Metra provides safe, reliable, efficient, and affordable commuter rail service that enhances the economic and environmental health of Northeast Illinois.
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LETTER
FROM THE CEO AND BOARD CHAIR

The current public transportation landscape is unprecedented and Metra service must be ready to confront this new environment.

Much has changed since Metra adopted our last strategic plan, On Track to Excellence, in November 2017. The COVID-19 pandemic has had lasting impacts on employment trends and transit usage. New federal and state funding sources provided some immediate relief to our operational and capital needs. However, the next five years promise to be challenging as we adjust to the “new normal.” Metra will need to make data-driven decisions to develop schedules and fare programs that address the evolving needs of our community and encourage ridership towards pre-pandemic levels. Federal COVID relief funds are projected to be exhausted in 2025; Metra must consider longer-term solutions. Therefore, it is important to carefully consider the direction our organization will take over the next five-year strategic planning horizon.

Concurrently, our agency is dedicated to addressing equity and climate change. This plan is an opportunity for us to recommit ourselves to a diverse workforce, to fairness in contracting, and to serve all our customers fairly and equitably. We recognize the need and our responsibility to reduce our carbon footprint to improve regional air quality and the health of citizens.

We look forward to continuing to welcome our riders back by providing service that meets their travel needs in a convenient and reliable manner. We know we need to continue to rebuild service during these next five years, but more importantly, to reimagine our service as it fits into the new employment paradigm. Our plan isn’t simply to return to what we had in 2019, but to adapt and adjust our service to the meet the interests of the citizens of northeast Illinois and uphold our essential role in the region’s economy.
Metra is the commuter rail system serving the six-county Chicago metropolitan region, an area that covers more than 3,700 square miles. The system has 11 rail lines and 242 stations, including 77 stations within the city of Chicago and 165 stations in 121 other communities. It is the largest commuter railroad in the United States based on miles of track, with 488 route miles and nearly 1,200 miles of track. Prior to the onset of the COVID-19 pandemic, Metra provided an average of 281,000 passenger trips each weekday and 93,000 passenger trips each weekend, making it the busiest commuter rail system in the United States outside of New York City. In 2022, Metra provided about 100,000 passenger trips each weekday and about 70,000 passenger trips each weekend.

Chicago has historically been one of the nation’s major rail hubs, for both freight and passenger services. It is the only place in the country where six of the nation’s seven major Class I railroads operate large terminals. This concentration of rail infrastructure has created a complex operating environment, in which Metra must coordinate train movements and infrastructure improvements with numerous partners. Despite these challenges, Metra consistently maintains an on-time performance rate of about 95%. When compared to our industry peers, Metra ranks second for operating costs per passenger trip and first for passenger trips per vehicle revenue hour (RTA Peer Performance Measurement Report, February 2019).

Metra directly owns and operates four rail lines (Rock Island, Metra Electric, Milwaukee District North and Milwaukee District West). Three lines are operated by Metra employees over freight-owned lines through trackage rights or lease agreements (Heritage Corridor, North Central Service and SouthWest Service). Four lines are operated directly by freight railroads through purchase-of-service agreements (BNSF, Union Pacific North, Union Pacific Northwest and Union Pacific West lines).
Our operating funds come from a combination of regional sales taxes, public funding from the state of Illinois, and fare revenue. Before the pandemic, this funding model was relatively stable. However, Metra is now facing a looming operating funding crisis that resulted, in part, from the acceleration of new travel demand patterns brought on by the pandemic. Metra received nearly $1.1 billion in federal operating funding relief to cover fare revenue losses due to the COVID-19 global pandemic. Metra used $292.9 million in 2020 and 2021 and budgeted $255.9 million for 2022, leaving about $527.5 million for future years. Under current projections, that relief funding will last into 2025. Metra's budgets have been aided by increased sales tax revenues, which contribute to transit funding and have been outpacing forecasts. Sales taxes plummeted in early 2020 but rebounded quickly as consumer spending recovered and were enhanced by the taxing of online purchases, which Illinois began in 2018 and expanded in 2020 to include out-of-state online purchases. However, beginning in 2025, Metra will likely encounter a budget gap in operations funding.

Operating funding relief has also come from Illinois lifting the requirement for Metra and other transit agencies to cover roughly 50% of their operating expenses with system-generated revenue (mostly fares). This legislation is set to expire at the end of 2023.

Despite these funding solutions, capital and operating funding will be an ongoing challenge over the next five years. Moreover, our operating environment has become even more complex, and there are new challenges due to the pandemic, which has changed lives and could change the way people use public transit for generations. This update provides a roadmap for the next five years so Metra can address the following challenges and continue to provide effective transit for the residents who depend on our service:

**Challenges Facing Metra**

Five years have passed since Metra adopted On Track to Excellence in 2017. Focusing on capital and operating shortfalls, our last plan called on Springfield and Washington to provide more funding, especially capital funding, or we would be forced to watch our capital assets fall further into a state of disrepair. It also acknowledged our need to operate a reliable service despite our interface with freight railroads and other passenger rail operators in the most complex rail hub in North America.

Since the adoption of On Track to Excellence, our call for more capital funding was answered in the short term. In June 2019, Springfield approved Rebuild Illinois, a $45 billion capital program, the first for the state in nearly a decade. This provides Metra a stable source of annual revenue, known as “PAYGO,” funded by an increase in the motor fuel tax, as well as an additional $2.7 billion in bonding for transit capital projects through 2024. This allowed Metra to make important improvements throughout our system as shown in the photo and conceptual renderings to the right. Additional projects funded by the state bond program and PAYGO include cybersecurity upgrades, new crew facilities, and the purchase of new ticket vending machines, among others.

Similarly, Congress passed the $2.1 trillion Infrastructure Investment and Jobs Act (IIJA), the next five-year transportation authorization bill, in 2021. Through 2026, IIJA provides $107 billion for public transit, an increase of 63% over previous levels. That includes $1.3 billion in additional transit funding for the Chicago region, and new transit discretionary grant opportunities.
Adapting to new ridership patterns and changing rider behavior:
This will be one of the top challenges in the years ahead. Even before the pandemic, we started to see the impact of flexible and remote work in the region. Year over year, weekday ridership patterns reflected more variability in employee start times downtown as the AM peak period began to flatten. In customer surveys, more riders said they had the ability to work remotely and were doing so at least once per week. As COVID-19 came and stay-at home orders were enacted, our ridership fell by 97%. Those who were able shifted to full-time remote work, and recreational travel became nearly nonexistent. Metra responded by operating trains on adjusted schedules for essential workers who still needed us. We also adopted service principles that guided our schedules as riders returned, and that we are also using for new schedules moving forward.

At the adoption of this plan, Metra ridership is building back. Systemwide, we are currently at about 40% of pre-pandemic ridership on weekdays, and 60% on weekends. The resiliency of the weekend ridership market demonstrates one of the most salient ridership trends coming out of the pandemic: people are ready to return to public transit and need service options for non-work trips. In addition, a significant portion of our weekday ridership is only using Metra two or three days per week or less. Responding to these new ridership patterns and attracting new customers will determine the success of Metra and this plan. We must identify ways to provide service that meets all travel needs.

Operating funding:
Metra faces operating funding instability. Our federal COVID-relief funding is projected to run out in 2025, and the legislation lifting the fare recovery requirement will expire at the end of 2023. In addition, it is uncertain whether sales taxes will remain strong. At the same time, Metra is forecasting systemwide ridership to only return to 70% of pre-pandemic levels by the end of 2025, and even this is uncertain. While our operating funding situation was relatively stable before the pandemic, without permanent relief from the farebox recovery requirements and a new operating funding stream, Metra will not be able to provide the service options needed to address new rider patterns and demands in a post-COVID environment.

Capital funding:
Despite the recent influx of much-needed capital funding, Metra will still need to pursue new grant opportunities and deliver projects on time and on budget. We have a responsibility to spend our limited funding efficiently and pursue additional funding while still meeting the transportation needs of the region.

Addressing equity:
The COVID-19 pandemic showed the importance of public transit in addressing equity. While many of the region’s workers seamlessly shifted to remote offices, just as many essential workers – disproportionately women, minority, and low-income – have relied on public transit. Over the next five years, addressing the travel needs of the region through a racial and socioeconomic equity lens is needed, and Metra must prioritize this in service provision and capital programming.
Attracting and retaining employees amid regional workforce changes:
Metra’s people are our most important asset – without our highly skilled workers in the field, on our trains, and in professional positions, Metra could not provide service to residents who rely on us daily. Coming out of the pandemic, Metra, like other transit agencies nationwide, has struggled to attract and retain employees. Potential and current employees have higher expectations about benefits and employee policies with the ubiquity of remote and flexible work. Positions that go unfilled may result in service disruptions and limit our ability to provide additional service moving forward. We must ensure our salaries, benefits packages, and policies are competitive and meet the needs of our people in order to attract a talented workforce, remain an employer of choice, and continue delivering a high-quality service for customers.

Combating climate change:
The need to address climate change has become ever more apparent in recent years. Vehicle emissions are the number one generator of greenhouse gas emissions contributing to climate change. Public transit has an inherent advantage in curbing the effects of climate change by removing single-occupancy vehicles from the roads. Metra will need to provide service that competes with driving time and the overall ease and convenience of driving to further encourage a shift away from private vehicles. However, it is not enough to just promote mode-shift; Metra must also reduce our fleet’s reliance on fossil fuels, reduce our fleet’s greenhouse gas emissions, and utilize more energy-efficient facilities and support vehicles.

Operating in a complex environment:
Freight interference is routinely a top cause of delay for Metra trains and working with our freight partners to minimize these delays will be an ongoing effort. Furthermore, mergers and acquisitions among freight railroads and increased demand for Amtrak intercity service could add more train traffic to our already-crowded corridors. If opportunities arise for Metra to increase control over those corridors, we will pursue these as appropriate.
Despite our challenges, Metra provides safe, reliable, and vital public transportation for economically, racially, and ability-diverse communities. An interconnected transportation system allows residents of the region to maintain a high quality of life with access to employment and choice of home and work locations. The value of a comprehensive railroad system to the six-county area includes:

- **Connecting people to places of employment, education, recreation, and other destinations.** Metra’s schedules have traditionally focused on the suburb-to-downtown work commute, and in 2019, 92% of trips on the system were work-related. However, coming out of COVID, weekend and off-peak trains are becoming an increasingly important choice for travel to entertainment, recreation, cultural destinations, and other transit modes.

- **Providing an alternative option to driving.** Metra provides a reliable and affordable transportation option for those who choose to live a “car-light” lifestyle, or who are without access to a vehicle, or who cannot drive due to age or physical limitations. In Cook County, 17.7% of households do not have access to a car. (Source: United States Census, 2020 Community Survey)

- **Contributing to sustainable land use development.** Many suburban communities have recognized that a Metra station in their downtown is an asset and have attracted transit-oriented developments (TODs). TODs increase downtown densities, support economic development, reduce vehicle trips, and facilitate walking and biking.
METRA’S VALUE TO THE REGION

- **Reducing the region’s greenhouse gas emissions.** According to the U.S. Environmental Protection Agency, transportation emissions are the greatest contributor to the greenhouse gases driving climate change. By removing cars from roadways, Metra reduces the carbon footprint of our riders and region.

- **Saving riders time and money.** By using Metra and avoiding congested roads, many commuters have reduced travel times and/or are able to use their commuting time more efficiently. Pre-pandemic, it was estimated Metra service saved riders 18,000 hours of commute time each morning, about 15 minutes per rider. Metra riders also save on the costs associated with owning and operating a car, such as fuel, maintenance, and parking. According to AAA, the average cost to own and maintain a new car is nearly $900 per month - which is nearly nine times the cost of a Monthly Pass for travel between fare zones A and E ($100).

- **Attracting businesses to the region.** Metra connects a qualified and diverse workforce to the Chicago central business district and to suburban employment centers, thereby fueling the region's economic engine. Access to a comprehensive public transportation system, which includes Metra, attracts businesses to northeast Illinois; there are 35 Fortune 500 companies with headquarters in the region, the second-highest concentration of any metropolitan region in the country.

- **Driving the regional economy through employment.** Metra employs more than 4,500 people directly and through agreements with freight carriers. In addition, Metra estimates that our 2022-2026 capital program will create an additional 75,000 construction jobs.

- **Benefitting non-riders through reduced traffic congestion.** Not only does Metra save time for riders, but pre-pandemic, it was estimated Metra saves the region as a whole about one million hours of commute time each morning by reducing roadway congestion. If there were no Metra service, local expressways would need to increase capacity with 27 additional traffic lanes to accommodate the approximately 73,000 peak-hour Metra users.
This new strategic plan covers our next five years, 2023-2027: a post-COVID-19 environment in which travel patterns have been altered. Metra needs to adapt to these changing travel patterns in order to attract new users and welcome back traditional riders.

To address new and persistent challenges and build on Metra’s essential value to the region and past successes, Metra has adopted a new mission and vision and five new strategic goals. In developing these components, we have considered input from the public through a survey that garnered more than 2,800 responses and with virtual and in-person public meetings. We also held key stakeholder meetings with our regional transportation planning partners and with transportation advocacy groups. The input and support we received from the public and our partner agencies and groups were valuable elements of the update process, and we thank everyone for their time, effort, and contributions.

Additionally, our mission, vision, and goals align with the planning efforts of our regional partners. Some of the plans that provided guidance and direction are illustrated on this page.
MISSION

When Metra first began the strategic planning process for *On Track to Excellence* in 2012, the first step was to annunciate our purpose through a Mission Statement. Through this strategic plan update process and with input from the public and our stakeholders, Metra has refined that Mission Statement to make it more succinct and impactful. The following is the new statement:

*Metra provides safe, reliable, efficient, and affordable commuter rail service that enhances the economic and environmental health of Northeast Illinois.*

VISION

While a Mission Statement asserts what Metra currently does, a Vision Statement defines our future direction. Since our last plan, the pandemic has upended Metra’s traditional core market of riders traveling between home and downtown offices. Nearly three years after the onset of the pandemic, some riders have returned for work trips. However, we’re also seeing an increase in recreational travel on the weekends and outside the traditional AM and PM peak periods on weekdays.

Metra is still committed to peak period service for downtown work trips, but we must also adapt to changes in rider behavior and demand. We plan to do this by moving toward a “regional rail” service model. Metra will provide service at more frequent intervals throughout the day for all trip types, and we will also explore targeted opportunities within the region to serve new, underserved ridership markets and destinations.

This evolution of our service model will allow more trips to be taken by transit, thereby reducing greenhouse gas emissions and contributing to the sustainability of our region and our fight against climate change. The following vision statement will guide Metra’s work for the next five years:

*To proactively address evolving transportation needs, Metra will provide regional rail service that supports sustainable connected communities.*
Through this new mission and vision, the 2023-2027 Metra Strategic Plan supports and strengthens the My Metra philosophy and our agency’s core values. My Metra is taking personal responsibility for our riders and each other. The My Metra goal is to imbue each employee with a common bond of service, duty, and opportunity that guides our decision-making. My Metra communicates that we are part of the community, bringing people together, providing safe and efficient service, and contributing to the region’s economic growth and opportunity.

We also acknowledge that Metra contributes to the economic and environmental health of the region by providing safe and efficient service to our riders so they can work, live, and access services, education, and entertainment. We continue to seek ways to better serve our public and respond to their evolving needs, while also responding to the greater need for equitable service and environmentally friendly operations. Metra has adopted the following values to drive everything we do:

The Mission and Vision Statements are designed to guide our decision-making in the next five years. To fulfill our mission and move toward our vision, this strategic plan is built around the following five core goals:

- Enhance service to grow ridership and provide mobility choices
- Ensure the Metra experience is safe, easy, and enjoyable for all our customers
- Attract a diverse workforce and invest in our employees
- Innovate to become more efficient and effective
- Be a socially responsible organization committed to equity and sustainability

The goals and objectives in this plan reflect the evolving priorities of Metra, regional transit needs, and the voices of our customers. To achieve our vision, we must understand that our five strategic goals are equally important and interrelated. Within this document, we will identify specific initiatives under each of these goals and measures of success to gauge our achievements.

The goals and objectives in this plan reflect the evolving priorities of Metra, regional transit needs, and the voices of our customers.
ENHANCE SERVICE TO GROW RIDERSHIP AND PROVIDE MOBILITY CHOICES

With changing rider behavior and demand due to the pandemic, Metra will proactively move toward a regional rail service model to meet evolving transportation needs. Our service will be available at more frequent intervals throughout the day and be a choice for all trips. We will also explore pragmatic opportunities for new service options within the region. Providing more service options will help attract new riders outside our traditional commuter market and grow our ridership.

Throughout the pandemic, Metra adapted quickly to ridership trends. To guide schedule development as riders returned, we developed the following service principles with the understanding that pre-pandemic schedules would not meet post-pandemic needs.

Metra Service Principles

- Provide consistent and frequent service throughout the day
- Establish easily understandable schedules with memorable service patterns
- Include new express service when possible
- Consider transfers both within Metra and to/from other transit services
- Explore reverse-commute and new ridership markets
- Promote regional equity

We also introduced new fare products to better suit riders' needs. In the summer of 2020, we piloted a new $10 All-Day Pass. Customers who formerly purchased 10-Ride Tickets or Monthly Passes switched to this Day Pass for traveling a few times per month and for recreational travel. As more riders returned for weekend trips, we launched a new Saturday or Sunday Day Pass in 2021 for unlimited travel on Saturday or Sunday for $7, a better value than Metra’s lowest round-trip fare. We also introduced the $6 Day Pass for up to three zones of travel in early 2022. Lastly, we launched the $100 flat-rate “Super Saver” Monthly Pass in mid-2022 to provide riders with an alternative to driving and rising gas prices. At the same time, the CTA and Pace unveiled the $30 Regional Connect Pass to give Metra Monthly Pass holders unlimited rides on any of the Chicago-area transit services for $130.

In addition, in 2021 we entered into a three-year partnership with Cook County and Pace for the Fair Transit South Cook Pilot. Advancing equity in the region, this program reduces fares by up to 50% on the Metra Electric and Rock Island lines for all tickets to benefit lower-income riders on the South Side of Chicago and in the south suburbs. Throughout the pandemic, the Rock Island and Metra Electric outperformed most other lines in our system in terms of ridership recovery.

We’ll continue these and other efforts under the following objectives to achieve this goal. However, it should be noted that Metra is constrained by its operating costs and operating environment. We will do everything we can to pursue more operating funding and the cooperation of the freight railroads that own and/or use some of our 11 lines in order to explore new service options. As a result of these constraints, our move toward regional rail may look different on each of our lines.

OBJECTIVES

- Provide better service options for off-peak, reverse commute, and intermediate trips. Providing more service options outside the traditional peak periods is a top objective. Having trains arrive at stations throughout the day at regular, frequent intervals - on both weekdays and weekends - will ensure Metra is a competitive option and residents will choose our service for all types of trips.

- Continue to modify schedules guided by our service principles. Our service principles will drive schedule and service changes. We will create a few types of train patterns on each line and create zone-like services where possible. We have already begun exploring some of these schedule
changes and have seen success. For example, on the UP-N Line, where we have implemented 30-to-60-minute headways between Winnetka (Zone D) and downtown Chicago (Zone A) throughout the day, we have seen greater ridership recovery than on most other lines. In developing new schedules, we will also consider CTA, Pace, and private shuttle services to allow transfers.

- **Continue exploring ways to simplify our fare zone structure and incentivize other rider markets.** We have seen the successes of offering new, low-cost, and simplified fare products, such as Day Passes, and reduced fares on the Metra Electric and Rock Island lines. We’ll continue these efforts to make the Metra fare system easy to understand and affordable to attract new riders and welcome back longtime users.

- **Explore new service and expansion opportunities.** We’ll continue to analyze new destinations that Metra could serve through infill stations, line connections, and new partnerships.

- **Emphasize equity in decision-making related to service.** Where feasible, meeting the transportation needs of the region’s transit dependent, minority, and low-income residents will be a priority for Metra over the next five years. We’ll continue to participate in the Fair Transit South Cook Pilot and identify other partnerships and service options to advance service equity.

### MEASURING OUR SUCCESS:

- Systemwide ridership and ridership by markets
- Implementation of new schedules
- Percent of ridership using different fare products
- Demographics of ridership
ENSURE THE METRA EXPERIENCE IS SAFE, EASY, AND ENJOYABLE FOR ALL CUSTOMERS

To remain a competitive transportation option and attract new customers, Metra must ensure that our service is as safe as possible, easy and intuitive to use, and enjoyable for everyone, regardless of ability, age, socioeconomic status, or language spoken.

Since the adoption of On Track to Excellence, Metra completed the installation of Positive Train Control (PTC), the largest safety initiative for the railroad industry to date. Through GPS-technology, PTC enforces track speeds and prevents train-to-train collisions and derailments. We have increased funding for Metra Police officers in the field to deter criminal activity on Metra property and to uphold a safe environment on our trains. Metra Police conducted more than 250,000 station checks and 40,000 train rides between 2018-2022.

Additionally, On Track to Excellence identified several initiatives to enhance the rider experience and make riding Metra easy and enjoyable, such as enhancing station and wayfinding signage, providing real-time travel information at stations, and continuing our ongoing station rehabilitation program. Metra will continue these efforts, and undertake new ones that align with the following objectives to help us achieve this goal:

OBJECTIVES

- **Maintain a high level of safety on trains, at stations, and at facilities.** Metra will continue to make the necessary investments to maintain and upgrade PTC. Metra Police will also continue to have a presence on our trains and in the field to ensure safety and security. We will also develop Metra’s first Comprehensive Safety Action Plan to further ensure that the public and our riders and employees are safe.

- **Operate service to meet schedule expectations.** This is the primary way Metra can ensure our system is easy and intuitive to use: trains need to arrive at stations when expected so passengers can truly rely on our service. Our riders tell us that reliability is one of the top reasons why they choose and value Metra. Between 2017-2021, Metra met our 95% on-time performance goal in 47 of the 60 months. We will strive to maintain and exceed our reliability over the next five years. We will also introduce new schedules that will be easy to remember, with trains arriving at regular, memorable intervals throughout the day, further increasing Metra’s reliability for non-work trips.
- **Improve customer communications.** We have begun the process of deploying a new train-tracking and customer communications system. This will provide real-time information across multiple channels, including on board trains and at stations, about upcoming stops, departure times and locations of trains, and service delays. The new system will be introduced systemwide over the next five years. Moreover, we will continue to improve station signage, including the deployment of digital displays with next train information, to ensure the system is easy to navigate and passengers can feel confident using our service. We will also explore new marketing campaigns and outreach efforts to reach new customers and communicate that Metra is a viable transit option for everyone.

- **Continue to improve station areas and facilities, prioritizing system accessibility.** Metra will continue to conduct station evaluations to identify actions that can be taken to improve ridership, rider experience, and revenue generation at stations. Between 2018-2022, Metra completed 22 station rehabilitation projects and made five stations ADA-accessible. ADA access and improving station areas and facilities will remain a top priority over the next five-year period, as 25 stations are programmed for ADA improvements in the 2023-2027 capital program. This will improve the experience for people with disabilities, the elderly, and children. Metra may evaluate parking lot utilization for potential redevelopment.

- **Improve the onboard experience.** Metra will introduce new railcars to our system in 2025, marking the biggest change to our railcar design since the 1950s. We will be able to phase out our oldest railcars, some of which are 70 years old, helping bring the Metra riding experience into the 21st century. The new cars will feature near-level boarding and wheelchair lifts to improve accessibility, more comfortable seating, an increased number of doors per car to facilitate passenger access and egress, and more rider amenities such as video screens, charging outlets, and cupholders. In addition, Metra will explore new ways to create an engaging and more enjoyable onboard experience and continue to expand the Bike Car Program to promote sustainable transportation and recreation.

**MEASURING OUR SUCCESS:**

- Total passenger & employee injuries
- Number of service delays caused by right-of-way incidents
- Number of months meeting 95% on time performance
- Number of stations rehabilitated & percentage of riders boarding at fully ADA compliant stations
- Implementation of grade-crossing improvements
- Share of survey respondents satisfied with Metra
- Conduct station evaluation studies

- **Monitor and respond to customer feedback.** In July 2021, Metra launched an onboard survey, allowing customers to tell us how we’re doing. In the first year and a half of monitoring responses, 70% of survey respondents are consistently satisfied with Metra. Over the next five years, we’ll continue to listen and respond to our customers via this survey and other rider feedback channels to improve our service and increase our customer satisfaction.

Rendering and photo of exterior ① and interior ② of the new rail cars. Photo of interior of Metra’s bike car ③.
Over the last three years, 3.3% of Metra’s workforce retired, and another 7.1% voluntarily separated, in part, due to the pandemic. While this represents a significant loss of institutional knowledge, incumbent employees have the opportunity for advancement and greater participation in the success of Metra. The future of Metra relies on our ability to attract a diverse, skilled workforce, and on the investment in our employees as they continually develop their skills.

In 2020, we initiated the *My Metra* campaign to keep all of us connected during the pandemic, strengthen our commitment to each other and the riders we serve, and acknowledge all our contributions in providing quality service to riders. Continuing the *My Metra* campaign is a key initiative. Other objectives that will help us achieve this goal include:

**OBJECTIVES**

- **Advance equity, diversity, and inclusion initiatives in hiring.** Metra values a diverse workforce, and we will continue to implement our Equal Opportunity Employer Plan and its affirmative action components. We will continue to diversify our applicant pool and recruit for our positions in diverse areas of the region by working with industry organizations, distributing our job postings to more than 15,000 community-based groups, advertising jobs at local colleges and universities, and conducting outreach to Chicago Public Schools as invited. We will also continue our internship program for college students and our program to directly-hire high performing interns for full-time positions.

- **Foster a collaborative and inclusive work environment.** This is one of the top ways we can invest in our employees and make Metra an employer of choice for potential candidates. In 2021, Metra began to implement a formal Diversity, Equity, and Inclusion (DEI) Program. Our DEI program includes a comprehensive organizational assessment, agencywide training, leadership accountabilities, internal/external communication plans, and a methodology to monitor results. Metra is committed to advance racial equity in our organization through our DEI framework, and to further this, we’ll also be participating in the American Public Transportation Association’s (APTA) Racial Equity Pilot Program to test our existing policies, programs, and practices to ensure racial equity. We’ll ultimately hold leadership accountable for our equity strategy and DEI results by linking pay increases to our performance in these areas.

- **Expand and encourage participation in professional development opportunities.** Metra will continue to identify and offer training opportunities for staff at all levels, including for those who wish to take on leadership roles or enhance their managerial competencies. Metra will support participation in professional groups, encourage external educational and professional development opportunities, and continue our tuition reimbursement program so employees can pursue higher education to advance their career goals.

- **Maintain positive relationships with union partners.** Union members perform many vital functions of our maintenance and operations activities. Seventeen unions represent more than 80% of all Metra employees. Metra will continue to invest in our team through constructive union relations.
INNOVATE TO BECOME MORE EFFICIENT AND EFFECTIVE

A legacy system like Metra’s has many aging components approaching or past their useful lives, and reliable rail service depends on the ongoing maintenance and improvement of our capital assets. We must deploy innovative tools and adopt new, data-driven practices to leverage funding sources and improve our system efficiently and effectively.

The pandemic compelled Metra to confront the dual challenges of keeping our riders safe and continuing operations with fewer riders and employees. To assure riders that Metra is a safe and healthy option, Metra launched the innovative “Commute with Confidence” campaign, which won the 2021 APTA Award for Best Marketing and Communications on COVID-19.

Additionally, Metra has implemented numerous initiatives to become more efficient and effective. In 2020, Metra created the Project Management Oversight (PMO) office to help deliver our capital infrastructure improvements and pursue additional funding opportunities. This enabled Metra to standardize and streamline internal administration and monitoring of projects to ensure they are completed on time and on budget.

Metra also develops an annual capital program that prioritizes our most pressing and urgent infrastructure and rolling stock needs. We use our federally mandated Transit Asset Management (TAM) Plan to inventory and assess the condition of our capital assets and identify and prioritize our investment decisions through a data-driven process. We will update our TAM Plan and continue this approach over the next five years.

Metra’s work to improve efficiency and effectiveness is an ongoing process, and the objectives we will undertake to achieve this goal include:

OBJECTIVES

• Work and partner with key stakeholders, other transit agencies, and employers to improve regional connectivity. Metra has tried to improve regional connectivity by coordinating with large employers, such as Amazon in University Park on the Metra Electric Line, to provide train schedules that align with start times of employees and private shuttles making connections to and from our stations. We’ll continue these efforts and others to solve first- and last-mile connection challenges and enhance our system by partnering with our key stakeholders.

• Strategically pursue discretionary grants and alternative funding opportunities. Metra will continue to seek discretionary funds from USDOT, Illinois, and other funding partners. To make our applications more competitive, Metra will ensure that our projects consider new performance-based funding measures and are attractive to our primary funding agencies.

MEASURING OUR SUCCESS:

• Continuation of My Metra campaign
• Improve retention of trade, professional, and management employees
• Evaluate success of workforce diversity goals
• Encourage and increase participation in external/internal professional development programs

• Remain competitive with peer employers. Metra must recognize the competitive nature of the job market, which has put further pressure on our organization to obtain and retain staff. We will continue to analyze our compensation and benefit packages and internal employee policies to ensure we remain competitive.
• **Continue efforts to fully integrate fares with CTA and Pace.** Metra has taken steps toward improving regional connectivity by working with CTA and Pace to facilitate transfers between our services. We will install ticket vending machines at stations systemwide, which will help remove cash payments from trains but also provide an opportunity for fare integration, because the machines could eventually accept Ventra Card payments. Achieving full fare integration will make connections to Metra easier, so we will continue to work to implement universal fares following Metra’s Interagency Fare Policy.

• **Deliver capital projects efficiently through agency realignment.** In 2021, Metra began to reorganize internal departments. One of the main changes of the agency realignment is creating the External Affairs Division. This brings together the PMO, Planning, Programming, and Grants, Project Delivery, and Community Relations departments, which will allow the agency to better plan for system improvements, coordinate the pursuit of grant funding opportunities, and effectively deliver capital projects.

• **Implement cost-savings measures.** Metra’s PMO will identify administrative and project management best practices and efficiencies to improve project implementation and prevent potential cost escalations. Concurrently, Metra will continue to identify and implement changes in operation and maintenance activities that increase efficiencies and cost-savings, such as rehabilitating cars and locomotives with in-house crews rather than contractors.

• **Optimize capital assets.** Metra will continue implementing programs that extend the useful life of assets, such as locomotives and rail cars, until they can be replaced. Our TAM plan will guide us to prioritize which capital assets are most in need of replacement, thus positively impacting our reliability and operations costs.

• **Keep IT infrastructure safe through the implementation of cybersecurity strategies.** In response to an IT vulnerability risk assessment, Metra developed a cybersecurity strategy to enhance the security of our IT network, prevent costly cyberattacks, and systematically improve our IT operations. Metra is compliant with federal mandates concerning cybersecurity, but we are implementing additional security measures, including multifactor authentication, disaster recovery mechanisms, new automated patch management software and hardware, and the replacement of outdated hardware and software.
OBJECTIVES

- **Emphasize equity in capital programming decision-making.** Metra will consider an equitable distribution of projects throughout the region to ensure there are equal benefits in reducing air pollution and supporting workforce and economic development in disadvantaged, low-income, and communities of color. When pertinent, Metra will include community input in the project development process.

- **Reduce our carbon footprint.** Metra is committed to reduce carbon emissions by developing standards and specifications for zero-emission locomotives. In 2022, we released an RFP for zero-emission trainsets that we will pilot on specific corridors throughout our system. Both of these initiatives will replace our oldest, most-polluting vehicles, accelerate our emission reduction efforts, allow for schedule enhancements and efficiencies, and improve our reliability.

  Given our interface and partnership with freight railroads and the costs and logistical challenges that would have to be overcome for the electrification of the Metra system, we have determined that zero-emission locomotives and trainsets are the most reasonable approach to reduce our environmental footprint and advance the sustainability of our system and region. Metra will continue to program funds to develop a green fleet, in addition to finding other ways to be more environmentally-friendly, such as including sustainable design principles in our stations and facilities.

- **Meet or Exceed DBE Contracting Goals.** For the past five years, Metra has met or exceeded federal and non-federal DBE goals. We seek to foster diverse teams of contractors whenever we bid, design and/or construct projects. The Office of Diversity & Business Enterprise promotes equal contracting opportunities and business diversity enterprise participation.

- **Contribute to the development of sustainable communities.** Metra is an active contributor in the development of CMAP’s ON TO 2050 Regional Plan and RTA’s Strategic Plan. Consistent with the goals of these plans, Metra will actively participate in local and regional projects that plan for resilient, sustainable communities, combat climate change, and promote transit-supportive developments. These efforts support the reduction of emissions through decreased use downtowns, sensible redevelopment of land, increased social equity, and a more connected regional transportation network.

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**BE A SOCIALLY RESPONSIBLE ORGANIZATION COMMITTED TO EQUITY AND SUSTAINABILITY**

Metra is obligated to consider equity in everything we do. Over the next five years, we seek to implement policies and projects that better meet the transit needs of historically disadvantaged populations, which include communities of color, low-income households, and the disabled. Prior to 2023, Metra started a major investment in 13 stations along the Metra Electric Line on the South Side of Chicago and in the south suburbs, and the Fair Transit South Cook Pilot Program. We will build on these programs to continue to advance transportation equity. This includes participation in programs that address equity within our organization like APTA’s Racial Equity Commitment Pilot Program.

Metra must also consider the sustainability of our services to support the region’s mobility needs in a manner that has the least environmental impact. We have initiated projects to reduce locomotive emissions and have worked with our regional partners to support public transportation and eliminate single-occupancy car trips; we are a part of a regional effort to combat climate change.

Our equity and sustainability objectives include:

- Reduced emissions from our rolling stock
- Use of sustainable and energy-efficient materials in construction projects
- Continue to meet and exceed federal and non-federal DBE goals
- Emphasis on equity in capital programming decision-making
- Active participation in local and regional transit-supportive planning studies
CONCLUSION

As we hope this document makes clear, Metra cannot continue operating as we have. The post-pandemic work environment of flexible schedules and telecommuting has changed our riders’ needs, and many believe this “new normal” is here to stay. Transit service focused on trips into and out of the Loop may need to be rebalanced with a demand for new types of service and we must be ready to respond.

Properly funding transit is an investment in connecting our residents to opportunities, keeping goods moving, creating well-paying jobs, and enabling inclusive growth. Metra has both an obligation and an opportunity to make equitable service and capital investments to improve mobility options for those who need it most and build a more resilient ridership base while doing so. Because Metra serves a vast area with safe, reliable, comfortable, and affordable trains, we are a vital resource allowing people of all means to travel long distances for work and recreational trips.

To face potential funding issues within this planning time frame, we must continue to examine the available resources and how to most effectively upgrade our assets. Metra’s funders – our local, state, and federal taxpayers – are requiring more efficiency in how we develop and implement our capital program. We must seek innovative methods to implement projects on time and on budget.

Finally, we need to embrace our role as part of an interconnected transportation network that serves the public for the economic welfare of the region. Local and regional economies depend on effective, reliable, and cost-efficient public transportation that connects residents to destinations. Public transportation should be an effective, environmentally friendly option for all residents today and in the future.

This plan has outlined steps we can and will take toward each of our goals within our existing resources. Some of our strategic goals, such as ensuring the Metra experience is safe, easy, and enjoyable; investing in our workforce; and innovating to become more efficient and effective, will be easier to achieve. Others more directly affected by post-pandemic uncertainty and our operating environment with freight railroads, such as enhancing service to grow ridership and committing to equity and sustainability, will be more difficult.

Metra is committed to doing everything we can to make our vision a reality, and we are proud of everything we have accomplished. But if Metra is to truly succeed, we must not be satisfied with our achievements and must strive to evolve, understand our funding constraints, and continue to contribute to economic growth and mobility in the region.
Local and regional economies depend on effective, reliable, and cost-efficient public transportation that connects residents to destinations.
To proactively address evolving transportation needs, Metra will provide regional rail service that supports sustainable connected communities.