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MTF Bulletin

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Ticket to Transformation? Evaluating the MBTA's Efforts to Bolster its Workforce

Introduction

Workforce challenges at the MBTA have received extensive reporting in recent years. Those challenges took on a new sense of urgency in 2022 when a safety management inspection by the Federal Transit Administration (FTA) found that the MBTA needed to expand the size, training, and supervision of its workforce so that it could operate, maintain, and deliver capital projects safely.

While the FTA's findings joined a chorus of other stakeholders noting the impact of staffing shortfalls, they alone have the authority to oversee and enforce public safety for all transit systems that receive federal funds under the Urban Area Formula Grants. Failing to address the FTA's findings will stymie a recovery at the T, diminish the rationale for substantial new resources, and put Boston's economy at risk.

The stakes could not be much higher.

In response to the Federal Transit Administration's 12 special directives, the MBTA estimated it needed an increase of 2,000 personnel in its operating budget in Fiscal Year (FY) 2024 (from 5,600 in June of 2022 to 7,600 by June of 2024). Despite clear progress to date, the Authority confronts a number of obstacles to maintain, let alone expand, employment levels.

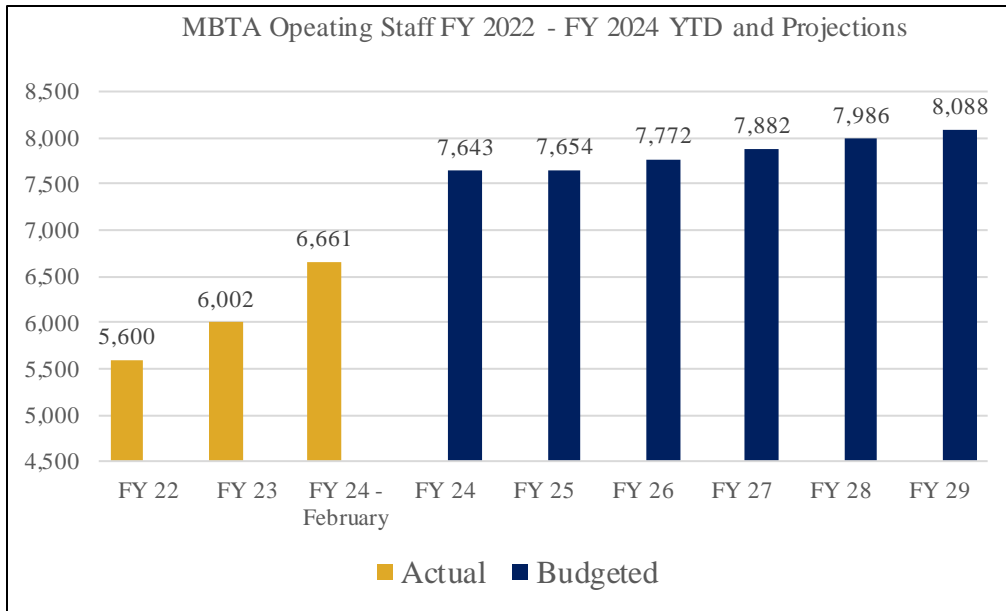
The MBTA is developing a workforce analysis that should be released this summer. The plan, also mandated by the FTA, will provide a blueprint of the staffing requirements "to determine the level of operations, maintenance, and capital project delivery that its workforce can sustain, particularly in key technical, supervisory, and engineering positions."

This brief provides an overview of the MBTA's hiring efforts over the last year and assesses progress in specific areas of need. As demonstrated by data limitations in the analysis below, it is clear the MBTA's upcoming staffing analysis needs to include a detailed assessment of the progress to date while offering a more accurate count of employees needed to meet the MBTA's service and safety goals.

Results To Date Are Promising

To achieve the additional 2,000 goal in FY 2024, the MBTA incorporated a series of employment initiatives and financial incentives to increase hires and limit departures; and those initiatives appear to have had an impact. As shown in the table below, total MBTA staff has grown by 1,061

to a net of 6,661 through February 2024, demonstrating substantial improvement over previous hiring campaigns.



If the MBTA’s hiring results continue at this pace (averaging 91 net new hires per month), the Authority could achieve its FY 2024 budgeted headcount of 7,643 by the end of calendar year 2024. The spotlight then necessarily shifts to maintaining that staff level, including ensuring the Authority has sufficient financial resources to meet staffing needs in FY 2026 and beyond.

Despite the progress to date, considerable obstacles remain to meet and maintain the MBTA’s staffing goals. To understand those challenges, it is important to understand how the MBTA got to this point.

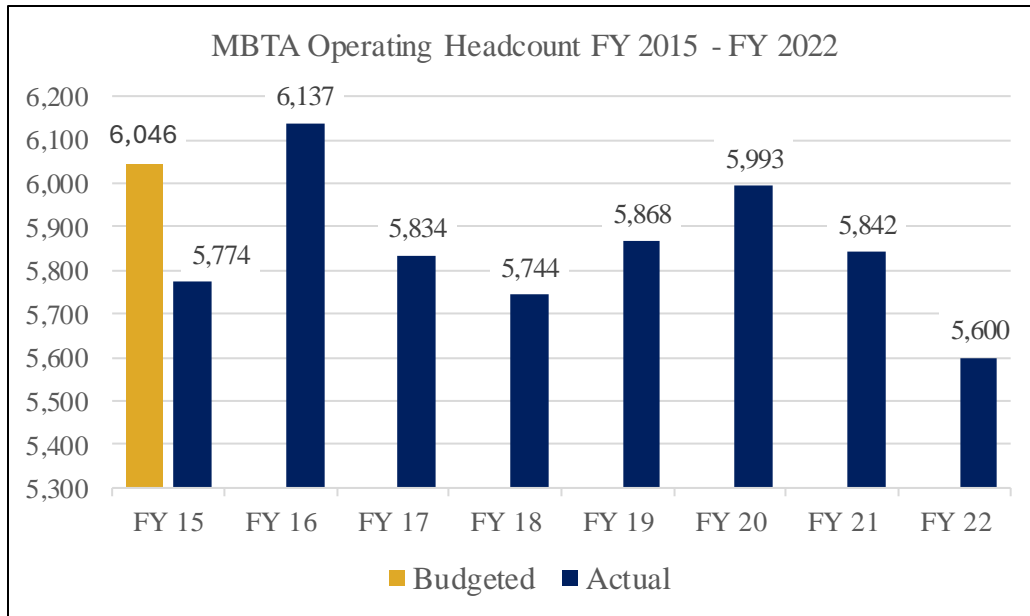
How did the MBTA’s Workforce Shortage Develop?

The MBTA’s operating headcount has fluctuated since FY 2015 with gains in FY 2016 followed by two years of decline, two years of gains, and then another two years of decline.

The swings in headcount were caused mainly by operating budget shortfalls. Limited revenue growth coupled with increased expenses created budget gaps in FY 2017 and FY 2018, which led to a hiring freeze and a voluntary retirement incentive program. The Safety Review Panel explained the costs of this strategy in its 2019 report:

...the hiring freeze and reduction in headcount was exacerbated by the most seasoned and knowledgeable employees accepting management sponsored “buy outs” that resulted in significant brain drain. With no clear succession planning or employee development processes in place, the organization finds itself limited in its ability to effectively run the system. Without even

realizing it, a safety culture gets formed; unfortunately, it is one of poor operational performance and neglect of infrastructure assets.¹



Following the Safety Review Panel’s report, the MBTA made a concerted effort to hire safety personnel and saw an increase in headcount to nearly 6,000 in FY 2020. Then COVID struck, and an independent arbitrator’s proposed changes to pension benefits in 2022² pushed many union members to retire, driving up the number of departures.

A series of safety incidents and an overwhelming number of vacant positions forced the FTA to intervene in MBTA operations in 2022. Chief among the FTA’s findings was that the Authority was woefully understaffed and incapable of operating the system safely. The FTA issued 7 findings and 13 required actions tied to workforce staffing and training.

Responding to the FTA – Workforce Hiring Progress is Murky

The FTA focused its investigation on the MBTA’s rail system including vehicle maintenance, signals, track access, track conditions and power, facilities, training, and safety management, among other concerns. It found that key technical and supervisory positions had vacancy rates between 20 and 35 percent, including Operations Control Center (OCC) dispatchers and supervisors, signal technicians, vehicles repairers, traction power technicians, and track repairers for heavy and light rail vehicles.³ The FTA further found that the average vacancy rate across the Authority in FY 2021 and FY 2022 exceeded 12 percent.

¹ Safety Review Panel Final Report, October 2019, p. 34.

² The arbitrator proposed that those under the age of 60 would wait until 65 before they could collect a full pension, up from the current plan’s requirement of 55 years of age with 25 years of service. Further, pension payments would be reduced by 6 percent per year for each year before 65. The MBTA and the Boston Carmen’s Union Local 589 subsequently rejected the arbitrator’s decision.

³ Special Directive No. 22-9, Required Actions to Address Findings from the Federal Transit Administration Safety

Estimated Additional Staff	
Budgeted Vacancies	1,088
FTA Directives	550
Safety & Training	125
Bus Network Redesign	125
Green Line Extension	75
Fare Transformation	37
Estimated Total	2,000

The MBTA estimated that it would need to increase staffing to its operations by 2,000 personnel in order to satisfy FTA directives, as well as several Board approved initiatives that had additional staffing implications. That 2,000 figure is primarily comprised of four main components: staff to fill open vacancies; additional personnel for FTA safety matters; new personnel to provide maintenance at bus facilities and stations that were not included in the FTA’s investigation and to enhance training capacity for new hires; and new staff to support the Bus Network Redesign initiative, the Green Line Extension, and the new fare collection system.

In sum, the 2,000 personnel are for existing safety requirements and approved initiatives. This additional hiring does not include new staff for expanded services.

Breaking Down the Headcount Numbers

The MBTA provides regular updates on the top-line numbers of hiring and departures as well as the number of bus operator hirings and vacancies. Beyond these statistics, changes in headcount and vacancy rates of positions cited in the FTA’s Safety Management Inspection Report are unclear. More information on these specific positions should be available when the MBTA releases its workforce assessment plan this summer with staffing levels for key positions cited by the FTA.

To get a deeper look at key areas of FTA concern, MTF relies on MBTA payroll data from CTHRU to provide some insights.⁴ While the results may lack the desired precision, the year-to-year changes in key positions are helpful in measuring progress.

Our analysis highlights key staffing areas highlighted by the FTA as well as key areas of MBTA staffing focus. This includes bus and rail operators as well as filling vacancies in the Operational Control Center (OCC), including dispatchers and supervisors, signal technicians, vehicle repairers, traction power technicians, and track repairers for heavy and light rail vehicles,

Operators

Operators are the front line of service delivery, and shortages in both bus operators and motorpersons have contributed to reduced service levels over the past couple of years. The MBTA has increased compensation for operators that includes a sign-on bonus of up to \$7,500 for bus and heavy and light rail operators reflecting the importance of recruiting these front-line personnel.

The bus operator data shows a growing shift from part-time to full-time operators since 2019, an intentional part of the recruitment effort to make the position more attractive. Additionally, MBTA workforce reports on bus operators, presented to the Board each month, state that vacancies in February 2024 declined to 153⁵ from 368 in July 2023.

Management Inspection Conducted at the Massachusetts Bay Transportation Authority – Related to Managing the Impact of Operations, Maintenance, and Capital Project Requirements on the Existing Workforce, p.2.

⁴ CTHRU provides payroll data for all permanent, temporary, and contract employees for state agencies, constitutional offices, and independent agencies including the MBTA. The payroll data are updated bi-weekly. Office of the Comptroller, see [MBTA statistics](#). Note: the CTHRU data are for calendar and not fiscal years.

⁵ Includes those in training.

Bus	2019	2020	2021	2022	2023
Operator Surface	1,555	1,518	1,524	1,695	1,714
Operator PT Surface	507	455	421	354	311
Operator Surface TRG	252	189	112	228	157
Operator Total	2,314	2,162	2,057	2,277	2,182

CTHRU data show strong hiring gains in the number of full-time and part-time motorpersons for heavy and light rail since 2021. However, training programs for new motorpersons have not received the same attention as expanded programs for bus operators. This is important because the FTA found that motorpersons do not have access to experienced personnel due to high turnover and called on the MBTA to expand and enhance a mentoring program for newly hired motorpersons.

Rail	2019	2020	2021	2022	2023
Motorperson Rapid Transit	258	240	236	262	280
Motorperson PT	86	74	44	34	59
Motorperson P-T TRG	62	54	40	60	96
Motorperson Streetcar	434	421	419	502	533
Motorperson P-T Streetcar	127	111	119	178	213
Motorperson P-T Streetcar TRG	55	49	56	129	204
Motorperson Total	1,022	949	914	1,165	1,385

Rail Dispatchers

The MBTA states that it would be best served with 27 full-time dispatchers and 5 back-up dispatchers for a total of 32. In one of its four urgent special directives ([22-6](#)), the FTA found that the OCC was understaffed, worked excessively long shifts, and performed both dispatcher and supervisory work on the same shift. At the time, the FTA forced the MBTA to reduce heavy rail services until these workforce matters were corrected.

The T's latest presentation of dispatcher hiring data to the Board was in October 2023, and it showed no progress in this critical category over the previous six months as applicants have diminished. While the MBTA states that the number of dispatchers does not now limit services, the shortfall provides minimal flexibility and could restrict safe and reliable services going forward, suggesting that updates should be reported regularly.

Rail Yards Safety

In addition to OCC staffing issues, one of the four urgent special directives ([22-5](#)) cited rail car uncoupling in rail yards, with several runaway trains, rule violations when moving trains into rail yards, and the inability to support key operating and maintenance procedures in rail yards.

As is evident in the table below, the MBTA made significant increases in the number of rail yard motorpersons in 2022, most certainly to respond to the many cited rail yard safety matters.

Rail Yard	2019	2020	2021	2022	2023
Motorperson RTL Yard	36	39	38	39	49
Motorperson P-T RTL Yard	74	69	65	97	66
Motorperson Spare RTL Yard	7	11	11	18	40
Motorperson RTL Yard Total	117	114	114	154	155

Track and Vehicle Maintenance

The FTA found that nearly 10 percent of the MBTA’s heavy rail service on the Red, Orange, and Blue Lines was under speed restrictions, as well as two miles of the Green Line. The MBTA was also directed to improve maintenance of way (MOW) access times, workload of staff, and maintenance needs.

In light of these and other needs, the MBTA is offering a sign-on bonus of up to \$7,500 targeting service technicians, rail repairers, track laborers, and fuelers. The table below shows important progress in headcount to address the myriad of track and vehicle-related issues the FTA identified.

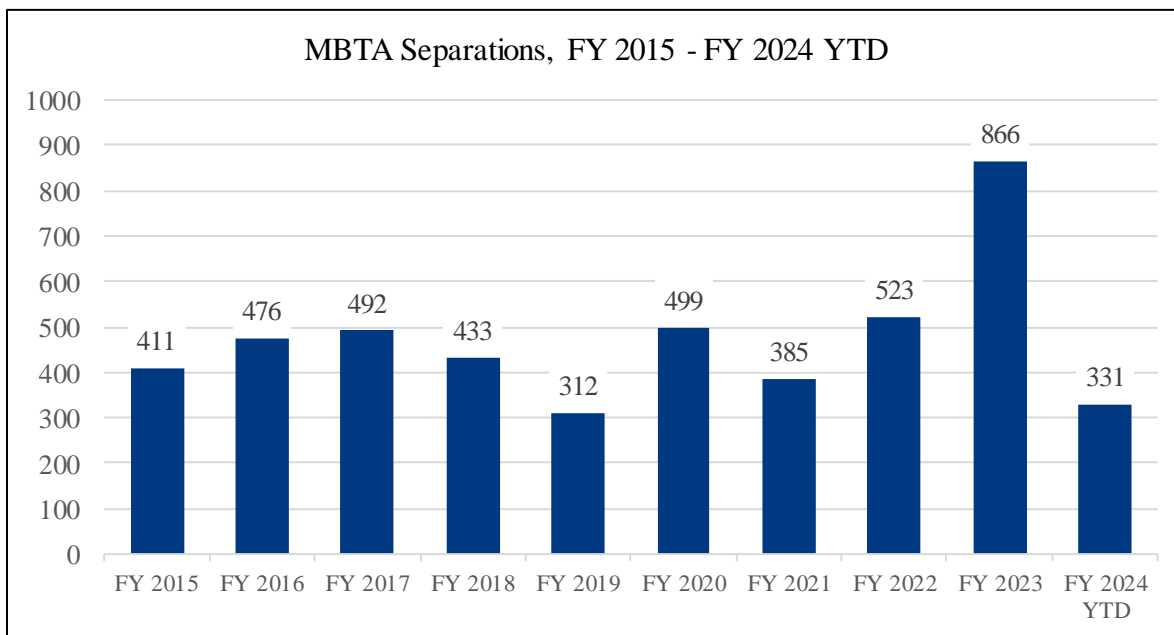
Track and Vehicles	2019	2020	2021	2022	2023
Repairer Rail	328	319	312	325	336
Laborer Track	119	113	106	92	157
Trackperson	90	82	81	87	104
Service Technician	224	215	203	201	257
Fueler	89	65	68	74	112
Tech Rail Veh. Maint.	0	0	0	33	44
Engineer	79	80	78	77	91
Subtotal	929	874	848	889	1,101

Adding it all Up

The MBTA has made significant progress in its workforce development to date. It expects to end FY 2024 with approximately 7,100 employees, putting it on a path to reach the 2,000 net new headcount goal by the end of the calendar year.

However, many risks remain ahead. Progress in filling key positions to address FTA-directed safety measures, which are critical to the MBTA’s turnaround in service safety and delivery, is unclear.

The MBTA must also not take future progress for granted. Worryingly, there were 866 separations from the agency in FY 2023, the highest total to date, of which 579 were not retirement-related. Despite financial incentives that helped staunch separations over the past several months, it's worth noting that there are approximately 800 MBTA employees (12 percent) currently eligible for retirement. Maintaining recent headcount gains could require even higher hiring totals should departures return to FY 2023 levels.



Budgetary gaps are also of critical concern. Financial incentives used by the MBTA to recruit, train, and retain personnel have driven up long-term operating costs. For example, the new collective bargaining agreements increased wages by 18 percent over four years, adding more than \$100 million to annual expenses. Taken together with anemic revenue growth, the MBTA faces years of ever-widening budget gaps.

Robust hiring to meet and maintain staffing levels, the upcoming workforce assessment plan that could drive operating costs even higher, and the pursuit of hundreds of millions in resources to balance next year's budget will keep stakeholders' attention on the embattled Authority as it attempts to recover from decades of neglect.

Key Questions

- **Can the MBTA add and train another 1,000 personnel to its operations, and will it result in the elimination of slow zones and a return to full, reliable service by the end of 2024?**

Fixing slow zones requires a substantial increase in key personnel to repair and upgrade signals, track conditions, power, and facilities. The MBTA also needs to expand its training capacity and management of safety systems. Absent these hiring gains, planned repairs could slip into 2025, causing more disrupted services while diluting employers' and riders' faith in the MBTA's recovery.

- **If the MBTA falls short of its hiring needs as reflected in the upcoming workforce assessment plan, what actions could the FTA take?**

The MBTA's workforce analysis will likely include a range of service levels tied to specific headcount numbers. The FTA imposed service restrictions before and could intervene again to direct the MBTA to deliver the level of service tied to the workforce assessment and actual headcount data.

- **If the workforce assessment plan's net headcount exceeds the current 2,000 estimate, does it materially affect the MBTA's hiring goals, its repair and maintenance schedule, or its FY 2026 operating budget?**

It is possible that the workforce analysis exceeds the 2,000 estimated headcount goal for full service on the current MBTA system, which would necessitate additional hiring and training, as well as higher operational costs. If so, the \$700 million FY 2026 budget gap could be higher.