵ Prior to joining the MBTA, Shortsleeve worked in private equity. Shortsleeve was replaced as acting GM a year later by FMCB member Steve Poftak.¹⁹⁶ Prior to joining the FMCB, Poftak worked as an administrator at Harvard, and as a research fellow for the conservative-leaning Pioneer Institute. In September 2017, Secretary Pollack hired businessman Luis Ramirez as the first permanent GM in 18 months.¹⁹⁷ Ramirez himself would not last 18 months, resigning in December 2018.¹⁹⁸ Poftak returned as GM, this time permanently, in January 2019 and served until near the end of the Baker administration in late 2022.^{199,200} Today Ramirez resides in Florida and works as an investor.

In the months prior to the start of the COVID-19 pandemic, the MBTA recorded some of the highest ridership totals in recent memory. Figure 2, below, details monthly MBTA unlinked trips from July 2018 to February 2023, and shows the major fall off in ridership at the start of the pandemic.

¹⁹³ "Commuter rail chief is replaced" by: Nicole Dungca, Boston Globe, Feb 26, 2015, p. A1

¹⁹⁴ "MBTA general manager says he has cancer, will step down" by: Nicole Dungca, Boston Globe, May 24, 2016, p. B3.

¹⁹⁵ "MBTA general manager says he has cancer, will step down" by: Nicole Dungca, Boston Globe, May 24, 2016, p. B3.

¹⁹⁶ "T control board takes pause in busy schedule" Starts & Stops by: Adam Vaccaro, Boston Globe, Jul 16, 2017, p B3

¹⁹⁷ "Ex-GE executive named MBTA general manager" by: Adam Vaccaro, Boston Globe, Aug 18, 2017, p. A1

¹⁹⁸ "T's top executive exits after 15 months" by: Adam Vaccaro, Boston Globe, Dec 12, 2018, p. A1

¹⁹⁹ "T's top executive exits after 15 months" by: Adam Vaccaro, Boston Globe, Dec 12, 2018, p. A1

²⁰⁰ "T's leader stepping down amins turmoil" by: Taylor Dolven, Boston Globe, Nov 2, 2022, p. A1

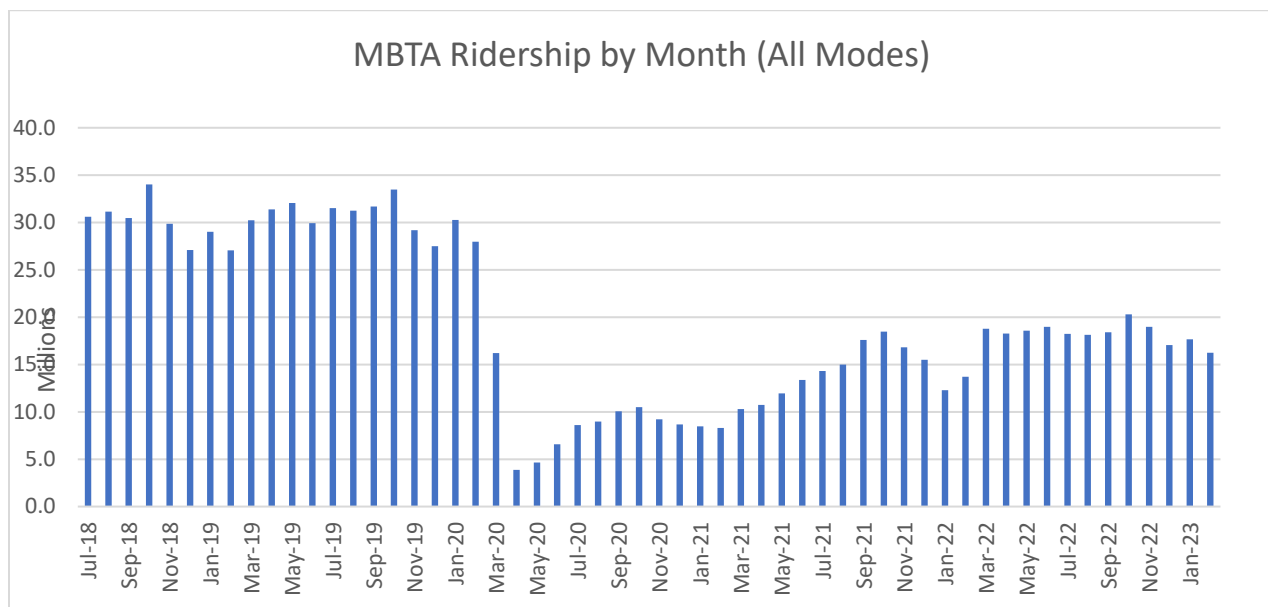


Figure 2: MBTA total unlinked ridership July 2018 to Feb. 2023. Source: MBTA Advisory Board

Systemwide ridership levels recorded in the months prior to mandatory social distancing have yet to be achieved since. The revenue losses associated with this decline in ridership placed significant pressure on the MBTA’s already shaky finances.

In late 2020, the MBTA proposed what it called “Forging Ahead”, a series of service cuts estimated to save \$142 million. These proposed service cuts are detailed by mode in Appendices 3-6 below. See the MBTA Advisory Board’s “Forging Ahead Review (December 2020)²⁰¹” for a more detailed analysis of the proposed service cuts, and the Advisory Board’s proffered alternatives to service cuts, layoffs, curtailing essential capital projects and other draconian approaches. The Forging Ahead service cuts were not implemented, and federal COVID relief funds kept the Authority financially solvent through the pandemic. As part of the Commonwealth’s FY22 budget, a new seven member MBTA Board of Directors was

²⁰¹ See: <https://mbtaadvisoryboard.org/wp-content/uploads/2021/06/12.04.20-Forging-Ahead-Review.pdf>

established, this time completely independent of the Department of Transportation. Under this legislation, the governor appointed six board members, with the seventh appointed by the MBTA Advisory Board. By statute one of the governor's six appointees must be the Secretary of Transportation, but they are precluded from serving as Board Chair.²⁰² The budget creating this new Board was signed in July 2021, and the new Board met for the first time in October 2021. In the interim, the MassDOT Board governed the MBTA under the 2009 legislation. Besty Taylor, the retired Chief Financial Officer for the Massachusetts Port Authority, and a member of the MassDOT board was the first Chair of this new MBTA Board.²⁰³ Baker did not seek reelection in 2022, and Attorney General Maura Healey was elected and sworn in January 2023. Steve Poftak resigned as GM effective January 2023, just before Healey's inauguration.²⁰⁴ Poftak returned to Harvard University as an administrator following his departure from the MBTA.

Healey Administration- 2023-Present:

Governor Healey appointed former Boston Transportation Department Commissioner Gina Fiandaca as Secretary of Transportation in January 2023 upon taking office. Shortly thereafter, Healey appointed former Long Island Railroad President Philip Eng as MBTA GM in March 2023.²⁰⁵ The next month, in April 2023, Healey requested the resignations of three of Baker's MBTA Board appointees, and appointed three Board members herself, giving her appointees a majority on the Board.²⁰⁶ As part of the FY23 Commonwealth budget, the Board of Directors was

²⁰² "Still no MBTA board, as Baker moves slower than expected" by: Taylor Dolven, Boston Globe, Sept 21, 2001 p. B1

²⁰³ "New MBTA board of directors meets for the first time" by: Taylor Dolven, Boston Globe, Oct 28, 2021, p. B3

²⁰⁴ "T's leader stepping down amid turmoil" by: Taylor Dolven, Boston Globe, Nov 2, 2022, p. A1

²⁰⁵ "New T boss promises fixes" by: Taylor Dolven & Matt Stout, Boston Globe Mar 28, 2023, p. A1

²⁰⁶ "New hires signal Healy's focus on MBTA" by: Samantha J. Gross, Boston Globe, Apr 22, 2023 p. A1

enlarged from seven to nine members with one of the new members appointed by the Mayor of Boston and the other new seat by the Governor. In September of 2023, transportation executive and former FMCB Vice Chair Monica Tibbits-Nutt replaced Gina Fiandaca as Secretary of Transportation. Today, Fiandaca works as a consultant in the private sector. (Appendix 2 lists all Massachusetts Secretaries of Transportation and their tenures).

As of late 2024, the MBTA is governed by this nine member Board of Directors and by GM Eng. In February 2024, Governor Healey appointed a 31 member Transportation Funding Task Force (TFTF) via executive order to report to her by the end of December 2024 with recommendations for “a long-term, sustainable transportation finance plan.”²⁰⁷ For the fiscal year starting July 1, 2025, the MBTA’s operating budget deficit is estimated to be above \$700 million annually, with an infrastructure maintenance deficit of at least \$3 billion annually.²⁰⁸ It is unknown where this new \$3.7 billion per year come from.

HISTORICAL LESSONS- 1918-2024:

Over the past century-plus that public transportation in Boston has operated for the public’s benefit, nine factors have emerged that, when combined in the right political context, produced periods of strong performance for the MBTA and its predecessor agencies:

1. It’s all about people! Strong leadership from Governors, Secretaries, Board Chairs, and General Managers is the most important factor to success
2. Macroeconomic factors effect public transportation acutely
3. Expansion is economic/housing development and should be funded as such
4. Austerity does not work

²⁰⁷ See Massachusetts Executive Order 626

²⁰⁸ “The path to a safe and reliable transit system just got a lot longer” Massachusetts Taxpayers Foundation, Dec 20, 2023

5. Reform without revenue is a distraction at best
6. Debt is toxic to public transportation
7. Robust, independent oversight helps, not harms the MBTA budget process
8. Profit-making and public transportation do not mix
9. Subsidizing across a larger base is preferable to a smaller base

1. It's all about people! Strong leadership from Governors, Secretaries, Board Chairs, and General Managers is the most important factor to success:

During the three Dukakis administrations, the Governor himself understood the importance of the MBTA to the economy, ecology, and way of life of the Commonwealth of Massachusetts. Dukakis appointed a strong, capable and experienced Secretary of Transportation in Fred Salvucci, and three equally strong, capable and experienced General Managers in Robert Kiley, James O'Leary and Thomas Glynn to oversee an MBTA that was resourced appropriately and staffed by professionals of long-tenure, many of whom served with pride daily to deliver public transportation to Greater Boston.

With respect to the MBTA, when comparing Dukakis's three administrations to the three administrations that succeeded it, the first Weld administration, the first Weld/Cellucci administration and the Cellucci/Swift administration, the contrasts are clear. Whereas during the 3 Dukakis administrations, a stable executive leadership seemed more focused on performance, operational efficiency and expansion, during the Weld/Cellucci/Swift administrations a more inconsistent executive leadership seemed more focused on privatization, cost cutting and the Big Dig than on T performance. Similarly, during the Romney and 1st and 2nd Patrick Administrations, unstable leadership at both the secretary and GM levels seemed more focused on implementing, or at least attempting to show results from, so-

called reforms, cost cutting and deficit management rather than on performance, operational efficiency and or customer service.

2. Macroeconomic Factors Effect Public Transportation Acutely:

Perhaps the largest change to the financial structure of public transportation in and around the Boston region came with Forward Funding in 2000. This legislation ended the “net cost of service” approach to funding the MBTA, and instead gave it a dedicated amount of funding in the form of a guaranteed percentage of all sales

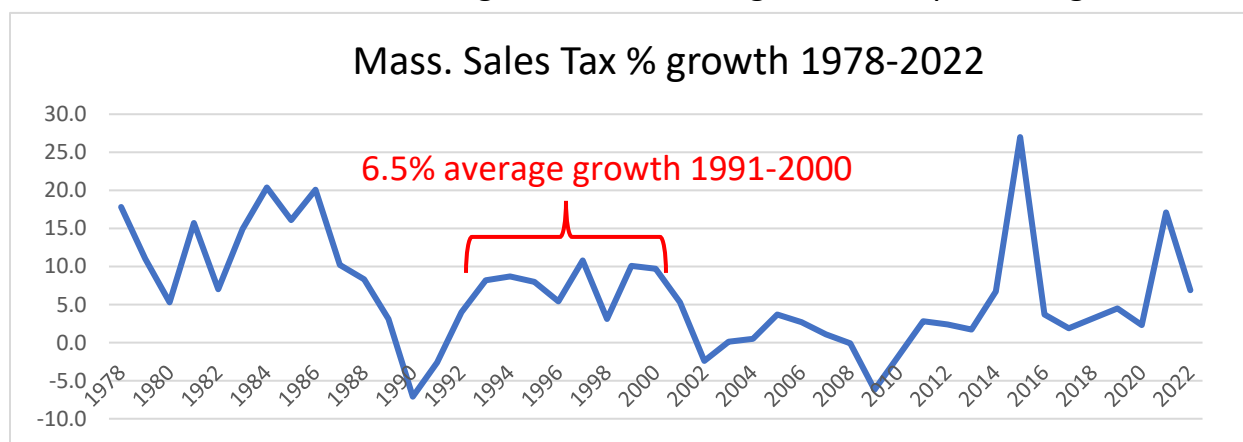


Figure 3: Massachusetts Sales Tax Percentage Growth 1978-2022

Source: MBTA Subordinated Sales Tax Bonds Variable Rate Demand Obligations 2022 Series A (10/13/22) p. 33

Note: Amendments to the Enabling Act on October 31, 2014 increased the dedicated sales tax receipts by \$160m. The percentage increase in MBTA sales tax receipts for FY15 over FY14, excluding such increase is 5%

tax revenue collected statewide.²⁰⁹ At this time, the state sales tax was among the best performing revenue sources the Commonwealth had. Throughout the 1990s Massachusetts sales tax grew at an average rate of 6.5% per year, increasing from a total amount collected in 1990 of \$1.66 billion to a 2000 total sales tax collected of \$3.11 billion.²¹⁰ By dedicating a portion of sales tax to the MBTA, lawmakers likely believed that the MBTA’s revenue issues were behind them. Indeed, in the

²⁰⁹ See “Taking the T ... To the Next Level of Progress”, MBTA Blue Ribbon Committee Report on Forward Funding, Apr 2000.

²¹⁰ “MBTA Subordinated Sales Tax Bonds Variable Rate Demand Obligations 2022 Series A” (10/13/22) p. 33

Blue Ribbon Committee Report on Forward Funding issued in April 2000, the Committee projected MBTA sales tax revenue in the year 2008 at \$791 million. In fact, the actual revenue amount was \$691 million, \$100 million less. Table 1, below details the amount of dedicated sales tax revenue projected by the Blue Ribbon Committee finance plan from 2000 compared to actual revenue realized by the Authority.

Year	Finance Plan Est.	Actual	Delta
2001	\$586	\$655	69
2002	\$663	\$639	-24
2003	\$682	\$639	-43
2004	\$703	\$642	-61
2005	\$724	\$666	-58
2006	\$746	\$684	-62
2007	\$768	\$692	-76
2008	\$791	\$691	-100

Table 1: MBTA sales tax revenue projected vs actual 2001-2008, \$ in millions

Macroeconomic changes in the ways in which Massachusetts consumers purchased goods subject to the state sales tax between 1990 and 2010 dramatically effected the MBTA's revenue. While sales tax grew at an annual average of 6.5% over the course of the 1990s, it grew only an anemic annual average of 0.3% from 2001-2010.²¹¹ This macroeconomic change resulted in

3. System expansion is economic/housing development and should be funded as such:

Since at least the Public Control Act era in 1918, the expansion of the region's public transportation system has encouraged economic development and expanded the area available for housing in car free and car light ways. While it is difficult to

²¹¹ "MBTA Subordinated Sales Tax Bonds Variable Rate Demand Obligations 2022 Series A" (10/13/22) p. 33

imagine the region without its current footprint, the system as we have it today is the product of multiple expansion projects. Since the World War I era, strategic expansions of the public transportation network have led to economic growth and increased the space available for housing.²¹² In the 1910s and 1920s, extensions of what would become the Red Line opened up large sections of South Boston and Dorchester for housing, much of which eventually became the famous three-deckers that continue to provide such dense housing to this day. In the 1930s and 1940s, what would become the Green Line was expanded to connect the streetcar lines of Beacon Street, Commonwealth Avenue, Brighton Avenue and Huntington Avenue to the subway network. In the 1950s, what would become the Blue Line was extended deeper into East Boston and Revere, opening up these areas for development, and connecting Logan Airport to the transit network. In the 1960s, the MBTA and cities and towns began to subsidize what would become sections or the entirety of the Rockport/Newburyport, Lowell, Fitchburg, Franklin, Worcester, Providence and Old Colony lines. In the 1970s, the Red Line was expanded to Quincy, and in the 1980s to Braintree and Alewife, opening up large areas of the inner South Shore, as well as West Cambridge, to the network. Also, in the 1980s the Orange Line was realigned to increase the availability of housing in Jamaica Plain, and Roxbury. With each expansion of the public transportation network, economic activity and housing opportunities also expanded.

²¹² "Changes to Transit Service in the MBTA district 1964-2024" by Jonathan Belcher, <http://roster.transithistory.org/MBTARouteHistory.pdf>

4. Austerity does not work:

The 1st and 2nd Baker Administrations might correctly be described as experiments in the effects of austerity on the MBTA. During these 8 years, the number of MBTA employees shrunk from 6,300 in July 2009,²¹³ to 5,744 in July 2018, then grew²¹⁴ to 7,083 in December 2023.²¹⁵ The reason that headcount finally surpassed its 2009 levels in 2023 was due to mandated hiring from the Federal Transit Administration. In August 2022, the FTA stated:

“MBTA’s staffing levels are not commensurate with the demand for human resources required to carry out current rail transit operations and maintenance in addition to expanding capital program activities”²¹⁶

-Federal Transit Administration, August 2022

The FTA made it clear that the MBTA’s austerity approach to running a safe public transportation system failed, and that more employees were needed. It mandated a hiring plan from the Authority, as well as increased spending on safety oversight, improved dispatching and employee training. The austerity wrought by leaders in the twenty-teens did not result in a better MBTA, but in fact the opposite.

5. Reform without revenue is a distraction at best:

The 2004 and 2009 legislative packages did not result in significant savings because there was not significant savings to be realized. Providing public transportation is labor intensive and costly, and Massachusetts historically has supported strong labor unions, living wages and good benefits. Throughout its history, the MBTA and its predecessors have provided such compensation to its largely unionized

²¹³ Final Report to the MBTA Advisory Board MBTA Fiscal Year 2010 Budget Request” MBTA Advisory Board, May 28, 2009.

²¹⁴ “2023 in Review” MBTA Workforce Management Department presentation to Planning, Workforce Development and Compensation Committee, Jan 11, 2024

²¹⁵ “2023 in Review” MBTA Workforce Management Department presentation to Planning, Workforce Development and Compensation Committee, Jan 11, 2024

²¹⁶ Federal Transit Administration “Safety Management Inspection MBTA & DPU” Aug 3, 2022

workforce. Neither the 2004 nor 2009 so-called reform legislations even tried to alter the MBTA's union contracts, which is where the bulk of any savings might have been realized. Reform before revenue has only ever resulted in reforms that do not save any real money, without the revenue needed ever appearing.

2004 Reform's Results? Minimal If Any:

It is difficult to suggest that 2004 Transportation reform was the most comprehensive and far reaching reform in decades. For the MBTA, it is difficult to suggest that this act resulted in anything positive. The creation of the Office of Transportation Planning eliminated the MBTA's Planning Department, and transferred federal 5303 funds available to transit agencies for planning purposes from the T to the state. It strains credulity to suggest that this legislation saved the MBTA any significant money, let alone tens of millions of dollars. It also seems to be quite a stretch to suggest that this legislation, which at best moved around who reports to whom, did anything positive for the MBTA, with the exception of creating the TFC.

Rhetoric Before Revenue:

As the discussion around the TFC's recommendations moved from 2007 into 2008, certain leaders began to publicly voice support for what was referred to as reform before revenue.^{217,218} This approach suggested that the agencies delivering, operating, maintaining, and building transportation infrastructure needed to shrink, merge, consolidate and generally realize savings in their existing structures before any additional funding was made available. There was a sense that those

²¹⁷ "Governor reportedly discussing merger of transport agencies" by: Noah Bierman, Boston Globe, Oct 2, 2007, p. 15.

²¹⁸ "Patrick calls timeout on gas-tax rise" by: Matt Viser, Boston Globe, Nov 21, 2008, p 29.

agencies delivering transportation were so bloated and inefficient, that if they were reformed, the need for additional revenue would either disappear or substantially shrink. For instance, a 2009 report issued by the conservative-leaning Pioneer Institute, authored by a future MBTA general manager, that reforms alone could realize \$7.3 billion over 20 years, or \$365 million per year, or \$1 million per day.²¹⁹

2009 Reform's Results? Minimal If Any:

In 2009, some politicians claimed the creation of MassDOT would save \$6.5 billion over 20 years, or about \$325 million per year on average, across all transportation agencies.²²⁰ The reality, however, was much different. As the conservative-leaning Pioneer Institute noted in 2014, "Eighteen months later, Governor Patrick downsized projected savings from \$6.5 billion to \$2 billion."²²¹ Exactly how much this 2009 law saved, if any, is unknown. In December 2010, MassDOT touted \$124 million in first year savings, although it is unclear if this is gross or net, or where these savings came from exactly.²²² Additional savings, if any, attributable to Transportation reform are currently unknown, and MassDOT stopped publishing savings scorecards after one year.²²³

2009 Reform's Governance Changes? Failed Solutions:

One major showpiece of Transportation reform and the creation of MassDOT was the creation of a single MassDOT Board of Directors with authority to oversee its 4 new divisions: Rail & Transit (i.e. MBTA and RTAs), Highway, Registry of Motor

²¹⁹ "Getting There: Transportation Reform in 2009" By: Steve Poftak, Pioneer Institute, Feb 2009.

²²⁰ Chakrabarti, Meghna "Transportation Reform Heads to Governor's Office" WBUR.org [Boston], Jun 19, 2009: See also: <https://www.wickedlocal.com/story/eagle-independent/2009/06/21/legislature-passes-transportation-reform/39270046007/> and: http://www.masslive.com/news/index.ssf/2009/06/massachusetts_turnpike_authori.html?category=Berkshires+category=Chicopee+category=Ludlow+category=Palmer+category=Springfield+category=Statehouse+category=Westfield+category=Wilbraham

²²¹ "MassDOT's Cost Savings Dead End" Pioneer Institute Jan 28, 2014, <https://pioneerinstitute.org/news/17009>.

²²² Moskowitz, Eric "Stops & Starts" Boston Sunday Globe, Dec 10, 1010 page B4

²²³ <https://pioneerinstitute.org/wp-content/uploads/Scorecard-request1.pdf>

Vehicles and Aeronautics (i.e. everything aviation in the Commonwealth except MassPort). This Board met monthly for 6 years and its members worked diligently and doggedly to oversee the MBTA, Rail and Transit Division, Highway Department, former Turnpike assets and debts, certain assets formerly controlled by the Department of Conservation and Recreation, the Registry of Motor Vehicles, the Aeronautics Division, and the new departments under the Secretary's jurisdiction. Ultimately, however, this governance structure failed the MBTA in its oversight and management duties. In 2015, new Governor Charlie Baker's Special Panel to Review the MBTA's first recommendation was to remove the MBTA from MassDOT's oversight, and establish a new Fiscal and Management Control Board (FMCB) as the new governing authority for the MBTA.²²⁴ In October 2021, the new MBTA Board of Directors permanently took over the MBTA from MassDOT.²²⁵

2009 Reform's Efficiencies or Lack Thereof:

For the MBTA, the 2009 so-called reform also suggested significant savings from the merger of back-office and administrative tasks. The notion that the MBTA and the Commonwealth's human resources offices, for instance, could ever merge together was always false. MBTA employees are not state employees and, in many cases, MBTA labor contracts require specific employment conditions and policies between the Authority its employees. Public transit employee protections, and the requirement to collectively bargain for changes to such protections are protected by federal law, and not subject to state oversight.²²⁶ MBTA bus drivers were never going to become MassDOT bus drivers, nor accept any wages and benefits less than

²²⁴ <https://cdn.mbtta.com/sites/default/files/2017-10/back-on-track-action-plan-040815.pdf>

²²⁵ New MBTA board of directors meets for the first time" by" Taylor Dolven, Boston Globe, Oct 28, 2001, p. B3

²²⁶ See: <https://www.dol.gov/agencies/olms/compliance-assistance/mass-transit-employee-protections>

what the Carmen's Union collectively bargained for. Just as federal law protected the employees of the BERY from dramatic changes by the MTA, and those of the MTA, from dramatic changes by the MBTA, MBTA employees retained their collectively bargained-for wages and benefits under MassDOT.

The MassDOT merger did create several so-called shared services in areas like IT, HR, Legal, Diversity, and performance monitoring. As of February 2024, the MBTA's IT department consists of 106 employees and costs over \$12 million in annual wages. Its HR department consists of 92 employees with a wage bill of over \$8.6 million annually. In Legal there are 36 employees costing \$4.2 million; Diversity & Civil Rights 17 employees and \$1.5 million in costs; and performance monitoring consists of 9 employees costing the MBTA over \$970,000. One would think that 15 years later, most if not all of these administrative positions would have moved to MassDOT and to what are generally lower-paid state salaries compared to the MBTA. Other administrative departments like budget, capital programs, customer experience, environmental oversight, labor relations, occupational health, police, procurement, real estate management, security, ADA accessibility, treasurer services, and vendor management never even tried to merge with their MassDOT counterparts because ultimately, they were incompatible. The issue never was the duplication of effort by different but similar entities within different agencies. Ultimately Transportation reform tried to solve a problem that never existed, and in doing so, unfortunately added a level of management and bureaucracy to transportation operations in Massachusetts.

MASSDOT 15 Years Later:

In 2024, MassDOT is 15 years old. 15 years later, the MBTA's finances remain a mess, with the Authority facing a \$700 million fiscal cliff starting July 1, 2025. If the politicians in 2009 were correct, and the creation of MassDOT and the so-called reforms actually saved \$6.5 billion over 20 years (\$325 million per year every year for 20 years), then in theory \$4.8 billion dollars' worth of savings should have been realized by year 15, and certainly some of those funds would have gone to assisting the MBTA's structural deficits. But transportation reform and the creation of MassDOT did not result in any unique, additional funds for the MBTA. The 2009 sales tax increase and 2014 gas tax increases were separate from the so-called reform, and the MBTA has always maintained its own borrowing authority and credit. MassDOT's Board did, however, oversee 2 fare increases in 2012 and 2014. Transportation reform's signature governance structure has been dismantled, and the Secretary of Transportation no longer chairs the MBTA Board. In addition, the MBTA cannot plan for its own future, and its decision making now includes a new level of bureaucracy, sometimes reaching to the Governor's office. Additionally, MBTA leadership has been anything but consistent, with 10 individuals serving as general manager on 12 separate occasions in the 15 years since the 2009 Transportation reform.

6. Debt is toxic to transportation agencies:

Building and maintaining infrastructure is expensive and capital intensive. One of the reasons that the BERY came under public control in 1918 was because of its difficulties paying its operating costs, servicing its capital needs, and paying dividends to shareholders all from fare revenues. The MTA absorbed substantial

debts from the BERY when it took over in 1947, and consistently had trouble paying down these debts throughout its 17 year existence. Since 2000, the MBTA's needs to support large debt service costs contributed to a large number of fare increases and ongoing financial challenges. Historically, no agency has proved capable to servicing large debt loads while also offering quality service and maintaining its infrastructure. If the Commonwealth is serious in 2024/2025 about fixing the MBTA's financial challenges, debt relief must be part of the solution, and future expansion must be treated as economic development projects, housing expansion, or some other non-transportation related matter. The fact is that neither the MBTA, nor the MTA, nor the BERY, nor the BERY's multitude of private predecessors could afford the large debt burdens they inherited from their forbears.

Legacy Debts:

This Forward Funding Finance Plan was flawed on its face, especially in its recommendation to stop issuing debt. It makes sense why those drafting the finance plan urged the Authority to stop issuing debt. Between 1964 and 2000, the MBTA issued \$3.3 billion worth of bonds, backed by the full faith and credit of the Commonwealth. Over 36 years, these bonds helped purchase new bus fleets, expand the reach of commuter rail, extend the red line from Harvard to Alewife and Columbia Junction to Braintree, depress the Orange Line, and fund major overhauls and refurbishments of MBTA infrastructure. Prior to Forward Funding, if the Authority lacked the funds to pay its debt service costs (principal and interest), these costs were passed on to the Commonwealth which paid them as part of the net cost of service model. Under its new model, the MBTA became responsible for paying all of its expenses itself, based principally on the sales tax. As stated above,

while sales tax grew at an annual average of 6.5% over the course of the 1990s, it grew only an anemic annual average of 0.3% from 2001-2010.²²⁷ Of course there was no way for Forward Funding Finance plan authors to know sales tax growth would falter at the time they drafted their report.

Big Dig Debt:

Under Forward Funding the MBTA was also made responsible for \$1.7 billion in Big Dig transit mitigation project debts. In December 1990, in the waning days of the Dukakis administration, the Commonwealth and Conservation Law Foundation entered into legally binding agreements that committed the State and MBTA to build additional transit projects in return for the end of lawsuits looking to cease the building of the big dig.²²⁸ At the time, prior to Forward Funding, under the net cost of service model, if the MBTA could not afford the cost of the principal and interest on these projects, the state picked up the costs. The cost of these projects paid by the MBTA from inception to completion is estimated at \$8.03 billion in principal and interest.²²⁹

Crippling Debt Service:

As “Born Broke” noted, in 2001 when the MBTA was recreated in its post-Forward Funding form, it owed \$3.3 in prior obligation debt, \$1.7 in Big Dig permitting debt, and \$1.85 billion in necessary maintenance/infrastructure debts for a total of \$6.85 billion in debt. Despite paying hundreds of millions annually in debt service for principal and interest, by 2007 the Authority’s total debt grew to \$8.1 billion.²³⁰ The cost of servicing this debt also grew throughout the first decade of this century,

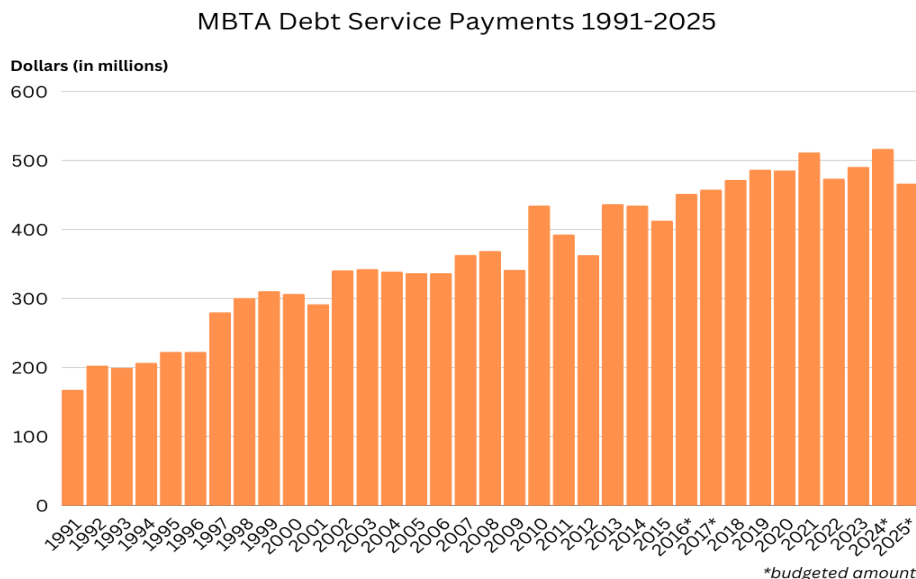
²²⁷ “MBTA Subordinated Sales Tax Bonds Variable Rate Demand Obligations 2022 Series A” (10/13/22) p. 33

²²⁸ “Artery environmental plan set” by: Larry Tye, Boston Globe, Dec 19, 1990, p. 1

²²⁹ “MBTA: A History of Funding” presentation to BOD 1/25/24

²³⁰ “Transportation Finance in Massachusetts: An Unsustainable System” Vol 1, Transportation Finance Commission, Mar 2007, p. 9.

from \$291.5 million in FY2001 to \$445.3 million in FY2010.²³¹ In FY2024, the MBTA budgeted \$516.9 million for debt service.²³² The chart below details the growth in debt service expenses incurred by the MBTA since 1991.



Source: Transportation Finance Commission Report, Volume 1: March 28 2007 (1991-2006). MBTA Advisory Board reports 2007-2025

7. Robust, independent oversight helps not harms the processes:

Checks and balances are at the heart of American democracy, and no individual of authority can or should have unchecked authority over the citizenry without redress. The need for counterbalancing robust, independent, and apolitical research, thought, and respectful criticism is important in our system of government, especially in the realm of public policy and even more so in the area of public transportation. Balancing the needs of riders, the system itself, and political masters is not easy, and boards or trustees can become beholden to one or more constituencies causing them to act in way out of balance. In these times,

²³¹ <https://cdn.mbta.com/sites/default/files/2017-10/fy10-sore-history-2001-2010.pdf>

²³² "MBTA FY 2024 Operating Budget Oversight Report" by the MBTA Advisory Board, May 16, 2023.

counterbalancing entities such as the Metropolitan Transportation Council, MTA Advisory Board and later the MBTA Advisory Board historically and currently offer such balance. For instance, a Boston Globe op/ed from June 1962 stated:

“In light of recent trouble, [the Metropolitan Transit Authority] should be removed as far as possible from state politics by giving the M.T.A. Advisory Board the major voice in naming trustees”²³³
-Boston Globe Editorial, June 28, 1962

Then, as now, the need for an entity not reliant upon the executive branch for its position or sustenance was needed to offer respectful criticism of policies that may have had short-term political popularity, but not necessarily be best in the long-term for riders or other constituencies.

A second example showing the importance of independent oversight is the effect caused by the MBTA Advisory Board’s refusals to approve supplemental budgets in the 1970s and early 1980s. Such an action led, in 1973, to the state directly subsidizing 50% of the MBTA’s deficits for the first time, which in 1974 was made permanent following similar Advisory Board action the next year. By the late 1970s, short-term political gain via patronage, state house interference, fraud, theft and other nefarious actions by some of those appointed by Governor Ed King led not just to a major exposé in the region’s largest newspaper,²³⁴ but also the virtual bankrupting of the MBTA, wherein King took emergency powers to overrule the Advisory Board and approve additional spending. It was only the MBTA Advisory Board’s determination the following year to avoid a repeat that led it to refuse a \$140 million supplemental budget request in 1980, precipitating the closure of the

²³³ “The Fast Shuffle” Boston Globe op/ed, Jun 28, 1962, p. 14

²³⁴ See Boston Globe “Spotlight” stories Dec 16-25, 1979.

Authority for a day and the emergency legislative session that approved the much vaunted management rights legislation.²³⁵ Unfortunately, with the passage of the 2009 so-called reform legislation, the Advisory Board's authority to veto spending was abolished, making the body purely advisory only. It is challenging to see how the MBTA is better without it.

8. Profit-making and public transportation rarely mix well:

The BERY failed as a private entity because the automobile ended the monopoly on rapid transit enjoyed prior to its widespread adoption and it became financially impossible for the privately-held railway to earn enough from fares to pay for its day-to-day operations, fund maintenance and expansion and pay dividends to shareholders. However, by 1918, the importance of the public transportation system to the region was evident. Rather than see public transportation fail, the Public Control Act firmly placed the future of public transportation in the public's control.

The failure of commuter railroads as private, profit-making entities offers another example. Just as with the BERY and the automobile, investor-owned railroads could not compete as the jet airplane, and subsidized highway system eroded their monopoly on medium-to-long range travel. The decline in fare-paying passengers made it clear that the revenue needed to operate day-to-day, fund expansions plus maintenance, and pay dividends to investors was insufficient. As private railroads lost money, they began raising fares, cutting service and abandoning routes, which led to more ridership losses. However, just as with the BERY in 1918, leaders in the

²³⁵ MBTA Service Shuts Down; State Legislature Deadlocked" by: I. Joseph Garcia and William E. McKibben, The Harvard Crimson, Dec 6, 1980.

Commonwealth realized that the loss of commuter rail in and around the Boston region did not offer the best long-term options for the people of eastern Massachusetts. After experimenting with individual cities and towns subsidizing routes and stops at their stations, the Legislature, with the MBTA Act of 1964, expanded the size of the service district, and began directly subsidizing commuter rail via the new MBTA.

It should be noted that attempts were made to privatize all or some aspects of bus operations or maintenance in 1993,²³⁶ 1995,²³⁷ 1997²³⁸ and 2015.²³⁹ None were successful, although the Authority has contracted out certain operations during this period such as real estate management,²⁴⁰ money counting,²⁴¹ and other administrative activities.

9. It's better to subsidize across a wide base compared to a smaller base:
The BERY and MTA each relied on the payment of their deficits by the 14 cities and towns that had hosted streetcar service in 1918. In 1929, the Commonwealth allowed these communities to formally come together via the Metropolitan Transit Council (MTC) to provide oversight and direction to the BERY's trustees. While limited to the original 14 communities, the MTC allowed communities to coordinate their actions to reduce annual deficits that would ultimately be passed along to the taxpayers of those 14 communities.

²³⁶ "T workers wary about privatizing of routes" by: Thomas C. Palmer, Jr. and Alysia Tate, Boston Globe, Jun 16, 1993, p. 29

²³⁷ "House vote a blow to T managers" by: Frank Phillips, Boston Globe, Nov 9, 1995, p. 40

²³⁸ "T officials her privatization plan" Boston Globe, Jan 24, 1997 p. 39

²³⁹ "State budget shakes unions" by: David Scharfenberg", Boston Globe, Jul 9, 2015

²⁴⁰ "Privatization seen failing MBTA test" by Robert A. Jordan, Boston Globe, Sept 14, 1999

²⁴¹ "Workers protest MBTA vote" by: Matt Rocheleau and Laura Grimaldi, Boston Globe, Oct 7, 2016, p. B3

By the mid-1960s, it was clear that this model was not functioning as designed. The failure of private railroads, and the desire to continue their operation as an alternative to driving, led to the creation of the MBTA, which consisted of 78 cities and towns-the original 14 streetcar communities, and 64 new communities that hosted a train station. While this expansion of the district did expand the base responsible for covering MBTA deficits, troubles emerged. By the early 1970s, the divide between those communities that hosted subway service, principally Boston, and those did not host subways, led to friction between the cities and towns responsible for the Authority's deficits.

By the time of Forward Funding, the need to further expand the base of cities and towns supporting the MBTA was clear. The Forward Funding legislation expanded the MBTA service district to 175 communities (further increased to 178 over the years). Forward Funding also ended the practice of cities and towns paying MBTA deficits in arrears, and instead switched it to paying municipal assessments to the MBTA in advance. Forward Funding, however, also expanded the base of communities that subsidizes the MBTA to all cities and towns statewide, via the dedication of a portion of the sales tax to the Authority. This expanded the base for subsidizing the Boston region's public transportation system to the entire Commonwealth.

CONCLUSION:

Since at least 1918, multiple legislative interventions have attempted to solve the ongoing issue that public transportation in the Boston area is expensive and essential. Despite numerous efforts, the MBTA at the end of 2024 needs at least

\$3.7 billion in additional new revenue annually to continue operating in its current footprint, and safely maintain its infrastructure.

In examining the history of how public transportation has been governed, funded and overseen in greater Boston for the past 106 years, in addition to the nine lessons described above, one other is paramount- the original sin of public transportation in Boston is debt, or more specifically a lack of debt relief. In 1918, when the Commonwealth essentially leased the BERY from its private owners, it inherited the railway's debts along with its infrastructure, forcing the BERY to pay fixed charges for the next twenty-nine years. When the BERY was succeeded by the MTA in 1947, it's the BERY's debts were inherited as well, which hampered its ability to deliver public transportation to the people of the Boston region for the next seventeen years. Huge debts were also passed along to the MBTA in 1964, and to it again in 2000 with Forward Funding. For fiscal year 2025 debt principal and interest will consume 23% of the MBTA's \$2.5 billion operating budget. Perhaps the simplest and quickest way to solve the Authority's underlying structural and cyclical deficits repent for public transportation's original sin, and relieve it of its crippling debts.

Fixing the T will not be easy, or cheap, but if we can get the combination of people, money, governance, and oversight right it can improve dramatically. In 2009, when the original *Born Broke* was written, a political window of opportunity opened for all of those who cared to finally fix the MBTA's governance, funding, and oversight for good. That obviously did not happen. Heading into 2025, when the MBTA has a strong General Manager, and a solid Board of Directors, perhaps this time we can

get the funding and oversight pieces correct? History shows us what works and what does not work. The question is, can we get it right this time?

APPENDIX 1: BERY/ MTA / MBTA GENERAL MANAGERS- 1918-PRESENT

	Name	Start	End	Tenure (Years)
1918-1958	Edward Dana	8/7/1919	7/30/1959	40.6
	Willis B. Downey*	8/1/1959	5/30/1960	0.8
1960's	Thomas J. McLernon	6/1/1960	1/31/1965	4.7
	MG Rush B. Lincoln, Jr.	2/1/1965	10/31/1967	2.8
	Leo J. Cusick	11/1/1967	5/30/1970	2.6
1970's	Joseph Kelly	6/1/1970	7/18/1975	5.2
	Bob Kiley	5/19/1975	1/28/1979	3.8
1980's	Robert Foster	1/29/1979	6/9/1980	1.4
	Barry Locke*	6/10/1980	3/31/1981	0.8
	James F. O'Leary	4/1/1981	3/30/1989	8.1
1990's	Thomas Glynn III	3/20/1989	4/5/1991	2.1
	James Rooney*	5/1/1991	9/16/1991	0.4
	John Haley, Jr.	11/1/1991	4/5/1995	3.5
	Robert L. Mabardy*	4/6/1995	9/8/1995	0.4
	Patrick Moynihan	9/8/1995	6/30/1997	1.8
2000's	Robert Prince	6/4/1997	12/1/2001	4.6
	Michael Mulhern	12/2/2001	5/15/2005	3.5
	Daniel Grabauskas	5/16/2005	8/9/2009	4.3
2010's	William Mitchell*	8/7/2009	2/28/2010	0.6
	Richard Davey	4/1/2010	9/1/2011	1.4
	Jonathan Davis*	9/2/2011	12/17/2012	1.3
	Beverly Scott	12/1/2012	3/3/2015	2.3
	Frank DePaola*	3/4/2015	6/30/2016	1.3
	Brian Shortsleeve*	7/1/2016	6/30/2017	1.0
	Steve Poftak*	7/1/2017	8/30/2017	0.2
	Luis Ramirez	9/12/2017	12/10/2018	1.3
	Jeff Gonneville	12/11/2018	12/31/2018	0.1
2020's	Steve Poftak	1/1/2019	1/3/2023	4.1
	Jeff Gonneville*	1/4/2023	4/9/2023	0.3
	Philip Eng	4/10/2023		

* Acting

APPENDIX 2: MASSACHUSETTS SECRETARIES OF TRANSPORTATION- 1971-PRESENT

Decade	Name	Start	End	Tenure (Years)
1970's	Alan Altschuler	6/25/1971	1/2/1975	3.6
	Fred Salvucci	1/3/1975	1/5/1979	4.1
1980's	Barry Locke	1/4/1979	6/9/1980	1.5
	James O'Leary*	6/10/1980	3/31/1981	0.8
	Barry Locke	4/1/1981	5/2/1981	0.1
	James F. Carlin	5/2/1981	1/5/1983	1.7
	Fred Salvucci	1/6/1983	1/2/1991	8.1
1990's	Richard Taylor	1/3/1991	11/30/1992	1.9
	James Kerasiotes	12/1/1992	6/30/1997	4.6
	Patrick Moynihan	7/1/1997	1/2/1999	1.5
	Hon. Kevin Sullivan	1/2/1999	2/4/2002	3.1
2000's	James Scanlon	2/4/2002	1/2/2003	0.9
	Daniel Grabauskas	1/3/2003	3/30/2005	2.3
	John S. Ziemba*	4/1/2005	5/1/2005	0.1
	John Cogliano	5/2/2005	1/3/2007	1.7
	Bernard Cohen	1/4/2007	1/2/2009	2.0
	Jeffrey Mullan*	1/3/2009	1/11/2009	0.0
	James Aloisi	1/2/2009	9/11/2009	0.7
	Jeffrey Mullan	9/12/2009	9/1/2011	2.0
2010's	Richard Davey	9/2/2011	10/31/2014	3.2
	Frank DePaola*	11/1/2014	1/30/2015	0.3
	Stephanie Pollack	1/31/2015	1/22/2021	6.1
	Jamey Tesler	1/23/2021	1/29/2023	2.0
2020's	Gina Fiandaca	1/30/2023	9/11/2023	0.6
	Monica Tibbits-Nutt	9/12/2023		

* Acting

APPENDIX 3: BUS ROUTES PROPOSED FOR CONSOLIDATION UNDER FORGING AHEAD

Routes	Municipalities	Description	Change
62 + 76	Cambridge, Arlington, Belmont, Lexington, Bedford, Lincoln	Bedford VA – Alewife via Hanscom Airport	76 suspended. Selected trips omit Hanscom
84 + 78	Cambridge, Arlington, Belmont	Arlmont Village - Harvard	84 suspended, Alewife omitted
88 + 90	Cambridge, Somerville, Boston, Medford	Davis Station – Assembly Row	88 suspended, 90 ends at Assembly
214 + 216	Quincy	Houghs Neck- Quincy Center	Routes combined; headways reduced
352 + 354	Boston, Woburn, Burlington	Woburn – Downtown (Express)	352 suspended. 354 runs North Burlington - Downtown
501 + 503	Boston, Newton	Brighton Center - Downtown	503 suspended. 501 ends at Copley Square
502 + 504	Boston, Newton, Watertown	Watertown Yard - Downtown	502 suspended. 504 ends at Franklin & Federal Streets.

APPENDIX 4: BUS ROUTES PROPOSED FOR TRUNCATION UNDER FORGING AHEAD

Route	Municipalities	Description	Change
230	Quincy, Braintree, Holbrook, Brockton	Montello Station to Quincy Center	End at Braintree Sta. Eliminate local service thru East Braintree and Quincy
553	Boston, Newton, Waltham	Roberts – Federal & Franklin Streets	Ends at Newton Corner, no downtown BOS service
554	Boston, Newton, Waltham, Belmont	Waverly Square – Federal & Franklin Streets	Ends at Newton Corner, no downtown Boston service
556	Boston, Newton, Waltham	Waltham Highlands – Federal & Franklin Streets.	Ends at Newton Corner, no downtown Boston service
558	Boston, Newton, Waltham	Riverside Station – Federal & Franklin Streets	Ends at Newton Corner, no downtown Boston service

APPENDIX 5: BUS ROUTES PROPOSED FOR ELIMINATION UNDER FORGING AHEAD

RTE	Municipalities	Description	Rationale
18	Boston	Ashmont Station – Andrew Station	Redundant
43	Boston	Ruggles Station – Park St. Station	¼ mile of transit
52	Dedham, Boston, Newton, Watertown	Dedham Mall – Watertown Yard	Low transit critical ridership
55	Boston	Jersey/Queensbury Streets – Copley Station	¼ mile of transit
68	Cambridge	Harvard Station – Kendall/MIT	¼ mile of transit
72	Cambridge	Aberdeen Ave – Harvard Station	Low transit critical ridership
79	Arlington, Cambridge	Arlington Heights – Alewife Station	Low transit critical ridership
80	Arlington, Medford, Cambridge, Somerville	Arlington Center. – Lechmere	Low transit critical ridership
131	Malden, Melrose	Melrose Highlands – Oak Grove or Malden Center	Low transit critical ridership
136	Malden, Melrose, Wakefield, Reading	Reading Depot–Malden Center	Low transit critical ridership
170	Boston, Waltham	Waltham Center. - Nubian Station	Redundant
212	Quincy	Quincy Center – N. Quincy Station	Low transit critical ridership
221	Quincy	Fort Point – Quincy Center	Redundant
325	Medford, Boston	Elm St, Medford - Haymarket	¼ mile of transit
351	Bedford, Burlington, Lexington	Bedford Woods Dr. – Alewife	Low transit critical ridership
428	Wakefield, Saugus, Malden, Revere, Chelsea, Boston	Oaklandvale – Haymarket Station	Redundant
434	Peabody, Lynn, Revere, Boston	Main St Peabody - Haymarket	Redundant
451	Beverly, Salem	North Beverly Sta – Salem Depot	Redundant
505	Waltham, Newton, Boston	Waltham Ctr. – Federal & Franklin Streets	Low transit critical ridership
710	Malden, Medford	North Medford – Wellington Station	Low transit critical ridership
714	Hingham, Hull	Pemberton Point Hull – Hingham Station	Low transit critical ridership
716	Canton, Milton, Boston	Cobbs Corner – Mattapan Station	Redundant

APPENDIX 6: RIDE SERVICE AREA PROPOSED CHANGES UNDER FORGING AHEAD

