MBTA Whistle-Stop Tour: Strategic Planning

Sandy Johnston, Deputy Director of Regional Transit Planning
Goals for Today

- Begin to build a relationship between MBTA Strategic Planning and municipalities/subregions
- Familiarize attendees with MBTA Strategic Planning as a department and as a process
- Introduce Sandy Johnston as a point of contact and helper navigating the MBTA
- Identify points of interest (projects, processes, plans) for future MBTA presentation and discussion
Why Partnership Matters

“Commuter Rail tracks were damaged when severe flash flooding on September 11 overwhelmed the City’s drainage system and washed away the ground under both Commuter Rail tracks near Leominster Station...In partnership with the City of Leominster, Keolis crews laid 188 feet of concrete pipe to repair and improve the drainage system in the area.”

About MBTA Strategic Planning
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.

- 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).
What Does Our Team Do?

STRATEGIC PLANNING
- Strategic planning
- Metrics and targets
- Telling the story

REGIONAL PLANNING & PARTNERSHIPS
- Partner engagement
- Shaping/influencing policy
- State of the practice
- Convening across modes and departments

REGIONAL PROJECTS
- Multi-modal coordination
- Context-sensitive decisions
- Connecting planning to projects

ORGANIZATIONAL CULTURE
- Culture Committee
- Data analysis
- Communication
- Leadership Development

LONG-RANGE PLANNING
- Long-range plans and studies
- Internal and external plans
- Defining operational needs
- Strategic thinking ahead

STRATEGIC INITIATIVES
- Innovation
- Climate
- Funding strategy
Who’s Doing the Work

General Manager

Capital
Operations
Safety
QCO
Policy and Strategic Planning
Systemwide Accessibility
Paratransit
Railroad Ops
CAO

Capital Strategy
Fare Policy & Analytics
Transit Policy
Strategic Transit Planning
Climate Policy & Planning
Strategic Transit Planning

Lynsey Heffernan
Chief of Policy and Planning

Laura Gilmore
Senior Director for Strategic Transit Planning

Sandy Johnston
Deputy Director of Regional Transit Planning

Jay Maddox
Deputy Director of Regional Projects

Janet Baker
Deputy Director of Strategic Planning
Mission, Vision, Values

**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.

**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.
MBTA Strategic Planning Values and Goals

**Values**

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

- **Modernization and State of Good Repair**
  - Efficiently modernize assets and improve connectivity, while ensuring MBTA property is maintained to a state of good repair

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

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

- **Service and Economic Vitality**
  - Support the regional vitality by providing a dependable, frequent, and accessible service that riders love

- **Sustainability and Resilience**
  - Increase the environmental sustainability and resilience of our transit system

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

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

**Goals**

- Safety
- Equity
- Service
- Sustainability
- Culture
- Safety | Equity
- Safety | Service
- Sustainability | Equity
- Equity | Culture
- Sustainability | Culture
- Safety | Sustainability | Service
- Sustainability | Service
- Sustainability | Equity
Expression and Implementation of MBTA Strategic Planning

MBTA Strategic Values, Goals, and Objectives

MassDOT Beyond Mobility Statewide Plan

- Capital Investment Program (CIP)
  - 5-year rolling capital plan
  - Individual capital projects

- Program for Mass Transportation (PMT)
  - Strategic capital priorities
  - Investment programs and paradigms

- Sustainability Assessment
  - Update on MBTA environmental progress
  - Identification of future actions
What We’re Up To

Staff and Work Area Development

• Capital program planning brought under Policy and Strategic Planning
  • New Capital Strategy team
  • Expanded discretionary grant team

• New staff
  • Senior Director of Climate Policy and Planning
  • Deputy Directors for Regional Projects and Strategic Planning

Work Products

• Capital Needs Assessment Inventory
• MBTA FYs 2025-29 CIP
Critical Planning is Going on Right Now

- Governor’s Transportation Funding Task Force
- Program for Mass Transportation
  - Strategic plan for how the MBTA can meet the region’s needs
- MassDOT statewide long-range plan. Out for public comment!
Building Lasting Partnerships

What We Can Offer

• Guide to how the MBTA thinks, makes decisions, and confronts tradeoffs

• Help navigating the MBTA

• Coordination and collaboration on shared needs and identification of tensions and conflicts

How We Can Work Together

• Build lasting relationships

• Share needs, values, goals, and ways of approaching issues

• What do you want to hear about?

• Ongoing conversations on topics of interest
Thank You!

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Appendix and Reference Slides
Protecting Our Operations, Improving Your Infrastructure

- Resilience requires local knowledge
- MBTA seeks to work with local and regional officials to identify resilience challenges and set action agendas before a crisis
- MBTA Strategic Planning can help understand your needs and concerns for the long run

https://twitter.com/MBTA/status/1704163935769776235
Strategic Planning Framework and Steps

1. Set the vision and goals
2. Develop metrics to track progress
3. Align (and build) the team to achieve initial actions
4. Understand the baseline and conduct gap analysis
5. Engage stakeholders in strategy and action planning
6. Assemble the resources and implement goals

We are here
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
Next Steps for the FY25-29 CIP

April

11th: MBTA’s Finance and Audit Subcommittee: Presentation on proposed FY25-29 CIP
Boston MPO: Presentation on proposed FY25-29 CIP

25th: MBTA’s Full Board: Presentation on proposed FY25-29 CIP

Public comment period begins, and the CIP Book and project list are posted online

May

2nd: CIP Public Meeting #1 (in-person, subject to change)

7th: CIP Public Meeting #2 (virtual, subject to change)

16th: Public comment period ends

June

6th: Finance and Audit Subcommittee: Presentation of final FY25-29 CIP (subject to change)

13th: MBTA Full Board: Presentation on final FY25-29 CIP and release of final plan (subject to change)

July

High-level responses to public comments published on mbta.com/cip with final CIP document

CIP 21-day public comment period
make this the second bullet since the MPO happens earlier

add "subject to approval"

11th?

I removed that entry

Add May 7th virtual meeting

Good flag, thanks!