



Finance & Administration Committee

Information Item IV-A

October 9, 2014

Momentum Update

Washington Metropolitan Area Transit Authority
Board Action/Information Summary

Action Information

MEAD Number:
201048

Resolution:
 Yes No

TITLE:

Momentum Progress Report

PRESENTATION SUMMARY:

Staff will summarize and present progress through FY14 on Momentum, the Authority's Strategic Plan.

PURPOSE:

Staff will present information summarizing accomplishments through FY14 towards achieving the goals outlined in *Momentum* as well update the Board on critical next steps in executing the strategic plan.

DESCRIPTION:

Key Highlights:

- *Momentum* priority actions have been thoroughly-integrated into the Authority's business-planning process;
- MetroForward initiative is already showing results in terms of more reliable service and better regional productivity
- A major milestone in funding Momentum is the \$75 million commitment from the jurisdictions to continue rebuilding efforts and lay the foundation for all eight-car trains, and buses for priority corridors;
- The community has shown tremendous support for Momentum, providing over 10,000 endorsements from businesses, governments, and individuals;
- Over 60 business allies have officially voiced support for Momentum;
- Notable accomplishments include achievements in all four of *Momentum's* strategic goals; and
- Critical next steps include the completed negotiation of a new Capital Funding Agreement which includes monies sufficient to advance the eight-car train program.

Background and History:

In 2011, Metro undertook a two-year effort to place the Authority on a strategic path to success. Intensive discussions by the Board of Directors, outreach to key stakeholders, and collaboration across the agency resulted in Momentum's new Vision, Mission, Goals and Priority Actions.

In that process, the Board endorsed four strategic goals:

- Build and maintain a premier safety culture and system.
- Meet or exceed expectations by consistently delivering quality service.
- Improve regional mobility and connect communities.
- Ensure financial stability and invest in our people and assets.

On June 27, 2013, the Board adopted Momentum as the strategic plan for Metro to guide it over the period 2013 to 2025.

Discussion:

Implementing Momentum began promptly in June 2013 as departments across Metro created business plans to link day-to-day activities to Momentum. The General Manager asked managers to build their plans, including any new proposed initiatives, around the strategic framework and 86 priority actions in Momentum. The Chief Performance Officer reviewed and certified all plans to ensure consistency and completeness.

By the end of the summer, Metro had a comprehensive set of 35 business plans in place covering all functional areas. These plans, which cover a three-year period, contain more than 1,000 actions necessary to make progress towards Metro's four goals and define specific measures and targets to evaluate success.

Among achievements in the first year of implementation, which are detailed in the report, Metro accomplished the following:

Goal 1 – Build and Maintain a Premier Safety Culture and System

- Closed an additional 14 National Transportation Safety Board (NTSB) recommendations, bringing the total to 24;
- Became the first rail transit agency in the nation to launch a Close Call program, in partnership with Local 689 and the Bureau of Transportation Statistics (BTS);
- Completed Station Emergency Response and Evacuation Plans (EREPs) for 25 Metrorail stations;

Goal 2- Meet or Exceed Customer Expectations

- Completed mezzanine lighting upgrades and enhancements in 38% of underground stations;
- Instituted a “We Care” program to train bus operators and bus managers in better customer service;
- Placed 105 New Flyer Xcelsior hybrid-electric buses into service;
- Awarded a contract for a New Electronic Payments Program (NEPP), the next generation of regional fare planning and payment;

- Embraced an agency-wide approach to reduce fatigue with a science-based approach;

Goal 3 – Improve Regional Mobility and Connect Communities

- Prepared the Silver Line for opening in July of 2014
- Engaged local jurisdiction planning and economic development staffs to develop, review, or refine small area plans and sector plans surrounding Metrorail stations to ensure that such plans facilitate Transit-Oriented Development
- Advanced ConnectGreaterWashington, the region’s blueprint for a future transit network, with jurisdictional partner transportation and planning agencies
- Worked with officials from Arlington County and City of Alexandria to plan, design, construct, and establish service for the Crystal City / Potomac Yard (CCPY) Transitway, the region’s first bus rapid transit (BRT) mode;

Goal 4 – Ensure Financial Stability and Invest in Our People and Assets

- Secured a pledge of \$75 million from Virginia, Maryland, and the District of Columbia, as a down payment for the capital initiatives collectively called Metro 2025
- Completed construction on two Leadership in Environmental Excellence and Design (LEED) facilities this year including the Franconia Springfield police facility and the design phase of Andrews bus garage; and
- Launched a Sustainability Initiative to make WMATA the greenest transit authority in the nation;
- Reached a groundbreaking collective bargaining agreement with Local 2, which established affordable and responsible compensation structures.

Metro is currently working with regional funding partners to execute a new Capital Funding Agreement. This is a critical milestone in implementing the strategic plan, as sufficient funds must be included in this agreement to move forward with the eight-car train program, and these funds must be committed by July 2015 or the initiative will be delayed for at least five years.

In order to continue to advance the strategic plan, a critical next step is securing sufficient funding for the additional rolling stock in the remaining two options for 220 7000-series rail cars and cementing this into a new Capital Funding Agreement. Upon completing this step, the immediate next priority must be the adoption of ConnectGreaterWashington, the blueprint for regional transit through the end of this century. Finally, staff anticipates updating the strategic plan during FY 2017, which coincides with Metro’s 40th anniversary. Board attention to this updated strategic plan will ensure that Metro continues to advance implementation of *Momentum*.

FUNDING IMPACT:

This is an information item - there is no funding impact at this time.	
Project Manager:	Shyam Kannan
Project Department/Office:	Chief of Staff/Office of Planning

TIMELINE:

Previous Actions	<p>June, 2013 - Board adoption of the new strategic plan, <i>Momentum: The Next Generation of Metro</i>.</p> <p>May, 2014 - Board approval of the FY2015 capital budget and the FY2016-FY2020 capital improvement program, both of which include initial investments to advance Metro 2025 capital initiatives highlighted in the <i>Momentum</i> strategic plan.</p>
Anticipated actions after presentation	Finalization of the next Capital Funding Agreement

RECOMMENDATION:

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Washington Metropolitan Area Transit Authority

Momentum One Year of Progress

Customer Service and Operations Committee
October, 2014



Purpose

Update the Board on Strategic Plan accomplishments through FY14

Metro 2025 Initiatives





86 Momentum Actions

↪ 1,039 Business Plan Actions

Conclusion: 99% Strategic Actions Covered

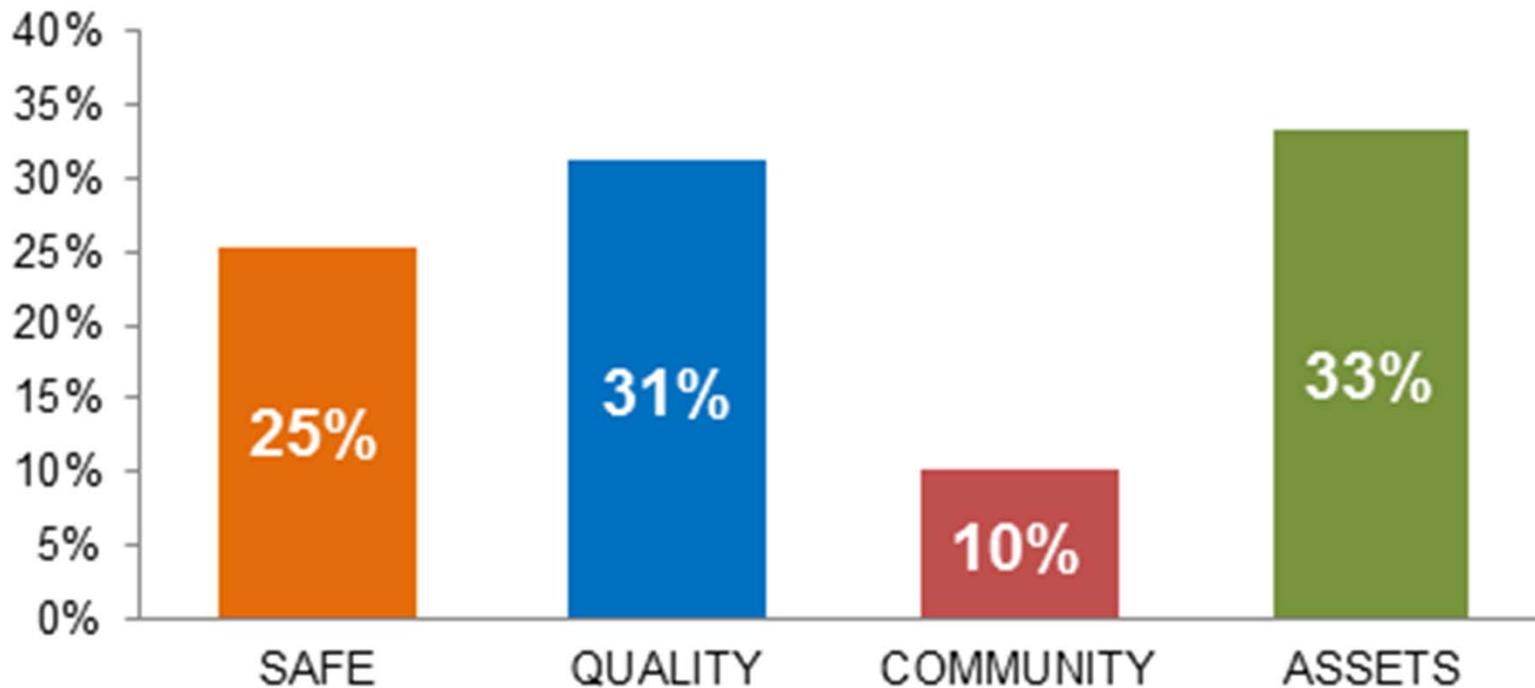


Strategic Goal: Build and maintain a premier safety culture and system				
Performance Measure	Target	Action	Action Owner	Dependency
Strategic Goal: Meet or exceed customer expectations by consistently				
SAFE				
Strategic Goal: Improve regional mobility and connect communities				
DGMO				
Strategic Goal: Ensure fiscal stability and invest in our people and assets				
CIVR, PLAN				
CHOS				
Performance Measure	Target	Action	Action Owner	Dependency
Number of Positions Filled	2,100	Participate in inter-departmental team to conduct a second employee engagement survey.	Harcum	HR
		Serve as Human Capital Management (HCM) project officer.	Burnside	HR
		Collect Bus and Rail Fleet Reliability data and work with BMNT and CMNT to analyze trends, ask questions on why performance changed and gain input/consensus on actions to improve. Produce Vital Signs Report for various audiences, including internal management (monthly), Board of Directors (quarterly) and the public on wmata.com Scorecard (quarterly).	Hyatt Everett Quinn	BMNT CMNT



Strategic Plan and Business Plan

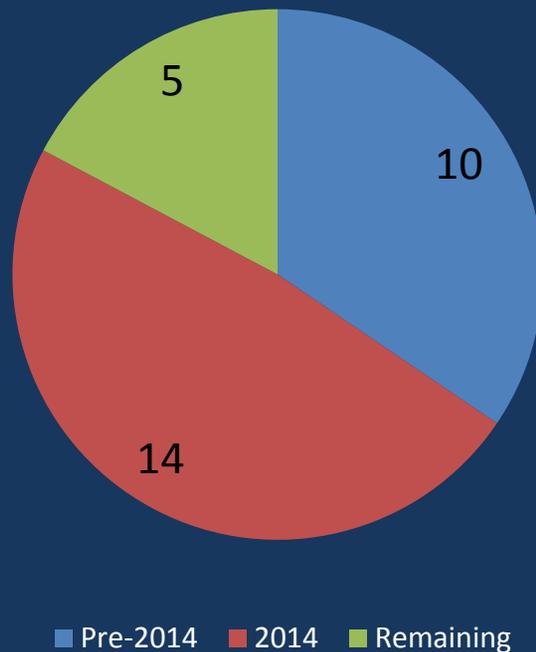
Proportion of Total Business Plan Actions by Goal





Create and Maintain a Premier Safety Culture and System

NTSB Recommendations (Closing Fiscal Year)



- Close Call Program
- Station Emergency Response and Evacuation Plans
- Mezzanine Lighting Upgrades
- Fatigue Management Program*



Meet or Exceed Customer Expectations



- Customer Care Initiative
- NEPP Contract Awarded
- “We Care” Bus Driver Program
- “Ride Safe” Program
- LED Signs
- Real-time bus stop information

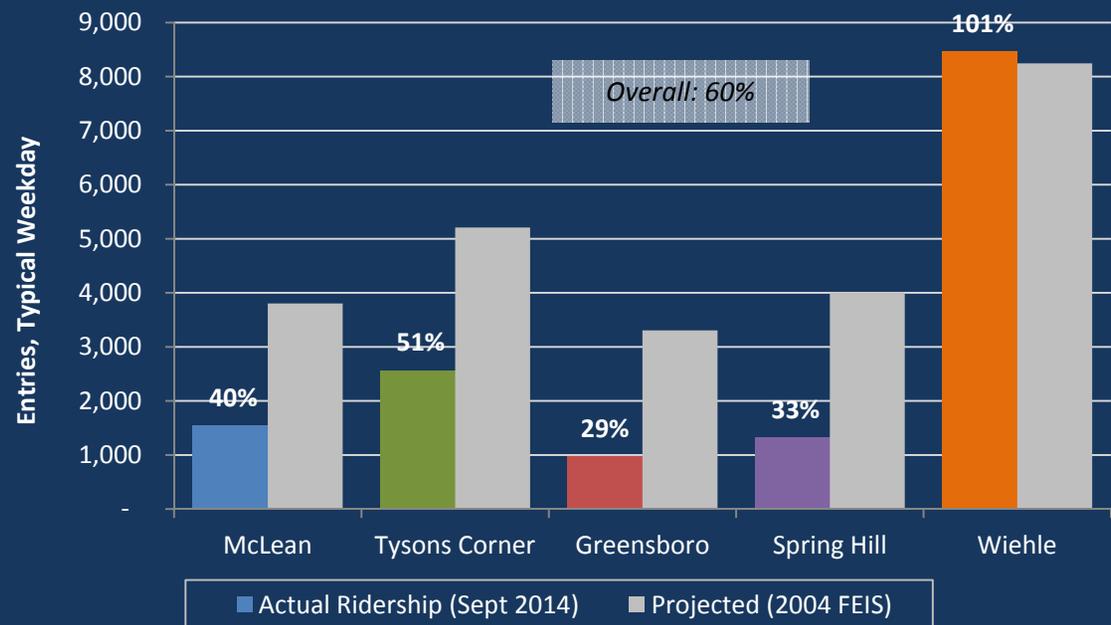


Improve Regional Mobility and Connect Communities

Silver Line Performance

- At 60% of projected ridership
- 14,800 entries/day, over half at Wiehle
- Wiehle over projections already; commuting powerhouse
- Weekend ridership at Tysons exceeds weekday ridership

Ridership Compared to Projections



Opening of MetroWay
The region's first BRT line



Ensure Financial Stability and Invest in our People and Assets



Energy Efficient Station Chillers

- Super high efficiency magnetic bearing chillers
- Improved comfort
- Forest Glen, Wheaton, Crystal City, and Potomac Avenue

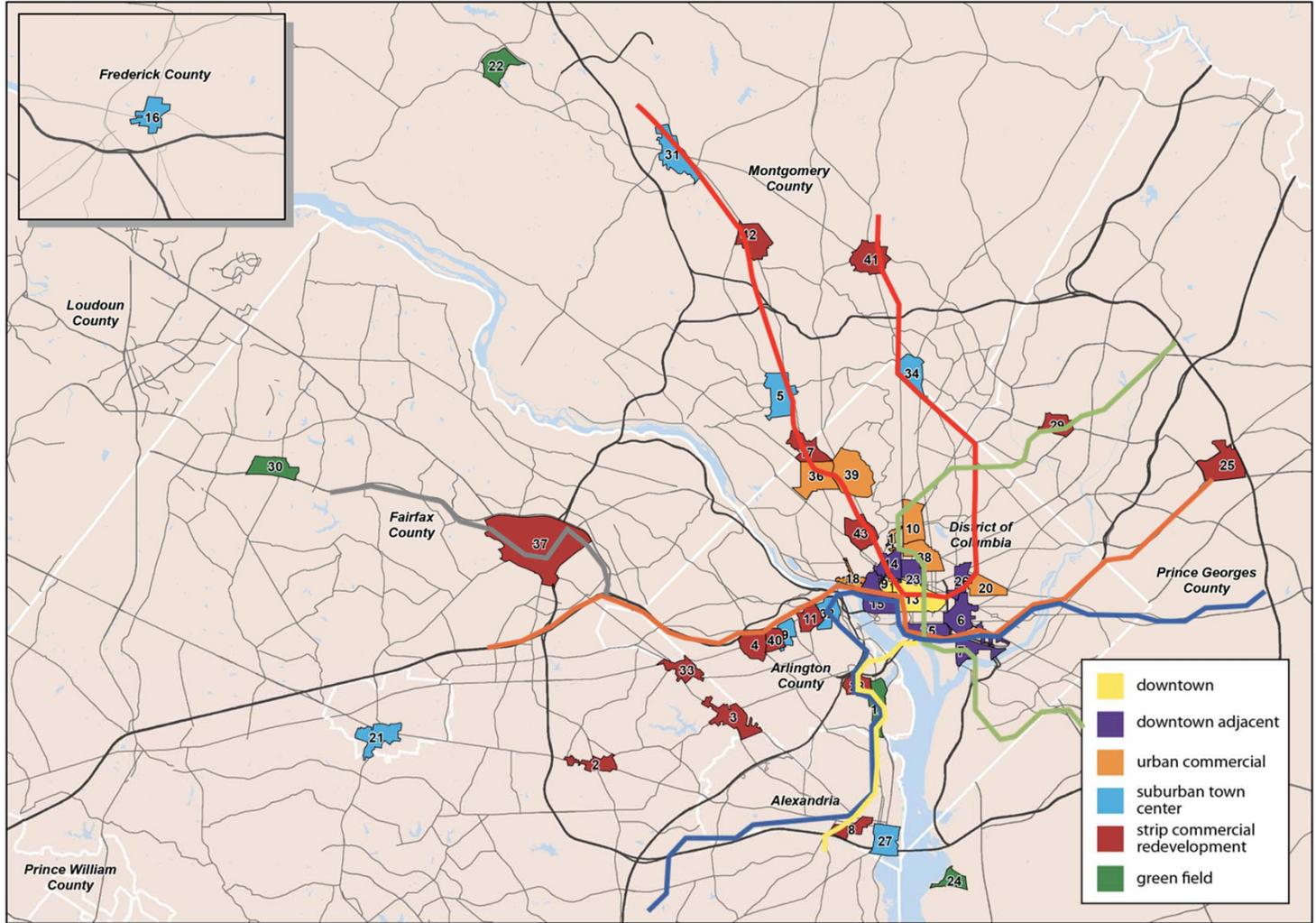


Estimated annual saving of \$15,000 per station

- \$75M down payment for Metro 2025 from MD, VA and DC
- Collective Bargaining Agreement
- Sustainability Initiative
- Human Capital Management System
- Asset Management Plan



The Region Relies on Metro's Success



Source: George Washington University



The Region Relies on Metro's Success

Jurisdiction	Under Construction (SF, Millions)	Proposed (SF, Millions)	Total (SF, Millions)	Appx. Value* (\$2014)	Annual Property Tax Revenue* (\$2014)
DC	9.3	45	54.3	\$24.4 B	\$305.4 M
Maryland	4.7	15	19.7	\$6.9 B	\$89.6 M
Virginia	6.7	24.5	31.2	\$9.4 B	\$121.7 M
Total	20.7	84.5	105.2	\$40.7 B	\$516.8 M

Source: Jones Lang LaSalle, 2014; *WMATA Office of Planning Preliminary Analysis, 2014



Benefits of Metro 2025

Metro 2025 – Benefits

35% Capacity Increase on Rail System

100,000 More Trips on Bus Network

Better Customer Information

Resolve Infrastructure Constraints

Regional Economic Vitality

Metro 2025 – Supporters

Business Community

Jurisdictions

Advocacy Groups

Customers

Non-Profits



Metro 2025 Key Milestone



- Eight-car trains: *must exercise remaining options for 220 additional 7000-series cars in July of 2015*
 - *If monies not committed, could delay program by five years or more*



Next Steps

- Complete the Capital Funding Agreement
- Adopt ConnectGreaterWashington
- Update Momentum in 2017