

**Massachusetts Bay  
Transportation Authority**

# Strategic Planning Overview: Setting Goals & Metrics

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# Context | The MBTA Needs to Make Big Changes

At a critical inflection point, the MBTA faces a unique opportunity to define internal goals to ensure the agency adapts & evolves alongside the changing region.

*Guided by our stated values and newly defined goals, we will measure success or determine course corrections via data-driven analytics.*

## ACTIONS

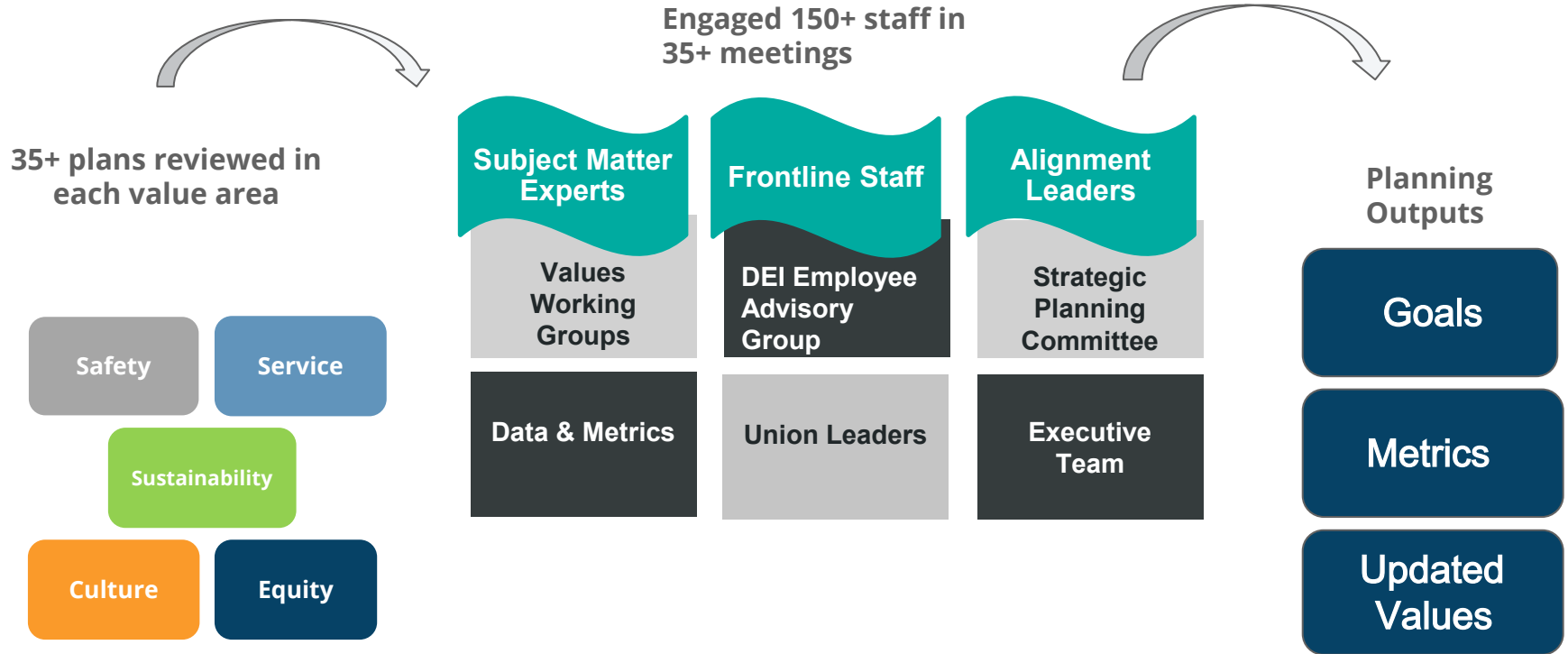
- Create a clear roadmap of how to prioritize among different projects.
- Clarify and articulate **multimodal priorities** aligned to our values.
- Consider human and monetary capital **costs and trade-offs** when decision-making.
- Empower departments and staff to create **project and team-based action plans to achieve objectives** based on priorities of Governor Healey, the Secretary, the Board, and GM Eng.
- Provide a forum for public engagement in **required planning activities**, such as Program for Mass Transportation (PMT) and the Capital Investment Plan (CIP).

# Strategic Planning Framework and Steps



# Strategic Planning Process

Over 150 Staff Engaged in nearly 35+ Discussions



# Strategic Planning




Refined Mission, Vision, and Values

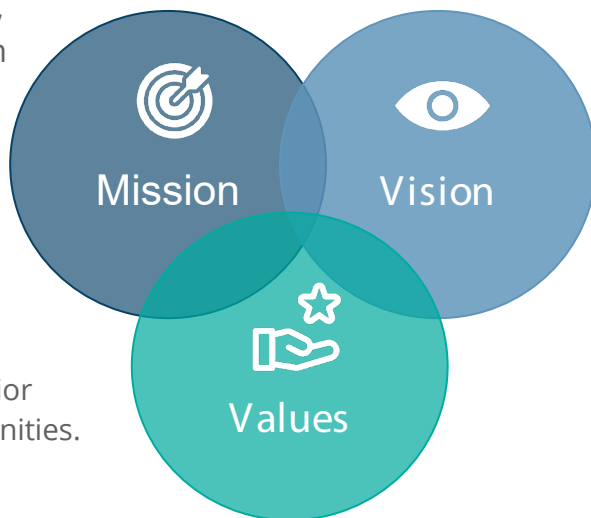


## Our Mission

We serve the public by providing safe, reliable, and accessible transportation

## Our Values

-  **Safety.** We put safety at the forefront of our work
-  **Service.** We endeavor to deliver superior service connecting people and communities.
-  **Sustainability.** We invest resources wisely in solutions for our team, our communities, and our environment.



## Our Vision

We envision a thriving region enabled by a best-in-class transit system

**Equity.** We commit to prioritizing the needs of our transit-dependent riders, our employees, and the economic regions we serve in decision-making processes to eliminate unjust and unintentional disparities.

**Culture.** We aspire to transform our culture to one that keeps people's well-being and safety at the center of everything we do.





# MBTA Strategic Goals

*Aligned to the Healey-Driscoll Administration Priorities*

## Values

Safety

Service

Sustainability

Equity

Culture

Empower and support staff to develop a culture which prioritizes and promotes safety

Modernize assets and improve connectivity, while ensuring MBTA property is maintained to a state of good repair

Ensure the experiences and perspectives of our staff and riders are accounted for through transparent decision making

Retain, attract, and invest in a diverse and qualified workforce that represents our ridership

Support the economic vitality of the region by providing riders with dependable, frequent, and accessible service

Increase the environmental sustainability and resilience of our transit system

Attract new riders, retain existing riders, and increase the percentage of transit-trips in the region

Communicate openly about our costs and the revenue needed to support our ongoing service and the growth of our system

## Goals

# Overarching Metrics for Monitoring Success



High-level metrics can be used to track progress towards goals and report out on implementation.

↓ Reduction in:

Injuries, and elimination of fatalities



The rate of carbon emissions



↑ Increase in:



Percent of assets modernized and in a state of good repair



Riders' satisfaction



Employee satisfaction



Mode share



Accessible trips



Staffing

# Align (and Build) the Team to Achieve Initial Actions

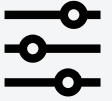


Some near-term examples:

- Adding key new **Executive staff** to strategically address operating and capital budget needs
- Focus on **hiring** needs across all departments, including assessing collective bargaining where necessary
- Refining **Capital Investment Plan scoring** process this summer and fall to ensure all CIP projects will help advance agency goals
- Meeting our environmental goals through the development of **sustainability planning**
- Partnering with the Office of Transportation Planning to **begin the scoping** of the next Program for Mass Transportation



# Understand the Baseline and Assess Gaps



Finalizing agency wide metrics and create **high-level dashboard** to assess progress and set benchmarks and targets



Building agency goals into **performance management** system



Conducting employee **survey** of all staff



Ensure **targets align to priorities** and can be meaningfully used to **track progress**



Completing **workforce culture** assessment



Many actions stemming from the FTA SMI require focus on the **root causes** of system issues

# Engage Stakeholders in Action Planning

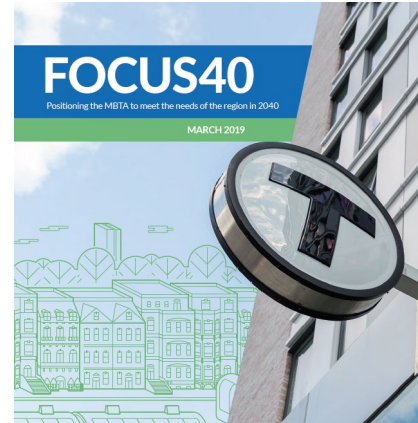


## Public Process:

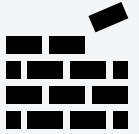
- The MBTA's Goals and Metrics will provide a foundation for **required planning activities**, like the next Program for Mass Transportation, PMT (Focus 40) and the CIP
- The PMT will provide a public process for stakeholders to weigh in on the **costs and trade-offs** of potential long-term investments based on the Values, Goals, and Metrics defined by the MBTA
- Partnering with the Office of Transportation Planning to **begin the scoping** of the next Program for Mass Transportation

## Staff Engagement:

- Finalized Goals and Metrics will be **communicated to all staff** to ensure staff know how their work fits into the big picture
- MBTA staff will also engage in developing **action plans** – detailed objectives and steps the agency could take to address each of the goals



# Assess Resources, Implement, and Refine Plans



- After engaging staff and the public on the projects and objectives to meet goals, **assemble the resources** needed to achieve the goals (on a one-year cycle and longer-range horizon to support the change)
- **Implement** projects to achieve goals
- **Track and report out of progress** against defined metrics
- Reevaluate and **refine strategic planning** frequently to respond to changing context and needs