



# **MBTA Strategic Planning**

Authority-Wide Goals and Metrics  
Final Report January 2024





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# Letter from the General Manager

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Dear Colleagues,

I'm pleased to introduce the MBTA's Strategic Plan that was presented to our Board of Directors in August of 2023. As we launch this plan, the MBTA is in the midst of coping with the residual impacts on ridership since the COVID-19 pandemic, responding to the FTA safety management inspection, and implementing the Track Improvement Plan to reduce slow zones and eliminating speed restrictions. Now, more than ever, it is important to have a long-term plan that guides the organization forward as we tackle these short term, complex challenges.

Our mission remains constant – to serve the public by providing safe, reliable, and accessible transportation. This plan includes our previous statements of our values of safety, service, sustainability, and updated values for equity and culture. These values better reflect who we are and who we want to be and our impact on our employees, riders, and the communities we serve, and prioritizes people and safety in the work we do.

Our Strategic Plan is a living document that was developed with input from people across the organization. It provides the core strategic vision for our organization, with the flexibility to evolve to meet the ever-changing, and sometimes unexpected, needs of our customers and region. Executing on the Strategic Plan will help restore the MBTA's reputation, building a safe, reliable and resilient system customers can depend on, and will evolve an organizational culture that values a diverse workforce that represents our ridership.

The goals highlight developing a safety culture; modernizing our system, improving connectivity, and bringing our assets to a state of good repair; employing transparent decision-making; building and retaining a diverse workforce; recognizing the importance of our service and its impact on our communities and our economy; enhancing system sustainability and resiliency; increasing ridership and supporting mode shift; and improving open communication about the costs and revenue needed to support our service.

I will provide periodic updates and more details about our goals, and the strategies and initiatives that are being undertaken to achieve those goals. In the meantime, I ask that you to take the time to familiarize yourselves with the goals and to consider how your work aligns with them. Using this plan as a guide, we will build on the significant progress we've already made, support the state's economy, and execute on our long-range vision.

Thank you,

A handwritten signature in black ink, appearing to read 'Phil Eng', with a stylized, flowing script.

Phil Eng  
General Manager & CEO

# Introduction

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The Massachusetts Bay Transportation Authority (MBTA), or the Authority, is the largest transit system in Massachusetts and one of the oldest in the US, providing subway, bus, commuter rail, ferry, and paratransit service to eastern Massachusetts and parts of Rhode Island. The MBTA employs more than 7,000 employees who serve our customers. Throughout 2022, the MBTA engaged in a staff-led strategic planning process to guide the Authority's work over the coming decade, to align our internal priorities, and to inform our long-range planning activities.

The purpose was to set Authority-wide goals and metrics, built on the MBTA's previous strategic planning work in 2020. The MBTA's strategic planning is an ongoing process that will be revisited over time as the Authority evolves. The goals and metrics are intended to guide both day-to-day decision-making and help the Authority think longer-term about how to achieve its desired outcomes and embrace the organization's values.

The planning process was designed to support the Authority's ongoing transformation, by breaking down silos within the Authority, elevating the importance of people at the MBTA, and responding to current challenges and disruptions, reframing them as opportunities for transformation. These opportunities and challenges included the FTA safety management inspection, workforce shortages, and simultaneous transitions in MBTA, MassDOT, and government leadership. The process leveraged the knowledge of the MBTA's staff as experts on the Authority's needs and on the important role that workplace culture has on both the workforce and their ability to achieve the organization's goals.

The MBTA recognized it had a unique opportunity to set long range goals and measures for success while at the same time promoting Authority coordination, integration, and planning. This Authority-wide, staff-driven process fully examined possible

priorities and goals to insure they are implementable. Although built upon the earlier strategic planning work, this plan went further by:

- identifying potential conflicting priorities across departments,
- assessing projects across the Authority that may not meet, and may even potentially impede, broader Authority goals,
- ensuring that all staff are prepared and ready to implement the goals.

In a previous planning phase in 2020, the MBTA established the mission, vision, and values for the Authority, creating a high-level sense of purpose in the T's work. The Authority's mission and vision have not changed in the latest plan; however, this recent planning refreshed the Authority's values and took the work further by establishing goals to guide the Authority's actions and metrics to help us track progress. Over the course of four months, a diverse group of more than 150 staff from across the Authority were actively and intentionally engaged in crafting goals and metrics to guide the MBTA's work. This document reflects the expertise, time, intention, and experience of the MBTA's staff and sets a clear direction for the Authority's work in the coming years.



# Strategic Planning Background

## Strategic Planning Purpose

Combined with the Authority's mission, vision, and values, the goals and metrics defined in this report will guide the work of the MBTA over the coming years as it responds to operation and safety challenges and transforms to meet both external demands and the internal culture changes needed to better support our staff, riders, and the regions we serve. Our strategic plan has been shaped by our previous plans and commitments as well as by the input and expertise of our workforce. The plan is intended to:

- Provide an opportunity for the Authority to adapt and evolve to changes in the region.
- Help the Authority prioritize goals, its employees, and monetary capital.
- Clarify multimodal priorities aligned to our values and incorporate those priorities into planning and financial programming.
- Support the alignment of our internal departments and staff to Authority-wide goals.
- Determine metrics for success that can be used to track progress.

## Framework and Approach

In our ongoing strategic planning, the MBTA has aspired to shift the Authority's culture by both centering the experiences of our employees and by agreeing to a framework before setting actions or prioritizing specific projects. Therefore, in 2020 we started from broad agreement on what we do and who we are,

and moved to what we want to accomplish and how to measure our progress in our 2022 work. In the coming years, the MBTA will continue its strategic planning by defining the steps we will take to achieve our goals. The role of these various strategic planning elements is described below:

*Figure 1: Strategic Planning framework*

<b>Mission</b>	what we do	✓
<b>Vision</b>	what we aspire to be	✓
<b>Values</b>	the principles that guide us in our work	✓
<b>Goals</b>	how we achieve our vision and mission	✓✓
<b>Metrics</b>	how we will track our progress	✓✓
<b>Objectives</b>	our priorities to achieve our goals	✓✓✓
<b>Strategies</b>	specific steps to achieve objectives	✓✓✓

✓ Completed in 2020 | ✓✓ 2022 Project | ✓✓✓ 2024 Work

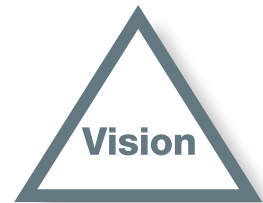
Through the development of these strategic planning elements, the MBTA will have a comprehensive framework to guide the Authority's work in the years to come.

# 2020 Mission, Vision, and Values

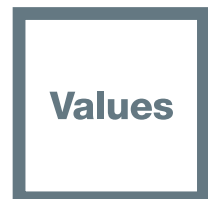
In its 2020 work, the MBTA developed the mission, vision, and values of the Authority and focused on improving operations by addressing key internal organizational priorities. This work served as an opportunity to create a shared sense of purpose while beginning the work of reshaping the Authority's culture and highlighting pressure points for the workforce. Through this work, the MBTA developed the following:



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



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



Our work is guided in the principles of safety, service, equity and sustainability.

This process also revealed that the challenges the organization faced were deeply rooted in the Authority's culture. In response, the MBTA identified three internal priority areas for continued improvement and investment:

## **Culture, Collaboration and Communications**

Improve internal engagement and collaborative decision-making processes

## **Workforce Investments**

Recognize our diverse talent and provide opportunities for meaningful professional development and career pathways

## **Diversity, Equity, and Inclusion**

Invest in becoming a more diverse, equitable, and inclusive organization

Given the timing of the pandemic and the unexpected burdens on the system that followed, the MBTA temporarily paused the continuation of its strategic planning until the Fall of 2022. However, the Authority made progress in aligning its work to its values and developing new actions to address the three internal priorities set in 2020.

## Early Actions Supporting the 2020 Strategic Plan

### Culture, Collaboration, and Communication

- Improved employee communications, particularly for frontline employees through installation of digital screens (TCOMMS), use of employee newsletter (*Between The Lines*), and creation of new intranet site (TSTOP).
- Implemented an annual staff survey to gather regular feedback from staff about employee satisfaction and workplace culture.

### Workforce Investments

- Developed a new leadership development training program for managers, training 150 supervisors to date in adaptive leadership.
- Launched the ideal program – Individuals Defining Excellence and Leadership – designed to build on the knowledge base of MBTA employees and to expand their awareness of the challenges the MBTA faces in safety, service delivery, and public perception.

### Diversity, Equity, and Inclusion

- Formed a DEI Employee Advisory Council consisting of 15-20 staff representing many identities and roles within the T.
- Hired staff to support a new department focused on diversity, equity, and inclusion.

# 2022 Strategic Planning: Process Overview

## Process Overview

From August through December 2022, the MBTA returned to its strategic planning work to build on the existing mission, vision, and values and deepen the Authority's alignment by establishing goals and identifying metrics to track progress. Throughout the fall, more than 150 MBTA staff engaged in a series of meetings to frame the Authority's goals and metrics, as well as to identify next steps for achieving the goals. The development of the Authority's goals and metrics was orchestrated through an intentional process that engaged stakeholders and built upon the foundation of the MBTA's past planning efforts.

## Re-affirmed Mission and Vision

As this next phase of the strategic planning process commenced, we determined it was important to ground the work to the 2020 strategic plan. The mission and vision statement were that grounding. At the start of the process we re-affirmed our commitment to the previously defined mission and vision.

**Mission:** We serve the public by providing safe, reliable, and accessible transportation.

**Vision:** We envision a thriving region enabled by a best-in-class transit system.

## Process Design

The MBTA identified key components to frame the project process.

- **We agreed to focus on the “why” of planning.** The process was deemed as important as the outcomes: it was designed to engage employees and create alignment around organizational priorities. We committed to aligning with the

concurrent FTA safety management inspection report findings, but not to lose momentum since the development of shared goals would be an opportunity to respond to the safety concerns and other challenges while not losing sight of the need to plan for the future.

- **We agreed to be honest about real resource constraints and the gap between what we have and what we need for success.** For years, the MBTA has prioritized operations despite financial, operational, and labor constraints. In this work, we agreed to focus on the right goals, while being honest that some goals may require changes to resources to achieve.
- **We agreed that strategic planning at the T would be iterative and ongoing.** While this phase of the project was designed to update values and identify goals and metrics, we recognized that planning would need to be continued later to flesh out objectives and strategies. Additionally, we built into the process the expectation that the plan would be periodically reassessed and refreshed as necessary.

## Document Review

To begin the work to identify goals and metrics, we needed to gain an understanding of the current work and priorities of the MBTA. A review of plans and key documents was undertaken to understand what goals and commitments had been made by the Authority and to gather information from MBTA staff about their department's goals, data sources, and expectations for the future.





## Inventory

This review made clear that the MBTA has made commitments to our riders and the communities we serve to make improvements in service and reliability and to expand access to transit. Additionally, the goals and metrics in these plans and documents were not consistent and lacked an overarching focus. There was a lack of clarity about what the MBTA should prioritize with its limited financial and staffing resources.

Since the analyzed plans provide significant guidance for the MBTA's work today, the findings from this analysis informed the first iteration of the MBTA's goals and metrics. This rolling up of existing plans into the goals and metrics made clear that the Authority is building on existing work with its strategic planning, rather than starting from a blank canvas.

## Facilitation Design

The facilitation process was intentionally structured to engage a broad range of MBTA staff with diverse roles and experiences. The process included a range of subject matter experts across the Authority including executive staff, frontline staff, and union leaders from across the Authority. It was also designed to center MBTA staff as the subject matter experts for determining the agencies priorities and to build on the previous strategic planning report and the FTA's safety management inspection, that made clear many MBTA challenges are rooted in addressing the Authority's internal culture.

The goals and metrics work was driven by cross-departmental working groups, each with a separate charge. Subject matter experts were assigned to working groups to draft goals aligned to each of the MBTA's four values, plus a group focused on a new area: culture. These groups had honest conversations about the MBTA's goals, as well as the interconnections and tradeoffs between goals. A separate group of subject matter experts also convened to develop draft metrics to track success on each of the proposed goals.

# 2022 Strategic Planning: Goals and Metrics

Two additional teams, the MBTA's executive team and the Strategic Planning Committee for Implementation (SPCI), shaped the structure of the planning process to ensure maximum engagement from MBTA staff and elevated strategic topics for leadership discussion.

Each of the engaged groups is described in more detail below.

*Figure 2: MBTA Staff Engagement Approach*

Subject Matter Experts: Values and Data Working Groups	
<b>Value Specific Working Groups</b>	Five working groups of MBTA staff subject matter experts provided insight and expertise to propose goals aligned to each of the organizational values.  The groups focused on: <b>Safety, Service, Sustainability, Equity, Culture</b>
<b>Data + Metrics Group</b>	An inter-departmental group of data experts proposed metrics to track the MBTA's progress in achieving each goal.
Front Line Employee Perspectives: Crosscutting All Values	
<b>DEI Employee Advisory Council</b>	Provided input to ensure strategic goals and priorities included a broad range of employee perspectives.

Subject Matter Experts: Values and Data Working Groups	
<b>Union Leadership</b>	Provided crosscutting feedback focused on implementability and the needs of the MBTA's workforce.
Alignment Across Values	
<b>Strategic Planning Committee for Implementation (SPCI)</b>	Provided big picture insights and process guidance to ensure a smooth project process, maximum engagement, and feedback on draft deliverables.
<b>Executive Team</b>	Provided feedback and sign-off on the project process, outcomes, and all final deliverables before being shared with stakeholders. The General Manager's direct reports served as an anchor for all the work.



## Values Refined

### Equity and Culture Value Statements

The process of developing Authority-wide goals and metrics prompted a fresh look at the MBTA's pre-existing mission, vision, and values. While there was wide-ranging agreement to carry over the values of safety, service and sustainability from our previous strategic planning work, the equity and workplace culture participants acknowledged the need to further define the organization's values and aspirations regarding equity and culture to develop more robust goals in these areas. Equity participants noted that the previous statement had emphasized fairness more than equity and had not adequately accounted for impacts on geographic areas adjacent to the MBTA's service and facilities. The culture group advocated for the creation of a new value statement which would consolidate the internal priorities set in 2020 (collaboration, communication, and culture; workforce investments; and diversity, equity, and inclusion) into a single value statement that prioritized people's well-being. As a result, the equity and culture working groups, as well as the DEI Employee Advisory Council, refined the equity statement and drafted a culture statement for the MBTA.





## Values



**Safety:** We put safety at the forefront of our work.



**Service:** We endeavor to deliver superior service connecting people and communities.



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



**Sustainability:** We invest resources wisely in solutions for our team, our communities, and our environment.



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



**Accessibility:** We commit to removing physical, operational, and informational barriers so riders of all abilities can travel with independence and confidence.



The MBTA DEI Employee Advisory Council

advancing the transportation system of the future, prioritizing safety and reliability, enhancing and increasing system accessibility, and promoting environmental sustainability and resiliency.



The draft metrics were developed with insight from the data and metrics working group, which included individuals working on capturing and using data to inform decisions across many areas of the MBTA. Currently hundreds of data points are routinely gathered, analyzed and reported upon. However, there is not a single data source that every team member knows about and has access to, and no overarching metrics that bind the work of the MBTA's 7,000+ employees and contractors together for a shared purpose.

Developing draft metrics that span all the MBTA's operations was met with a sense of urgency, as without them work will continue to be siloed and inefficient, and safety problems will continue to exist. To address this challenge and ensure that data-gathering and data-informed decision-making support the intentions and goals outlined in the strategic plan, the data and metrics group aimed to cull the indicators and data points necessary to assess the Authority's performance at a high level over time.

*Figure 3: MBTA Overarching Metrics*

High-level metrics can be used to track progress toward goals and report 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



Rider satisfaction



Employee satisfaction



Mode share



Accessible trips



Staffing diversity

Clear goals and metrics help the organization and staff on a day-to-day basis to align decision-making, especially when every decision is made amid constrained resources. Through alignment with the mission, vision, and values along with our newly defined goals, we will be better equipped to achieve desired outcomes, measure success, or determine course corrections via data-driven analytics.

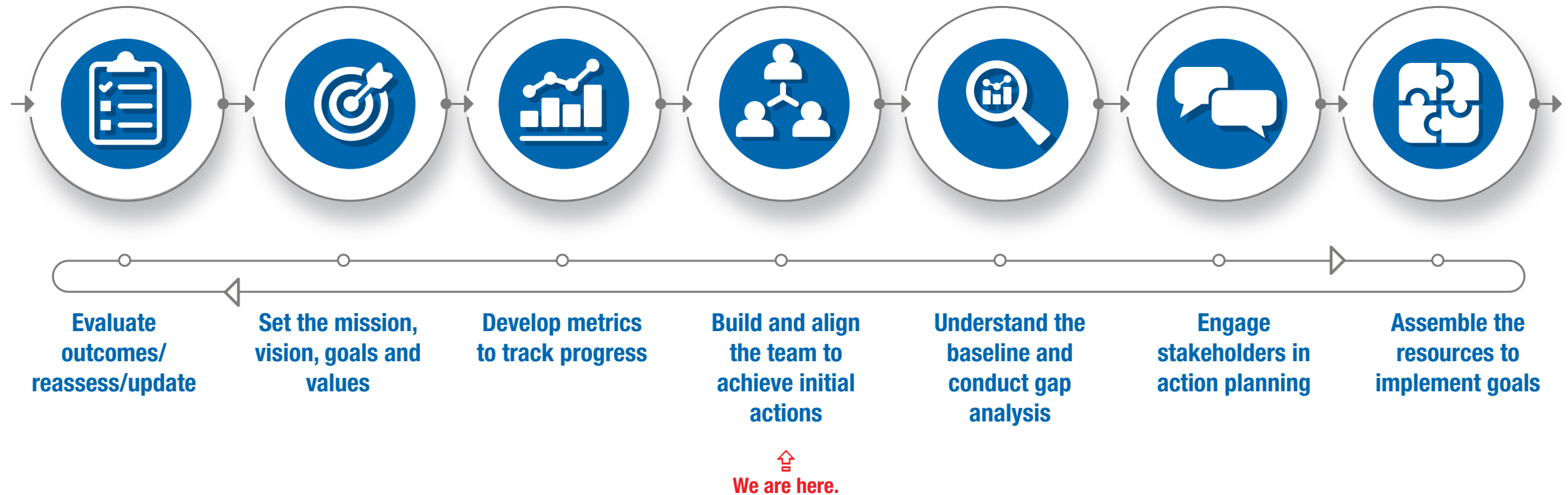


## What's Next?

With its goals and metrics complete, the MBTA will turn its attention to how to implement the goals and track progress toward their completion. We believe strategic planning is about planning as a process. The overall strategic planning process the MBTA is undertaking is depicted in Figure 4 and discussed in more detail below.

Figure 4 : MBTA Strategic Planning Process Overview

## MBTA Strategic Planning Process



## Where We Are in the Process and Next Steps

The MBTA's strategic planning is iterative and will evolve over time. Internally, we will be working to communicate the finalized goals and metrics to all staff to ensure they know how their work fits into the big picture. We are in the process of realigning the organizational structure and adding staff to meet the goals set out in our plan. As a next step, we will be assessing our baseline and identifying gaps in how our existing work plans address the new Authority-wide goals. We will finalize our Authority-wide metrics in a dashboard and set targets for how much progress we can feasibly make toward each goal. We are also developing the baseline data we will track our progress against. For example, an annual staff survey will provide data on employee satisfaction, and a workforce assessment will set the baseline for how many workers we need.

The goals and metrics included in this report will guide the MBTA both in internal communication with our staff and external engagement with stakeholders across our service area.

The MBTA's goals and metrics will form the foundation for the Authority's required planning activities, including Program for Mass Transportation (PMT) and the Capital Improvement Program. 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, in partnership with MassDOT's Office of Transportation Planning.

Internally, we will be working to communicate the finalized goals and metrics to all staff to ensure each employee understands how their work fits into the big picture. We will also incorporate the goals into Authority performance management processes and use them to guide MBTA departments in detailing the objectives, strategies, and activities that the Authority will take in the coming year to address each of the goals.

A key component of our planning process is to evaluate, reassess, and update. The goals and metrics are meant to guide the organization, and will evolve as the Author-

ity and external influences change. Metrics will be used to track our progress and to indicate where a course correction is required, in addition, unforeseen changes in the environment in which we operate may indicate a need to reevaluate and refine our strategic plan.

Since the goals arose from an analysis of the MBTA's existing plans, projects, and staff-driven priorities, there are many actions already underway to achieve each goal. While not a comprehensive list, some of the major actions already underway to meet and achieve each goal are included below.

*Figure 5: 2022 Strategic Planning: Activities Underway*

### Activities Underway

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

- Safety Management System (SMS) Implementation
- Distribution of updated Personal Protective Equipment to all staff

#### **Modernize assets while ensuring MBTA property is maintained to a state of good repair**

- Implementation of recommendations in the Transit Asset Management Plan (TAMP)
- Green Line Transformation, Orange Line Transformation, and Red Line Transformation programs

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

- DEI Employee Advisory Council
- Employee Concerns Hotline
- Employee survey

## Activities Underway

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

- Authority-wide workforce assessment and development of 5-year hiring goals
- Development of new employee resource groups
- Implementation of multiple new training programs for managers

### Provide a dependable, frequent, and accessible service that customers love

- Implementation of Plan for Accessible Transportation Infrastructure (PATI)
- Opening of the Mobility Center for individuals with disabilities
- Further implementation of the Better Bus Program, including bus priority in collaboration with municipalities
- Beginning work with MassDOT on the next Program for Mass Transportation, which will use the MBTA's goals

### Increase the environmental sustainability and resilience of our transit system

- Investments in Bus Fleet and Facility Modernization program
- Bus fleet electrification
- Resiliency plans by asset and mode

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

- Implementing Bus Network Redesign to ensure bus trips are competitive and attractive to riders
- Opening of South Coast Rail
- Implementation of early recommendations from Rail Vision (clock-face schedules, new regional rail connections between commuter rail and Orange Line)

## Activities Underway

### Communicate openly about our costs and the revenue needed to support our ongoing work

- Continuation of a robust discretionary grant strategy
- Using real estate to bring value to the MBTA
- Refining CIP scoring to ensure all CIP projects advance the goals and reflect our values

This strategic planning work represents an opportunity to shape the future of the MBTA for its riders, its employees, and impacted communities. The strategic plan will guide the Authority's work, clarify priorities and projects, and improve transparency in the MBTA's decision-making and performance management. While there is more work to be done to develop objectives and strategies and to create cross-departmental alignment to achieve these goals, this work represents a turning point and an opportunity to shape the future of the MBTA and the regions we serve.

