



**Massachusetts Bay
Transportation Authority**

Final Strategic Plan

Fiscal and Management Control Board

April 24, 2017

Strategic Plan Framework

Objective

- Where we want to be

Strategies

- What we need to do

Tactics

- How we're going to do it

Strategic Planning Process

- **Initiated April 2016 with Board/Senior Management retreat**
- **Two day-long stakeholder forums:**
 - **October 2016 for initial input**
 - **March 2017 to review draft plan**
- **Monthly Steering Committee meetings for policy guidance and coordination**
- **Weekly Working Group meetings of designees from across the Authority**
- **Draft Plan posted on March 20, 2017**
- **Final Plan for adoption April 24, 2017**

Vision/Mission/Values Statement

VISION

The MBTA will provide globally premier, safe, reliable, convenient, accessible, cost-effective, and sustainable transit service to its communities and customers.

MISSION

The MBTA provides access and moves people while strengthening and improving the economic health of the region.

VALUES

All members of the MBTA community will embrace:

- Safety of the public and staff as top priority
- Delivering a superior customer experience
- Serving a diverse customer base
- Transparency in the way business is conducted
- Honesty in all matters
- Respect for the public, all employees, and private partners
- Flexibility to adapt and evolve
- Commitment to data-driven decision-making
- Accountability to our customers and funders
- Continuous focus on driving productivity and operating the system most efficiently
- Environmental stewardship

Strategic Plan – Five Overarching Priorities

- *Reinvent the bus system with reliable service, improved amenities, and a comprehensive redesign of the entire bus network*
- *Accelerate capital delivery to eliminate the State of Good Repair backlog in 15 years*
- *Deliver reliable service with affordable fares with a new Automated Fare Collection system by FY2021*
- *Continue to drive down operating costs and increase non-fare, own-source revenues to \$100 million by FY2021 in order to eliminate the need for annually appropriated operating support*
- *Complete planning for fleet and facilities, as well as service, to achieve a specific capacity target (to be established by the end of 2017) that supports economic development and ridership growth*

Strategic Plan Objectives

Safety

Sustain the MBTA's organizational commitment to ensuring the safety of passengers, the workforce, and the general public

- *Implement Positive Train Control for Commuter Rail*
- *Provide safe and reliable transit service while preparing for the delivery of new vehicles*
- *Optimize the safety of the Green Line with proactive interventions*
- *Ensure the safety of passengers, operators, and the general public through ongoing improvements in bus operations*
- *Provide a safe environment for the MBTA workforce*



Strategic Plan Objectives

Customers

Deliver exceptional service for customers, focusing on reliability and a consistent customer experience

- *Improve service delivery and the customer experience focusing first on the bus system*
- *Implement a new fare collection system and expand flexible fare options*
- *Reinvent the bus system moving from comprehensive service planning to network-wide redesign*
- *Provide accurate and real-time customer information*
- *Provide a clean, comfortable environment in our stations*

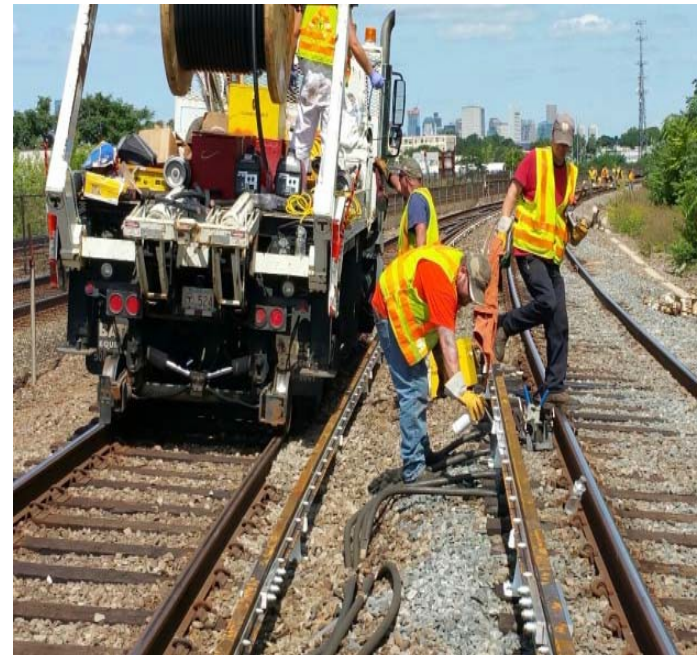


Strategic Plan Objectives

Infrastructure

Bring all of the MBTA's assets, including fleets and facilities, to a state of good repair within 15 years

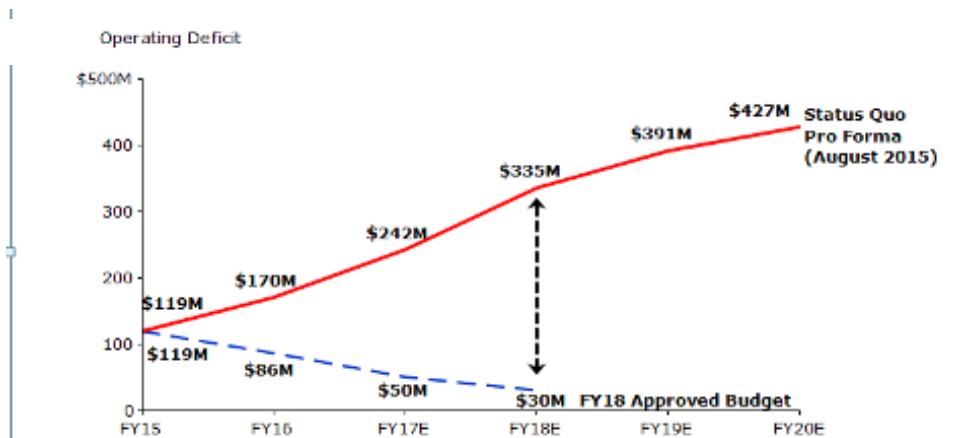
- *Expand capital delivery capacity to achieve a minimum of \$1 billion in annual State of Good Repair spending within four years and eliminate the backlog in 15 years*
- *Create and effectively manage capital delivery capacity*
- *Implement asset management and life-cycle maintenance for all current and future MBTA assets*
- *Recognize and address the SGR needs of business processes and information management*



Strategic Plan Objectives

Fiscal Sustainability

Operate in a fiscally sustainable manner without the need for annually appropriated operating support



Note: MBTA Management, in process of recasting the pro forma, Operating Deficit does not include Additional State Assistance of \$155M in FY16, \$187M in FY17 Recast, and \$187M in FY18 (Note \$60M will be directly deposited in "Capital Maintenance Lockbox")

- *Link resources to strategic planning and results*
- *Generate \$100 million in non-fare, own-source revenue by FY2021*
- *Continue to develop a procurement process that serves Operations*
- *Improve productivity and cost-effectiveness through a combination of changing internal business practices and work rules, and using private sector contracts and partnerships*
- *Develop capital financing analytical capacity*

Strategic Plan Objectives

Accessibility

Ensure an accessible, human-centered system both by expanding accessibility, and providing high quality and sustainable paratransit service for those unable to use the fixed-route system

- Develop and begin implementation of strategy for expanding accessibility*
- Institutionalize accessibility improvements throughout the system*
- Embrace a mobility management philosophy, provide education and incentives to customers to encourage use of fixed-route services whenever possible*
- Improve the quality and cost-effectiveness of The RIDE*



Strategic Plan Objectives

Workforce

Transform the T into an organization with a workforce that can deliver safe, reliable, and high-quality service to its customers

- *Transform the Human Resources organization from transactional processing to strategic human resource management*
- *Develop a diverse and talented workforce through improved recruitment, training, and performance management*
- *Engage and recognize the MBTA workforce*

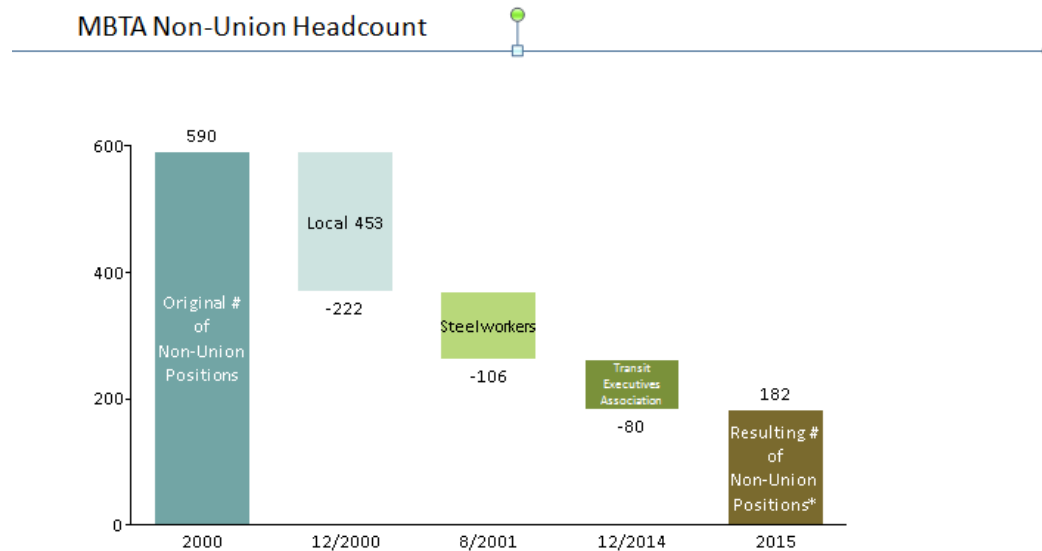


Strategic Plan Objectives

Management

Attract and retain a world-class management team that is accountable to the Board and senior leadership as well as the taxpayers, riders, and communities that fund the MBTA

- *Attract and retain a world-class management team*
- *Expand depth of management accountability*
- *Develop internal career paths*
- *Establish contract management capacity to ensure cost-effectiveness and quality of contracted and outsourced services*



Strategic Plan Objectives

Environment

Prioritize environmental stewardship and climate resiliency

- *Assess systemwide vulnerability to climate and weather stressors*
- *Quantify and minimize environmental impacts*
- *Inventory and mitigate GHG emissions*



Governance

Recommend a post-Fiscal and Management Control Board structure

- *Recommend a post-Fiscal and Management Control Board structure*
- *Ensure the CEO/GM has an adequate span of control*
- *Make a dedicated Board of Directors a permanent institution for the MBTA*



Brian Lang (not pictured) is also a member of the FMCB

Strategic Plan Objectives

Capacity

Increase core capacity to support economic development and accommodate ridership growth



- *Modernize and increase the capacity of the system to accommodate increased ridership driven by population and job growth*
- *Develop strategic vision for the future of Commuter Rail*
- *Accelerate efforts to keep pace with economic growth (Seaport, Kendall, Dudley, Logan access, Allston Landing, the Longwood Medical Area, and specific corridors of concern – 1-93 N/S, and I-90 to Logan)*
- *Envision a Green Line capacity improvement program*

Strategic Plan Next Steps

- *Hire a new General Manager/Chief Executive Officer*
- *Ensure the GM/CEO has adequate and fully dedicated resource availability*
- *The GM/CEO should ensure that strategic plan initiatives are the foundation for future operating and capital improvement budget requests*
- *Establish annual State of Good Repair targets and monitor progress through a fully implemented asset management system*
- *Complete the Focus40 planning process*
- *Refine approach to comprehensive redesign of the bus network*
- *Continue to refine the post-FMCB future governance structure for the MBTA*
- *Develop a five and ten-year operating expense proforma, and develop a five and 20-year capital plan*
- *Address rising pension costs*
- *Report on progress annually and regularly revisit and update the plan*