



Strategic Plan

Mission, Vision & Values

Metra Board of Directors

June 8, 2012

Presented by Lynnette Ciavarella

Senior Division Director, Strategic Capital Planning

and David Kralik

Department Head, Long Range Planning

Meeting Agenda

1. Process / Schedule (5 min)
2. What are Mission, Vision, and Values (5 min)
3. Values – keypad polling (20 min)
4. Mission Statement (15 min)
5. Vision Statement (15 min)
6. Strengths, Weaknesses, Opportunities, & Threats (SWOT) Analysis (30 min)
7. Revisit Mission & Vision Statements (10 min)
8. Next Steps (5 min)

What is a Mission Statement?

- It describes the overall purpose of the organization:
 - Who we are and what we do
 - Who do we do it for
 - How and why we do it
- Starting point in developing a strategic vision

Mission Statements – Metra's Peers

- **Massachusetts Bay Transportation Authority (MBTA)**

Boston, MA

- The MBTA is a dedicated world class transit system built upon customer service excellence, accessibility, reliability, state-of-the-art technology, and a diverse workforce that reflects our commitment to the communities we serve.

- **Metrolink**

Los Angeles, CA

- Metrolink is the premier regional rail system, including commuter and other passenger services, linking communities to employment and activity centers. Metrolink provides reliable transportation and mobility for the region, leading to more livable communities.

Mission Statements – Metra's Peers

- **Metropolitan Transportation Authority (LIRR & Metro-North)**

New York Region

- The MTA preserves and enhances the quality of life and economic health of the region we serve through the cost-efficient provision of safe, on-time, reliable and clean transportation services.

- **New Jersey Transit (NJT)**

State of New Jersey

- Our mission is to provide safe, reliable, convenient and cost-effective transit services with a skilled team of employees, dedicated to our customers' needs and committed to excellence.

- **Southeastern Pennsylvania Transportation Authority (SEPTA)**

Philadelphia, PA

- Our employees are dedicated to delivering safe, courteous, convenient and dependable public transit services for the people of our region. We contribute to the region's economic vitality, sustainability and enhanced quality of life.

Metra's "Goals"

Source: Metra 2011 Program & Budget Book

- Maintain financial stability through cost containment and revenue enhancement.
- Continue aggressive pursuit of an equitable share of federal, state and local funding.
- Maintain safety, reliability and quality of services and facilities, and promote these attributes in order to expand Metra's share of both traditional and new transit markets.
- Improve efficiency and cost effectiveness of operations and services; deploy available capacity in a way to increase ridership levels while minimizing the need to expand fleet size.
- Promote development of a regional rail network that responds to the realities of metropolitan growth and improves the mobility of all citizens in the region.
- Actively pursue opportunities to use commuter rail to support environmental quality and rational, efficient land use and development.

What is a Vision Statement?

- Reflects the agency's mission and values.
- Describes an ideal future.
- What impact does the agency want to have on society?

Sample

SEPTA's vision is to be the region's premier choice for transportation. We will earn that choice through:

- Connecting the region for integrated mobility.
- Sustaining our environment and preserving our system for future generations
- Committing to continuous improvement and innovation.
- Providing excellent service by a team of dedicated employees.

Values

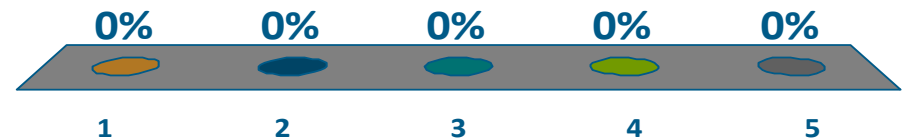
- What are Values?
 - Words or phrases that describe how the agency carries out its mission
 - The core ideology of the agency, they don't change over time
 - Values the agency has currently, not ones in the future

Metra's Values?

- Safety
 - Security
 - High Quality Service
 - Reliability
 - Ridership Growth
 - Stewards of the Public Trust
 - Transparency
 - Environmental Sustainability
 - Communication/ Customer Focus
 - Diversity
 - Fiscal Responsibility
 - New Technology
 - Efficiency
 - Mobility
 - Secure Employment
 - Maintain Ethical Standards
 - Retain High Quality Employees
 - State of Good Repair
- Others:
- A:
 - B:
 - C:
 - D:

Test: Is summer the best season?

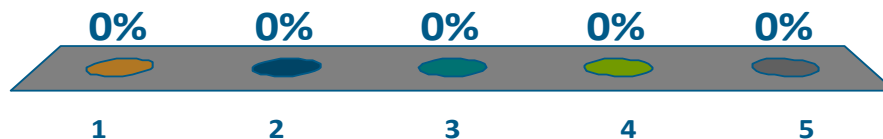
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Is this a Metra value today?

Safety

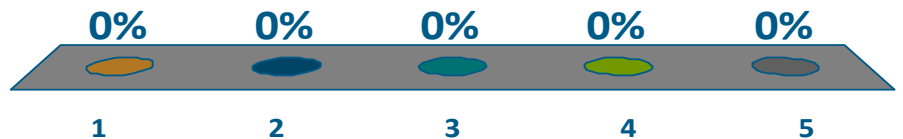
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Security

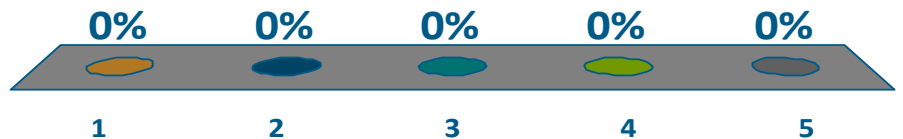
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High Quality Service

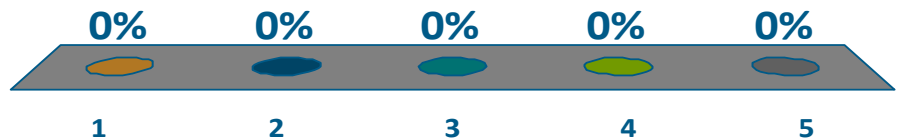
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Reliability

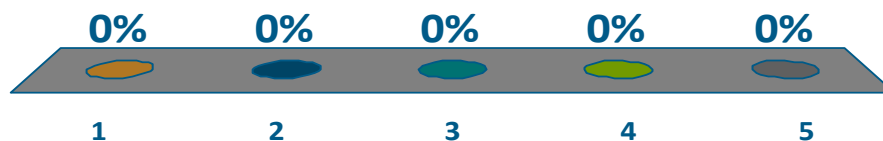
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Ridership Growth

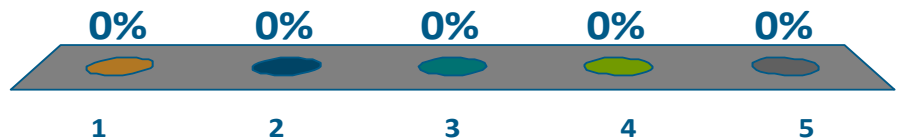
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Stewards of the Public Trust

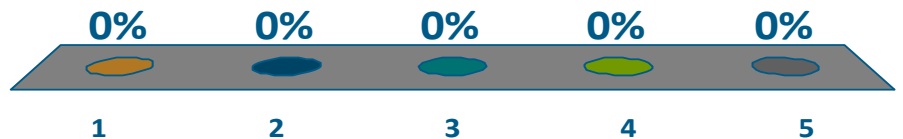
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Transparency

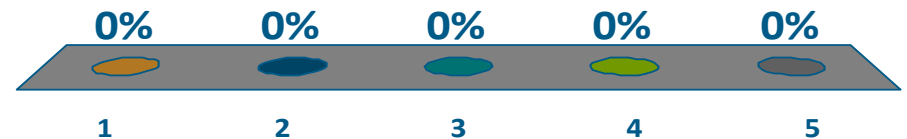
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Environmental Sustainability

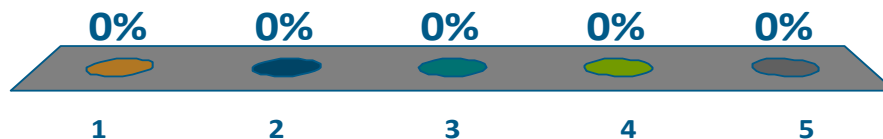
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Communication/Customer Focus

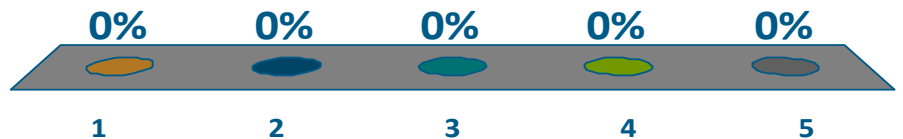
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Diversity

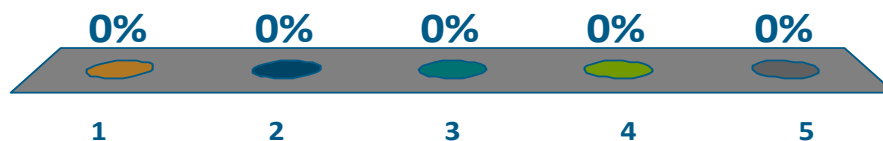
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Fiscal Responsibility

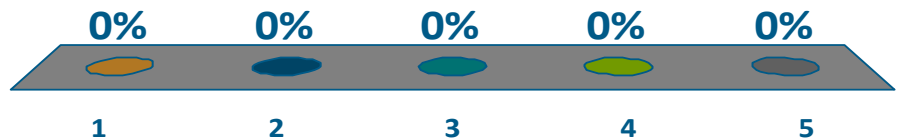
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New Technology

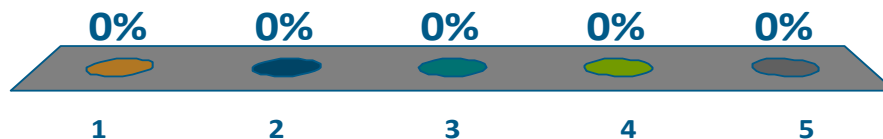
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Efficiency

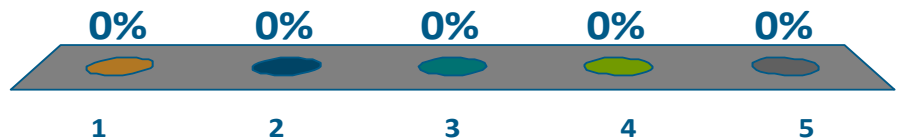
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Mobility

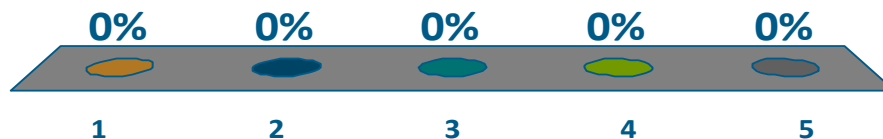
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Is this a Metra value today?

Secure Employment for the Region

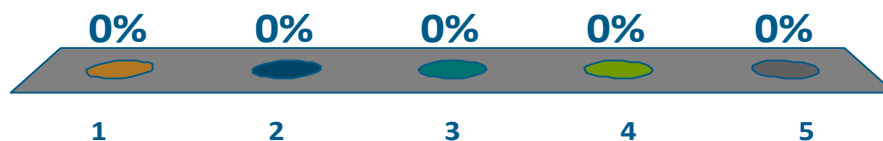
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Maintaining Ethical Standards

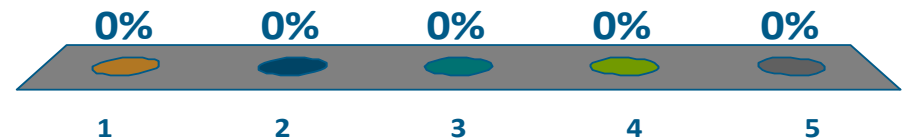
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Is this a Metra value today?

Retain High Quality Employees

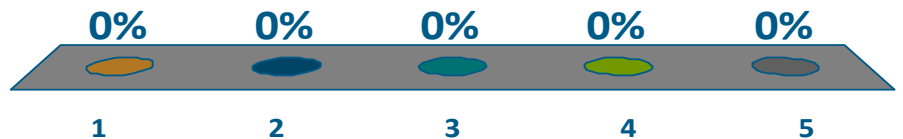
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State of Good Repair

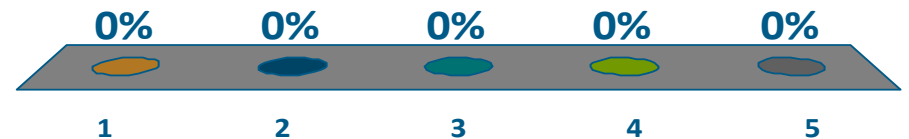
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Is this a Metra value today?

A

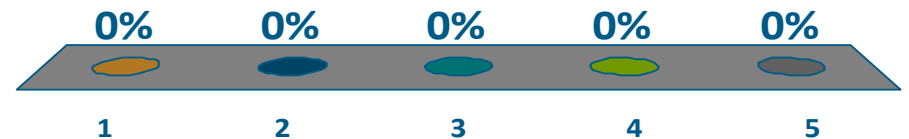
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B

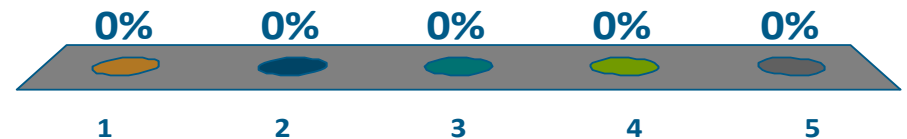
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C

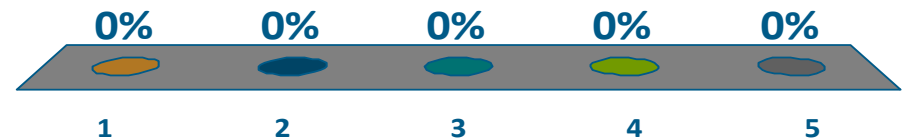
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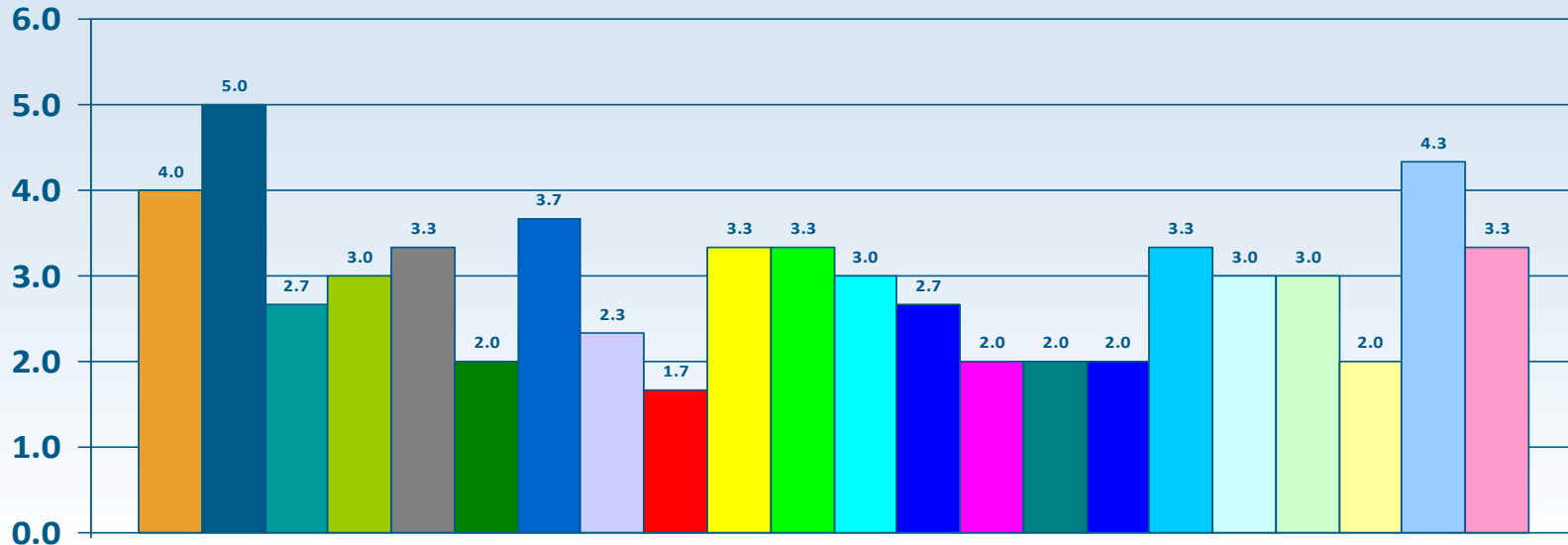
Is this a Metra value today?

D

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Are these Metra's values today?



Highest Scoring Values Identified by SLT

- Safety
- Reliability
- Security
- Retain High Quality Employees
- Communication/Customer Focus

RTA Customer Satisfaction Survey

- Key performance measure required by RTA Act
- Measure adopted by RTA Board
- Previously no regional assessment
 - Surveys conducted at different times
 - Different attributes evaluated
 - Different rating scales
- Survey implementation in 2011
 - Metra & CTA – Fall 2011
 - Pace – Spring 2011
- High overall regional satisfaction
 - 83% satisfied with CTA, Metra, & Pace service
 - 91% would recommend to others

Satisfaction Rankings of 23 Different Attributes

Metra's Top 5 Attributes

- How safely the train/bus is operated
- Personal safety on train/bus
- Personal safety at boarding station/stop
- Availability of schedule & route information
- On-board personnel knowledge of system to assist passengers

Metra's Bottom 5 Attributes

- Number of scheduled trains/buses in non-rush hour
- Notification of service changes
- On-board communications during service delays
- Announcements regarding delays at station/stop
- Cleanliness of train/bus interior

Metra's Key Drivers of Overall Satisfaction

More Important, More Satisfied

- Getting to destination on time
- How safely the train is operated
- On-board personnel courtesy
- Availability of seats on train

More Important, Less Satisfied

- Total travel time
- Cleanliness onboard train
- On-board communications during service delays
- Comfortable temperature on-board train

DRAFT Metra Mission Statement - A

Our values help determine how we carry out our mission.

Metra is the premier commuter rail agency dedicated to providing safe, reliable, efficient, high quality service with a diverse team of skilled employees who are committed to our customers' needs.

Other Ideas/Phrases?

DRAFT Metra Mission Statement - B

Our values help determine how we carry out our mission.

Metra provides safe, reliable, efficient, high quality commuter rail service with a diverse team of skilled employees who are committed to our customers' needs.

Other Ideas/Phrases?

Vision Statements

- Reflect the agency's mission and values.
- Describes an ideal future.
- What impact do we want to have on society?

DRAFT Metra Vision Statement

To be a world-class commuter rail agency linking communities throughout the region by

- *Providing the safest, most efficient, and most reliable service to our customers*
- *Sustaining our infrastructure for future generations*
- *Leading the industry in achieving continuous improvement, innovation and transparency*
- *Facilitating economic vitality throughout Northeast Illinois*

Other Ideas/Phrases?

SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Strengths

What do we do well? What unique resources can we draw on? Internal in origin.

- Excellent safety record and on-time performance
- Extensive existing infrastructure, long-standing partnerships with freight railroads, and complementary land use in many station areas.
- Customers have a high opinion of our service.
- Dedicated and skilled employees
- Metra owns and controls several of our rail lines maximizing flexibility, efficiency and cost-effectiveness
- Standardized equipment and service as well as a consistent brand across all Metra lines
- Regional service area
- Well maintained track and signal system
- Fare price is a good value

Weaknesses

What could we improve? Where do we have fewer resources than others? Internal in origin.

- As a public agency, Metra is dependent on often-unpredictable outside sources for capital funding and operation and maintenance subsidies
- Many Metra lines are owned and/or operated/dispatched by freight railroads creating operational challenges
- Aging equipment and infrastructure coming to the end of its life cycle at the same time (State of Good Repair needs of \$7 billion over next 10 years)
- High capital and operating/maintenance costs
- Historically slow to integrate proven technologies into our administrative processes
- Lack of employee training due to budgetary constraints

Opportunities

What opportunities are open to us? What trends could we take advantage of? How can you turn our strengths into opportunities? External in origin.

- Emerging travel markets (resolving last mile without increasing rider subsidy – reverse commute, off-peak/weekend, customers attracted by high gas prices, etc.)
- Growing interest in environmental sustainability, walkable communities, and car-free or 1-car lifestyles has increased demand for housing and employment in Metra station areas, which helps attract new riders.
- Emerging technology platforms provide capabilities to quickly test, learn, and implement new technology driven business processes
- Increase income from non-fare revenue streams, such as advertising, rental income, trackage rights agreements, and non-traditional grant sources
- Promote association of environmental friendliness with public transportation
- Improve energy efficiencies to cut costs
- Leverage public support for funding
- Encourage economic development around stations including increasing employment in the Chicago CBD

Threats

What threats could harm us? What is our competition doing? What threats do our weaknesses expose you to? External in origin.

- Uncertainty associated with funding and potential for unfunded mandates
- Freight railroad mergers and consolidations and projected future increases in freight and intercity passenger traffic
- Shift of jobs from Chicago to suburbs, where Metra service is not a viable option for most work trips
- Uncertainty and likelihood of rising costs from electricity and diesel fuel, insurance, and homeland security, and additional regulation (including unfunded mandates)
- Economic uncertainty
- Changes in commuting patterns related to flexible work rules and telecommuting
- Staff attrition and the loss of institutional knowledge

Next Steps

- Situational Analyses - ongoing
- First round of outreach to the Public, Citizen's Advisory Board (CAB), and Stakeholders in July
- Continued dialogue with Board, Metra Senior Leadership, CAB, Stakeholders, and Public throughout the year

The logo for Metra, featuring the word "Metra" in a bold, blue, italicized sans-serif font. The letter "M" is significantly larger than the other letters. A thick blue horizontal line is positioned below the letters "e", "t", and "r", extending from the left edge of the "M" to the right edge of the "a".

Metra