MARYLAND DEPARTMENT OF TRANSPORTATION
MARYLAND TRANSIT ADMINISTRATION

Draft Final Report:

Maryland Intercity Bus Study Update

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Chapter 1: Maryland's Intercity Bus Program

Introduction

This study is intended to update the initial 2010 Maryland Transit Administration intercity bus study to reflect changes in the federal Section 5311(f) program, the intercity bus industry, and the experience gained from several years of MDOT MTA funding of two rural intercity bus routes.

The study includes an overview of the Federal Transit Administration (FTA) Section 5311(f) rural intercity bus program and the MDOT MTA implementation of the program (Chapter 1). Chapter 2 compares Maryland's program to the intercity bus programs in other states. There is an inventory of current intercity bus services that includes all services, not just those funded by MDOT MTA (Chapter 3). It also includes information about the changes in those services resulting from the reduction in travel due to the COVID-19 pandemic, so there is information about the level of service before the pandemic and as it currently exists. In Chapter 4 the coverage provided by this network is compared to the location of concentrations of persons with a higher potential need for public transportation, including intercity bus service—which is one way of identifying unmet needs. Another means of identifying unmet needs is through stakeholder input, and Chapter 5 presents the perspective provided by the state's regional planning agencies, rural public transit operators, and the intercity bus carriers. Finally, Chapter 6 pulls this review together to present a strategy for the short-term (next two years), and also a vision of the type of intercity bus network that could more fully address the needs identified in the study if funding were to become available.

The impact of the pandemic on travel has been substantial, with intercity bus ridership dropping to 20 percent or less of pre-COVID levels. There has been some recovery of ridership (and revenue), but it is not clear what the outcomes may be—whether there are longer-term changes in the pattern of demand, and how the carriers will survive and adapt. This could include changes in their operating costs as well as the potential changes in revenue from changes in demand. For these reasons it has been difficult to propose a definitive plan with a budget, instead following a strategy of updating the grant application and allowing the carriers to respond to the state's priorities for continued intercity bus coverage.

About Section 5311(f) – Background

FTA program guidance for the rural intercity bus program is provided in (FTA) Circular 9040.1G (49 U.S.C. 5311 – Formula Grants for Other Than Urbanized Areas), Chapter VIII, Intercity Bus. Section 5311(f) states that fifteen percent of each state's overall Section 5311 funding allocation must be spent on rural

intercity bus projects under Section 5311(f) unless the state certifies to the FTA that there are no unmet rural intercity needs, and that it has determined that there are no needs as the result of a consultation process that includes outreach to the intercity carriers and other stakeholders. Maryland has utilized this funding to support intercity bus services connecting rural areas to the national network and to major activity centers and has not (recently) certified that there are no unmet needs.

The circular defines intercity bus service as "regularly scheduled bus service for the general public operating with limited stops over fixed routes connecting two or more urban areas not in close proximity, which has the capacity for transporting baggage carried by passengers, and which makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available." Package express service may also be included if incidental to passenger transportation.

The national objectives as prescribed by the FTA in the circular are as follows:

1. To support meaningful connections between non-urbanized areas and the regional or national system of intercity bus service,
2. To support services to meet the intercity needs of residents in non-urbanized areas and,
3. To support the infrastructure of the intercity bus network through planning, marketing assistance, and capital investment in facilities and equipment.

The definition of eligible intercity bus services under this program includes services that are:

1. Open to the general public, and
2. Fixed route, fixed schedule (unless they are "feeder services"), and
3. Operated between two or more urban areas (2,500 persons is the Census definition of urban) over long distances, and
4. Capable of carrying baggage, and
5. Providing a meaningful connection (in terms of coordinated stop locations, schedules, and information) to the national system of intercity bus transportation.

Commuter bus service is not eligible under this program. Also, charter and tour services are not eligible under this program. Intercity service is not defined by the type of vehicle used (except for the requirement to carry baggage). All vehicles used to provide services under this program must be fully ADA compliant.

Maryland's Section 5311(f) Program

MDOT MTA is the recipient of FTA Section 5311 and 5311(f) funding for the state, and so is responsible for implementing the Section 5311(f) program. Guidance regarding the program is provided in three documents: the Section 5311 State Management Plan, the Locally Operated Transit Systems (LOTS) Manual; and in the Intercity Bus Program Application. The Maryland Section 5311(f) fifteen percent set-aside for FY 2021 is $ 964,738.

Grant Program - Not a Contract for Service

The Maryland program is administered as a grant program, with a grant solicitation that is separate and distinct from the Annual Transportation Plan application utilized by the LOTS for other programs. The application is issued every other year, as the grant period covers two state fiscal years. The most recent application provided funding for the period from July 1, 2020 to June 30, 2022. The application provides information about the currently funded intercity bus services and the FTA guidance (including National Program Objectives). This contrasts with the approach MDOT MTA takes with the commuter bus program. For that program MDOT MTA issues RFPs for specific services, selects an operator from among the competitive bidders, and contracts with that firm to provide the service (using its own vehicles and drivers). A number of other states use the contract approach in which the operators are third-party contractors.

Maryland State Priorities

State priorities are identified as the Maryland "Program Emphasis"—which includes operating assistance for intercity routes connecting non-urbanized areas to the regional or national system of intercity bus service, operating assistance for existing routes at risk of being discontinued, operating assistance for new routes if they address previously unserved areas of high need, capital assistance for vehicles for use on the Section 5311(f) funded service, capital assistance for facilities, accessibility equipment, etc., and funding for marketing.

Unlike most state transit grant programs, the Maryland program application identifies "Priority Corridors":

- Morgantown, West Virginia/Grantsville, Maryland to Baltimore (via I-68 and I-70)—though service to Washington, D.C. would also be considered.
- Ocean City to Baltimore via US-50.
- Elkton to Baltimore via US-40 and connecting rural portions of Cecil County.

These were identified in the 2010 MDOT MTA intercity bus plan study. A minimum frequency of one roundtrip per day is specified, and there is a requirement that all services connect with the "national intercity transit network" (which is not defined any further). Although the application specifies these priority corridors, it is also open in that an applicant may submit projects in other corridors, although the proposed projects must be supported by documentation identifying the unmet need and providing justification for the service.

The application also provides an option for applicants to apply for funding for "feeder services" to intercity bus routes. These might be rural routes of **at least 35 miles in length** that make a "meaningful connection" to scheduled intercity bus service. The Maryland application incorporates the FTA guidance from the circular about feeder services permitting them to be demand responsive and operate less than daily and provide access to rail passenger and air service. Rural transit operators providing feeder service that cross state lines are required to meet Federal Motor Carrier Safety Administration (FMCSA)

requirements. A later section of the Maryland application does address the need to meet FMCSA requirements if services are interlined with an interstate carrier, even if the feeder service is completely intrastate.

Connectivity and Coordination

There is a requirement for applications to demonstrate local support and connectivity with other transit providers and modes. This includes supportive information about efforts to coordinate services with other local and regional transportation providers—including letters of local support.

Program Eligibility

Program eligibility under the Maryland program includes private for-profit intercity carriers, private non-profit operators, local public transit operators (but only for feeder service), or a public body proposing to provide intercity bus service. To date all applicants and grant recipients have been private for-profit providers. Perhaps this is in part due to the fact that the state requires all carriers providing service or interlining to have appropriate authority from the FMCSA, including display of a USDOT or Maryland DOT motor carrier identification number on all vehicles with a capacity of eleven or more. Minimum insurance requirements from FMCSA are identified by reference though not spelled out in detail.

Compliance and Vehicle Requirements

Vehicles used are required to be accessible to individuals with disabilities under 49 CFR Part 37, and vehicles purchased through the program are required to be accessible as defined in 49 CFR Part 38. Though there is language requiring that an applicant applying for vehicle capital must have additional accessible vehicles available within 48 hours (presumably as backup) that may lead to the perception that a 48-hour advance reservation requirement is permissible though it is not.

The application spells out the need for applicable Drug and Alcohol policies and procedures based on either FTA or FMCSA requirements, whichever is appropriate for that applicant.

The applicants/recipients are required to meet all Section 5311 requirements of the program, as identified in the LOTS manual. All Certifications and Assurances are required as part of the application. In addition, there are state defined reporting requirements that support the state's role in completing the Rural National Transit Database (NTD) as required by FTA. Maryland's program is managed as one element of the state's overall LOTS program, as one program overseen by a regional planner in the OLTS office. Compliance oversight is provided by MTA through periodic FTA/MDOT state program compliance reviews of grant recipients, including the private providers under this program.

Use of In-Kind Match

In the project application provision is made for the applicant to utilize the Section 5311(f) In-Kind match provisions in the FTA program, allowing for the value of connecting unsubsidized intercity bus service to be used as the fifty percent non-federal share required for operating projects. Applicants are directed to contact Greyhound's state and local affairs representatives for more information, though potentially other carriers could provide this in-kind match. A form is provided to identify the unsubsidized route segment and calculate its value for the required match, which is described in counterpart form for the segment to be subsidized. Since the 2010 study changes in federal statute have allowed 100 percent of the value of the connecting unsubsidized service to be counted as match. Previously FTA capped the value at 50 percent of the value of the connecting service.

Capital Projects under the MDOT-MTA Program

Under the MDOT MTA program, facility and other capital projects require a twenty percent local cash match—it is not clear if vehicles must have a similar match. Vehicles funded under the program are not allowed to leave the state for more than 24 hours. Marketing projects are eligible and must be described in detail. The basis of the contract grant amount is a line item budget reflecting expense items and revenues by source for the project routes (rather than a single per-mile cost). Reporting reflects the resulting operating deficit eligible for funding. As noted above the monthly reimbursement request also includes required reporting on services provided and ridership, including calculated performance measures.

Summary

The Maryland program has been operating largely as originally defined in the 2010 study, as a competitive grant program funding service in the two corridors identified as priorities. It has taken full advantage of the in-kind match opportunity for operating projects, with no state funding provided for match. This has limited the program to the amount of service that can be funded with the available federal allocation (15% of the total state Section 5311 allocation). As a result there have been few capital projects—two accessible vehicles, and marketing—because there is limited funding, and it would require the private for-profit carriers to provide the local match. There has also been very little awareness of the program, with marketing of the services performed by the carriers and no inclusion of intercity services (funded or not) in MDOT MTA information sources.

In the next chapter an overview of Section 5311(f) programs in other states is presented, along with recommendations about the need for changes in Maryland's program.

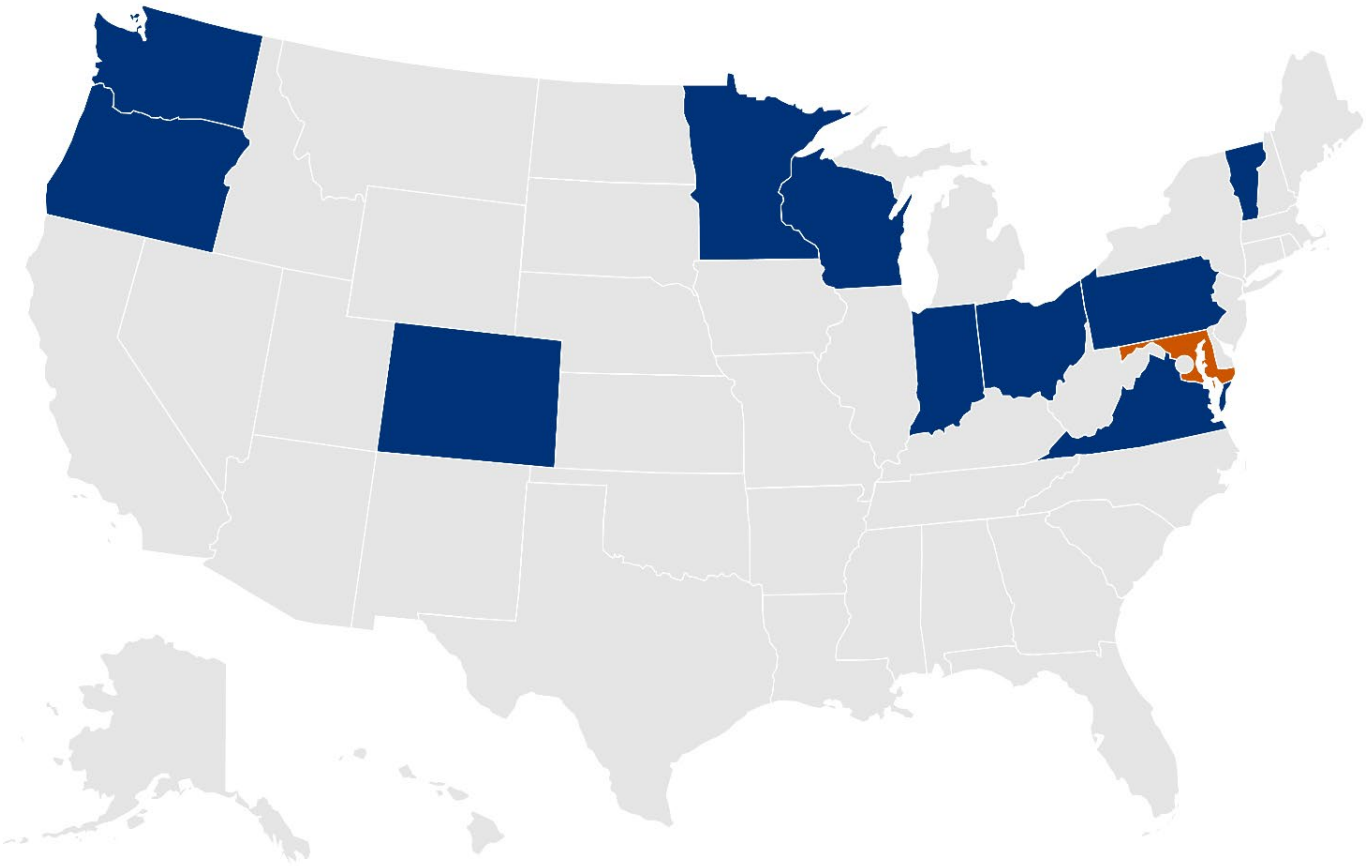
Chapter 2:
Options for Intercity Bus Programs—Survey of State Programs

Introduction

To determine if there might be other models for a state intercity bus program, a survey of states was conducted. States were selected to provide a range of alternative models. Questionnaire elements include their program guidance and structure, staffing, management of the Section 5311(f) consultation and set-aside, use of grants vs. contracts, results (coverage and utilization), and lessons learned regarding ridership development (particularly marketing and branding).

Surveys were completed for ten peer states: Colorado, Indiana, Minnesota, Ohio, Oregon, Pennsylvania, Vermont, Virginia, Washington, and Wisconsin. These states are highlighted in Figure 2-1. For each question the current Maryland program status or approach is presented, followed by information from each of the other states.

Figure 2-1: Intercity Bus Program Peer States Surveyed



Question 1: Funding Utilization and Certification

Does the state utilize the full fifteen percent Section 5311(f) set aside? Or does it certify that there are no unmet intercity needs, or a partial certification (and under what circumstances)?

Maryland	Maryland generally uses the full 15%, but there have been years in which the state signed a partial certification because not all the 15% was required to operate the priority routes.
Colorado	Yes, full 15%. Prior to the implementation state-funded service (Bustang commuter service), the state held back 2-3%. Previously, they had to certify there were no more unmet needs, but the last ICB study showed there are many unmet needs.
Indiana	15% exactly every year. Five or so years ago InDOT used a waiver for two services.
Minnesota	Intends to utilize the full 15% each year but has done partial certifications at times for program management purposes if invoiced amounts are less than available funds.
Ohio	In most years, Ohio uses full 15% set aside. In some years, a certification or partial certification that there are not unmet needs may be used, primarily as a funding management too.
Oregon	Uses the full 15% to fund a combination of contracted routes and grants to public and for-profit providers for discretionary intercity routes.
Pennsylvania	PennDOT utilizes full section 5311(f) set aside. Traditionally PennDOT uses section 5311(f) at 50% of the project operating deficit, matched with PA section 1516 at 25% of the deficit, and local match at 25% share of deficit. Local match is carrier revenues generated from non-intercity bus programmatic activities.
Vermont	Using well more than 15%, flexing 68% of the budget for intercity from other federal sources. Using it all for operating assistance.
Virginia	DRPT intends to fully utilize the full 15%. However, if the full balance is not required, DRPT will do a partial certification and allocate it to rural transit providers. Bi-weekly coordination meetings with marketing, planners, and 8-9 others.
Washington	Yes, the full 15% used for the four Travel Washington lines in operation. There is some underspent funding, but there are plans to add an additional line supported by that unspent funding. Half of CARES funding went to the four lines and connecting ICB service. WSDOT evaluated CARES applications based on the need to maintain regional connections to sustain service, considered any service that qualified as ICB.
Wisconsin	WSDOT attempts to fully use the 15% requirement through operating contracts with 4 contractors on 8 routes.

Question 2: Eligible Uses

Is all of the funding used for operating assistance? Or is there some funding for capital, or some for marketing or planning?

Maryland	Maryland uses in-kind match from Greyhound Lines as the local match for the operation of the two corridors (operated by Greyhound and Bayrunner Shuttle). Capital and marketing grants, if any, require a 20% local match—depending on the year a portion of that may be provided in state funds.
Colorado	5311(f) is just for operating. CDOT is providing buses for 5311(f) service, but not with federal funds. Marketing and planning are done centrally with CDOT (with FASTER state funds). State provides non-5311(f) funding (FASTER) for operations but has not been used for ICB yet. Will be in 2021 for 5311(f) routes.
Indiana	No state funding since providers are all for-profit, funds are from public mass transportation fund. ICB uses the Greyhound match, no state-kind match, just federal. Marketing is left up to carriers. All funding is for operating not capital.
Minnesota	Uses Section 5311(f) for operating, planning and marketing projects.
Ohio	In general, most funding is used for operating purposes. A small portion of the funding is used to cover the administrative costs of the non-profit agency who administers the service, and another small portion is used to cover the costs of intercity ticketing. Occasionally, capital items are purchased using intercity funds, but it is an infrequent occurrence and should not be expected to happen on a regular basis
Oregon	Primarily uses funds for operating. Contracted portion of the program provides is operating only, contract carriers provide the vehicles. For the discretionary element, eligible projects include regional connector services, planning, marketing, coordination, preventive maintenance, projects supporting key transit hubs, and capital assistance for buses and shelters. For-profit providers are eligible for vehicle grants under the discretionary program.
Pennsylvania	All funding is used for operating assistance. Do not award 5311(f) for capital purposes.
Vermont	All used for operating assistance, with a small amount of funds used for marketing and planning.
Virginia	Sets aside 15% of total 5311 allocation annually for the operation of the state's intercity bus network. Eligible expenses include system planning, marketing, capital investment, and all costs associated with the operation of service
Washington	Primarily looking at operating. In the past we used some for planning, and some for capital expenditures for vehicles when program was new (also used ARRA funding for vehicles). Carriers now provide vehicles as part of their contract, allows use of in-kind match. For Marketing WSDOT is developing a rough budget/strategy.
Wisconsin	No ICB funds for capital or planning.

Question 3: Consultation Process

Please describe the state's intercity bus Consultation Process. Is it described in the state's Section 5311 State Management Plan? Is it a letter/survey of existing carriers, a meeting, part of a study?

Maryland	Maryland issues a program grant solicitation every two years. Additional consultation is included in a periodic statewide intercity bus study. One such study was conducted in 2009-2010, and another is currently (2020-2021) underway. Because the state generally utilizes the full 15% a need has not been seen to conduct additional consultation.
Colorado	The SMP outlines the process. ICB providers are invited to participate in an advisory subcommittee. For Cares Act dollars, consultation process was conducted with outreach to legacy operators.
Indiana	We put up RFPs online, sent mailers and emails to everyone on the list. Plus, its added to the LPA program which goes out to local agencies.
Minnesota	Consultation is conducted as part of the periodic statewide intercity bus process, and biennially as part of the grant solicitation process.
Ohio	The intercity bus consultation process occurs as part of a needs assessment that ODOT performs every few years. This process includes an evaluation of all intercity bus service, evaluation of potential needs, surveys of intercity bus passengers, interviews with intercity bus providers, and other information. It is a comprehensive way to evaluate the intercity bus service in Ohio and see what might be needed in the future.
Oregon	There is no consultation process required for the full 15% for intercity bus. Private carriers receive RFPs for the state contracted routes, and the public and for-profit recipients identify needs and proposed projects through the biennial grant solicitation, which incorporates both state and federal funds.
Pennsylvania	State has begun to provide subsidy to existing routes. Today, PA's subsidized intercity bus network is a legacy of these dynamics. The carriers generally select their own routes and develop the schedules.
Vermont	Not required (not certifying there are unmet needs), so consultation process is not required.
Virginia	Conducts a statewide study of rural bus needs every five years. Illustrated in the SMP.
Washington	SMP has ICB section, we have consultation conducted as part of periodic statewide intercity bus study, staff maintains liaison with carriers in a continual consultation process.
Wisconsin	No consultation process in past few years because we expect to meet the 15% requirement. In the past when we did not expect to meet 15%, we mailed or emailed memos to various ICB contractors throughout the U.S. for input on how to meet requirement.

Question 4: Planning for Intercity Bus

What kind of intercity bus planning is conducted? Is there a statewide intercity bus plan, is it part of an overall statewide transit plan, or are there regional or route level plans?

Maryland	In 2009-2010 a statewide intercity bus study was conducted to identify needs, strategies and program management. An update of that plan is currently (2020-2021) being conducted. In addition, intercity bus needs are being addressed in the current development of a Maryland Statewide Transit Plan.
Colorado	ICB is part of statewide transit planning. Involves MPOs and other planning regions. This has sparked interest in local investment for Bustang and Outrider. With new routes in 2021, each planning region (TPR) sent feedback as stakeholder, they were receptive.
Indiana	Previous study was with RLS, new study out in 2021. Want to update every 3-4 years. There are MPO council meetings, 9 per year, providing an opportunity to discuss intercity bus needs, but usually there is no input on ICB needs. There is no ICB advisory committee, just conferences each year so ICB carriers can participate with public transit providers. It may be addressed in local/regional public transit service plans.
Minnesota	Periodically MnDOT conducts an update of the state's intercity bus study, first completed in 1997. This report updates the service inventory, identifies population trends, addresses program and policy issues, and evaluates performance of the routes and the network. It also typically includes a rider survey and a statewide community (non-user) survey.
Ohio	The overall need for intercity bus service is examined periodically through the needs assessment process as part of a statewide intercity bus plan. ODOT Office of Transit in coordination with the Rural Intercity Bus Advisory Committee reviews the status of the intercity bus program and makes determinations on how to proceed. There are not specific route/regional level plans.
Oregon	ODOT monitors the statewide network using TNExT, its own statewide public transit assessment tool. It recently published a Transit Network Report (2020), which assesses, among other things, statewide, regional, and intercity connectivity. The Oregon Public Transportation Plan (2018) establishes statewide policies and strategies concerning traditional public transportation modes, including intercity service and program needs and funding.
Pennsylvania	We have not developed a formal intercity bus plan. We are currently retaining consultant assistance to explore options that will hopefully improve the efficiency and meet unmet transportation needs.
Vermont	Intercity routes evaluated are a part of annual report to the legislature. Focusing on Route 4 corridor and making changes based on ridership and recommendations. Premier Coach, our main operator of Section 5311(f) service, works closely with the AOT on an ongoing basis.
Virginia	There is a statewide management plan, which highlights state management and FTA oversight. As part of the preparation of developing the state's intercity bus program component of the SMP, DRPT uses information from the periodic statewide study of rural intercity bus needs.
Washington	As part of the update of the statewide intercity bus plan, there was regional and statewide community engagement. WSDOT is exploring a virtual engagement process to identify needs. However, work on that and fifth line expansion is on hold due to uncertainty about funds for fifth line expansion. Know that study may be dated due to COVID, there's desire to build on telecommute culture.

Wisconsin	We use the statewide planning document (Connections 2030) to identify routes to include when advertising for proposals. WisDOT has not conducted ICB study given statutory authority to enter into contracts for service as part of 2009-2011 state biennial budget.

Question 5: Expansion Process and Criteria

How are decisions made regarding expansion of funded services? Criteria, process?

Maryland	Maryland has identified priority routes as a result of the initial planning study and those are identified in the grant solicitation. Maintaining service on these routes is the priority and because of the limited Section 5311(f) funding there have not been occasions to consider expansion, so no criteria or process has been defined beyond the general grant evaluation process described in the application.
Colorado	Statewide intercity and regional plans, statewide transit plan update used to identify potential routes. Proposed new services cannot exceed a projected $100 per passenger subsidy, which is also applied to existing service based on ridership levels. Another evaluation factor is the number of connections users can take. No farebox recovery criteria for "Essential Service", operated to connect rural areas to hubs.
Indiana	Carriers decide what to apply for, but state policy prevents duplication of services. InDOT has a new needs assessment and is scoring applications harder than the past. Usually the two main providers, Miller Transportation & Barrons Bus Lines split routes. InDOT will have community scoring in the future. InDOT allows carriers to propose routes, the carriers work together and are transparent with each other. Planning to discuss interstate routes with OH ICB team.
Minnesota	The 2010 Minnesota Intercity Bus Study proposed cost effectiveness and coverage performance measures which are being updated in the current study. While these have provided general guidance for consideration of applications by MnDOT, the fact that the applications do not define desired, or priority services has meant that carriers have taken the primary initiative to propose new routes or services as part of their overall application.
Ohio	ODOT Office of Transit in coordination with the Rural Intercity Bus Advisory Committee review available funding and service needs and make determinations on whether service should be expanded and if so how. This determination is often assisted with info from HAPCAP. Potential needs identified in the statewide plan, conducted periodically.

Oregon	The planning process identifies gaps in the intercity bus network and intercity feeder services for some of which contracted services are sought through an RFP process. Regional intercity/feeder routes are proposed for the discretionary program by local/regional public transit providers and evaluated for funding based on needs identified in the statewide planning process. Services proposed under the discretionary program are evaluated based on the degree to which they address ODOT policies regarding regional connectivity. This includes encouraging a minimum level of service between every place of 2,500 and the nearest larger population center and the development of hubs where three or more routes connect.
Pennsylvania	Carriers are contractually obligated to communicate material changes in service in advance with the department. There are no additional funds available should the carrier's deficit increase.
Vermont	All starts with AOT's annual route performance report to the legislature. Proposed changes in recent years are in response to identified performance issues. The basic structure of routes came from previous planning studies, including the Public Transit Policy Plan which is updated periodically.
Virginia	Decisions are based on the study conducted every five years, which aims to identify areas of needs. Study most recently identified two corridors of need.
Washington	Expansion decision born out of the study, went through process, found handful of locations to explore. We began the year looking at how to get folks from central WA to Portland. Worked with Oregon DOT to connect our two systems for a fifth line extension. On hold now. There are public/private operators we are in conversation with. On OR side, we combined study docs and see if we are missing anyone. We want to leverage each other's funding.
Wisconsin	Since 2011, WSDOT has funded all routes proposed in the RFP process, which operates on a 5-year cycle. The department is in the process of making awards for 2021-2015 service. Decisions regarding awards are based on available funding (meeting the 15% requirement) and long-term funding of routes after CARES funding depleted.

Question 6: Performance Criteria and Funding

How are decisions made regarding eliminating funding for particular services? Are there performance criteria?

Maryland	A minimum 15% farebox recovery has been identified as the sole performance threshold in the program. Routes or services operating with lower farebox recovery levels are candidates for restructuring, and if that is unsuccessful elimination of funding is possible.
Colorado	Rather than defunding low-productivity services, there is an effort on improving the service, especially for essential services? For example, a passenger cannot make a connection if it is only available in the middle of the night/inconvenient time. No service is provided if over the $100 per passenger subsidy threshold.

Indiana	Did not have performance criteria two years ago, started asking for farebox and on-time performance in 2020. Sensing ICB will be more competitive, but do not have baseline data ready. Data is not in their contracts but needed to rebid. Allocated CAREs funding based on expenses, split with existing providers and Greyhound.
Minnesota	Although the previous state intercity bus study recommended several performance criteria, these have not been applied to particular services that might be candidates for reduction.
Ohio	ODOT Office of Transit in coordination with the Rural Intercity Bus Advisory Committee review available funding and service needs and make determinations on whether service should be cuts and if so, how. This determination is often assisted with info from HAPCAP. Specific routes are examined for performance including looking at ridership, costs, farebox recovery, and other metrics.
Oregon	ODOT assesses the cost-effectiveness of services during review of discretionary project proposals. Fund awards may be adjusted to reflect a reasonable cost per mile but would rarely be completely defunded.
Pennsylvania	PennDOT has retained consultant assistance to help design performance criteria for service. Currently have local fixed route performance standards but not any for intercity bus at this time.
Vermont	Yes. The productivity performance standards for intercity services grade services as "Successful" if they exceed 3.28 boardings per trip and do not exceed a subsidy of $30 per passenger.
Virginia	Different performance measures are analyzed monthly, quarterly, and annually. Measures include on-time performance data, ridership, number of trips conducted, bus cost, farebox revenue, cost to run service, cost per revenue mile, cost per passenger, and connected trips-in-kind miles.
Washington	There is no policy on that yet but want to keep an eye on routes that should not be operating, sometimes buses run empty. Providers say it is harder to get ridership back if we cut service now. The Travel Washington operators were not reliant on farebox enough to scrap service during the pandemic, but a number of airport shuttle and Greyhound services were cut. Some connections were dropped entirely, not just frequency reductions—some massive. Some cuts significantly impacted ridership on Travel Washington routes since they were major connection points.
Wisconsin	No performance criteria, as contract payments are just enough to meet 15% requirement.

Question 7: Section 5311(f) Operators

Who are the operators of Section 5311(f) services in the state? Are they private for-profit firms, public transit providers, private non-profit? Please provider carrier names associated with particular routes or services.

Maryland	There are two private **for-profit** firms receiving Section 5311(f) grants for rural intercity service: Greyhound Lines and BayRunner Shuttle. Greyhound operates a local route using US 1 and US 40 from Washington, D.C. to Wilmington, DE, one roundtrip per day. MDOT MTA funds the Maryland portion of the route. BayRunner Shuttle provides two daily roundtrips from Baltimore to Grantsville, MD with intermediate stops.
Colorado	Combination of non-profit and private for-profit providers. **Non-Profit** – Southern Colorado Community Action Agency: Durango to Grand Junction; Pueblo SRDA: Lamar to Colorado Springs; Alamosa to Pueblo. **Private-for-Profit:** Greyhound: Craig to Denver; AEX Corporation (Alpine Express) Gunnison to Salida to Denver.
Indiana	**Private for-profit** providers: Barrons Bus Lines, Miller Transportation. No non-profits.
Minnesota	Currently there are two private **for-profit** firms that are grant recipients under the Section 5311(f) program: Jefferson Lines and Land to Air (Blue Earth Blue Sky).
Ohio	There is currently a **non-profit** agency (HAPCAP) that administers the intercity bus service on behalf of ODOT. HAPCAP then provides service along multiple specific intercity bus routes in the state through the use of third-party contractors, which are then selected through an RFP process. ODOT then reimburses HAPCAP for the costs associated with providing service as well as their administrative expenses. Private intercity bus providers also run other service, but it is not funded through the 5311(f) program in Ohio.
Oregon	Oregon has two elements to its 5311(f) program. The POINT intercity routes are provided only by private **for-profit** carriers through a competitive procurement by the state and are operated as third-party contracts. Current contractors include Northwest Navigators Luxury Coaches, MTRWestern (two routes), and Pacific Crest Bus Lines. ODOT distributes the remainder of 5311(f) funds through a discretionary grant program, which is open to public agencies, private for-profit providers, and non-profit providers.
Pennsylvania	Two carriers: Greyhound and Fullington Auto Bus Company. https://www.penndot.gov/Doing-Business/Transit/InformationandReports/Documents/BPT%20Annual%20Report%202018-19.pdf
Vermont	Premier Coach (doing business as Vermont Translines) and Greyhound.

Virginia	DRPT funds two intercity services: SmartWay and Virginia Breeze Bus Lines. SmartWay is a commuter bus service that connects the Roanoke Valley to New River Valley; and express service that connects Blacksburg to Roanoke. Both lines are operated by Valley Metro. Virginia Breeze has three routes: Valley Flyer (I-89 corridor), Piedmont Express (US-19/15), and Capital Connector (VA southern racing region to Richmond and D.C.)—all operated by Dillon's Bus, a Coach USA subsidiary (also a Megabus operator).
Washington	Four Travel Washington lines are operated by Greyhound Lines, Central Washington Airporter (two routes), and Northwestern Stage Lines operates the fourth route. All are **for-profit**, no public transit or non-profits are permitted to bid on these intercity routes.
Wisconsin	WisDOT contractors Jefferson Lines (Minneapolis to Milwaukee via Green Bay; La Crosse to Milwaukee), Lamers Bus Lines (Madison to Wausau; Madison to Green Bay; Milwaukee to Dubuque), Indian Trails (Escanaba to Milwaukee; Duluth to Hurley), and Wisconsin Coach Lines (Janesville to Milwaukee) are private firms.

Question 8: Intercity Bus Network

Please provide a map or description of the state's intercity bus network, showing Section 5311(f) routes (and unsubsidized, if possible), and/or a brief description of services funded. This could be link to something online.

Maryland	
Colorado	Bustang website: https://ridebustang.com/routes-maps/ has system map with links to maps of individual lines.
Indiana	In study. Shipshewana route is new.
Minnesota	In study.
Ohio	https://www.transportation.ohio.gov/static/Programs/Transit/OhioIntercityBusStudy.pdf
Oregon:	https://www.oregon.gov/odot/Data/Documents/Long-Distance-Transit-Map.pdf

Pennsylvania	Page 194-195 of annual report: https://www.penndot.gov/Doing-Business/Transit/InformationandReports/Documents/BPT%20Annual%20Report%202018-19.pdf
Vermont	GoVermont has intercity bus page. Updated intercity routes are still being developed.
Virginia	Online at www.Virginiabreeze.org and www.smartwaybus.com.
Washington	Map on website. Interested in reworking map and look more at regional picture.
Wisconsin	https://wisconsindot.gov/Pages/travel/pub-transit/bus-service.aspx

Question 9: Funding as Grants or Through Contracts

Is Section 5311(f) funding provided through a grant or under a contract issued as part of an RFP process?

a) If an RFP/Contract, what is the term, how often are they rebid?
b) If a grant, are they renewed with an annual (or biennial) application.

Maryland	Funding is provided as a grant through the Office of Local Transit Support (OLTS). The application and grant award covers a two year period. The application is separate from that used for local transit support provided by MDOT MTA.
Colorado	**a.** The choice of a competitive RFP or a grant solicitation varies by route. Bustang commuter service is procured through a third-party contract. For the Bustang Outrider routes (Section 5311(f)) the preference is a grant solicitation. A major factor in deciding which process to use is the availability of infrastructure. Either method includes a scope of services for a specific service (ex. one trip per day, between x and y), interline connections with the legacy ICB network, and other Section 5311(f) requirements. **b.** Grants are annual, with three or so option years. There are a number of private operators who want to bid.
Indiana	We do a grant application, get 5311(f) from FTA, then split it between providers. They apply for it, then we score it and do a contract. We have quarterly claims. Contracts are for one year except for CARES which is 18 months. They use it or lose it.
Minnesota	The Section 5311(f) program is a grant program.
Ohio	The section 5311(f) funding is provided to a private non-profit subrecipient, such as HAPCAP, as a grant. HAPCAP issues RFPs for third-party contractors to operate the services. These contracts are multi-year for a base period, with annual renewals to a maximum of five years.
Oregon	Oregon's Transit Network Program has two components: contracted intercity routes defined by ODOT, operated by private for-profit firms in response to state RFPs, and a discretionary program to support additional intercity services. The discretionary grants are two-year grants and are competitive, so long-term funding is not guaranteed. The term of contracted service contracts is typically five years.
Pennsylvania	We are currently exploring the possibility of making 5311(f) available via competitive RFPs. Currently, we only use annual grants, which require subrecipients to submit an annual application based on the state fiscal year (July-June).
Vermont	RFPs resulting in contracts. Two-year contracts with two add-on years. The RFP specifies the services required by AOT. Greyhound uses its own in-kind miles as match for its 50% of the net operating cost. Premier Coach is cost per mile (using state funds for match). Cares Act funds for Greyhound is currently being used.
Virginia	VA Breeze operator is decided through RFP/contract. Contract is for two years with optional 3 one-year renewals.
Washington	RFP for competitive bid process. Not many bidders, and there may be even fewer after COVID. Hopefully, it will become more competitive. There is a need to develop more criteria to evaluate smaller providers firms that might submit proposals.
Wisconsin	All 5311(f) funds are awarded through contracts. WisDOT is not allowed to enter into grant agreements with private operators for ICB service. RFPs conducted on a five-year basis. Contracts typically one year with four one-year options.

Question 10: Multiple or Single Contracts or Grants

Are there multiple contracts or grants, with different contracts for different routes? Or one agreement for all routes in the program?

Maryland	Each operator currently provides one route, and there is a single separate grant to each operator.
Colorado	Separate RFPs that are really grant solicitations for a specific service.
Indiana	One contract per provider, when they apply they breakdown each route. With Barrons, they had extra money, so we added a new Shipshewanna route. Each route has separate expense line items.
Minnesota	Under the Section 5311(f) program all routes are included in a single contract, through two separate entities that are co-owned provide the service. CARES Act funding included two firms.
Ohio	HAPCAP is currently responsible for providing the service for all routes of the intercity bus program funded by ODOT under a grant to them. HAPCAP uses contractors to provide the service and currently there are two contractors who are being used to provide the service.
Oregon	There are four separate contracts, with three different firms for the state-contracted services
Pennsylvania	Two subrecipients: Greyhound (operates three routes) and Fullington (operates nine routes). The routes are not tied to the grant but rather each grantee operates legacy routes.
Vermont	Each route has its own contract.
Virginia	Currently have one contract for Valley Flyer service (based on timing of deploying new routes). There is a separate contract for Piedmont Express and Capital Connector routes. Both contracts are operated by same contractor (Dillion's Bus Service).
Washington	Yes, there are three providers, with a separate contract for each of the four routes. Most are on a four-year bid cycle to minimize revisiting the RFP process. Contracts include the ability for extensions if the provider is meeting requirements and providing quality service. The contracts allow for one renewal and then firms are required to respond to a new RFP. These are contracts, not grants.
Wisconsin	One agreement (a contract) for each vendor that covers all routes they perform.

Question 11: Source of Local Match

What is the source of match? For operating projects? —State funds? Local funds? Carrier funds? Or Section 5311(f) in-kind match from connecting unsubsidized service? Some combination? For capital projects? Is it different for vehicles and other capital (stations/shelters, etc.)?

Maryland	Match for operating projects is provided through the in-kind match provisions of FTA's Section 5311(f) program. Greyhound Lines provides the match for both its own subsidy route and that operated by BayRunner Shuttle. For capital or marketing, the local match must be local (in this case carrier) funds.
Colorado	Source: Toll credits - Transportation development credits (TDCs). Not enough for building highways, credits need to be spent so credits go to ICB. Similar to in-kind miles. Most in-kind match will be from TDCs. CDOT could not get Greyhound match.
Indiana	Greyhound in-kind. Usually way overmatched. Greyhound will give $1.2 million but the carriers will only need $500,000. No match from the state. There is a legal prohibition for for-profits to use state funds.
Minnesota	For the Section 5311(f) program the local match for operating grants (50% of the net operating deficit) is provided from state funds, State policy has allowed for use of in-kind match in the past.
Ohio	In general for operating projects the source of the match is the in-kind match from connecting unsubsidized intercity bus service (Greyhound). For administrative/ticketing costs, the match is most often local cash provided by the agency or on occasion, Transportation Development Credits to effectively fund these costs at 100% federal.
Oregon	For the contracted POINT routes the local match is provided by a mix of state funds and Greyhound Lines in-kind match. For Section 5311(f) funded projects, the usual federal match requirements of 50 percent of net deficit for operating projects and 20 percent for capital projects apply. The source of match differs by recipient and might be a combination of the match sources listed above.
Pennsylvania	Generally follow, but never exceed the following deficit funding for operating: 5311(f) - 50%, PA Section 1516 - 25%, Carrier local match - 25%. We do not provide capital funding to intercity bus program. Cares Act funds this year is only for subsidized service but will be doing in-kind after that.
Vermont	50% of operating cost for Greyhound (in-kind). Premier Coach is cost per mile (using state funds for match). Cares Act funds for Greyhound is being used currently. State funds about $60,000 - $80,000 per year. Largely in-kind match.
Virginia	DRPT allows the use the value of unsubsidized connecting intercity bus service as local in-kind match for operating projects. Combined with Section 5311(f), this funds the entire net operating deficit of subsidized segments.
Washington	The source of local match is Greyhound in-kind. Service has suffered during this COVID pandemic, and we are holding back some CARES funding knowing it may be needed. There is a question about the future availability of in-kind match, depending on how Greyhound ridership recovers. WSDOT is meeting with other states regarding CARES funding so Greyhound has a better picture of what is happening.
Wisconsin	No state funds for ICB. Match is through in-kind from connected unsubsidized service. If no in-kind, then the carrier is responsible for any match. WisDOT has no ICB capital program.

Question 12: Basis of Payment-Per Mile or Line Item

Is the basis of the contract or grant for operating assistance, contract or grant a cost per mile (times the number of bus-miles operated in the project), or is it a line item budget (with amounts for each budget line-item such as labor, fuel, administration, etc.) If it is a line item arrangement, is there a cost-allocation plan for to assign joint expenses to the contracted services?

Maryland	The grant application calls for general high level line item expenses. There is no cost allocation plan for specific line item costs.
Colorado	Grant - cost per mile, including all operating costs. The RFP (grant solicitation) requires a line item breakout of cost, but monthly reports and invoices are based on the per-mile cost.
Indiana	We have an average cost per mile for all claims. They have to provide budget for labor, facilities, marketing, cost per mile/route, and then aggregate the cost per mile for claims for each route.
Minnesota	The Section 5311(f) cost reimbursement is based on a line item budget for each route—in practice the carrier's overall budget is allocated on a per-mile basis to each of the routes or services.
Ohio	For HAPCAP reimbursement from ODOT, they submit a line item budget and then invoice against the budget. This invoice process also includes supporting documentation from HAPCAP of the service provider costs to them. For the third party service provider invoices to HAPCAP, they invoice on a per-mile cost which was established in the contract
Oregon	For state-contracted service, the carrier cost is based on a cost-per mile agreed upon in the contract. For the discretionary grant program, the cost reimbursement is based on a line item budget for the particular project.
Pennsylvania	Carriers submit an application containing documentation of costs and expected revenues supporting their estimate of the projected deficit. The state awards a grant to cover as much of the deficit as possible. Grantees are paid 12 equal subsidy payments each year (monthly basis). A reconciliation takes place after the fiscal year, using audited financial data to determine if there are any unjustified funds. If so, those funds are recovered in the subsequent grant.
Vermont	Service is provided on a cost per mile basis.
Virginia	Proposals received for operating service outline a total cost per mile. Specific items are also broken out in details (such as labor, fuel, administration, insurance) in the proposal.
Washington	Carriers bid a cost per mile, and bill on that basis. This keeps the process simple and allows easy comparison of competitive bids.
Wisconsin	Payments are made on a cost per mile basis, as proposed in the RFP for the first year and then increased each year based on CPI-U.

Question 13: Meaningful Connection with the National Network

How does the state define a meaningful connection with the national network of intercity bus services? Does the state use a particular definition of the National Network? Does the contract or agreement require that the Section 5311(f) services be interlined? With the National Bus Traffic Association (NBTA) system?

Maryland	It is strongly encouraged but not required that applicants be members (or join if not already a member) of the National Bus Traffic Association (NBTA) national interline ticketing system, potentially as a sponsored member through Greyhound. There is no other specific definition of the national intercity bus network. A meaningful connection to the national network is identified as a national program goal, but there is no specific definition of a meaningful connection in the Maryland program or application.
Colorado	Strongly recommend carriers interline and join the NBTA. Phase 4 (Essential Service) routes will not necessarily make meaningful connection.
Indiana	Meaningful connection requirement is in the grant solicitation but is not defined in detail. Carriers are required to be part of the MAX ticketing system, the Greyhound/ interline system.
Minnesota	Recipients are required to be part of the National Bus Traffic Association system of interlined carriers.
Ohio	ODOT considers meaningful connections with the national network of intercity bus service to be those connections which include stops at intercity bus terminals or other major transportation network centers, having schedules which connect to other bus providers in a manner to allow a person to exit one bus and get on another bus and/or allowing for interlining.
Oregon	Projects funded with Section 5311(f) are required to make a meaningful connection to both the Intercity and Statewide Transit Network including passenger rail. Unless infeasible, interline agreements are required through every 5311(f) grant agreement.
Pennsylvania	Follow FTA's 5311 program circular for guidance. As long as a route meets FTA's criteria for connection, it is considered in compliance with requirements. All routes are interlined by default.
Vermont	Not an issue for Vermont. Service is interlined with the national network, required in contract.
Virginia	State does require that meaningful connections with the national intercity bus network be made by its contracted operator and its partners. This provides an intercity bus network linking cities across the majority of US. Section 5311(f) carriers have interline ticketing with Megabus, but are not part of the Greyhound/National Bus Traffic Association interline system.
Washington	Travel Washington contractors have to be interlined with the National Bus Traffic Association interline system. All four routes are also Amtrak Thruway routes. CARES act response focused on role of interlining in serving rural areas, funding was used to support previously unsubsidized service as there were other qualifying ICB lines, based on availability of interline ticketing.
Wisconsin	WisDOT considers meaningful connections where subsidized routes feed other corridors where Wisconsin resident can gain access to economic and travel hubs in surrounding states.

Question 14: Branding for Funded Services

Has the state established any branding for the funded services? For all services? By route? Explain or describe.

Maryland	Each carrier has their own branding, and there is no public identification of the fact that MDOT MTA is providing support for these services.
Colorado	Bustang is the brand for CDOT commuter services into Denver, and Bustang Outrider for the Section 5311(f) routes. All share the same Masabi fare payment system and website. Bustang and Outrider each work with a marketing agency.
Indiana	No statewide branding, providers in charge of their own marketing. Barons does more local marketing, routes branded individually. Indiana cannot spend funds on branding, only the provider can.
Minnesota	The grant recipient utilizes their own brands, Jefferson Lines and Land to Air.
Ohio	State program routes are all operated under the GoBus brand, with a shared website, telephone information system, and ticketing operated by HAPCAP.
Oregon	The four contracted routes are all branded as POINT (Public Oregon Intercity Transit) routes, with a shared website, a common logo, and vehicle paint schemes. Other routes in the discretionary program are branded by their provider.
Pennsylvania	Recently began discussing this and currently relying on carrier branding.
Vermont	Vermont Translines and Vermont Shires Connector, Go! Vermont state transit information site provides information and links for all intercity services.
Virginia	The DRPT funded system is branded Virginia Breeze Bus Lines, and routes were recently rebranded when the service was expanded to three routes. Marketing is conducted on behalf of DRPT for all three routes.
Washington	Travel Washington is the WSDOT statewide brand for Section 5311(f) services. Each individual line has its own name and logo, which belong to the line (not the operator), so customers know it under that name. The providers fall short on their own marketing. Smaller carriers like Northwestern have few staff so WSDOT is working on providing state support for marketing.
Wisconsin	WisDOT does not require branding.

Question 15: Marketing

How is marketing supported and information provided? Are these functions required as part of the contract with the carrier? Is additional funding provided to carriers, or required as part of contract no additional funding? Or are there separate agreements with marketing firms, GTFS providers, etc.

Maryland	Marketing is an eligible line item expense in the overall operating cost, and applicants may (have) received specific grants for marketing these services—though the marketing is part of carrier-wide marketing efforts. There is no information about intercity bus services provided as part of the MDOT MTA web site, nor are there links to carrier websites. Intercity bus stops are now shown on MDOT MTA statewide transit maps available on the web—but in general marketing is in the hands of the grant recipients.
Colorado	**Bustang:** CDOT contracts with an advertising agency that works specifically with Bustang, provides a $100,000 annual budget for marketing. **Bustang Outrider**: The same agency did the branding, but another agency provides the marketing support. There is a $100,000 annual budget for marketing. **Masabi:** Provides fare payment system. Visual and moving tickets provide enhanced security. CDOT is working with Denver RTD to develop (FTA Grant $750k) an **interlined ticketing system** for Bustang and RTD. Other large Colorado systems are also transitioning to Masabi giving the potential for interlining across the state.
Indiana	Marketing not required in the carrier budget, but it is expected that carriers will provide that as part of their operations.
Minnesota	MnDOT provides marketing funds to the carriers for their use in marketing intercity bus services generally, as well as the specific Section 5311(f) funded routes. There are separate grants for marketing.
Ohio	HAPCAP provides for marketing the GoBus system, including a website, extensive community outreach events, the ticketing platform and telephone information. Some functions (graphics, etc.) provided by contract.
Oregon	For the POINT routes, marketing is performed by ODOT primarily through its website support and branding. For discretionary grants, marketing is included as an eligible line item expense and is conducted locally.
Pennsylvania	No additional funding is available. Greyhound has submitted GTFS data to the National Intercity Bus Atlas, and PennDOT is encouraging Fullington to do the same. Carriers are incentivized to market the service since they must cover a portion of their operating deficit. Carriers are contractually obligated to PennDOT to establish public timetables.

Vermont	Go! Vermont is the on-call one-click option for the entire state. FHWA funds flexed into Go! Vermont for funding. Contract with carrier spells out schedules. GTFS flex does a better job for rural transit being captured. Used to develop open trip planner. These are then part of the Transit App as it is updated. Hoping GTFS flex will be ready from Google within a year. Trillium working on payment.
Virginia	DRPT has a separate agreement with a marketing firm, Reingold Inc., to conduct its marketing and outreach. Employs a staff liaison with Reingold to oversee efforts and ensure information provided is accurate.
Washington	Working on GTFS. One carrier has not provided GTFS data. We have data team within our transportation division that does GTFS for all agencies. WSDOT reaches out if it has a request for data.
Wisconsin	Marketing requirements are set in the RFP. WisDOT does not require additional materials on a regular basis but will inquire about marketing practices during the course of the year.

Question 16: State Supported User Information

Does the state provide information (website, telephone information, etc.) itself? For all intercity services? Only for the Section 5311(f)?

Maryland	MDOT MTA does not provide any information about the Section 5311(f) or any intercity bus services, except through identifying stop locations on MDOT MTA web maps.
Colorado	Links to private/nonprofit providers on the website, which has info only on in-state service.
Indiana	On InDOT transit page and annual report, only for 5311 services.
Minnesota	MnDOT does not provide user information and does not have a trip-planner. Public information provided on the MnDOT website about all public transit providers does include the intercity carriers in the Section 5311(f) program.
Ohio	ODOT has a website with basic information about the Section 5311(f) program and how to apply for grants. However, specific information regarding the GoBus program is not included on the website.
Oregon	The ODOT website provides POINT and Amtrak information. ODOT has a contract for Trillium Solutions to create and maintain GTFS data for local and intercommunity transit providers, including the POINT. These feeds, and GTFS provided through other sources are posted at www.Oregon-gtfs.com. The Oregon-supported trip-planner is GetThere. Oregon-gtfs.com notes that GTFS data is used by Google Maps, Bing Maps, Transit App, and other trip planners.

Pennsylvania	Only provide information on the 5311(f) funded routes. Open to suggestions on how to accurately track all the unsubsidized services.
Vermont	Go! Vermont website.
Virginia	Smartway is through an existing agency (Valley Metro) which promotes its service on its webpage, telephone, etc. DRPT focuses on maintaining a webpage for VA Breeze (www.Virginiabreeze.org).
Washington	WSDOT is becoming more involved in supporting this need, no longer just relying on telephone information and a static website. Greyhound is influential in convincing other interline carriers to improve and provide GTFS information. The state role is expanding as well.
Wisconsin	WisDOT provides this information for all intercity bus service on its web site at the page below: https://wisconsindot.gov/Pages/travel/pub-transit/bus-service.aspx.

Question 17: Required Amenities

Are any particular amenities such as bicycle racks, Wi-Fi, shelters, etc. required?

Maryland	There are no requirements that funded carriers provide bike racks on vehicles, wi-fi or station/stop amenities, other than requiring compliance with the appropriate ADA requirements and providing baggage space on the vehicles.
Colorado	Full-size buses include full amenities—bike racks, wi-fi, power outlets, etc.
Indiana	No, but all equipment should have Wi-Fi, power outlets. Bike racks are not required. Carriers have discretion on this, even their worst bus is better than many.
Minnesota	Wi-fi and bicycle racks are not required, but wi-fi is provided on Section 5311(f) funded routes by the carriers.
Ohio	There are shelters at some locations with ongoing plans to put more into place.
Oregon	While encouraged, wi-fi, bicycle racks, etc. are not a required element of the POINT contracts nor of discretionary grant agreements.
Pennsylvania	Our grant contract requirements speak of cleanliness of vehicles, but not specific amenities.
Vermont	No information provided on state requirements. Vermont Translines buses are equipped with Wi-Fi, and bicycles are carried in the baggage bays after all other baggage and express is loaded—the firm prefers that they be boxed if possible.

Virginia	Required to have luggage storage available. In addition, Wi-Fi and charging ports are available as well.
Washington	No to other amenities. No Wi-Fi. COVID has us look at Wi-Fi in some parts of state. No bike racks currently but active transportation department has brought it up.
Wisconsin	WisDOT does not require certain amenities, but proposals must include any amenities so that the Department can evaluate the type of experience to be had by the rider.

Question 18: Fare Payment Systems

What is the fare payment system—are there on-line options, mobile fare payment?

Maryland	Fare collection systems are provided by the grant recipients for their own services. BayRunner Shuttle also has interline ticketing with Greyhound, and with Amtrak from rail connecting passengers. Tickets purchased through these carriers can utilize their mobile ticketing and on-line options. Greyhound uses the Transcor NBTA ticketing platform, and Amtrak has its own system.
Colorado	Mobile ticketing and cash, use Masabi fare payment system.
Indiana	Providers do online, mobile and paper. No cash accepted for payment when boarding unless via mobile.
Minnesota	Section 5311(f) recipients perform their own fare collection using their own system. Jefferson Lines and Land to Air both use the Transcor national intercity bus ticketing system.
Ohio	HAPCAP operates the GoBus ticketing platform, and all carriers are interlined with Greyhound, in addition to having their own ticketing platforms.
Oregon	On the POINT routes, each contractor is responsible for fare collection and accounting.
Pennsylvania	Greyhound's payment systems (cash, online, mobile). Fullington is a Trailways carrier and are cash and online.
Vermont	All carriers are interlined with Greyhound, but also have their own ticketing platforms.
Virginia	Trip planning can be made through VA Breeze webpage. They are then directed to Megabus site to book tickets online. A recent study found that well over 50% of all bookings are conducted through mobile phones.
Washington	No mobile fare payment. Not at top of our priorities. Falls on provider's bandwidth, Greyhound has potential. WSDOT is focusing on making all websites and schedules available on mobile phones.
Wisconsin	Each vendor is responsible for their own payment system. WisDOT requires proposers to outline their system (typically online, mobile fare, phone) during the RFP process.

Question 19: Fare Levels

If known, what are fare levels (typical intercity about $0.20 per passenger mile, airport premium services about $0.35 per mile, commuter/rural $0.10 per mile)? Are these determined in some way by the state, or does the contractor set the level and structure?

Maryland	Fares are set by the grant recipients. Greyhound fares are typical intercity bus fares, varying with the date of purchase (lower for trips in the future) and some particular fare categories. BayRunner fares per mile are considerably higher, more typical of airport shuttle fares. MDOT MTA has no requirements or policies regarding fares on Section 5311(f) funded services, no information is required as part of the application.
Colorado	Still use $0.17 per passenger mile, even for rural Outrider routes. This seems to be a universally accepted fare level.
Indiana	About 38 cents/mile on average, set by contractor based on demand and operating cost. Varies by provider. Full cost per mile not just passenger mile. We require financial audit but not broken-down cost allocation plan.
Minnesota	The contractors set their own fare structures and levels to be compatible with the national interline ticketing system.
Ohio	Typical intercity fare levels.
Oregon	Contractors set their own fare structures. POINT fares are generally comparable to national intercity bus fare levels. While grant recipients set their own fare structures, ODOT encourages structures that make services as accessible as possible for low-income communities.
Pennsylvania	The carriers set the fares based on market conditions. Fares change daily.
Vermont	The carriers set fares based on comparable interline fare levels.
Virginia	DRPT ultimately decides on the fare structure. Existing service is used to decide fare rates, as well as other factors. The passenger cost per mile changes monthly because of the variance of connecting miles passengers, etc. DRPT also reviews other providers fares to ensure they are inline.
Washington	No major changes with fare levels, which are in-line with intercity rates. Stakeholders and riders say it is too expensive, the fare is a big barrier if we are trying to encourage people to use service across massive distance. We can look at ICB as way to get money or as a way to get people to ride transit.
Wisconsin	Contractors set their own fare structures. The structures vary greatly, from simple city-to-city amounts to complex dynamic pricing.

Question 20: GTFS Data Requirements

Does the state require the contractor to provide GTFS data on the services? If so, where is that stored/used/made available?

Maryland	MDOT MTA recommends that applicants provide their data (which would be GTFS) to Google Transit, but it is not required. Greyhound Lines does have this data, and provides it to Google.
Colorado	• Connect Colorado project – Trillium under contract to develop and provide GTFS data. • GTFS is currently available for all Bustang service. • RTD ready to launch real-time GTFS next spring.
Indiana	The state does not require that carriers provide GTFS and InDOT is not sure if GTFS is provided.
Minnesota	This data is not required by MnDOT. Jefferson Lines and Land to Air have provided GTFS data to the USDOT.
Ohio	No, this is not currently a requirement.
Oregon	ODOT requires contractors and grant recipients to provide and update GTFS data for fixed route services. ODOT has a contractor in place to help create and maintain this data.
Pennsylvania	Currently, does not require GTFS data. PennDOT has a program called "Find my ride PA," which encourages GTFS data, but doesn't require.
Vermont	Vermont for Premier. Greyhound has not allowed them to do so yet.
Virginia	Not required but try to obtain the GTFS static files and stores on server. Trying to determine the best way to utilize this data.
Washington	Carriers do not provide this but WSDOT has an in-house data team that does GTFS.
Wisconsin	WisDOT does not require that data. Ridership and revenue data are included with quarterly Invoices to the Department.

Question 21: Coordination with Public Transit

Is there any particular coordination with local or regional transit? Use of public park and rides, intermodal centers, etc.?

Maryland	MDOT MTA requires evidence of coordination with local transit providers as part of the application. The Greyhound agency/terminal in Salisbury, MD is the regional transit provider Shore Transit, and there is a joint ticketing arrangement. The Greyhound stop in Hagerstown, MD is at the Washington County Transit Center. In Cumberland the Greyhound/BayRunner stop is at the Amtrak train station, in Frederick Greyhound stops at the MARC station, as it does in Aberdeen, MD. Greyhound stops at the College Park Metro Station, and its affiliate BoltBus stops at the Greenbelt Metro station. BayRunner Shuttle also stops at the BWI Thurgood Marshall Airport main terminal, and the BWI Amtrak/MARC station.
Colorado	RTD - There was hesitation to work with private for-profits, but because of budget problems and rapid expansion of rail, light rail, they are letting Greyhound into the building. No problem using RTD park and rides, now there is a push for mobility hubs. Plan for center-loading station in Loveland for Bustang. CDOT would like to serve Castle Rock but there are issues with finding a park and ride site and local support.
Indiana	Providers stop at agency areas like Anderson Regional Transit Center, Indianapolis. Lafayette Union Station. Stops on the way to Chicago for connections, especially urban areas. Park and rides are not required. Some are in Walmart lots. Providers decide where to place stops.
Minnesota	MnDOT policy favors connectivity, and the carrier recipients utilize public intermodal terminals where available, including those in major cities such as Minneapolis, St. Paul, Duluth, etc.
Ohio	There are some local transit agencies who make coordinated efforts with bringing passengers to stops to be able to use the GoBus intercity bus services.
Oregon	POINT routes are designed to connect with local transit and with Amtrak and Greyhound services, and so utilize many transit transfer points and public intermodal connection points. Grant recipients are strongly encouraged to maximize use of public transit facilities. Oregon defines Key Transit Hubs as stops where three or more fixed-route transit services connect, where none of the three routes is wholly within the service area of either of the other two services. Many of these hubs are transit centers, or Amtrak or Greyhound stations.
Pennsylvania	PennDOT has funded several intermodal and transfer centers for local fixed route providers throughout the state, including locations in Harrisburg, Johnstown, and Williamsport. These facilities are ideal for intermodal connections between local fixed route, intercity bus, and passenger rail. Greyhound in particular, has made successful efforts to interline with Amtrak on the Pittsburgh-Johnstown-Harrisburg route.

Vermont	Regional providers are aware and charged with making connections where it makes sense.
Virginia	Yes. Partnered with VDOT to use two park and ride lots, and one multimodal center park and ride lot. Also collaborated closely with other local agencies to attempt to establish connections prior to implementation. Currently working with local transit agency to begin new service that will feed passengers from local system to intercity route nearby.
Washington	Coordination is legally binding, still a problem with intermodal center in Seattle. Greyhound had to build its own separate station in Seattle. All other Travel Washington routes connect at public intermodal centers.
Wisconsin	WisDOT requires proposers to indicate their coordinator with local and regional transit systems during the RFP process. WisDOT also inquires about this coordination on an as-needed basis.

As can be seen, there is no single model for Section 5311(f) programs, as the states have developed unique programs utilizing the flexibility of the federal program guidance. However, there are several programs to look at in more detail to develop options for Maryland and illustrate their feasibility.

Potential Models for Changes in the Maryland Program

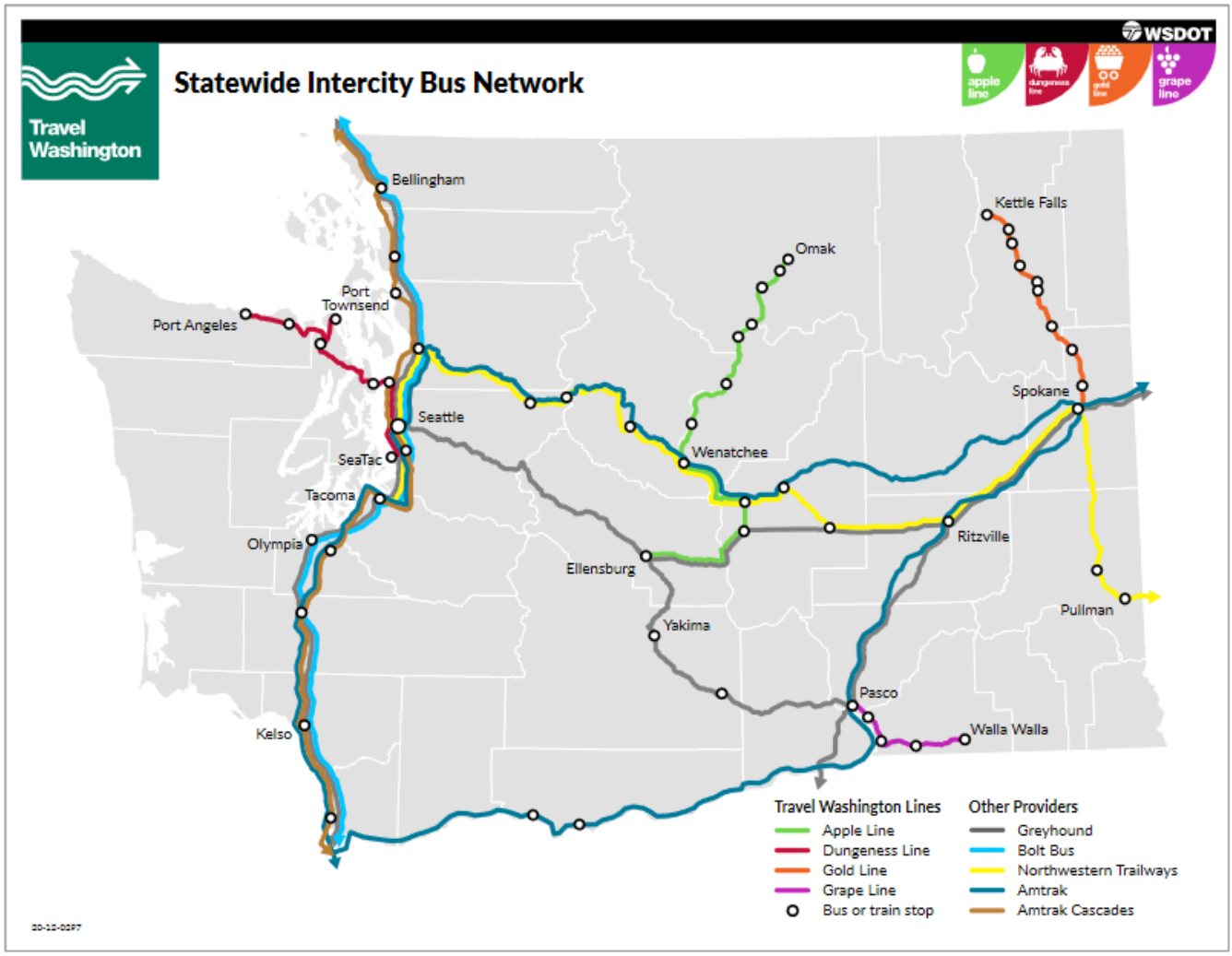
Travel Washington

A decade ago the Washington State Department of Transportation (WSDOT) conducted its first statewide intercity bus study to consider if there might be a better way to administer its Section 5311(f) funding. The existing model was an open grant solicitation, part of the state's consolidated grant program. Applicants could identify any service they wanted, and if eligible it could be funded. However, there were problems—grant recipients that were not meeting requirements and could not be defunded, services that were not really intercity, and remaining gaps where unsubsidized services were not viable but there were no applicants to provide intercity service. Also, during the course of the study changes in state law effectively eliminated the possibility of state or local match for intercity services.

The model that was developed has affected many of the subsequent state programs. The match issue was addressed with the development of the in-kind match concept using the value of unsubsidized connecting intercity bus service as match. With WSDOT support, this was initially accepted by FTA as a Pilot Project, and eventually was included in statute. The issue of non-responsive operators and gaps in the network was addressed by making the state the grant recipient, having the state identify gaps in the network, and then contract for service on those routes using third-party contractors. WSDOT realized that the riding public could be confused over time by changing contractors, and so decided to brand all the Section 5311(f) services under one name, Travel Washington. Each of the four separate routes would also have a unique name reflecting the economy or geography of the area, so the line from the

grape-growing region became the Grape Line, the line from the apple-growing region became the Apple Line, the line from the Olympic Peninsula became the Dungeness Line, etc. All four lines are interlined with existing national network services operated by Greyhound and Northwestern Trailways, are Amtrak Thruway services, and make connections at public intermodal terminals (except in Seattle) with local transit. All four routes are funded with FTA Section 5311(f) funding with no local or state match, only in-kind match from Greyhound.

Figure 2-2: Travel Washington Statewide Intercity Bus Network



The Dungeness Line

The Dungeness Line from Port Angeles to SeaTac International Airport is a potential example of the Washington model in a situation similar to Maryland's Eastern Shore. The route operates from Port Angeles on the Olympic Peninsula, serving a number of stops where it connects with local transit. The buses ride a ferry across Puget Sound and make stops in Seattle at several major medical facilities, the Greyhound station, King Street Amtrak Station and the airport. There are two roundtrips per day.

The service began as an airport shuttle service with as many as five roundtrips per day, but over time the private operator found that two roundtrips balanced cost and demand. Eventually maintaining that level of service required subsidy and the firm became a contractor to WSDOT under the Travel Washington program. It is the best performing of the four WSDOT routes. Fare levels are relatively high, more comparable to airport shuttle routes and the services are operated with small buses offering quality seating.

Two years ago the service was rebid, and Greyhound Lines won the bid. There were concerns because the service was a different model from typical large bus Greyhound service. Greyhound procured new small buses, adopted the Travel Washington Dungeness Line branding, and has continued to provide the desired Section 5311(f) service.

Maryland Takeaways:

- Branding: Creating a single statewide brand under the state program has created greater visibility for the program and provides continuity for users even if the contractor changes.
- Multiple Markets: By having stops serving medical trips, bus and rail stations, and the airport the Dungeness Line meets multiple needs and combines several types of potential rider, making the service cost-effective and meeting more needs.
- Greyhound Flexibility: Like the Greyhound service in Maryland on US 40, the Dungeness Line uses smaller buses appropriate to the markets. However unlike the Maryland example, Greyhound has branded the service as the Dungeness Line. Ticketing is still through Greyhound's ticketing system, and Greyhound's Bus Tracker system applies to the Dungeness Line buses as well—but it has its own website.

Virginia Breeze

In Virginia the reduction of scheduled intercity bus routes in the mid-2000's eventually led the state to perform an intercity bus study that identified gaps in the statewide network. The study recommended that the state's Department of Rail and Public Transportation (DRPT) institute an intercity bus program utilizing Section 5311(f) funding. The highest priority corridor was the I-81 corridor between Blacksburg, Virginia and Washington, D.C. The study recommended that DRPT become the grantee and issue an RFP for service in that corridor. The study also recommended that DRPT support the contracted service with its own separate contracted marketing program.

Contracted Service, State Branding

DRPT implemented the study by contracting with Dillon's Bus Lines of Maryland to operate the I-81 service, which was branded as Virginia Breeze. The service was implemented with three wrapped full-size Van Hool coaches. Dillon's is owned by Coach USA, which also operates the Megabus branded intercity services, and the in-kind match was provided by Megabus routes connecting in Washington, D.C. All seats are reserved, and the services uses the Megabus ticketing service. The service connects Blacksburg, Virginia (location of Virginia Tech) with Washington, D.C. with a number of intermediate stops and a single daily trip in each direction. In Washington it stops at Dulles Airport, the West Falls Church Metro Station, and the intercity bus deck in Union Station (enabling connections to Amtrak and intercity buses). This initial route was very successful, with a farebox recovery of up to 83 percent.

Subsequently, DRPT did a follow-up planning study, and following its recommendations has added two routes. Virginia Breeze has become the brand for all the DRPT services, and the original I-81 route is now branded as the Valley Flyer. A new, more rural route connecting Martinsville with Richmond via Danville is called the Capitol Connector, and the third route, the Piedmont Express links Danville with Washington, D.C. in the Route 29 corridor (via Lynchburg and Charlottesville). An RFP was issued for the new routes, and the contract awarded to Dillon's again. The contracts are two-year contracts with three one-year renewals possible. All buses are full-size coaches, with wi-fi and power outlets, wrapped in Virginia Breeze graphics. Figure 2-3 depicts the routes, and Exhibit 2-1 presents the wrapped bus.

Figure 2-3 Virginia Breeze Route Map

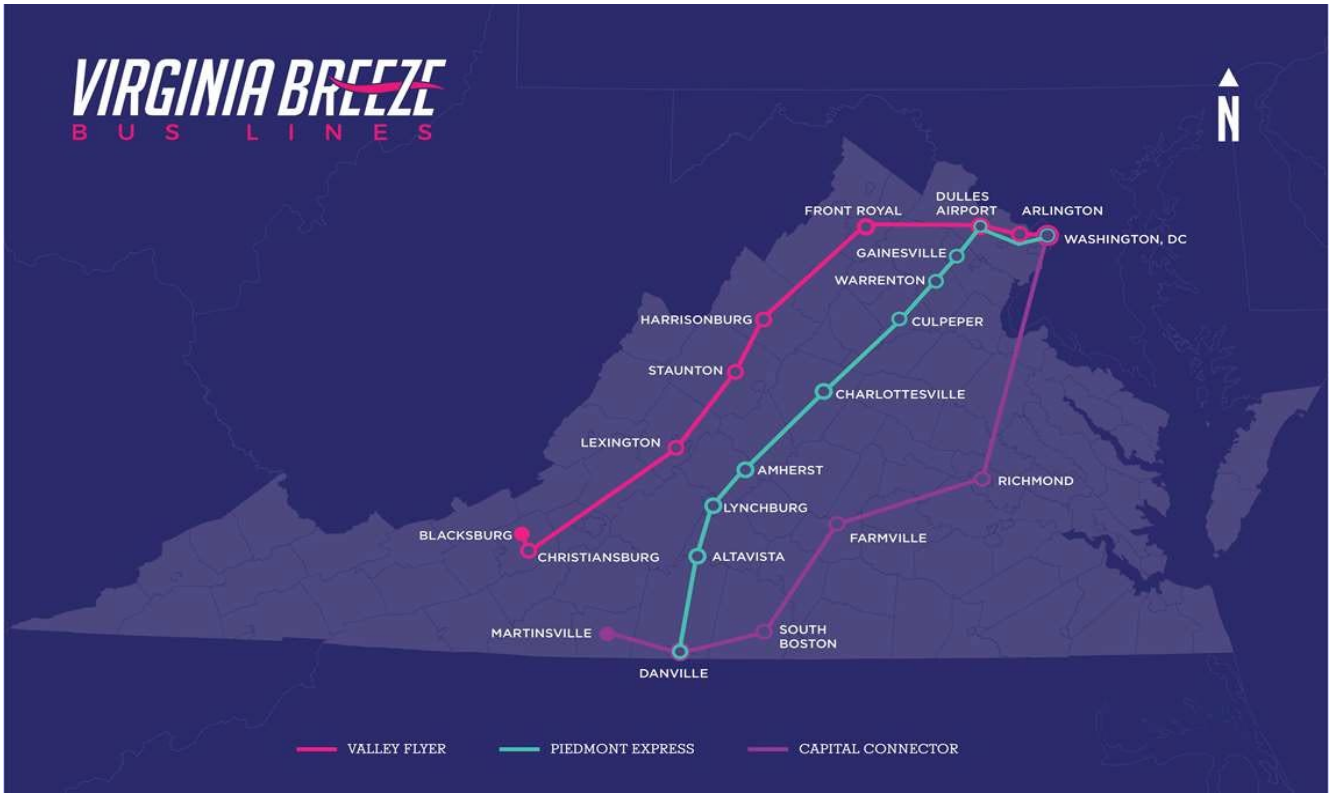


Exhibit 2-1 Virginia Breeze Branding on Wrapped Bus

Source: starexponent.com

The service has its own website, with links from the DRPT website. The ticketing button on the website takes the rider to a page linked to the Megabus ticketing system. Also, a search on the Megabus site for service to any of the Virginia Breeze destinations allows the purchase of a Virginia Breeze ticket. These is also a Virginia Breeze Facebook page with additional information. None of the Virginia Breeze services is also an Amtrak Thruway bus.

Maryland Takeaways:

- Contracted service: It was difficult for DRPT to change long-standing state policy to allow the state to contract for service with the state as the recipient and responsible operator. But it has provided a high degree of control over the service, and the ability to seek other providers if needed.

- Branding: The Virginia Breeze brand has been quite successful in making the service visible to the public as something new and distinct. It is not possible to say with any certainty how much the high ridership is due to the branding, but at least DRPT has had to address requests from other jurisdictions and regions seeking Virginia Breeze service (if only as an alternative to extensions of Amtrak service).

- Marketing: DRPT's separate marketing contract has been a part of the branding success in terms of the slick website, the bus wraps, the social media presence, the press releases and events. Bus companies typically do not specialize in these activities unless they are at the national level. DRPT staff meet regularly with the marketing team, working closely to promote the service.

- Connectivity: The success of the existing Virginia Breeze is undoubtedly a function of its connections to the Washington Metro (in northern Virginia and at Union Station), a major international airport (Dulles International Airport), and Union Station's Amtrak and intercity bus options.

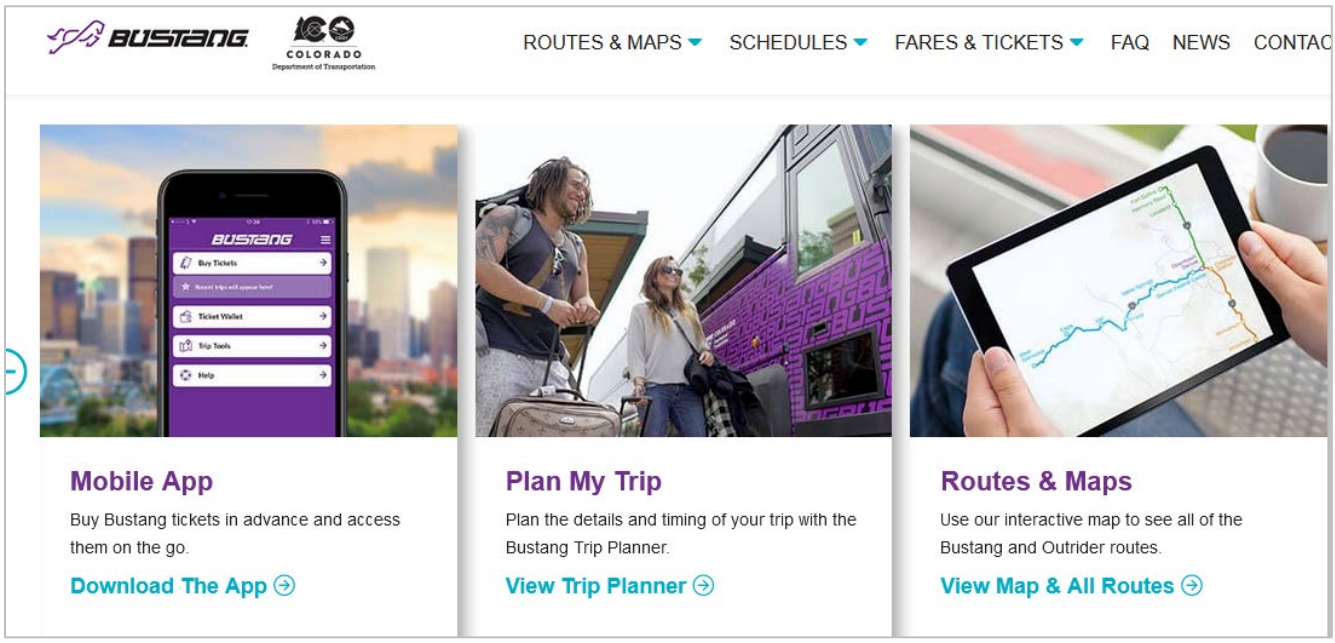
Bustang/Bustang Outrider— Colorado Department of Transportation

Another Section 5311(f) model that has been developed can be found in Colorado. Like many states Colorado at one time had several rural intercity routes operated by a subsidiary of Greyhound using Section 5311(f) funding. In the mid-2000's Greyhound withdrew from this contract, and areas of central Colorado were left with no connectivity to the state's major population centers or the national bus network. A series of planning efforts resulted in the development of new Section 5311(f) alternatives connecting central Colorado to Denver, and funding to maintain several other routes operated by private intercity carriers.

Bustang—Regional Commuter Bus

A 2014 study of regional and intercity bus needs for the Colorado Department of Transportation (CDOT) statewide identified both a need for commuter-type service into Denver from areas outside the Regional Transit District service area, and for additional rural connections. CDOT was able to use state funding to implement the commuter services in three corridors: Fort Collins to Denver; Colorado Springs to Denver; and Glenwood Springs to Denver. As in the case of other states, CDOT had never operated service itself, but in this case it issued an RFP and hired a contractor to operate these services. The state also hired marketing specialists, and the service known in the planning documents as the inter-regional express became Bustang, with a distinctive logo, a slick website, distinct buses with full amenities, and connections at Denver's Union Station. The service (pre-pandemic) was quite successful, and soon other parts of the state wanted "Bustang" service. Figure 2-4 demonstrates that Bustang riders can obtain information through an app, a trip-planner, and electronic map and schedule information.

Figure 2-4: Bustang User Information



Bustang Outrider

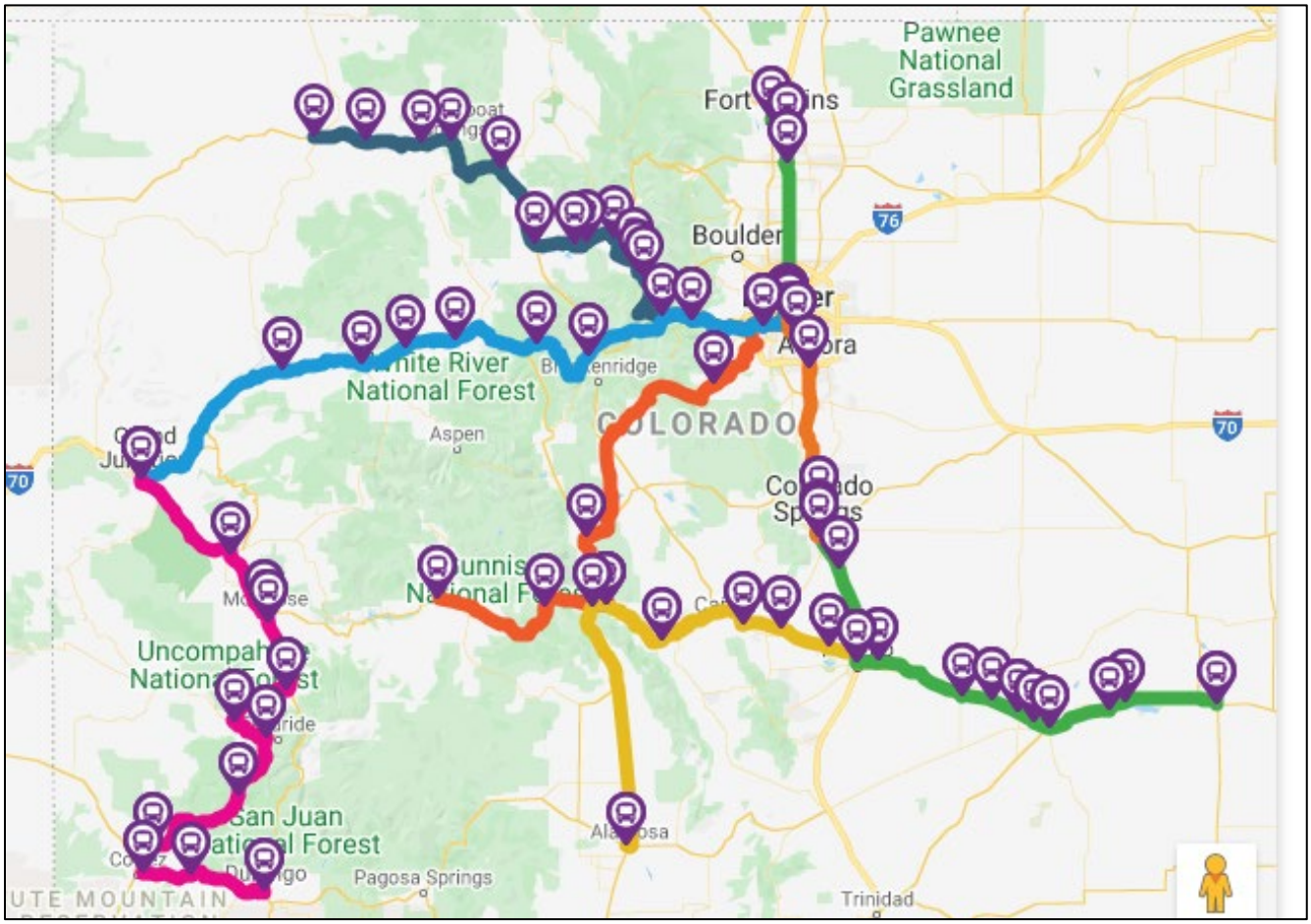
Outside the Denver region, CDOT had been using Section 5311(f) grants to support service operated by a number of carriers under their own names. Because of the success of Bustang, CDOT was facing pressure to expand that service, but none of the rural corridors had similar commuter markets. Instead they were the more typical one-round-trip-per-day rural intercity service. CDOT decided to issue new solicitations for its Section 5311(f) corridors. In one corridor, it used the funding to replace a Greyhound frequency previously funded on the US70 corridor with Bustang service. In the other Section 5311(f) corridors CDOT rebranded its Section 5311(f) service as Bustang Outrider, operated by different companies. CDOT provides the buses to the operators, with marketing, ticketing, and information through the same Bustang website and marketing contract. The service also added special trips for ski weekends (Snowstang), football games (Broncos Games) University Friday/Sunday services (Ramsroute)

More recently, CDOT has also added routes from smaller communities under the Bustang Outrider name, using smaller 35-foot intercity coaches. These are provided to the operator by CDOT, but for these more rural routes the operators are public agencies or private non-profits based in communities on the routes. Schedules on these routes are designed to make intercity connections but also to allow for a five-hour day in the nearest regional activity center to allow for medical, personal business and shopping needs to be met.

Statewide Network

This combined network of commuter routes, intercity routes and rural routes forms a statewide transit network funded with a combination of state, federal 5311(f), and fares, with match from Greyhound in-kind and toll credits. The network has connectivity with Greyhound through joint stops and interlining.

Figure 2-5: Bustang Network



Takeaways for Maryland:

Combining commuter, intercity and rural feeder routes under a single brand has created a public perception of a statewide transit network addressing a variety of needs that is much more visible than services operated and marketed by a number of different bus companies. With the separate brands and individual carrier marketing few people perceived that these services could actually be used as a cohesive network providing statewide access. The costs of marketing, the website, mobile ticketing, social media platforms, etc. is spread over all the services making them all visible to commuters, rural residents and in-bound travelers.

Connectivity of the network is a key goal met by ensuring that schedules meet to allow for transfers to buses heading for more distant locations. For example passengers on the line from Durango to Grand Junction can make a connection there for service to Denver; passengers from the Lamar Outrider line can meet a Bustang in Colorado Springs to reach Denver. In Denver Greyhound has now moved into Denver Union Station, which also has Amtrak and Bustang, along with connections to RTD light rail, commuter rail, Mall Shuttle and local bus.

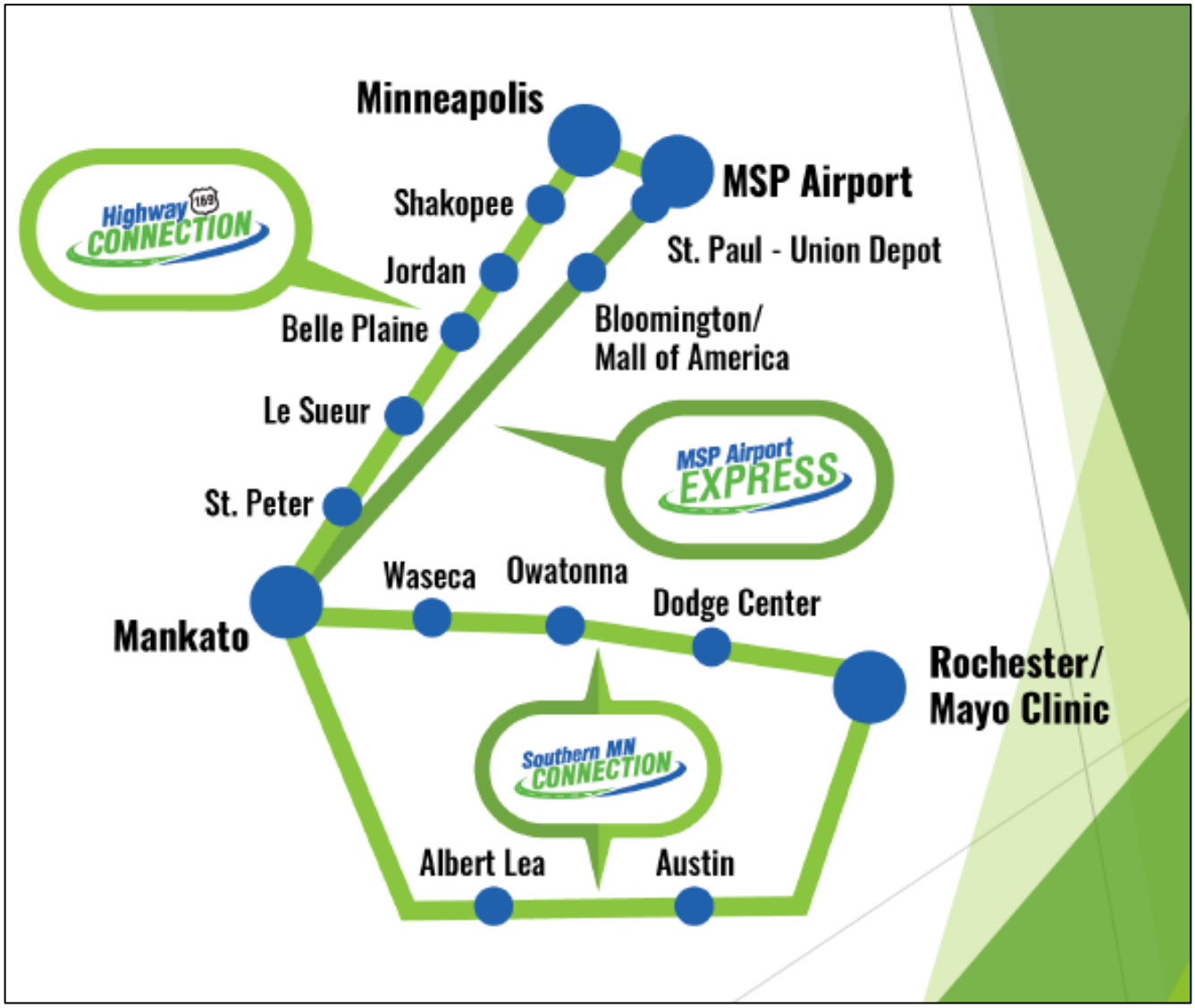
Mankato Land to Air Express—Minnesota Department of Transportation

The Minnesota Department of Transportation has been providing Section 5311(f) funding for rural intercity bus services since 1997. The funding is provided as a grant, with the local match provided with state dollars. There are three current grant recipients: Jefferson Lines, Mankato Land to Air Express, and Greyhound Lines. Mankato Land to Air (LtA) is owned by Jefferson Lines, but is a separate operating entity. Jefferson Lines provides most of the traditional intercity bus service in the state—LtA began as an airport shuttle similar to Bay Runner Shuttle in Maryland.

Airport Service and Rural Intercity Service in the Same Corridor

As can be seen in the map, Exhibit 2-2, LtA has developed a network that connects a number of small towns with both the Minneapolis-St. Paul Airport (MSP), and the major medical facilities at the Mayo Clinic in Rochester. Most of this service is unsubsidized, but one route was developed in response to identified needs for service from the smaller towns strung out on the old highway to the Twin Cities in addition to the express service to the Airport. This route was implemented as the Highway 169 Connection, and as a Section 5311(f) service it takes riders to the main Jefferson/ Greyhound station in Minneapolis rather than to the Airport.

Exhibit 2-2: Land to Air Express Routes



The Highway 169 Connection is two round-trips per day, plus a third that also goes to MSP Airport. It is a local service in that it has 8 (or 9 depending on the trip) intermediate stops. The ranges of fares is $5 to $15. This contrasts with the MSP Airport Express, which has only three intermediate stops, with fares between $15 and $30. The successful implementation of the Highway 169 Connection in the same corridor as the MSP Airport Express suggests that these services address different market segments and are complementary rather than duplicative. LtA operates its services with smaller vehicles, including lift-equipped 35' intercity coaches and the large passenger vans.

Takeaways for Maryland

Two Types of Service in the Same Corridor: Implementation of the Highway 169 Express in the same corridor as more express, higher-fare airport service provides a potential model for service on Maryland's Eastern Shore. Currently Bay Runner Shuttle provides five roundtrips per day, unsubsidized, between Ocean City and BWI, with fares that are much higher on a per-mile basis than typical intercity bus fares. Prior to the pandemic Greyhound also provided one round-trip per day between Baltimore and Salisbury (and University of Maryland Eastern Shore), with a connection to Ocean City provided by Shore Transit. Greyhound suspended its service during the pandemic and is planning to bring it back as ridership returns. Service connecting Baltimore to Salisbury/Ocean City is still a state priority, but if a state investment is needed to maintain it the success of the LtA services suggests that a low-fare service with more stops can co-exist or complement a high-fare, more express airport service through separate branding (even if operated by the same carrier).

Alternative Program Designs-Grants Versus Contracted Service

As can be seen there are a number of different models used by the states to implement this program. Maryland began its program under the grant model, but with some strategic direction in the solicitation to provide applicants with the state's priorities. The state does not provide more specific direction, such as stop locations or schedules, as it might if it had issued an RFP. The development of options in other states suggests that a look at the advantages and disadvantages of the basic models, to see if Maryland should make changes.

In general there are three basic models:

- Non-prescriptive grant, open solicitation,
- State as grantee, competitive RFP process for prescribed services, and
- Some combination.

These are discussed in more detail below.

Grant Model

Under the grant model Section 5311(f) funding is provided to grantees selected as part of an open grant solicitation. This may be part of a state's overall Section 5311 grant solicitation, or a separate Section 5311(f) solicitation. The applicants must develop projects that meet the Section 5311(f) requirements, but the routes, frequencies, stop locations, ticketing, branding, and marketing are all defined by the operator. Some states limit these solicitations to private for-profit carriers, others are open to private non-profit and public entities. Examples of this type of grant solicitation include the programs in Minnesota, Texas and Indiana.

Benefits of this approach include:

- Consistency with the other state grant program processes, including solicitation cycles, contract agreements, invoicing, and compliance—though often states find that variations or exceptions are needed to deal with this different type of grantee.
- It works well providing funding to maintain an existing intercity service that has become unprofitable and is in danger of abandonment, or whose frequency has dropped below the desired level. It does not require a cessation of service with a potential change of operator or introduce competitive concerns or service duplication. Depending on the grant, it may provide support to the entire network rather than specific routes—for example the Iowa program that provides a set amount per mile for all qualified intercity bus operations in the state.
- This approach works well if there is a satisfactory ongoing relationship between the DOT and the operator(s), and if the services form a cohesive network.
- Also, as demonstrated by recent events around the CARES Act, if an emergency requires that additional funding be directed to maintain or enhance services, it is easier to add scope or funding to a grant than for the state to conduct a full competitive procurement.
- Finally, some states have found it easier to coordinate grants providing interstate services—they can agree on the oversight responsibilities and how to split the costs for an ongoing service operated by a single provider that is a grant recipient.

Issues with this model, as noted above, include:

- Applicants may not be applying for services that complement or connect with the unsubsidized network to address unmet needs—it leaves the definition of the unmet needs in the hands of the applicant.

- It can be difficult to change grantees in the event that there is a failure to perform or meet FTA or other requirements—grant programs are typically set up as relationships between governments.
- Some states have felt that it removes the provider's incentive to keep costs in line and provide quality service.
- In addition, the state is left with the need to sort out multiple applications that may have overlapping services, or that duplicate existing unsubsidized services.

Grant with State Identified Project Priorities

Some states have continued to use the grant process to fund Section 5311(f) services but have defined particular services that are needed as part of the solicitation. Colorado DOT followed this approach for a number of years, issuing separate grant solicitations for services between Denver and Gunnison, Denver and the Utah state line (service to Salt Lake) and Denver to the Kansas state line—each with particular routes and stops to address unmet rural needs. Maryland has also used this approach, identifying priority corridors in the application, but allowing for applicants to make the case for other services that they might identify.

In general, this approach is an effort to allow the state to have strategic direction over the use of these funds, but keep management of the program together with the other transit grant programs rather than involving contract procurement offices and procedures that can affect grant cycles, grants management and compliance oversight requirements that are common to all the transit grant programs.

State as Grantee, RFP for Prescribed Services

This is basically the model developed originally by Washington State. The state is the grantee for the Section 5311(f) funds, and it develops requests for proposals for qualified intercity operators to provide the services called for in the RFP scope of services. The model has since been applied in a number of states. Utah implemented its program under this model. and the new Virginia Breeze program implemented by the Virginia Department of Rail and Public Transportation (DRPT) has followed the model, including the common state branding for the subsidized routes.

Major benefits of this approach include:

- Limited Section 5311(f) funding is focused on providing services in areas that are not served by the unsubsidized network,
- The state can include requirements on connections, ticketing, marketing, etc. including branding.
- Another benefit is that the contractors are competing for contracts and renewal, creating competitive pressures on cost and service quality. The contract fixes the term and rates, and the term is limited to a maximum of five years.

- Compliance requirements for third-party contractors may be less than for grantees though many federal requirements do get passed to contractors. But oversight may be less involved for a contractor. Contractor bids and subsequent invoices are usually based on carrier rates per fully allocated cost-per-mile times the number of miles operated on the route, less the revenue. This contrasts with the typical grant requirement for a line item budget, which can be hard to monitor when many elements are jointly provided with the contractor's unsubsidized services.

As always, there are some issues with this approach. These include:

- Implementation of this model may require a significant policy change at the state level from being a provider of grants to an operator of services with overall responsibility for their contractors. State DOT procurement offices may not be familiar with the concept of contracting for services.

- Another issue is that the model was initially developed to implement services in areas that were unserved by the unsubsidized intercity network, and the model works well in that situation. But if a state is addressing low levels of service on a route that is served by an existing unsubsidized carrier, the carrier will not want to see the state seek to contract for a subsidized (higher) level of service that may be provided by a competitor. Colorado has faced a similar situation with its desire to add service between Denver and Grand Junction, already served by Greyhound, and Virginia has as well when portions of state-funded routes overlap unsubsidized service.

- The pandemic has also revealed a significant issue with the contract model in that many states using this model were unable to direct additional funding from relief programs to contractors. Contract regulations requiring a re-bid for substantial changes of scope or funding meant that funding could not be provided except through new contracts requiring a significant amount of time delay and the potential for disrupting the network. Issues with this process can be seen in Wisconsin, where intercity carriers sought funds under the CARES Act for routes already under contract—but the DOT could only provide funding through a new competitively-let contract (under this model), forcing the carriers to bid to operate their own routes.

- A third issue is in competitive procurement for a route that operates in more than one state, where one state is subsidizing and the other not, or they are each subsidizing under separate contracts with different rates and terms. This creates the possibility that a carrier may drop a service if they lose the bid in any of the states served.

- Finally, the possibility exists that there is no private provider interested in bidding on a rural route that has low frequency due to low demand and has no garage facility at terminal points—in which case a different solution is needed.

Mixed Models-Avoiding the Issues

Because of this last issue, some states are finding a need for a mixed model, in which some of the Section 5311(f) funding is used to contract for services to fill gaps in the network, and some portion is set-aside to provide grants to local or regional transit providers to provide feeder services that connect but may

only be feasible at low frequencies or on schedules that are designed to carry other types of trips such as medical or employment.

Oregon was the first to combine these models, issuing RFPs for intercity bus route segments that are otherwise unserved (which are all branded as POINT service), while soliciting separate discretionary grants for more regional services that will still connect but meet more regional needs. Colorado has now done the same thing by adding Bustang Outrider services—some are provided by private contractors in response to an RFP, but in other cases the state has provided operating grants (and buses) to local rural transit organizations to provide service from low demand rural areas to activity centers and connections to the broader network. This model was included in Ohio's intercity bus plan as an alternative to a costly service using coaches.

One issue with the mixed approach is that it may require state operating match and/or purchase of dedicated vehicles for the discretionary intercity services provided under grants. If a state has been relying completely on in-kind match for its program, this would represent a change with some financial costs. Typically private carriers providing in-kind match miles have requirements of their own to participate—Greyhound will only provide miles for services that operate at least five days per week, connecting within a two-hour window of their schedules. For low ridership rural areas less than daily service may be appropriate, and it may be necessary to have schedules that not only offer the connection to the intercity network but service other markets.

Recommendations Regarding Maryland's Program

Although MDOT MTA has significant experience in contracting for service for its commuter bus program, given the high degree of uncertainty going forward, at least in the near-term it would seem prudent to continue the grant model already in place to avoid potential interruptions in service during a shift to an RFP model. Based on the examination of needs in this study, the state's strategic priorities continue to include service from the Baltimore and Washington areas to the far western and eastern portions of the state but defining the scope of services for one or more RFPs is difficult without knowing how much service will return as travel resumes. Clearly it will be necessary to manage the funding sources over time as ridership returns—which is likely to be easier for the state under a grant situation which has flexibility in the scope of the grant. The other factor is that within MDOT MTA, Section 5311 grant funding is provided to the Office of Local Transit Support (OLTS), which oversees the grants management and compliance aspects of the program, while the contracted commuter bus program is separate. There could be additional management issues for the commuter bus program trying to manage contracts funded by Section 5311 that are otherwise overseen by OLTS.

Within the continued framework of a grant, however, MDOT MTA could be more specific about the desired services, for example specifying stops and stop locations to support improved connectivity with local transit or park and ride opportunities or specifying schedules in more detail. MDOT MTA could also address branding (if desired), and amenities (such as bicycle racks, wi-fi, power outlets—along with ADA accessibility. It should be recognized that some requirements might well require a higher level of funding.

Maryland Intercity Bus Study Update

Chapter 3: Maryland's Intercity Bus Network

Introduction

This chapter presents an inventory of Maryland's existing intercity bus services. Additionally, intercity rail passenger routes and commuter bus routes that operate through the state are identified. It should be noted that the intercity bus industry's ridership has been severely affected by the reduction in travel due to the COVID-19 pandemic, and carriers have either reduced or suspended services in response to the loss of ridership. This inventory reflects the best information available about pre-COVID services as well as information about the current status of services as of February 2021.

The intercity bus operators that serve Maryland's non-urbanized and urbanized cities were identified from carrier and third-party websites, including the U.S. DOT National Intercity Bus Atlas. Information collected included timetables, cities served, and web links to the route operator. Greyhound's internal Revenue Support website provides current Greyhound timetable information, and was used to identify the Greyhound timetables, schedules, routes and stops in Maryland. Finally, Amtrak provides intercity service on a number of routes in Maryland, including connection Amtrak Thruway services, so the Amtrak national timetables and Amtrak staff were consulted to include these Amtrak services.

MDOT MTA Commuter Bus program information was obtained from the MDOT MTA websites. MDOT MTA websites do not provide any information about Maryland's Section 5311(f)-funded intercity bus program, so potential passengers obtain their service ticketing information from the carrier websites.

Service Types

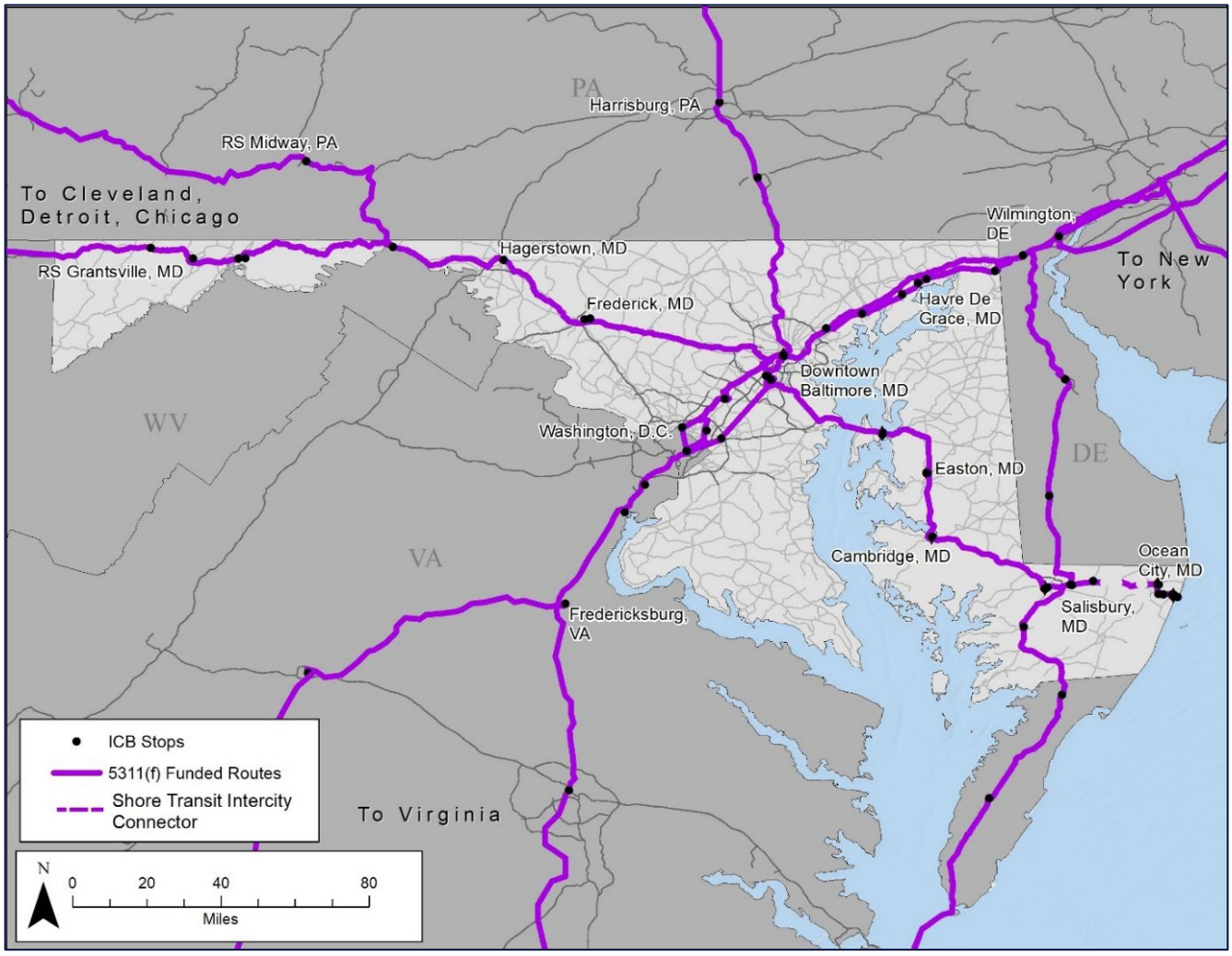
While most Maryland residents are probably familiar with the traditional type of intercity bus services provided by Greyhound (and Trailways in the past), over the past decade another type of intercity bus service has developed, known as curbside services. These are independent carriers that do not utilize stations or terminals (the name "curbside" is derived from their use of the street side pickup and drop off points). These carriers typically have their own websites and ticketing (or use third party sites). Third party sites and individual firm websites identified from web searches were used to identify such services in Maryland. It should be noted that this industry is fairly volatile, with carriers entering and exiting the business, or changing stops, schedules and fares.

Based on a review of the two MDOT MTA databases, Greyhound's website, Amtrak timetables and other carrier websites, five types of "intercity" bus services were identified as potentially providing inter-regional connectivity in the state:

1. **Traditional (Legacy) Intercity Bus** – Greyhound Lines Incorporated
2. **Scheduled Shuttle Service -** BayRunner Shuttle
3. **Long Distance "Curbside" Intercity Bus** – Megabus, Flixbus, Vamoose (DC Trails)
4. **Long Distance Commuter Bus** – MTA Commuter Bus, Rabbit Transit
5. **Rural Feeder -** Local public transit operator with interline ticketing/information and shared stop locals—Shore Transit Salisbury - Ocean City

Two routes in Maryland are subsidized by the MDOT MTA section 5311(f) rural intercity bus program. One route is operated by legacy carrier Greyhound Lines, and the other is operated by airport shuttle provider BayRunner Shuttle. Figure 3-1 presents a map of the combined network.

Figure 3-1: Current Maryland Intercity Bus Network



Legacy Carriers

"Legacy" carriers are those that provide intercity bus service using the traditional business model that includes:

- Fixed route, fixed schedule service, with intermediate stops (including both non-urbanized and urbanized locations on many routes).
- Use of terminals (either company affiliated agencies or terminals, or public intermodal) as pickup and drop off points.
- Availability of interline ticketing and coordinated connecting schedules, providing schedule information about connecting bus services and allowing passengers to purchase a single ticket/fare that can be used on other carriers.

Greyhound continues to be the major provider of intercity bus service in Maryland, and is the only national intercity bus carrier, connecting non-urbanized and urbanized cities throughout the United States. Peter Pan Bus Lines is another carrier in this category that provides service in Maryland.

Greyhound Lines

Greyhound Lines was purchased by FlixMobility GMBH, the parent company of Flixbus USA, on October 21, 2021. The previous owners, FirstGroup PLC of the United Kingdom, had put Greyhound for sale as part of their sale of North American assets. At the moment Greyhound is being operated as a separate operating company following its traditional business model and with its own branding, website, etc. Greyhound continues to be a member of the National Bus Traffic Association (NBTA), which is the national clearinghouse for interline ticketing. Through these arrangements, member carriers can sell single tickets that provide for travel on the services of other member carriers. Greyhound service is distinguished by the fact that it has designated stops with terminals or commission agencies, many staffed by agents who sell tickets, handle bus package express, and provide information. This is contrasted with "curbside" operators which are discussed in a subsequent section. Greyhound has been moving its stops into public intermodal terminal facilities wherever possible and shifting ticketing into online platforms.

Information about Greyhound services is available through several sources: on their website https://www.greyhound.com/, through their telephone information system, and at staff station ticket counters in key locations. Greyhound is currently responding to competition from long distance "curbside" intercity bus express operators by providing Greyhound Express service between major points within its network. Greyhound Express offers few intermediate stops in smaller towns, and buses are equipped with Wi-Fi, plug-in power outlets, and leather seating.

Fare Categories and Ticketing

In another effort to remain competitive, Greyhound offers three fare categories each available online and in terminals. The main difference is that the online fares may be the least expensive, and passengers can reserve a seat (not a designated seat, but the seat capacity). The terminal Flexible fare only permits one free checked bag, rather than the two permitted if you buy your ticket online. Table 3-1 displays the conditions of the three fare categories.

Table 3-1: Greyhound Fare Categories

Economy	Economy Extra	Flexible
1 checked bag free (2nd and 3rd bags $20 each)	1 checked bag free (2nd and 3rd bags $20 each)	2 checked bags free (3rd bag $20)
Non- refundable	Non- refundable	Refundable
$20 fee to change date/time before trip	$20 fee to change date/time before trip	No fee to change date/time before trip date
Earn 1 road reward point each way	Earn 2 road reward points each way	Earn 3 road reward points each way
-	Priority boarding	Priority boarding
-	Free same day exchange	Free same day exchange

Source: Greyhound website, 2021

The actual fare for a given trip varies for the three ticket types, and can also vary by status of the purchaser, with special fares for students, veterans/active military, and groups of ten or more. Also, Greyhound's ticketing system practices yield management similar to the airlines, such that prices are higher for tickets bought just before a trip, or on trips with high demand. For example, the website says for lowest fares one should book online or with the app, travel on a Tuesday or Wednesday, or book at least seven days in advance.

That said, an example of typical fares was developed by looking at a trip from Baltimore to Pittsburgh, 11 days out, returning a week later. The one-way Economy fare of $47 is approximately $0.19 per mile, the Economy Extra fare of $64 is $0.26 per mile, and the Flexible fare of $80 is approximately $0.32 per mile.

Greyhound offers four ways to pay for and obtain a ticket. Online ticket purchases can be paid for with a credit card, cash or Sezzle. If using cash, a customer can put a hold on the tickets and then pay in cash at a Seven-Eleven or ACE Cash Express. With a credit card an online purchaser can purchase an E-Ticket allowing the use of the smartphone for boarding, or print the ticket, or collect the ticket at a bus station. Sezzle is an option that allows the rider to buy now and pay later with an interest-free payment plan, potentially spreading the cost out with 25 percent down and up to three payments. Purchasing a ticket at a station can be done with cash, check or credit card. There is also a phone credit card option, with a $20 fee. Greyhound is now providing its E-Ticket option nationwide, allow a user to purchase the ticket on the phone and then use the phone as a boarding pass.

Station Stop Categories

Table 3-2 presents the basic categories of station stops used by Greyhound for its Maryland stops. Greyhound defines three basic types of stops: Greyhound station stops, partner station stops, and curbside stops. A fourth type is the rest stop, but these are not generally boarding and alighting locations. Boltbus was Greyhound's curbside express service brand, and a few Maryland stops were listed as Boltbus only. Boltbus service is currently suspended due to the COVID-19 pandemic and Boltbus customers are being directed to the remaining Greyhound services. It is not clear if Boltbus services will ever be resumed.

Table 3-2: Greyhound Station Stops by Type

City	Address	Zip Code	Stop Type
Aberdeen	18 W Bel Air	21001	Curbside
Baltimore	2110 Haines Street	21230	Station
Baltimore	1578 Maryland Avenue	21201	Boltbus stop
Cambridge	100 Heron Boulevard	21613	Bus stop in resort/hotel
College Park	4931 Calvert Road	20742	Curbside
Cumberland	12401 Willowbrook Road	21502	Bus stop at college
Cumberland	201 E Harrison Street	21502	Bus stop at Amtrak station
Easton	29137 Newnam Road	21601	Airport
Edgewood	1712 Pulaski Hwy	21040	Bus stop at gas station
Elkton	732 E Pulaski Hwy	21921	Curbside
Frederick	100 S Street	21701	Bus station
Havre De Grace	911 Ontario Street	21078	7-Eleven
Hyattsville	4700 Garden City Drive	20785	Metro stop
Laurel	605 7th Street	20707	7-Eleven
North East	1 E Cecil Avenue	21901	Stop & Go
Nottingham	8476 Honeygo Boulevard	21236	Park and Ride
Perryville	5404 Pulaski Hwy	21903	Curbside
Princess Anne	1 College Backbone Road	21853	Bus stop at college
Salisbury	31901 Tri County Way	21804	Shore Transit bus stop
Silver Spring	8100 Fenton Street	20910	Bus stop

Source: Greyhound website, 2020

ADA Accessibility

Because Greyhound is classified by the federal government as a large (Class I) operator of over-the-road coaches all vehicles must be fully wheelchair accessible as required in Part 38 of the Americans with Disabilities Act. This includes vehicles operating the service on shown on Greyhound's Table 123 schedule, which is funded with Federal Transit Administration (FTA) Section 5311(f) funding. This funding source requires that all vehicles operated on the funded service be fully accessible—even though Greyhound operates small coaches on this route they are lift-equipped and fully compliant.

Greyhound Maryland Routes

Greyhound routes in Maryland include services from Baltimore and Washington to Salisbury (Figure 3-2), services to the west from Baltimore and Washington (Figure 3-3), and frequent services on slightly different routes in the Washington-Baltimore region as part of a number of routes operating through the state on services beginning and ending outside the state (Figure 3-4).

The following sections describe these services. They are presented based on the Greyhound timetable numbers associated with each route or service pattern. Note that different timetable numbers may include services in the same corridor—generally the fact that it is a different timetable means that there is a different pattern of stops.

Figure 3-2: Greyhound Pre-Pandemic Eastern Shore Routes and Connections

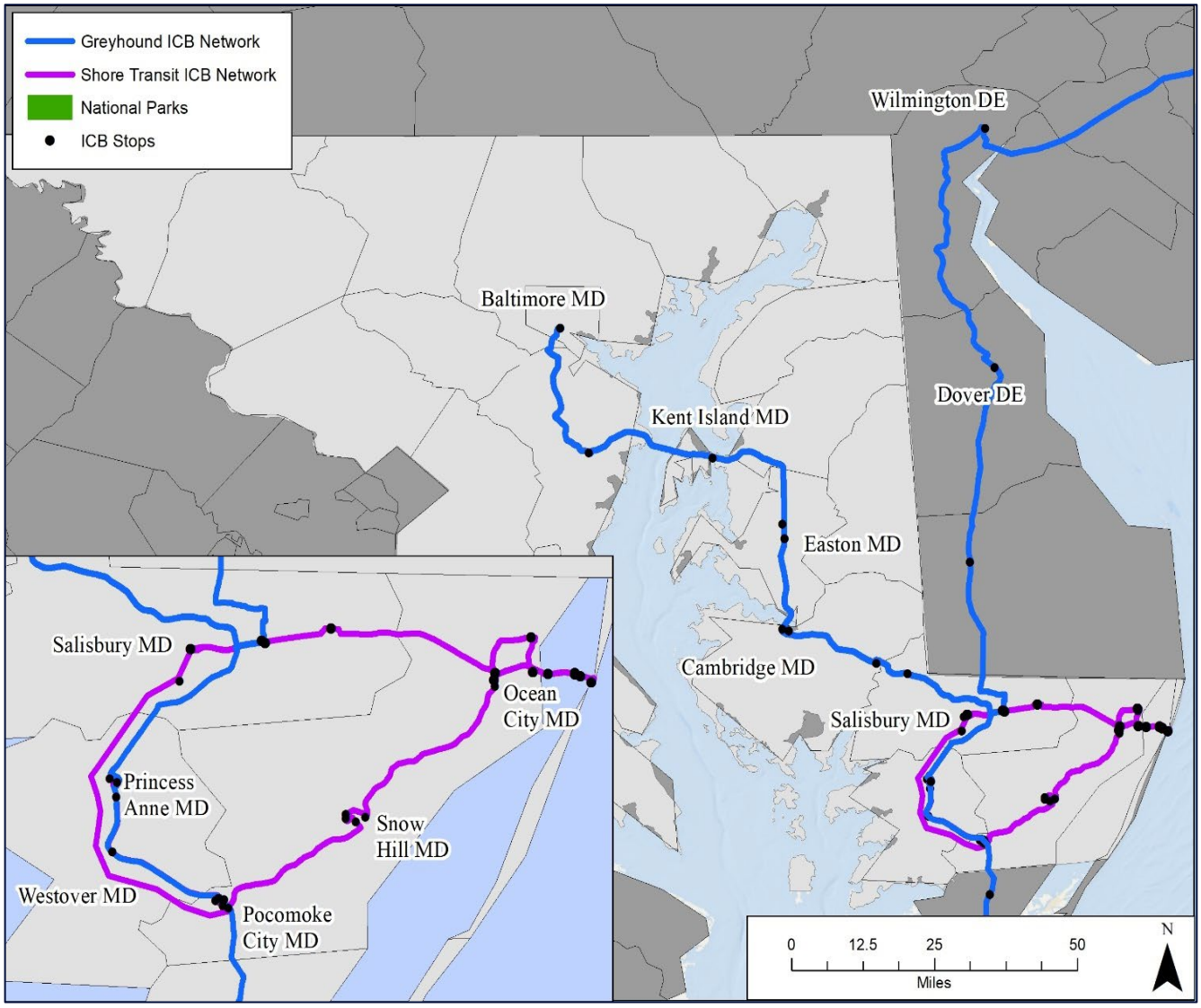


Figure 3-3: Greyhound Western Maryland Routes

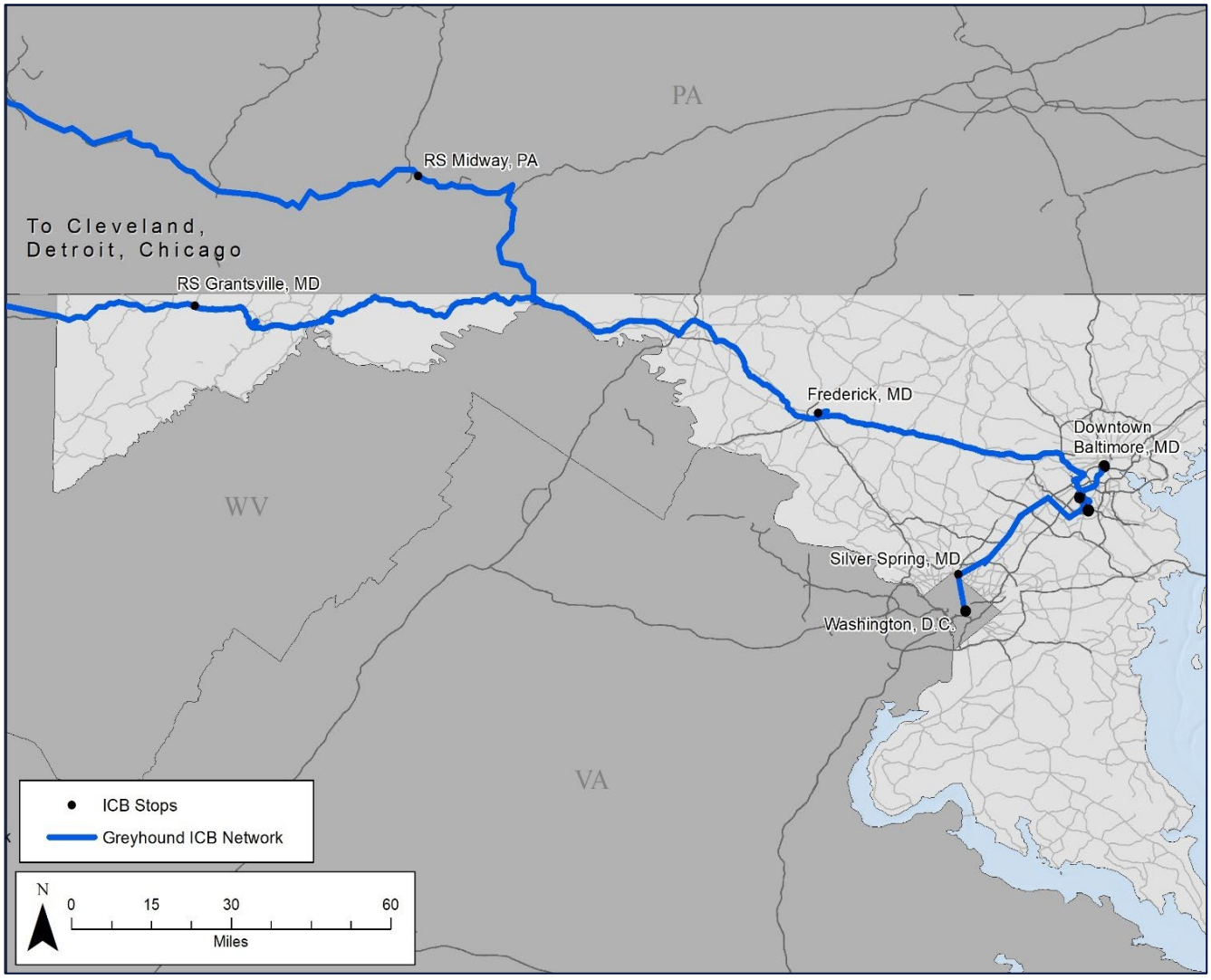
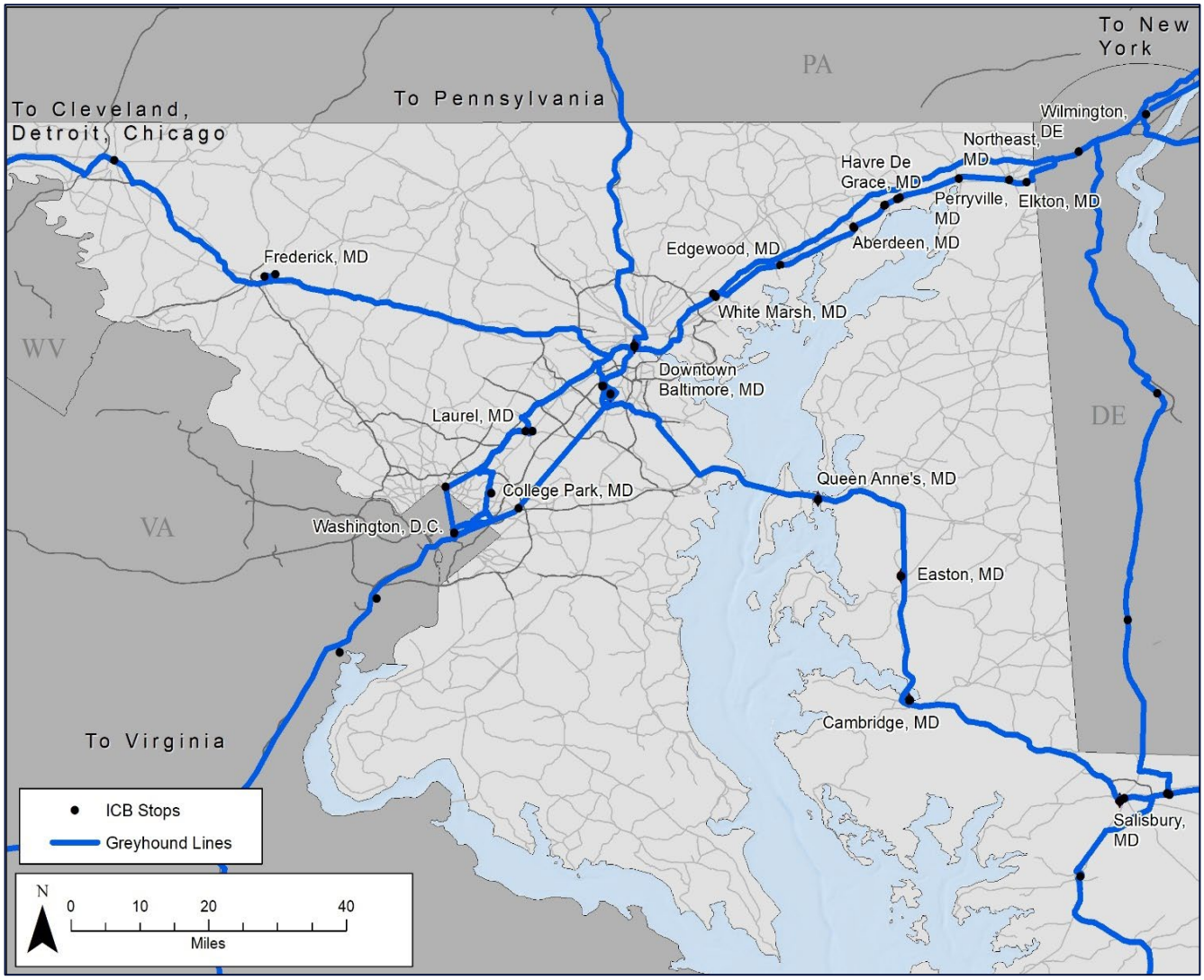


Figure 3-4: Greyhound Central Maryland Routes



Greyhound Table 96: Washington - Philadelphia – Baltimore – New Jersey

Serves Washington, Baltimore, Philadelphia, and Atlantic City, New Jersey. Prior to April 2020 this route offered two round trips per day between Atlantic City, New Jersey; Philadelphia, Pennsylvania; Baltimore, Maryland; and Washington, D.C. (with an additional three round trips between the New Jersey shore and Philadelphia). One of the Atlantic City to Washington D.C. trips also stopped in Silver Spring, and the other stopped in New Carrollton. Service was suspended during the pandemic, but as of December 1, 2021, there are two daily round trips following the previous schedule pattern.

Greyhound Table 106: Washington – Baltimore – New Jersey – Connecticut - Boston

Serves Boston to Washington, D.C. Pre-COVID this route offered three daily round trips between Washington, D.C., and Boston, with a stop in Baltimore. As of as of December 1, 2021, this timetable shows one round trip per day between Philadelphia and Boston, with no service to Baltimore and Washington, D.C.

Greyhound Table 122: Richmond – Washington – Baltimore

Prior to the pandemic, this route offered nine southbound and eleven northbound daily trips between Philadelphia and Richmond, Virginia, all of which stopped in Baltimore—plus an additional two daily Baltimore-Richmond round trips. One of the southbound trips stopped at New Carrollton, and three of the northbound trips stopped at Silver Spring. As of as of December 1, 2021, this timetable shows four southbound daily trips stopping in Baltimore and Washington, D.C., and two northbound trips. One trip each way stops in Silver Spring.

Greyhound Table 123: Washington – Baltimore - Wilmington

Serves Wilmington, Delaware to Washington, D.C. Only a single trip a day in each direction is offered, with no service on Tuesdays and Wednesdays. The northbound trip is offered in the morning, while the southbound trip is offered early afternoon. The route serves ten stops in Maryland: College Park, Laurel, Baltimore, White Marsh, Edgewood, Aberdeen, Havre de Grace, Perryville, North East, and Elkton. This service is funded by MDOT MTA under the Section 5311(f) program. See Figure 3-4 for the route map and its stops. This service has continued to operate throughout the COVID-19 pandemic.

Greyhound Table 126: Washington – Baltimore – Wilmington – Newark – New York

Serves New York to Washington, D.C. Before the pandemic this route offered nine southbound and northbound trips linking the northeast with Baltimore and Washington, D.C. Four of the southbound trips stopped in Silver Spring, and two stopped at New Carrollton. Northbound four trips stopped in Silver Spring, and one stopped at New Carrollton.

As of as of December 1, 2021 this route offers five southbound daily round trips that link Baltimore and Washington, D.C. One of the southbound trips makes a stop in New Carrollton at the Metro. Northbound there are only three daily trips, with additional Maryland stops, one in Silver Spring and two schedules stopping in New Carrollton.

Greyhound Table 127: Washington – Silver Spring – New York

Serves New York to Washington, D.C. As of January 2020, prior to the COVID-19 pandemic, this route offered ten daily southbound and eight northbound trips One of the southbound trips stopped in Silver Spring, and three stopped in New Carrollton. Four of the northbound trips stopped in New Carrollton, none stopped in Silver Spring. These schedules all operated express to New York with no Baltimore stops.

As of as of December 1, 2021, there is no service from this timetable being operated.

Greyhound Table 143: Baltimore – Washington – Virginia

As of January 2020, this route between Baltimore and Charlottesville, VA, provided two daily round trips, one in the morning and one in the evening. However, the evening westbound trip did not run Monday and Tuesday and the morning eastbound trip did not run on Tuesday and Wednesday.

As of as of December 1, 2021 there is no service on this route—in fact the timetable has been removed from the Greyhound national timetable book.

Greyhound Table 174: Washington – Baltimore – Harrisburg

In January 2020 this route between Washington, D.C. and Harrisburg, PA provided four southbound trips and three northbound trips. All trips stopped in downtown Baltimore at the Greyhound station.

As of as of December 1, 2021 there is one round-trip on this schedule, operating daily except Tuesdays and Wednesdays.

Greyhound Table 200: Washington – Baltimore – Cleveland – Detroit - Chicago

Prior to the COVID pandemic, this route linked Washington, D.C., Cleveland, Detroit, and Chicago. Four daily round trips stopped in Baltimore. Of the four westbound trips, two made stops in Silver Spring, one stopped in New Carrollton, two made stops in Frederick, and one stopped in Grantsville. On the eastbound trips one stopped in Grantsville, four stopped in Baltimore, three stopped in New Carrollton, and one in Silver Spring.

As of as of December 1, 2021 there are two daily round trips between Washington, D.C., and Chicago, with stops in Baltimore both ways. Westbound it also stops in Silver Spring and Frederick, eastbound it stops in Frederick and New Carrollton.

Greyhound Table 420: Norfolk – Eastern Shore – Baltimore – New York

Serves Norfolk, the Eastern Shore, Baltimore and New York. Only a single daily round trip operated from Baltimore to Norfolk via Maryland's Eastern Shore with stops in Annapolis, Easton, Cambridge, Vienna, Mardela Springs, Salisbury and the University of Maryland Eastern Shore. In April 2020, Greyhound eliminated the Baltimore connection, and the only service was a single daily round trip between New York and Norfolk, stopping in Maryland in Salisbury and at the University of Maryland Eastern Shore. As of as of December 1, 2021, this is still the situation; it is not clear if Greyhound will resume the connection between Baltimore and Salisbury.

Peter Pan Bus Lines

Another legacy carrier potentially serving Maryland residents is Peter Pan Bus Lines. Peter Pan offers scheduled service from Washington, D.C. north to New York and Boston. Maryland stops include Silver Spring and Baltimore. In Silver Spring the Peter Pan stop is in the Silver Spring Transit Center, which is the bus terminal adjacent to the Metrorail station. Peter Pan buses depart from Bay 224. In Baltimore Peter Pan Buses use Gate 1 at the Greyhound station on Haines Street.

There are no archived timetables for Peter Pan service prior to the COVID-19 pandemic. Currently Peter Pan is running minimal service, there are three schedules a day from Silver Spring, each with a stop in Baltimore. Two of the schedules require a transfer to another bus in Baltimore. There are two daily round-trip schedules from the Greenbelt Metro station to New York, with a transfer required in Baltimore. There are four express schedules from Baltimore to New York and return.

Intercity Shuttle Service: BayRunner Shuttle

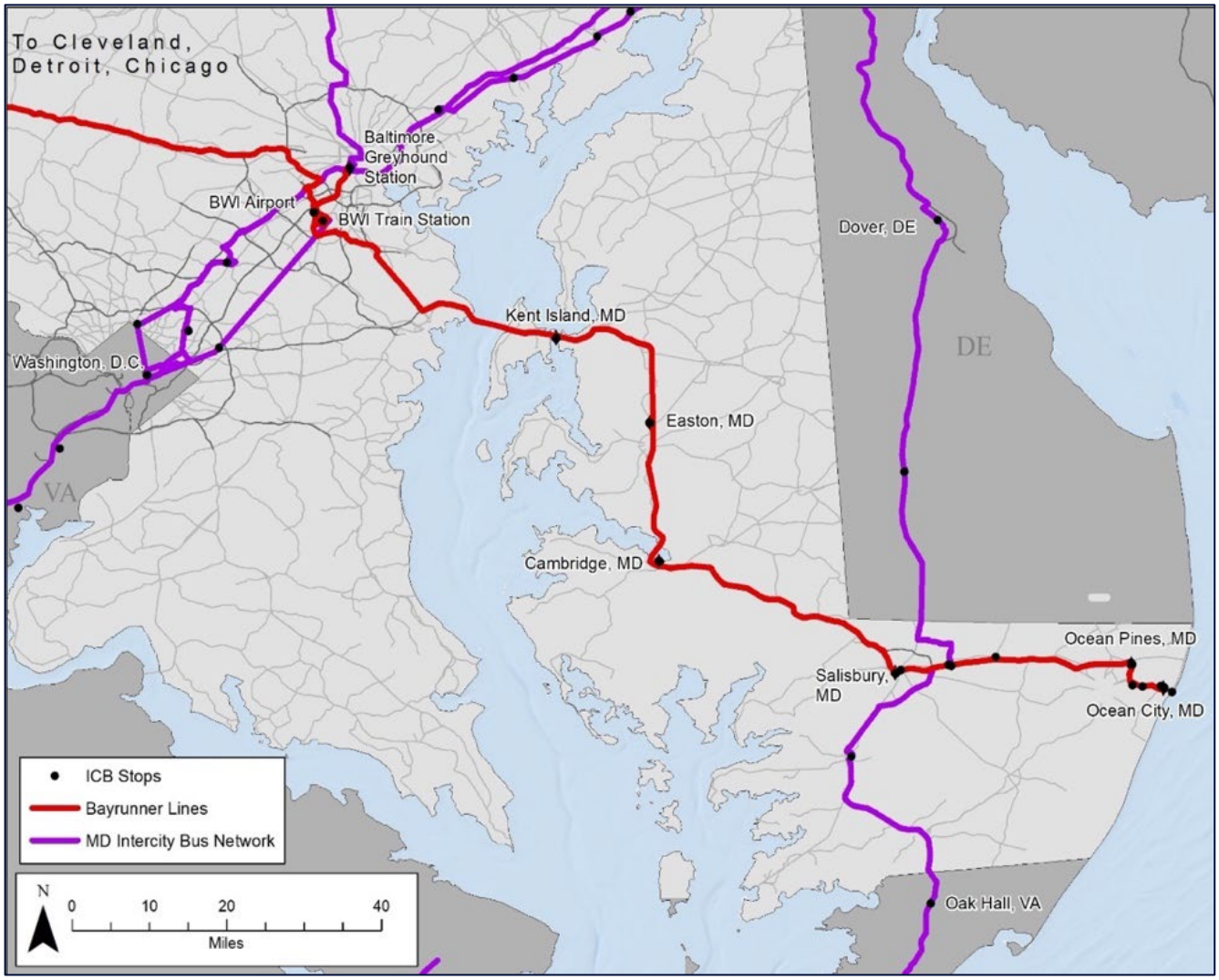
BayRunner Shuttle is a Maryland-based firm that describes itself as a shuttle that also offers intercity service between all of its stop locations. The firm operates services on two routes that connect in the Baltimore region, as can be seen in Figure 3-5. All stops, east and west, are interline stops with Greyhound and Amtrak, and tickets can be purchased on from either, as well as from BayRunner directly.

Baltimore and East—Ocean City

The Baltimore and East Route connects Baltimore-Washington Thurgood Marshall Airport (BWI) to Ocean City, with stops at the main airport terminal, BWI Train Station (offering connections to Amtrak and MARC commuter rail service), Baltimore Greyhound Station (offering connections to Greyhound bus services), Kent Island (Hilton Garden Inn), Easton (Easton Airport terminal), Cambridge (Hyatt Regency hotel and 100), Salisbury (BayRunner Shuttle corporate headquarters in downtown), Ocean Pines (Rite Aid pharmacy in Berlin), and Ocean City (West Ocean City Park and Ride).

Currently (January 2022) there are four daily round trips (and one late scheduled on this route, four schedules are highlighted as connecting the Eastern Shore to the Baltimore Greyhound Station. Before the COVID pandemic BayRunner operated seven daily round trips. Advance reservations are required and services or stops may not be operated if there are no reservations requiring it. If a passenger calls in the morning they can be told which ones are running that day. The current timetable is available at the BayRunner website, https://bayrunnershuttle.com/. Table 3-3 presents current Eastern Shore weekday schedules. The website does not specify how far in advance reservations must be made, but cancellations must be made at least 24 hours in advance to obtain a refund or credit (minus a $10 cancellation fee)—which implies that the minimum advance reservation is more than 24 hours.

Figure 3-5: BayRunner Shuttle Routes – Eastbound and Westbound



Eastbound

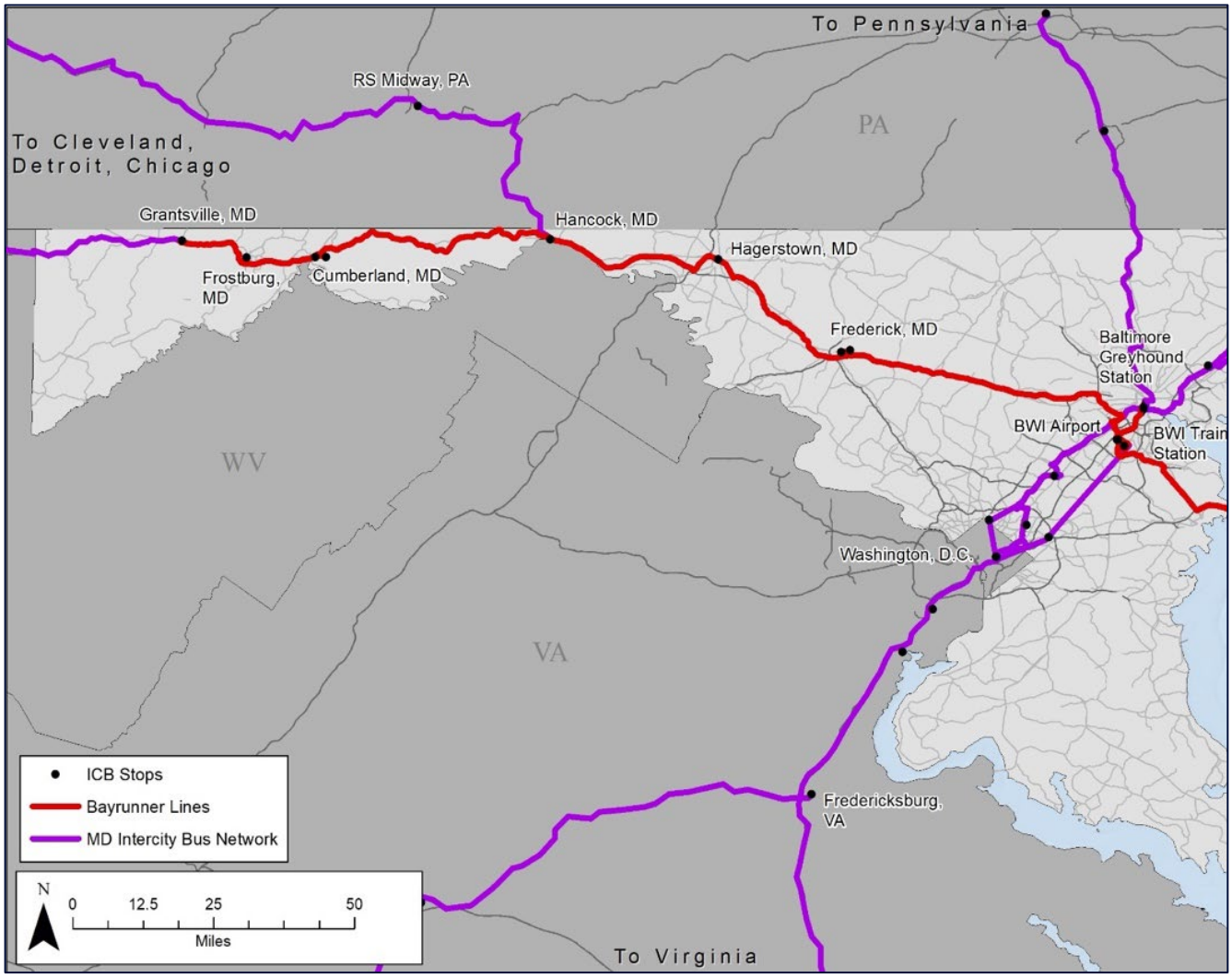

To Pennsylvania
RS Midway, PA
PA
To Cleveland,
Detroit, Chicago
Grantsville, MD
Hancock, MD
Hagerstown, MD
Frostburg,
MD
Cumberland, MD
Frederick, MD
Baltimore
Greyhound
Station
BWI Airport
BWI Train
Station
WV
Washington, D.C.
VA
ICB Stops
Bayrunner Lines
MD Intercity Bus Network
N
0
12.5
25
50
Miles
Fredericksburg,
VA
To Virginia

Table 3-3: BayRunner Shuttle Baltimore - East Thruway Timetable (as of December 2021)

Read Down ***Read Up***

Amtrak Thruway Bus Number								Amtrak Thruway Bus Number				
8112	8114	8118	8120	Arrive Depart	Location	City Code	Arrive Depart	8111	8113	8115	8119	8121
Days of Operation												
Daily	Daily	Daily	Daily					Daily	Daily	Daily	Daily	Daily
8:10	10:10	**2:10**	**4:10**	Dp	*Ocean City*	*OCM*	Ar	**1:55**	3:55	**5:55**	**9:55**	**11:55**
8:30	10:30	**2:30**	**4:30**	Dp	*Ocean Pines*	*OCP*	Ar	**1:35**	3:35	**5:35**	**9:35**	**11:35**
9:20	11:20	**3:20**	**5:20**	Dp	*Salisbury*	*SLS*	Ar	**12:45**	2:45	**4:45**	**8:45**	**10:45**
10:00	**12:00**	**4:00**	**6:00**	Dp	*Cambridge*	*CDE*	Ar	**12:00**	2:00	**4:00**	**8:00**	**10:00**
10:30	**12:30**	**4:30**	**6:30**	Dp	*Easton (Airport)*	*ESN*	Ar	11:40	1:40	**3:40**	**7:40**	**9:40**
10:55	**12:55**	**4:55**	**6:55**	Dp	*Kent Island*	*KNT*	Ar	11:20	1:20	**3:20**	**7:20**	**9:20**
11:30	**1:30**	**5:30**	**7:30**	Ar	*BWI Rail Station*	*BWI*	Dp	10:40	12:40	**2:40**	**6:40**	**8:40**
12:00	**2:00**	**6:00**	**8:00**	Ar	*Baltimore Greyhound Station*		Dp		**12:10**	**2:10**	**6:10**	**8:10**

***PM times in BOLD**
Source: https://bayrunnershuttle.com/

Baltimore and West-Grantsville

The Baltimore and West operates from the same Baltimore stops at BWI Main Terminal, BWI Train Station, and the Baltimore Greyhound Station. Additional stops, in order of the trip west include Frederick (Transit Center, Airport and BayRunner Shuttle offices), Hagerstown (Washington County Transit Transfer Center), Hancock (Hancock Truck Plaza), Cumberland (Allegany College and Cumberland Amtrak Station), Frostburg (Frostburg State University), and Grantsville (Pilot Travel Center).

This route is subsidized by MDOT MTA with Section 5311(f) rural intercity bus funding. Operating statistics are presented later in this memorandum. Currently BayRunner operates two daily round trips on this route as required by the grant agreement. Advance reservations are encouraged, but not required passengers can walk-up and pay cash on the day of travel, if space is available.

Table 3-4: BayRunner Shuttle Timetable—Baltimore-Grantsville (December 2021)

Read Down			*Read Up*	
Sun-Fri & Sat	**Sun-Fri only**	**Location**	**Sun-Fri & Sat**	**Sun-Fri only**
8:30	**4:30**	Grantsville	**3:15**	**11:15**
8:50	**4:50**	Frostburg	**2:55**	**10:50**
9:10/9:20	**5:10/5:20**	Cumberland Amtrak/ACM	**2:25/2:35**	**10:25/10:35**
10:05	**6:05**	Hancock	**1:40**	**9:40**
10:40	**6:40**	Hagerstown	**1:05**	**9:05**
11:15/11:30	**7:15/7:30**	Frederick Transit/Airport	**12:20/12:30**	**8:20/8:30**
12:20	**8:20**	Baltimore Greyhound	11:30	**7:30**
12:30/12:40	**8:45/8:50**	BWI Airport/BWI Rail Station	11:00/11:05	**7:00/7:05**

*__PM times in BOLD__
Source: https://bayrunnershuttle.com/

Fares

Ticketing

BayRunner Shuttle passengers can purchase their tickets directly from BayRunner shuttle online or at BayRunner offices. All trips must be paid before boarding. In addition, BayRunner offers interline ticketing with both Greyhound and Amtrak—for both the east and west routes.

Greyhound Interline Ticketing

BayRunner Shuttle routes from Baltimore to both the east and the west offer ticketing through www.greyhound.com/, Greyhound's ticketing system (except for Ocean City and Ocean Pines). On the web the BayRunner service is sold as if it is part of the Greyhound system, so a passenger can purchase the BayRunner ticket from Baltimore to any point on either the western or eastern route, and those destinations are available to any Greyhound passenger coming from another place. For example, a passenger desiring a trip from Richmond to Frostburg can purchase that ticket on Greyhound, but they will change from a Greyhound bus to a BayRunner Shuttle vehicle at the Greyhound station in Baltimore. Because the eastern BayRunner services are reservation only, Greyhound removes the ticketing option the day before travel if the BayRunner Shuttle is cancelled.

Amtrak Interline Ticketing—Amtrak Thruway

BayRunner Shuttle is also an Amtrak Thruway provider. This means that BayRunner services all included in Amtrak's ticketing and reservation system. For example, passengers can purchase an Amtrak ticket

from New York (or any Amtrak station) to Ocean City. Because the eastern BayRunner services are reservation only, Amtrak closes reservations with a BayRunner segment 15-18 hours before the trip, so Amtrak can be sure that BayRunner will operate the trip.

The services are of two types: interlined and dedicated. Interlined services are services that in addition to serving connecting Amtrak passengers, also serve passengers of the operating carrier who may not be connecting to rail service on the same ticket. These interlined services may not wait for late trains because they operate on the schedule of the operating carrier. Dedicated Amtrak Thruway services carry only passengers holding Amtrak tickets, and they wait to make guaranteed connections with the trains. Amtrak Thruway schedules and ticketing for both types of service are included in Amtrak's national reservation and ticketing system. All of these Amtrak Thruway services require an Amtrak ticket with an associated rail travel segment.

Payment

BayRunner Shuttle accepts credit cards and cash at the time of reservation. All passengers must pay prior to taking the trip. Persons purchasing a trip through the Greyhound or Amtrak websites must make payments as required by those partner firms.

Pricing

BayRunner Shuttle fares are more typical of airport shuttle services than intercity bus trips. Examples include the fare from BWI to Grantsville, which is $70 or $0.42 per mile, or BWI to Ocean City which is $111 or $0.81 per mile. The fare from BWI to Salisbury is somewhat lower at $73, which is $0.67 per mile. These fares are all for a single traveler—BayRunner offers discounted fares for two or more riders booking at the same time. It should be noted that many BayRunner stops offer free parking.

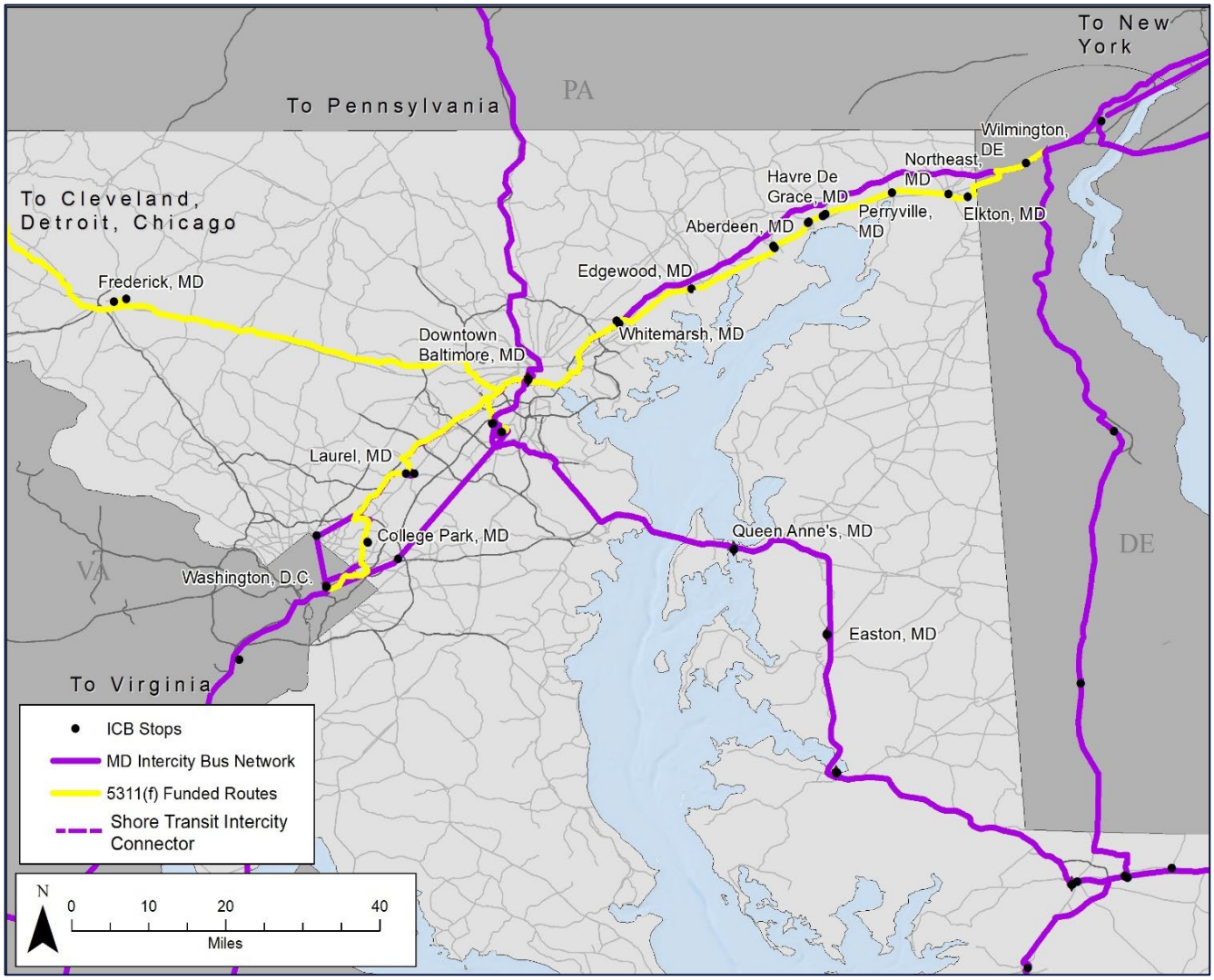
ADA Access

BayRunner Shuttle's fleet consists of vans rather than intercity coaches. On the Baltimore East route, the fact that the service requires a reservation and is not fixed schedule means that under the ADA it can require persons with disabilities needing an accessible vehicle to make a reservation, and it will provide the appropriate accessible vehicle for that person's trip. This provision of accessible service on with advance reservation is permitted for private providers of demand response services as long as it meets the standards for equivalent service. On BayRunner's website the same requirements apply on the Baltimore-West route, but this is potentially an issue on that route, as there are additional requirements related to federal funding and in-kind match. To meet these requirements BayRunner has procured two accessible vehicles. The accessible vehicle is taller than BayRunner Shuttle's non-accessible vans, and so it cannot use the same pickup point at the airport because of clearance issues on the ramps leading to its location on top of the short-term parking structure. The accessible vehicle also requires a longer (15-minute) dwell time for a lift deployment, and it carries less than the 15 passengers of the non-accessible vans in the fleet.

Rural Intercity Bus—Section 5311(f) Funded Service

As noted in the previous section, MDOT MTA utilizes its 15 percent set-aside from its Section 5311 state allocation to provide operating assistance to two of the routes included in the inventory above. These routes were identified in the previous 2010 Maryland Intercity Bus Study, MTA solicited applications and selected BayRunner Shuttle to operate between Baltimore and Grantsville, and Greyhound to operate local service between the Maryland/Washington, D.C. line and the Delaware state line using U.S. Route 1 and Route 40. Greyhound provides the connections to Union Station in Washington, D.C. and Wilmington, Delaware. Figure 3-6 presents a map showing which segments of the network are funded by MDOT MTA.

Figure 3-6: Maryland's Section 5311(f) Routes



The western Maryland BayRunner Shuttle operates two round trips per day, and the Greyhound central Maryland makes one-round trip per day. They both stop at the Baltimore Greyhound Station on Haines Street, allowing a connection. Greyhound provides the in-kind match for the BayRunner route, and it offers interline ticketing with Greyhound and the schedules appear in the Greyhound website.

BayRunner Shuttle-Baltimore West Route

Section 5311(f) funding is provided for the single route from Baltimore, MD to Grantsville, MD (Baltimore & West. The Baltimore & West routes stops include Grantsville, Frostburg, Cumberland, Hancock, Hagerstown, Frederick, BWI (Train Station and main terminal parking deck), and Baltimore's Greyhound Station. Ticketing is either through the BayRunner Shuttle website or Greyhound.com. BayRunner uses its accessible small bus on this route, as shown in Figure 3-7. The other vehicles in the fleet are either Chevy 3500 or Ford Transit vans, utilizing a trailer if needed for luggage. They do not have a lift and are not ADA accessible.

Figure 3-7: ADA Accessible BayRunner Vehicle

An issue related to use of Section 5311(f) funding on the Baltimore West route is the FTA requirement for an ADA accessible vehicle. BayRunner Shuttle is required to have an accessible vehicle on all services because the service is funded by FTA Section 5311(f), and because Greyhound is providing the in-kind match and is an interline partner and it requires full ADA accessibility. One issue is that BayRunner's business model relies on not having to use drivers who have Commercial Driver's Licenses (CDLs), which are required if the passenger vehicle is designed to carry more than 16 passengers (including the driver). Drivers with CDLs are able to command a higher wage rate. The FTA Section 5311(f) program requires that vehicles meet the Part 38 requirements for accessibility, i.e., have a wheelchair lift or ramp and one wheelchair securement positions if less than 22 feet in length, or two securement positions if over 22 feet. Section 5311(f) also requires that it have baggage space.

MDOT MTA has been working with BayRunner to obtain accessible vehicle(s) for this route, and one was ordered as soon as the grant was approved and it has been placed in service. A second vehicle is being procured. Full accessibility will likely require more such vehicles. A major issue has been identification of a vehicle below the CDL size thresholds that has enough passenger seating to be economically viable when equipped with baggage space and accessibility features. The requirements call for at least two securement locations and devices to be provided on vehicles in excess of 22 feet in length; or at least one securement location and device on vehicles 22 feet in length or less.

Table 3-5 presents operating, financial and performance statistics for this route for calendar 2019. This period was chosen because it represents the last full year of operation prior to the COVID-19 pandemic, and therefore is representative of the potential performance of this route. In reviewing these figures note that BayRunner operated this service twice a day each way.

Table 3-5: BayRunner Calendar 2019 Operating and Financial Statistics

Operating Month	Billed Amount (MDOT-MTA Subsidy)	Bus Miles Operated (Subsidy Route only)	Passenger Revenue	Operating Expense	Revenue Per Mile (Farebox)	Cost per Mile (Subsidy Route)	Trip Count	Passenger Count	Boardings Per Trip	Farebox Recovery	Subsidy Per Passenger
January	$24,814.00	19,426	$14,564.00	$39,378.00	$0.75	$2.03	116	662	5.71	36.99%	$37.48
Feb	$23,890.00	17,416	$15,129.00	$39,019.00	$0.87	$2.24	104	654	6.29	38.77%	$36.53
March	$22,450.00	19,090	$16,410.00	$38,860.00	$0.86	$2.04	114	858	7.53	42.23%	$26.17
April	$25,949.00	18,754	$14,888.00	$40,837.00	$0.79	$2.18	112	900	8.04	36.46%	$28.83
May	$25,834.00	19,426	$14,770.00	$40,604.00	$0.76	$2.09	116	792	6.83	36.38%	$32.62
June	$25,433.00	13,018	$14,690.00	$40,123.00	$1.13	$3.08	110	738	6.71	36.61%	$34.46
July	$23,144.00	19,426	$16,055.00	$39,199.00	$0.83	$2.02	116	846	7.29	40.96%	$27.36
August	$23,217.00	19,090	$16,094.00	$39,311.00	$0.84	$2.06	114	848	7.44	40.94%	$27.38
September	$23,188.00	18,754	$15,992.00	$39,180.00	$0.85	$2.09	112	840	7.50	40.82%	$27.60
October	$21,400.00	19,426	$17,196.00	$38,596.00	$0.89	$1.99	116	974	8.40	44.55%	$21.97
November	$20,729.00	18,082	$17,457.00	$38,186.00	$0.97	$2.11	108	1,128	10.44	45.72%	$18.38
December	$20,579.00	19,090	$18,078.00	$38,657.00	$0.95	$2.02	114	1,106	9.70	46.77%	$18.61
Total	$280,627.00	220,998	$191,323.00	$471,950.00	$0.87	$2.14	1,352	10,346	7.65	40.54%	$27.12

Source: MDOT-MTA Invoices

Greyhound Table 123 Washington, D.C. – Wilmington

FTA Section 5311(f) Funding is also used to provide local service on a route from Washington, D.C. to Wilmington, DE, which is operated by Greyhound. The stops include Washington, D.C., College Park, Laurel, downtown Baltimore, White Marsh, Edgewood, Aberdeen, Havre De Grace, Perryville, Northeast, Elkton, and Wilmington, DE. Greyhound provides its own in-kind match for this service.

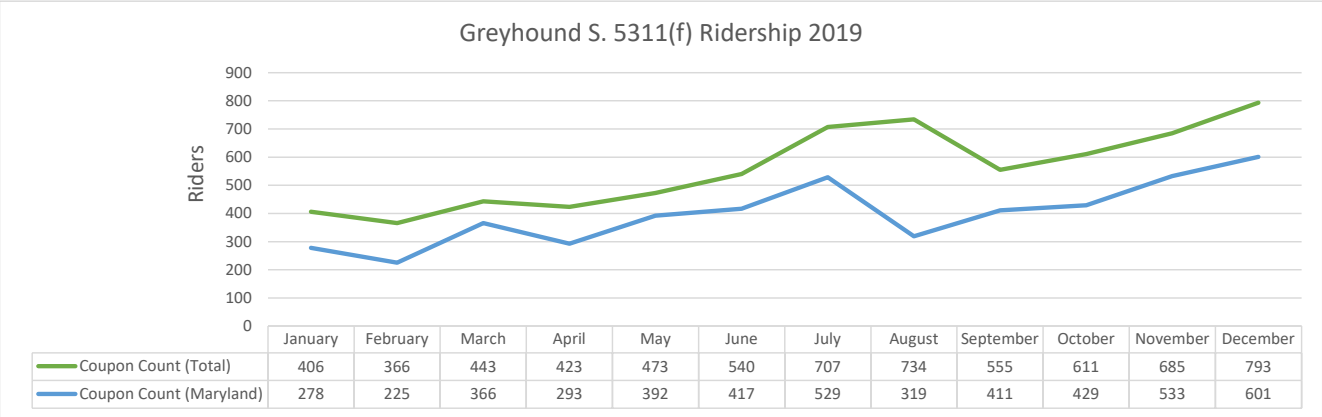
Greyhound formerly used smaller, heavy-duty body-on-chassis buses on this route, with seats for 24, a wheelchair lift and two securement spaces, and a separate baggage area accessed at the rear of the bus. These buses had no restroom. Greyhound has now incorporated this service into schedules that continue from Wilmington to New York City northbound, and start in New York City southbound. This extended route uses full-size over-the-road coaches (as shown in Figure 3-8) that are restroom equipped and fully accessible. The buses are equipped with Wi-Fi.

Figure 3-8: Greyhound Vehicle

Table 3-6 presents operating, financial and performance statistics for this route based on the company's invoices to MDOT MTA for calendar year 2019. This period was chosen because it represents the last full year of operation prior to the COVID-19 pandemic, and therefore is representative of the potential performance of this route prior to the pandemic. In reviewing these figures note that Greyhound operated this service once a day each way.

Greyhound has pointed out that the passenger counts do not include those passengers boarding outside of the funded Maryland segment of this route, and that it actually carries more ridership than is shown in the table. For example, passengers boarding in Washington, D.C. but alighting in Laurel, or Aberdeen or Elkton are not included in these counts. Additional ridership data supplied by Greyhound was used to construct Figure 3-9 which reflects the additional ridership on the route from passengers boarding outside Maryland. The total ridership is 6,736 rather than the 4,793 reported on the invoices.

Figure 3-9: Greyhound Table 123 Ridership—Total and Maryland Section 5311(f) Segment



	January	February	March	April	May	June	July	August	September	October	November	December
Coupon Count (Total)	406	366	443	423	473	540	707	734	555	611	685	793
Coupon Count (Maryland)	278	225	366	293	392	417	529	319	411	429	533	601

Table 3-6: Greyhound Calendar Year 2019 Operating and Financial Statistics

Operating Month	Billed Amount (MDOT-MTA Subsidy)	Bus Miles Operated (Subsidy Route only)	Passenger Revenue	Operating Expense	**Revenue Per Mile (Farebox)**	**Cost Per Mile (Subsidy Route)**	Trip Count	Passenger Count	Boardings per Trip	Farebox Recovery	Subsidy per Passenger
January	$27,368.83	5,952	$2,272.13	$29,640.96	$0.38	$4.98	124	278	2.24	7.67%	$98.45
February	$24,261.02	5,122	$2,014.84	$26,275.86	$0.39	$5.12	106	225	2.12	7.67%	$107.83
March	$25,688.07	5,952	$2,702.97	$28,391.04	$0.45	$4.77	124	366	2.95	9.52%	$70.19
April	$26,112.67	5,760	$2,975.33	$29,088.00	$0.52	$5.04	120	293	2.44	10.23%	$89.12
May	$25,667.53	5,856	$3,553.91	$29,221.44	$0.61	$4.99	122	392	3.21	12.16%	$65.48
June	$23,850.61	5,760	$2,990.99	$26,841.60	$0.52	$4.66	120	417	3.48	11.14%	$57.20
July	$22,959.32	5,760	$3,651.88	$26,611.20	$0.63	$4.63	120	529	4.41	13.72%	$43.40
August	$24,995.16	5,952	$3,336.36	$28,331.52	$0.56	$4.77	124	319	2.57	11.78%	$78.35
September	$24,194.67	5,729	$2,788.92	$26,983.59	$0.49	$4.71	119	411	3.45	10.34%	$58.87
October	$26,328.30	5,952	$3,431.70	$29,760.00	$0.58	$4.98	124	429	3.46	11.53%	$61.37
November	$25,598.11	5,760	$4,065.89	$29,664.00	$0.71	$5.15	120	533	4.44	13.71%	$48.03
December	$23,885.27	5,921	$4,535.53	$28,420.80	$0.77	$4.82	123	601	4.89	15.96%	$39.74
Total	$225,097.88	69,476	$38,320.45	$339,230.01	$0.55	$4.88	1,446	4,793	3.31	11.30%	$46.96

Source: MDOT-MTA and Greyhound Lines

Section 5311(f) Conclusions

These two routes/services both provide some connections that are not available from other providers. The BayRunner western route links western Maryland to Baltimore, BWI Airport and the national intercity bus and passenger rail networks. There is MDOT MTA commuter bus service from Hagerstown and Frederick to Washington, D.C. that is peak-hour, peak-direction only, and does not connect to Union Station; previously there was one Greyhound bus per day each way that also stopped in Grantsville going to and from Morgantown, West Virginia. However, it did not stop in Hagerstown, Cumberland or Frostburg, and it has been suspended at this time.

The Greyhound Section 5311(f) local does serve a number of stops that are reachable by other modes during commute hours, but no other service provides the linkages north of Perryville to northeast, Elkton and Wilmington. Also, it provides a one-seat ride connecting a number of stops that would require one or more transfers (and significant wait times) to use the transit services connecting those points.

The two services vary in terms of cost and ridership. The operating cost per mile of the Greyhound route is more than twice that of the BayRunner service, reflecting the higher costs of the CDL driver, larger vehicle, and overhead costs of the national network (terminals, ticketing system, etc.) The revenue per mile on BayRunner is much higher than Greyhound, as one would expect from the much higher fare levels on the BayRunner service. The current Section 5311(f) fare from Baltimore to Grantsville on BayRunner Shuttle is approximately $0.46 per mile for one person, lower for groups of two or three. The Salisbury-Baltimore fare on BayRunner for one person is $0.64 per mile, also lower for groups of two or three. The current Greyhound fare (for a non-peak weekday) between College Park and Elkton on the Section 5311(f) route is approximately $0.38 per mile. With lower costs and higher fares, the BayRunner service has a higher farebox recovery and lower subsidy per passenger than the Greyhound route. However, even Greyhound's farebox recovery and boardings per trip on this route are comparable to rural public transit. For intercity bus services the subsidy per passenger is always high in comparison to local transit because of the much higher average trip length.

Curbside Services

As noted above, curbside bus services have developed over the past decade, spreading from the northeastern United States to offer service to a broader area. The general service model does not utilize terminals or agents, as passengers buy tickets online and queue to board buses at designated curbside locations. The services generally serve only larger population centers or major universities and operate express schedules with no more than one or two stops en route to pick up or drop off additional passengers. The carriers may or may not have their own websites, perhaps selling tickets through third-party vendors. They do not participate in interlined ticketing with other carriers, and schedules are not designed to facilitate connections to other intercity carriers (either to their own services or other carriers), though their stops may be curbside at major public transit terminals or at public park and ride lots. Often fares are lower than traditional intercity bus or rail passenger fares, and there may be substantial discounts for reservations made well in advance.

Current Curbside Services

As documented in the previous *Maryland Statewide Intercity Bus Study*, there were (and are) a number of curbside bus operators linking Maryland population centers to New York City, other major cities in the northeast, and now with cities in the Carolinas. Since the previous study, several carriers have entered this segment of the market, and several have exited, but the coverage has remained approximately the same until the outbreak of the pandemic.

Because of the reduction in travel demand as a result of the COVID-19 pandemic, most of these carriers have severely reduced or completely suspended service. Some of them have left their websites intact, but if one tries to buy a ticket, there are none available. Others have posted information about service suspensions, and others are still offering service. Table 3-7 presents a summary of current (December 2021) known information about these carriers. None of them provide timetables (even pre-COVID) that show frequency. If their website is still showing Maryland stops, we assume that their intention is to resume service to these points when travel demand picks up.

Table 3-7: Curbside Carriers Serving Maryland Stops - Current Status (December 2021)

Bus Brand	Maryland Stops	Destinations from Maryland	Current Status
Boltbus	1578 Maryland Ave., Baltimore 21201; Greenbelt - Metrorail Station	Washington, D.C. New York, NY	All service currently suspended, passengers directed to Greyhound service-Website anticipates a return to service in the future.
Coach Run	5501 O'Donnell Street Cut-off, Baltimore (TA Gas Station); 801 North Point Blvd., Baltimore (Best Buffet Restaurant); 4931 Calvert Road, College Park (College Park Metrorail Station)	New York, NY Washington, DC Richmond, VA Raleigh, NC Durham, NC Greensboro, NC Charlotte, NC	Unclear - website functional but no trips available. COVID-19 status note says operating reduced schedules.
Flixbus	Baltimore	New York, NY Philadelphia, PA Boston, MA Richmond, VA	Currently only service to/from Baltimore
Megabus	White Marsh Mall (JC Penney) and White Marsh MTA Park and ride lot;	Philadelphia, Harrisburg, Pittsburgh, State College, PA New York, NY Washington, D.C.	Website functional, service reduced - Annapolis stop suspended
Vamoose (DC Trails, Inc.)	7401 Waverly St., Bethesda (Bethesda Metrorail Station)	New York, NY	Reduced schedules-four daily round trips (12-21)
Wanda Coach	Baltimore, maybe Hagerstown	New York, New York Cities in the Carolinas	Unclear what is operating, and what the services are.

While these operators provide a significant transportation option for Maryland residents, virtually all of it can only be used to make trips to/from points in other states, and none of the stops are in rural areas. Because a number of the stops they use are at major public transit stops, there is connectivity to transit (for example at the Greenbelt Metro station or White Marsh MTA park and ride lot), but there is no connectivity with the national intercity bus network.

Long-Distance Regional Commuter Bus

Commuter bus services are generally characterized as peak-hour, peak-direction (to major employment centers) services, usually only on weekdays. Often there are commuter fares such as multi-ride tickets or passes. Such services are not intercity bus services, and the FTA expressly prohibits the use of Section 5311(f) rural intercity bus funding for commuter bus service.

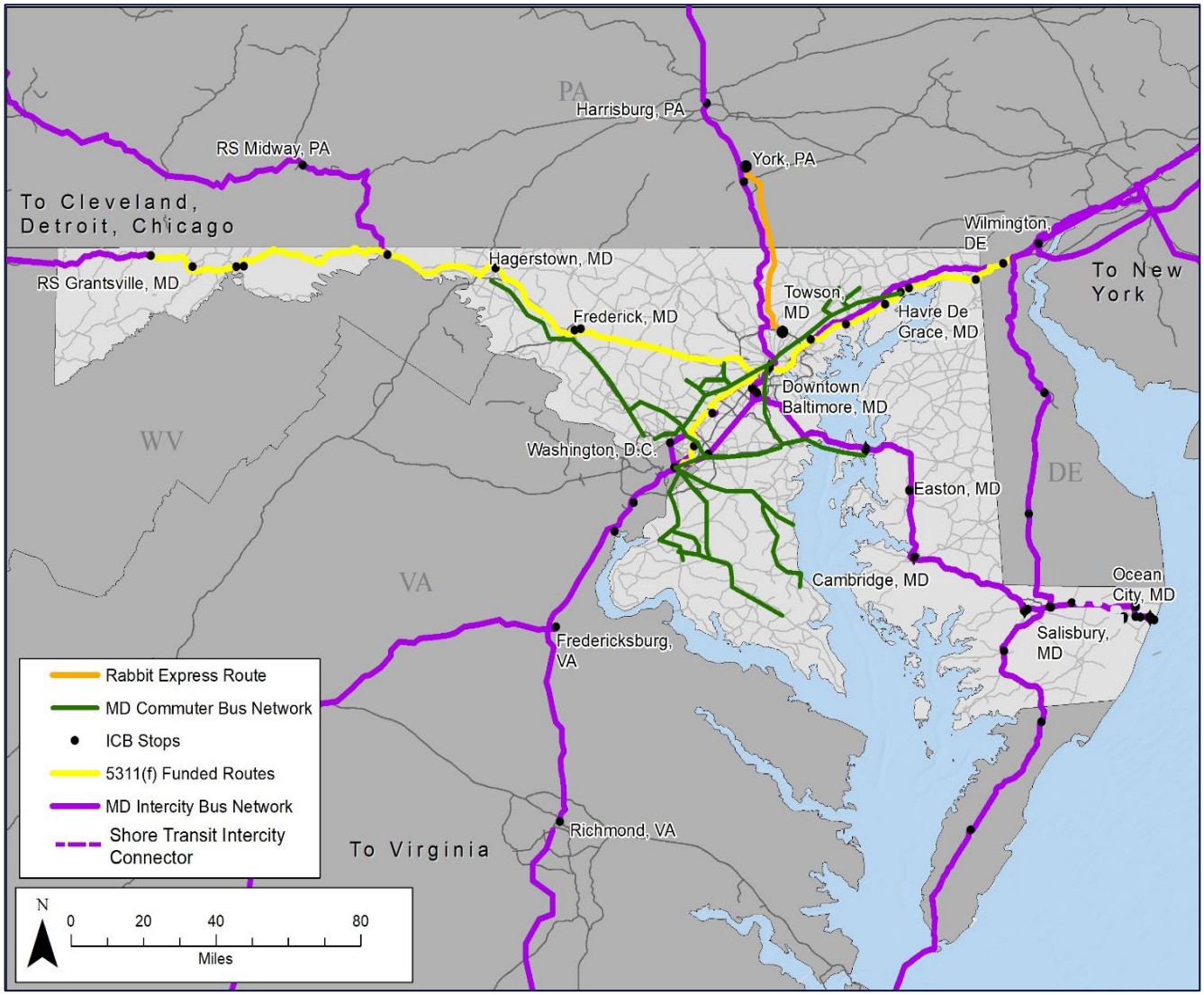
However, there are a number of longer distance commuter bus services in Maryland that could be used by passengers to make trips connecting to the national intercity network—if the schedules work and the stops are located near enough to intercity stops. They include publicly funded services operated by transit providers, unsubsidized services provided by private firms, and publicly funded services operated under contract by private providers.

None of these services are listed in intercity bus information systems such as those offered by Greyhound, Megabus or Amtrak, and none offer joint fares. In some cases the connection to the national intercity bus network would require a transfer to local transit, such as the Metro in Washington, D.C. Figure 3-10 illustrates these routes in relation to the intercity bus network.

MDOT MTA Commuter Bus Routes

There are 36 commuter bus routes throughout Maryland that can potentially increase connectivity, particularly in central and southern Maryland. Commuter bus service coverage is particularly significant in southern Maryland, which currently lacks intercity bus service. Also, the MTA commuter bus network includes services from Hagerstown and Frederick that connect to WMATA Metrorail, allowing riders to access downtown Washington, D.C. (including intercity bus and rail service at Union Station). MDOT MTA provides these services by contracting with private for-profit firms. At least one of these firms also provides intercity bus service. Dillon's Bus Lines is owned by Coach USA, and has been an operator of Megabus branded services and is also the contracted operator of the Section 5311(f) Virginia Breeze rural intercity services operated by the Virginia Department of Rail and Public Transportation (DRPT), connecting Virginia points with Megabus at Union Station in Washington, D.C.

Figure 3-10: Long-Distance Commuter Bus Lines in Maryland



Rabbit Transit

Another commuter bus route that operates in Maryland is operated by Rabbittransit in York, Pennsylvania. The rabbit*EXPRESS* 83S service operates multiple round trips on weekdays between York and northern Maryland. Originating in York, PA, there are Maryland stops at the MDOT MTA Hunt Valley Light Rail station, at Industry Lane, at the MDOT MTA Timonium Light Rail Station, at 111 Chesapeake Avenue, York Road at W. Pennsylvania Avenue, and 701 E. Joppa Road (Black and Decker). Through the connections to light rail downtown Baltimore and BWI Airport can be accessed. There are six round trips per day, three early morning and three mid- to late-afternoon. Off-peak direction return trips have limited stops, limiting the usefulness of these services for Maryland residents commuting to York.

Regional Connector - Shore Transit

Greyhound formerly operated its service from Baltimore to the Eastern Shore all the way to Ocean City, but over time it sought to reduce its footprint and service. Initially it closed the Ocean City terminal, moving its stop to the West Ocean City Park and Ride lot, and subsequently it dropped the service between Salisbury and Ocean City, reaching an agreement with Shore Transit to link its services in Salisbury with Ocean City. Shore Transit's route from Salisbury State to their terminal also provides a needed link to intercity connections.

Shore Transit is a division of Tri-County Council for the Lower Eastern Shore. It is the public transportation provider for Somerset, Wicomico, and Worcester counties. It was already operating service between Salisbury and Ocean City. Shore Transit's Salisbury Bus Terminal at the Tri-County Council Multipurpose Center (Route 50 West in Salisbury) became the Greyhound bus stop, and Shore Transit became the Greyhound agent.

Prior to Greyhound's pandemic related bus service suspensions, the Shore Transit link to Ocean City was found in Greyhound's ticketing system, and passengers could buy a ticket to Ocean City from any Greyhound origin, and Greyhound would pay Shore Transit their local fare. Currently it is not available as an option on the Greyhound site.

While it has been affected by the reduction in Greyhound service, this arrangement offers a potential model for improved connectivity between the intercity network and regional transit, particularly if the stop locations are coordinated.

Conclusions

Prior to the COVID-19 pandemic Maryland benefited from its location by having extensive services available from Washington, D.C. through Baltimore to the northeast, with frequent services on multiple schedule patterns to/from cities on the northeast corridor from both national network (Greyhound) and curbside carriers. Services to the west and east were more limited but available, with connections from Baltimore to the major cities of the Midwest. Services connecting Baltimore and BWI Airport with western Maryland and the eastern shore were more limited.

Currently as carriers have adjusted to a severe reduction in travel, services are dramatically reduced but at the moment a minimum level of coverage still exists. Greyhound suspended many schedules on the northeast corridor, but travel options are still there. Greyhound services to the Midwest have been reduced to a single lifeline route, and to the east Greyhound has suspended connections. Many of the curbside carriers have suspended service or are offering very limited schedules. Service to western Maryland still exists on the routes funded by MDOT MTA, and to Salisbury on unsubsidized schedules provided by BayRunner Shuttle.

Looking ahead, no one in the intercity travel industries is able to make firm predictions about when travel demand will pick up, and how much unsubsidized service will be provided and by which carriers. Service from Washington to Baltimore and to points in the northeast likely recover and be provided at levels appropriate to the demand, and it is unlikely that will require public subsidies. However, service from central Maryland to the eastern shore and western Maryland will need to be a focus of this plan.

For western Maryland, the availability of FTA Section 5311(f) and CARES Act funding has meant that service has continued and will likely continue in the future. For the eastern shore, Greyhound has suspended its one Baltimore-Norfolk route, and it is not known whether it will return. BayRunner Shuttle has reduced the frequency of its Baltimore/BWI service to Ocean City, and the firm has been helped by CARES Act funding, but a major concern is ensuring that Eastern Shore residents continue to have access in the future. Southern Maryland is the largest area of the state that is relatively distant from the intercity bus network, but it benefits from a number of commuter bus services provided by MDOT MTA. Given this high level of coverage with service to downtown Washington, D.C., a consideration is whether there is a way to provide for connectivity for those wishing to go beyond D.C. Also, although many intercity bus services connect from Baltimore to Washington's Union Station, both of Maryland's east and west routes do not connect to Washington, D.C., so many travelers going to the District of Columbia have an additional transfer. These are all considerations for alternatives to the current network and linkages.

Maryland Intercity Bus Study Update

Chapter 4: Maryland Intercity Bus Needs Assessment

Introduction

An important step of the **Maryland Intercity Bus Study Update** process is assessing the study area's current and future transit needs. This chapter examines the extent to which Maryland's intercity bus network meets potential public need for intercity connections. It determines areas of high relative need based on the density and percentage of potentially transit-dependent populations. It also identifies places that are likely to be intercity bus destinations, including commercial airports, correctional facilities, educational institutions, medical centers, and military instillations. By overlaying the existing bus network with potential origin areas of high need and potential destinations, the analysis reveals both key intercity connections and gaps that exist. The analysis also shows that much of the current network is responsive to the needs identified within this chapter.

Demographic Analysis – Trip Origins

The need for any type of public transportation is largely based upon an area's population density, relative age, and economic characteristics. Potential transit dependent populations may require bus service to meet mobility needs due to characteristics such as age, income, or automobile availability. Using data from the 2010 Census and the 2014-2018 American Community Survey (ACS) five-year estimates, the following population segments were selected:

- **Young adults (persons ages 18 to 24):** This group consists of college students, enlisted military personnel, and other young adults who may not have access to a personal vehicle. Prior research indicates this age group makes up the majority of intercity bus ridership nationally.

- **Older adults (persons ages 65 and older):** As individuals age, they may face diminished driving skills or simply lose the desire to drive, especially for long distances. This cohort may also have increased needs for medical services including specialty services which may only be available in regional centers.

- **Persons living at or below the poverty line:** Individuals who may be fiscally unable to own or maintain a personal vehicle are much more likely to use public transportation for regional and long distance trips.

- **Persons with disabilities:** Individuals with disabilities that prevent the use of private vehicles to meet transportation needs.

- **Autoless households:** Whether it is a matter of choice or a monetary decision, persons without access to a car must rely on alternative transportation methods.

These population segments were chosen due to national research regarding passenger characteristics of typical intercity bus riders and the goal of providing mobility to populations that are less likely or unable to use private vehicles to meet mobility needs. It should be noted that this analysis focuses mainly on the likely ridership for intercity bus services, including persons that are also likely to need local public transit. It does not fully address potential markets of "choice" riders – those who have a vehicle available or means to travel by another method.

Methodology

For the demographic analysis, Census data was gathered at the block group level for each of five needs categories (young adults, older adults, persons living below the poverty level, persons with disabilities, and autoless households). The four categories were combined into aggregate measures of need (called the Transit Dependence Index) based on the density of the population with a high transportation need and the percentage of the population with high needs characteristics.

Transportation services are typically prioritized in areas with greater population densities; however, it is also important to look at the percentage of the population that is transit dependent. Substantial percentages of transit dependent populations indicate a high proportion of people who may need transit, though they may be spread out over large and primarily rural areas.

The scale used for the demographic analysis ranges from "low" to "very high," reflecting demographic characteristics in relation to the statewide average. Table 4-1 presents an explanation of the indexed values.

Table 4-1: Demographic Measurement Scale

Demographic Measurement Scale	
Index Category	Value Relative to State Average (SA)
Low	Less than 1x SA
Elevated	Between 1x and 1.33x SA
Moderate	Between 1.33x and 1.67x SA
High	Between 1.67x SA and 2x SA
Very High	2x SA or more

Analysis

Population density is one of the most useful indicators of whether an area can support transit services. High density areas generally have higher populations of transit dependent individuals, more pedestrian infrastructure for better access, and frequent trip generators. It is important to recognize that identifying areas of high relative transit need is not the same as forecasting ridership. Mapping the density and percentage of transit dependent persons can highlight potential demand. However, rural areas especially may not have the density to support unsubsidized intercity bus service. Such areas may be candidates for rural feeder services particularly as part of local transit services.

Population Density

Approximately six million people live in Maryland, according to the ACS 2014 to 2018 five-year estimates (Figure 4-1). The population is concentrated in central Maryland, clustered around Washington, D.C. and Baltimore. When calculated by census block group, population densities in Maryland range from less than one person per square mile in rural areas of the state, to over 150,000 persons per square mile in urban areas.

Most census block groups that have a population density of 3,001 people or higher are located within 25 miles of an intercity bus stop, except one census block group in St. Mary's County. In Maryland, nearly 97 percent of the population lives within 25 miles of an intercity bus stop or station and 73 percent live within ten miles.

Young Adult Population

Examining the percentage of the population that is in the 18-24 age group, there are five block groups classified as having a "very high" percentage of young adults that fall outside of 25 miles of the intercity bus network (ICB) (Figure 4-2). Other block groups classified as "very high" and "high" are scattered throughout Maryland, but are mostly clustered around Washington, D.C. and Baltimore City.

Older Adults

When examining the percentage of persons ages 65 and older in the state of Maryland, the block groups classified as "very high" or "high" are scattered throughout the state. However, there are five block groups classified as "very high" that are not within 25 miles of the intercity bus network (Figure 4-3). These block groups are in the following counties:

- Charles County
- Garrett County
- Calvert County
- St. Mary's County

Figure 4-1: Maryland Population Density and Proximity to Intercity Bus Network

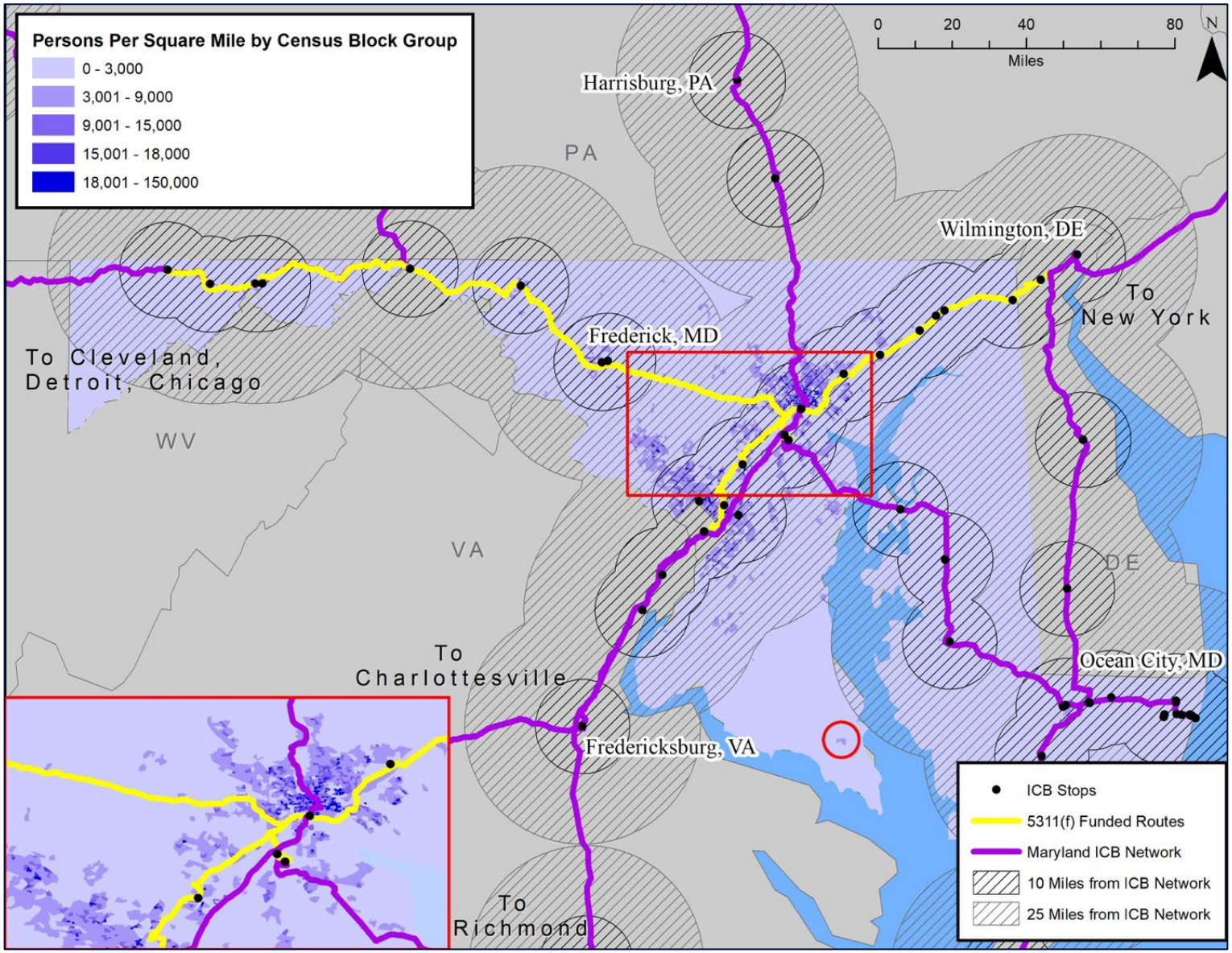


Figure 4-2: Percentage of Young Adult Population Clusters and Proximity to Intercity Bus Network

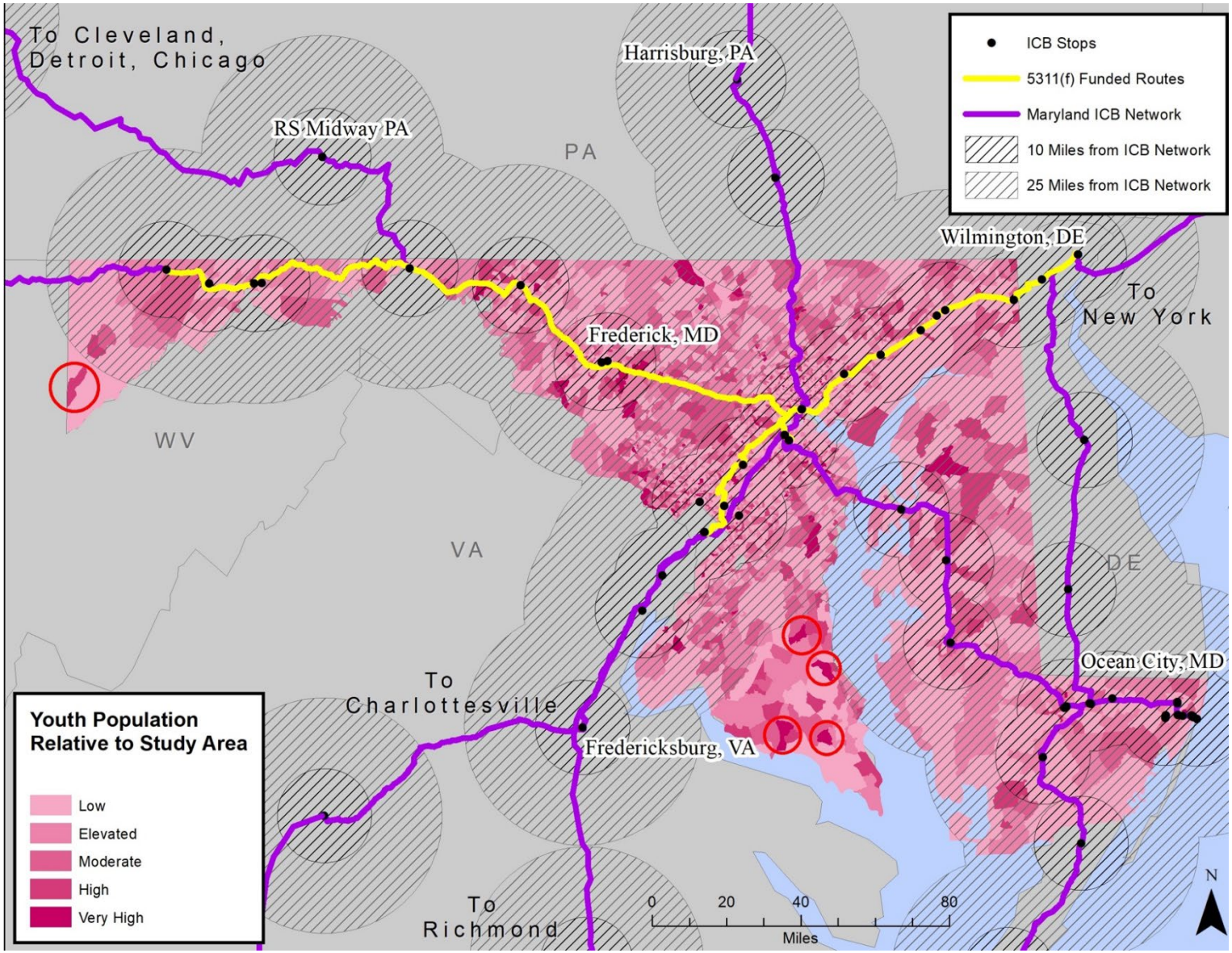
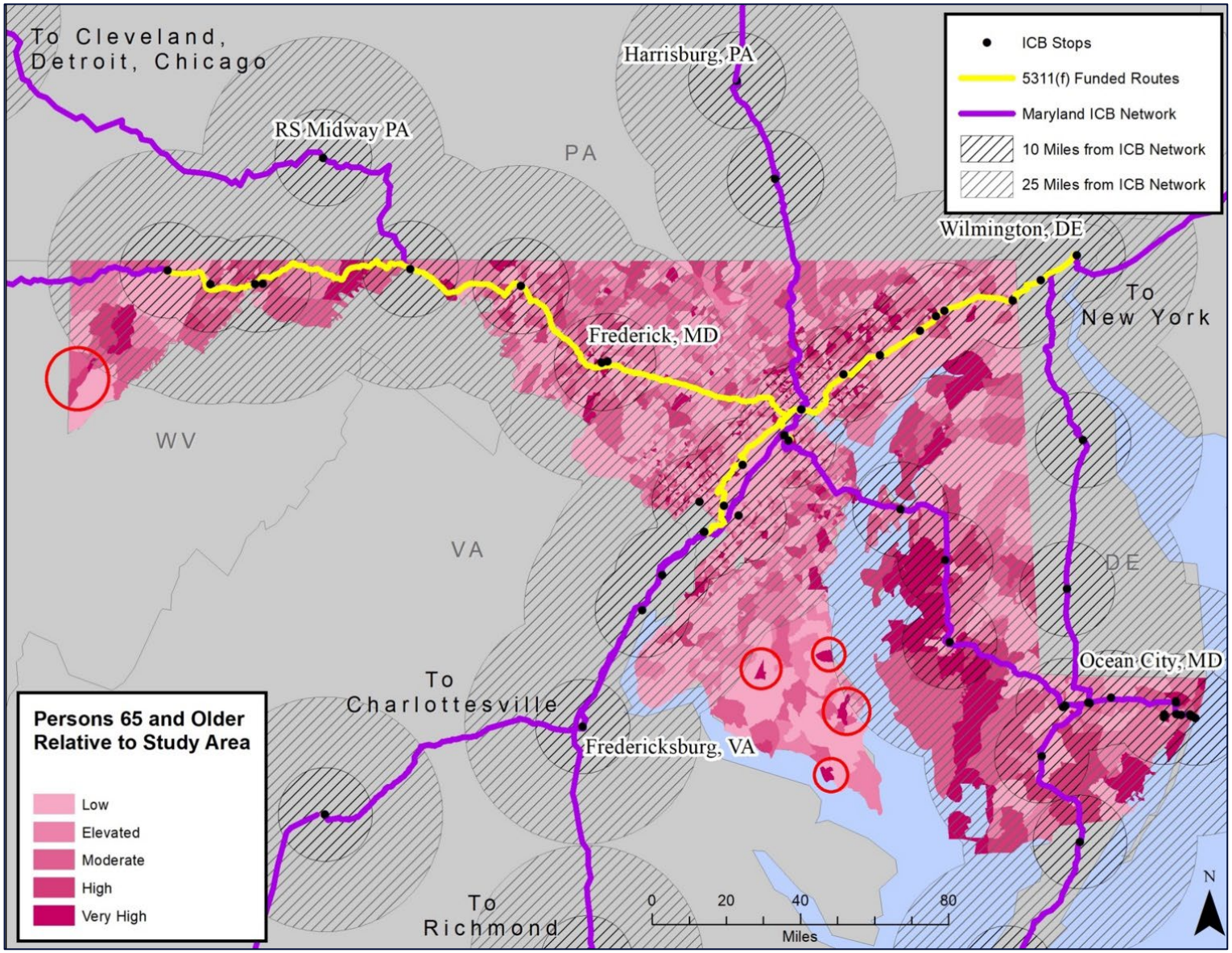


Figure 4-3: Percentage of Older Adult Population and Proximity to Intercity Bus Network



Population Below Poverty Line

Throughout Maryland, census block groups of residents living below the poverty line that are classified as "above average" are scattered throughout the state (Figure 4-4). There are twenty-six block groups that are "above average" that fall outside 25 miles of the ICB network. The block group with the largest number of residents living below poverty (915 people) is located within St. Mary's County. The second and third block groups with the largest number of residents below poverty line (512 and 402 people) are both also located in St. Mary's County. The twenty-six block groups outside 25 miles of the ICB network are located in:

- St. Mary's County (17)
- Carroll County (4)
- Calvert County (2)
- Charles County (2)
- Garrett County (1)

Population with Disabilities

There are only six block groups of persons with disabilities classified as "very high" that are not within 25 miles of an intercity bus station or bus stop in the state (Figure 4-5). These block groups are located in the following counties:

- Garrett County
- St. Mary's County
- Calvert County

Autoless Households

Of the census block groups that have a relatively high percentage of households that are without a private vehicle, there are few locations that are 25 or more miles from an intercity bus stop. One census block group in Garrett County (classified as "high"), two in Charles County ("very high" and "high'), two in St. Mary's County ("very high)", and one in Calvert County ("moderate") are more than 25 miles from a stop. (Figure 4-6).

Every county in Maryland, except Garrett County, have some locations with very high percentages of autoless households and most have locations between ten and 25 miles from the intercity bus network. Garrett County shows block groups that are classified as "high," but none that are classified as "very high."

Figure 4-4: Percentage of the Population Below Poverty Level and Proximity to Intercity Bus Stops

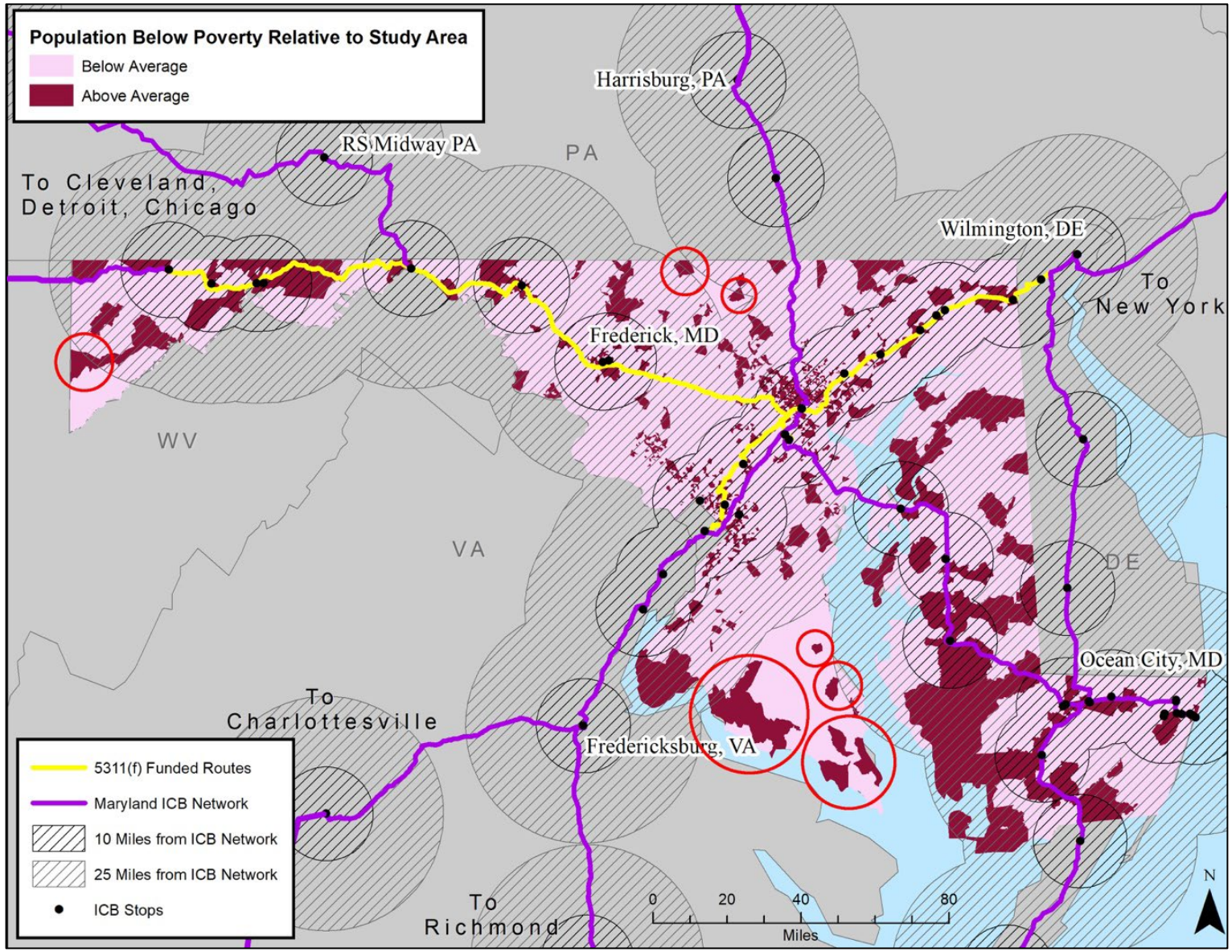


Figure 4-5: Percentage of the Population with Disabilities and Proximity to Intercity Bus Stops

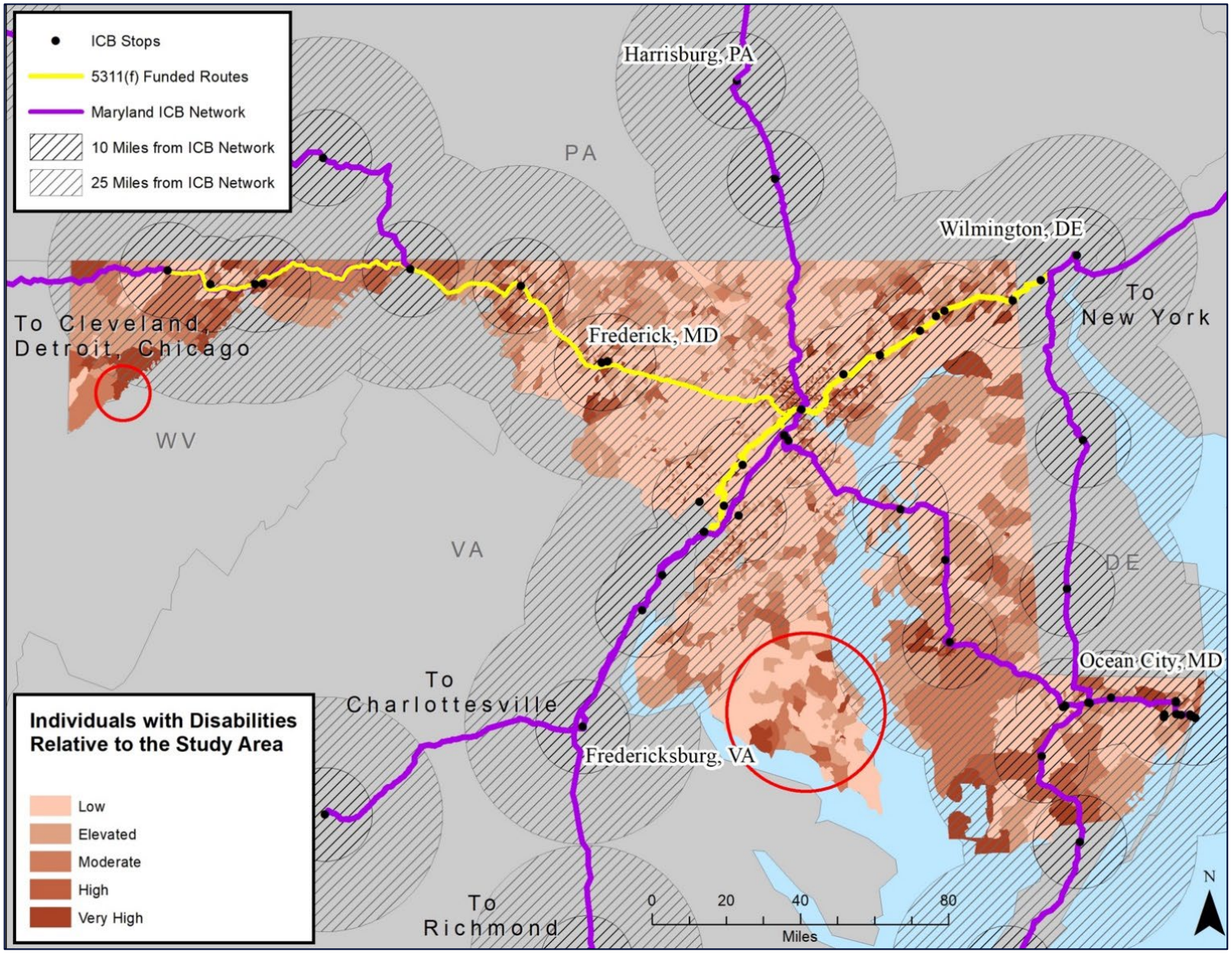
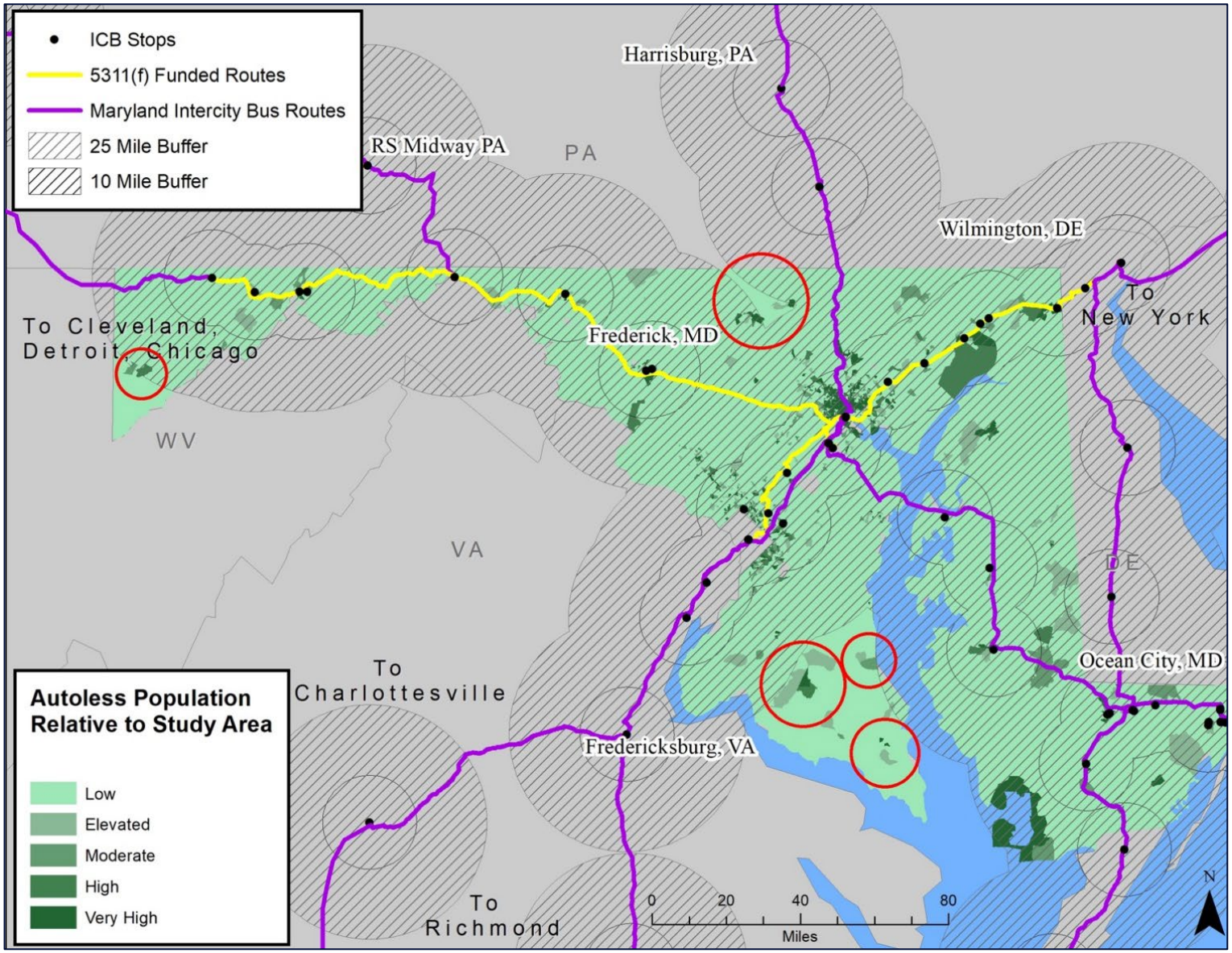


Figure 4-6: Percentage of Autoless Households and Proximity to Intercity Bus Stops



Transit Dependence Index

Transit Dependence Index Based on Population Density (TDID)

The Transit Dependence Index (TDI) is a combined index of the factors previously discussed individually that reflects the potential need for public transportation in an area relative to the state overall (Figure 4-7). The density of persons with a high transportation need index is presented in the TDID measure, which depicts areas in which there are significant numbers of persons with a higher need for public transportation. As illustrated in Figure 4-8, the relative classification system utilizes averages in ranking populations. For example, areas with less than the average transit dependent population fall into the "very low" classification, while areas that are more than twice the average are classified as "very high." Much of Maryland is classified as "very low" or "low" need with only a few areas of high needs, especially clustered around Washington, D.C. and Baltimore City.

Figure 4-7: Density of Persons with a High Transit Dependence and Proximity to Intercity Bus Stops

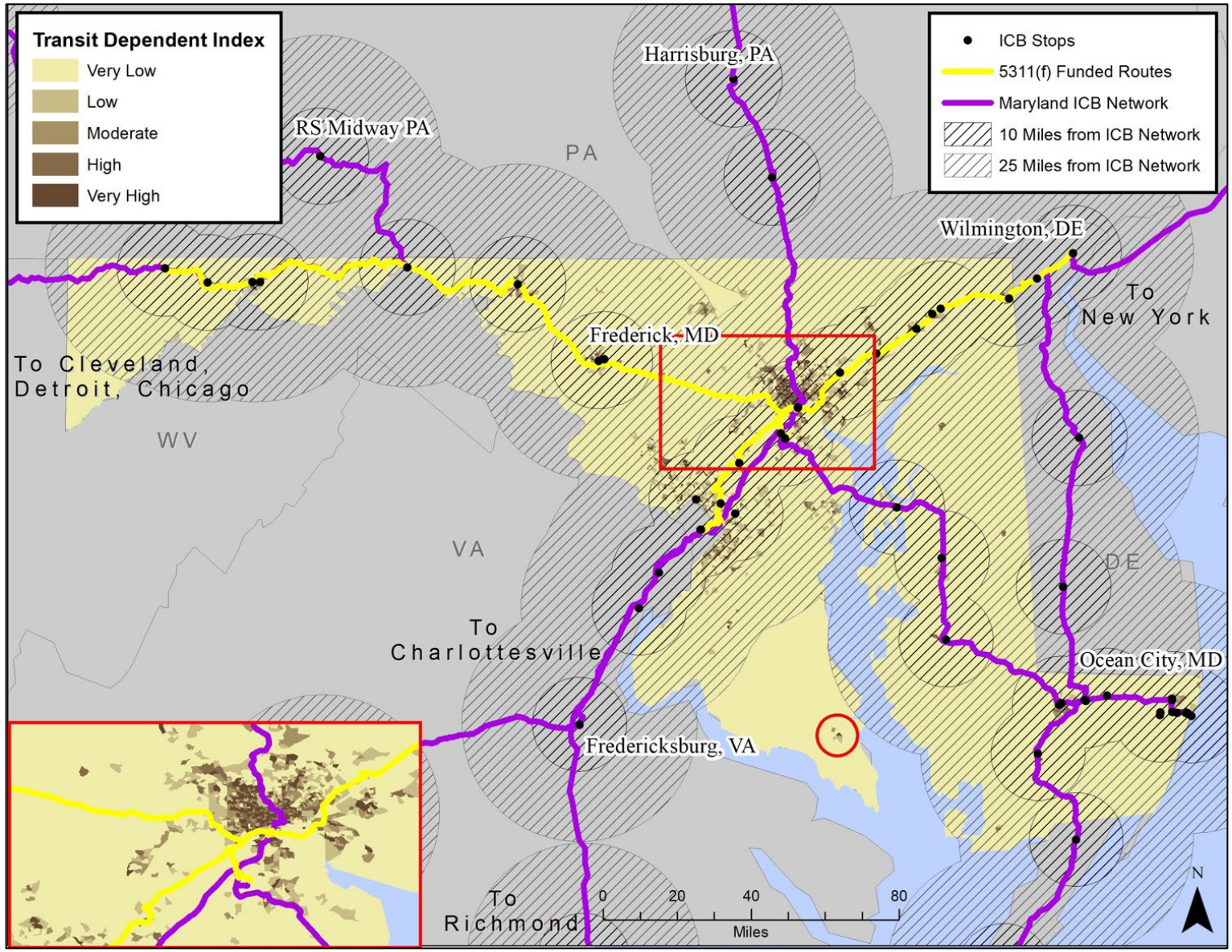
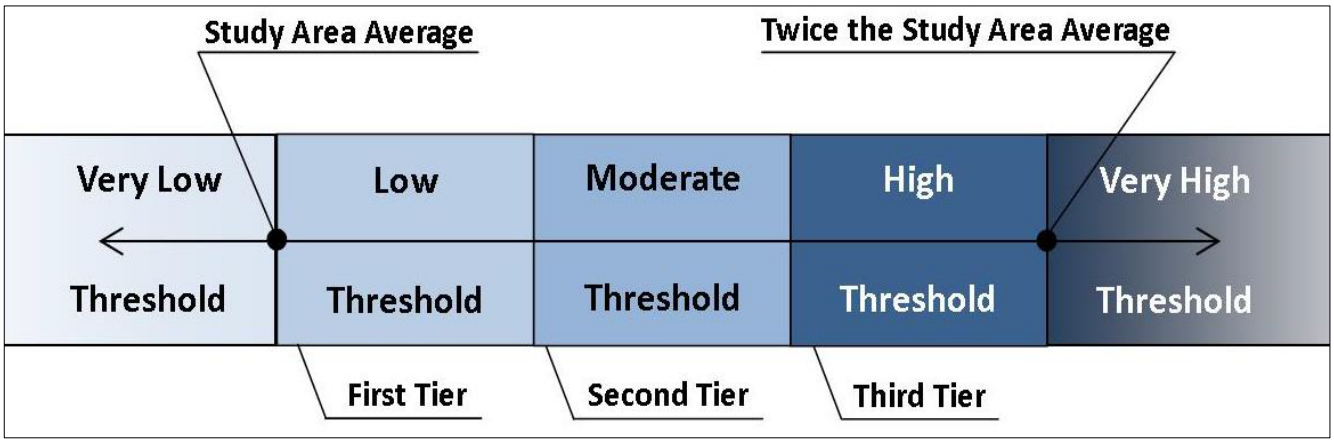


Figure 4-8: Transit Dependent Populations Classification System



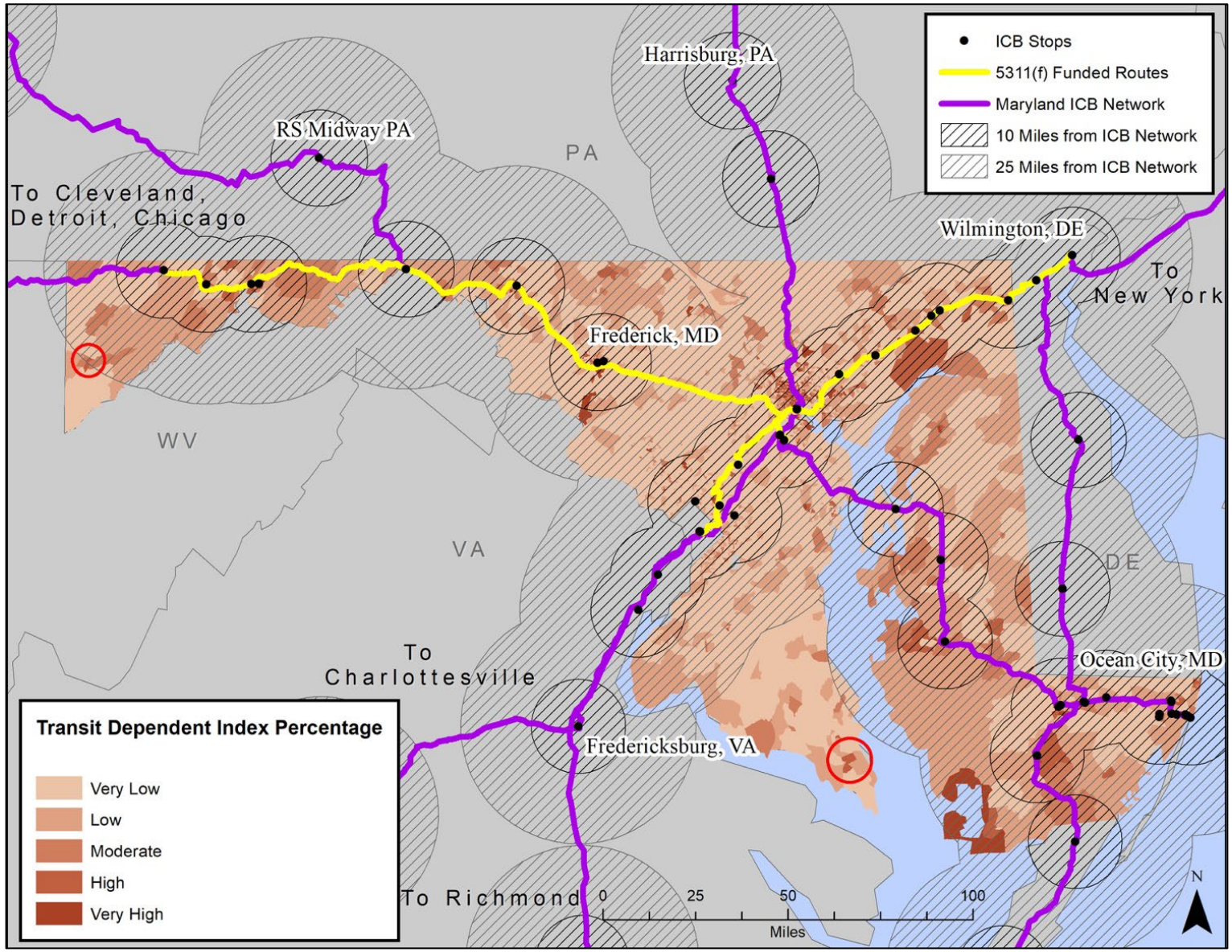
There are five block groups that fall outside of the 25-mile coverage area around ICB network stops. Many of the block groups that are classified as "high" or "very high" are clustered around ICB stops, which makes them difficult to locate on Figure 4-7. Except for Garrett County, all of Maryland's counties (and Baltimore City) have block groups with higher levels of transit needs ("high" or "very high"), but all are less than 25 miles from the nearest intercity bus stop.

Transit Dependence Index on a Percentage Basis (TDIP)

The TDIP is similar to the TDID but does not use the population density multiplier. Instead, the TDIP evaluates the total amount of transit dependent individuals in each block group, calculates the percentage of dependent individuals, and gives a score based on how that percentage relates to the study area average. The TDIP is useful in showing the block groups with a high degree of transit dependence, rather than a high number of transit dependent populations.

When the population with a high Transit Dependence Index is considered as a percentage of the overall population in an area, the results may differ, as even a few persons with high needs may make up a significant percentage of a widely dispersed rural population. However, in Maryland all the census blocks that are classified as "very high" or "high" need in terms of the percentage of the population with a high need TDI fall within 25 miles of the intercity network, except for three block groups in Garrett County and St. Mary's County, which are not within the 25 mile coverage area (Figure 4-9).

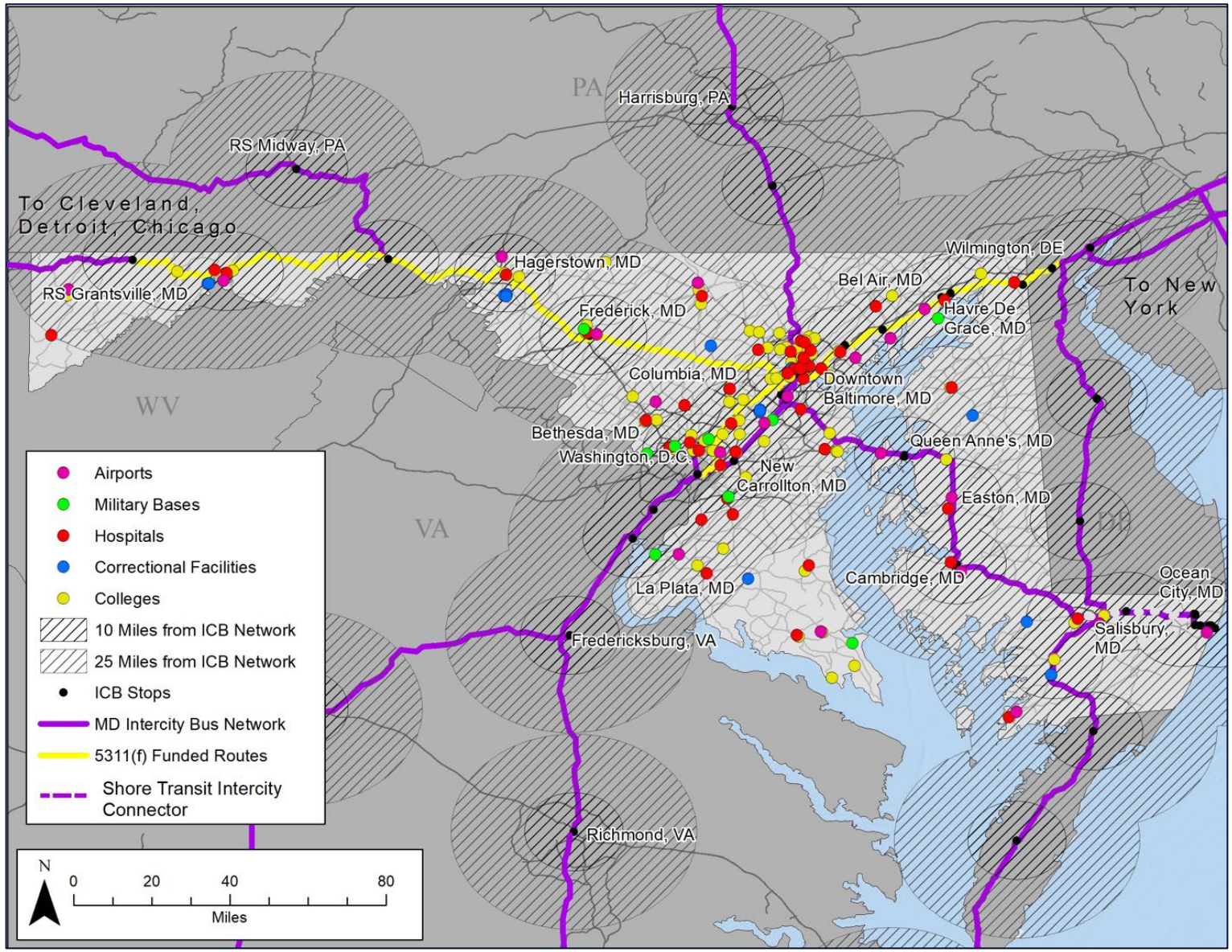
Figure 4-9: Percentage of the Population with a High Transit Dependent Index and Proximity to Intercity Bus Network



Access to Key Destinations and Facilities

In addition to the analysis of demographic data to determine areas where there are concentrations of persons who are more likely to need transit (potential intercity trip origins), there is also a need to see if the most likely destinations (attractors) are served. The purpose is to gauge the ability of current routes to serve places that are likely to be attractors for intercity trips. These include colleges and universities, military bases, major medical centers, correctional facilities, and commercial airports. These destinations are mapped in Figure 4-10.

Figure 4-10: Maryland Intercity Trip Generators and Proximity to Intercity Bus Network



Key Destinations More than Twenty-Five Miles from an Intercity Bus Stop

Nearly all identified intercity trip generators in Maryland are located within 25 miles of an intercity bus stop. Locations that are more than 25 miles from an intercity bus stop might not be reachable by local public transit or would require a very expensive local taxi or ride-hail service trip. These locations might be considered for additional intercity or regional expansion services, or as new stops on existing services.

The following intercity trip generators are more than 25 miles from the nearest intercity transit stop:

- **Calvert County**
  - Calvert Memorial Hospital and College of Southern Maryland
- **Charles County**
  - Southern Maryland Pre-Release Unit
- **Garrett County**
  - Garrett County Memorial Hospital
- **St. Mary's County**
  - St. Mary's Hospital, Leonardtown Campus of College of Southern Maryland, Southern Maryland Higher Education Center, St. Mary's College, Seafarers Harry Lundeberg School of Seamanship, Patuxent River Naval Air Station, and St. Mary's County Regional Airport

Key Destinations More than Ten and Less than Twenty-Five Miles from an Intercity Bus Stop

Destinations that are between ten and 25 miles of an existing intercity bus stop could be seen as potentially reachable by taxi, ride-hail services, or local transit. They could also be considered as locations for an additional stop on an intercity service if an existing route passed in close proximity.

The following intercity trip generators are between ten and 25 miles from the intercity transit network.

- **Airports**
  - Carroll County Airport
  - Garrett County Airport
  - Montgomery County Airpark

- **Maryland Department of Correction Facilities**
  - Central MD Correctional Facility (Carroll County)
  - Eastern Pre-Release Unit (Kent County)

- **Colleges and Universities**
  - Carroll Community College (Carroll County)
  - Garrett College (Garrett County)
  - Germantown Campus of Montgomery College (Montgomery County)

  - ITT Technical Institute (Baltimore County)
  - La Plata Campus of College of Southern Maryland (Charles County)
  - McDaniel College (Carroll County)
  - Mount St. Mary's University (Frederick County)
  - Owings Mills Campus (Baltimore County)
  - Stevenson University (Baltimore County)
  - The Universities at Shady Grove (Montgomery County)
  - Waldorf Center for Higher Education (Charles County)
  - Washington College (Kent College)

- **Major Hospitals and Medical Centers**
  - Anne Arundel Medical Hospital (Anne Arundel County)
  - Carroll Hospital Center (Carroll County)
  - Chester River Hospital Center (Kent County)
  - Civista Health (Charles County)
  - McCready Health Services (Somerset County)
  - Montgomery General Hospital (Montgomery County)
  - Shady Grove Adventists Hospital (Montgomery County)
  - Southern Maryland Hospital Center (Charles County)

Summary

In terms of coverage, the current intercity bus network provides a relatively high degree of coverage to Maryland's population. Approximately 97 percent of Maryland's residents live within 25 miles of an intercity bus stop or station, and 73 percent live within ten miles. This suggests that there are no large areas in Maryland that are completely lacking service—and it supports a focus on maintaining the existing intercity bus network in order to retain this high level of coverage.

It should be noted that St. Mary's County, Calvert County, and Charles County, all located in the southern portion of Maryland, include multiple populations that are not being served, as they are not within 25 miles of an intercity transit station or stop: total population density, young adults, older adults, population below the poverty line, population with disabilities, and the autoless population. However, if the service coverage provided by MTA's commuter bus program is considered, knowledgeable bus riders could access the national intercity network in Washington, D.C. although the commuter bus routes do not connect directly with intercity services at Union Station.

In Garrett County, there are block groups with a high concentration of persons with disabilities, below the poverty line, autoless households, young adults, and older adults that are not within 25 miles of an intercity transit station or stop. Carroll County also has some block groups with a high concentration of autoless populations and people below the poverty line that are not within 25 miles of an intercity transit station or stop. Ideally, any proposals for new services would accomplish both improved connectivity and also address gaps in current coverage. Consideration of options that use local transit to provide connections to the intercity network may be appropriate, given the limited populations that are unserved.

Maryland Intercity Bus Plan Update
Chapter 5: Stakeholder Input

Introduction

A key element of intercity bus planning is the consultation process which is required by the FTA[1]. Section 5311(f) funding for rural intercity bus projects is provided as a minimum 15 percent set-aside of each state's overall Section 5311 funding allocation. However, the Governor may certify that a state's rural intercity bus needs are met (or partially met) and request that the intercity set-aside funding be used for other eligible Section 5311 projects. States seeking to certify that the intercity needs are met are required to conduct a consultation process (at least every four years) with the public, stakeholders and bus operators to determine if there are unmet intercity needs.

In recent years Maryland has obligated the required 15 percent (including the 15 percent intercity set-aside of CARES Act funding) and has not sought to certify and reprogram funds. However, to make sure that the program is addressing unmet intercity needs, MDOT MTA included a number of outreach activities in the update of its intercity bus plan. This process was complicated somewhat by the impact of the COVID-19 pandemic, which necessitated virtual meetings and which had impacts on scheduling.

Outreach methods included:

- Participation in stakeholder meetings conducted for the Maryland Statewide Transit Plan in four regions across the state.
- Surveys of key stakeholder groups including regional transportation planners and the Locally Operated Transit Services (LOTS) agencies across the state.
- A study advisory committee.
- Consultation interviews with private providers of intercity bus services.
- Other written comment opportunities.

This chapter details the results from these activities. It should be noted up front that there was limited response and that many respondents did not apparently understand the focus on intercity services. In addition, it is possible that many potential respondents were confused about this project because its outreach efforts coincided with those of the Maryland Statewide Transit plan—they may have felt that they had already provided input and so did not need to respond for this study, particularly because this study team also participated in the final round of stakeholder input meetings for the Maryland Statewide Transit Plan.

[1] Federal Transit Administration, Circular C 9040.1G, Formula Grants for Rural Areas: Program Guidance and Application Instructions, October 24, 2014, Chapter VIII. Intercity Bus, 4. Consultation Process Requirements, p. VIII-2

Statewide Transit Plan Regional Meetings

Consulting team staff attended the four virtual regional meetings held as part of the second round of stakeholder meetings. Meetings were held and focused on the Baltimore region, Washington region, western Maryland and the Eastern Shore. At each meeting the overall discussion of needs was monitored for needs or issues reflecting potential intercity needs, and staff described what was meant by intercity. Participants were asked about intercity needs. While intercity needs were considered as part of the overall plan for a fifty-year planning horizon, specific corridors or services mentioned included:

- Intercity service connecting Washington and Baltimore to the Eastern Shore
- Continued availability of high frequency intercity service from Washington and Baltimore to points north and south by passenger rail and bus
- Connectivity to BWI Thurgood Marshall Airport from outlying areas
- Continued service from western Maryland to Baltimore
- Additional service (including off-peak, counter-flow and weekend) between Frederick and Washington, D.C. as part of western Maryland service
- Frequent service between Hagerstown and Frederick, primarily to serve work trips
- Rail passenger service from Hagerstown to Washington, D.C.
- More frequent intercity/commuter service between Harrisburg and York in Pennsylvania and Baltimore
- Improved connectivity from southern Maryland to Washington, D.C. and to a lesser extent to Baltimore

In addition, there were several comments that applied more generally to all intercity bus services in Maryland:

- Additional frequencies for intercity services in all corridors, in line with demand
- Improved information systems to facilitate user discovery of available services and connections, and
- Better connectivity between local transit and intercity services through shared stops and information systems.

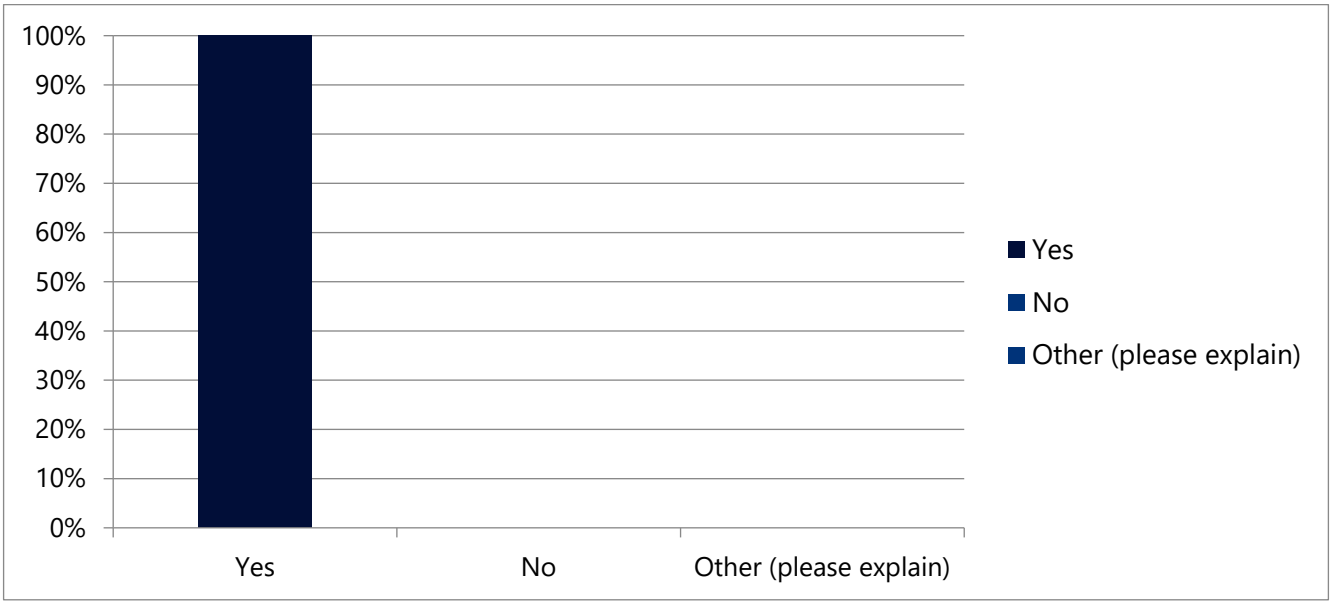
Surveys of Regional Planning Agencies and Transit Operators

Two similar surveys were sent to the regional planning agencies and the LOTS to obtain their perspective on the intercity bus services in their jurisdictions. They were sent with a letter from MDOT MTA and a brief overview about the study and Maryland's intercity bus program (Appendix A). The responses from the agencies that replied reveal some confusion about what was meant by "intercity" bus, as many of the comments regarding services and needs deal with local services. However, there was some useful input from each group.

Regional Planning Agencies

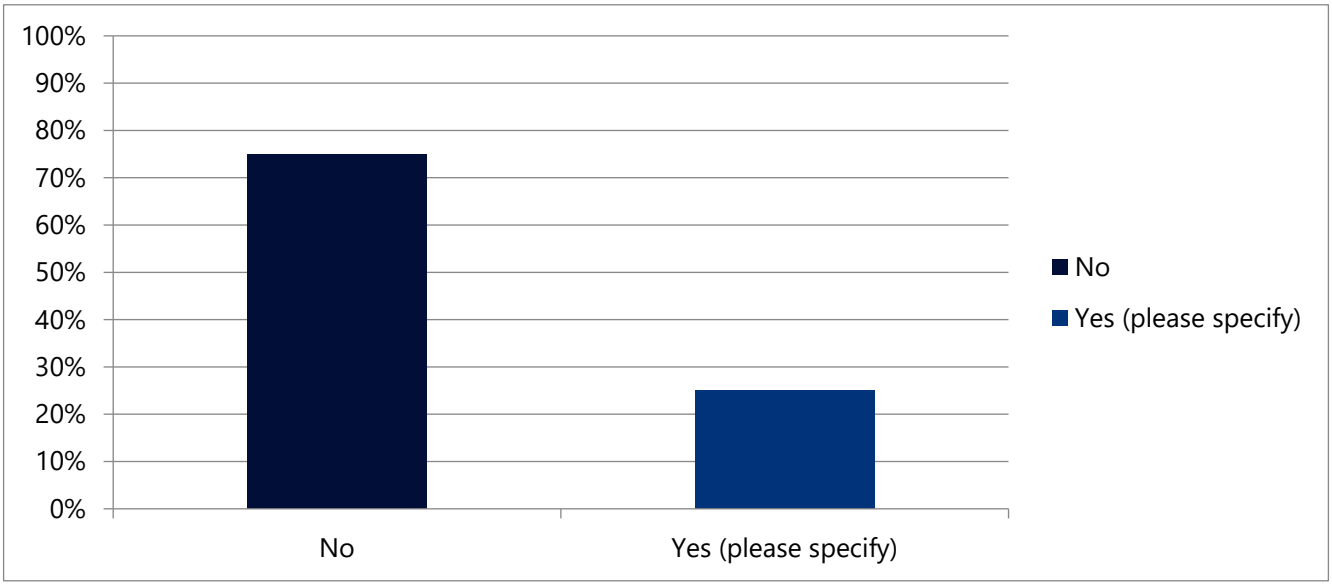
Survey of Regional Planning Agencies MD ICB

Question 1: Referring to the map and description in the cover letter, are you aware of the current intercity bus services in your region?



All four of the respondents answered yes when asking if they were aware of the current intercity bus services in their region.

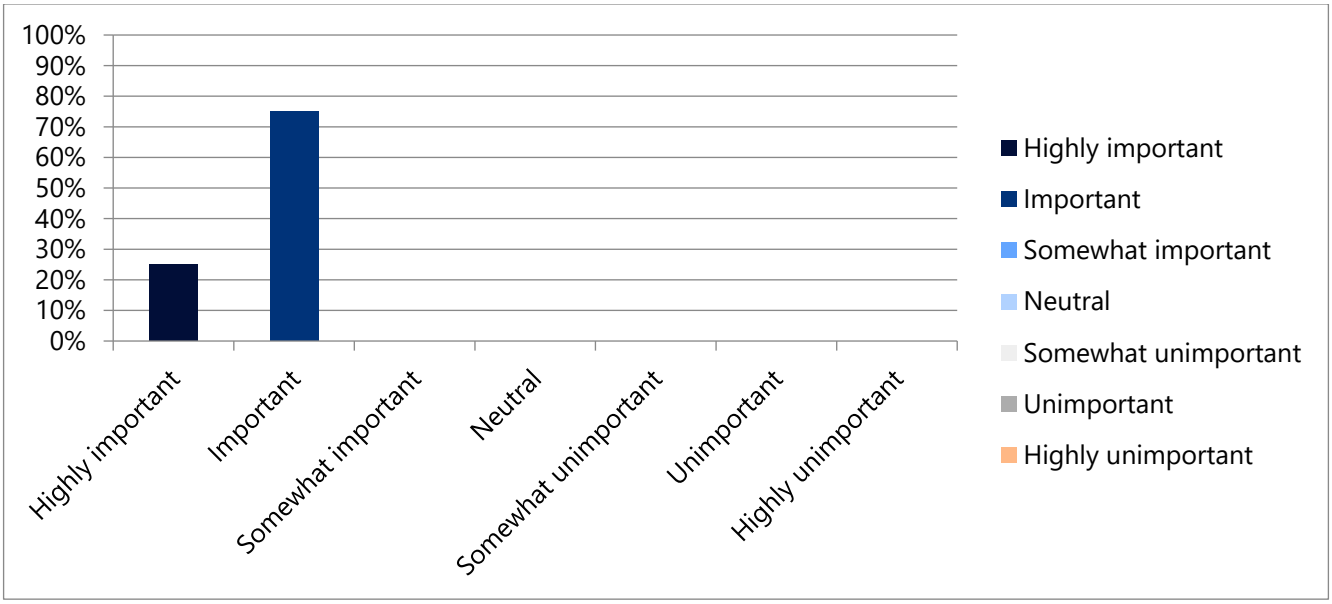
Question 2: Are you aware of other intercity services that are not shown on the map?



Comment: Downtown circulator transporting riders between Salisbury University and Downtown Salisbury

Three of the four respondents answered "No" when asked if they were aware of any intercity services not shown on the map. One respondent answered "Yes," and the comment can be seen above.

Question 3: Given the possibility that services may be reduced as the result of revenue losses resulting from the pandemic, how important is it to residents in your region to have intercity bus access?



Three of the four respondents answered "important" when asked how important intercity bus access to residents. One respondent answered "highly important."

Question 4: What intercity bus services would you prioritize?

Comment
1. Limited stop fixed routes to downtown Salisbury, which serves as a major activity center (employment, shopping, and access to nearby recreational opportunities).
2. Allegany County Transit and Washington County Transit.
3. Connections to regional and national transit.
4. Connecting to Washington DC and possibly to Richmond Virginia. DC is very important for both commuting and for connecting to Union Station. Richmond is not far away and providing an intercity connection through southern Maryland allows flexibility to travel on I-95 in Virginia.

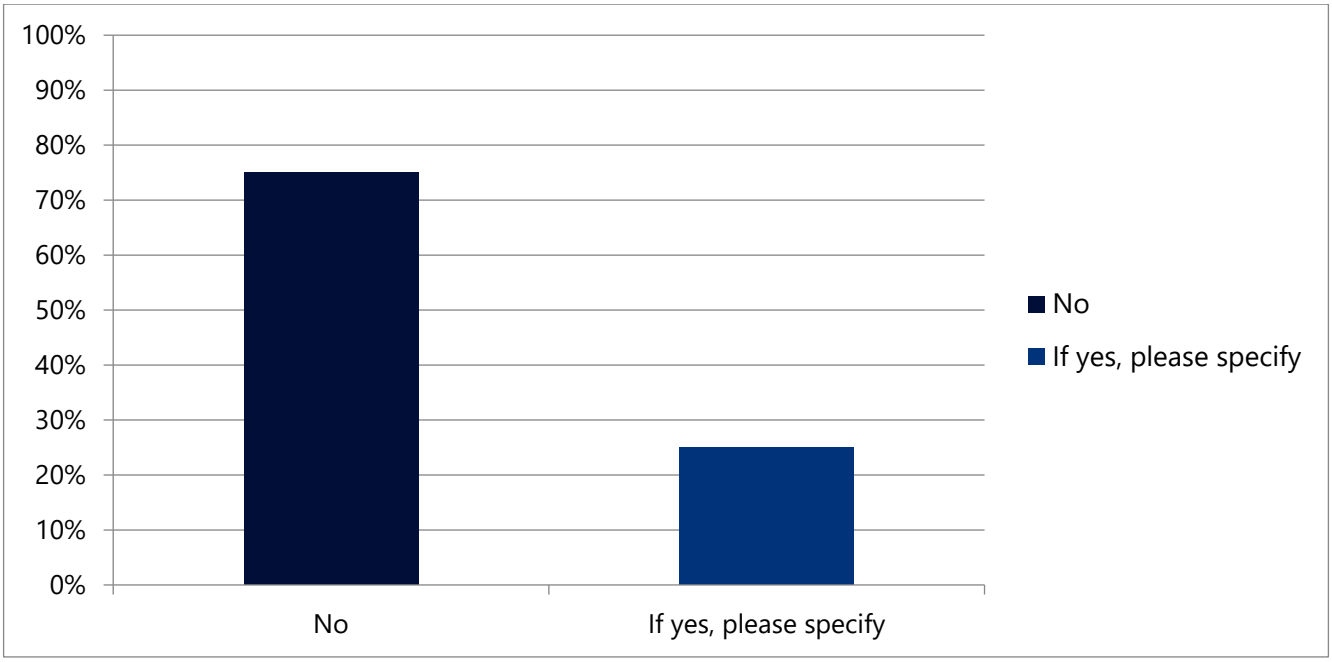
All four respondents left comments regarding which intercity bus services would be prioritized, including limited stop fixed-route services to downtown Salisbury, connections to regional and national transit, and connections to Washington, D.C.

Question 5: What destinations are the most important?

Comment
1. Medical, employment, retail, and recreation.
2. Downtown Cumberland, North Branch Industrial Park, Downtown Hagerstown.
3. Union Station and Richmond Amtrak Station.
4. Baltimore City: Penn Station, Along the i-95 corridor, connections to BWI Airport.

Again, all four left participants left comments when asked what destinations are most important. These areas included medical, employment, retail, Union Station, Amtrak stations and Baltimore City.

Question 6: Are there places (towns or cities) in your region that do not have intercity bus service even though there is a need for service from that location?



Comment: Expand existing services to Salisbury, which is the core/central city of the urbanized area and region as a whole.

Three of the four respondents answered "No" when asked if there were places that did not have intercity bus services. One respondent answered yes and stated that services to Salisbury need to be expanded.

Question 7: Are there particular groups in your region that currently use or would benefit from intercity bus access, for example college students, seniors with family in other locations, military personnel, persons needing specialized medical services?

Comments
1. Concur with your examples; however, I will add the opportunity of high school students especially during this pandemic and hybrid learning schedules.
2. All the groups mentioned.
3. We get phone calls from people who want to travel to union station or DC and cannot find a ride on the weekend. Persons who need specialized medical care.

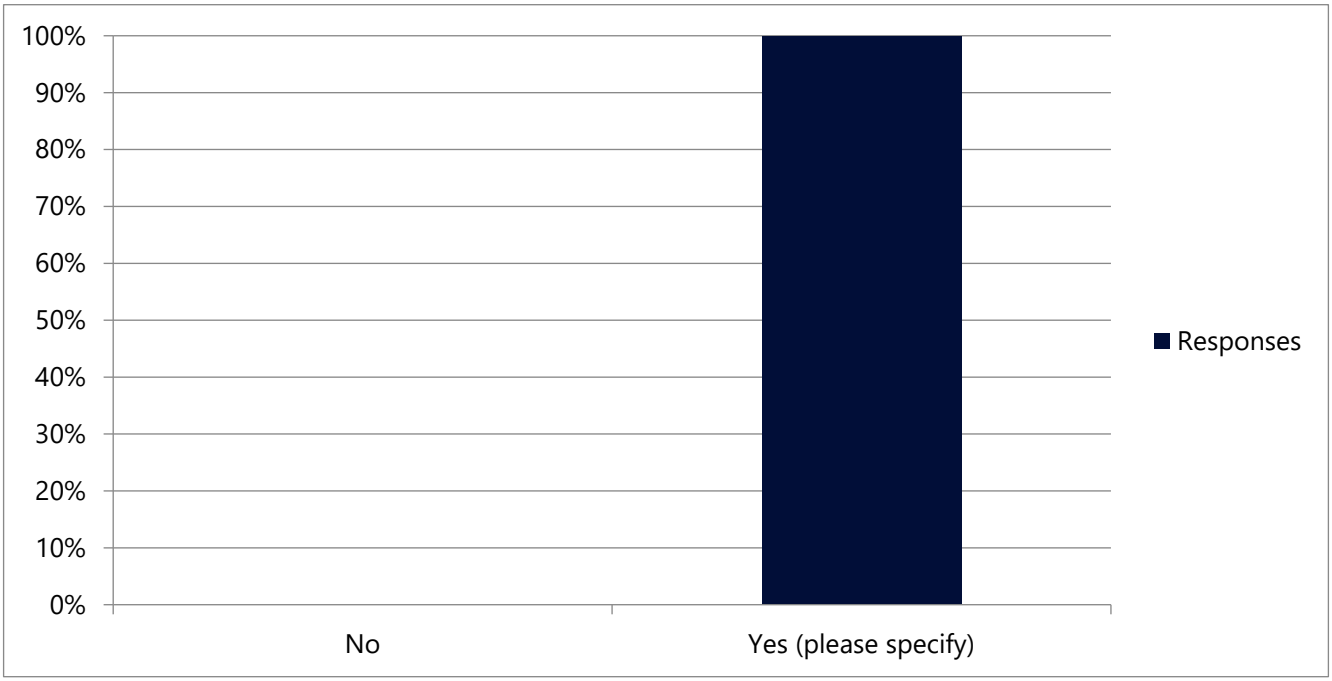
Only three respondents left a comment when asked if there were particular groups that required intercity bus services. Some of the comments included high school students, weekend service to Washington, D.C., and populations that need specialized medical care.

Question 8: Please offer any comments regarding other aspects of intercity bus services that you see as needing improvement, such as vehicles, facilities such as stations or park and ride lots, schedule information systems, wheelchair accessibility, marketing, etc.

Comment
1. ADA ramps to facilities. Improved parking and lighting.
2. Continues funding for ensuring a safe and efficient transit system. Exploring partnerships with community colleges for transit training (drivers, routing, etc.).
3. N/A

Three of the respondents left a comment when asked if other aspects of intercity bus needed improvements. The comments included ADA ramps for facilities, parking and lighting, continued funding, and partnerships with community colleges.

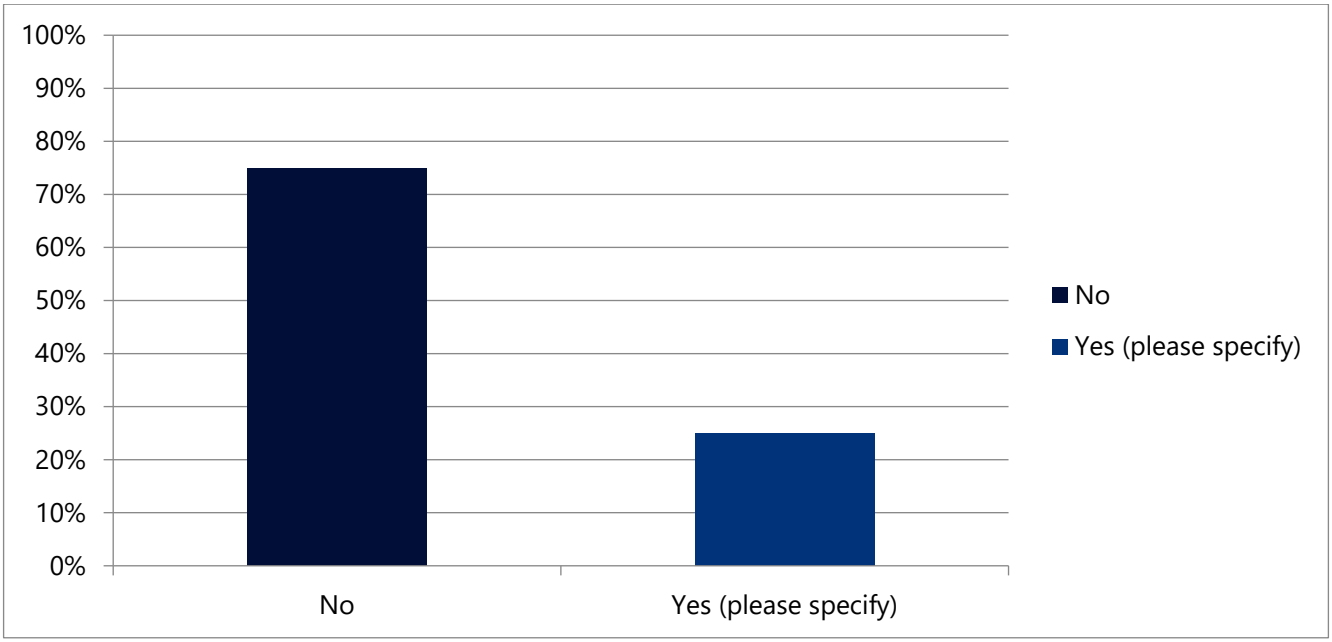
Question 9: Do you see any potential need or opportunity to expand or modify any transit services in your region to connect with existing intercity bus services or meet needs for connections to intercity bus services?



Comment
1. Bus service connecting DEL DOT and MD transit near Cecil Co. MD and the Delaware line.
2. Opportunity to increase intercity fixed route options. Integrating multimodal options to reduce last mile challenges.
3. People travelling to Baltimore or within the western Maryland area.
4. We could use a weekend bus to Union Station.

All four respondents commented when asked if transit needed any modifications to connect with existing intercity services. Some of the comments included bus service connecting to Delaware, intercity fixed-route options, multimodal options, and weekend service to Union Station.

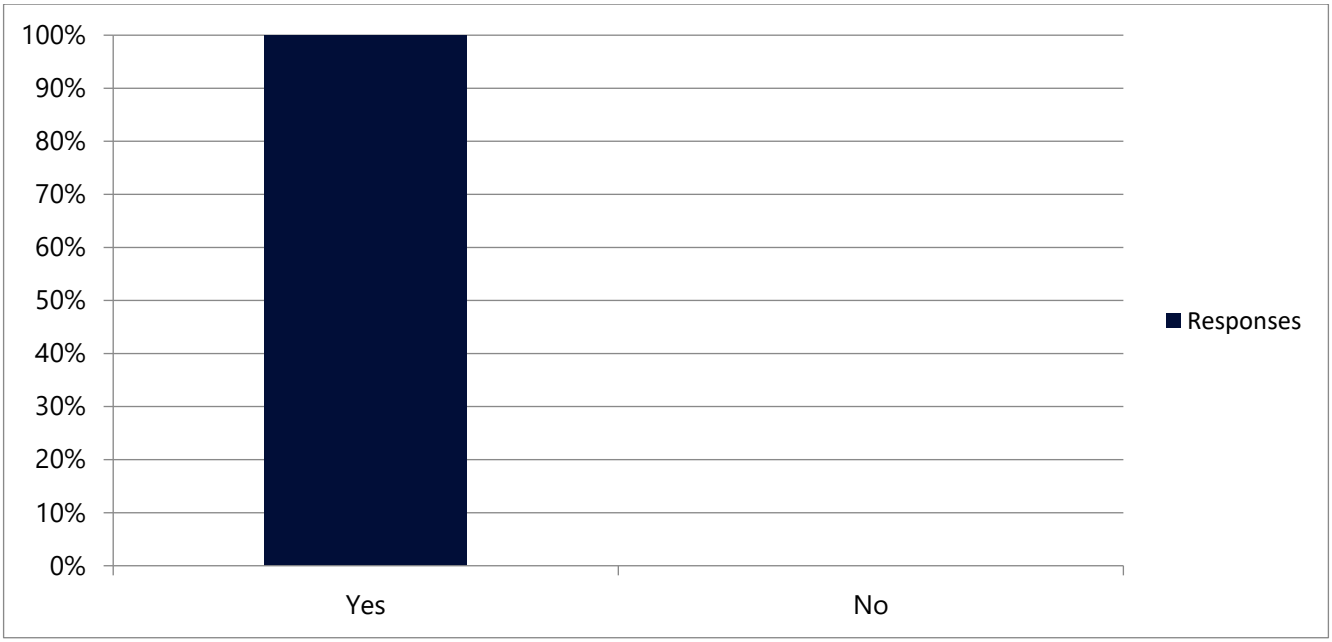
Question 10: Are you aware of any recent planning efforts or needs assessments that included intercity bus services? If yes, can you please share the report from that planning effort?



Comment: Shore Transit's Choice Ridership study funded by the Salisbury-Wicomico MPO.

Three of the four respondents answered "No" when asked if they were aware of any recent planning efforts or needs assessments that include intercity bus services. One respondent answered "Yes" and commented "Shore Transit's Choice Ridership study," which can be found here: https://cb8d0920-d949-40b9-9276-6d6919e1b853.filesusr.com/ugd/5c05e2_c2f4ae941c2042f3830a99807019babb.pdf

Question 11: Do you want to receive future notifications about this study, including any additional surveys, meeting notices, or study reports?



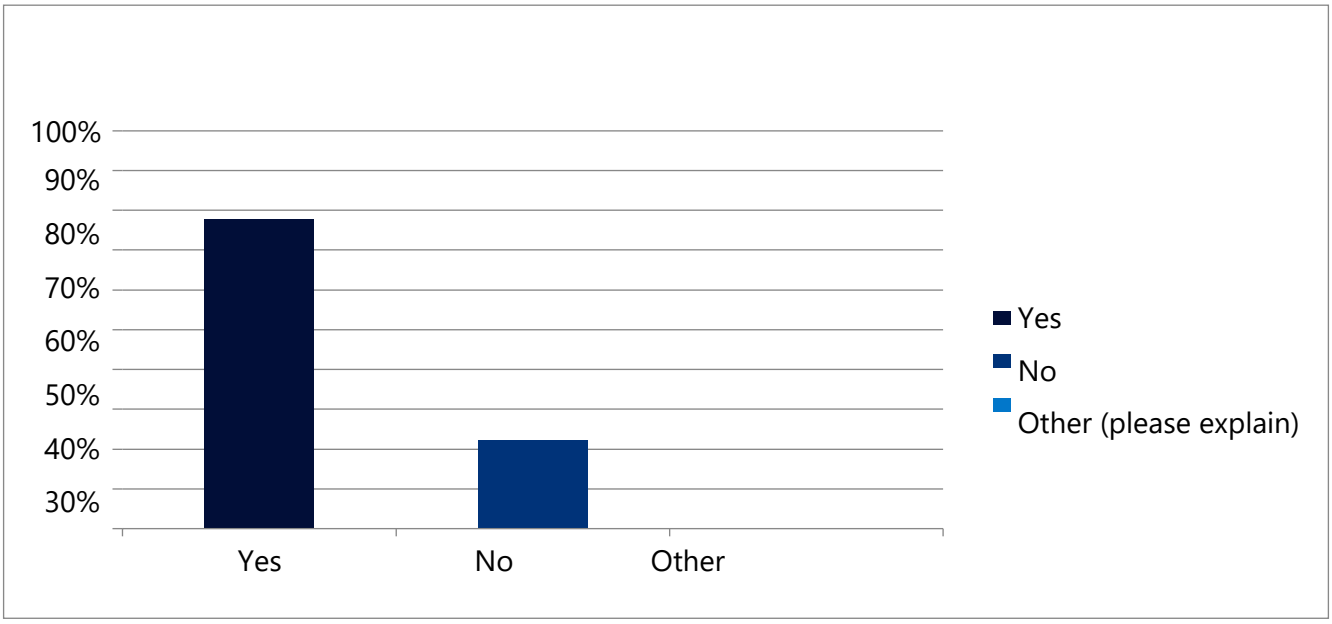
All four respondents stated that they would like to receive future updates about this study. Below you can find their contact information.

Question 12: If you answered yes to question 11, please provide your contact information

Name/Title	Organization	Address	Email	Phone Number
Monica White	Baltimore City DOT	Baltimore, MD 21202	Monica.white@baltimorecity.gov	443-202-8396
Keith Hall	Salisbury-Wicomico MPO	125 N Division St Room 203, Salisbury, MD 21803	Khall@wicomicocounty.org	410-548-4860
Ryan Davis, Business & Program Planner	TCCWMD	One Technology Dr Suite 1000, Frostburg, MD21532	rdavis@tccwmd.org	301-689-1300
Yolanda Hipski	TCCSMD	PO Box 745, Hughesville, MD 20637	yhipski@tccsmd.com	240-682-1108

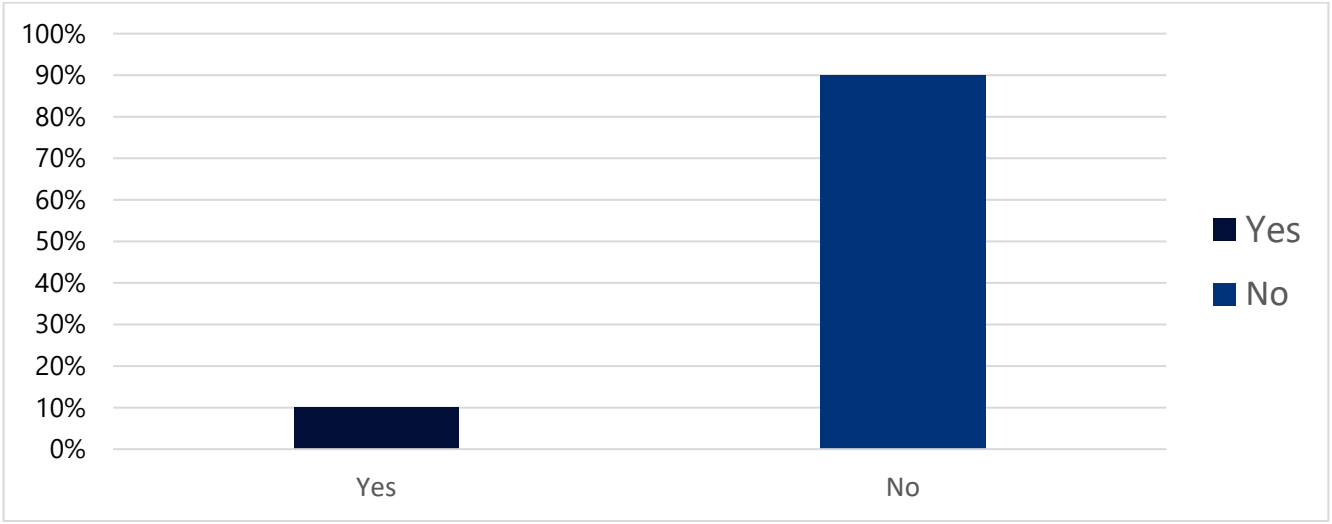
Locally Operated Transit Systems (LOTS)

Question 1: Referring to the map and description above, are you aware of any intercity bus services in your area?



Seven out of nine respondents answered "Yes" when asked if they were aware of intercity bus services in their area. Therefore, only two respondents were unaware of these services.

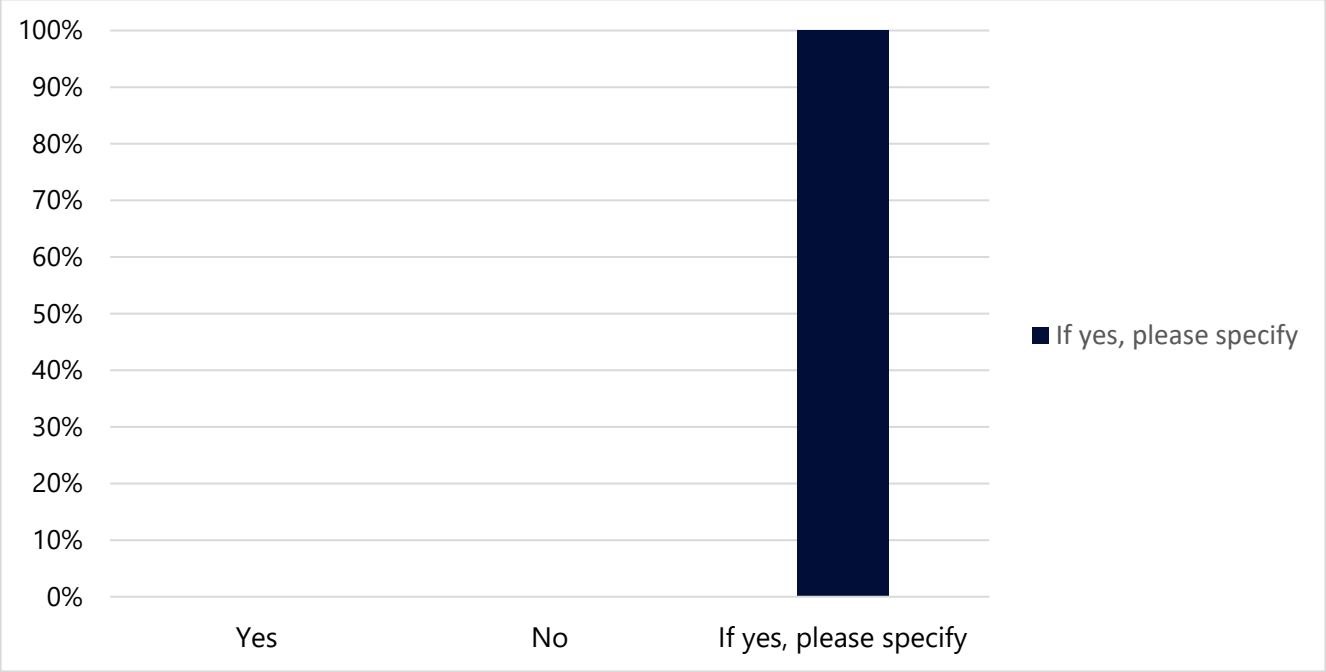
Question 2: Are you aware of any other intercity bus services not shown on the map?



Comment: Frederick has two 5311-funded routes not shown on the map.

Seven out of nine respondents answered "No" when asked if there were any services missing from the map, however one person answered "Yes." Their comment stated is stated above.

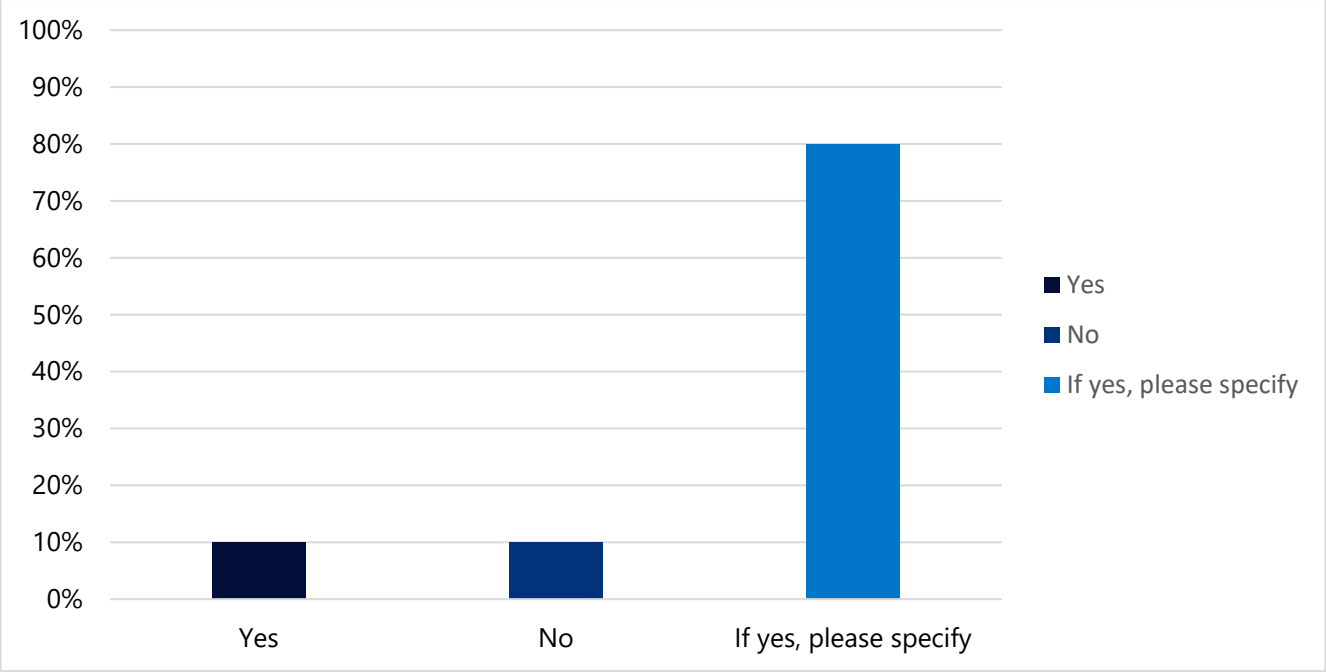
Question 3: As the provider of public transit services in your area, have you been asked from the public or advisory groups who want to know how to travel to more distant cities? If so, which cities?



Comments
1. Philadelphia, Washington D.C.
2. Washington, D.C.
3. Points with Northern Virginia
4. Baltimore, D.C., Gettysburg
5. Pittsburgh, Washington D.C.
6. D.C., Baltimore, NY
7. Connection from Harford County to the White Marsh area or Trade Point Atlantic Area
8. Service to Baltimore and Annapolis
9. Baltimore

Nine respondents answered yes and left comments, as presented above.

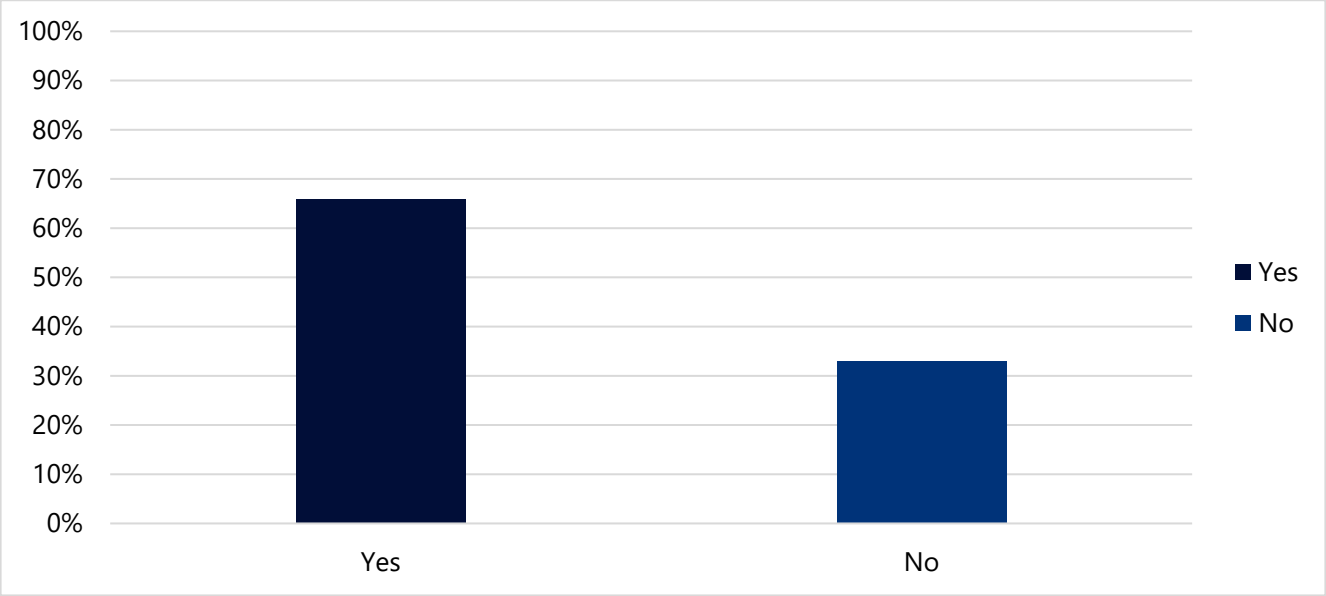
Question 4: Does your transit agency provide service to places that connect with intercity bus? If so, which intercity bus station?



Comments
1. Waldorf and La Plata
2. Norbeck P&R; Shady Grove Metro; Bethesda NIH; Rock Spring
3. Downtown Frederick MARC Station, Monocacy MARC Station
4. Hagerstown, MD
5. Near commuter stops in Harford County
6. Commuter bus from Queen Anne's County
7. Shore Transit Terminal Delmar, MD Rite Aid & Calvert St

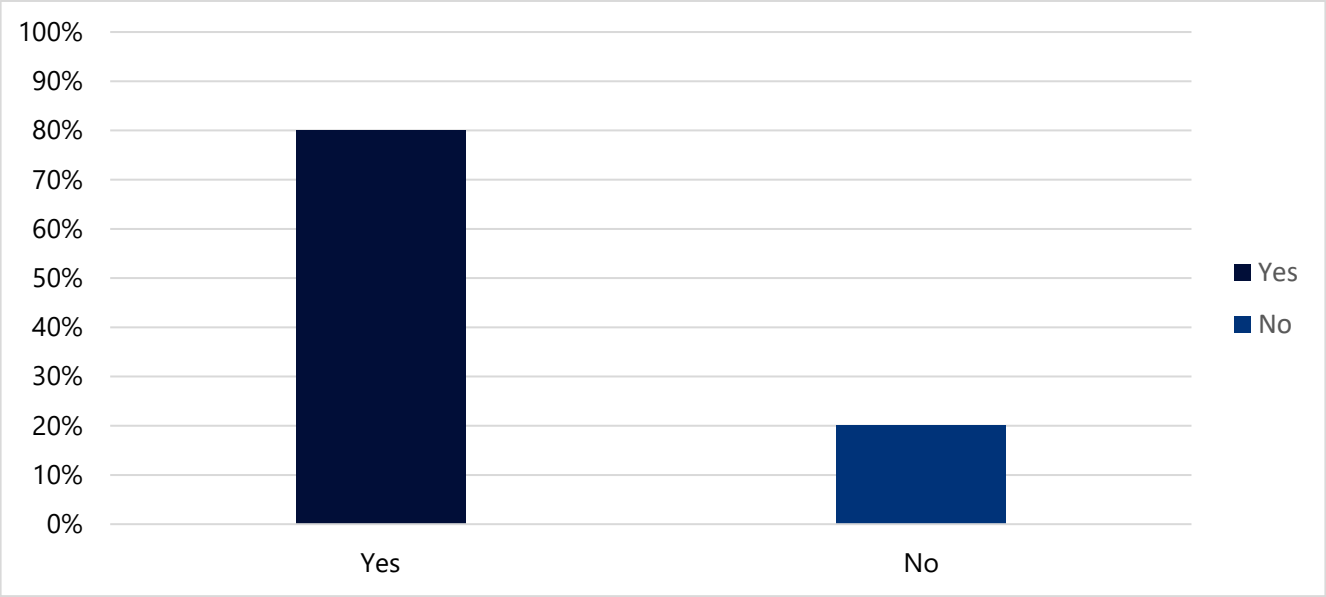
Seven respondents answered "Yes" to Question 4 and left a comment (as seen above). When asked if their services connected with intercity bus services, one respondent answered "Yes" and one answered "No."

Question 5: Does the transit system serve a park and ride with an intercity carrier stop?



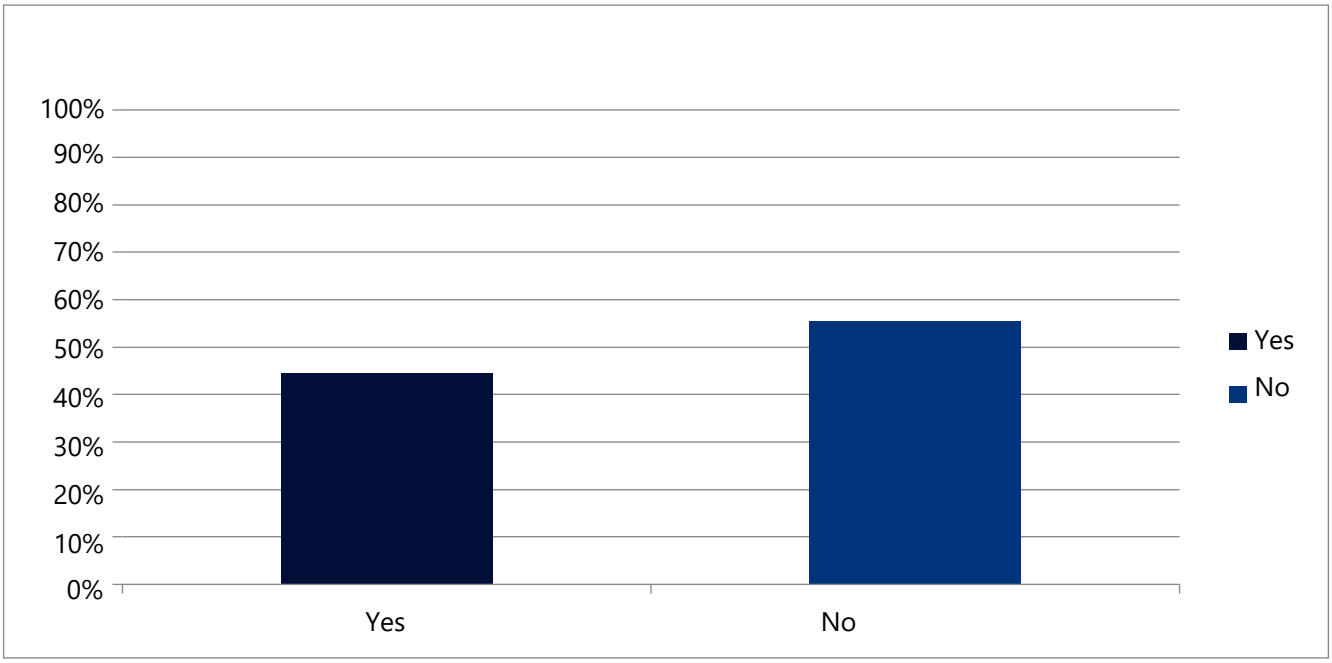
Six out of nine respondents answered "Yes" when asked if the system serves a park and ride stop that has an intercity bus carrier also present. Only three of the respondents answered that they do not serve shared park and ride stops with an intercity carrier.

Question 6: If the public asked about how to travel to and from distant cities, do you suggest any outside services, such as Greyhound, Bay Runner, or MTA commuter bus?



Seven of the respondents answered "Yes" when asked if they suggest using an outside service/intercity services. Only two respondents said "No."

Question 7: Are there any potential needs for an extension of local transit services to connect with intercity services?



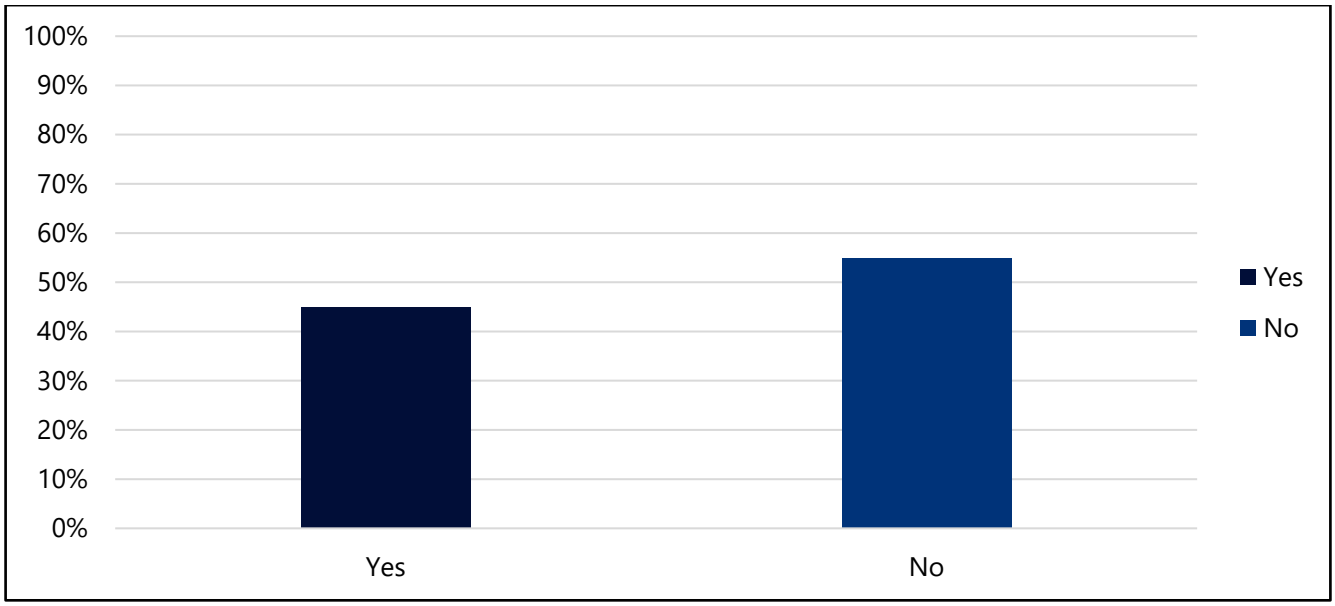
Four respondents answered "Yes" when asked if there was potential need for an extension in connection of local transit services to intercity services and five respondents answered "No."

Question 8: Are there places (towns or cities) in your region that do not have intercity bus service even though there is a need for service from that location?

Comments
1. Not that I am aware of.
2. Not that I can recall.
3. Yes. Many incorporated towns in Frederick County are requesting some sort of service.
4. Yes. Boonsboro, MD; Sharpsburg, MD; Smithsburg, MD.
5. Centreville Maryland to Middletown or Dover Delaware.
6. As previously stated Harford County to White Marsh area and similar with area around Trade Point Atlantic, key job centers.
7. No
8. No

When asked if there were any spots that need service, eight respondents answered and their comments can be seen above. Some of the locations identified as having intercity bus service needs include Boonsboro, Sharpsburg, Smithsburg, and Centreville, Dover (DE).

Question 9: Do you currently operate any long-distance services? (Scheduled or demand-response)



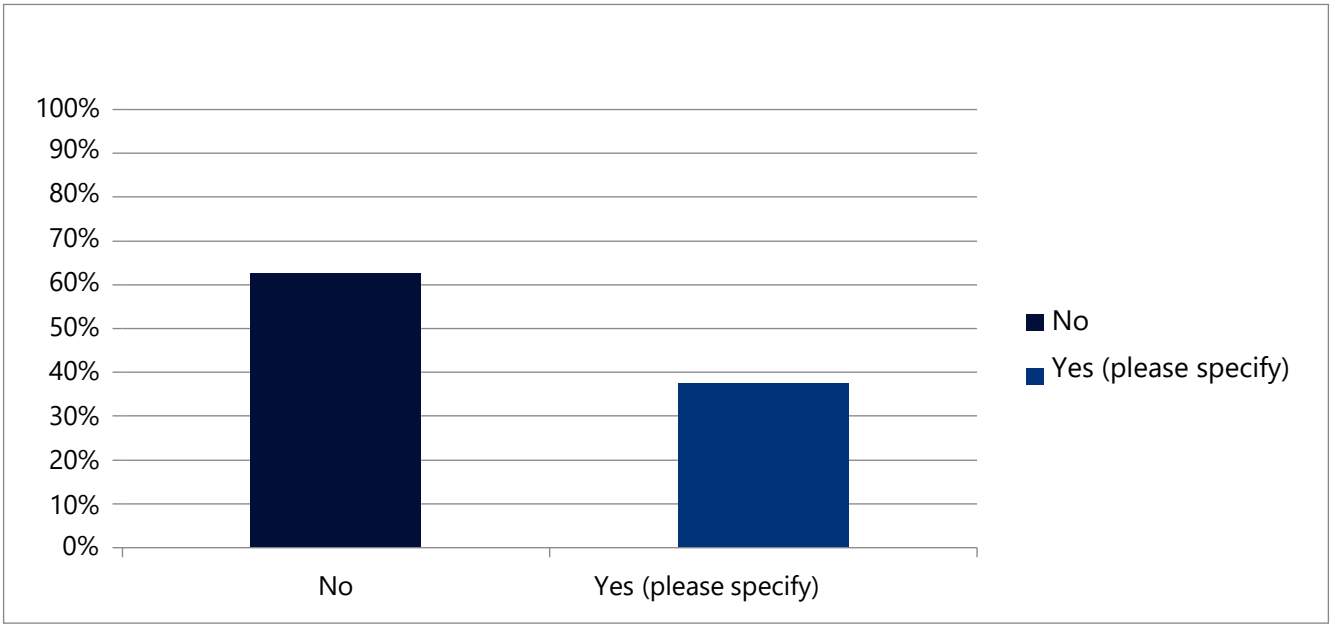
When asked if they currently operate long distance service, four respondents answered "Yes," while five answered "No."

Question 10: If you answered yes to question 9, please describe in terms of pickup points, destinations, stops served, how passengers make reservations, eligibility restrictions, schedules, fares, etc. (Attach timetables or other information if available).

Comments
1. Through volunteer drivers utilizing Cecil County mini vans, demand response clients can travel to out of Cecil County medical appointments throughout the region including Baltimore, Philadelphia, and Wilmington. The fare is $20.
2. City of Frederick 5311 routes to Emmitsburg (PA line), Brunswick (WV/VA line). Demand response trips from the extreme north end of the county to the extreme south end (45 min trip). $1.50/$2.00 fare.
3. Regular Transit Service to Easton, Annapolis and Chestertown MD.
4. N/A
5. Shore Transit Regional routes serve all towns on US 13, 113 & 50 within Wicomico, Worcester and Somerset Counties from 4:30 am to 2 am with 7 trips in the winter & 9 in the summer. $3 fare per boarding. Open to all without restrictions.

If they stated yes in the previous questions, they were asked to leave information regarding those long distance trips. The comments are presented above.

Question 11: Have the schedules, routes, or stops of these services changed since the onset of the COVID-19 pandemic? If yes, please indicate service levels before the pandemic.



Comments
1. Since the volunteer drivers are classified as at risk due to their age, services beyond 20 miles from the Cecil County Administration Building (which houses Transit) are not being accepted at this time.
2. MTA commuter bus is on a reduced schedule.
3. Our transit services have been greatly reduced at the start, but we now operate at 50% capacity and tentative plans to resume 100% full service on March 1, 2021, since all our associates who signed-up will have both vaccine shots. We are awaiting HC administration approval.

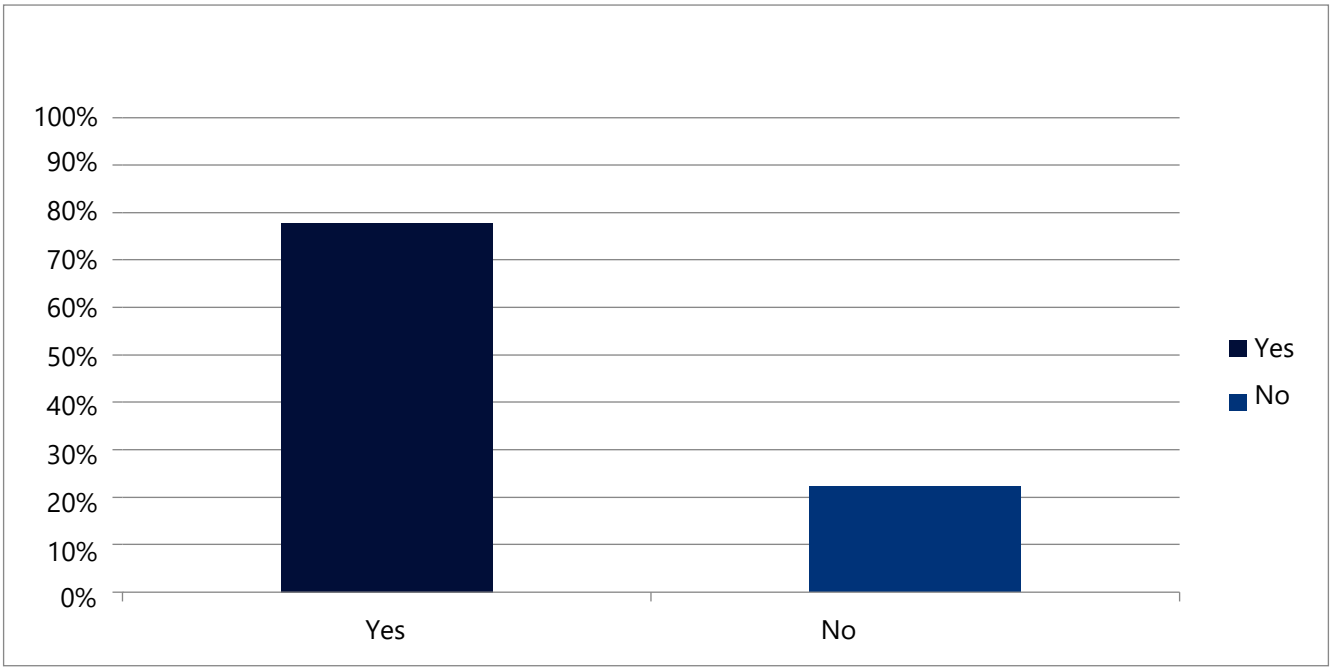
When asked if the routes have changed due to the COVID-19 pandemic, five answered "No," while three answered "Yes." Comments can be seen above. One respondent said volunteer drivers are part of the population that is at risk, so services do not extend beyond 20 miles. Another respondent commented that MTA commuter bus services have been reduced. The third respondent commented that as of March 1, 2021, they predict that services will return to 100%.

Question 12: How/where do you make information of these services available to users? Websites, brochures, posted schedules, etc.

Comments
1. Websites, brochures, social media, and presentation at community based organizations.
2. Our website.
3. Websites, brochures.
4. Website, printed brochures, social media, hard copies posted strategically.
5. All of the above.
6. All listed, RouteShout 2.0, Moovit, Website, Blackboard Connect. Also planning and have radio ad's set to start when resume utilizing our APTA sanitization certification to assure our riders the efforts given for everyone's safety.
7. N/A
8. All the listed and attended community meetings with schedules and info before COVID.

When asked how they make information available to customers, eight respondents gave an answer. Many comments included the use of websites and brochures.

Question 13: Do you want to receive future notifications about this study, including any additional surveys, meeting notices, or study reports?



Seven of the respondents answered "Yes" when asked if they wanted to receive additional information and two stated "No."

Question 14: Contact Information

Name	Organization	Address	Email	Phone Number
Suzanne Kalmbacher, Transit Chief	Cecil Transit	200 Chesapeake Blvd, Elkton MD, 21921	skalmbacher@ccgov.org	410-920-2383
Jeff Barnett, Chief of Transit	Charles County	200 Baltimore St, La Plata MD,	barnettj@charlescountymd.gov	301-934-0102
Deanna B Archey, Senior Planner	Montgomery County DOT	101 Monroe St 5th floor, Rockville, MD 20850	Deanna.archey@montgomerycountymd.gov	240-777-5828
Roman Steichen, Director	Transit Services of Frederick County, MD	1040 Rocky Springs Rd, Frederick, MD 21702	rsteichen@frederickcountymd.gov	301-600-3538
Director	Washington County Transit	1000 W. Washington St, Hagerstown, MD 21740	transit@washco- md.net	240-313-2750
Maynard Nash	Queen Anne's County – County Ride	312 Safety Dr, Centreville, MD 21617	mnash@qac.org	301-789-3561
Gary R Blazinsky, Administrator	Harford Transit LINK	1311 Abingdon Rd, Abingdon, MD 21009	grblazkinsky@harfordcountymd.gov	1-410-612-1620 Ext: 7475
Sandy Wobbleton, Transportation Division Chief	Calvert County Public Transportation	175 Main St, Prince Frederick, MD 20678	Sandra.wobbleton@calvertcountymd.gov	410-535-4268
Brad Bellacicco, Director	Shore Transit	31901 Tri-county Way, Salisbury, MD 21804	bbellacicco@shoretransit.org	410-341-8951

Study Advisory Committee-Interviews

A study advisory committee (SAC) was convened for the intercity bus plan update with participants from MDOT MTA, regional planning organizations, rural transit operators, intercity bus carriers, and other stakeholders. A list of SAC members is provided in Appendix B. The purpose of this group was to serve as a sounding board for the planning team. SAC members were asked to:

- Identify and discuss key issues related to the project.
- Provide input and feedback on MDOT MTA goals and objectives for the intercity bus program.
- Provide input and feedback on study findings and planned priorities for intercity bus services.

Unfortunately, participation of the invited members at the planned virtual meeting was minimal, and the study team called and interviewed members individually to the extent possible, looking for the same input. Many of the same people had recently participated in the regional meetings for the Statewide Transit Plan or had completed the surveys sent to the regional planning agencies and the LOTS operators, and so may have felt that they had already addressed these issues. Through the effort to contact each Study Advisory Committee member directly, each had the opportunity to provide input on unmet needs, on the currently funded services, and on other program aspects. Key interviews were held with representatives from Cecil County, Harford County, and the Shore Transit region on the Eastern Shore, and a meeting with the Tri-County Council's Regional Transportation Coordination Committee.

For each interview, the study team provided background information and a set of questions. The background information included:

- Information about Section 5311(f) and its relationship to the overall federal funding program for rural areas – the 15 percent allotment for rural intercity projects (not Cares Act) – comes from 5311 funding.

- Purpose of this study – To determine the unmet needs for rural areas that could be met with intercity network – What is missing (stops, frequency, timing, etc.)?

- What we mean by intercity bus – It is not commuter services, and it is not long distance medical trips (or other human service transportation), but scheduled service open to the general public for any trip purpose. In addition, there is a focus on connectivity to the national intercity bus network (shared stations, coordinated schedules, and interline ticketing).

- A description of the two subsidized intercity bus routes in Maryland:
  - Baltimore to Grantsville (operated by Bay Runner Shuttle)
  - Washington, D.C. to Wilmington local via U.S. 1 and 40 (operated by Greyhound)

- An overview of the current demographic needs (based on census data).

With that as context, the following information came from interviews.

Harford County

Interview with Gary Blazinsky, Administrator, and Jodi Glock, Administrative Supervisor, Harford Transit LINK. 5/20/2021.

In this discussion with the managers of the local public transit system in Harford County, a number of different issues were raised about the role of intercity bus in serving the residents of the county. Based on their knowledge of the county and its transit users, they believe that less than 1 percent of residents within the county knew about Greyhound bus that is funded under Section 5311(f)—despite its stops in Edgewood, Aberdeen and Havre de Grace. They were more aware of the Megabus service between Baltimore and New York, and its stops at White Marsh (service now suspended) and the University of Delaware in Newark. They acknowledged a potential need for transit to provide connections for the military base in the county, despite issues with based access and security—but at the same time felt that better local connections are the answer to needs they perceive such as commuter service to Baltimore County and Baltimore City, and there would be issues with first-mile/last-mile service on trips such as long distance medical trips to Baltimore. When apprised of the Greyhound schedules they felt that the service should be morning southbound toward Baltimore, but this was mentioned in the context of providing service for commuters.

There is no mention of the Greyhound connections on the LINK information sites, and they are unaware of any other marketing or informational effort by Greyhound or MDOT MTA. Even putting up signs would be useful. They were not aware of the location of the Greyhound stops (1712 Pulaski Highway, Edgewood; Aberdeen MARC station, and the Seven-Eleven at 911 Ontario Street in Havre de Grace) and thought there would be benefits from co-locating Greyhound with their improved stop/shelter locations to facilitate transfers.

Cecil County

Interview with Suzanne Kalmbacher, Transit Chief, Cecil County Transit, 5/14/21.

Suzanne Kalmbacher from Cecil County spoke about the unmet transit needs of Cecil County, and how they relate to the existing intercity bus. Her observations were that there were very few riders to and from Cecil County on the Greyhound services, based on not observing anyone waiting at the Greyhound stops. From Cecil County there is more interest in connections to Delaware, and potential travelers use park and ride lots and the SEPTA trains to connect at Wilmington. Also, there is DART bus service to Wilmington from Elkton.

She felt that there is potential for co-locating the Greyhound stops with Cecil Transit, though the current Elkton stop has too much congestion and should be moved in any event. The main transit hub in Elkton is at the Big Elk Mall, which is 3.5 miles to I-95, and that would provide more connections for the intercity services. There is planning underway for a new transit hub in the northeast area which could include Greyhound and perhaps Megabus. They are securing the site, and plan to start on the facility by FY 2022.

Cecil Transit tried running connecting bus service linking SEPTA trains in Newark with MARC service in Perryville, but there were very few riders. They believe potential riders were concerned about the limited frequency and the possibility of being stranded and would prefer to ride a single-seat mode from Newark to Baltimore. MARC service from Perryville to Baltimore is limited in terms of frequency, and there is a need for non-peak connections. Better information about regional connections (such as information and a link on their website) would be advisable in the short term, with shared stops as Cecil Transit improves its stop locations.

Shore Transit

Brad Bellacicco, Executive Director, Tri-County Council of the Lower Eastern Shore, 6/3/2021.

Tri-County Council is the organizational home for Shore Transit, the regional public transit provider. Shore Transit is also the Greyhound agency for Salisbury, Maryland, and the Shore Transit terminal also serves as the Greyhound bus station. Shore Transit is an interline partner with Greyhound—until the pandemic Shore Transit carried Greyhound passengers to Ocean City, replacing former Greyhound service. Currently Greyhound is not operating between Baltimore and Salisbury, and the only Greyhound service for Salisbury is on a route between Richmond/Norfolk and New York, which serves Salisbury outside the Shore Transit service hours (so there is no connection). When asked about locations not currently served by intercity connections, Mr. Bellacicco pointed out the lack of service to Baltimore and the need for regional service to Denton, Delaware.

When discussing the utilization of the current intercity bus network, he said many of the respondents stated that the services are not promoted within the community and many citizens are unaware of the services. Another complaint that many respondents had was with current frequency of the system, mentioning that there were gaps in services in the middle of the day. Some respondents mentioned an overlap with the MARC train, especially in the morning, which added to the lack of customers at the intercity bus stops.

Mr. Bellacicco stated that the availability of intercity bus service is important, and that suspension of the Greyhound service on the Eastern Shore has been felt by the community and is highly important to restore. He stated that there are current options (Bay Runner Shuttle and the north-south Greyhound service) but that neither offers service comparable to the former Greyhound service in terms of fare or travel time—Bay Runner Shuttle fares are much higher than Greyhound, and the available Greyhound routing takes Eastern Shore travelers going to Baltimore either south through Norfolk and Richmond or north through Wilmington, with a change of buses required. People who need to get to Baltimore can do it without the direct Greyhound service but that takes much longer. Shore Transit has had to work around the lack of services from Greyhound by having a supervisor drive riders to/from the Bay Runner stop. Shore Transit has a good working relationship with Bay Runner Shuttle and could work with them if they took over the low fare Greyhound route, particularly if access to the service was expanded in terms of frequency.

In the summer, J1 and J2 Visa holders who work in Ocean City use Greyhound often, and Shore Transit honors the Greyhound tickets for the link between Salisbury and Ocean City. For these reasons it is

important that the previous intercity bus connection from Salisbury to Baltimore be reinstated and maintained. Other regional needs are met by the Shore Transit routes covering the three counties, and the Delmarva Community Transit (DCT) service between Cambridge and Salisbury on Route 50, but frequent service from Salisbury to Baltimore connections is needed.

Mid-Shore Regional Council - Talbot, Caroline, and Dorchester Counties

Scott Warner, Executive Director, Mid-Shore Regional Council, 5/17/2021.

Mr. Warner's organization is the home of MUST (Maryland Upper Shore Transit, the regional five-county coordinated transit system that services the citizens of Caroline, Dorchester, Kent, Queen Anne's, and Talbot counties. MUST's transportation providers include Delmarva Community Transit (DCT) and Queen Anne's County – County-Ride.

Mr. Warner spoke about the issues of transit options in his area, including access to the intercity stops serving Kent, Caroline, Talbot and Dorchester counties. Although MUST provides transit service from Easton to Denton, a possible intercity/regional route could include that link as part of a route stretching from Dover (DE) to Cambridge, providing connections to intercity services and to the new hospital and shopping in Cambridge. Low-income workers have used DCT to commute between Cambridge and Salisbury, illustrating the potential.

Mr. Warner stated that there needs to be better public information about the available intercity services. MUST provides public information about regional fixed route services through its website, and kiosks at public places. But intercity service options are not advertised to the general public, and not included in the MUST website or other information--no one has ever mentioned intercity bus in their brochures, or ever talked about intercity bus availability or needs as part of public outreach. A major part of developing intercity options should be developing public awareness.

Tri-County Council Regional Transportation Coordination Committee

January 13, 2021 – Notes

Bruce Hojnacki (MTA), Joel Eisenfeld (KFH), George Clark, Jeffrey P. Barnett, Melinda Lyon, Nancy Huggins (MTA), Steve Clontz, Tammie, Yolanda Hipski, Corae Young, Allison Swint

Discussion initially focused on how difficult it is for riders such as disabled veterans (in St. Mary's County) to use commuter or intercity services to access VA medical facilities, both in terms of information about routes, schedules and fares, and in terms of first-mile/last-mile access. Another issue raised was the fact that the MDOT MTA commuter services require exact change and do not use either of the regional transit cards. In that sense an interlined intercity option could offer a benefit in that users would have one ticket and it would be prepaid.

Some of the unmet needs identified are regional in nature:

- St. George's Island to Point Lookout Road (cannot get to any type of local transit)
- Cobb Island (Charles County)
- Areas in Charles County

It was noted that unfortunately when some new services are implemented, they do not get utilized and so cannot be continued. Another need discussed was transportation for youth, though not specifically related to intercity or commuter services.

The Coordination Committee has not been focused on the MDOT MTA commuter bus services in the region. At the moment it is not clear how those services will be affected by the increase in teleworking created by the COVID pandemic. Pre-COVID 8 percent of workers teleworked, and it is estimated that possibly 35 percent will continue teleworking more than three days a week (and it is not known what percent will be full-time and what will be part-time). MTA commuter buses are running at 12 percent capacity at the moment.

To access intercity bus service in Washington, there are two routes that go to Union Station. MDOT MTA 735 Charlotte Hall/Waldorf-DC has nine arrivals between 5:57 a.m. and 8:49 a.m., and five southbound departures from 3:52 p.m. to 5:27 p.m.: and MDOT MTA 850, Prince Frederick/Dunkirk-Suitland-DC with five northbound arrivals at E Street and North Capitol between 6:03 a.m. and 8:15 a.m., and three southbound departures from Columbus Circle between 4:00 p.m. and 5:00 p.m. These stops are on the street outside of Union Station which would be clearly in view. Other MDOT MTA commuter bus services pick up and drop off elsewhere in downtown, where a knowledgeable passenger could ride one or two stops on the Metro to access Union Station. The critical factor is knowledge about these connections—they are not in the Greyhound or Amtrak ticketing systems, nor does MDOT MTA note the possibilities, but because there is GTFS data for MDOT MTA commuter buses and most intercity services (Megabus, Flixbus, Greyhound, Amtrak) an internet user can discover the trip possibilities and identify the connections.

Private Provider Consultation

Current intercity bus operators receiving Section 5311(f) funding were asked to participate in one-on-one interviews with the project team. These interviews were designed to solicit input on aspects of the MDOT MTA program that are working well or could use improvement from an operators' perspective, to review the current services, to identify unmet needs or the need for additional funding to maintain or restore service in the wake of the pandemic. Appendix C presents the consultation request letter.

Representatives from Bay Runner Shuttle and Greyhound Lines agreed to be interviewed for the plan update. All carrier representatives were provided with the survey questionnaire, presented in Appendix B, which served as the basis for the discussion. Insights collected during these interviews have been incorporated into the following summary section below.

Bay Runner Shuttle

Bay Runner Shuttle Consultation Interview with Caroline Presburg, April 21, 2021

Ms. Presburg reviewed the Technical Memorandum No. 1 description of Bay Runner Shuttle services in Maryland and provided a number of corrections and additions that will be incorporated into the draft final report. The key points she made included the clarification that Bay Runner is really a shuttle service, not an airport limousine, and that it has continued to provide service through the pandemic. Prior to the onset of the COVID-19 pandemic it operated seven daily roundtrips from the Eastern Shore, and as of May 15 had reinstated five schedules, though riders are advised to call ahead to make sure the schedule they want is running the day they need it. Also, she said that Bay Runner ticketing is fully interlined with Greyhound and as an Amtrak Thruway service for both the 5311(f) funded western service and the unsubsidized eastern shore services. However, because there is a possibility that a particular Bay Runner Shuttle schedule will not operate on a given day, Amtrak closes out the possibility of getting a reservation involving Bay Runner 15 to 18 hours before the desired trip time so that they can let Bay Runner know if they have an Amtrak passenger and make arrangements for the service to operate that schedule. Bay Runner can also let Greyhound know if a particular schedule is not running so they can take it off their list of available connections for that trip.

Another issue discussed is ADA accessibility. Bay Runner has used Section 5311(f) capital funding to purchase a fully accessible bus for use on those services. The vehicle cost approximately $70,000, and because it is larger (requires CDL) it is estimated that it will cost more per mile to operate, potentially raising the cost per mile to $3.50 or $4.00. Other issues with the accessible vehicle include the fifteen-minutes of additional dwell time for using the lift, and the potential need for a different pickup spot at the airport (which may entail additional costs).

In terms of unmet need, Bay Runner does not think there is a need for both its service and Greyhound on the Eastern Shore, but there are a number of potential riders who need the low fare Greyhound offers. Bay Runner would be open to operating a service with a different branding and low fares, if it was funded. The distinction in brands is attractive to Bay Runner. The other unmet need they have identified is on the western route, connecting from Frederick to the Washington, D.C. region—perhaps to Shady Grove Metrorail station.

Greyhound Lines

Consultation Meeting with Tim Therrian and John Baranowski of Greyhound Lines, Inc., and Stephanie Gonterman of Isaacs and Associates (consultants to Greyhound) – June 29, 2021.

An initial discussion covered the Greyhound plan for reinstating the Baltimore-Salisbury-Norfolk schedule 420, which had been suspended during the pandemic. Greyhound staff indicated their plan was to reinstate service on July 28 (subsequently Greyhound published Table 420, reinstating the New York-Salisbury-Norfolk-Richmond overnight bus, but not the Baltimore-Salisbury-Norfolk daytime service). Also, the Baltimore-Harrisburg service has been reinstated effective June 29.

The Technical Memorandum No. 1 analysis of Greyhound's current Section 5311(f) route between Washington, D.C. and Wilmington, DE, was reviewed, including the data tables and performance analysis. Greyhound felt that the ridership shown underrepresented the actual, and immediately sent ticket sales data for all of 2019 showing higher ridership levels. It was determined that the data Greyhound sent to MDOT MTA in support of invoices showed only riders boarding and alighting on the funded segments, so passengers to/from Washington, D.C. or Wilmington were not included. Also, Greyhound has begun operating the funded section with a full size coach that originates/terminates in New York City, so there are more passengers on the bus from overflow passengers between New York and Washington, resulting in higher passenger loads (in the 20s – 40s). This is a recent change not reflected in the 2019 invoice data used in the Chapter 3 analysis. The actual ridership is about 40 percent higher than would be evident from the invoice data.

In addition, Greyhound's data on the actual ticket origin-destination for riders on this route suggests that it is truly intercity with many riders traveling to/from locations far beyond Baltimore or Wilmington—it meets the needs of persons making long distance trips. For example, on January 1, 2019, ticket origins for trips going to/from places on this route included New York City; Raleigh, NC; Bakersfield, CA; and Tucson, AZ as well as Aberdeen, Edgewood, College Park, Laurel, and White Marsh.

Greyhound noted some of the issues with the Baltimore-Salisbury-Norfolk-Richmond route—that the ridership (in Virginia) is heavier between Richmond and Norfolk than on the shore. Given light ridership and current issues in finding enough drivers, buses and mechanics Greyhound might defer this service, or drop it in the future (unless subsidized). In terms of its previous performance, Greyhound stated that it would not have been running if it did not cover its variable operating costs.

Greyhound suggested that they are open to the possibility of having Bay Runner operate the Baltimore-Salisbury route and interline with Greyhound, perhaps under a grant solicitation that identified that as one of MDOT MTA's service priorities. A concern would be that Greyhound would want any service operated by Bay Runner (or any other carrier) to operate on schedules that connect with Greyhound and would be fully interlined as far as ticketing goes—this would be a condition of providing in-kind miles for match. The data presented for the Washington-Wilmington route shows the importance of being part of the national network. Any other carrier operating as an interline partner would need to be fully ADA accessible.

Greyhound representatives asked if Maryland was thinking of repurposing the funding from the Washington-Wilmington route to Baltimore-Salisbury. Greyhound representatives noted that Census issues could affect eligibility of different routes, and that Federal transit program reauthorization could add funding that would allow Maryland to fund all three routes.

Greyhound stated that they would be happy to move any stops on the existing Section 5311(f) routes to improve connections with local services—but would need some technical assistance to identify the locations and if there are any facility or signage needs.

Conclusions

Despite the issues resulting from the COVID pandemic, the study team was able to gather significant input regarding Maryland's needs for intercity bus service. This input affects the potential routes/coverage, the need for service, strategy for the program, and the need for improved information.

Information Needs

Despite efforts to make sure that stakeholders understood what is meant by intercity bus service, which services are provided in Maryland, which ones are funded by MDOT-MTA, many of those contacted identified local or regional needs, primarily for medical or work trips. They were largely unaware of the network of services that exists to connect residents with places beyond the immediate region, and definitely unaware that MDOT MTA has a role in supporting some of these services. There is a need to improve information available to the public about potential connections—whether that is through including links to providers/services in the MDOT MTA website or through other means is not clear. It may be that branding some services would increase the visibility and awareness—certainly this has been the case in some other state programs.

Also, requiring intercity carriers (and local transit providers) to develop, maintain, and make available GTFS data on services would facilitate discovery of these options by users, mobility managers, and transit providers.

Routes

Setting aside many of the comments about potential markets or service needs that are local or regional, a general list of desired coverage emerging from these discussions includes:

- The existing Grantsville-Baltimore route operated under Section 5311(f) by Bay Runner.
- The existing Washington, D.C. – Wilmington, DE route operated under Section 5311(f) by Greyhound Lines.
- Baltimore to Salisbury service, with connectivity to Shore Transit—the suspended Greyhound service, also operated by Bay Runner Shuttle at higher fare levels.
- Washington, D.C.—Annapolis (connecting to Eastern Shore service)—not currently operated.
- Frederick to Washington, D.C. (perhaps to Shady Grove Metrorail), connecting to/from service to Western Maryland, not currently operated.
- Baltimore-York-Harrisburg, currently operated by Greyhound, with Rabbittransit commuter service from York to Baltimore.

- Southern Maryland corridors to intercity connections in Washington, D.C./Union Station—two existing MDOT MTA commuter routes provide service to Union Station as weekday peak hour commute routes.

Other links were identified, but usually in the context of regional commute needs, such as commuter bus service from Hagerstown to/from Frederick, or services from Harford to Baltimore City and County.

Fare levels emerged as a related factor. During the pandemic Bay Runner Shuttle has operated reduced service from the Eastern Shore to Baltimore/Thurgood Marshall Airport, providing an option for previous Greyhound riders unable to use suspended Greyhound service. However, both Bay Runner Shuttle and Shore Transit identified a need for the Greyhound service to return, primarily because of significant fare differences—there are riders unable to pay the higher fares of Bay Runner. A comment from western Maryland about limited demand because persons wanting/needing to travel do not have sufficient incomes may also be related. Bay Runner Shuttle operates the Section 5311(f) route to Grantsville, and it has higher fare levels on that route (contributing to a higher farebox recovery).

Program Strategy

Identifying Particular Routes/Service Levels in the Grant Solicitation

MDOT MTA has used CARES Act and other funds to maintain the intercity network during the period of the pandemic, not limiting funding to the two existing Section 5311(f) routes. The strategy going forward is dependent on the degree to which ridership recovers, but it may be that funding is needed to address the need for intercity connectivity between Baltimore and Salisbury. Currently the MDOT MTA Section 5311(f) application identifies priority corridors—there may be a need to more specifically define them to include Baltimore-Salisbury and other routes.

Identifying Stop Locations to Connect with Transit

A number of the stakeholders were unaware of intercity stop locations, and when they were identified they suggested that intercity stops be co-located with local/regional transit hubs. This has happened in some locations, such as Salisbury and Hagerstown, but not others, MDOT MTA may need to provide technical assistance or support to increase this connectivity.

Requiring Interlining

The consultation with the carriers also highlighted the fact that the intercity riders are going to and from distant places, and that intercity trips are generally not same-day trips. Interlining with the Greyhound/National Bus Traffic Association and Amtrak is important as it provides access to the national networks, allowing Maryland residents to travel anywhere in the country. MDOT MTA should continue to require these interline partnerships for funded services.

Connecting Commuter Bus

There may be options for improving connectivity by linking some MDOT MTA commuter routes with intercity services, particularly if the commuter routes serve the same terminal. This could involve including the commuter routes in the interline ticketing system and providing information through those networks, as well as letting commuter bus riders know that they can connect to intercity service.

Branding

Some other states have used separate branding to increase the visibility of their funded Section 5311(f) services, and the consultation process revealed that there is openness to that idea among Maryland carriers. At the same time, there are issues—in some states the focus on the branded services has meant the loss of interlining and connections to other states.

In the next chapter, this input will be considered in the development of a plan for the future development of the MDOT MTA Intercity Bus program.

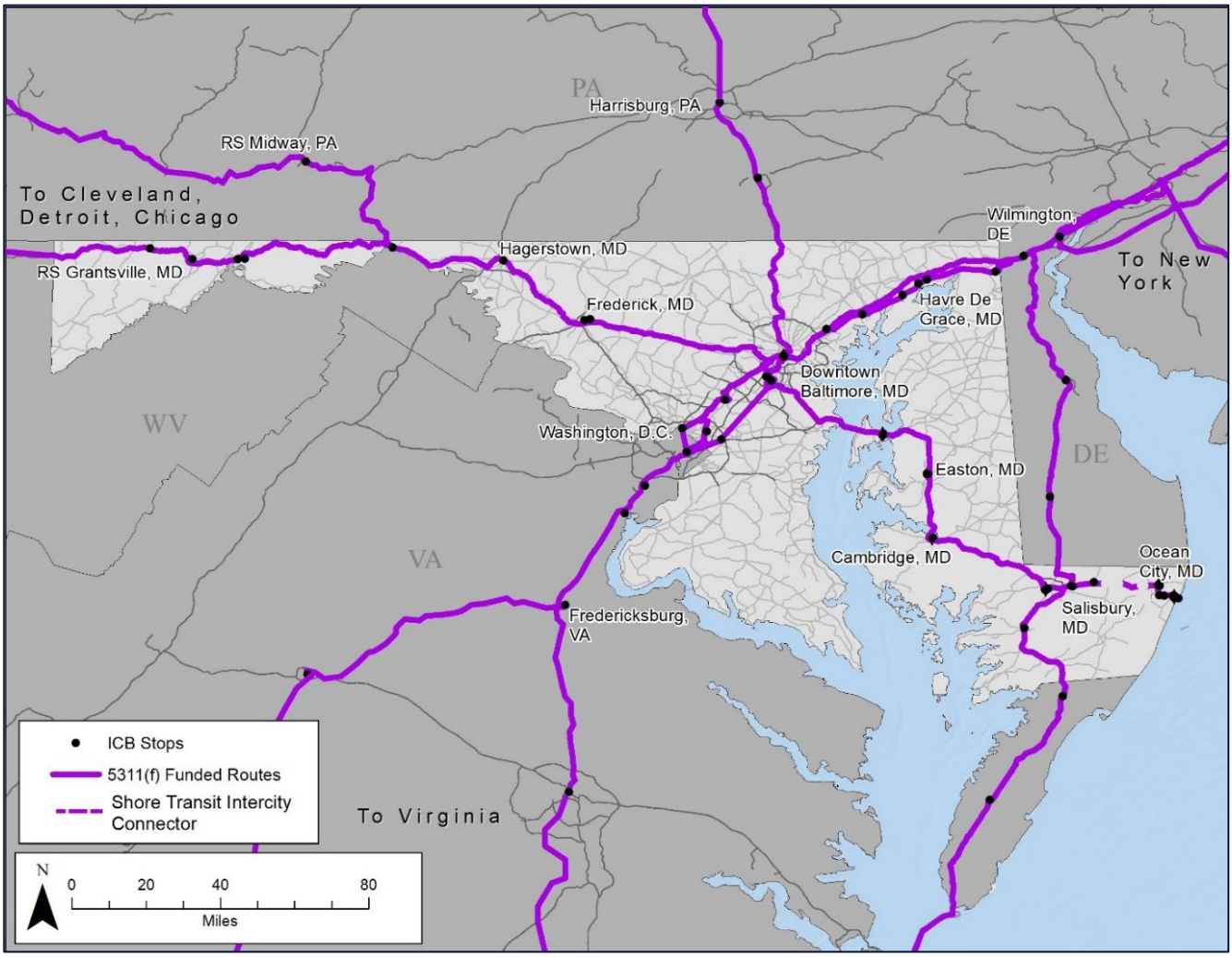
Maryland Intercity Bus Study
Chapter 6: Priorities Moving Forward

Previous chapters in this study have addressed Maryland's intercity bus network (including both the Section 5311(f) funded and unsubsidized routes), a demographic needs assessment, an evaluation of the performance of the current Section 5311(f) routes, and input from public meetings, and from stakeholders. In this chapter recommendations for the near-term direction of the program are made, along with a vision of an expanded future intercity bus program.

Maryland's Existing Intercity Bus Network

Chapter 3 described Maryland's intercity bus network as it exists, along with information about its extent prior to federal bus deregulation in 1983 and the network defined in the previous plan. Figure 6-1 presents a map of the current network.

Figure 6-1: Maryland's Intercity Bus Network



As can be seen in the map, there are a number of routes operated by different carriers:

- **Greyhound Lines** routes in Maryland include services from Baltimore and Washington to Salisbury; services to the west and north from Baltimore and Washington;, and frequent services on slightly different routes in the Washington-Baltimore region as part of a number of routes operating through the state on services beginning and ending outside the state.

- **BayRunner Shuttle** is a Maryland-based firm that describes itself as an airport shuttle that also offers intercity service between all of its stop locations. The firm operates services on two routes that connect in the Baltimore region, one from the west originating in Grantsville, and one from the east originating in Ocean City. BayRunner Shuttle connections are made at the Greyhound station in Baltimore, and at the BWI Thurgood Marshall Airport, both the main terminal and the Amtrak/MARC station.

- **Peter Pan** offers scheduled service from Washington, D.C. north to New York and Boston. Maryland stops include Silver Spring and Baltimore. In Silver Spring the Peter Pan stop is in the Silver Spring Transit Center, which is the bus terminal adjacent to the Metrorail station.

In addition, there are a number of "Curbside" carriers that have operated in Maryland in recent times, with services to and from a number of different points. For the most part they link Maryland population centers to New York City, other major cities in the northeast, and now with cities in the Carolinas The availability and amount of service offered by these firms has varied during the course of the COVID-19 pandemic. Table 6-1 presents a list of these firms and their current status.

Table 6-1: Curbside Carriers

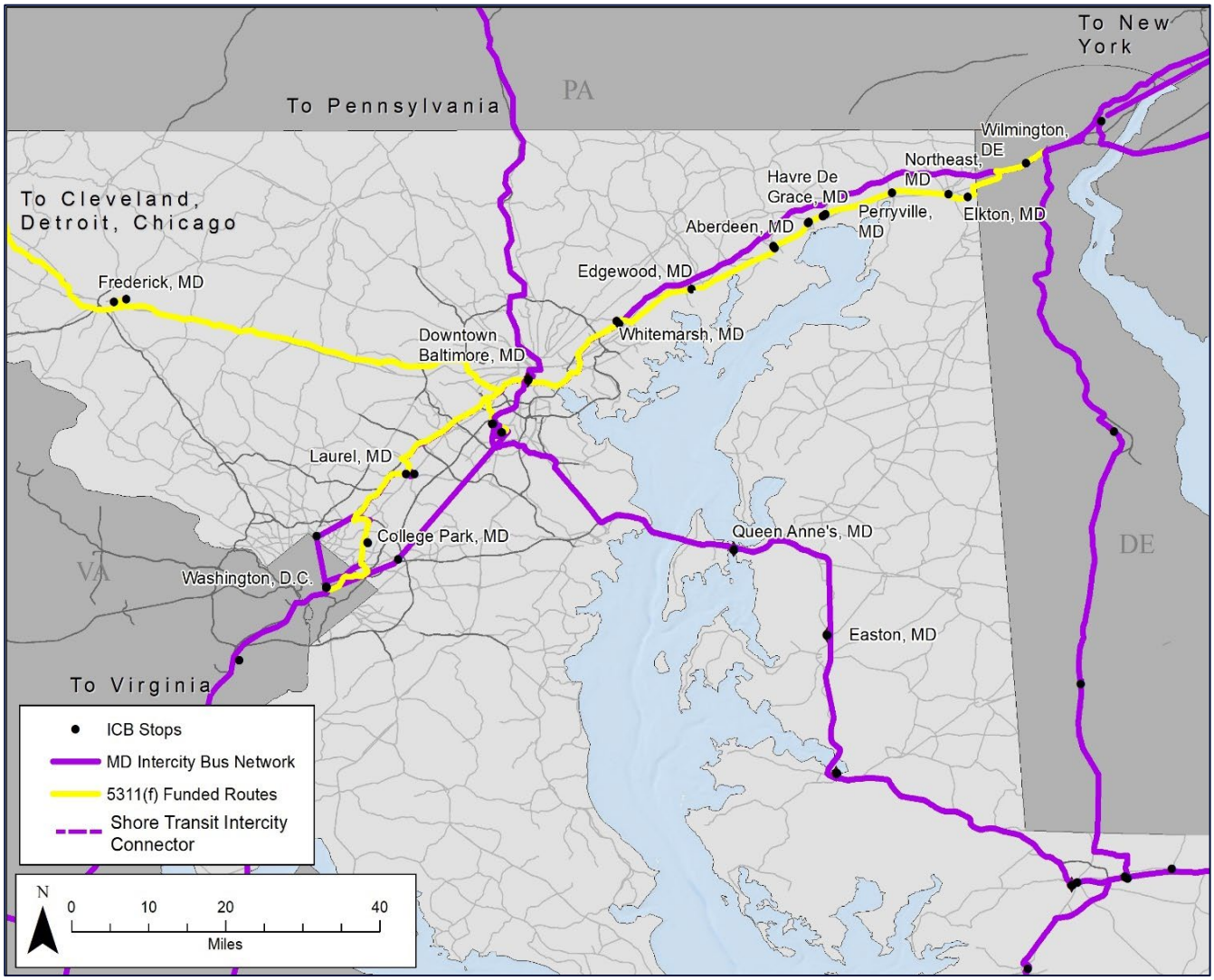
Bus Brand	Maryland Stops	Destinations from Maryland	Current Status
Boltbus	1578 Maryland Ave., Baltimore 21201; Greenbelt - Metrorail Station	Washington, D.C. New York, NY	All service currently suspended, passengers directed to Greyhound service-Website anticipates a return to service in the future.
Coach Run	5501 O'Donnell Street Cut-off, Baltimore (TA Gas Station); 801 North Point Blvd., Baltimore (Best Buffet Restaurant); 4931 Calvert Road, College Park (College Park Metrorail Station)	New York, NY Washington, DC Richmond, VA Raleigh, NC Durham, NC Greensboro, NC Charlotte, NC	Unclear - website functional but no trips available. COVID-19 status note says operating reduced schedules.
Flixbus	Baltimore	New York, NY Philadelphia, PA Boston, MA Richmond, VA	Currently only service to/from Baltimore
Megabus	White Marsh Mall (JC Penney) and White Marsh MTA Park and ride lot;	Philadelphia, Harrisburg, Pittsburgh, State College, PA New York, NY Washington, D.C.	Website functional, service reduced - Annapolis stop suspended
Vamoose (DC Trails, Inc.)	7401 Waverly St., Bethesda (Bethesda Metrorail Station)	New York, NY	Reduced schedules-four daily round trips (12-21)
Wanda Coach	Baltimore, maybe Hagerstown	New York, New York Cities in the Carolinas	Unclear what is operating, and what the services are.

Section 5311(f) Subsidized Routes/Services

This overall network includes routes and services that the private carriers have operated without any subsidy, and some routes and services that are funded by MDOT MTA under the FTA Section 5311(f) program. Prior to the COVID-19 pandemic, MDOT MTA provided funding for two routes.

BayRunner Shuttle operates between Baltimore and Grantsville, and Greyhound operates local service between the Maryland/Washington, D.C. line and the Delaware state line using U.S. Route 1 and Route 40. Greyhound provides the connections to Union Station in Washington, D.C. and Wilmington, Delaware. Figure 6-2 presents a map showing which segments of the network are funded by MDOT MTA.

Figure 6-2: Maryland's Section 5311(f) Routes



The western Maryland BayRunner Shuttle operates two round trips per day, and the Greyhound central Maryland makes one-roundtrip per day. They both stop at the Baltimore Greyhound Station on Haines Street, allowing a connection between them and with other Greyhound services. BayRunner Shuttle has interline ticketing with Greyhound (and Amtrak) and the schedules appear in the Greyhound website (and in Amtrak's reservation system).

FTA programs generally limit operating assistance to a maximum of 50 percent of the net operating deficit, but in the case of Section 5311(f) carriers are permitted to count the value of connecting unsubsidized service as the 50 percent non-federal share. In Maryland, Greyhound Lines provides this in-kind match for the BayRunner Shuttle service, and for its own route.

Maryland's Section 5311(f) 15 percent sub-allocation for FY 2021 is $964,738. MDOT MTA has not used any state funding for the non-federal share, with its two projects designed to utilize 100 percent federal funding (through careful definition of the extent of the project to utilize the in-kind match). As a result, Maryland's annual available formula funding for intercity bus is limited to that amount plus any special federal programs (such as the CARES Act).

Covid-19 Pandemic Impacts and Response

In March 2020 the stay-at-home orders and travel restrictions that came about as a result of the onset of the COVID-19 pandemic had an immediate and severe impact on intercity bus operators. Nationally, intercity bus ridership dropped to 15-20 percent of its normal level as only essential riders/trips took place. The resulting loss of revenue was a threat to survival for the private firms that provide intercity bus service—even those providing service with Section 5311(f) funding were threatened because of the lack of revenue on their unsubsidized services.

Federal relief funding in the form of the CARES Act included funding for public transportation. For rural public transportation, the FTA allocated the CARES funding on a formula basis to the states. The intercity bus 15 percent set-aside and the consultation requirement were included in the CARES Act guidance. MDOT MTA consulted with the carriers and elected to provide the CARES Act funding to the firms under existing Section 5311(f) operating agreements, BayRunner Shuttle and Greyhound. Northwestern Stage Lines and Salt Lake Express. The CARES Act funding did not require a match (even in-kind), and MDOT MTA did not limit it to the previously subsidized routes but allowed its use to support Maryland services generally.

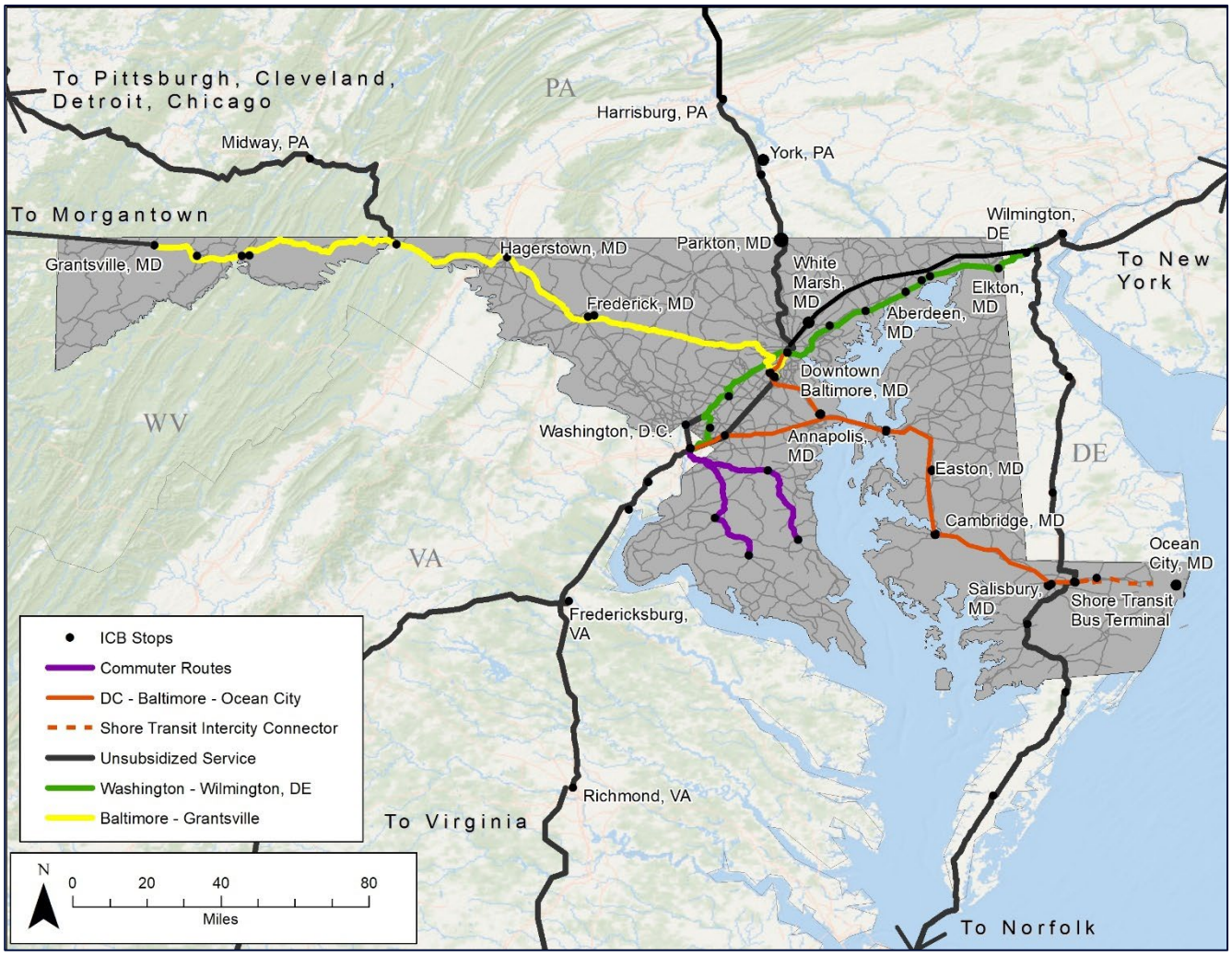
Near-Term Priorities: Regaining Pre-Covid Route Coverage

Given the current circumstances, the recommended policy going forward is consistent with the approach MDOT MTA has already taken—to use available resources to maintain the existing network. Within the existing network the priorities are (in order):

1. Grantsville-Frostburg-Cumberland-Hancock-Hagerstown-Frederick-Baltimore
2. Salisbury-Cambridge-Easton-Kent Island-Baltimore (with connections to/from Ocean City)
3. The Maryland portion of Washington, D.C- Wilmington, DE, including College Park, Laurel, Baltimore, White Marsh Edgewood, Aberdeen, Havre de Grace, Perryville, Northeast, and Elkton

Figure 6-3 presents a map of these corridors. Even for these few services, however, there are unknowns. One is whether there is a need to subsidize the previously unsubsidized Salisbury-Baltimore service, which is now operated by BayRunner Shuttle, with ticketing also available through the Greyhound website as an interlined service. The other is how much funding will be available.

Figure 6-3: Maryland Near-Term Priority Intercity Bus Corridors



The basic service requirements for these corridors include one daily (Monday through Sunday) roundtrip connecting with the national intercity bus network at a minimum, with two-daily round trips preferred.

Focusing on this existing network raises policy questions about funding for previously unsubsidized service, and about fare levels. The service between Baltimore and Salisbury was not previously subsidized prior to the pandemic, but Greyhound suspended service during the pandemic and has not reinstated service. Currently the BayRunner Shuttle schedules (four daily round trips connecting to the Baltimore Downtown Greyhound station) are shown in the Greyhound.com ticketing system at the same fares they are shown on BayRunner's own site. The fare levels (for a single person) are higher than pre-Covid, but this arrangement provides for much more convenient service than the single daily Greyhound schedule previously operated. It is possible that funding is needed to maintain this level of service following the pandemic, or that subsidy is needed to purchase accessible vehicles (to meet Greyhound interlining requirements). This unsubsidized service could need funding going forward, and so it is included here as a priority route for funding, but the need (if any) will not be known until applicants respond to the state solicitation.

Fare levels have not previously been addressed by MDOT MTA but were raised as an issue by stakeholders. The current Section 5311(f) fare from Baltimore to Grantsville on BayRunner Shuttle is approximately $0.46 per mile for one person, lower for groups of two or three. The Salisbury-Baltimore fare on BayRunner for one person is $0.64 per mile, also lower for groups of two or three. The current Greyhound fare (for a non-peak weekday) between College Park and Elkton on the Section 5311(f) route is approximately $0.38 per mile. Without knowing the costs or revenues for the BayRunner Shuttle Eastern Shore service, it is not possible to predict if they will apply for funding, which could result in lower fares. It is recommended that MDOT MTA request information on proposed fares as part of the application.

The recently passed Bipartisan Infrastructure Law includes increased funding for Section 5311 rural formula grants, which may reduce the need to make choices between services—both the subsidy need and the available funding levels are unknown at this time.

Table 6-2 presents estimates of the potential funding that might be required for the two existing Section 5311(f) routes.

Table 6-2: Estimates of Potential Section 5311(f) Annual Funding Requirements for Priority Routes

Route:	One-Way Miles	Daily Frequency	Days of Operation	Total Annual Miles	Operating Cost Per Mile	Total Operating Cost	Estimated Revenue	Net Operating Deficit
Grantsville-Baltimore	158.5	4	365	221,000	$3.14	$693,940	$191,323	$502,617
MD portion of D.C. to Wilmington, US 1/US 40				69,476*	$4.89	$339,738	$26,287	$313,451
Baltimore (Greyhound) to Salisbury	119.2	2	365	87,016	$5.00	$435,080	$217,540	$217,540
				231,410				$1,319,020
FY 2021 Maryland Section 5311(f) 15% Allocation								$964,738
Shortfall/Overage								$354,282
Estimated FY 2022 Maryland Section 5311(f) Allocation								$1,254,159.47
Shortfall/Overage								$64,861

*Actual Maryland miles CY 2019.

These are speculative estimates, based on FY 2019 data and some assumptions. These include:

- Cost per mile figures remain essentially the same—they could well increase for a variety of reasons, including higher capital/depreciation costs for accessible vehicles (for BayRunner), increased fuel costs, increased labor costs (to retain/attract drivers), and COVID impacts on overhead costs (fewer miles to spread costs results in higher costs per mile).

- Revenues are completely dependent on recovery from COVID. In this table the western Maryland revenues assume full recovery of the revenue BayRunner was receiving in 2019, as does the Greyhound revenue figure for the central Maryland route. The revenue Greyhound was receiving for the eastern shore service in FY 2019 is unknown, because the route was unsubsidized.

- There is available in-kind match from unsubsidized services to allow 100 percent federal funding of the deficits on these routes. MDOT MTA has not provided any state funding for the 50 percent local match required by FTA for operating projects, but the carriers have been able to use the FTA in-kind match program to meet this requirement. However, following the pandemic, if travel patterns do not return to previous conditions there could be issues with this reliance on in-kind match to maintain these routes.

The determination of the actual plan will need to await the costs provided by the grant applicants for the three routes, the amount of any carryover Section 5311(f), and the federal FY 2022 apportionments and allocation tables. The potential cost and the potentially available funding are sufficiently close that MDOT MTA should show these routes as priorities in the FY 2022-23 grant application to have the information necessary to make decisions on what to fund when federal funding is known.

Other Near-Term Initiatives

The stakeholder input received for this study suggests two other near-term actions that could improve mobility at a minimal cost. One addresses information about the intercity services, and the other about coverage and connectivity from MDOT MTA's Commuter Bus program.

Information

Stakeholders were generally unaware of the intercity services available in the state, particularly those outside of the I-95 corridor, and particularly those funded by MDOT MTA. MDOT MTA has never provided public information about these services on its website or through any of its information platforms, despite the fact that they are run under grant contracts that are similar to those of the commuter bus program. Timetables and web information for those routes show routes, stops, schedules and fares—but also list the name of the private contractor providing the service. Recently, however, MDOT MTA issued new maps of statewide transit services that show intercity bus stops, at least for central Maryland. Adding Maryland's rural intercity routes to the web information in the same manner as the commuter bus routes would cost little, and if promoted could let people become aware that MDOT MTA is connecting the entire state. The information could direct users to the carrier websites for tickets and information about connecting intercity services.

Related to that initiative is a requirement that MDOT MTA grant recipients provide GTFS data showing routes, stops and schedules—and make it available to Google Transit. MDOT MTA relies on Google Transit as the platform for its web Trip Planner, and if the intercity carriers provided data it would allow users to plan trips that included the intercity elements as well—for example, showing how to connect from a home address in Columbia to an intercity connection to New York. The Google Transit platform is nationwide.

Interlining with Existing Commuter Bus Routes

The coverage data combined with stakeholder input suggest that there is a need to provide for some type of intercity connectivity for southern Maryland. There is extensive MDOT MTA commuter bus coverage in this region, and a potential low-cost way to provide for intercity connectivity would be for either MDOT MTA (as the oversight contractor) or the contracted carriers providing service on the commuter bus routes connecting to Union Station in Washington to become interline carriers. Under Greyhound's interline ticketing the commuter bus operators could receive their full fare for passengers they bring to Greyhound who are making connections in Washington.

Two MDOT MTA Commuter routes terminate on the street at Union Station:

- MDOT MTA Route 735 operates from Charlotte Hall (via Waldorf) to stops in front of and alongside Union Station in Washington, D.C. with five inbound a.m. trips, and six outbound p.m. trips.

- MDOT MTA Route 850 operates from Prince Frederick/Dunkirk to the same stops in front of and alongside Union Station in Washington, D.C. with three inbound a.m. trips, and three outbound p.m. trips.

With interline ticketing for these routes, potentially Charlotte Hall or Prince Frederick would begin appearing in Greyhound's ticketing system as potential origins/destinations, with schedule information showing how to connect to/from these locations as part of a longer intercity trip. A rider in southern Maryland seeking a trip, say, to New York could go to the Greyhound site and buy a ticket from Prince Frederick to New York, using it to ride the MDOT MTA Commuter 850 to Union Station, where they could board a New York-bound bus on the same ticket. Knowledgeable transit riders likely already do this, but making these routes interline would add routes to Maryland's intercity network. Setting this up would likely require some staff work but could provide for more coverage—and perhaps even a few more riders.

Other Considerations

ADA Accessibility

FTA requires that all Section 5311(f) services be operated with fully accessible vehicles meeting the requirements of Title 49, Part 38. As a condition of providing in-kind match miles, and as a requirement for its interline partners, Greyhound Lines requires its partners to provide fully accessible service meeting

the FTA requirements. MDOT MTA should reinforce this requirement in the application, requiring funded service to be operated with accessible vehicles from its initiation.

Branding

While some states have required Section 5311(f) grant recipients or contractors to operate services under a state brand, to this point Maryland has not. Branding in this sense would require the vehicles used on the service to be wrapped, and for there to be a dedicated web site reflecting the services provided under that brand. It could also require signage at stops. Models elsewhere include the Travel Washington routes in the state of Washington, GoBus in Ohio, Bustang in Colorado, and Virginia Breeze in nearby Virginia—each of which has a slightly different way of applying the branding and supporting the brand.

Branding Maryland's Section 5311(f) routes might well do a lot to increase the visibility of the service, encouraging ridership and public support. However, to achieve these benefits the wrapped buses must be essentially dedicated to those routes, with very limited use as part of a larger carrier's pool of buses. In some cases this could increase carrier costs, or have negative effects on ridership by limiting the use of such buses on longer routes. For example, Greyhound now operates the Washington to Wilmington route as part of a service that continues to New York. Requiring branded buses would limit the ability of a carrier to operate such services. During the recovery from COVID over next two years the MDOT MTA focus on regaining/retaining coverage should allow the applicants to include proposals for branding MDOT MTA services, but not require it. The additional funding for marketing and a state-branding website may also be a concern.

Vision Plan

The discussion above, the input documented in the previous chapters and elements of the MDOT MTA *Statewide Transit Plan* all suggest that there is a need for more and better intercity bus service than that outlined in the near-term plan. It builds on the elements described above, with limited additions of route coverage, and some additional frequencies—in effect minimum service standards. This plan includes the following elements:

- **Western Maryland:**
  - Grantsville-Baltimore: as in the near-term plan, two round-trips per day but with additional demand addressed by larger vehicles.
  - Frederick-Washington, DC: This is a new connector, suggested by some to connect to Metrorail at Shady Grove—but to maximize intercity connectivity it should serve Union Station in Washington, D.C.. Schedules would be set to provide for connections to and from the Grantsville-Baltimore bus in Frederick to provide for access from western Maryland. All-day MARC service could meet this need, but currently the last MARC trains leave Frederick before the Grantsville buses reach Frederick, and arrive in Frederick after the Grantsville buses leave. Additional bus service would be less expensive than additional rail frequencies.

- **Eastern Shore:**
  - Baltimore-Salisbury (Ocean City) is also included in the near-term priority list, would have a minimum of two daily round-trips scheduled to provide morning and evening access to/from the Eastern Shore—with additional frequencies possible to address demand. In this Vision plan, the service operates to/from Ocean City in the summer peak season.
  - Annapolis—Washington, D.C: This also is a new connection, with the schedules set to provide connections both ways with the Baltimore-Salisbury service.[1]

- **Northern/Central Maryland:**
  - Maryland portion of Washington, D.C. to Wilmington, DE local service operated on U.S. 40 and U.S. 1. This service is currently operated by Greyhound as a Section 5311(f) service with a single daily round-trip—in the Vision Plan there would a second daily trip operated southbound in the morning and northbound in the afternoon, opposite of the existing schedule. BWI Marshall Airport would be included as a stop.
  - Baltimore-Parkton-York: This connection has been operated by Greyhound and Megabus as part of service to Harrisburg, and there has been commuter service provided from York to the Light Rail stop operated by Rabbit Transit. This Vision Plan reflects a desire that in addition to the commuter service, this route would see a minimum of three daily round-trips. A scheduled stop at the Parkton Park and Ride is included to provide access from northern Baltimore County. For connectivity this service should terminate in Baltimore at the intercity bus station. This route may or may not require Section 5311(f) funding.

- **Southern Maryland:**
  - Interlined MDOT MTA Commuter Bus service on the 750 and 815 routes, connecting to the national intercity bus network at Union Station in Washington, D.C. In this Vision plan these buses directly access the bus deck at Union Station, which would be their terminus.

Figure 6-4 presents a map of this network. While this vision of expanded service is not a large incremental improvement over the near-term, it does call for more frequency, and it would require funding beyond the 15% Section 5311(f) allocation set-aside of Maryland's overall Section 5311/5340 funding. Ultimately, the frequency on any of these corridors is a function of the demand, and the minimum required performance levels could be used as a basis for determining how much service to provide.

[1] Historically, Carolina Trailways operated services from Baltimore and Washington to the Eastern Shore using two buses on each schedule, the bus originating in Baltimore would go to Ocean City and the bus from Washington would go to Rehobeth Beach, Delaware. The two buses would meet in Grasonville and exchange passengers as needed. If Delaware had interest this could potentially be recreated to provide greater access though not limited to Maryland.

Figure 6-4: Maryland Intercity Bus Vision Plan Map

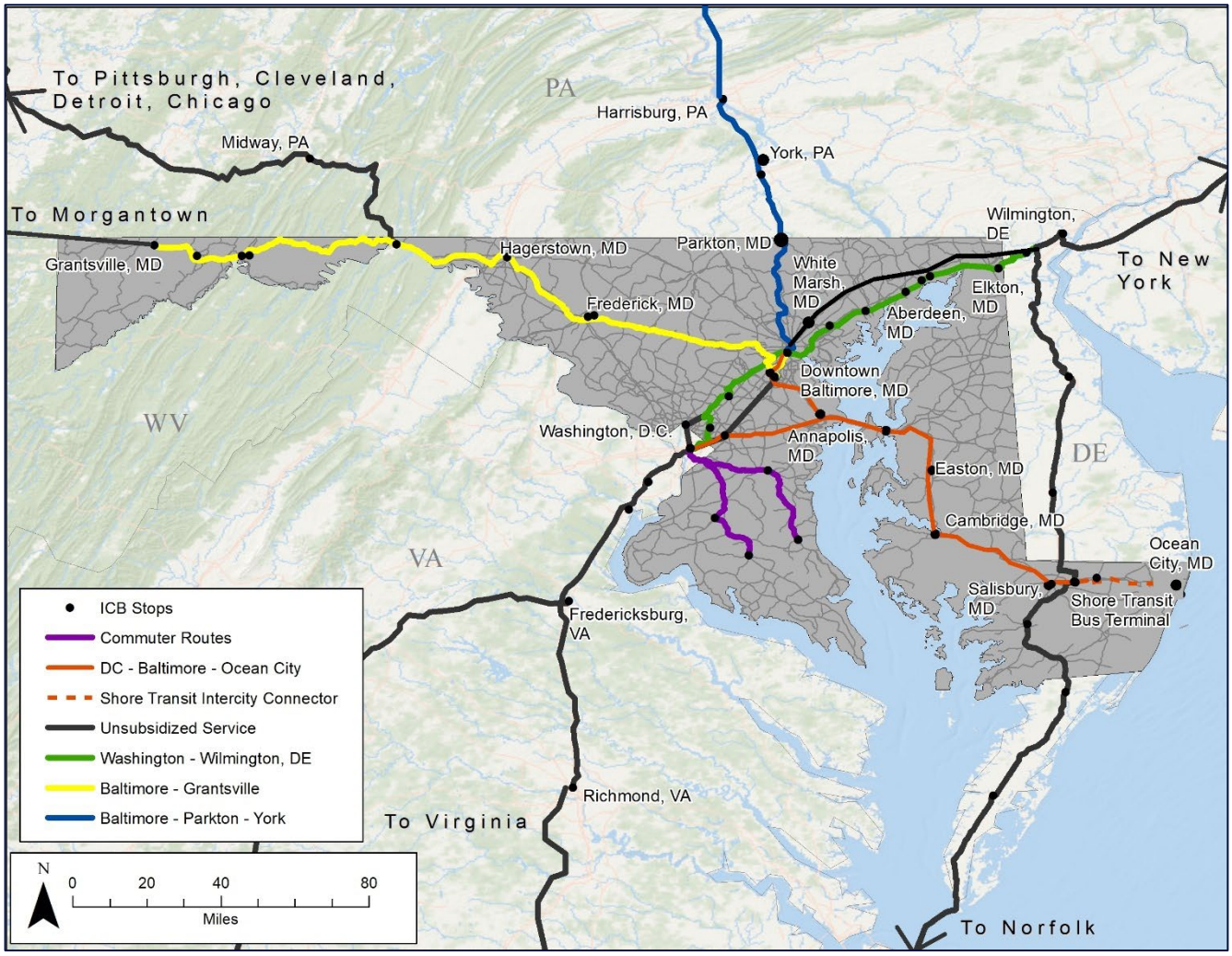


Table 6-3 presents a very speculative estimate of the operating costs of this higher level of service, along with a comparison to the available Section 5311(f) funding. With the actual demand in the era following pandemic recovery is unknown the estimates of minimum fare revenue are based on MDOT MTA policy for desirable overall minimum performance. Some of these routes were run without subsidy prior to the COVID pandemic, and others had varying levels of subsidy depending on both demand and fare levels. The estimates in this table are intended to provide a basic estimate—it would likely require an additional $3 to $3.5 million per year in operating funding to provide this statewide network at the desired frequencies, over and above FTA Section 5311(f) allocations.

Table 6-3: Estimated Operating Costs of Intercity Bus Vision Plan

Route:	One-Way Miles	Daily Frequency	Days of Operation	Total Annual Miles	Operating Cost Per Mile	Total Operating Cost	Estimated Revenue*	Net Operating Deficit
Grantsville-Baltimore	158.5	4	365	231,410	$5.00	$1,157,050	$231,410	$925,640
Washington, DC to Frederick	53.6	4	365	78,256	$5.00	$391,280	$78,256	$313,024
Washington, DC to Wilmington, US 1/US 40 (MD Mi.)	90	4	365	131,400	$5.00	$657,000	$131,400	$525,600
Baltimore (Greyhound Sta.) to Salisbury (Shore Transit)	119.2	8	365	348,064	$5.00	$1,740,320	$348,064	$1,392,256
Washington, DC to Annapolis	27.9	8	365	81,468	$5.00	$407,340	$81,468	$325,872
Baltimore to Harrisburg, PA (MD miles)	42.6	6	365	93,294	$5.00	$466,470	$93,294	$373,176
				1,137,924	$5.00	$5,689,620	$1,137,924	$4,551,696
FY 2021 Maryland Section 5311(f) 15% Allocation								$964,738
Shortfall/Overage								$3,586,958
Estimated FY 2022 Maryland Section 5311(f) Allocation								$1,254,159.47
Shortfall/Overage								$3,297,537

*Assumed at 20% farebox recovery minimum performance.

Implications for the FY 2023-2024 Application

The implications for changes to the MDOT-MTA Application for the next biennium are straightforward:

- In addition to the two currently funded corridors, add the Baltimore-Salisbury-Ocean City corridor as a priority, recognizing that there is existing service that could require some level of funding to retain frequency while meeting ADA requirements.

- Include additional language strengthening the requirement that all Section 5311(f) funded services be operated with vehicles that are fully ADA accessible. Note that funding could be used to purchase accessible vehicles to be used on Section 5311(f) services, or that if carrier purchase of accessible vehicles created an operating deficit Section 5311(f) could be used to fund that deficit.

- Include a request that proposers include a table showing existing or anticipated fares between planned stops and the endpoints or connection point.

- Require that funded services have interline ticketing with the national intercity bus network.

- Require funded carriers to provide GTFS data to MDOT MTA as necessary, and also make it available to Google Transit to enable MDOT MTA trip planning to show connecting intercity trips.

- Allow applicants to present ideas for MDOT MTA branding or other creative marketing approaches to increase public awareness of the service.

Beyond changes to the application, other initiatives that are recommended for MDOT MTA implementation include provision of information about the funded services on the MDOT MTA website, with links to websites of connecting unfunded intercity carriers, and technical assistance to operators and public transit providers to create shared stop locations that include signage about available services.

Appendix A
Project Background Attachment for Surveys

MARYLAND DEPARTMENT OF TRANSPORTATION
MARYLAND TRANSIT ADMINISTRATION

Maryland's Intercity Bus Program:

The Office of Local Transit Support (OLTS) At MDOT-MTA manages Maryland's rural intercity bus program, utilizing state's apportionment under the FTA Section 5311(f) program.

Maryland Intercity Bus Study

Under the Section 5311(f) program, FTA requires that states periodically conduct a consultation process to determine if there are unmet intercity bus needs, and MDOT-MTA is also interested in examining if there are desirable improvements to the current program. This study is designed to address these needs and your input is needed as part of this study. Please assist by completing the survey questions in the link below:

https://www.surveymonkey.com/r/MDIntercityNeedsSurveyForRegionalPlanningAgencies

What is 5311(f)?

5311(f) is a subsection of the overall FTA Section 5311 program of assistance for public transportation serving rural (non-urbanized) areas. Each state must spend no less than 15 percent of its annual apportionment for the development and support of intercity bus transportation, unless it can certify, after consultation with intercity bus service providers, that the intercity bus needs of the state are being adequately met. A unique provision of this program is the ability to use the value of connecting unsubsidized intercity bus service as the local match for operating project.

What Does Intercity Mean?

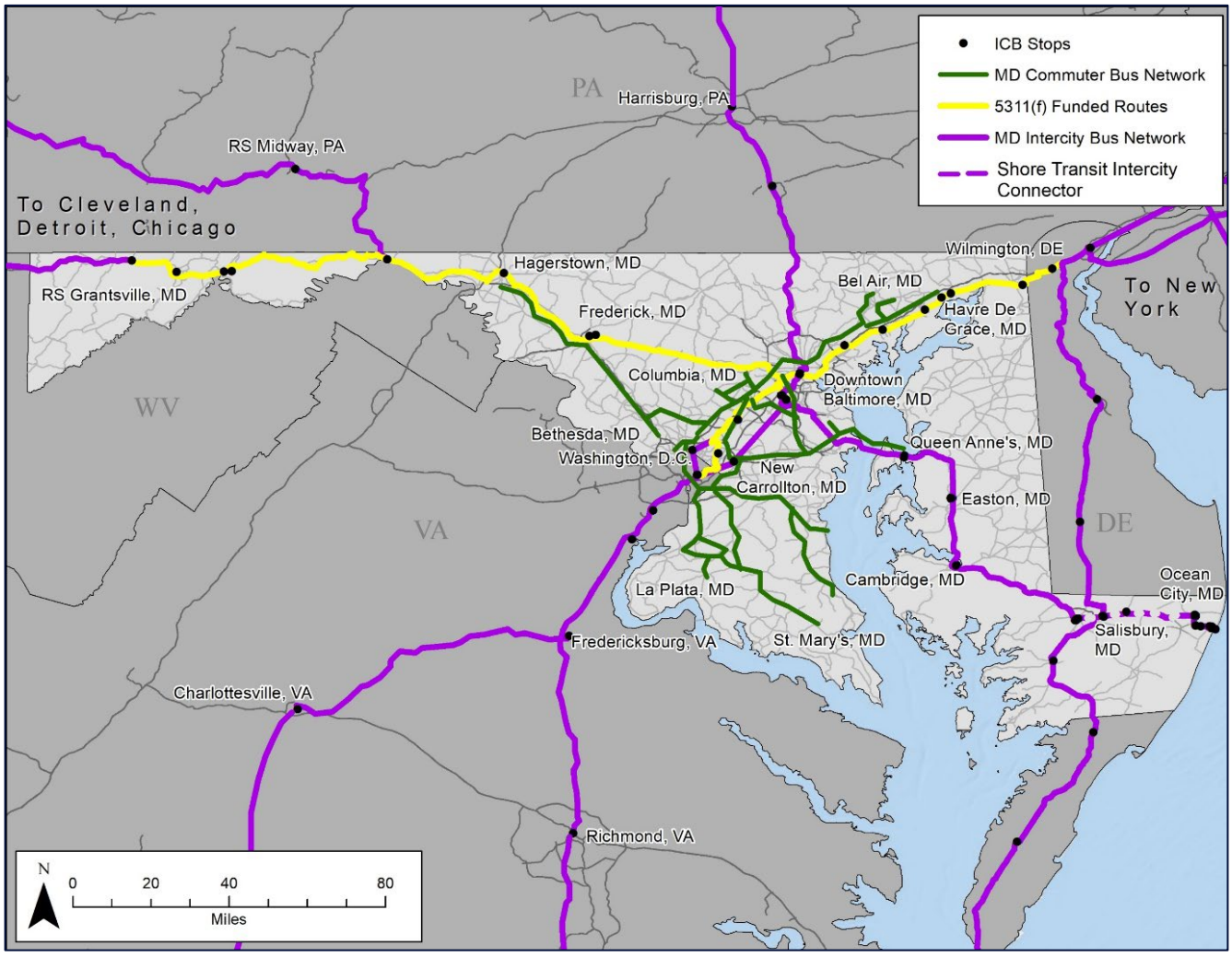
Intercity bus service carries passengers over long-distances between different cities, towns, and other populated areas. FTA defines eligible intercity bus services to have the following characteristics:

- A meaningful connection to the national intercity bus network
  - Shared stations
  - Coordinated schedules
  - Interline ticketing (if appropriate)
- Fixed-route, fixed-schedule
- Space for baggage
- ADA-accessible

Section 5311(f) in Maryland

Maryland's FY 2020 15% Section 5311(f) allocation is $962,725. Under the Maryland program, these funds are used to cover the operating deficit on these routes, with in-kind match provided by Greyhound Lines. Some has been used for marketing and capital projects.

Within Maryland, BayRunner operates a subsidized route from Baltimore to Grantsville and Greyhound operates a subsidized route from D.C. to Wilmington, DE. Greyhound operates four other unsubsidized routes throughout Maryland; D.C.-Baltimore to northeast corridor destinations, Baltimore-Salisbury, Baltimore and D.C. westbound via Frederick, and New York-Norfolk-Salisbury. BayRunner operates an unsubsidized route from BWI to Ocean City.



73.3% of Maryland's population lives within 10 miles of a current intercity bus stop and 96.8% lives within 25 miles of a current intercity bus stop.

If You Have Questions:

- Contact at MDOT-MTA Office of Local Transit Support:

  Jeannie Fazio: Jfazio1@mdot.maryland.gov

  Or

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- Contact at the KFH Group:

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  Or

  Joel Eisenfeld: jeisenfeld@kfhgroup.com

Thanks!

Appendix B

MD ICB Advisory Committee – Invited Members

MD ICB Advisory Committee – Invited Members

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Appendix C
Survey Letter to Private Operators for Consultation Meeting

MARYLAND DEPARTMENT OF TRANSPORTATION
MARYLAND TRANSIT ADMINISTRATION

Larry Hogan
Governor
Boyd K. Rutherford
Lt. Governor
Gregory Slater
Secretary
Kevin B. Quinn, Jr.
Administrator

March 24, 2021

Mr./Ms.

Dear :

The Maryland Department of Transportation Maryland Transit Administration (MDOT MTA), Office of Local Transit Support (OLTS), is requesting your input on needs and funding for rural intercity bus service needs in Maryland.

By April 9, 2021, we ask that you please participate in an interview by conference call addressing this program.

MDOT MTA is the recipient of Federal Transit Administration (FTA) funding for rural intercity bus service under Title 49 U.S.C. Section 5311(f). MDOT MTA wishes to determine the need for state/federal assistance to maintain current services or provide expanded connections from rural areas to connect with the national intercity bus network. For this purpose, MDOT MTA has contracted with KFH Group to prepare an Intercity Bus Study.

Your input and the analysis in the draft needs assessment will be used by MDOT MTA as it considers changes in the Section 5311(f) program over the next several years. A vital component of this assessment is consultation with existing and potential operators of rural intercity bus services regarding unmet rural intercity service needs, and your assistance in this regard would be greatly appreciated. MDOT MTA awards Section 5311(f)-funded grants through its biennial project application process, which will take place this fall for FY 22-23 funding.

Based on FTA Circular 9040.1G, intercity bus service is defined as "…regularly scheduled bus service for the general public that operates with limited stops over fixed routes connecting two or more urban areas not in close proximity, that has the capacity for transporting baggage carried by passengers, and that makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available." Commuter bus service is not included in this definition.

MDOT MTA is interested in your perspective on how best to maintain or expand rural intercity bus services or improve coordination with local public transportation. Aspects of intercity service needs in Maryland that you can assist us in understanding include:

1. Existing scheduled intercity bus services operated by your firm, and the degree to which they currently connect or interline with the national intercity bus network or with local public transit services. Attached is a draft technical memorandum documenting our current understanding of the existing intercity network—please review it to and let us know if there are additional services, or if we have included any services that have changed. If any of the current services you operate are vulnerable to being discontinued, please identify those services.

2. Routes or corridors that you perceive as having an unmet need for service, whether there is a complete absence of service, or if existing services do not meet the needs. These needs could include a need for new routes, for additional stops, or for additional schedules.

3. Other aspects of intercity services in Maryland that need to be addressed. This could include facilities, wheelchair accessibility, marketing and information (such as providing GTFS/Google Transit data), connectivity with local transit, schedule connections, amenities, etc.

4. Input to Maryland's Section 5311(f) Intercity Bus (ICB) grant program, such as needed program information or guidance, the application process, etc.

We would like to obtain your input as soon as possible and no later April 9, 2021. We would like to schedule a conference call with you to discuss the questions above and on the attached survey, or if you prefer you can respond via e-mail, providing your comments on the attached response form and returning by mail or e-mail. Please use the attached Doodle Poll request to provide times that would work for you for this conference. Please reference the survey form for detailed contact information. You may also be receiving this letter and survey through the mail. Please let us know the best contact to schedule this teleconference and who from your firm should be involved.

As mentioned above, MDOT MTA has engaged the KFH Group, Inc. to compile the results of this survey and assist in the development of the MDOT MTA ICB grant program. If you have any questions about the survey or study, please contact Joel Eisenfeld at jeisenfeld@kfhgroup.com or Fred Fravel, the study's Project Manager, at the KFH Group, at 301-951-8660 or ffravel@kfhgroup.com. You may also contact Jeannie Fazio at JFazio1@mdot.maryland.gov or Bruce Hojnacki at BHojnacki@mdot.maryland.gov if you have questions about the study or the program.

We look forward to hearing from you soon.

Thank you,

Travis Johnston, Director
Office of Local Transit Support