



Lower Mystic TMA

ANNUAL REPORT

2023

Prepared by



NORTHEAST
CONSULTING GROUP



OVERVIEW

During its second year of operation, the Lower Mystic Transportation Management Association (TMA) continued to develop programs and services for members. Highlights of these efforts include a new carshare program in Everett, a successful Water Transportation Month, as well as implementing a major study to support the revamping and rebranding of the existing Everett Neighborhood Shuttle. The study also establishes a roadmap for a network of connected shuttles to expand access to housing, work, shopping, and entertainment venues in Lower Mystic communities of Everett, Charlestown, and Chelsea.

An area of key importance this year was the work by the executive team to refine the process of collecting and monitoring existing and new development permits to support compliance with the City of Everett's transportation demand management (TDM) Ordinance requirements and City of Boston's development permit transportation requirements. This project provided insight for how staff can best develop programs and services that meet the needs of members to help them achieve and maintain compliance. As this project progressed, we identified a need for a more robust, customized, shared online software system that will be implemented in 2024 to track this information.

Meetings with developers who have projects located in the TMA service area continued throughout 2023. For new projects, these meetings allow an opportunity for staff to educate potential members about the TMA, learn about development permit commitments, and track construction and anticipated project occupancy. For our current and new members, as their projects come online, we use these meetings to learn more about their communications channels and TDM goals and to develop customized services and promotional events to effectively promote TMA programs to residents and employees.

This year, staff participated in a variety of advocacy efforts to support the mission of the TMA and its members – including working towards the delivery of Bond Bill funds for FY25 and coordinating with state agencies and other greater Boston TMAs to develop travel options for member residents and employees during the 2023 Sumner Tunnel shutdown. Finally, in 2023, the TMA received its designation as an IRS-recognized 501c4 organization, and the TMA Board of Directors was pleased to welcome a representative from the City of Boston to the Board.

Still in its formative years, the Lower Mystic TMA's second year of operation continues to solidify its presence as a TDM resource in the Lower Mystic area, stabilize its budget, and boldly plan for new programmatic endeavors to support its mission. Below we have provided highlights of staff activities and a summary of the Lower Mystic TMA 2023 finances. It's been another jam-packed year for the Lower Mystic TMA. Thank you for sharing the ride with us!

PEOPLE

STAFF



Andrea Leary | Principal and Co-Founder

Allison Simmons | Principal and Co-Founder

Olivia Saccocia | Program and Marketing Coordinator

BOARD

Matt Grogan
Board Clerk



Chris Legocki
Board President



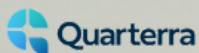
John Tocco
Board Treasurer



Rob Burns



Dan Lee



Jim Fitzgerald



Jon Block



Jay Monty



BUDGET

The Lower Mystic TMA began the fiscal year with a cash balance of \$59,551. The TMA received accounts receivable payments of 27,050. The TMA received \$125,060 in funding during 2023 from the Massachusetts Gaming Commission Grant for TMA administration and the shuttle study and \$119,436 in membership dues. Total TMA Assets for 2023 were \$331,097. Total expenses in 2023 were \$241,133 which included \$44,522 in accounts payable. The TMA ended the fiscal year with a cash balance of \$134,486.

The 2023 financial account information is complete and will be sent to the TMA bookkeeper to review and format the documents for submission to the TMA's accounting firm (George Kaplan, PC) for preparation of the FY2023 tax returns. The completed tax return and Annual Report will be filed with the IRS and the Secretary of State's office respectively. The 2023 Statement of Income and Expense and Balance Sheet is included in this report.



FINANCIAL STATEMENT

2023 LOWER MYSTIC TMA STATEMENT OF INCOME & EXPENSES 12/31/23

2023 INCOME

MEMBER DUES	
2023 Dues Received	\$119,435.55
Total Dues	\$119,435.55
GAMING COMM GRANT REIMB (TMA MGT & EXP)	
2023 Gaming Commission Grant Reimb (1/2023 - 3/2023)	\$25,765.49
2023 Gaming Commission Grant Reimb (4/2023 - 6/2023)	\$29,560.43
Grant Income (TMA Mgt & Exp)	\$55,325.92
GAMING COMMISSION GRANT REIMB	
Reimbursement Q1 Shuttle Planning	\$35,432.84
Reimbursement Q2 & Q3 Shuttle Planning	34,300.75
Total Grant Income (shuttle planning)	\$69,733.59
2022 ACCOUNTS RECEIVABLE	
Q4 NorthEase Consulting & Exp	\$27,050.48
Total 2022 Accounts Receivable	\$27,050.48
FREE CASH	
2022 Retained funds	\$59,550.99
Total Free Cash	\$59,550.99
TOTAL INCOME RECEIVED TO DATE	\$331,096.53

2023 ACCOUNTS RECEIVABLE	
2023 Dues Outstanding Dues	\$0.00
Q2 Gaming Commission Reimb (TMA Mgt & Exp)	\$40,397.51
Q2 Gaming Commission Reimb (Shuttle Planning)	\$30,262.97
Total 2023 Accounts Receivable	\$70,660.48
TOTAL ASSETS	\$401,757.01

2023 EXPENSES

2023 TMA MANAGEMENT & EXPENSES	
2023 TMA MANAGEMENT & EXPENSES	\$89,064.16
Total 2023 TMA MGT & EXP	\$89,064.16
SHUTTLE STUDY EXPENSES	
2023 Shuttle Study Expenses	\$79,996.56
Total 2023 Shuttle Study	\$79,996.56
2022 Accounts Payable	
2022 Accounts Payable - NorthEase (Q4)	\$27,549.80
Total 2022 Accounts Payable	\$27,549.80
TOTAL EXPENSES PD TO DATE	\$196,610.52
2023 Accounts Payable	
NorthEase - TMA Mgt & Exp	\$24,522.40
Shuttle Planning	\$20,000.00
Subtotal 2023 Accounts Payable	\$44,522.40
TOTAL EXPENSES	\$241,132.92
NET ASSETS	\$160,624.09
CASH ON HAND - CKBK	\$134,486.01

LOWER MYSTIC TMA BALANCE SHEET

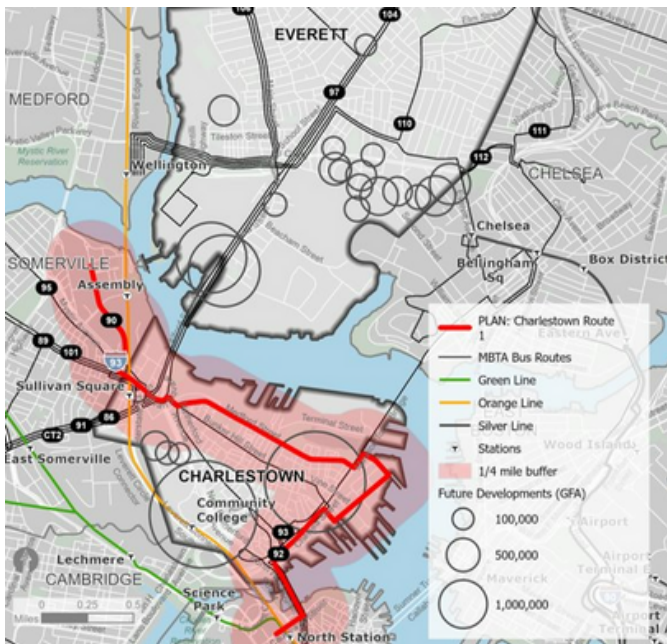
JANUARY 1, 2023 - December 31, 2023

ASSETS		LIABILITIES	
2023 Dues	\$119,435.55	2023 TMA Mgt Expenses	\$89,064.16
Grant Reimbursement - MGT/EXP	\$55,325.92	2023 Accounts Payable (TMA Mgt & Shuttle)	\$44,522.40
2023 Accounts Receivable (Dues/Grant)	\$70,660.48	2022 Accounts Payable	\$27,549.80
2022 Accounts Receivable	\$27,050.48	2023 Shuttle Study	\$79,996.56
Grant Reimbursement - SHUTTLE	\$69,733.59	2023 Net Assets	\$160,624.09
Retained Income	\$59,550.99		
Total Assets	\$401,757.01	Total Liabilities	\$401,757.01

SHUTTLE STUDY

Overview

The Lower Mystic TMA conducted a yearlong study to address the burgeoning transportation needs of the Lower Mystic region, specifically focusing on the needs of Charlestown and Everett. The TMA, using funds from the MA Gaming Commission and working alongside the Board of Directors, examined the transit connections needed to support the future growth of commercial and residential development in the area. The goal of the study was to produce a road map of shuttle routes that can be operated by the TMA and funded jointly by developers in the region. These types of shuttle services are a powerful tool in the pursuit of efficient, sustainable, and accessible transportation solutions.



Assembly to North Station via Medford St

Key Achievements

I. Strategic Planning: A comprehensive assessment of existing transit infrastructure, future development sites, and the economic and mobility needs of the area were conducted.

Notable deliverables include:

- Inventory of employment/development sites and permitted shuttle requirements
- Development of evaluation matrix to weigh service delivery, routing and cost
- Development of criteria for joint TMA shuttle service, including hours of service, public access, and branding
- Assessment of existing private shuttles and ridership
- Mapping of development data to evaluate transit access and demand

II. Route Planning and Recommendations:

After several months of collecting and analyzing data and feedback from stakeholder meetings, three/four alternative routes each were proposed for both Charlestown and Everett. Each route was examined to determine capacity, population served, cost, and reliability and then prioritized based on this criteria. In some cases combining routes due to current needs and budget.

III. Branding and Future Planning: A major outcome of the shuttle study was the creation of short-term (1-2 years), mid-term (3-5 years), and long-range (5-10 years) plans for shuttle service routes to accommodate evolving development pipelines and community needs.

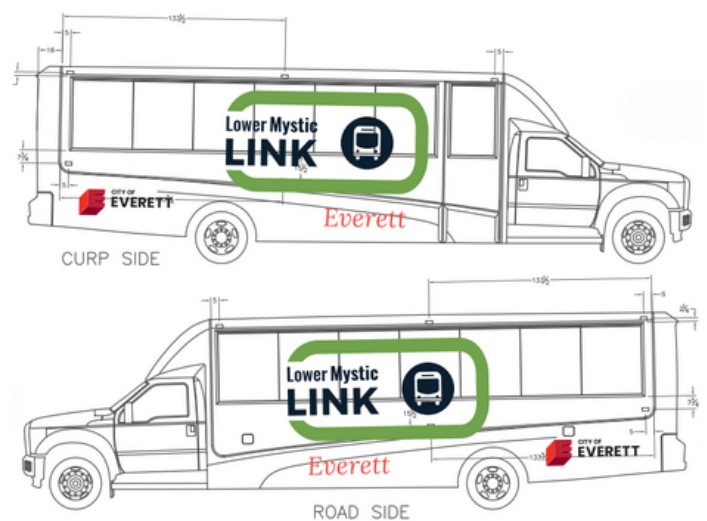
In addition to creating a road map for future last-mile gap service in the Lower Mystic region, the shuttle study has produced a joint branding of service for the area that crosses municipal lines. The cities of Everett and Boston, under the umbrella of the LMTMA, have created the Lower Mystic Link with branding that emphasizes the ease of which passengers can connect to transit service in the areas of Charlestown, Chelsea, Everett, Malden, Medford and Somerville for years to come.

Next Steps

As the Lower Mystic region continues to experience rapid growth, the TMA remains committed to advancing its mission of fostering sustainable and accessible transportation solutions. Through the collective efforts of stakeholders, the TMA plans to launch a re-imagined Everett Neighborhood Runner service now known as the Lower Mystic Link, which will begin service in Q2 of 2024.



Market Basket/ Chelsea Station to Sullivan Square via Everett Square



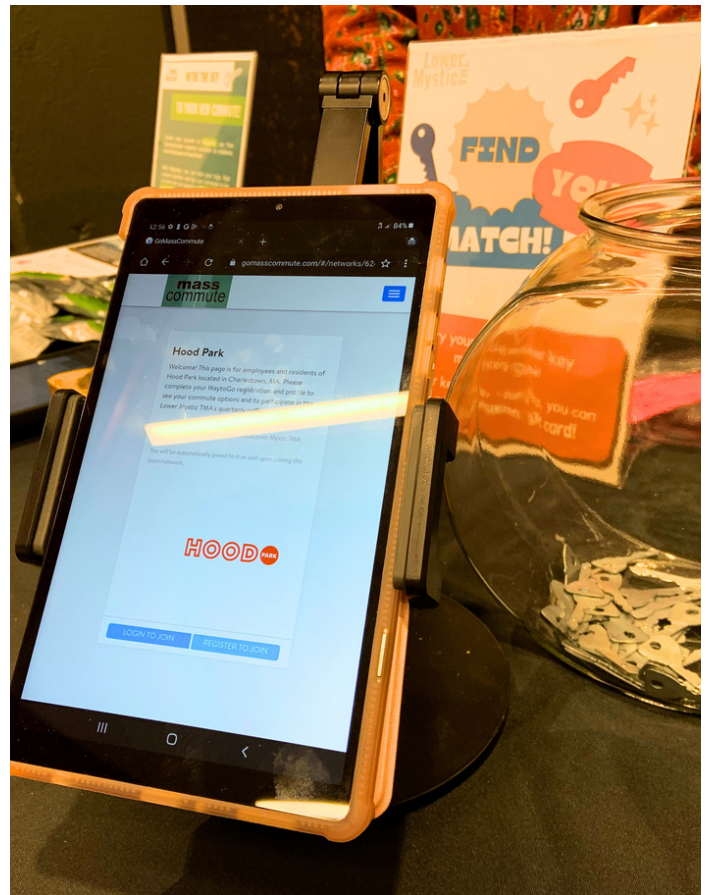
MARKETING & EVENTS

Hood Park

The Hood Park mixed-use development in Charlestown is the TMA's only Associate Member. Although Associate Members do not have access to all the TMA's benefits, they can use the WayToGo transportation resource to plan trips by mode, find bike routes, and connect with carpool matches. The TMA also developed a program exclusive to Associate Members which incentivizes individuals to log their trips on WayToGo for a chance to win a quarterly \$100 gift card raffle. Throughout the year, TMA staff engaged with students, residents, and employees of Hood Park by hosting a table at several events, including an introductory lunchtime event in the business campus, an evening event at The Harvey residential community, and an outdoor Earth Day celebration.

Vanpools

During the year, TMA staff also initiated the process for establishing an employee vanpool at Encore casino. To establish a vanpool, staff needed to first understand which employees were interested in joining a vanpool and where their commutes originated, so the TMA hosted an outreach event at the casino to formulate a list of potential vanpoolers. Based on the initial data gathered from this event and because the Rhode Island Public Transportation Authority (RIPTA) offers a generous subsidy towards vanpools that begin in the state, staff identified that a vanpool for Rhode Island commuters would likely be the easiest one to institute first.



With the RIPTA subsidy, it could cost travelers as little as \$100 per month to commute by vanpool to Encore. To put this into perspective, it costs approximately \$875 per month to commute to Encore from Rhode Island by car.

Planning for this initial vanpool will continue in 2024; TMA staff will work with Encore to include an additional employer subsidy for vanpoolers, organize an in-depth information session for Rhode Island commuters, and ultimately get the TMA's first vanpool on the road!

Water Transit Month

Water transportation is one of Metro Boston's greatest transportation assets. To raise awareness of this mode, the Lower Mystic TMA collaborated with the Seaport TMA and A Better City TMA to host their joint second annual Water Transportation Month in July. This year, Water Transportation Month overlapped with the first planned Sumner Tunnel closure, which only emphasized the importance of the TMA's outreach efforts.

Throughout July, the three TMAs held a photo contest. Individuals submitted pictures of their water transportation commute to win weekly prizes. Out of eighty-one submissions, one individual was awarded the grand prize: a one-night stay for two at Encore and dinner at Rare Steakhouse.

The month culminated in a Water Transportation Fair at Long Wharf in Downtown Boston, a new event organized by the TMAs in 2023. Several organizations participated by staffing a table during the event to share information about the water transit services they offer, including Encore, the MBTA, MassDOT, Seaport Ferry, and Boston Water Taxi.

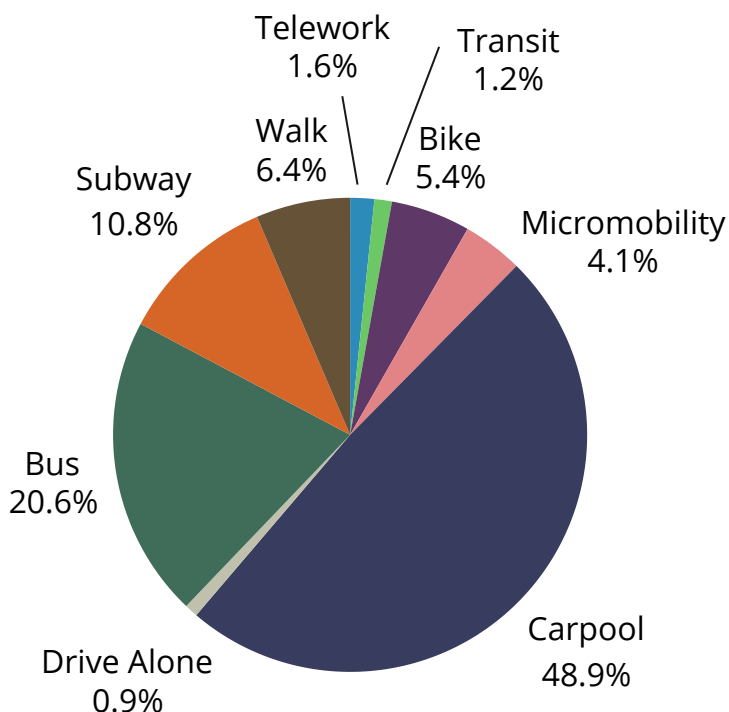
The event was also attended by MassDOT then-Secretary of Transportation Gina Fiandaca. Staff spoke with over thirty-five individuals who attended the event, and The Lower Mystic TMA is looking forward to establishing this as an annual celebration each July.



Wayto go HIGHLIGHTS

WayToGo is the Lower Mystic TMA’s “one-stop-shop” transportation resource for our members. Individuals can create a free account on WayToGo to join the TMA’s programs, including the Bluebikes subsidy, Emergency Ride Home program, Carpool Gas Card Program, and the WayToGo Rewards program. Member employees and residents are encouraged to log the trips they take to and from the Lower Mystic area, and TMA staff use this data to get a better understanding of what types of alternative travel modes people are choosing. At the end of 2023, there were 386 total participants in WayToGo, which is a 35% increase from last year. A breakout of traveler statistics is provided in the chart below.

Mode Split Data



5.4K

TOTAL TRIPS LOGGED

That’s over 14 trips logged per day, on average.



85 tons

CO2 REDUCED

The same amount of carbon emitted by 19 cars driven for one year.



91K

CALORIES BURNED

That’s the equivalent of running 35 marathons.



\$100K

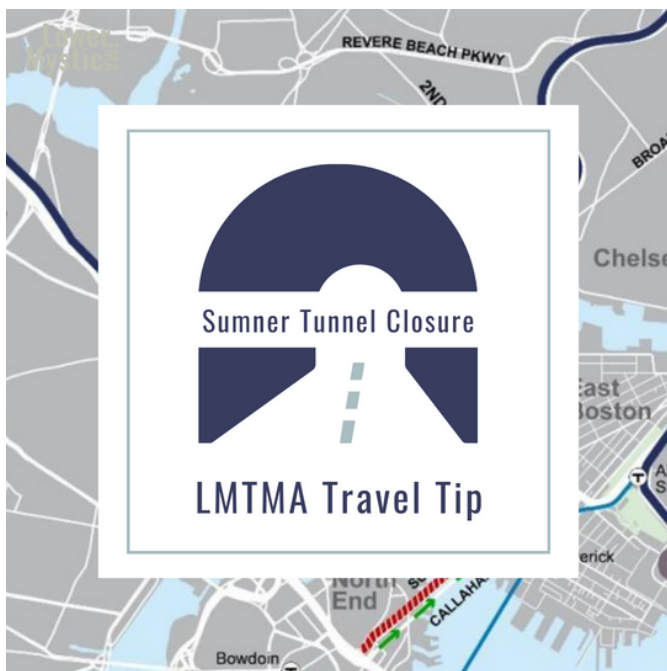
MONEY SAVED

That’s what 33,000 cups of Dunkin coffee costs.

ADVOCACY



In the spring of 2023, TMA Executive staff (along with members of MassCommute) met with MassDOT Secretary Monica Tibbits-Nutt and Deputy Secretary Hayes Morrison to discuss program design and funding mechanisms developed by MassCommute by which the \$25M in Bond Bill funding will be distributed to the fifteen Massachusetts TMAs. This process is ongoing, and a framework is expected to be in place for all TMAs to receive Bond Bill funds beginning in FY2025 (July 1, 2024). In addition to working on the Bond Bill, staff at the Lower Mystic TMA worked with Representative Jonathan Hecht (Watertown) to advocate for several TDM bills in the Massachusetts legislature that support the mission of the Lower Mystic TMA. Staff also worked with the MassCommute Managing Director to develop and implement a webinar - *Influencing Travel Choice in Massachusetts*, to promote TDM to communities, businesses, and developers. The event was attended by more than 80 people.



The LMTMA staff also served on the MassDOT Transit Mobility Group formed to address the eight-week closure of the Sumner Tunnel in the summer of 2023. This group of key stakeholders, TMAs, transit advocates, the MBTA, and MassDOT staff met for several weeks prior to the closure to ensure that the public was aware of the closure and to provide and market sustainable transportation options to mitigate the impacts on traffic. The group will convene again for the closure planned in the summer of 2024.