



# **Massachusetts Bay Transportation Authority**

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## **Human Resources Update Workforce & Strategy Q3 CY-2017 / Q1 FY-2018**

**October 23, 2017**



# STRATEGIC INITIATIVES



## CAR CARDS – JOIN STAY GROW BRANDING ADS

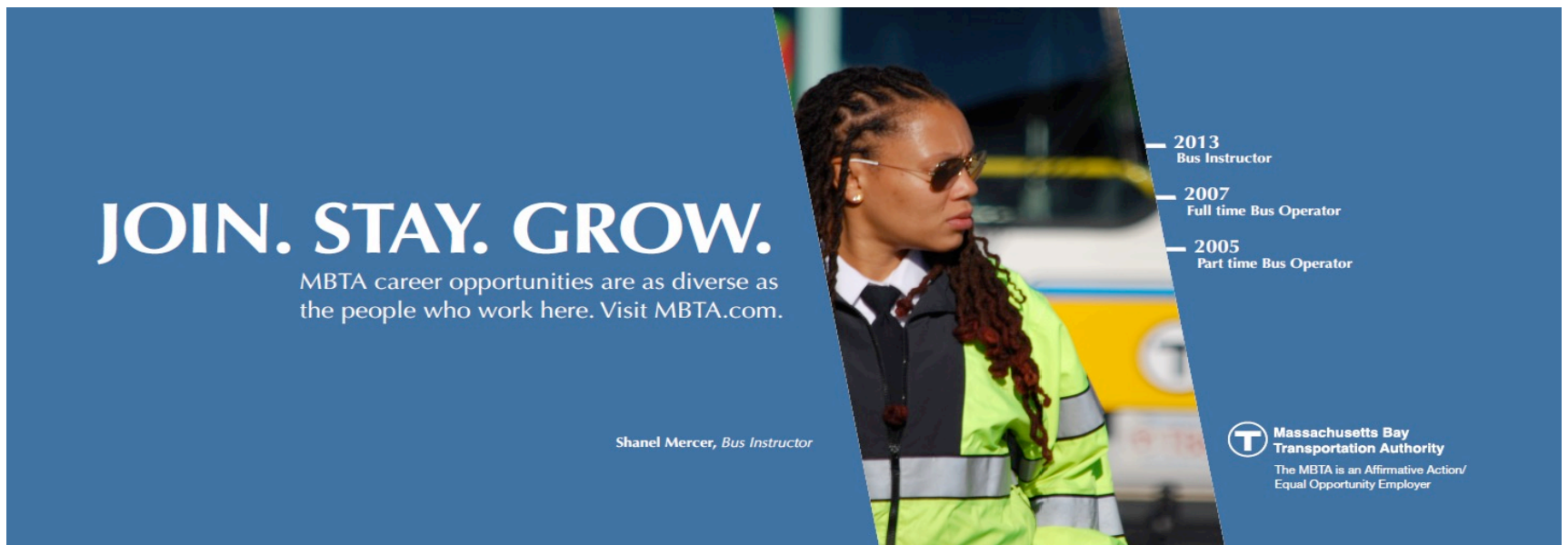


*“ The possibility for our impact is immense and I’m excited to work with communities, municipalities, and private sector partners. ”*

Janelle Chan  
Deputy Chief – Real Estate

Apply at [MBTA.com](http://MBTA.com)


Join. Stay. Grow.  **Massachusetts Bay Transportation Authority**  
The MBTA is an Affirmative Action/  
Equal Opportunity Employer



**JOIN. STAY. GROW.**  
MBTA career opportunities are as diverse as the people who work here. Visit [MBTA.com](http://MBTA.com).

Shanel Mercer, *Bus Instructor*

- 2013  
Bus Instructor
- 2007  
Full time Bus Operator
- 2005  
Part time Bus Operator

 **Massachusetts Bay Transportation Authority**  
The MBTA is an Affirmative Action/  
Equal Opportunity Employer



## DIGITAL – JOIN STAY GROW BRANDING ADS



*“Everyday has a new set of challenges and you’re always learning.”*

Evan Rowe  
Director of Revenue

Apply at [MBTA.com](https://www.mbta.com)

Join. Stay. Grow.  Massachusetts Bay Transportation Authority  
The MBTA is an affirmative action equal opportunity employer.



- 2015 Division Chief, Light Rail
- 2012 Deputy Director of OCC & Training
- 2011 Superintendent, Light Rail
- 2003 Chief Inspector/Instructor
- 1997 Motorperson

Tamiaka Thibodeaux, Division Chief, Light Rail

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*“We understand that you treat the employees well and in turn they’ll treat the customers well.”*

Juan Concepcion  
Director of Policy and HR Compliance

Apply at [MBTA.com](https://www.mbta.com)

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The MBTA is an affirmative action equal opportunity employer.

**MBTA Join. Stay. Grow. Campaign – Communication Action Plan  
Phased Campaign Rollout September 2017 – June 2018**

<b>SEPTEMBER 2017</b>	
Dates	Tactics
September/2017	In-Station Digital, 3 Creatives Rotation
September/2017	Web Site Launches Web Promo on MBTA.com Press release Twitter/Social Media Links on MassDOT Website

**Completed**

<b>SEPTEMBER 2017</b>	
Dates	Tactics
September/2017	Car Cards – Subway and Bus, 4 Creatives Rotation
September/2017	E-mail Blast to Schools <ul style="list-style-type: none"> <li>• Northeastern</li> <li>• Wentworth</li> <li>• Worcester Polytechnical Institute</li> <li>• Bentley</li> <li>• Umass</li> </ul>
September/2017	E-Mail Blast to Veterans Organizations <ul style="list-style-type: none"> <li>• Chelsea Soldiers Home Dept. of Veterans Services</li> <li>• U.S. Marine Corps.</li> <li>• MA Dept. of Career Services – Veterans Employment</li> </ul>
September/2017	E-Mail Blast to Community Organizations <ul style="list-style-type: none"> <li>• Mass Trade Women’s Assoc.</li> <li>• Commission for the Blind</li> <li>• Asian American Civic Assoc.</li> <li>• Get Konnected</li> <li>• Excel Rail Management</li> <li>• Mass Assoc. of Hispanic Attorneys</li> <li>• Employment &amp; Training Resources</li> </ul>

**Completed**

**Completed**

<b>OCTOBER 2017</b>	
Dates	Tactics
October/2017	Facebook Page with Testimonials and Links to videos

<b>NOVEMBER 2017</b>	
Dates	Tactics
November/2017	Twitter Links to Videos

<b>DECEMBER 2017</b>	
Dates	Tactics
December/2017	Rick Colon: Town Halls/Government E-mail Blast
December/2017	E-mail Blast to Government Organizations <ul style="list-style-type: none"> <li>• Access Advisory Committee to the MBTA</li> <li>• MassPort Workforce Diversity Program</li> <li>• Mass Dept. of Career Services</li> <li>• DCAMM</li> <li>• Executive Office of Health &amp; Human Services</li> </ul>

<b>JANUARY 2018</b>	
Dates	Tactics
January/2018	MassDOT Digital Billboards, 3 Creatives Rotation

<b>FEBRUARY 2018</b>	
Dates	Tactics
February/2018	Car Cards – Subway and Bus, 5 Creatives Rotation
February/2018	E-Mail Blast to Veterans Organizations
February/2018	E-Mail Blast to Community Organizations

<b>MARCH 2018</b>	
Dates	Tactics
March/2018	Facebook Page with Testimonials and Links to videos

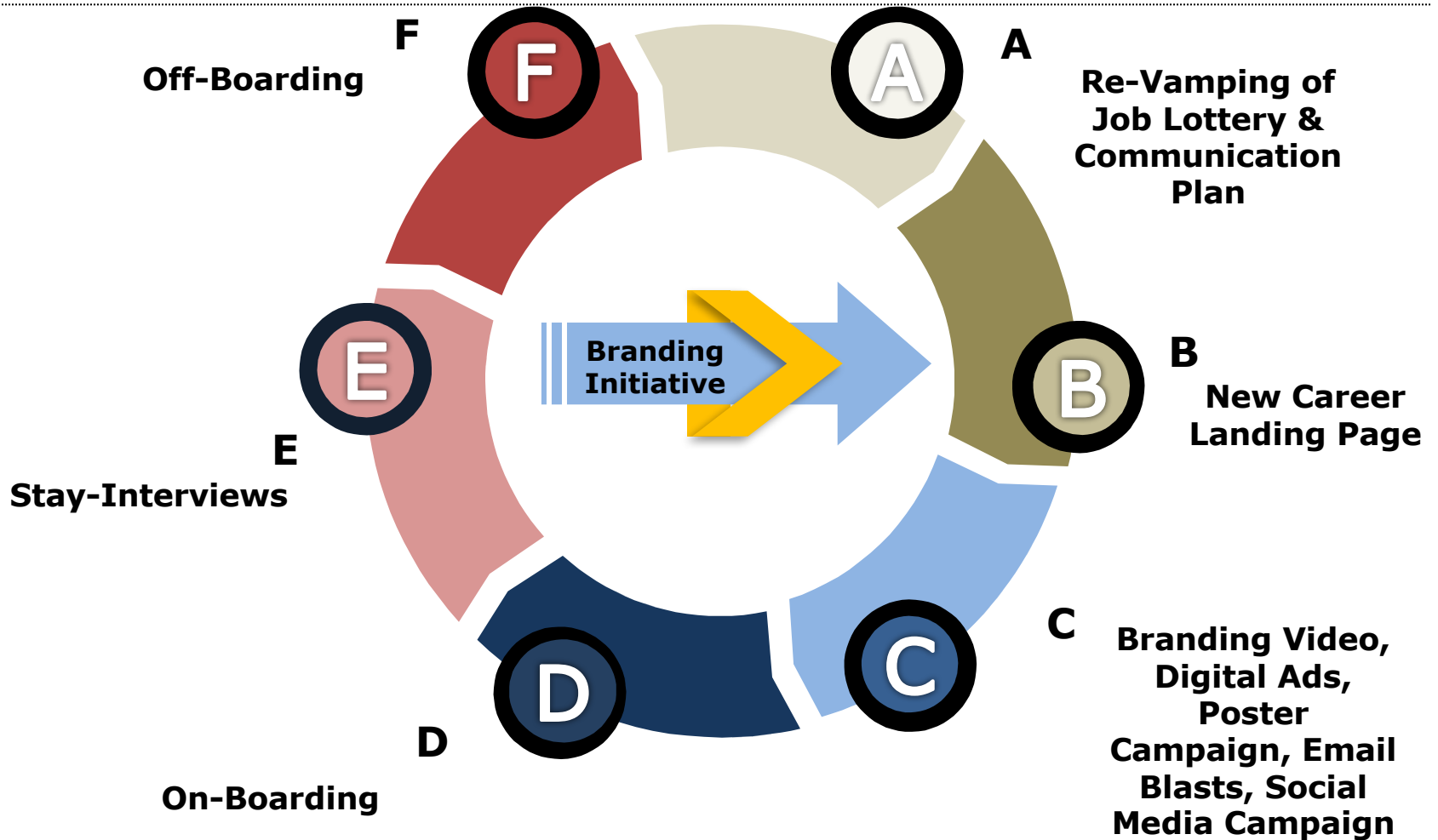
<b>APRIL 2018</b>	
Dates	Tactics
April/2018	In-Station Digital, 3 Creatives Rotation

<b>MAY 2018</b>	
Dates	Tactics
May/2018	E-mail Blast to Schools
May/2018	Updated Twitter Links to Videos

<b>JUNE 2018</b>	
Dates	Tactics
June/2018	MassDOT Digital Billboards, 3 Creatives Rotation



## Phase 2 Branding – Multi-Phase Initiative





# **Compensation: Approach to the Talent Challenge**





## Compensation: Approach to the Talent Challenge

**1** Phase I  
Jan – July  
2017

✓ **Internal Talent Parity**

- ✓ We've developed an understanding of how we are currently compensating our leaders & identified parity risks through an Internal Study
- ✓ 1/17/17 Outlined recommended immediate compensation adjustments for high-value roles & retention of talent.
  - ✓ 10 Salary Adjustments made effective 3/30/17
  - ✓ 52 Add'l Salary Adjustments made effective 7/2/17

Completed

**2** Phase 2  
Jan – July  
2017

✓ **Benchmark / Align Compensation to Market**

- ✓ RFP issued on 11/21/16 - RFP Comp Committee interviewed vendors in January 2017 with contract execution planned by March
- ✓ This competitive analysis will help set up a baseline view of how MBTA's pay levels compare to market.
  - ✓ 6/1/17 Formal Kick-off of project
  - ✓ Held Various information gathering interviews with Sr. Leaders (June & July 2017)
  - ✓ Preliminary Data Analysis completed on 7/31/17

Completed

**3** Phase 3  
Jan – Dec  
2017

✓ **Talent Management**

- ✓ Implement a Talent Management Process to identify hi-potential talent and develop plans to invest in them
- ✓ Implement a Succession Planning Process to ensure a pipeline of "ready now" talent is available to ensure continuity of the MBTA

In-Process

**4** Phase 4  
Sept/Oct  
2017

✓ **Review of Mercer Study**

- ✓ Last stretch of project where Consultants will meet with CHRO on 8/17/17 to discuss Compensation Philosophy and initial results of study

In-Process

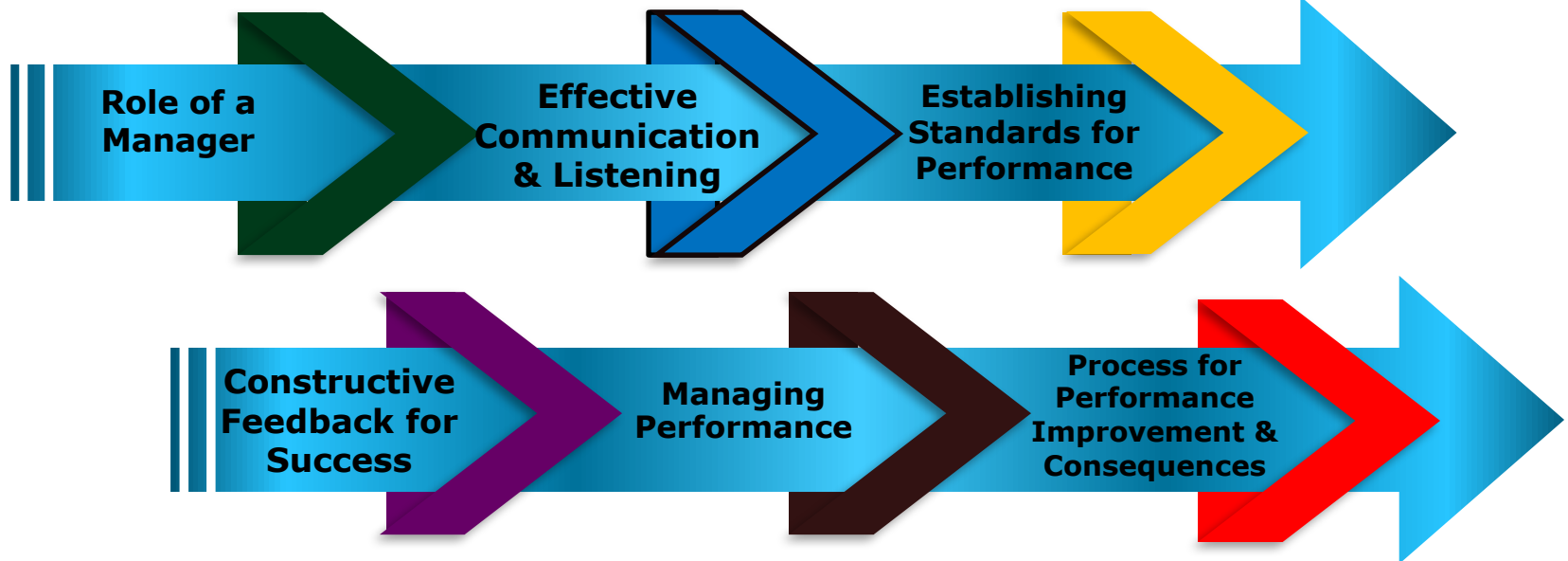




## PERFORMANCE MANAGEMENT TRAINING

How do we manage performance?

- 570 Supervisors & Managers Trained
- 10/24/17 – Additional 30 scheduled
- 11/7/17 – Additional 19 scheduled
- Dec Class - TBD



# Manager and Supervisor Certificate Program

MassDOT University is proud to introduce our new Manager and Supervisor Certificate Program. This is an excellent chance for new leaders or those who aspire for manager / supervisor roles to receive formal training.

## *Topics to be covered include:*

- The Role of the Manager
  - Leading a Team
  - Effective Communication
- Setting expectations / Giving Feedback
  - Time Management
- Key Human Resource Policies
  - Situational Leadership
- Customer Service / Conflict Management
- Project / Process / Fiscal Management
  - Change Management

To earn the certificate participants will attend 3 core classes that are 4 hours each, and then 8 additional hours of training chosen from a variety of elective classes.

## **NEW FOR 2017!**

### **Quick Information:**

#### **Duration:**

The core program is 3 classes that are each 4 hours long.

#### **Who Can Attend:**

- New managers or supervisors
- Individuals that are candidates for management / supervisory roles
- Experienced managers who feel formal training would be of value

#### **Dates Offered:**

- Class #1: Jul. 13 or Aug. 9
- Class #2: Aug. 3 or Aug. 16
- Class #3: Aug. 29 or Sept. 14

#### **Time and Location:**

Classes will run 8:30 am - 12:30 pm and be held at 10 Park Plaza

### **TO SIGN UP**

@

email Suzette King  
at MassDOT University:  
Suzette.King@dot.state.ma.us

Indicate what dates you would be able to attend. Select a date for a Class I, Class II, and Class III.

*Summer seating is limited, but more dates will be offered in the fall.*

## **Manager & Supervisor Certificate Program**

- July – Oct Session
- Oct – Dec Session
- Total of 50 MBTA Participants (*Supervisors & Managers*)

# TALENT REVIEW & SUCCESSION PLANNING

Too New to Evaluate:

POTENTIAL (Second Number)		
1 At highest potential and best use	2 Expandable potential with known limits; not exponential	3 Limit unknown; runway beyond what we can see currently

PERFORMANCE (First Number)	3 Exceeds Performance Expectations	<p><b>3.1</b> Ensure employee remains current in area of specialty by selecting dev. Challenges within current job; assign to critical role on project in which their tech. expertise is valuable.</p>	<p><b>3.2</b> Place in mission critical jobs where success is needed; identify gaps in leadership competencies &amp; use in dev-in-place assignments; conduct full 360 for baseline; required to have a personal development plan. Utilize development discussion to identify roadblocks to further potential.</p>	<p><b>3.3</b> Ensure a personally devised retention plan is in place and continue to challenge the individual with new and diverse assignments.</p>
	2 Meets Performance Expectations	<p><b>2.1</b> Maximize exposure &amp; involvement in their specialty. Establish stretch goals to increase skills &amp; competencies &amp; increase performance.</p>	<p><b>2.2</b> Identify gaps in key tech/functional knowledge &amp; leadership competencies &amp; incorporate into development plan.  Based on development discussion, create a dev. Plan that would assist person in moving towards an 2.3 or develop deeper skill/knowledge in his/her field to move to a 3.2.</p>	<p><b>2.3</b> Create &amp; guide the individual through focused &amp; diverse learning &amp; development assignments. Ensure there is a personally designed retention plan to "make sure" the individual stays with the org. Stretch &amp; challenge the individual to sustain increased performance &amp; actualize his/her potential.</p>
	1 Does Not Meet Performance Expectations	<p><b>1.1</b> Place on a time-bound measurable performance improvement plan or arrange to exit the company.</p>	<p><b>1.2</b> Identify gaps in technical/functional knowledge &amp; leadership competencies; assign key technical/functional work or projects to increase technical knowledge; place on a time-bound measurable development plan to address gaps &amp; improve performance.</p>	<p><b>1.3</b> Assess performance &amp; experience history to determine what you would expect them to know/be skilled in; identify current areas of difficulty in role and root cause of difficulty</p>



# Time to Hire & Critical Hires





## Time-to-Hire (# of Positions Filled to Open Job Reqs)

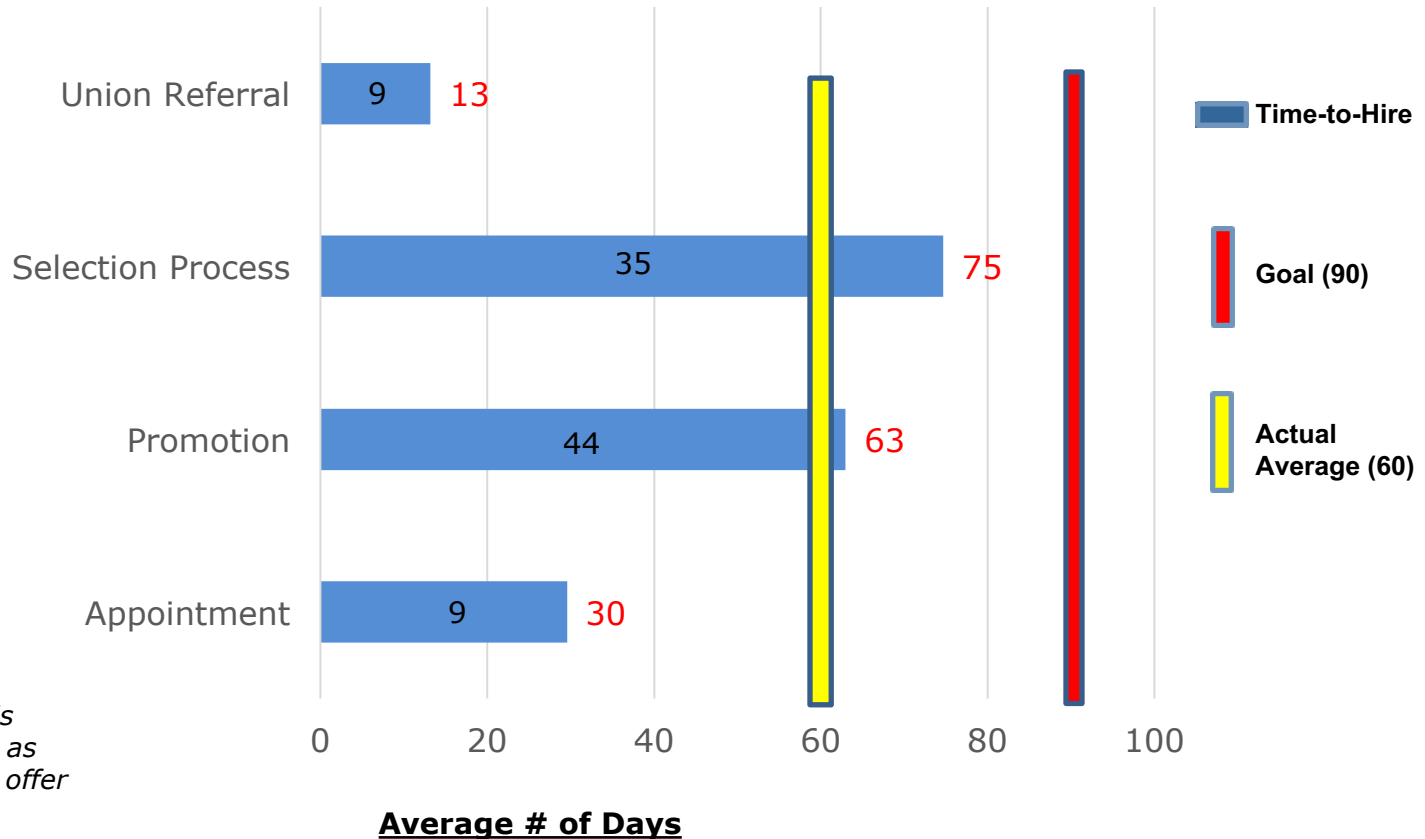
Q3 – CY 2017 Time to Hire By Hiring Method

### Q3 – CY 2017 Executive Summary

**Date Range:**  
07/01/2017 –  
09/30/2017

**Total Hires: 97**

**Average time to  
hire: 60 Days**



*Note: For the purposes of this report, time to hire is defined as the date of job posting to the offer date.*



## Time-to-Hire / Program Hiring (*Lottery and T Police*)

### Q3 – CY 2017 Executive Summary

**Date Range:**  
07/01/2017 –  
09/30/2017

**Total Hires: 43**

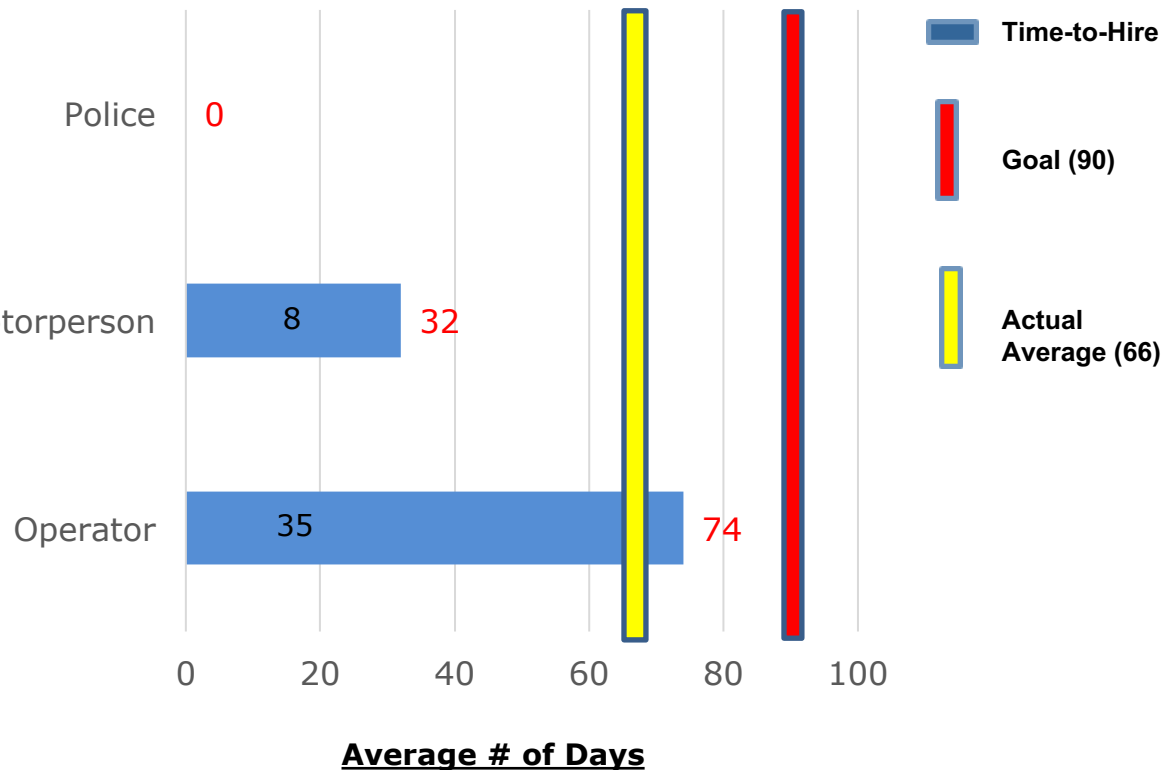
**Average time to  
hire: 66 Days**

*Note:* For the purposes of this report, time to hire for Lottery is defined as the interview date to the job offer date

For T-Police, time to hire is defined as the date offering candidates to start the process to the job offer date.

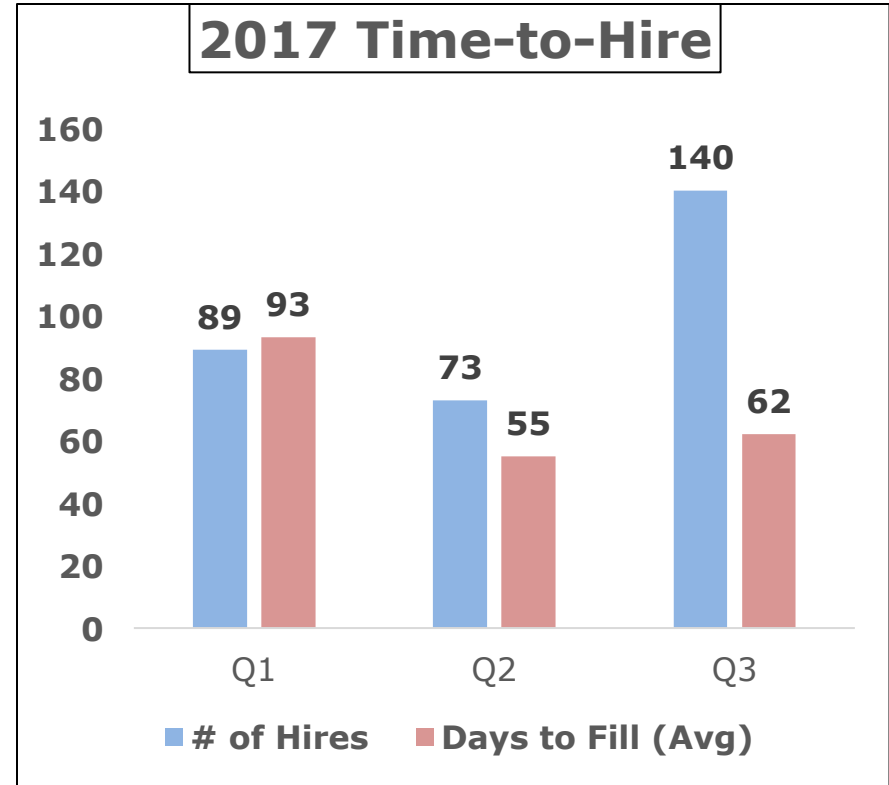
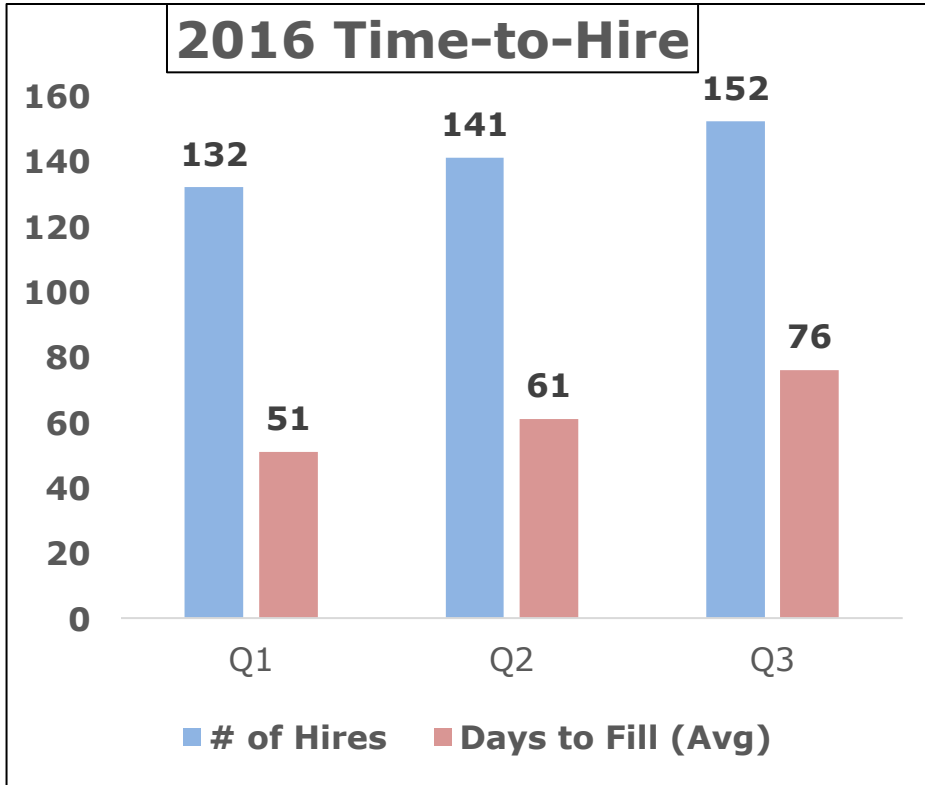
For Streetcar, it is defined as the date the need arose for Operations to hire date (of already hire-ready candidates)

Q3 – CY 2017 Time to Hire By Hiring Method



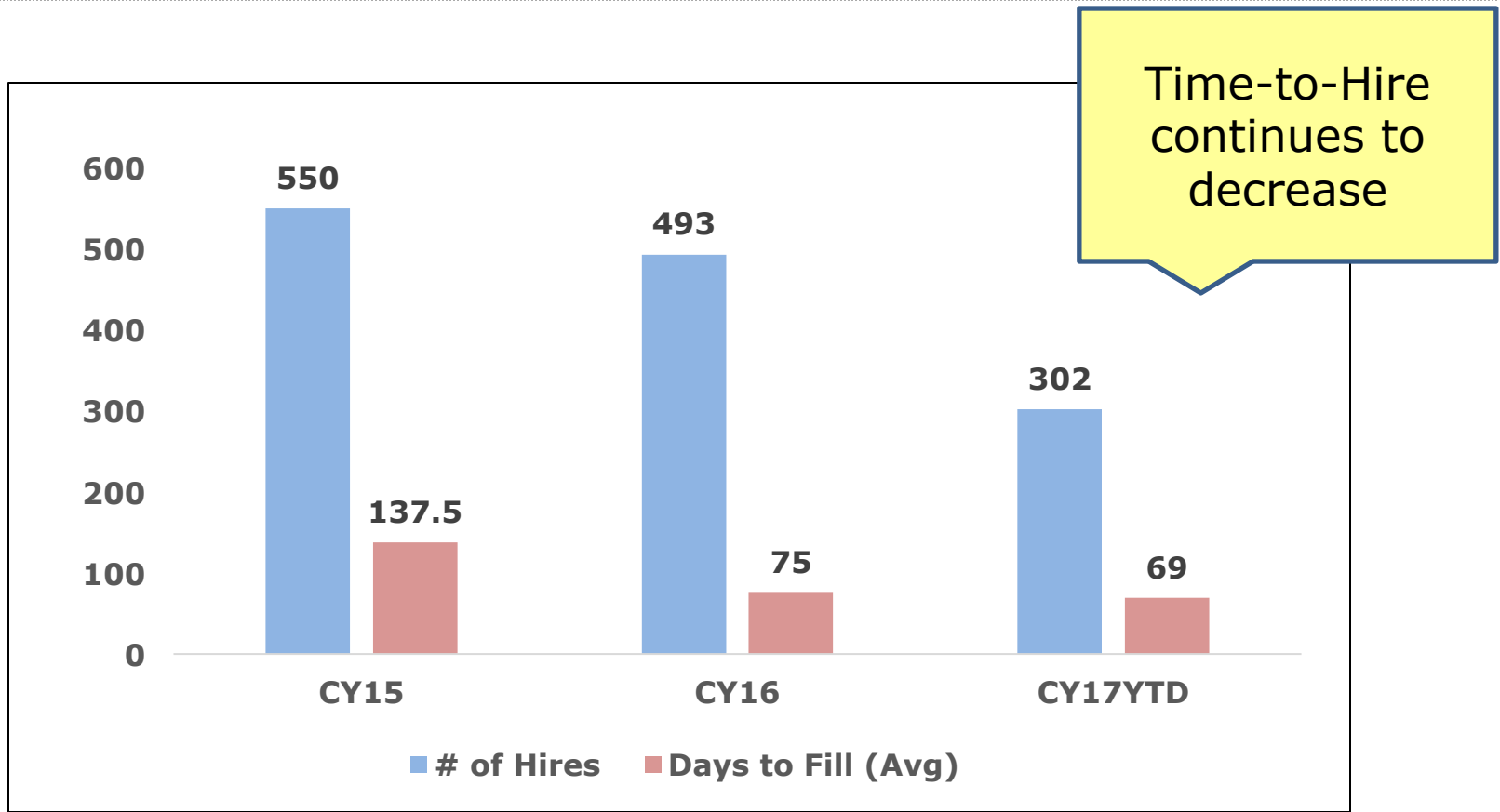


## Time-to-Hire (CY2016 vs CY2017)





## Time-to-Hire (CY-2015, CY-2016, & CYTD-2017)



**Decrease of 45% CY15 vs CY16**

**Decrease YTD of 8% CY17 vs CY16**





## Hire Highlights – CY 2017 YTD

### CRITICAL HIRES WORKING ON

#### **Capital Delivery/GLX:**

- Sr. Project Mgr–Bridge (Mgr Chg'd JD–Reposted)
- Sr. Project Mgr–Bridge & Tunnel Inspect (Reposted)
- Deputy AGM for Transit Programs (INT 10/19)
- Resident Engineer(s) (filled 6 out of 9-reviewing resumes)
- Structural Engineer (offer in progress)
- Train Control & Signals Engineer (INT w/of 10/17)
- GLX Program Counsel (offer in progress)

#### **Operations:**

- Chief Engineer (Candidate accepted another position)
- Mgr Tech Project Vehicle Eng. (Candidate in process)
- Supt of Maintenance (Candidates in review)
- Chief Operating Officer (Search Firm)
- Superintendent MOW (Reviewing resumes)
- Supt. Power Systems & Equip (Reviewing resumes)

#### **Administration:**

- Chief Customer Experience Officer (Reviewing resumes)
- Dir. Risk Management (Finalist interviewing 10/27 & 10/31)
- Program Manager – AFC 2.0 (Search Firm)
- Executive Director Commuter Rail Ops (Search Firm)

	Q1 Hires	Q2 Hires	Q3 Hires
Administration	11	10	35
Operations	27	9	41
Capital Delivery/GLX	7	24	21
<b>Total</b>	<b>45</b>	<b>43</b>	<b>97</b>

<u>PROGRAM HIRING</u>	Q1 Hires	Q2 Hires	Q3 Hires
Lottery–Operators	27	26	43
T-Police	17	4	0
<b>Total</b>	<b>44</b>	<b>30</b>	<b>43</b>

<b>GRAND TOTAL HIRES</b>	<b>89</b>	<b>73</b>	<b>140</b>
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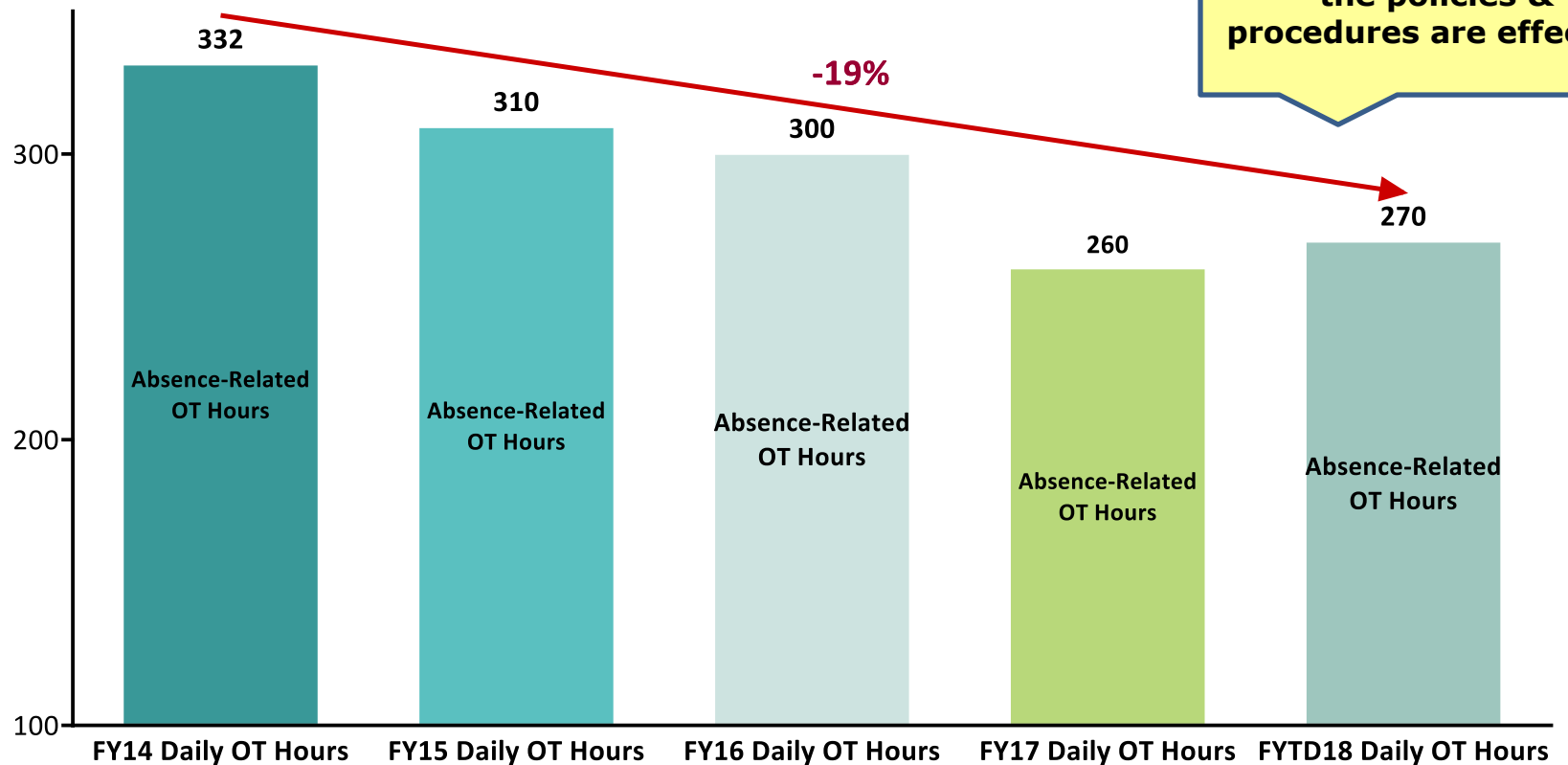
# Overtime





## Average Daily Absence-Related Overtime Hours are Flat Year-over-Year and Trending down when compared to past years.

Average Absence Related OT Hours per Day (Operators)



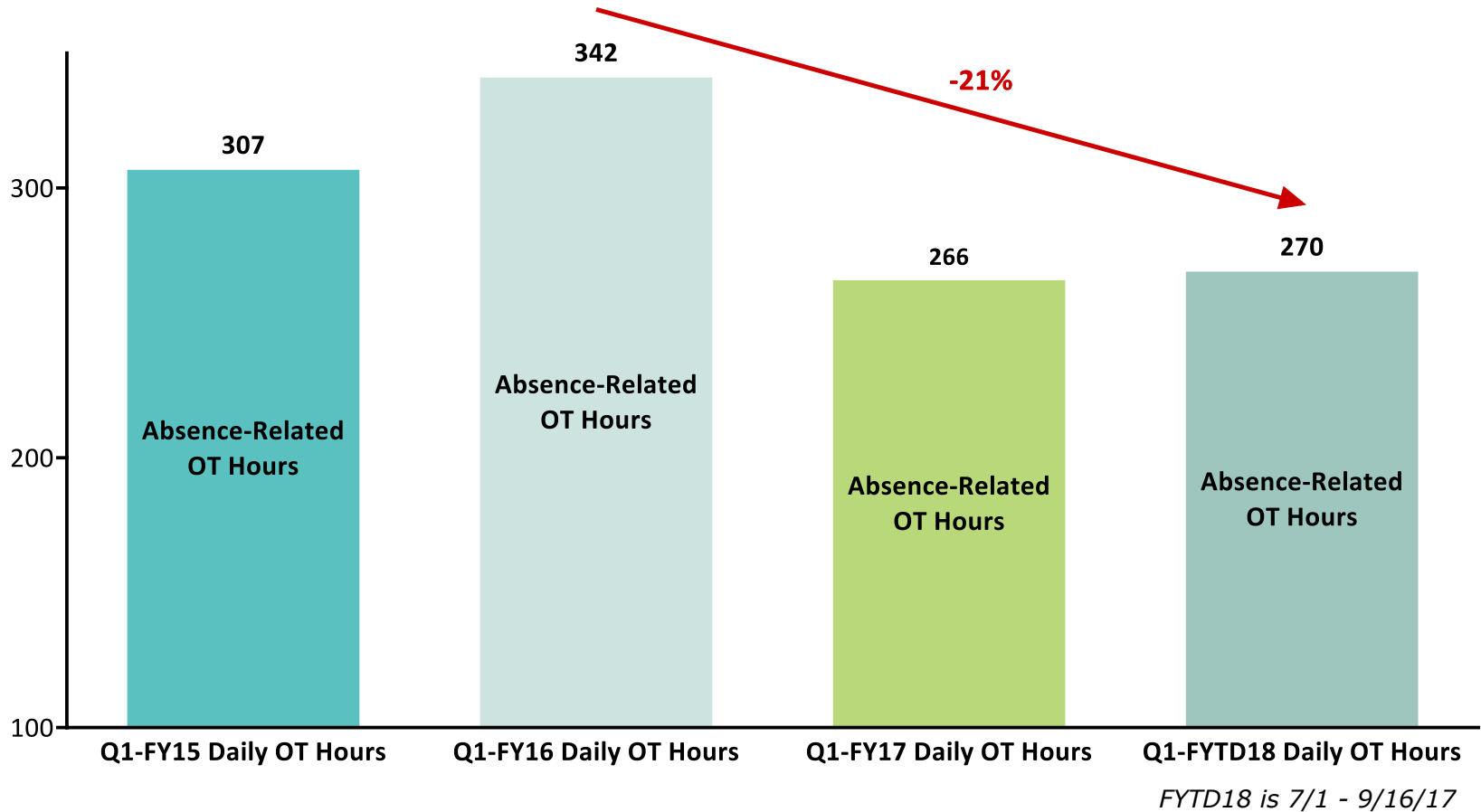
Overall Trend Continues to be down showing that the policies & procedures are effective

FYTD18 is 7/1 - 9/16/17



## Avg Daily Absence-Related Overtime Hours are Flat Quarter-over-Quarter and Trending down when compared to past years

**Average Absence Related OT Hours per Day (Operators)**





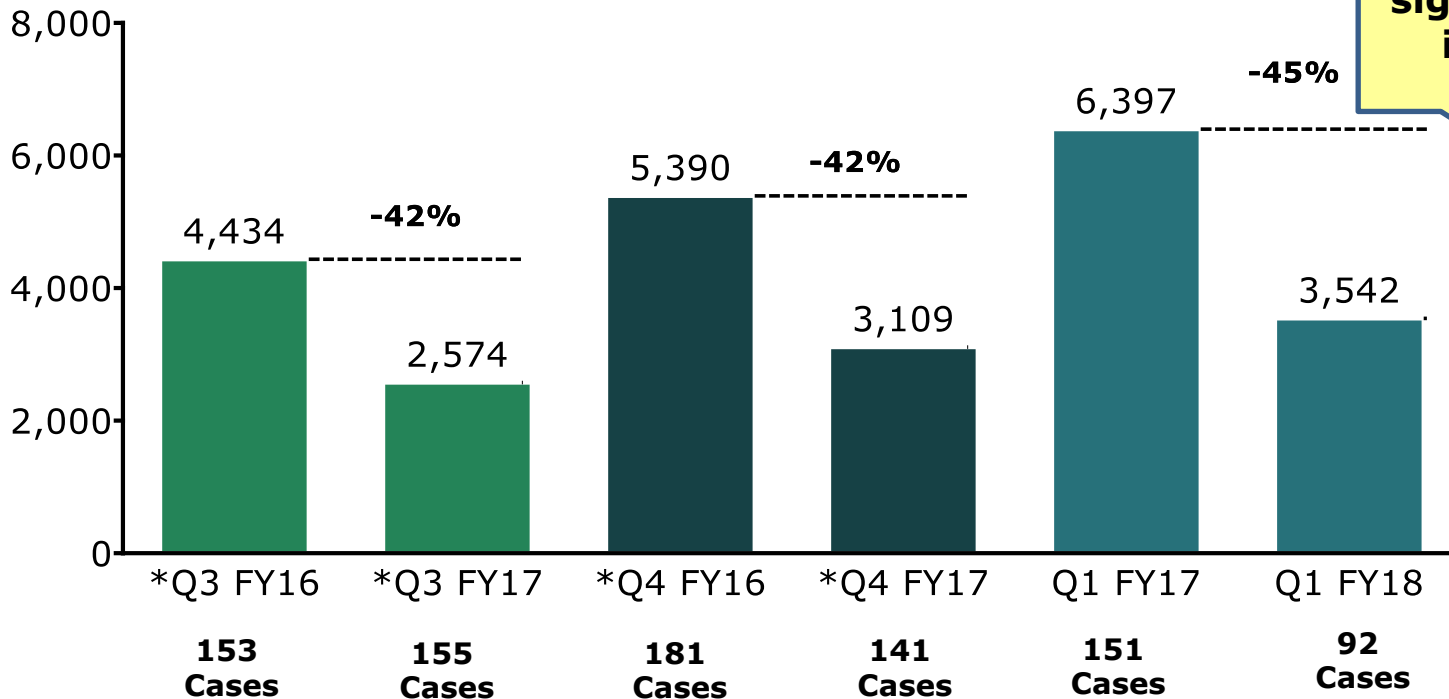
# Absence Management & TPA Update





## Case Management: Continuous Leave as an Accommodation under ADA 2016 vs 2017

Days Absent



**This is a real success story – not only is there a reduction of cases but also a significant reduction in the # of days absent.**

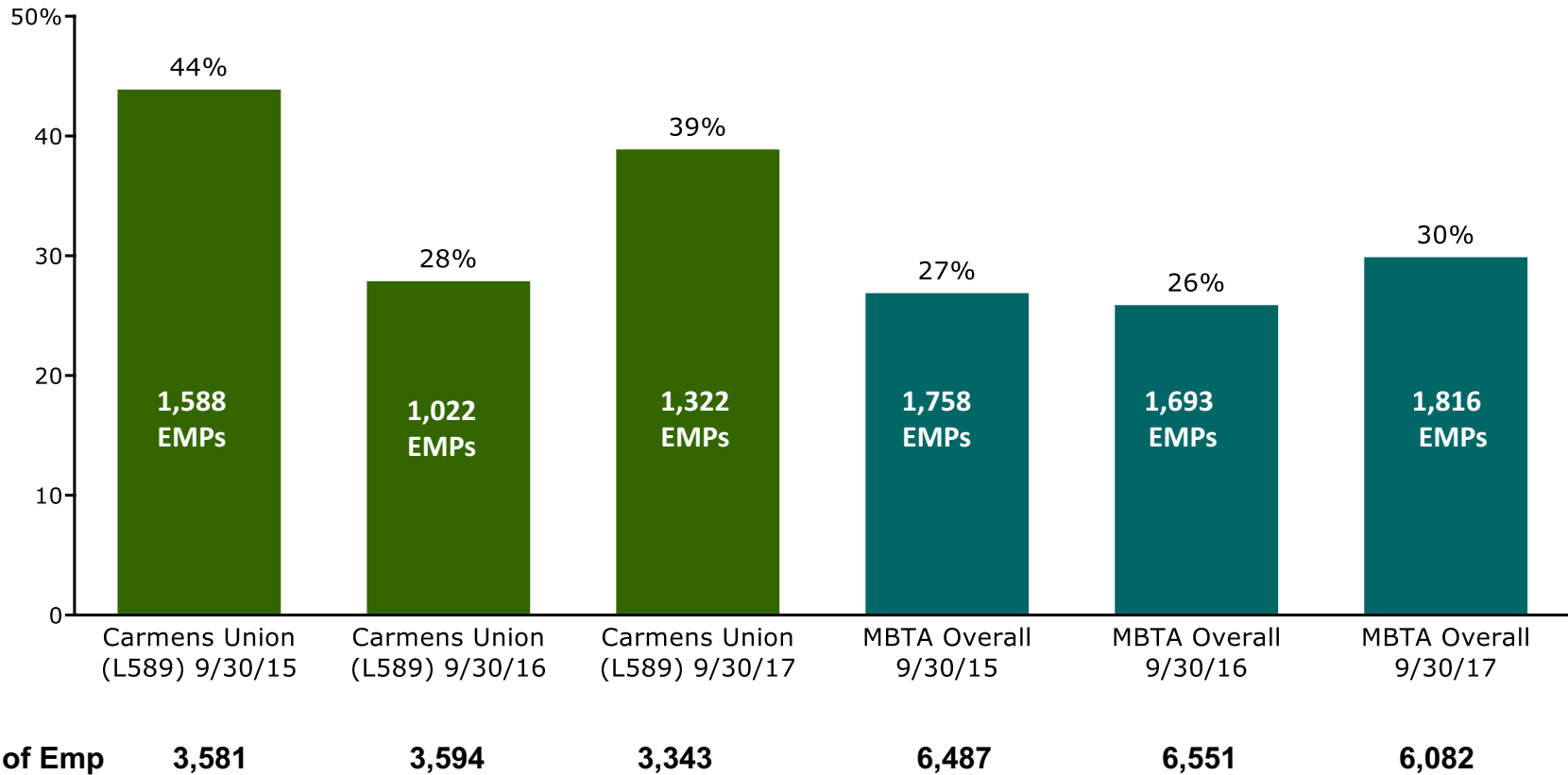
\*Now includes updated timekeeping data from PeopleSoft 9.2

Source: Internal MBTA data



## Number of Employees with FMLA certifications shows a slight increase over same time last year

**% of Employees with Active FMLA Certification**

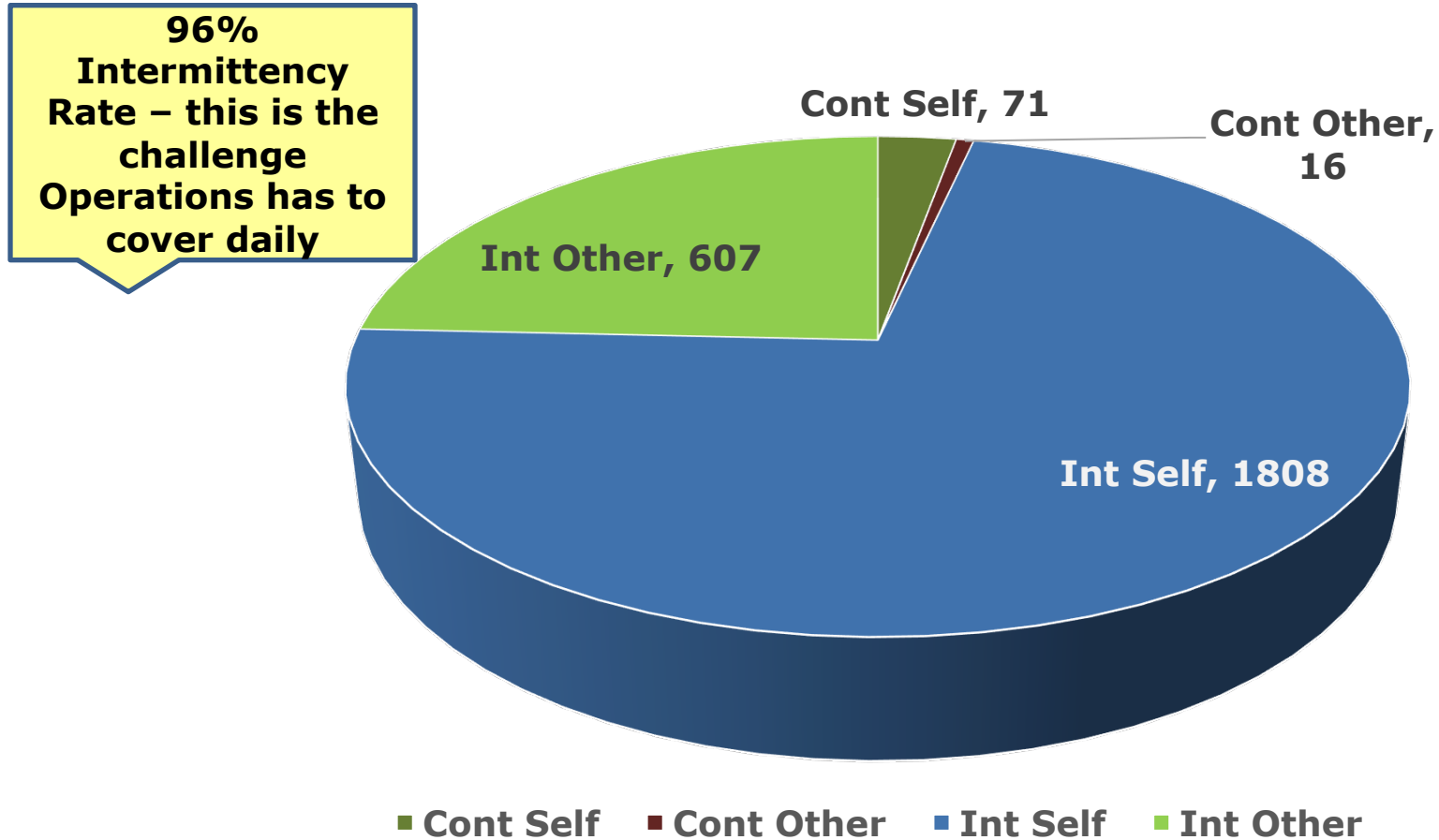


Source: Internal MBTA data



## Intermittent FMLA leave for employee's own health conditions account for 72% of approved leaves

Total Approved FMLA Certifications: 2,502

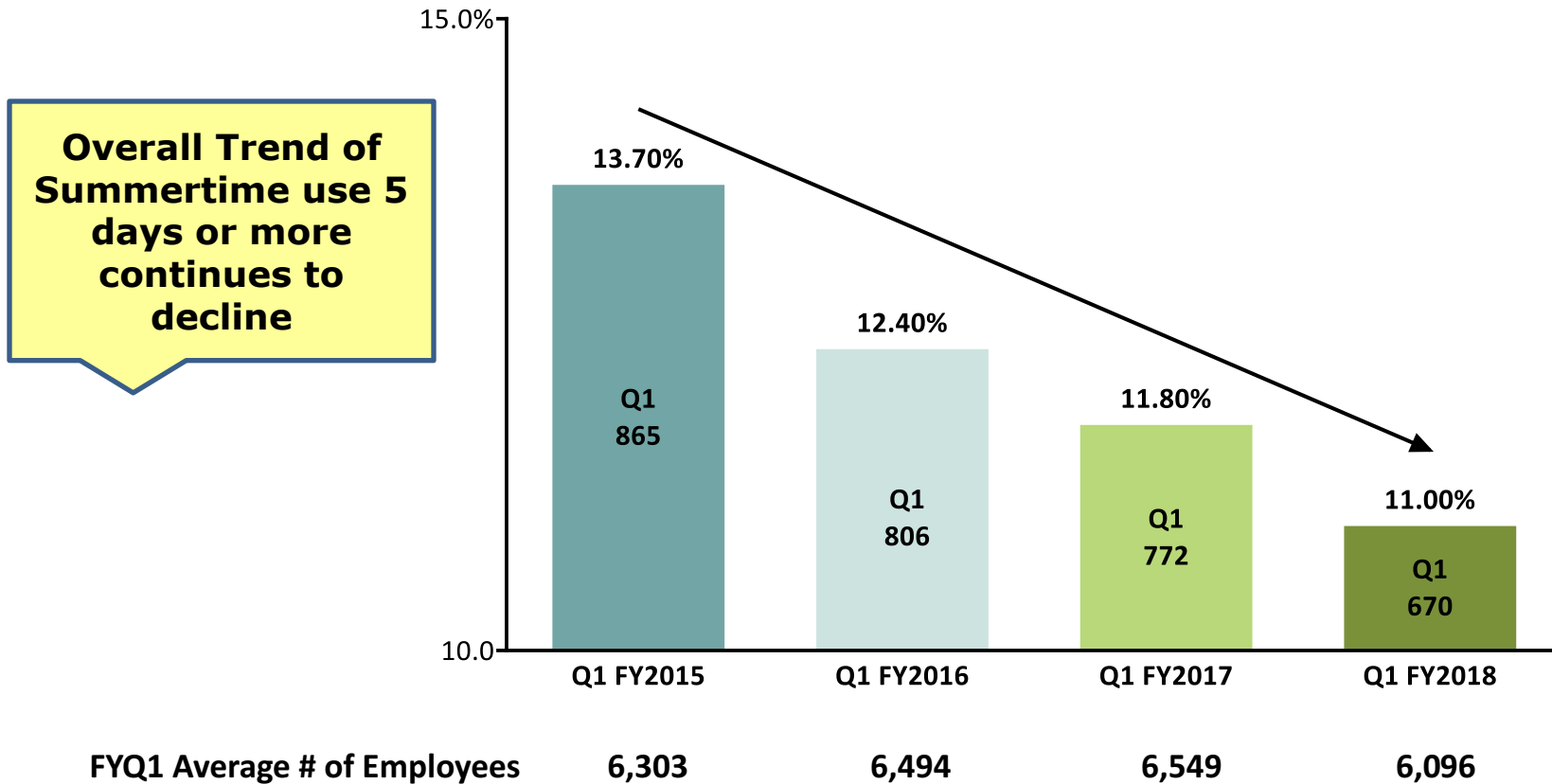






## FMLA Usage of 5 Days or More

% of Total MBTA Employees Using 5 or More Days of FMLA

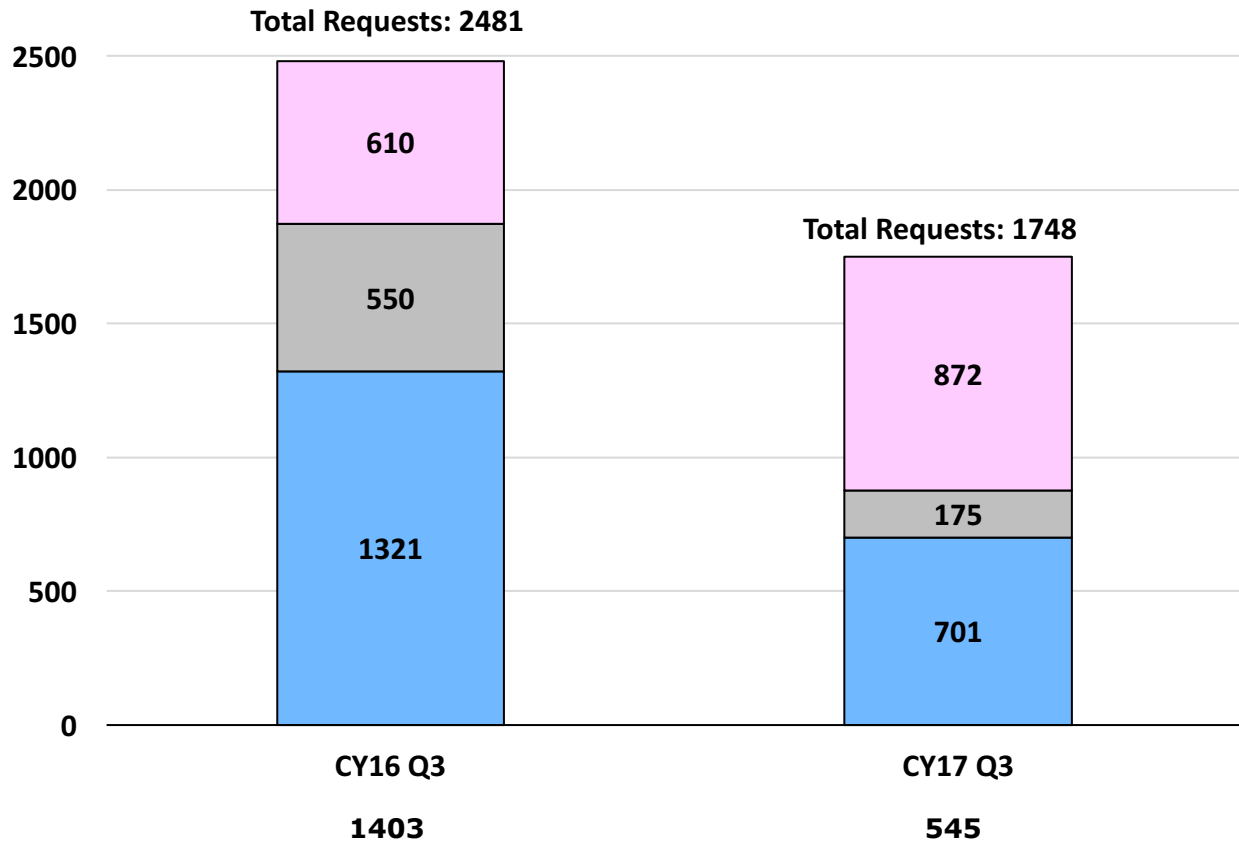




## Q3 Caseload (Requests vs Determinations) Comparisons

The percentage of “Pending” requests went from 22% to 10% and the percentage of “Denials” went from 25% to 50%

- Approvals
- Other
- Denials





## TPA Leave Strategy – After the Full Organizational Roll-out

6

**Phase VI**  
**April – Oct 17**

- ✓ Full organizational roll-out complete
- ✓ Continued review of practices, policies
- ✓ On-going data integrity & reconciliation
- ✓ On-going reporting follow-up & evaluation of key metrics

**Completed  
& On-Going**

7

**Phase VII**  
**Oct – Dec 17**

- ✓ Return-to-work
- ✓ Excess Use for Intermittent – Recertification

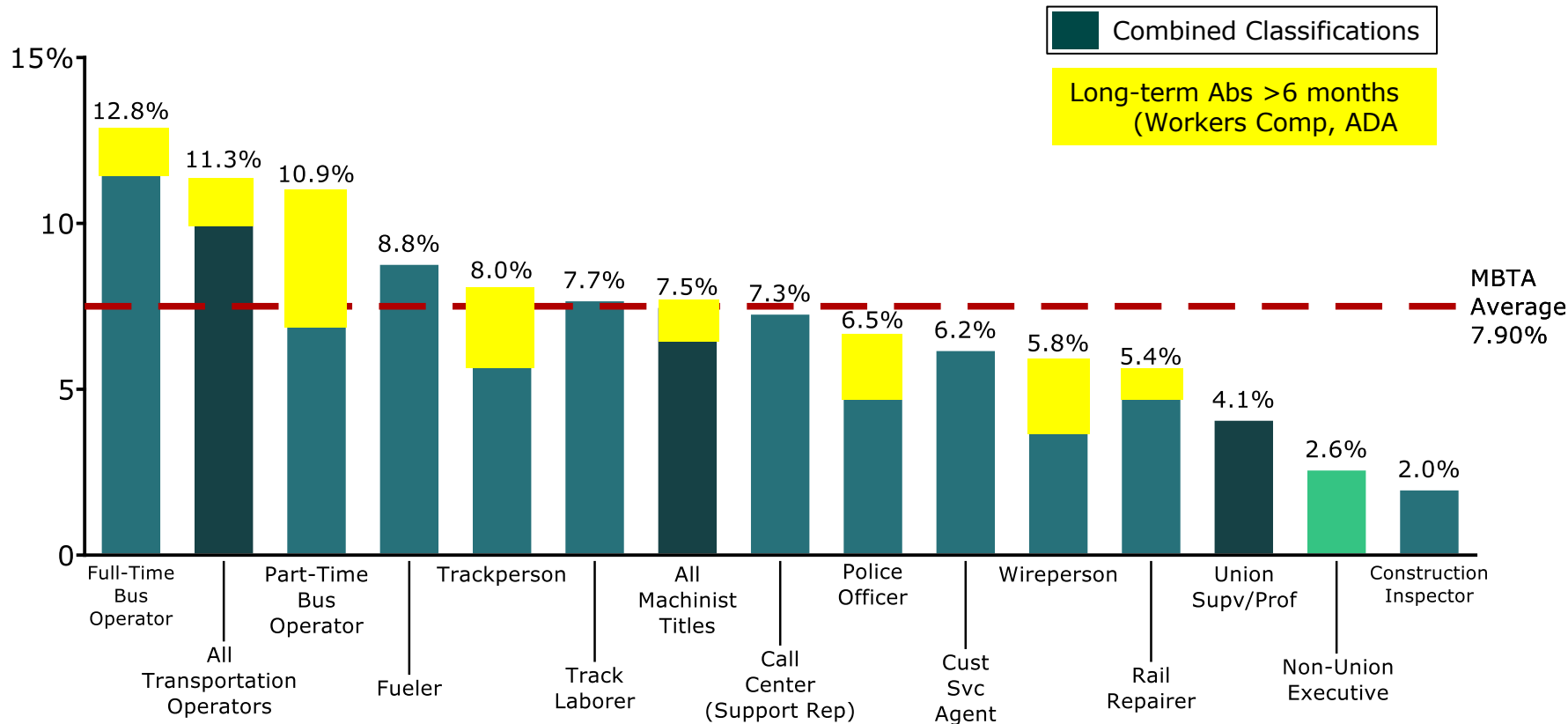
**On-Going**



## 2017 Q3 update – absenteeism by classification

MBTA Unscheduled Absence %

(Unscheduled Absence - we don't have headcount budgeted to cover (WC, FMLA, ADA, Unexcused Absence, Lost License)



# Employees	1,340	2,457	367	62	76	58	322	6	203	107	150	313	544	245	44
<b>Long-term Abs</b>	1.4%	1.8%	3.9%	0%	2.7%	0%	1.9%	0%	2%	0%	2.7%	1.3%	0%	0%	0%

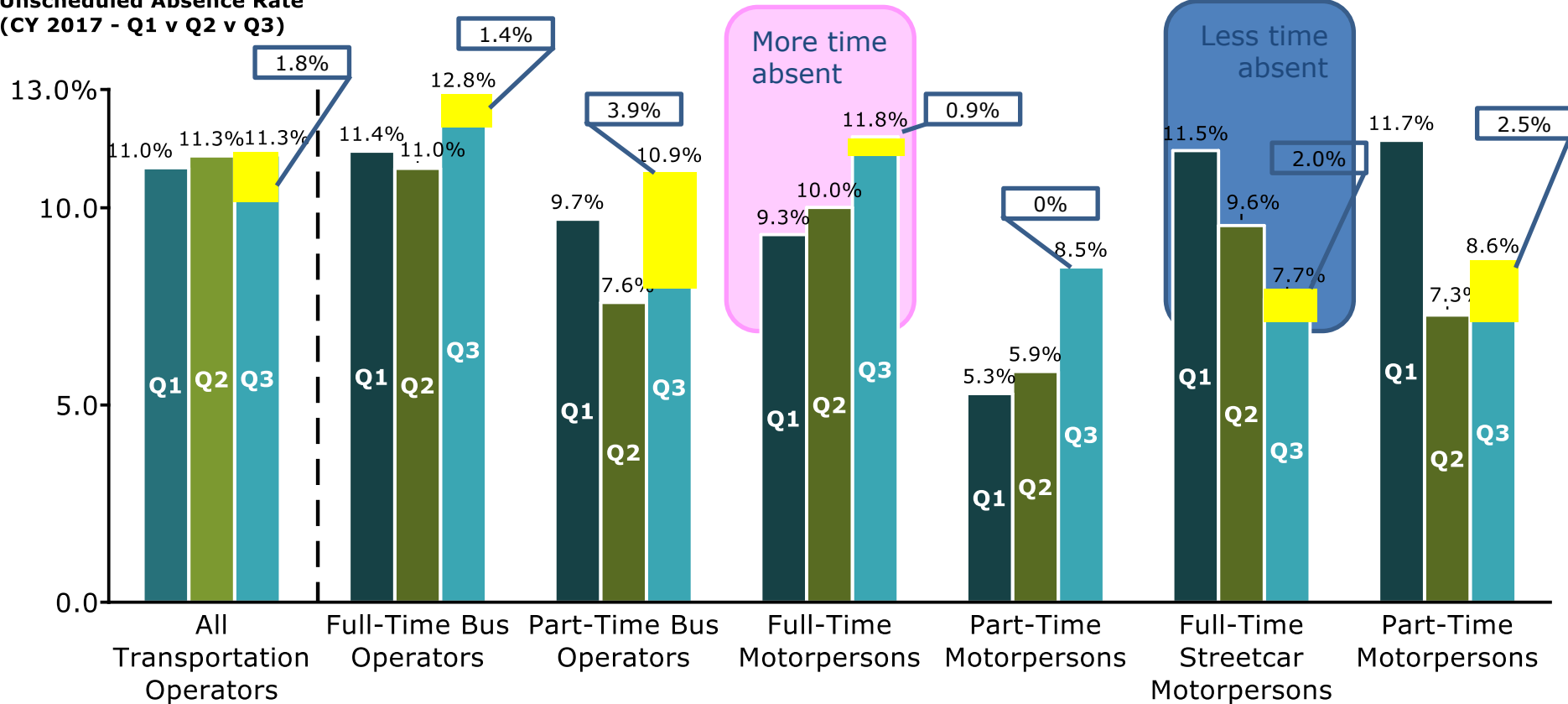
Source: MBTA Internal Data

Draft for Discussion & Policy Purposes Only



## Transportation Operators: Absenteeism Rate reduced in all titles except for FT Motorpersons in Q2

Unscheduled Absence Rate  
(CY 2017 - Q1 v Q2 v Q3)

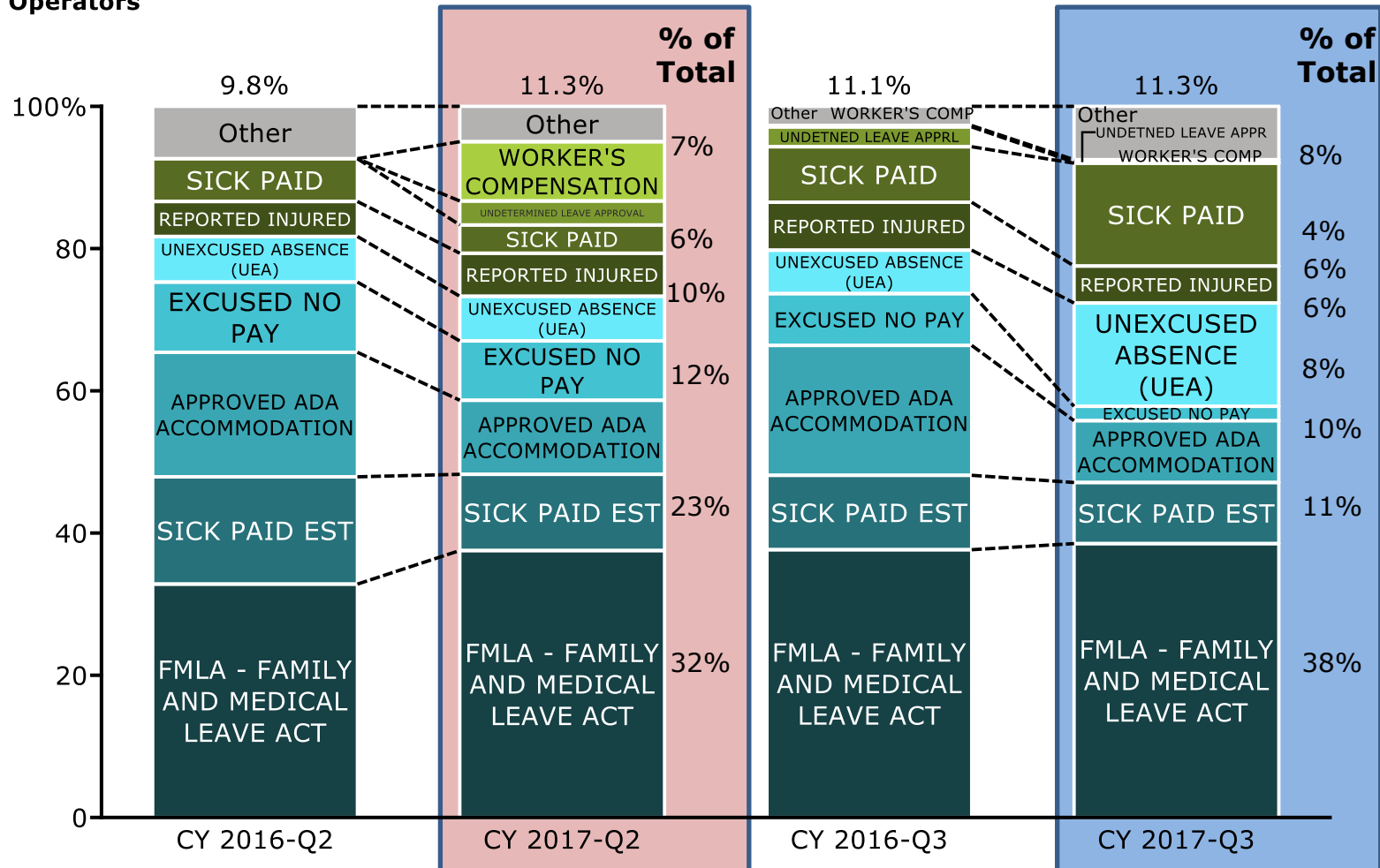


<b>Avg. HC Q3</b>	2,457	1,340	367	211	57	399	80
<b>Avg. HC Q2</b>	2,460	1,349	357	205	50	409	90
<b>Avg. HC Q1</b>	2,498	1,356	365	203	60	417	97



## ADA usage dropped in Q3-16v17, Sick Paid & Unexcused Absence grow

Unscheduled Absence Rate -- All Transportation Operators



Source: MBTA Internal Data

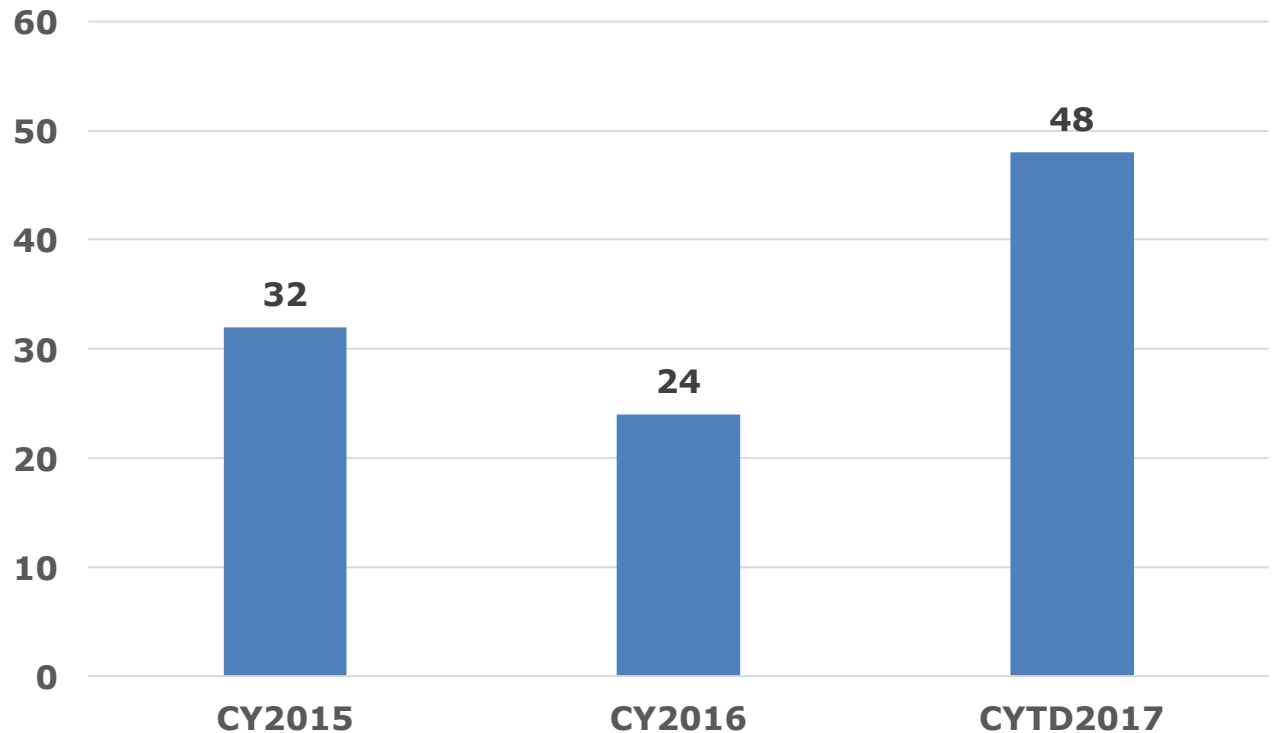
Draft for Discussion & Policy Purposes Only



## Annual Terminations for Violations of Attendance Policy

**We are enforcing our attendance policies better than we did in the past several years**

Terminations in Q3: **7**

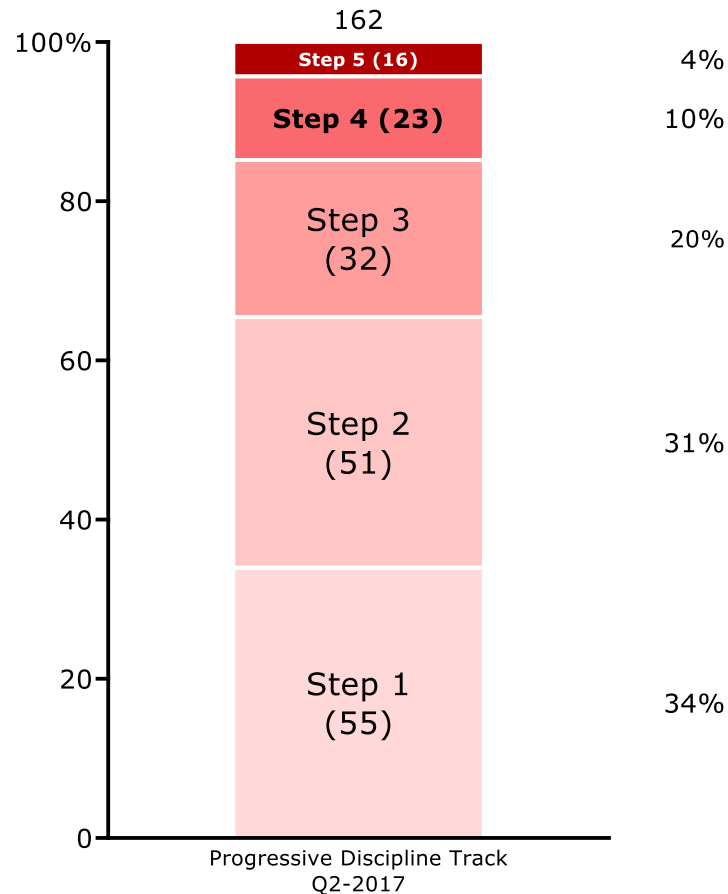




## More than 70 employees are currently in steps 3, 4 and 5 of progressive discipline for violating attendance policy during Q3 of 2017

Number of Employees on Progressive Discipline Track for Attendance Violations

**% of Total**



### **Discipline Steps**

- Step 5:** 70-day suspension with RFD
- Step 4:** 5-day suspension time-served
- Step 3:** 3-day administrative suspension
- Step 2:** 1-day administrative suspension
- Step 1:** Written warning



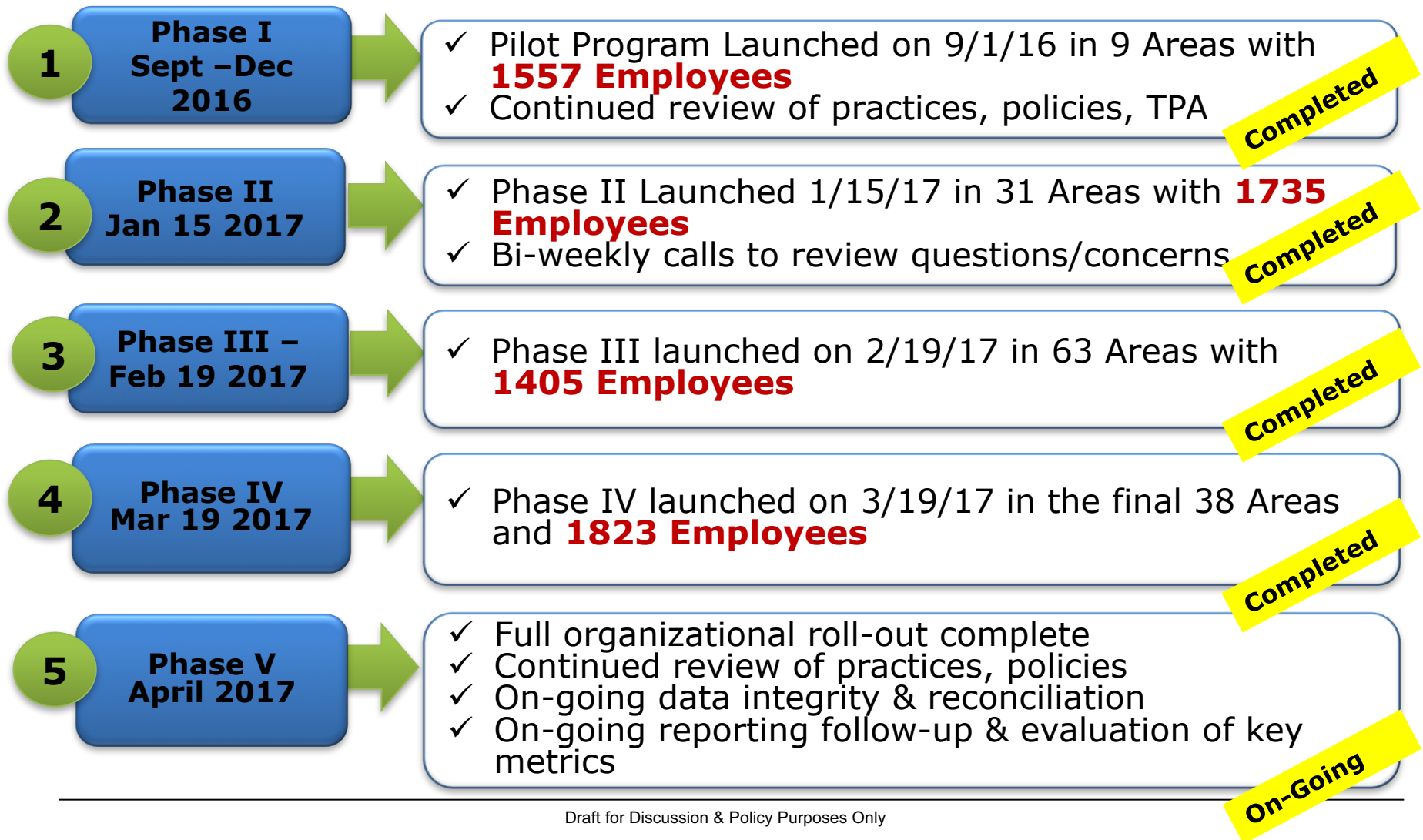


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# APPENDIX



## TPA Leave Strategy – UPMC WorkPartners





# More days used in Q3 of 2017 but less number of employees

MBTA 360 Heat Map of FMLA Ratio over Calendar Days - ALL MBTA

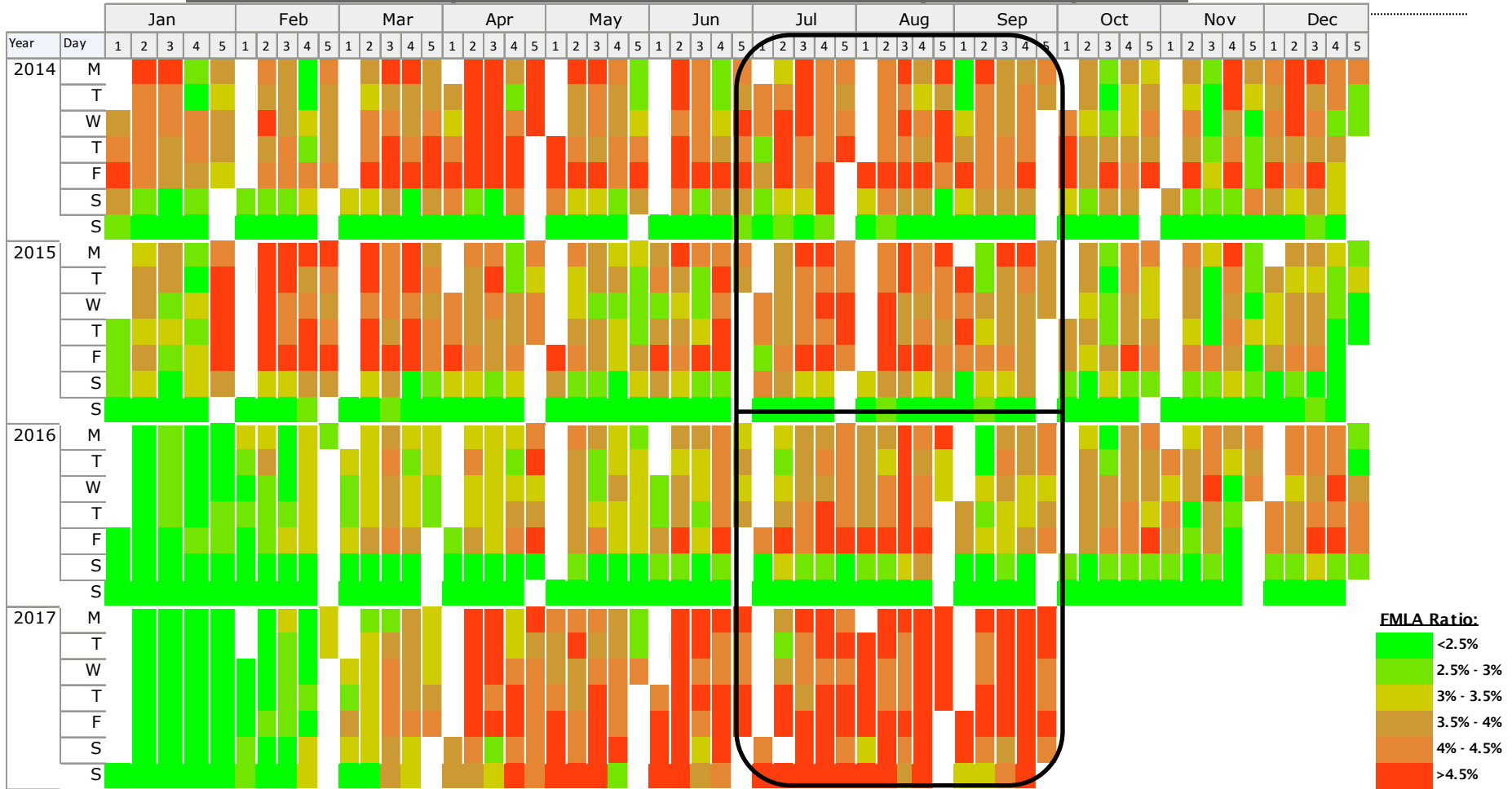


**FMLA Ratio:** Total # of FMLA days used/Total number of working days.



# More days used in Q3 of 2017 but less number of employees

## MBTA 360 Heat Map of FMLA Ratio over Calendar Days-Trans Operators

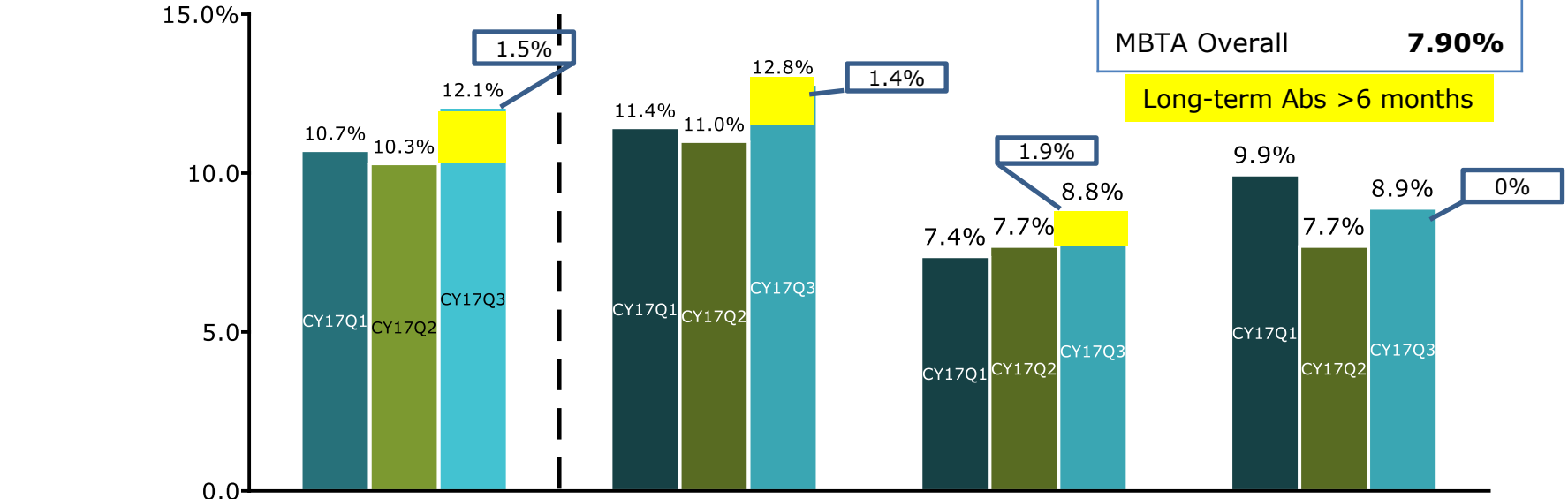


**FMLA Ratio:** Total # of FMLA days used/Total number of working days.



## Bus operations and maintenance (combined) absenteeism rate was 12.1%

**Unscheduled Absence Rate  
(CY 2017 - Q1 v Q2 v Q3)**



Union Affiliation	Combined	Full-Time Bus Operators L589	Bus Machinists L264	Fuelers L264
<b>Avg. Headcount Q1</b>	1,699	1,356	278	65
<b>Avg. Headcount Q2</b>	1,688	1,349	275	64
<b>Avg. Headcount Q3</b>	1,637	1,340	236	61

Note: "Bus Machinists" includes machinists at bus garages (067400 and 067600), as well as Everett Automotive Machinists (057100)