

BART STRATEGIC PLAN

A NEW ERA OF PARTNERSHIP

ADOPTED 1999

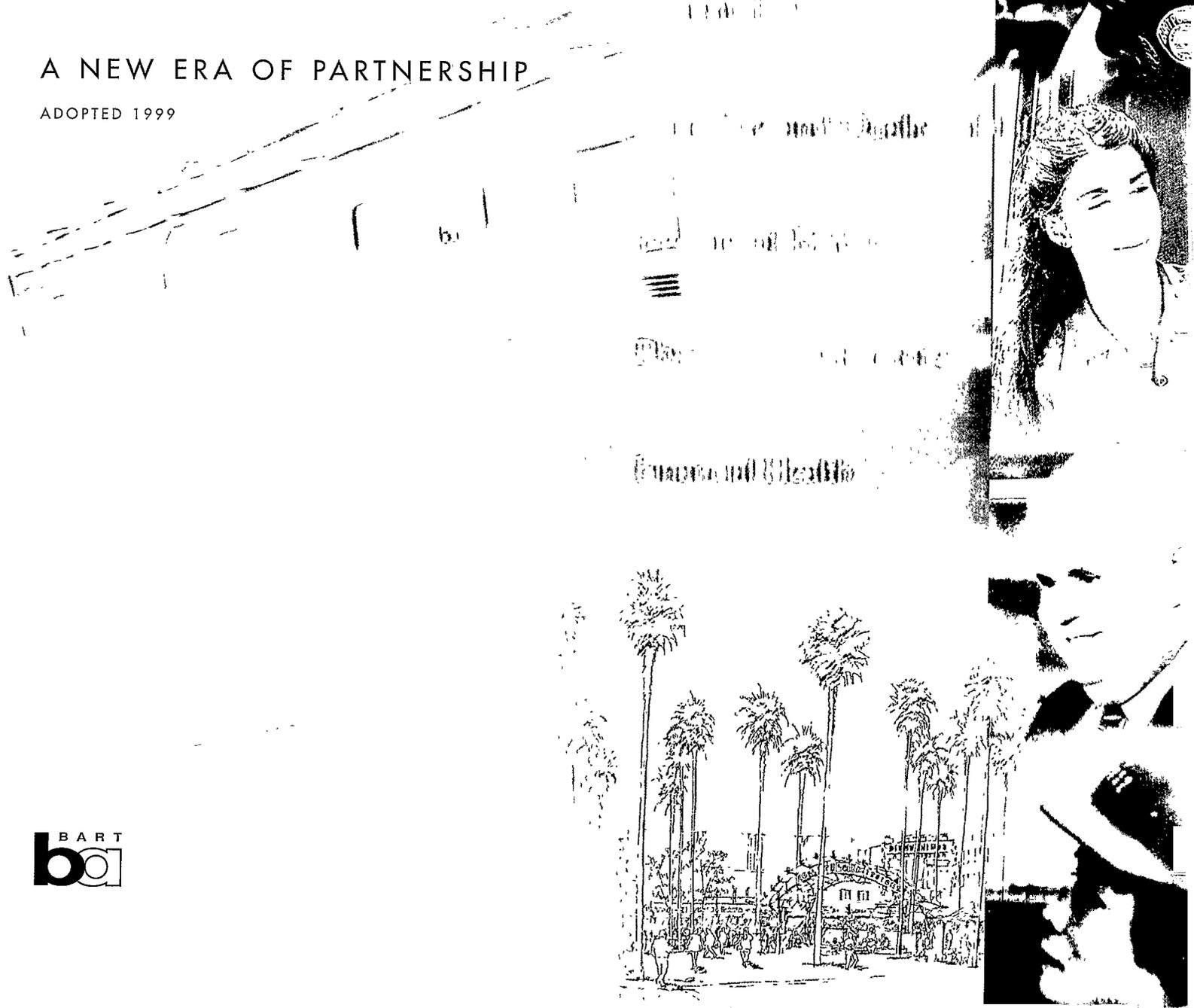


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A MESSAGE FROM THE BART BOARD OF DIRECTORS

In 1996, BART's Board of Directors launched an effort to develop a new strategic plan to guide BART into the 21st century. Development of this plan included data analysis, assessment of past trends and future projections, and considerable input from BART's stakeholders, including employees and transit customers. The resulting plan, summarized in the pages that follow, was ratified by BART's Board in February 1999.

For more than a quarter of a century, BART has been a vital part of the Bay Area's transportation network. BART's rapid transit service has increased the mobility and prosperity of Bay Area residents, and has made a significant contribution to the region's environment and overall quality of life. But today BART faces a number of critical issues, including a fast-growing need for system rehabilitation, shifts in regional growth patterns that affect transit priorities, changing customer expectations, and new funding dynamics. BART's new strategic plan provides a solid platform for making decisions and taking action on these and other issues that will profoundly affect our future success.

The new BART strategy is built on a clear mission and vision of our role in Bay Area transit, which you will find detailed on page 4. In brief, our aim is to provide safe, clean, reliable and customer-friendly rapid transit service, and to be both an effective leader and partner in efforts to improve "seamless" delivery of public transportation services. Our plan focuses on seven key issues that are central to this mission, and identifies goals, objectives, and strategies for achieving results in each area. At the heart of the plan is a new emphasis on both internal and external collaboration to reach critical goals more quickly.

Those of us who are entrusted with the operation and management of BART recognize that we oversee an invaluable public asset. BART's future success requires us to be both proactive and responsive in a dynamic environment that continues to change rapidly. Our new strategic plan is not meant to provide all the answers, but to set clear priorities and directions as we attempt to meet the evolving rapid transit needs of Bay Area residents.

We encourage you to read this document, ask questions, and support BART's vision of providing efficient, friendly transit service for years to come. Your commitment to BART's success is an essential ingredient in our quest to meet the challenges of the new century.

Dan Richard
President, 1999
Co-Chair,
Strategic Planning Committee, 1998

James Fang
President, 1998

Peter W. Snyder
Co-Chair,
Strategic Planning Committee, 1998
Chair,
Strategic Planning Committee, 1999

Members of the Board: Thomas M. Blalock, James Fang, Joel Keller, Willie B. Kennedy, Roy Nakadegawa, Tom Radulovich, Dan Richard, Peter W. Snyder, Carole Ward Allen



Background

The Bay Area Rapid Transit system—"BART"—is the largest provider of mass public transit services in the Bay Area's complex transportation system.

Built 26 years ago at a cost of \$1.5 billion, the BART system today encompasses 39 stations and 95 miles of track in four densely populated Bay Area counties: Contra Costa, Alameda, San Francisco, and San Mateo. Each year, BART carries more than 81.1 million passengers to their destinations. On typical weekdays, BART operates approximately 500 train cars to serve morning and evening commuters. On weekends, BART carries thousands of passengers to museums, restaurants, entertainment, and shopping centers across the Bay Area. With a long-planned extension to San Francisco International Airport underway, BART will enter a new era of service.

BART THEN AND NOW

The Bay Area has changed dramatically since the first BART train crossed beneath San Francisco Bay in 1975. The region's population has swelled by 37%, from 4.9 to 6.7 million people. A robust information-based economy has transformed Silicon Valley into the world's top job center for computer-related industries, and is quickly propelling the Bay Area to the top of the list for other knowledge-based industries.

As the region's jobs and population have increased, housing growth has extended far beyond the cities and suburbs that the BART system was originally designed to serve. Today, two- and three-hour commutes by car are commonplace, and traffic is expected to worsen substantially as new suburban housing growth continues. According to a 1998 report by the Association of Bay Area Governments, the expanding distances between housing and other activities impose increasing hardships on those who do not drive.

Major changes in Bay Area growth patterns have changed BART's role accordingly. When BART was first built, many believed that the system would encourage job and housing growth along the corridors it served—effectively becoming the integrated transit system that the Bay Area needed. Today, however, BART does not reach many areas where the fastest job and housing growth is occurring, including Santa Clara County and parts of Contra Costa, Alameda, and Solano Counties.

A VISION FOR THE FUTURE

The reality of job, housing, and population growth patterns in the Bay Area cannot be ignored as BART assesses its future role as a Bay Area

The approaching new millennium is a catalyst for many organizations to consider their future. However, for the San Francisco Bay Area Rapid Transit District (BART) even more compelling reasons exist for planning ahead.

transit provider. As car use continues to increase, BART's mission—to provide transit services that increase mobility and accessibility, and help preserve the Bay Area's environment and quality of life—has never been more relevant. But BART faces a number of challenges to achieving this mission.

Today BART serves the dynamic urban "core" surrounding much of San Francisco Bay and extending to nearby suburbs. BART's key focus has shifted in recent years from system expansion to increasing transit use in areas that the system already serves. Maximizing BART use will require far greater collaboration and partnership with other transit agencies that "feed" the BART system, and with cities where BART stations are located.

BART has also reached a key point in its history, where system expansion must be balanced against the fast-growing need for maintenance and rehabilitation of the current system's 26-year-old infrastructure.

To fulfill its mission of providing "safe, clean, reliable, and customer-friendly regional public transit" to Bay Area residents, BART also will focus on its workplace, increasing collaboration and teamwork, and providing new training and tools for employees. One of the challenges is accepting that "the way things have always been done" may no longer be the best or most efficient way to serve customers and improve the BART system in the future.

A NEW FOCUS

As part of its new strategic plan, BART identified seven key issues that will have a major impact on the system's future success. These issues are closely interrelated, and all point the way to improvements in BART service, responsiveness, and efficiency. Summarized below, each of these issues is presented in greater detail on the following pages.

The BART Customer Experience

BART exists to serve transit riders, and we will increase efforts to meet their needs. BART will build more effective partnerships with other transit agencies to provide "seamless" transportation services so that customers can move easily and quickly to destinations throughout BART's service area.

Building Partnerships for Support

The support of local communities and other transit agencies is essential to BART's long-term success. BART will work more closely with Bay Area communities and transit operators to build and strengthen support for customer-focused transit initiatives.

Customer Survey Results

BART regularly surveys its customers to identify ways to improve its services.

In 1998, BART learned that:

86% of BART customers would recommend BART to a friend or out-of-town guest

74% of BART customers are satisfied with BART services

Transit Travel Demand

Outside of commute hours, BART is underutilized. But the changing Bay Area economy and alternative work patterns offer new opportunities for increasing ridership. BART will work to maximize the use of the existing system—for example, by encouraging off-peak and reverse commute travel, and by improving station access.

Land Use and Quality of Life

BART stations attract economic development, but they also create new issues, including parking, safety, and traffic. BART will work in new partnerships with communities to integrate transit service with appropriate community development and with efforts to improve access and the quality of life in surrounding areas.

People of BART

The challenges facing BART today require partnership throughout the workplace and a renewed focus on reaching key goals. BART will increase investment in the support and development of all employees, and work to break down barriers to effective teamwork.

Physical Infrastructure

BART's physical assets—including trains, tracks, stations, and computerized systems—are invaluable, and could never be replaced in today's environment. BART will increase its focus on ongoing repair and maintenance of its existing system, in order to reduce system failures and improve service reliability.

Financial Health

The dynamics of transportation funding are changing, and competition for funding (including funds for maintenance and repair) is increasing. BART will focus on strategic partnerships and on long-term capital planning in order to protect the Bay Area's investment in rapid transit, and to assure the system's financial well-being and viability far into the future.

A New Era of Partnership

One of the chief lessons of the past decades has been that a strong regional public transportation network cannot be built without equally strong collaboration and partnership. The complex transportation needs of Bay Area residents have made it virtually impossible for one transit agency to "do it all." At the heart of BART's vision for the future is a new commitment to work in partnership with the different constituencies that BART serves, including local communities, other transit agencies, employees, and customers. BART will work to build:

- **Stronger community relationships.** As an economic partner in the communities it serves, BART will work to increase economic prosperity, serve the diverse needs of community residents, and improve the "livability" and vitality of areas where BART stations are located.
- **Stronger partnerships with other transit agencies.** BART's 39 stations serve many of the most traveled routes in the Bay Area—but how many more people might use transit if they could easily get to and from those stations to their ultimate destinations? BART will work more closely with other transit agencies to deliver the kind of service that not only BART customers, but all transit customers want.
- **Stronger partnerships within BART.** Better communication, common goals, and increased cross-functional collaboration is essential for achieving BART's mission, grasping opportunities, and building widely supported change strategies. We will tap the expertise of everyone at BART to serve our customers.
- **Stronger customer connections.** BART customers are a vocal and articulate constituency, but BART hasn't always been consistent about soliciting and responding to their input about desired improvements. BART is committed to gathering and using customer feedback to make tangible improvements in service and station amenities.

Organizational Mission & Vision

BART'S VISION STATEMENT

To be respected as a quality, regional public transportation resource and leader, with unique competencies in regional rail, indispensable to the livability and vitality of the Bay Area community.

In carrying out this vision BART will:

- Work with our transit partners to provide seamless, safe, and reliable service to people throughout the San Francisco Bay Region,
- Work together with other stakeholders to promote effective transit policies, initiatives, and service delivery across the region,
- Maximize ridership using the BART system's capacity to its fullest potential,
- Partner with the communities we serve to make investment choices and policy decisions which encourage, support, and enhance transit-oriented development and the increased use of transit,
- Be a professional, caring organization dedicated to meeting the needs of our customers and employees,
- Maintain our infrastructure and equipment in a condition that enables us to supply safe, reliable, high-quality, clean, and customer-friendly transportation,
- Know where we are and where we are going financially with capital and operating revenues and expenses which are balanced, predictable, stable, sustainable, and sufficient to meet our standards and goals.

BART'S MISSION STATEMENT

To provide safe, clean, reliable, and customer-friendly regional public transit in order to increase mobility and accessibility, strengthen community and economic prosperity, and preserve the environment in the Bay Area.



Strategy Focus Areas

Attainment of the organizational Mission and Vision requires successfully balancing the multiple facets of BART with the setting in which BART functions. These aspects of BART and its setting have been grouped into seven focus areas:

The BART Customer Experience. Listening to our customers and responding to their needs for efficient, integrated transit services.

Building Partnerships for Support. Focusing on partnerships with other transit agencies to support customer-focused transit initiatives and increased transit use.

Transit Travel Demand. Maximizing transit use by encouraging off-peak and reverse commute travel and improving station access.

Land Use and Quality of Life. Partnering with local communities to integrate transit services with development, improve access, and enhance quality of life in surrounding areas.

People of BART. Providing appropriate training and development for all employees and breaking down barriers to effective teamwork.

Physical Infrastructure. Sharpening our focus on the repair, maintenance, and renovation of our system to reduce system failures and improve service and reliability.

Financial Health. Protecting the Bay Area's investment in rapid transit through long-term capital planning and strategic partnerships.



VISIONS, GOALS, OBJECTIVES, AND STRATEGIES DEFINED

The following section contains the specific vision statements, goals, objectives, and strategies for each of the seven focus areas. In general, a vision defines the organization's aspirations as it looks to the future. A goal is a broad statement of what the organization wants to achieve in relation to a specific issue. In this context, the goal statements are supported by:

- a) Objectives—the measurable steps to achieve the goals, and
- b) Strategies—the alignment of people and resources necessary to achieve each objective.

The BART Customer Experience

VISION

The transit riders and residents of the San Francisco Bay Region will regard BART and its transit partners as providing seamless, safe, reliable, and customer-friendly transportation services and will consider themselves stewards of the system.



BART riders have many different reasons for choosing BART as their transit provider. They ride BART to avoid traffic congestion and long hours sitting in their cars. They also ride BART because it's more economical than car upkeep and the high cost of urban parking. In general, BART riders believe that service is reliable, and their overall experience of BART is quite positive.

BART riders do, however, share some common concerns. They cite the disrepair of escalators and fare collection equipment, and they also express concerns about public safety and the cleanliness of BART stations and trains. Surveys have also shown that BART riders want more efficient connections with other transit operators on both ends of their BART ride. They also would like to see a common ticketing system.

At BART, serving our customers is our top priority. We will address their issues and needs, including their desire for integrated, seamless connections with other transit operators. We recognize that our customers have choices, and we want them to continue to choose BART.

THE BART CUSTOMER EXPERIENCE

BUILDING PARTNERSHIPS FOR SUPPORT

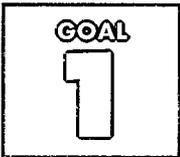
TRANSIT TRAVEL DEMAND

LAND USE AND QUALITY OF LIFE

PEOPLE OF BART

PHYSICAL INFRASTRUCTURE

FINANCIAL HEALTH



We will continually improve customer satisfaction by maintaining performance standards and providing quality customer service.

OBJECTIVES/MEASURES:

Continue measuring and improving customer satisfaction with BART services.

Continue measuring and improving on core service attributes.

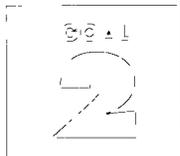
Customer Survey Programs

BART conducts regular surveys that measure rider satisfaction with the BART experience. BART surveyors ask customers to assess the quality of such things as train schedule adherence, parking availability, ticketing, and interactions with BART staff. BART also conducts regular surveys of the passenger environment. This effort involves systematically grading such things as the cleanliness of station platforms and trains, the audibility and informativeness of announcements, and the availability of printed schedules. Other ongoing survey efforts include semi-annual parking utilization surveys that assess to what extent BART lots are filled at various points in the day. BART also conducts occasional large-scale surveys that gather rider origin/destination information and demographic data.

STRATEGIES:

- Develop a better understanding of what aspects of our service are most important to overall customer satisfaction (e.g., ticketing experience).
- Anticipate our customers' evolving needs over time.
- Actively communicate our response to customer input including: complaints, surveys, focus groups, and other forums (*see People of BART: Goal 2 and Building Partnerships: Goal 2*).
- Establish customer service performance standards at both station and system-wide levels and develop differentiated approaches for improving service locally and system-wide, as appropriate.
- Implement policies to address barriers to customer satisfaction.
- Build a customer focus into BART management practices (e.g., budgeting process, departmental customer service plans) (*see People of BART: Goal 2*).
- Empower front-line staff (i.e., provide authority, skills, and tools) to respond to customer needs (*see People of BART: Goal 2*).
- Develop an incentive program to encourage all employees to strive for customer service excellence (*see People of BART: Goal 2*).
- Solicit customer input when we renovate, or modify equipment and systems that interface with customers directly (*see Physical Infrastructure: Goal 3*).

The BART Customer Experience



We will maximize regional transit access, convenience, and ease of use through effective coordination among transit providers.



OBJECTIVES/MEASURES:

Improve customers' rating of "timeliness of bus connections."

Improve intermodal transit time competitiveness relative to the automobile, for trips that serve major destinations.

Increase transit ridership and revenue by increasing convenience (especially for intermodal trips) and develop additional measures of customer satisfaction to track our success.

Work to develop proactive, productive partnerships with at least one or two other transit providers per year to integrate fares, schedules, services, and information.

THE BART CUSTOMER EXPERIENCE

BUILDING PARTNERSHIPS FOR SUPPORT

TRANSIT TRAVEL DEMAND

LAND USE AND QUALITY OF LIFE

PEOPLE OF BART

PHYSICAL INFRASTRUCTURE

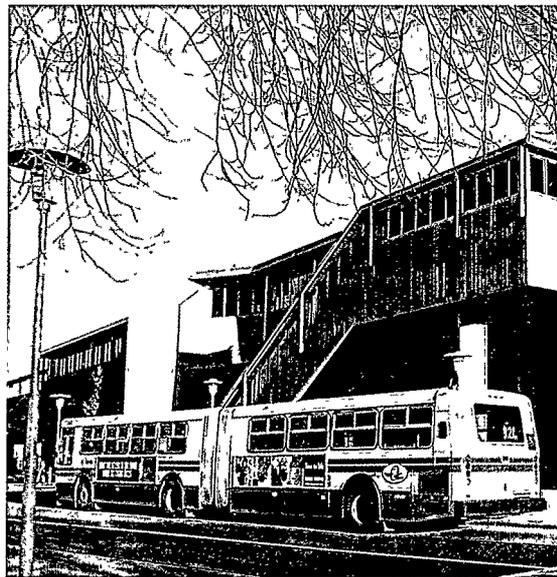
FINANCIAL HEALTH

STRATEGIES:

- Develop and monitor measures on comparative door-to-door timing for the customer.
- Enter into formal agreements with other transit partners, establishing a framework for working together more closely.
- Work with transit partners to improve feeder service for customers (*see Transit Travel Demand: Goal 3*).
- Support the development of incentives to spur further improvements in the quality of transit connections.
- Actively support transit agencies in marketing their connections to BART riders.
- Complete a study to determine the feasibility of providing real time intermodal schedule information to BART customers.
- Design physical infrastructure improvements to minimize rider movement required for transfer between systems, to minimize traffic and other transit complications around BART stations, and to improve customer comfort for transferring and waiting patrons.

Station Cars

Station cars are automobiles that are used by several BART riders per day to give them access and egress to and from stations. BART conducted a two-and-a-half year program using forty electric vehicles imported from Norway. "CarLink" is a new car sharing/station car program using twelve compressed natural gas cars from Honda. Soon BART will have station car services provided by a rental car company, using gasoline cars. One BART customer will drive the car from home to the station. Another BART customer will drive the car from the station to a work site, freeing up the parking space for a third BART customer. A station car system triples the number of customers that BART can serve with one parking space.



Building Partnerships For Support

VISION

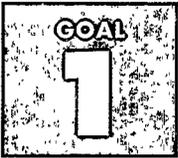
As an indispensable resource to the Bay Area's quality of life, BART will take a leadership role working with diverse stakeholders to promote effective transit policies and political support for regional transit initiatives.



BART is a public agency, and it's our responsibility to serve the best interests of the public in the decisions we make and the policies we adopt. Our independently elected BART Board of Directors has a specific direction and a focused legislative mandate. We are fortunate to have both a clear, unchanging mission and strong public support for carrying it out.

However, it's important that we don't take public support for granted, particularly as competition for limited transit funding intensifies. We must do a better job of reaching out to our customers and other stakeholders to gather feedback, provide information, and enlist their support. As part of this outreach, the BART Board of Directors is stepping up efforts to include BART customers and stakeholders in a variety of forums on BART-related issues.

We also must build better partnerships with other transit operators. Partnerships based on common goals—such as integrated transit services and a sharper focus on customer needs—are essential to our future success.



BART will be viewed by stakeholders as a credible, trustworthy steward of the system we manage and operate, focused on improving our value to the riders and the communities we serve.

OBJECTIVES/MEASURES:

Regular, periodic customer surveys will show an increase in the extent to which our riders value BART service.

Taxpayers will vote to endorse BART initiatives.

The ratio of positive/negative customer feedback regarding BART service will increase annually.

STRATEGIES:

- Provide quality day-to-day service through continually improving our service delivery operations.
- Using targeted information programs, highlight BART activities in public forums.



Building Partnerships For Support



BART will encourage and consider public input as integral to sound, balanced policy development and decision-making, and make deliberate, disciplined decisions in the best interests of the people it serves.

OBJECTIVES/MEASURES:

Have in place a decision-making process that obtains public feedback about pending key decisions.

Establish criteria for defining adequate public input for Board policy development and review (e.g., items involving substantial policy implications will require substantial public outreach).

STRATEGIES:

- Based on Board public input criteria, consult customer advisory groups, conduct periodic focus groups, customer forums, and topic/issue workshops in the communities affected.
- Identify ways to better establish accountability and responsibility for performance at all levels of the organization.
- Actively communicate with riders and residents about key BART decisions and initiatives (*see BART Customer Experience: Goal 1 and Physical Infrastructure: Goal 3*).

Paratransit Consortium

BART provides for door-to-door paratransit service for people whose disabilities prevent them from using the BART rail system. Typical paratransit users are very elderly people with severe mobility impairments that prevent independent travel, even in a wheelchair, individuals who are both blind and hard of hearing, or people with cognitive impairments who are unable to understand how to use the system. This type of paratransit service is required of all transit operators by the Americans with Disabilities Act. To provide paratransit, BART has specific financial and organizational agreements with the following other Bay Area transit operators: AC Transit, MUNI, CCCTA, LAVTA, Tri-Delta, and WestCAT.



Residents of the Bay Area will value and take pride in BART as an integral part of their communities.

OBJECTIVES/MEASURES:

Assess the degree to which the public values and takes pride in BART as an integral part of their communities.

STRATEGIES:

- Use the results of assessments to set forth an action plan for improvements, to set up a survey-based measurement system to track public opinion over time, and to set measurable goals against which to gauge progress.
- Increase outreach to local communities.
- Develop a program that promotes BART pride among Board members, staff, and all people within the communities we serve.
- Create areas and facilities in or immediately adjacent to our stations that serve as community gathering or exhibit places.
- Develop a good neighbor policy statement outlining the specific efforts underway to mitigate impacts on areas close to BART lines, stations, and other facilities.
- Identify, mobilize, listen, analyze, and respond to the concerns of neighbors and other stakeholders.



Key elected officials, opinion leaders, and decision makers will understand and actively support transit needs and initiatives.

OBJECTIVES/MEASURES:

BART will be sought out to participate in regional decision making forums.

Voters will endorse transit initiatives.

Legislators will sponsor and support transit initiatives.

STRATEGIES:

- Actively participate in regional efforts to establish priorities for regional transit investments.
- Develop and maintain effective advocacy partnerships with related constituencies.
- Increase opportunities for communication between BART Board members and other elected officials and policy makers.
- Seek or create opportunities to provide periodic updates to external decision makers on BART programs.

Transit Travel Demand

VISION

The BART system will be used to its fullest potential, maximizing transit ridership in order to enhance the Bay Area's quality of life.



Our mission is to meet our customers' needs for safe, reliable, efficient transit services. As our riders' needs evolve, we must be prepared to change as well.

Today our customer base has a turnover rate of 15% annually. It's important that we understand the causes for this turnover and address them appropriately. We know that access to BART is an extremely important issue for customers. We are addressing access issues by coordinating with other transit operators, and focusing on new ways to get riders to and from BART stations more efficiently during midday hours when BART parking lots are full.

We are also exploring new and untapped sources of ridership that are likely to emerge as a result of the San Francisco International Airport extension, transit-oriented development activities, and new connections with other operators. Growing traffic congestion is likely to stimulate a growing demand for BART services in the future. We must be ready to meet all of these needs, and to provide a level of service that encourages ongoing BART ridership.



We will work to understand changing transit demand patterns and be prepared to respond to them, and we will work proactively to influence travel demand trends in the region that support transit ridership.

OBJECTIVES/MEASURES:

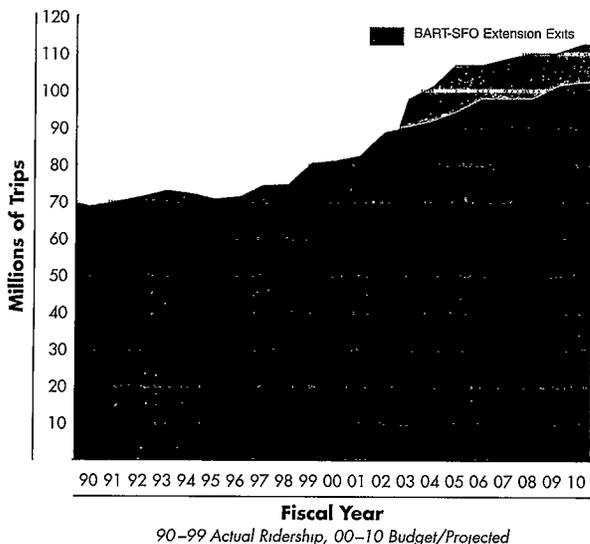
Produce biennial reports on the requirements of new and changing market dynamics to better understand the potential impacts of
 1) major public infrastructure investments and
 2) transportation pricing policies.

Increase transit ridership annually.

STRATEGIES:

- Track regional growth and activity patterns to identify existing and emerging markets that could be served by BART.
- Advocate those infrastructure investments that best support transit ridership.
- Identify potential markets and capitalize on opportunities to serve categories of additional riders including: peak direction commuters, reverse commuters, and off-peak riders.
- Identify strategies to partner with or create incentives for employers and developers to promote increased transit use.
- Track major public infrastructure investments and determine those investments that best support public transit.
- Support transportation pricing policies that encourage shifts to transit, such as gas taxes, bridge tolls, and highway congestion pricing. Advocate those pricing policies that best support transit ridership.

BART Total Annual Passengers



Transit Travel Demand



We will optimize the use of existing capacity.

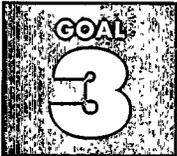
OBJECTIVES/MEASURES:

Increase off-peak, reverse commute, and intra-suburban travel.



STRATEGIES:

- Improve physical and institutional linkages to concentrations of employment or other activities.
- Encourage growth of employment, and cultural/entertainment, educational, and medical facilities near stations.
- Increase potential rider awareness of off-peak, reverse commute, intra-suburban destinations, and links to cultural activities.
- Develop a relationship marketing program to build off-peak, reverse commute, intra-suburban ridership to key destinations.
- Provide state-of-the-art information technology and systems (such as BART's website) to assist new or infrequent riders with trip planning and completion (*see BART Customer Experience: Goal 2*).
- Develop pricing incentive policies to influence off-peak, reverse commute, and intra-suburban ridership.
- Address unique access, safety, or security issues of those markets where we have off-peak capacity (e.g., increase number of midday parking spaces).
- Identify transit-oriented development that generates demand for existing BART capacity.



We will encourage and facilitate improved access to and from our stations by all modes.

OBJECTIVES/MEASURES:

Achieve a 10% shift in access mode splits, reducing the percentage of parked Single Occupancy Vehicle relative to access by all other modes by the year 2002.

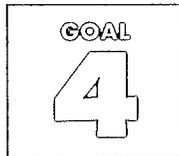
Maintain station throughput capacity to meet growth of demand.



STRATEGIES:

- Monitor BART access mode splits systematically.
- Improve access via taxis, shuttles, buses, walking, bicycles, and other transit.
- Promote innovative access strategies, such as the station car and the bicycle station.
- Work with local communities to promote transit-oriented development, enhanced destinations, and multiple-purpose stops for reverse commute and off-peak riders (e.g., one-stop shopping).
- Develop carpooling strategies involving preferential parking privileges.
- Improve coordination of transit schedules and fares (*see BART Customer Experience: Goal 2*).
- Explore/promote new technologies to improve access to existing stations, such as the Automated Guideway Transit (AGT) systems.
- Anticipate growth of demand that exceeds station throughput capacity and identify strategies to alleviate anticipated bottlenecks in station throughput capacity (*see Physical Infrastructure: Goal 3*).

Transit Travel Demand



BART will work to close gaps in regional rail services between major populations and employment centers and/or corridors.

OBJECTIVES/MEASURES:

In conjunction with development of the Metropolitan Transportation Commission's Regional Transportation Plan (RTP), at least once every four years identify corridors with the most significant transportation needs and establish partnerships to develop consensus on major transit investments, such as BART, or other rail, busways, or Automated Guideway Transit (AGT).

Within the first two years, identify one or two key corridors, such as Fremont-South Bay and another to be determined, and establish partnerships among the respective key agencies and decision-makers to achieve consensus regarding rail service enhancement strategies.

Sources of New Demand

The SFO Extension. By connecting with the San Francisco International Airport and the Caltrain commuter rail system, the BART-SFO Extension will create many new transit options for accessing the business, recreation, and cultural centers in the greater Bay Area. The extension promises to boost the local economy, make access to air travel easier, and add to the regional quality of life.

Connecting to the Oakland Airport. BART is planning a BART-Oakland International Airport Connector using a possible Automated Guideway Technology to carry 3,300,000 passengers annually by 2010. Three-quarters of these Connector passengers would be air travelers and people accompanying the travelers, and one-quarter would be airport employees.

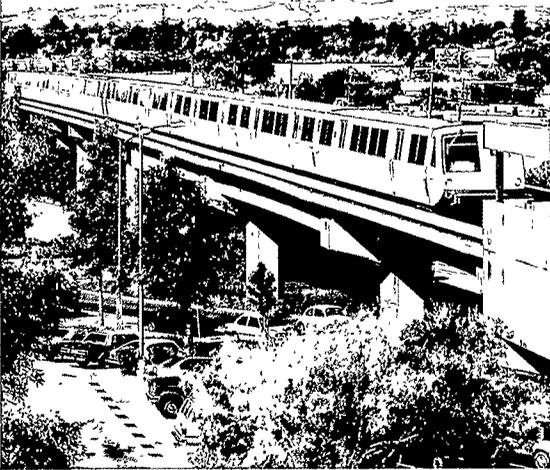
STRATEGIES:

- Work with other public agencies to close the gaps in regional transit service.
- Promote development by appropriate agencies of updated transit travel demand forecasts based on reasonable land use projections and network assumptions.
- Develop policy guidelines delineating the funding and planning actions and criteria necessary for communities to pursue BART or other rail linkages to their areas.
- Identify transit-oriented nodes and corridors of future expansion, and outline a package of incremental future development: transit centers, transit oriented development, busways, AGT and rail extensions.
- Provide improved intermodal linkages between BART and other rail transit operators in the region, such as Caltrain, Altamont Commuter Express, and Capitol Corridor.
- Encourage counties neighboring the BART District (i.e., San Mateo and Santa Clara Counties) to become part of the District, in recognition of the interdependent transportation needs that exist and the need for better coordination and representation. Develop policy guidelines delineating equitable financial and other criteria for membership in the District.

Land Use and Quality of Life

VISION

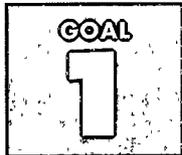
In partnership with the communities we serve, our investment choices and policy decisions will encourage, support, and enhance access to transit through development of transit-oriented communities to realize the full value of our transit investments while maximizing the livability and vitality of those communities.



When BART was first designed, the system was expected to encourage high-density growth in the Bay Area's urban centers, and guide suburban growth along a few radial corridors. Today that vision has changed. A great deal of growth has occurred far beyond BART service areas, and the type of development that communities want in and around BART stations has also changed.

Encouragement of transit-oriented development remains an important goal—both for BART and for the region's overall quality of life—but it's a goal that can be achieved only through new community partnerships. Today communities want transit-oriented development that enables local residents to make lifestyle choices that aren't dependent on auto use. Local jurisdictions also want to create an environment that safely and effectively links BART with other public transit services in the surrounding community.

For BART, this shift requires a new focus on the individual needs of the communities it serves. Successful integration of BART service into a community's social and economic life will boost BART ridership, and is also likely to encourage greater use and support for the system as a whole.



In partnership with the communities it serves, BART's properties will be used in ways that first maximize transit ridership and then balance transit-oriented development goals with community desires.

OBJECTIVES/MEASURES:

We will coordinate comprehensive planning and assessment of transit-oriented development at BART stations in concert with local communities.

Develop and implement a support structure to ensure that all new development at BART stations be transit-oriented.

Fruitvale Transit Village

The Fruitvale Transit Village is a \$70 million model for transit-oriented development in the urban areas, which began construction in Fall 1999. The project is based on an innovative collaboration between BART, the City of Oakland, and the developer, the Spanish Speaking Unity Council, and will transform the way the station interacts with the community. The BART station will be connected to the neighborhood commercial corridor by a dramatic pedestrian plaza bordered by outdoor cafes, shops, fountains, artwork, and informational kiosks. The project includes community services such as health care, a senior center, daycare, and a city library, as well as retail, office space, and housing. A new BART parking structure will provide patron parking. The Transit Village has strong support from many federal agencies including the Federal Transit Administration.

STRATEGIES:

- Prepare Transit-Oriented Development (TOD) Guidelines for BART station areas with local jurisdictions and other interested organizations, to function as a toolbox for BART staff, local communities, and developers.
- Similarly, prepare BART Station Access Guidelines.
- Based on TOD Guidelines, current developer interest in building TOD projects, and current BART Capital Improvement Program (CIP) projects and priorities, determine if BART's CIP elements should be re-prioritized to leverage community and/or private investments in TOD projects.
- Improve communication regarding land use issues at BART stations between BART and communities through which BART runs.
- Develop a process within BART for continued Station Area Strategic Planning.
- Amend BART's enabling legislation to enhance the ability of BART to more effectively implement transit-oriented development projects.

Land Use and Quality of Life



In partnership with the communities BART serves, we will promote transit ridership and enhance the quality of life by encouraging and supporting transit-oriented development within walking distance of BART stations.

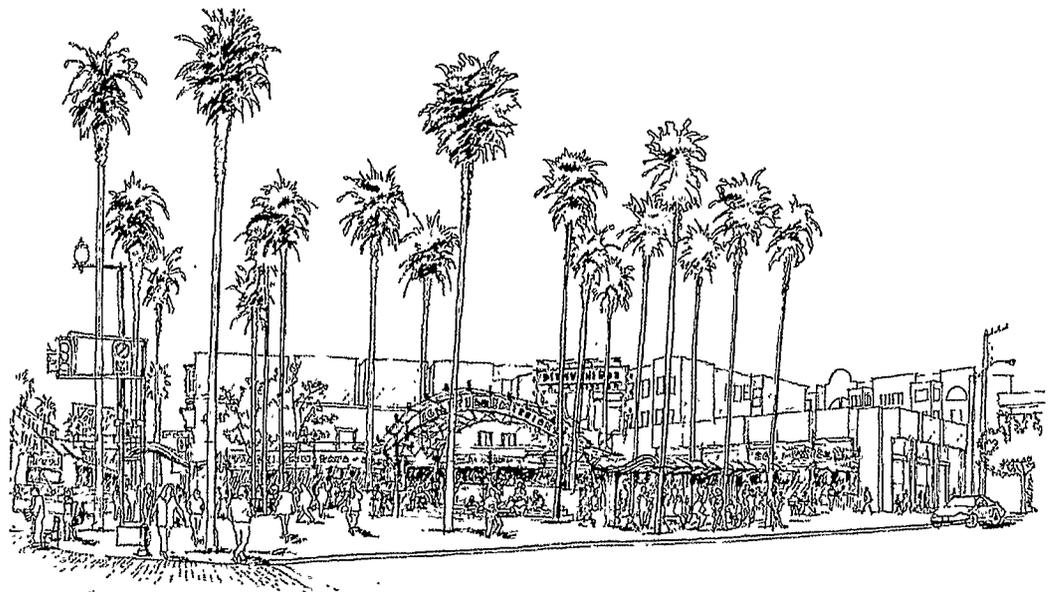
OBJECTIVES/MEASURES:

We will coordinate comprehensive planning and assessment of transit-oriented development around BART stations in concert with local communities.

Develop and implement a support structure to enable BART to advocate and educate for transit-oriented development near BART stations.

Establish an approach for BART station area planning to connect with planning efforts in local communities adjacent to BART.

San Francisco 16th Street Station Planning Concepts



Proposed View of Southwest Plaza

STRATEGIES:

- Create and maintain an information resource for use by BART staff, local officials, developers, and the public regarding transit-oriented development near BART stations.
- Create a public information and education outreach program on the topic of transit-oriented development near BART stations, including up-to-date information on funding opportunities for planning and construction.
- Establish coalitions with other transit providers to promote intermodal improvements at BART stations (*see Partnerships for Support: Goal 1*).
- Improve communication regarding station area land use issues between BART and communities through which BART runs.
- Establish a Bay Area consortium to pro-actively and positively address transit-oriented development in the region.
- Based on TOD Guidelines, current developer interest in TOD projects, current Regional Transportation Plan (RTP) and federal/state funding projects and priorities, determine if the RTP and federal/state elements should be re-prioritized to better leverage community and/or private developer investments in TOD projects. Advocate in the appropriate funding venues.
- Participate in appropriate forums concerning regional transportation infrastructure/land use decisions.

Note: BART's role in regional land use planning was an issue of considerable interest and discussion. The two goals included in this section relate to property BART owns and to the area around BART stations. There was a significant minority viewpoint that there should be a third broader focus defining an advocacy role for BART in region-wide transit-supportive land use policies.



Proposed View of Northeast Plaza

People of BART

VISION

BART will be a professional, caring organization dedicated to meeting the needs of our customers.



BART's workforce takes pride in building, maintaining, and operating the BART system. As many of our most skilled and experienced staff reach retirement age, we must ensure that new generations of BART employees receive the technological training required to support and maintain BART in the future. At the same time, we need to increase our focus on the "human side" of BART.

Our human resource issues and needs are not fully supported by the right tools and measures. In addition, many of our internal systems and procedures lack efficiency and innovation. Our new focus is on creating internal systems and human resource processes that support our technology processes and our external goals.

Within BART, employees express a wide range of feelings about the working environment, ranging from general satisfaction with their jobs and benefits to dissatisfaction with communication and morale. We are adopting new work philosophies and attempting to create a new culture of collaboration, but these changes will take time to implement. We also recognize that BART's labor/management relationship needs improvement. This will be a primary focus as we make efforts to improve the work environment for all BART employees.



BART will create a welcoming and supportive working environment for all employees.

OBJECTIVES / MEASURES:

Develop and establish performance measures, including: job satisfaction, attendance, and knowledge of organizational values.

BART's workforce will reflect the diversity of the communities within our service area.

Have in place a mechanism to facilitate ongoing dialogue within the organization.

Employee Training

BART offers all District employees several workshops for continued career skills development and employee orientation to the District's goals and mission. Some examples of these programs are: Leadership Training, Customer Service, Managing Multiple Priorities, Conflict Management, Effective Communications, Presentation Skills, and Team Development. The continuing workshops offered in-house include: New Employee Orientation, New Supervisor Training, and Career Development Workshops.

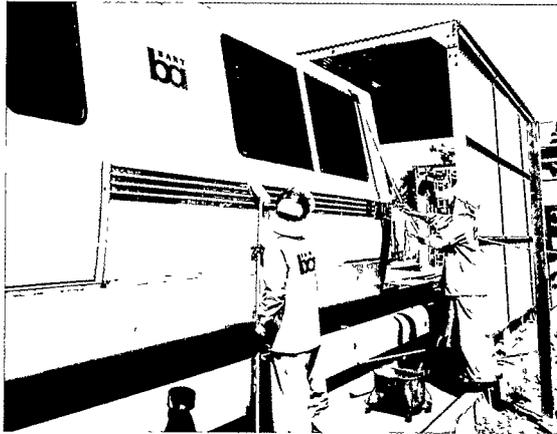
STRATEGIES:

- Conduct employee surveys on an annual basis that will include tracking of job satisfaction.
- Provide employee training and orientation that emphasize the diversity within our workforce.
- Develop an information dissemination system that supports BART employees in doing their jobs.
- Hold regular internal "town hall" meetings to discuss and distribute information and to solicit feedback and input.
- Have a weekly newsletter on e-mail so that everyone in the District will have access to updates and achievements of others to reinforce positive results.
- The District will review its Equal Employment Opportunity Program annually and take corrective action, as needed.

People of BART



BART will have an organizational culture that respects, values, and empowers employees and puts customers first. We will seek to improve working relationships within BART and between BART and the people and communities we serve.



OBJECTIVES/MEASURES:

Mechanisms for effective communication will be in place that give each employee the information and tools they need to support the customers (internal and external) and communities we serve.

Begin development of a change management process that helps all staff to be active participants in organizational change.

Establish benchmarks for employee, community, and customer information/knowledge.

Establish benchmarks for handling employee, customer, and community complaints and suggestions.

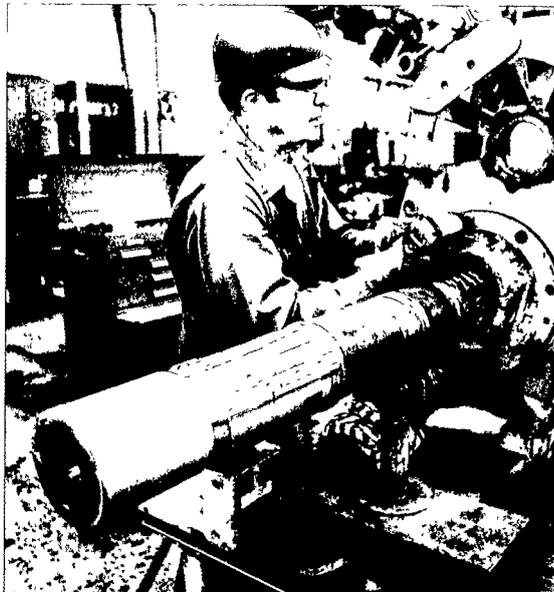
STRATEGIES:

- Develop and communicate organizational values modeled on “BART Leads,” a leadership and management training program initiated at BART, which sets out norms for behavior, creates a sense of purpose, and inspires commitment from staff to work to their highest potential.
- Develop a mechanism to identify, celebrate, and disseminate examples of stewardship (i.e., working for the greater good) throughout the entire organization.
- Build a customer focus into BART management practices (e.g., budgeting process, departmental customer service plans) (*see Customer: Goal 1 Strategies*).
- We will promote an organizational culture guided by trust, openness to ideas, and continuous learning emphasizing strategic thinking, sound judgment, and a customer focus:
 - Training, which can be classroom or self taught.
 - Regular retraining for continuous reinforcement.
 - Develop buy-in of managers which is reinforced through annual performance reviews.
- Implement a recognition system that rewards behaviors that embody the organization’s values and supports the BART culture (e.g., reward employees for going out of their way and/or extra distance to get a job completed).
- Empower front-line staff (i.e., provide authority, skills, and tools) to respond to customer needs (*see BART Customer Experience: Goal 1 Strategies*).
- Recognize the value of the employees at BART.
- Develop strategies to promote the organization’s ability to adapt to change.
- Ensure that all employees have a basic knowledge of the operations of the system including: organizational chart, job categories, internal customer service issues.
- Provide Customer Service training to key employees throughout the system.
- Conduct Customer Satisfaction surveys to help gauge employee performance from the riders’ perspective.
- Establish joint commitment between labor and management to address internal systems that contribute to dissatisfaction.

People
of BART



We will attract, train, retain, and provide job enrichment and career growth to a dedicated and competent workforce.



OBJECTIVES/MEASURES:

Have in place an education and development plan for each employee.

Have in place specific benchmarks for employee satisfaction measures.

STRATEGIES:

- Develop programs to enhance career growth.
- Educate, train, and support employees to promote maximum opportunities for advancement.
- Market BART to potential employees via web site, job fairs, open-houses, etc.
- Emphasize a policy of promotion of the most qualified person.
- Provide up-to-date training modules that are job specific with periodic review of materials for reinforcement.
- Expand the Districts' recruitment program by ensuring effective utilization of available technology (e.g., intranet) providing easy work site access to all employees.
- Review the District's recruitment program annually, using a continuous improvement methodology, to identify strengths and improvements that will result in corrective actions.
- Implement a tested training plan that enhances the skills of all BART employees; this career planning training program will be developed for each job group for those interested in job enrichment and lateral and upward mobility.

BART Leads

The BART Leads program provides leadership training to help build BART for the next century. Initiated in 1999, the program is designed to re-examine long-held beliefs about "the way things are" and enhance the leadership skills that can unlock the good ideas of everyone at BART. The training is built upon the recognition that BART will continue to experience dramatic change in such core areas as commute patterns, capital decision-making authority, workplace expectations, and regional politics. The goal is to build the capacity to manage change by developing a new paradigm of "managers as leaders" focused on empowering the people of BART to deliver the highest levels of customer service.

Physical Infrastructure

VISION

Our infrastructure and equipment will be modernized in a coordinated manner to support the high-quality, efficient, safe and reliable transit system we envision.



The original BART system design was consistently configured and integrated, incorporating many technological innovations. Today BART's original design poses challenges to both service and maintenance.

BART's leadership in new technology means BART is often the first to encounter problems and the associated costs of fixing them. And when BART breaks down, the integrated technology of the system can cause failure to spread rapidly, affecting many stations and thousands of riders. Congestion on merging routes can also cause service delays that spread quickly. It all adds up to a low systemwide tolerance for failure.

Today BART is making a significant investment in its 26-year-old infrastructure. Because this infrastructure was built all at once, it also requires simultaneous renewal and improvements. There is also a need for continuous maintenance and upkeep to support BART's renewal program, and for major investments in seismic upgrades, new business systems, and integrated offices. All of this adds up to a major need for investment in BART's infrastructure in coming years. BART is turning its attention to this task, and will work to preserve and protect the Bay Area's significant investment in mass transit.



We will make annual investments in maintenance and repair of our physical infrastructure sufficient to support safety, cleanliness, reliability, train performance, and customer friendliness.

OBJECTIVES/MEASURES:

Establish yearly performance goals that measure service delivery, reliability, and cleanliness of our physical plant and support systems.

Confirm that performance goals reflect customer service satisfaction measured by the customer service survey (*see BART Customer Experience: Goal 1, Objectives*).

STRATEGIES:

- Report performance monthly through the Operations Department Performance Charts, and quarterly to the Board.
- Continuously monitor the infrastructure, systems, and operations performance for trends that are indicative of maintenance effectiveness towards meeting our goals.
- Meet periodically with appropriate support and planning groups to identify customer needs that may require new or enhanced maintenance efforts.
- Develop annual operating budget that supports our annual performance goals.
- Annually fund critical short term and ongoing budgetary needs to address lack of goal attainment or trends that cannot be corrected by routine operating expenditures.

Physical Infrastructure



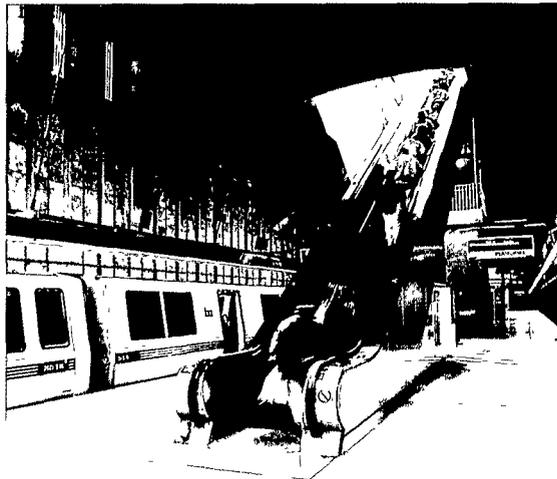
We will meet the demands of our customers and we will assure the long-term viability of BART by continuously re-investing in our aging infrastructure so as to maintain its functional value.

OBJECTIVES/MEASURES:

Develop sound fiscal programs to replace, renovate, and modernize the existing plant, systems, and rolling stock.

Update annually, an infrastructure investment program to address: seismic upgrade of all BART owned structures, revenue vehicle rehabilitation, systems upgrades, station rehabilitation, and support facilities expansion.

Yearly re-evaluate Capital Improvement Program (CIP), based upon District needs and funding allocations.



STRATEGIES:

- Develop systems to document and support changes that increase service capacity or quality (i.e., systematic review of impacts and a financial plan that maintains service levels).
- Identify and develop and utilize new and proven technologies, as needed, to support system reliability, and reduce operating and maintenance costs.
- Identify the effect of changes in ridership on our ability to maintain service reliability.
- Reassess existing demand-management strategies to address service reliability issues.
- Plan and implement renovation, maintenance, and repair programs to optimize life/duty-cycle costs and increase system performance.



Insure that infrastructure and maintenance capacity supports the planned level of service. At the same time, provide the infrastructure flexibility to support the planned level of service.

OBJECTIVES/MEASURES:

Periodically analyze the levels of service quality to be maintained and balance with planned expansions.

Identify and annually evaluate and prioritize flexibility improvements that will uphold service quality while demand increases.

Advanced Automated Train Control System

BART is developing a revolutionary train control system which utilizes radio frequency transmitters and receivers to locate and control the movement of trains. This system is based on a communication and control technology originally developed by the Hughes Aircraft Company for use by the U.S. Army. The current project will install the new system on two of our operating lines and will control trains running between Bay Fair and Daly City stations. The new system will enable BART trains to operate faster and closer together. The shorter end to end trip times achievable with the new system will enable BART to use our fleet of cars more effectively, thereby minimizing the need to add new cars to the fleet as ridership demands increase. The ability to operate our trains closer together will enable BART to increase our passenger carrying capacity thus reducing load factors and providing more seats for our customers. Technical development and testing is scheduled to be completed before the end of the year 2000. Implementation of the new system will be completed by mid-2002.

STRATEGIES:

- Regularly determine system operational flexibility needs, standards and priorities, and incorporate a system flexibility assessment in all financial planning.
- Develop policies to garner public and political support for added flexibility to the system.
- Develop the cost benefit analyses needed to support operational flexibility.
- Determine annual improvement increments to show the benefits of enhanced system flexibility.
- Anticipate growth of demand that exceeds station throughput capacity and identify strategies to alleviate anticipated bottlenecks in station throughput capacity (*see Transit Travel Demand: Goal 3*).

Financial Health

VISION

We will know where we are and where we are going financially. Our operating and capital revenues and expenses will be balanced, predictable, sustainable, and sufficient to meet standards and goals.



Since its inception, BART has benefited from relatively stable funding for its operations. Income sources include a districtwide half-cent sales tax, and one of the best returns on fare box collections in the industry. BART has also enjoyed good relationships with state and federal agencies, which tend to understand regional needs and have supported BART with adequate capital funding.

But the future holds new funding challenges, which BART must now address. Today state and federal sources are distributing transit funding in smaller amounts to local agencies, where BART has not built equally strong relationships. In general, regional transit needs have less support at the local level, and BART must vie with local transit operators for a share of the scarce funds that are available. Regionally, the Metropolitan Transportation Commission predicts that funding needed to merely maintain the Bay Area's transit and highway infrastructure will also far exceed future resources.

All of these factors point to a new era for BART. The District must now turn its attention to building new strategic partnerships at the local level, and focus on the interdependency of all transit operators. Partnership and collaboration with other transit providers and local agencies will be key to BART's future success and financial well-being.



We will remain a transit service that is competitive in terms of value (i.e., quality for price) for the people we serve.

OBJECTIVES/MEASURES:

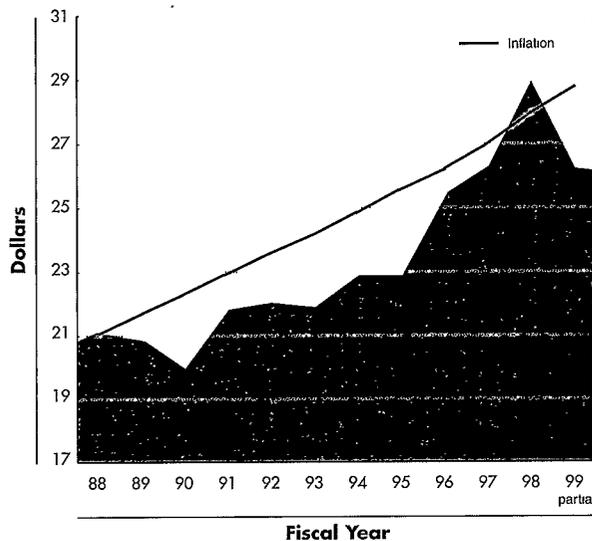
Increase the number of people who perceive BART to be a good value for their money to 60% of customer satisfaction survey respondents.

Hold the annual increase in operating costs per passenger mile at or below the rate of inflation.

STRATEGIES:

- Continue to pursue productivity improvements in all functional areas.
- Make targeted, cost effective service adjustments to improve customer satisfaction.
- Emphasize capital reinvestment programs that reduce operating costs.
- Seek out technology advances that will reduce operating costs and increase customer satisfaction.

Costs vs. Inflation
 Rail Cost per Passenger Mile



Financial Health



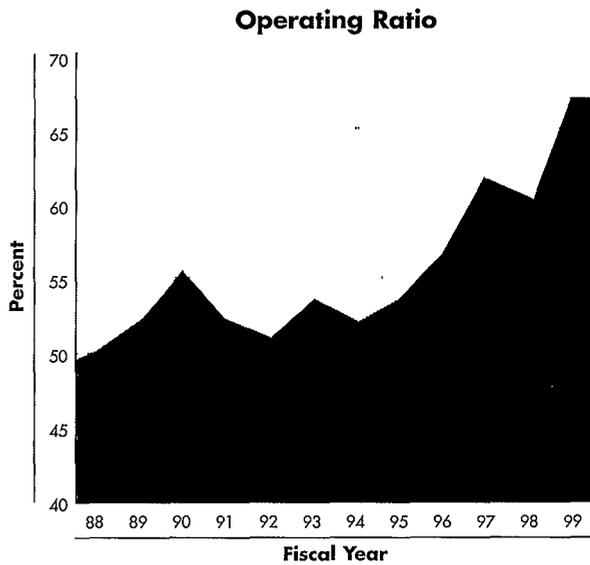
We will maintain and improve the stability of our financial base.

OBJECTIVES/MEASURES:

- Maintain the operating ratio at or above 60%.
- Preserve existing dedicated funding sources.
- Maintain prudent reserves.

STRATEGIES:

- Keep fares current with increases in the cost of living by planning for periodic CPI based fare increases.
- Explore alternatives to increase and diversify non-fare operating revenues (i.e., user charges, public-private partnerships).
- Use sales tax funding wisely for operating expenses and infrastructure reinvestment.
- Explore continuation of BART's existing property tax in order to seismically upgrade the core BART system.
- Increase ridership (*see Transit Travel Demand: Goal 2*).



GOAL
3

We will work with our regional transit partners to advocate for funding needed first to sustain existing transit services and infrastructure reinvestment, and then to pursue prudent expansion.

OBJECTIVES/MEASURES:

Preserve and expand the amount of funding available in the region to sustain existing levels of transit service and infrastructure reinvestment.

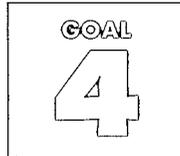
Obtain new funding for prudent expansion of transit service within the region.

STRATEGIES:

- Support the efforts of our transit partners to establish stable funding bases to sustain cost effective transit services and infrastructure reinvestment.
- Work with county sales tax authorities to obtain voter approval to extend sales tax authorizations for transit.
- Work to achieve the goals of the Metropolitan Transportation Commission's Regional Transportation Plan (RTP).
- Work with MTC, local communities, and other transit providers to develop coordinated strategies to maximize state and federal funding available to the region for prudent expansion (*see Building Partnerships: Goal 4*).



Financial Health



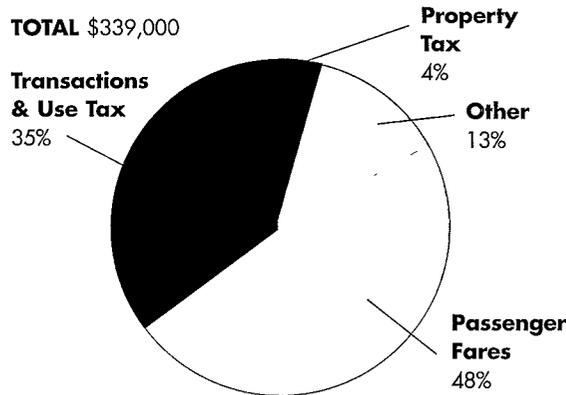
Our financial choices will be guided by prudent fiscal policies and reliable, useful revenue and expense forecasts and plans.

OBJECTIVES/MEASURES:

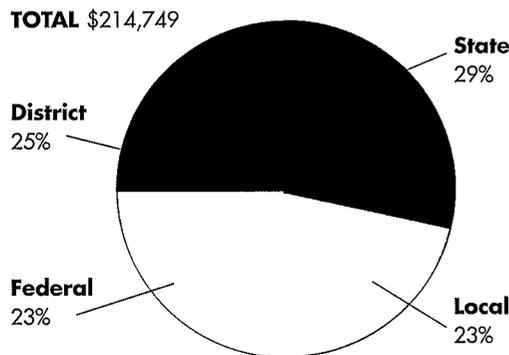
Maintain and improve BART's credit rating to minimize borrowing costs and maintain our reputation for sound fiscal management.

STRATEGIES:

- Develop and adopt a comprehensive set of financial management policies including a detailed analysis of debt capacity and management.
- Continue to prepare performance based operating and capital financial plans (i.e., annual budget, 10 year financial plan).
- Develop and regularly update a strategic, performance based 30 year operating and capital financial plan.
- Establish and regularly update a staged, strategic model for investment decisions.
- Negotiate long term (3-5 year) labor agreements.
- Negotiate long term electric power agreements.



Operating Funds 1997-98
Dollars in Thousands



Capital Funds 1997-98
Dollars in Thousands

BART



San Francisco Bay Area Rapid

Transit District (BART)

Headquarters in Oakland, California

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