



San Francisco Bay Area Rapid Transit District

BART Strategic Plan

STATUS REPORT

April 2003



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Introduction

In 1999 the BART Board of Directors adopted the BART Strategic Plan to guide BART into the 21st Century. In the Fall of 2001, the Board conducted a series of working sessions to review the Strategic Plan, which resulted in a renewed commitment and a more fine-tuned plan with added new focus on implementation. The renewed BART strategy is built on a clear mission and vision of our role in Bay Area transit, which you will find detailed on page 2. 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 in each of these areas. At the heart of the plan is a new emphasis on both internal and external collaboration to reach critical goals more quickly. The plan also includes strategic initiatives – both policies and programs – that have multiple links to these seven focus areas and are aimed at providing definitive strategies for Strategic Plan implementation.

The Strategic Plan Status Report provides a snapshot of the progress made this past year on each focus area and on each of the District's Strategic Initiatives. It concludes with a "Key Indicator" report - an overview of BART system characteristics and performance, past and future.

Mission and Vision

BART's Mission

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

BART's Vision Statement

To be respected as a quality regional public transportation resource and leader, with unique competence as a 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 that are balanced, predictable, stable, sustainable, and sufficient to meet our standards and goals.

Focus Areas

To attain its organizational Mission and Vision, BART is focusing on seven key areas with a vision and specific goals for each area. These areas are closely interrelated and our success in addressing them will have a major impact on the system's future success. The focus areas include:

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.

THE BART CUSTOMER EXPERIENCE

Vision

Goals

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.

1. We will continually improve customer satisfaction by maintaining performance standards and providing quality customer service.
2. We will maximize regional transit access, convenience, and ease of use through effective coordination among transit providers.

Performance Measures

Benchmarks

Status

% of Customer Satisfaction Survey respondents who rate their overall **customer satisfaction** with BART as Very or Somewhat Satisfied.

80% or higher
82% by 2010

80%
(from 2002 survey)

% of **customers who arrive on-time**.

94% or higher
96% by 2010

95.1%
(FY03 through Dec.)

Transit access mode share to BART.

21.5% by 2005
22.0% by 2010

20.5%
(from 1998 survey)

% of Customer Satisfaction Survey respondents who rate **timeliness of connections with buses** (transit) * as "good" or better.

54% or higher
56% by 2010

54%
(from 2002 survey)

* all transit to be measured in future surveys

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 more effective transit policies and political support for regional transit initiatives.

Goals

1. 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.
2. 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.
3. Residents of the Bay Area will value and take pride in BART as an integral part of their communities.
4. Key elected officials, opinion leaders, and decision-makers will understand and actively support transit needs and initiatives.

Performance Measures

% of Customer Satisfaction Survey respondents who rate **BART's leadership in solving regional transportation issues** as "good" or better.

Benchmarks

51% or higher
55% by 2010

Status

51%
(from 2002 survey)

% of Customer Satisfaction Survey respondents who would definitely or probably **recommend BART** to a friend or guest.

90% or higher

90%
(from 2002 survey)

Electoral and legislative **support for transit initiatives**.

Specific goals
vary annually

2002/2003
Passed Prop. 42
Passed S.B. 1415
Safeguarded
Capital Funds
Seismic G.O. Bond
64.2% of needed
66% voter support)

TRANSIT TRAVEL DEMAND

Vision

Goals

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

1. 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.
2. We will optimize the use of existing capacity.
3. We will encourage and facilitate improved access by all modes to and from our stations.
4. BART will work to close gaps in regional rail services between major populations and employment centers and/or corridors.
5. BART will develop the line-haul and station throughput capacity to serve on average at least 500,000 weekday riders (without the addition of a second Transbay tube).

Performance Measures	Benchmarks	Status
Weekday off-peak ridership as a share of total ridership.	44% or higher 46% by 2010	44% (FY03, 2 nd qtr. avg.)
System utilization (passenger miles / revenue seat miles).	35% or higher	31% (FY03, 2 nd qtr. avg.)
Line-haul capacity , station capacity, and station access increases to serve a projected average weekday ridership of:	370,000 by 2008* 420,000 by 2013* 500,000 by 2018*	360,000 (current capacity)

* assumes the same ridership pattern and distribution by time of day as current conditions

TRANSIT TRAVEL DEMAND (continued)

Performance Measures	Benchmarks	Status
BART links to regional rail network and airports.	At least one direct connection between BART and:	
	Muni at:	
	Embarcadero	Exists
	Montgomery	Exists
	Powell	Exists
	Civic Center	Exists
	Glen Park	Exists
	Balboa Park	Exists
	Caltrain at:	
	Millbrae	Opens 2003
	Santa Clara	Part of SVRT
	S.J. Diridon	Part of SVRT
	VTA at:	
S.J. Diridon	Part of SVRT	
Montague	Part of SVRT	
S.J. Market St.	Part of SVRT	
ACE at:		
S.J. Diridon	Part of SVRT	
Santa Clara	Part of SVRT	
Capitol Corridor at:		
S.J. Diridon	Part of SVRT	
Richmond	Exists	
Coliseum	Planned	
Union City	Proposed	
S.F. International Airport		Opens 2003
Oakland Airport		Part of OAC
San Jose Mineta Airport		Proposed

LAND USE AND QUALITY OF LIFE

Vision

Goals

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.

1. 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.
2. 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.
3. We will advocate for transit-supportive land use policies and programs at the local, regional, state, and federal levels.

Performance Measures

Benchmarks

Status

The amount of **TOD on BART property.**

Transit-Oriented Development on BART property (where developable property exists) at 12 of 28 stations by 2010.

Richmond
231 residential units
27,000 sq. ft. retail
cultural facility

Castro Valley
96 residential units
BART police facility

Fruitvale (Phase I)
47 residential units
156,000 sq. ft. retail

Entrance agreements at 5 of 11 stations where no developable property exists by 2010

**19th St.
Powell
Montgomery**

Systemwide land use density*
within ½ mile of BART stations.
(population density + employment
density per acre)

Average pop. density
26 residents per acre by 2010

1990 pop. density
average= 20.7

Average emp. density
33 jobs per acre by 2010

1990 emp. density
average= 26.2

Average combined
59 residents/jobs per acre by 2010

combined density
average= 46.9

*2000 data requested from MTC

PEOPLE OF BART

Vision

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

Goals

1. BART will create a welcoming and supportive working environment for all employees.
2. BART will have an organizational structure 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.
3. We will attract, train, retain, and provide job enrichment and career growth to a dedicated and competent workforce.

Performance Measures

Benchmarks

Status

Annual % of the **workforce who leave BART for reasons other than retirement.**

4% or less

3.6%
(in 2002)

Employee safety using OSHA Recordable Injuries & Illness rate (claims / million hours worked)

20 or less

16.8
(FY03 through Dec.)

Internal promotions based on % of positions filled by BART staff*

55% or higher

51.3%
(past three fiscal years)

Avg. # of **training hours** per employee per year provided by the District.

40 or higher

38.4
(FY02 total)

* excludes entry level positions

PHYSICAL INFRASTRUCTURE

Vision

Goals

Our infrastructure and equipment will be maintained in a condition that enables us to supply high-quality, clean, safe, reliable, and customer-friendly transportation.

1. We will make annual investments in maintenance and repair of our physical infrastructure sufficient to support safety, cleanliness, reliability, train performance, and customer friendliness.
2. We will meet the demands of our customers and assure the long-term viability of BART by continuously re-investing in our aging infrastructure so as to maintain its functional value.
3. Ensure 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.

Performance Measures

Benchmarks

Status

Minimum % of system operating expense allocated to **capital investment**.

3% or higher

FY03 Budget – 3%
FY03 Actual - TBD

Total investment in physical Infrastructure between 2003 and 2013

\$1.5 B for seismic
\$2.2 B for renovation

\$193 M programmed
\$108 M programmed

% of **faregates in service**.

95% or higher
98% by 2010

95.7%
(FY03 through Dec.)

% of **elevators in service**.

97% or higher

95.7%
(FY03 through Dec.)

% of **escalators in service**.

95% or higher

97.8%
(FY03 through Dec.)

% of BART customers who rate **train cleanliness** as “good” or better.

52% or higher
65% by 2010

52%
(from 2002 survey)

% of BART customers who rate **the cleanliness inside stations** as “good” or better.

56% or higher
70% by 2010

56%
(from 2002 survey)

Mean time between service delays.
(vehicle reliability)

1500 hours or higher
2300 hours by 2010

1779 hours
(FY03 through Dec.)

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.

Goals

1. We will remain a transit service that is competitive in terms of value (i.e., quality for price) for the people we serve.
2. We will maintain and improve the stability of our financial base.
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.
4. Our financial choices will be guided by prudent fiscal policies and reliable, useful revenue and expense forecasts and plans.

Performance Measure

% of Customer Satisfaction Survey respondents who rate **BART as a good value for the money.**

Benchmarks

70% or higher

Status

66%
(from 2002 survey)

Annual **increase in operating costs** per passenger mile.

at or below the 10-year average rate of inflation

FY02 10-yr. avg. rate of inflation
+2.8%

FY02 10-yr. avg. increase in Op. Cost
+2.5%

BART's **operating ratio.**

60% or higher

61.5%
(FY03 through Dec.)

BART's **credit rating.**

Fitch: AA
Moody's: Aa3
S & P: AA-

Fitch: AA
Moody's: Aa3
S & P: AA-

BART's **prudent reserve** for economic uncertainty.

5% of total annual operating expenses

Financial Stability Policy, Adopted 3/03

Strategic Initiatives

BART Strategic Initiatives are both policies and programs that outline specific goals and strategies aimed at attaining the District's organization mission and vision. The strategic initiatives include:

Policies

- System Expansion
- Access Management and Improvement
- Welfare to Work to Career
- Station Area Planning
- Sustainability
- Financial Stability

Programs

- Renovation
- Employee Development and Stewardship
- Seismic Retrofit Program
- Business Advancement Plan
- System Capacity

system expansion

POLICY

System Expansion

Over forty years ago, residents of Alameda, Contra Costa, and San Francisco Counties supported the creation of the BART District. Since that time, BART has become a critical component of the region's transportation system. Today, the pressures of growth in the Bay Area continue. Accommodating this growth continues to drive further dispersal of jobs and housing. At the same time, BART and other transit systems demand a continued level of reinvestment to maintain service. Finally, financial support for BART and other transportation systems must compete with their infrastructure and social needs. It is imperative that BART, as a steward of public funding for transportation investments, continue to:

- Ensure cost-effective transportation investment decisions;
- Protect the taxpayers' investment in the District's physical infrastructure;
- Ensure the financial health and sustainability of the District; and
- Enhance the Bay Area's environment and quality of life.

GOALS:

- 1 Enhance regional mobility, especially access to jobs.
- 2 Generate new ridership on a cost-effective basis.
- 3 Demonstrate a commitment to transit-supportive growth and development.
- 4 Enhance multi-modal access to the BART system.
- 5 Develop projects in partnership with communities that will be served.
- 6 Implement and operate technology-appropriate service.
- 7 Assure that all projects address the needs of the District's residents.

STRATEGIES:

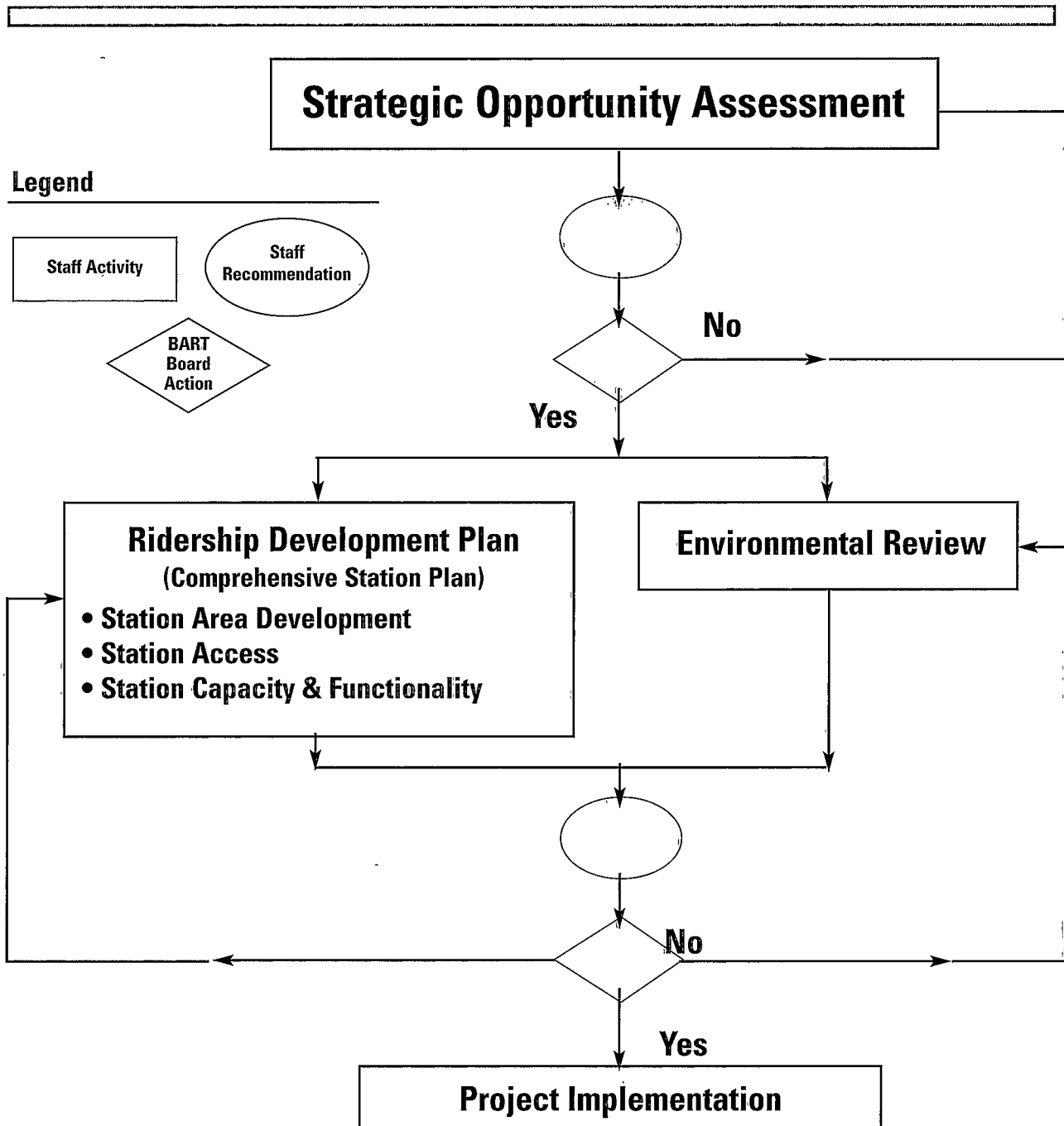
PARTNERSHIP Seek partnerships with other transit agencies, local communities, and private entities to plan and implement service expansion.

TRANSIT SERVICE OPTIONS Explore new BART and other transit service options (e.g., commuter rail, light rail, quality bus), where appropriate, and possibly as an interim service.

CRITERIA AND PROCESS FOR PROJECT ADVANCEMENT Develop a process and set of criteria for evaluating expansion opportunities and create some guidelines for determining whether to advance potential projects to the next phase.

HIGHLIGHTS OF ACCOMPLISHMENTS

- BART Board adopted Project Advancement Criteria & Process, as a refinement to the System Expansion Policy.
- BART conducted System Expansion studies in several corridors and locations.
- BART supported regional transit and land use planning efforts.



PROJECT ADVANCEMENT PROCESS

STAGE 1

Strategic Opportunity Assessment

- Initial planning assessment of transit expansion opportunities.
- Level of effort commensurate with funding availability for study.
- May include several planning efforts before project recommendation brought forward to the Board.

Project Advancement

- Staff uses study reports to evaluate a project against the criteria and decides whether to recommend a project for advancement to the next stage.
- Board considers staff recommendations and decides whether to advance project recommendation to the next stage for further study.

STAGE 2

Ridership Development Plan

- Work in partnership with local jurisdictions to develop a Memorandum of Understanding (MOU) laying out coordinated timelines for transit project Environmental Review and the Ridership Development Plan process.
- Work in partnership with local jurisdictions to achieve transit ridership thresholds by balancing transit-oriented development (TOD) and access goals with community desires; seek commitments from local jurisdictions regarding land use and access plans.

Environmental Review

- CEQA and/or NEPA environmental review process (as applicable)

Project Advancement

- Ridership Development Plan prepared concurrently with Environmental Review and brought forward to the Board.
- Staff uses both documents to evaluate projects with the criteria and decides whether to recommend a project for advancement.
- Board considers staff recommendations and decides whether to advance projects to the next stage.

PROJECT ADVANCEMENT CRITERIA

Transit Supportive Land Use and Access

- Existing Land Use: Residential and/or Employment
- Existing Intermodal Connections
- Land Use Plans and Policies

Ridership Development Plan

- Ridership Threshold
- Station Context

Cost-Effectiveness

- Cost per New Rider: Base Case
- Cost per New Rider: with TOD
- Cost per Transportation System User Benefit

Regional Network Connectivity

- Regional Transportation Gap Closure

System and Financial Capacity

- Core System Improvements
- Capital Finance Plan
- Operating Finance Plan

Partnerships

- Community and Stakeholder Support

system expansion

implementation priorities

description	status
30th Street	Coordinated with BART engineering, operations, and system capacity staff to establish criteria, define and screen alternatives, and assess feasibility, including computer simulation of train operations. Worked with San Francisco city staff on evaluation criteria. Conducted three community meetings. Final draft report for review completed in December 2002.
State Route 4 (eBART)	Reviewed numerous rail, bus, and transportation demand management improvement options. Developed short, medium, and long-term transit strategies. Achieved consensus on alignment and DMU technology. Completed Transit Study in December 2002. Begin EIR/EIS, and Conceptual Engineering and Ridership Development Plans during Q1/2003.
I-80 Corridor	Initiated a study on the feasibility of expanded rail service in West Contra Costa County, including development of plan to implement three peak period commuter rail trips from Solano County to Richmond BART. Identifying and evaluating I-80 Corridor rail alternatives. Developing cost and ridership estimates.
I-580 Corridor/Livermore	Analyzed travel market, cost, and ridership for two alignments and three modes in August 2002. Initiated follow-up study to analyze sub-regional and inter-regional transit options. Will develop land use and access strategies, complete study of DMU and Express Bus network options for I-580/I-680 Corridor, and select preferred alternatives and transit staging plan.
I-680 Corridor	CCTA completed a feasibility study for developing transit between Walnut Creek & Dublin/Pleasanton BART stations.
Alameda Point Gondola	Alameda Point developer has begun the feasibility study of an aerial gondola connecting Alameda Point to West Oakland BART. Estimated study completion in Spring 2003.
Jack London Square	Conducted a Strategic Opportunities Assessment of a Jack London Square BART Station with the City of Oakland and the Port of Oakland. Assessment included identification of key opportunities and constraints, and a stakeholder meeting to assess interest in moving the project forward. Awarded a Caltrans Grant of \$300,000 to conduct a feasibility study, which is anticipated to begin in Spring 2003. Seeking local funds from partner agencies and developers to fully fund the study.

system expansion

implementation priorities

description

status

Warm Springs SEIR

Conducting a Supplemental Environmental Impact Report (SEIR) to update the previous EIR for this adopted project, with report completion in Spring 2003. Will have public hearing for the Draft SEIR. Final SEIR to be certified by the Board.

BART will be providing advice to the City of Fremont on its Warm Springs Area Specific Plan, which considers zoning changes in the area of the proposed BART station.

Silicon Valley Rapid Transit (SVRT) Project

Participating with the Santa Clara Valley Transportation Authority (VTA) in the preparation of an Environmental Impact Statement/Environmental Impact Report to satisfy both federal and state requirements. BART Board and VTA Board to approve the Locally Preferred Alternative and decide on the Approved Project.

Oakland Airport Connector (OAC)

Board adopted FEIR/FEIS and FTA issued the Record of Decision (ROD) in March 2002.

Preliminary Engineering Design-Build Contract Documents initiated in August 2002.

Issue Request for Qualifications to Pre-qualify Potential Prime Contractors in Spring 2003.

Issue Proposal Documents in Fall 2003.

West Dublin/Pleasanton BART Station and Transit Village Project

BART staff continues to negotiate the required pre-construction agreements with the selected Master Developer and Caltrans, in an attempt to find a balance of project elements that will allow the project to advance into the design and construction phase. The coming year should see the conclusion of these negotiations, the selection of a Design/Build Contractor, and the beginning of station design.

system expansion

implementation priorities

description

status

ABAG Smart Growth Strategy

ABAG completed its Final Report, summarizing its public workshop process in October 2002. BART Planning contributed specific analysis of growth scenarios around BART stations.

ABAG Executive Committee to decide on "Policy-Based" Projections, which will be used by MTC for 2004 RTP.

Regional Rail Study

Initiated discussions regarding regional rail integration and expansion issues with partner rail transit agencies.

Formed a Board subcommittee on Regional Rail issues and developed a workscope for a Regional Rail Study with input contributed by executive staff from various Bay Area transit agencies. Staff work has become the basis for a Regional Rail Study that MTC is in the process of launching.

Dumbarton Rail

Participated in Phase I Capitol Corridor and Dumbarton Passenger Rail Study, assessing feasibility of passenger rail station adjacent to BART, track improvements along the Southern Alameda corridors, and order-of-magnitude cost estimating.

Continued participation in Phase II Capitol Corridor and Dumbarton Passenger Rail Study, defining environmental impacts, mitigations, and costs.

Transbay Terminal/Caltrain Extension

Caltrain, the City and County of San Francisco, and the San Francisco Redevelopment Agency released a Draft Environmental Impact Report/Environmental Impact Statement (DEIR/DEIS) for the proposed rebuilding of the Transbay Terminal and the Caltrain extension from South of Market to the Transbay Terminal. BART issued a generally supportive response in October 2002, which highlighted key issues such as connectivity, system capacity, and preservation of future expansion opportunities.

MTC Bay Crossings

The MTC Bay Crossing Study recommended lower-cost operational and capital improvements for the near-term future. Additional revenue vehicles for BART to add line-haul capacity were recommended if the \$1-toll increase is made permanent. A new Transbay Rail Crossing was examined, and recommendations for further study were suggested.

system expansion

implementation priorities

description

status

Ferry Expansion

The Water Transit Authority prepared a program-level Draft Environmental Impact Report for the proposed expansion of ferries across San Francisco Bay. In response, BART expressed general support for the proposal with emphasis on identifying underserved regional markets where ferries could provide additional capacity that complements BART.

High-Speed Rail

High-speed rail project is performing an environmental study. A first phase project has been described as having a Northern California terminus station in San Jose, at the Diridon Railroad Station, where the proposed BART extension to Santa Clara County would also have a station.

access management and improvement

POLICY >>

GOALS:

- 1 Enhance customer satisfaction.
- 2 Increase ridership by enhancing access to the BART system.
- 3 Create access programs in partnership with communities.
- 4 Manage access programs and parking assets in an efficient, productive, environmentally sensitive, and equitable manner.

STRATEGIES:

ACCESS GOALS Set 5- and 10-year access goals in the context of an overall program to expand the capacity of the core BART system during the next decade.

COMMUNITY PARTNERSHIPS Seek partnerships with other transit agencies, local communities, and private entities to plan and implement access programs.

SYSTEMWIDE PARKING MANAGEMENT Update parking management strategies. Offer riders new parking choices pursuant to their willingness to pay.

ACCESS IMPROVEMENTS Undertake access improvements at existing stations. Improvements would fulfill strategic objectives, such as intermodal access and transit-oriented development, and meet BART standards, such as ADA compliance, maintainability, and system consistency. Parking and other modes of access could be increased or reduced to achieve higher ridership in the context of overall station area development and access planning.

NEW PROGRAMS Develop new access programs to address system changes related to the SFO Extension.

RESOURCES Seek grants, rely on BART resources, pursue public/private partnerships, and consider parking charges and fees for services to help offset costs of new services, programs, and improvements in a cost effective manner.

HIGHLIGHTS OF ACCOMPLISHMENTS

- Refined 5- and 10-year access goals were presented to the Board of Directors.
- San Leandro LINKS Shuttle continues to provide access opportunities at the San Leandro BART Station.
- Additional new bike lockers and racks have been installed at most BART stations.
- Monthly Reserved Paid Parking was implemented systemwide in December 2002.
- Board approved daily and monthly parking fees for the West Bay Extension stations.
- Board approved 24-hour parking time limits systemwide and paid long-term airport parking to begin initially at three East Bay stations and to coincide with the opening of SFO Station.

access management & improvement

implementation priorities

description

status

PLAN FOR THE FUTURE

Set 5- and 10-year goals for access by automobile, carpool, transit, bicycle, and foot in concert with other system capacity improvement goals.

Refined 5- and 10-year access goals, in conjunction with the Strategic Plan update, in September 2002.

RESPOND TO NEAR-TERM SYSTEM CHANGES

Develop and implement SFO-related long-term parking program throughout the District.

Long-term parking will initially be available at Bay Fair, El Cerrito del Norte, and Walnut Creek stations when the SFO extension opens in Spring 2003.

Work with SamTrans in San Mateo County to develop and implement SFO Extension Station parking programs.

Board approved \$2-daily and \$63-monthly reserved parking rates in December 2002. Program to be implemented when the SFO extension opens.

MANAGE WHAT WE HAVE BETTER

Review current carpool program and recommend and implement changes to increase and promote use.

Carpool and mid-day spaces to be managed and marketed as a single program starting in August 2003.

Evaluate reserved-parking programs at selected stations on a pilot basis.

Implemented pilot reserved parking program at West Oakland. Based on successful test, reserved parking was implemented systemwide in December 2002.

access management & improvement

implementation priorities

description

status

EXPAND AND IMPROVE SYSTEM ACCESS

Prioritize stations with critical access issues and work in partnership to develop and implement comprehensive access improvement plans for those stations.

Developed access plans for 15 stations, including 16th Street, 24th Street, Oakland Coliseum/Airport, Daly City, Dublin/Pleasanton, El Cerrito Plaza, Embarcadero, Fruitvale, Pittsburg/Bay Point, Richmond, San Leandro, West Oakland, Balboa Park, Pleasant Hill, and Union City during FY02/03. Access plans for 2-6 additional stations, including Bay Fair, Glen Park, Ashby, El Cerrito del Norte, MacArthur, and Walnut Creek, will be completed by end of FY04. Completion of some of these plans is dependent on developers' schedules.

Develop community-appropriate design standards for new access facilities.

Access guidelines will be completed and incorporated into BART Design Standards in April 2003.

Continue efforts to improve bicycle access, and increase access and storage.

Completed bicycle access plans for 14 stations during FY02. Completed installation of 2,000 bike lockers and racks.

Work with MTC and transit operator partners to coordinate, rationalize, and improve transit (e.g. bus, shuttles, taxis) access to regional bus and rail systems.

Continue to coordinate with transit operators to improve access to BART. Current projects include: Pleasant Hill, Union City, West Oakland, El Cerrito del Norte, Richmond, Fruitvale, and all West Bay Extension stations.

welfare to work to career

POLICY 

GOALS:

- 1 Create programs in partnership with others to effectively serve welfare to work clients.
- 2 Enhance mobility for welfare to work clients, especially access to childcare, training, and jobs.
- 3 Strive to be an employer that provides opportunities to welfare to work clients.

STRATEGIES:

PARTNERSHIPS Seek partnerships with social service agencies, employers, transit providers, and MTC to plan and implement programs and improvements that will be of particular benefit to welfare to work clients.

ACCESS Undertake access improvements consistent with the Board-approved Access Management and Improvement Policy Framework, focusing on improvements that will be of particular benefit to welfare to work clients.

TRANSIT-ORIENTED DEVELOPMENT Promote transit-oriented development (TOD) at, and within, walking distance of BART stations. TODs incorporating a variety of land uses, such as childcare, housing, neighborhood-serving retail, services, educational training opportunities, and jobs can help simplify trip-making for welfare to work clients.

EMPLOYMENT Define a program to offer opportunities to welfare to work individuals for hiring and training at BART. The program may be carried out internally or externally to BART.

HIGHLIGHTS OF ACCOMPLISHMENTS

- BART supports local welfare to work transit service.
- BART hosts workshop for social service agency staff.
- BART launches Transportation Academy pilot program.

welfare to work to career

implementation priorities

description

status

Improve access via taxis, shuttles, buses, carpool, walking, bicycle, and other transit to all stations.

Recommendations on access improvements were incorporated into 11 Station Access and three Comprehensive Station plans completed last fiscal year. In addition, a Daly City access plan was completed December 2002.

BART recently received a Caltrans grant for \$180,000 to conduct outreach in targeted environmental justice communities to better understand how residents currently use BART and how BART could better facilitate that use. Outreach around three station areas – Richmond, Embarcadero, and Lake Merritt – will be conducted this fiscal year, and access recommendations will be incorporated into ongoing planning efforts at those stations. Project to be completed by June 2004.

Evaluate system signage and identify improvements to make the system more usable to first time riders, infrequent users, and persons with limited reading or English skills.

Evaluation completed in February 2003. Recommendations will be presented to Executive Staff and incorporated into BART's facilities standards.

Improve provision of information on connecting transit.

BART has supported the development of an internet-based regional trip-planning program called "TakeTransit". This service provides detailed trip itineraries on BART and bus. BART has also supported the initiation of the "511" transit information number.

Provide information to employers who are easily accessed by BART on BART schedules and services, transit benefits programs, connecting transit routes and multi-modal access.

BART staff continues to work with social service agencies and other transit providers by providing materials and participating in orientation sessions for those who work directly with CalWORKS participants and their families.

welfare to work to career

implementation priorities

description

Work with developers, including nonprofit agencies, to encourage, where appropriate, the inclusion of childcare facilities in transit-oriented developments at, or near, BART stations.

Investigate a Transportation Academy pilot program to pre-qualify CalWORKs and other low-income individuals for technical jobs prior to BART job training.

Support legislation and efforts to provide more funding for welfare to work transportation programs and projects.

Seek grant funding for efforts on projects related to welfare to work by BART and BART's partners.

status

BART staff is working with childcare advocates and providers, social service agency staff, local jurisdictions, and others to conduct planning for childcare facilities at several BART stations, including MacArthur, West Oakland, Coliseum, Union City, and Berkeley.

BART staff is actively pursuing the Transportation Academy in collaboration with the community college system. Staff is working to identify and develop curriculum designed to meet the minimum qualifications of transportation job classifications.

BART staff continues to work with partner agencies on advocating funding for the federal Job Access and Reverse Commute grant program and other potential revenue sources.

BART provided financial support for several critical welfare to work transportation projects, including service improvements on two key transit routes that provide connections with BART, one of which is the San Leandro LINKS shuttle.

station area planning

POLICY >>

GOALS:

- 1 Foster compact transit-oriented and transit-serving mixed-use development of BART properties, maximize transit ridership, and balance development goals with community desires.
- 2 Promote transit ridership and enhance quality of life by encouraging and supporting transit-oriented development within walking distance of BART stations and along transit corridors that serve BART stations.
- 3 Advance transit-supportive land use policies at the local, regional, state, and federal levels.

STRATEGIES:

COMPREHENSIVE PLANNING In concert with local communities and planning partners, coordinate comprehensive planning for all BART station areas.

OUTREACH, EDUCATION, AND TECHNICAL ASSISTANCE Create a public information, education, and technical assistance program to promote transit-oriented development at, and around, transit stations.

PARTNERSHIPS AND COALITIONS Participate in partnerships and coalitions at the local, regional, state, and federal levels to plan for and implement transit-oriented development within BART station areas.

IMPLEMENTATION Provide assistance in community planning and design (e.g., charrettes or other processes, wherein planners and developers maximize community involvement to achieve desirable and livable additions to communities around BART station areas), formulation of real estate development strategy, and the removal of barriers to station area development.

ADVOCACY Promote leadership and advocate for transit-supportive land use policies and financial investments in the Bay Area at local, regional, state, and federal levels of government.

HIGHLIGHTS OF ACCOMPLISHMENTS

- Comprehensive Station Plans were completed for Balboa Park, Pleasant Hill, and Union City.
- Additional Station Access Plans were completed for 12 stations: 16th Street, 24th Street, Coliseum, Daly City, Dublin/Pleasanton, El Cerrito Plaza, Embarcadero, Fruitvale, Pittsburg/Bay Point, Richmond, San Leandro, and West Oakland.
- Development of Transit-Oriented Development (TOD) Guidelines are in process.

station area planning

implementation priorities

description

status

COMPREHENSIVE PLANNING

Develop comprehensive station plans for stations.

Completed comprehensive plans for Balboa Park, Pleasant Hill, and Union City. Published and distributed plans to directors, stakeholders, and partners in September 2002.

Develop station access plans for stations.

Completed access plans for 15 stations, including 16th Street, 24th Street, Oakland Coliseum/Airport, Daly City, Dublin/Pleasanton, El Cerrito Plaza, Embarcadero, Fruitvale, Pittsburg/Bay Point, Richmond, San Leandro, West Oakland, Balboa Park, Pleasant Hill, and Union City. Published and distributed plans to directors, stakeholders, and partners in FY03.

Produce "mini-comprehensive station plans" for study of the VTA Core System Impacts.

Produced "mini-comprehensive plans" for Bay Fair, Embarcadero, and Walnut Creek in January 2003. Balboa Park Station Plan also used for reference and analysis.

Create a Station Area Land Use and TOD database in partnership with MTC and Caltrans.

Created Station Area Land Use and TOD database, which includes TODs throughout California. Many of these TODs are located at BART stations.

Present annual status report to Board on station access, planning, and development activities.

Report presented to Board in November 2002.

OUTREACH, EDUCATION, AND TECHNICAL ASSISTANCE

Update BART Planning Web page.

Planning department Web page is available online.

Coordinate TOD Guidelines, System Expansion Criteria, and other policies related to Station Area Planning.

TOD Guidelines are being developed for inclusion in the BART Design Standards by June 2003.

Ongoing Community Planning programs at BART Stations.

Community planning efforts are underway at Richmond, El Cerrito Plaza, Bay Fair, Berkeley, Union City, Warm Springs, Civic Center, Glen Park, Daly City, South San Francisco, Colma, Millbrae, Lafayette, Walnut Creek, and 24th Street.

station area planning

implementation priorities

description

status

PARTNERSHIPS AND COALITIONS

Actively seek funding for Station Area Planning at specific stations when opportunities arise.

Successfully applied for three Caltrans grant categories:

- Community-based Planning (Glen Park and Jack London Square: cities in lead with BART as partner).
- Statewide Planning (updated statewide TOD survey and study).
- Environmental Justice (BART to lead station access outreach at "EJ" communities near Embarcadero, Lake Merritt, and Richmond, and partner with City of Oakland near West Oakland and MacArthur stations).

California Pollution Control Financing Authority (CPCFA) Sustainable Communities Grants:

- Coliseum Station Transit Village Studies.
- Union City Intermodal Station District Studies

Continue to maintain station area working group.

New subcommittee being formed to set agendas.

Support local jurisdictions' general plans, redevelopment plans, countywide transportation plans and programming, and individual station area planning efforts.

Target areas include counties of San Francisco, Alameda, and Contra Costa; cities of Oakland, San Leandro, Union City, Fremont, Berkeley, South San Francisco, Daly City; corridors of Highway 4, I-580, I-80; and along proposed VTA-BART extensions.

Continue participation in local, regional, state, and national TOD forums and committees:

- Rail~volution,
- CA Transit Association & Legislative Smart Growth Caucus,
- State Office of Housing & Community Development,
- Caltrans Statewide TOD Advisory Committee,
- CMA TOD sub-groups,
- Transportation and Land Use Coalition (TALC)
- ABAG Smart Growth Footprint Advisory Committees.

Active participation in all groups cited. For example, BART staff provided specific analysis of growth scenarios around BART stations for ABAG's Smart Growth Footprint projects.

station area planning

implementation priorities

description

status

IMPLEMENTATION

MTC's Transportation for Livable Communities Program

- 16th Street NE and SW Plazas (capital project) Construction of SW plaza expected completion in Spring 2003. NE plaza construction planned for FY04/05
- 24th Street Plaza (planning project) Plan completed in 2001. Partnerships being developed for capital phase.
- Concord (capital project) TLC project complete. Opening ceremony held in January 2002.
- San Leandro Supported San Leandro in receiving TLC grant for streetscape improvements to improve connectivity between downtown and BART station.
Supporting E. 14th Street Corridor Enhancement & Infill project to increase housing densities in the transit corridor.
- Bay Fair Implementation of access improvements resulting from 1999 County, City & BART Community Access Plan; funding from ACCMA & County Redevelopment Agency grants.
- Acorn-Prescott/West Oakland (capital project) Engineering drawings nearing completion. Construction to begin March 2003.
- Develop TLC Criteria for participation in future projects. Ongoing meetings with MTC to discuss improving delivery of TLC projects.

ADVOCACY

Develop legislation to advance station area planning through regional and statewide legislative groups:

- California Transit Association Smart Growth Task Force/ California Futures Network
- Caltrans Statewide TOD Advisory Committee

Continuous involvement of BART staff with legislative advocacy groups promoting legislation supporting smart growth and transit-oriented development.

sustainability

POLICY >>

VISION:

Reinforce BART's essential role in regional sustainability by:

- Improving mobility for Bay Area families and businesses via public transit;
- Increasing public safety and comfort while decreasing air pollution and road congestion;
- Encouraging the region's smart growth via efficient multimodal transportation networking;
- Preserving the natural beauty and character of the region.

Promote the Bay Area's social and environmental quality of life by:

- Increasing the quality, value, and accessibility of BART's service to the riding public of all sectors of the Bay Area communities;
- Providing reliable and comfortable transit options and livable transit corridors to increase the development of affordable housing, and cultural, and business facilities

Maintain the Bay Area's long-term economic prosperity and entrepreneurial spirit by:

- Enhancing the life-cycle value of BART's physical infrastructure and operations for conserving natural resources and protecting public investment;
- Creating more business opportunities for all Bay Area entrepreneurs

Become a model for other transit agencies in optimizing resource efficiency, environmental preservation, transit service quality, and cost effectiveness

GOALS:

- 1 Promote sustainable, transit-oriented development in the communities BART serves to maximize the use of BART as the primary mode of transportation.
- 2 Enhance the use of resource-efficient and environmentally-friendly access modes (e.g., bikes, walking, etc.), and other sustainable features at BART's new and existing stations.
- 3 Integrate sustainability principles and practices including multimodal access into the planning, design, and construction of new BART stations and related facilities.
- 4 Effectively incorporate proven sustainable materials, methods, and technologies into BART's Facilities Standard to increase life-cycle value, including reduction of energy and resource use, and to enhance the health and comfort of BART employees and customers.
- 5 Apply sustainable techniques and procedures into BART's maintenance projects and operations in a cost-effective manner.
- 6 Develop procurement strategies that incorporate sustainability criteria compatible with federal and state non-discrimination requirements.

STRATEGIES:

PARTNERSHIPS Partner with Federal agencies and other organizations to formulate and maintain BART's sustainability practice standards and measurements.

INDUSTRY STANDARDS Strategically adopt applicable provisions of industry standards and technical manuals of sustainable practices, such as applying the Leadership in Energy and Environmental Design Guidelines for creating healthier work places for employees, by providing a better indoor environments.

LOCAL REQUIREMENTS Incorporate local sustainability requirements based on appropriateness.

LEADERSHIP PROGRAM Identify, execute, and monitor leadership projects and facilities for BART's sustainable programs.

SUSTAINABILITY PRACTICE STANDARDS Develop, maintain, and implement BART's sustainability standards.

BENCHMARKS Establish benchmarks to measure the progress and performance of BART's sustainability practice.

sustainability

implementation priorities

description

status

Greening BART – effort in district-wide sustainability education to promote awareness and understanding of general sustainability practice and unique criteria to public transit.

Since November 2001, staff has conducted a district management meeting, workshops, departmental meetings, field visits, and case studies through partnering efforts with U.S. Green Building Council, City & County of San Francisco, City of San Jose, State of California, and Federal GSA.

Establish 5-year performance goals to measure the progress of BART's sustainable practice.

Collect base data pertaining to energy and resource performance of existing facilities and projects by November 2003. Research other agencies' Green Project performance data. Work with BART stakeholders to identify specific goals and indicators.

Report progress to the Board.

Coordinate with other policy updates of the Strategic Plan to present to the Board on the policy's annual progress.

Continue Pilot Leadership Project effort and monitor the results.

- Energy Efficiency project
- Construction waste management recommendations
- Incorporate sustainability practice into BART Facilities Standard

Research and experiment with parking garage lighting electricity reduction. This is partially sponsored by an EPA grant.

Review existing construction and contract documents by August 2003 to seek improvement of construction waste management practice, a partnering project with Alameda County Waste Management Authority.

BART Facilities Standard is currently under development. Applicable and available standards and guidelines pertaining to sustainable development and features will be incorporated. This effort is partially sponsored by an EPA grant.

Formulate BART's Sustainability Practice Standard in phases.

Develop and document BART's current sustainability criteria and draft BART's Sustainability Practice Standard – Phase One by July 2004.

financial stability

Adopted March 27, 2003
Implementation Plan To Be Developed

POLICY

The San Francisco Bay Area Rapid Transit District has an important responsibility to its riders and the citizens of the Bay Area to wisely manage the District's finances in both the short and long term. In times of economic change and uncertainty, it is especially important for the District to make sure its ability to deliver service rests on a strong and stable financial foundation. To this end, the following are the District's financial stability goals and strategies.

GOALS:

- 1 Maintain an operating and capital financial base that is sufficient to deliver safe, quality service efficiently and cost-effectively to meet the level of demand.
- 2 Continuously improve productivity.
- 3 Preserve and maximize BART's fare revenue base, through a predictable pattern of adjustments, while retaining ridership.
- 4 Provide a fare and fee structure that is tied to the cost of providing service, optimizes use of the BART system, and provides BART customers with convenience, ease of use, and a good value for the money.
- 5 Establish and maintain prudent reserves sufficient to ensure that the District can adjust to economic downturns.
- 6 Maintain the highest possible credit rating and reputation for prudent financial management.

STRATEGIES:

OPERATING EXPENSES

Adjust operating expenses as needed to reflect changes in service demand, technology, and productivity.

- Endeavor to keep growth in rail operating expenses (as measured by a rolling average of growth in rail operating cost per passenger mile) at or below the rate of inflation by:

- Implementing technology and productivity advancements designed to reduce or avoid increasing operational costs.
- Exploring appropriate partnerships with public agencies, private entities and BART's represented work force to achieve greater efficiency, effectiveness, and increased ridership.
- Working to increase and optimize ridership on the BART system through partnerships that foster transit oriented development and improve access to the BART system.

- Regularly review productivity improvement programs and results as part of the annual budget process.

CAPITAL INVESTMENT

- Pursue grant funding for BART capital projects pursuant to priorities as addressed in the Capital Improvement Program.
- Adopt an annual budget that includes an allocation to capital programs adequate to meet annual baseline reinvestment needs for programs which are essential to ensure system performance but not likely to receive grant funds. Such funding should also be available for local match to grants and for unforeseen needs and emergencies.
- Use debt financing prudently to leverage local, regional, state, and federal funding for major cyclical capital investments such as transit vehicle, escalator and elevator, fare collection equipment, and train control renovation and replacement.

FARES AND OTHER REVENUES

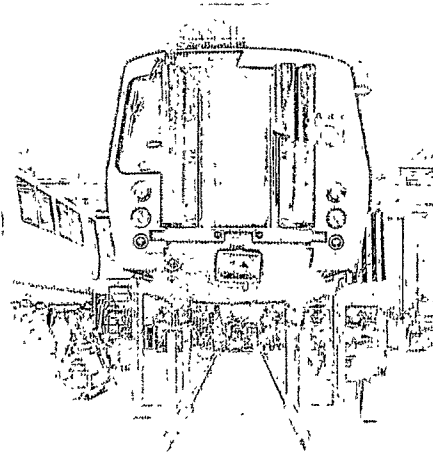
- To the extent revenue increases are needed as one part of a program to preserve BART's revenue base and financial stability, tie passenger revenue increases to service costs and system needs with particular consideration to:
 - Fares aligned with CPI-based cost growth.
 - Small regular fare increases tied to CPI-based cost increases or other major cost factors and to factors such as significant change in other revenues and productivity.
 - Small surcharges tied to capital needs such as rehabilitation or seismic retrofit.
 - A peak premium, at some point in the future when ridership is growing, tied to the need to optimize off-peak system use and to fund core system capacity improvements.
- Increase customer satisfaction, when economically and technologically feasible, by giving consideration to:
 - Increasing discounts for high-value tickets to mitigate the impact of fare increases on regular BART riders.
 - Developing new interoperator and interagency partnerships to increase transit access.
 - Developing innovative partnership programs with major employers, educational institutions, and other rider generators.
 - Using time-limited passes to market BART for special events, weekends, and families, evaluating the impact on ridership of each pass program.
- Increase revenue from other sources such as parking, advertising, concessions, and joint development while meeting customer needs and providing safe, reliable service.

RESERVE FOR ECONOMIC UNCERTAINTY

- Maintain a prudent reserve to be used in times of significant revenue decline to preserve the District's ongoing ability to deliver safe and reliable service to the customer and to reinvest in capital.
- Adopt a Short-Range Transit Plan that builds the reserve to at least 5% of total annual operating expenses by funding regular contributions to the reserve.

renovation

PROGRAM >>



GOALS:

- 1 Protect BART's core system investment by ensuring that capital expenditures support reinvestment cycles and needs.
- 2 Complete the District's 10-year renovation program, initiated in 1995, with focus on A & B car renovation, AFC renovation, elevators and escalators, and first phase of train-control replacement.
- 3 Initiate a second 10-year renovation program focused on a second phase of train-control replacement and C1 car replacement.

PROGRAM ELEMENTS:

- A & B Car Renovation
- AFC/TransLink
- Escalator/Elevator Overhaul
- Advanced Automatic Train Control (AATC)
- Shops Program
- 30-Year Reinvestment Study
- Second 10-Year Renovation Program

HIGHLIGHTS OF ACCOMPLISHMENTS

- All 439 newly renovated A & B cars delivered, as of September 2002.
- All new fare gates installed at six stations. Bill-to-bill changers installed at all stations. Data Acquisition System (DAS) modifications complete.
- Renovation of 60 elevators completed, as of January 2003.
- Renovation of 112 of the 120 escalators completed, as of November 2002.
- Fruitvale Intermodal, Phase II improvements completed.
- Coliseum ADA modifications completed.
- Two new vehicle lifts were installed at each of the Hayward, Daly City, and Richmond shop facilities. Six new lift-equipped workspaces are in operation in the existing and expanded buildings at the Concord site.

renovation

description

A & B Car Renovation Comprehensive rehabilitation of the District's 439 original rail vehicles (replaced electrical and mechanical components and refurbished car interiors) is complete. The renovation is intended to add twenty years of service life to the cars, improve their reliability, and incorporate ADA improvements.

AFC/TransLink This program provides complete replacement of all fare collection equipment throughout the system, including ticket vendors, addfare machines, and faregates. The program also furnishes new bill-to-bill change machines for installation in each BART station, centralized Data Acquisition System (DAS) upgrades, and various AFC infrastructure upgrades in each BART station. The new fare collection equipment will be compatible with MTC's TransLink program. Additional equipment procured for capacity improvement is described more fully in the System Capacity section.

Escalator/Elevator Overhaul After 25 years of use, the BART station elevators and escalators were unreliable and uneconomical to maintain and repair on a routine basis. Full renovation or replacement of escalators throughout the core system is nearing completion.

Advanced Automatic Train Control (AATC) An advanced train control technology is being implemented between the Bay Fair and Daly City stations. This project will allow BART to increase the number of trains traveling through this section of the system from 23 trains per hour to 30 trains per hour. The system will be installed as an overlay to the existing train control equipment, thereby avoiding service disruptions during installation. AATC will permit more accurate monitoring of train location, result in reduced run times, and increase the energy efficiency of the system.

Shops Program Expansions and improvements are nearly complete for the Concord, Daly City, Hayward, and Richmond facilities. Two vehicle lifts were installed at each of the Daly City, Hayward, and Richmond shops. Four new lift-equipped workspaces are in operation in an expanded building at the Concord site and two additional lifts were also installed in the existing Concord facility. Installation of a new train washer, to maintain the fleet at the West Bay maintenance facility, is nearly complete at the Daly City yard. Hayward track improvements are complete, and Daly City is nearing completion. A 10,000-square-foot building expansion of the Hayward component repair shops will extend the front of the building on two floors.

30-Year Reinvestment Study & Financial Plan The Reinvestment Study represents a plan for life-cycle based renovation and replacement of BART's existing capital plant. The overarching 30-Year Financial Plan measures the resources necessary to maintain and operate BART safely and reliably, far into the future.

status

Completed
September 2002.

Work in progress.
Estimated completion of new
equipment installation by
January 2004.

Work in progress.
Estimated completion of escalator
overhaul by June 2004.

Phase II Safety Certification
complete- Summer 2002

Improvements complete:
Concord - Spring 2002
Hayward - Fall 2002
Richmond - Fall 2002
Daly City - Winter 2002.

Completion of updates to the
Reinvestment Study and Financial Plan
by June 2003. One full iteration of the
Financial Plan was presented to the
Board in January 2002. Updates to
both efforts are underway.

renovation

description

Second 10-Year Renovation Program The first 10-year system renovation program, which focused primarily on infrastructure that is directly experienced by customers (e.g., original A & B cars, escalators, elevators, AFC equipment), is nearing completion. Many other elements are still in need of renovation or replacement, including the C1 cars and the train-control system. Work has begun on development of this second-round program of system renovation. The first two objectives are to refine the project funding needs and to develop a funding program to address those needs, both of which are underway.

status

Definition of needs and draft funding program to be completed Summer 2003.

employee development & stewardship

PROGRAM

GOALS:

- 1 Develop core leadership competencies to build and sustain high performance.
- 2 Develop an organization and culture that fosters stewardship, customer focus, continuous improvement, teamwork, pride, and sense of community.
- 3 Promote effective communications and positive relationships.
- 4 Develop systems and processes that encourage partnerships and collaboration.
- 5 Appreciate and recognize self development, contribution, and accomplishment.
- 6 Strengthen the organization by learning about each other's jobs and how employee performance is linked directly to the budget and goals of the organization.

PROGRAM ELEMENTS:

- Leadership and Personal Development Programs
- Conflict and Stress Management Workshops
- Employee Suggestion Program
- Communications Training
- Partnering, Symposiums, and Process Mapping
- Succession Planning
- Employee Communications
- Station Stewardship Program (SSP)
- Personal Effectiveness Workshop

HIGHLIGHTS OF ACCOMPLISHMENTS

- The Performance and Learning Department provided training for new supervisors and managers, launched a new coaching service, delivered conflict and stress management training for over 300 front-line workers, and delivered communications and team building workshops for over 50 employees in the Operations Control Center.
- Completed process maps for all major business systems.
- Successfully launched a new improved Employee Suggestion Program in 2002.
- Completed a work plan for Succession Planning.
- "Operations in a Flash" newsletter continues to be published weekly, with over 50 issues in 2002.

employee development & stewardship

description

status

Leadership and Personal Development Programs New Supervisors Training and Orientation, which prepares new supervisors/managers for leadership responsibilities, is offered three times per year. This is followed by a one-week Leadership Development Training Program, which is offered three times per year. Performance and Stress Management workshops and individual coaching, based on HeartMath research and technology, is offered throughout the year.

Ongoing training and expansion of coaching services.

Conflict and Stress Management Workshops A series of custom-tailored workshops for front-line employees to reduce incidents of violence and conflict, improve personal safety, manage stress, and improve performance and customer service.

Completed an initial series of workshops as a part of Station Agent Re-certification training. Plan to continue workshops when funds are available.

Employee Suggestion Program A new, improved Employee Suggestion Program was developed by a cross-functional team based on an employee feedback survey and research on industry best practices.

Ongoing, with plans to provide for on-line submission of suggestions scheduled for Spring 2003. A new Program Guidebook was developed, a large cadre of suggestion evaluators were trained, and an extensive education and marketing program was launched the beginning of December 2002.

Communications Training Specifically designed communications training workshops for all staff in the Operations Control Center. Key learning objectives include developing greater awareness of personal communication style and its impact on customer service, and learning specific skills for more effective and positive communication at all levels of the organization.

Completed training for 80% of Operations Control Center staff in 2002, with balance of initial training planned for early 2003. Planning follow-up workshops based on participant's expressed needs.

Partnering, Symposiums, and Process Mapping Performance and Learning Department facilitates various partnering workshops, symposiums, and process mapping workshops; brings together a broad base of organizational stakeholders to address performance and system improvement issues; and builds teamwork among the varying interest groups.

Facilitated partnership workshops for Transit System Development to support successful completion of capital projects (e.g., system rehabilitation and AATC), facilitated Operations Training and Development symposiums to revamp training curriculum, and completed process maps of all major business systems.

Succession Planning Succession Planning allows the District to develop in-house talent and extend employee skills to serve the District's current and future needs. The intent is to reduce the District's need to seek outside sources to fulfill skills requirements. Additional funding will be required for program implementation.

A work plan was developed by the consultants and reviewed by the advisory group (line and staff managers). The roll out was not executed due to labor negotiations and no identification of funding for implementation.

employee development & stewardship

description

Employee Communications "Operations in a Flash" newsletter is written by BART employees to serve frontline employees by providing current BART news and information on a weekly basis and reinforcing the value of quality communication and positive relationships for quality customer service. "Operations in a Flash" is available electronically on WebBART and a hard copy is distributed to frontline employees. The newsletter continues to be published weekly with over 50 issues distributed in 2002. The Occupational Training web site is intended to provide online training programs to BART employees. Online training programs are planned for the future.

Station Stewardship Program (SSP) The SSP was promoted to all employees and includes action for employee communications, resources, employee incentives, and external customer incentives. Additionally, numerous District projects utilize innovative employee ideas and involvement to improve project implementation and service to our customers.

Personal Effectiveness Workshop Initiated by Rolling Stock and Shops (RSS), Personal Effectiveness Training provided guidance on workplace cooperation, successful teamwork, breaking down departmental and classification silos, and conflict resolution. All 700 RSS staff completed the two-day Personal Effectiveness training, in addition to a one-day Phase II Conflict Resolution class.

status

Systemwide delivery of the "Operations in a Flash" newsletter was initiated January 2002 and is delivered on a weekly basis.

SSP has been promoted to all employees. Numerous District projects utilize innovative employee ideas and involvement to improve project implementation and service to our customers, on an ongoing basis.

Conflict Resolution Instruction completed March 2002.

seismic retrofit program

PROGRAM >>

GOALS:

1. Bring the core system up to current seismic safety standards and achieve an operability goal that would enable the system to return to operations shortly after an earthquake event.

PROGRAM ELEMENTS:

- Seismic Vulnerability Study
- Caltrans Local Seismic Safety Retrofit Program
- Program Implementation
- Funding

HIGHLIGHTS OF ACCOMPLISHMENTS

- Obtained first increment of \$6 million from the Local Seismic Safety Retrofit Program (LSSRP), which will contribute an estimated total of \$150 million for the Seismic Retrofit Program.
- Obtained \$8.5 million out of total \$20.0 million Traffic Congestion Relief Program funding.
- Presented Seismic Vulnerability Study to the Board of Directors.
- Received approval of Seismic Vulnerability Study from PEER Review Panel and California Seismic Safety Commission.
- Achieved legislative approval for a California Environmental Quality Act (CEQA) exemption for Core System Retrofit.

seismic retrofit program

description

Seismic Vulnerability Study A comprehensive Seismic Vulnerability Study, which involved more than a year's work of engineering analysis, was completed in 2002. The Study provides the underpinnings for the Seismic Retrofit Program. The Seismic Vulnerability Study evaluated the risk from a major Bay Area earthquake at a nearby fault and identified retrofit strategies to enable the original system to withstand such a major earthquake. The Study further defined two possible programs, a \$1.2B "Systemwide Safety, Core System Operability" Program and a \$1.5B "Systemwide Safety, Systemwide Operability Program".

Caltrans Local Seismic Safety Retrofit Program Caltrans has implemented a program to fund seismic retrofit of local transportation facilities that could pose a risk to the operation of highways and streets in the event of an earthquake. BART has 227 such aerial structures, which cross over local roads scattered throughout the multi-county BART District. The "Systemwide Safety, Core System Operability" Seismic Retrofit Program incorporates the aerial structures identified in the Caltrans Local Seismic Safety Retrofit Program.

Program Implementation BART plans to implement the Seismic Retrofit Program in phases, with the Caltrans Local Seismic Safety Retrofit Program elements interspersed throughout the overall Program. First, BART will retrofit the Transbay Tube, a crucial element of the Core System. After this, priority will shift to the remainder of the Core System from the west portal of the Berkeley Hills Tunnel to Daly City Yard. These retrofits will create an operable segment, which can provide service quickly following a major earthquake. Finally, BART will retrofit additional trackway structures, stations, systems, administration, operations, and maintenance facilities.

Funding To date, BART has secured \$193 million from various sources for the Seismic Retrofit Program, including grant funds and BART funds. BART placed a \$1.05 billion General Obligation (GO) Bond measure on the November 2002 ballot in the three District Counties – Alameda, Contra Costa, and San Francisco. The GO Bond came just shy of securing the required two-thirds super-majority vote from the District. The SRTP financial forecast indicates significant economic uncertainty, which will effectively impede future BART contributions to the Seismic Retrofit Program. BART continues to pursue other funds including a portion of the third \$1-bridge toll surcharge being considered by the State Legislature and a Federal earmark. In addition, BART seeks the inclusion of the Seismic Retrofit Program in county transportation sales tax measure expenditure plans in San Francisco and Contra Costa counties. Alameda County's Measure B Reauthorization, passed by the voters in 2000, includes in Tier 2, over \$100 million for BART's Seismic Retrofit Program.

status

Presented to Board of Directors in June 2002. Approved by PEER Review Panel and California Seismic Safety Commission.

Memorandum of Understanding (MOU) executed May 2001.

BART received California Environmental Quality Act (CEQA) exemption for Core System Retrofit in September 2002. Exemption valid from January 2003 through June 2005.

Board adoption of the GO Bond Program Report and Resolution put the GO Bond on the ballot in July 2002.

GO Bond Measure Election achieved 64.2% combined approval in the three District counties in November 2002.

business advancement plan

PROGRAM >>

GOALS:

1. Support BART's modernization process by installing new business systems by the year 2010.

PROGRAM ELEMENTS:

- Business Advancement Plan
- Logistics & Inventory Management Master Plan

HIGHLIGHTS OF ACCOMPLISHMENTS

- RFPs for software selection for the Business Advancement Plan evaluated November 2002.
- Short list of software vendors for the Business Advancement Plan created December 2002.
- Bearingpoint, formerly KPMG Consulting, delivered the final recommendations for the Logistics & Inventory Management Master Plan Study on February 15, 2002.
- Initial assessment of current procedures and processes completed November 2001.

business advancement plan

description

Business Advancement Plan BART engaged the services of a consulting firm to review and analyze current business administrative processes and information needs of the District at all levels. BART will address information gathering and reporting schemes, both automated and manual, in the areas of Financial Management Information Systems, Human Resources Information Systems, timekeeping and payroll, fleet maintenance, fleet and operations workforce scheduling, document management systems, executive information systems, time management, and technical information generated from the District's train control system.

status

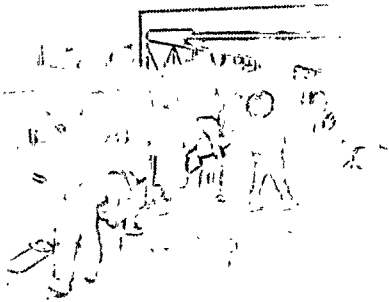
RFPs for software selection evaluated November 2002. Short list of vendors created December 2002. Vendor demonstrations complete January 2003. Software selection finalized February 2003.

Logistics & Inventory Management Master Plan The object of this study is to create an integrated Logistics and Inventory Management Master Plan for the District to address its physical infrastructure and inventory requirements. The Study will evaluate the District's needs over an initial 10-year projected period, with an overall goal of a 30-year projected period. Areas to be addressed include determining the District's current and future needs for logistic support, developing a model to meet the defined needs, comparing the model with BART's existing system, and developing strategies to implement the model. The District's Logistics & Inventory Management Master Plan study, which was intended to outline a strategy for maintaining the System's physical infrastructure and inventory needs into the future, has been completed. One of the key elements outlined in the list of recommendations was the need to replace existing business applications with modern, up-to-date integrated system applications. The new business software would, for example, allow for the integration of the logistics, inventory, maintenance, and procurement functions, as is more commonplace in the industry, today. Therefore, this initiative is being subsumed within the broader context of the overall business advancement plan.

Finalized
Recommendations
received February 2002.

system capacity

PROGRAM >>



GOALS:

- 1 Create the capacity for the BART core system to carry 500,000 average weekday riders by 2025.

PROGRAM ELEMENTS:

- System Capacity Study (SCS)
 - Line Capacity Expansion
 - Station Capacity Expansion
- San Jose Extension Capacity Impacts
- Advanced Automatic Train Control (AATC)
- Shop Expansions
- Automatic Fare Collection (AFC) Expansion
- Track Improvement Projects
- New Revenue Vehicle Design
- New Vehicle Procurement

HIGHLIGHTS OF ACCOMPLISHMENTS

- Identified major system capacity bottlenecks:
 - Stations
 - M-Line from Daly City through the Transbay Tube
 - Vehicles & Shops
- Conceptualized three phases of investment:
 - Short-term projects underway
 - Mid-term stretch
 - Longer-term major regional investments
- Procured 82 new fare gates and 40 ticket vending machines for systemwide capacity expansion, and commenced installation of additional fare gates in August 2002.

system capacity

description

status

System Capacity Study (SCS) The second of three 30-year studies, the System Capacity Study looks at the bottlenecks in the system that limit capacity, and will identify targeted investments for optimal capacity benefit. The goal of this study is to determine which investments will be necessary to accommodate continuing core system ridership growth, while maintaining reliable operations and improving the system's ability to quickly recover from service disruptions.

- **Line Capacity Expansion** The first phase of the SCS identified bottlenecks in line capacity and evaluated the maximum train throughput and passenger carrying capacity at the most constraining portion(s) of the system.
- **Station Capacity Expansion** As part of the SCS, BART has embarked on a systematic analysis of station capacity, beginning with the modeling of passenger flow through the Balboa Park Station. A simulation model was developed to evaluate the capacity impacts of the proposed changes to platform capacity, vertical circulation, and fare gates. A list of recommended level-of-service standards was also created as part of the study.

Phase I, Line Capacity analysis completed December 2002.

Balboa Park study completed December 2002.

VTA Core System Impacts BART is conducting a Core System Impact Study to analyze the impact to BART's system capacity from the SVRT Project. The study is evaluating the impacts of additional ridership at existing and planned BART stations. It will address the required projects to mitigate these impacts and estimate the project costs, which will become part of the capital costs of the SVRT Project, as reported in the environmental impact statement/environmental impact report (EIS/EIR).

SVRT EIR/EIS completion in Spring 2004

Advanced Automatic Train Control (AATC) AATC, which is part of the Renovation Program, has significant system capacity expansion, as well as renovation components. AATC is an integral part of BART's overall approach to increasing system capacity.

See Renovation Program.

Shop Expansions As part of the Fleet Management Plan (FMP), BART has embarked on a systematic analysis of future shop capacity needs in order to maintain the current and future fleet. An aggressive fleet-wide periodic overhaul program is also being evaluated to address vehicle reliability issues.

See Renovation Program.

AFC Expansion In addition to replacing existing automatic fare collection (AFC) equipment, BART has procured additional fare gates, ticket vending machines, and add-fares to expand core system passenger handling capacity. BART has funding to install 82 additional fare gates, as part of the replacement equipment rollout, and is currently seeking funding to install 40 additional ticket vending machines. The introduction of TransLink Smart Cards may also increase the number of passengers the system is capable of handling.

New fare gate installation complete by January 2004. TransLink to be implemented by 2004.

Track Improvement Projects Three projects for expanding system capacity by constructing track improvements have been identified and are proceeding through engineering evaluation. These projects, cross-overs at Richmond and Pleasant Hill stations, and creation of terminal zones at Pittsburg/Bay Point Station, have the potential for reducing the number of trains necessary to implement scheduled rail service, thereby freeing those cars to provide some additional service in the form of more and/or longer trains.

Pleasant Hill and Richmond pre-evaluation completed May 2002. Cost estimate (both crossovers) completed October 2002. Pittsburg/Bay Point pre-evaluation completed June 2002.

system capacity

description

New Revenue Vehicle Design A Revenue Vehicle Vision Team explored design concepts for the next BART vehicles to be purchased, either for extensions or simply to handle ridership increases. Vehicle design affords opportunities to increase system capacity by using new seating arrangements, and by increasing the number of doors and reducing door obstructions to reduce station dwell times. The development of the contract specification continued through June 2002. However, work was discontinued after VTA's decision to postpone their project for 22 months. Booz Allen & Hamilton has submitted a status of the contract specification documents, as well as other contract deliverables.

New Vehicle Procurement A Fleet Management Plan (FMP) is currently in progress to address future fleet needs, as they relate to core system growth, future extension vehicle procurement, and fleet replacement.

status

Meetings with car builders completed in June.

No further activity expected before May 2004.

Study initiated Winter 2002.

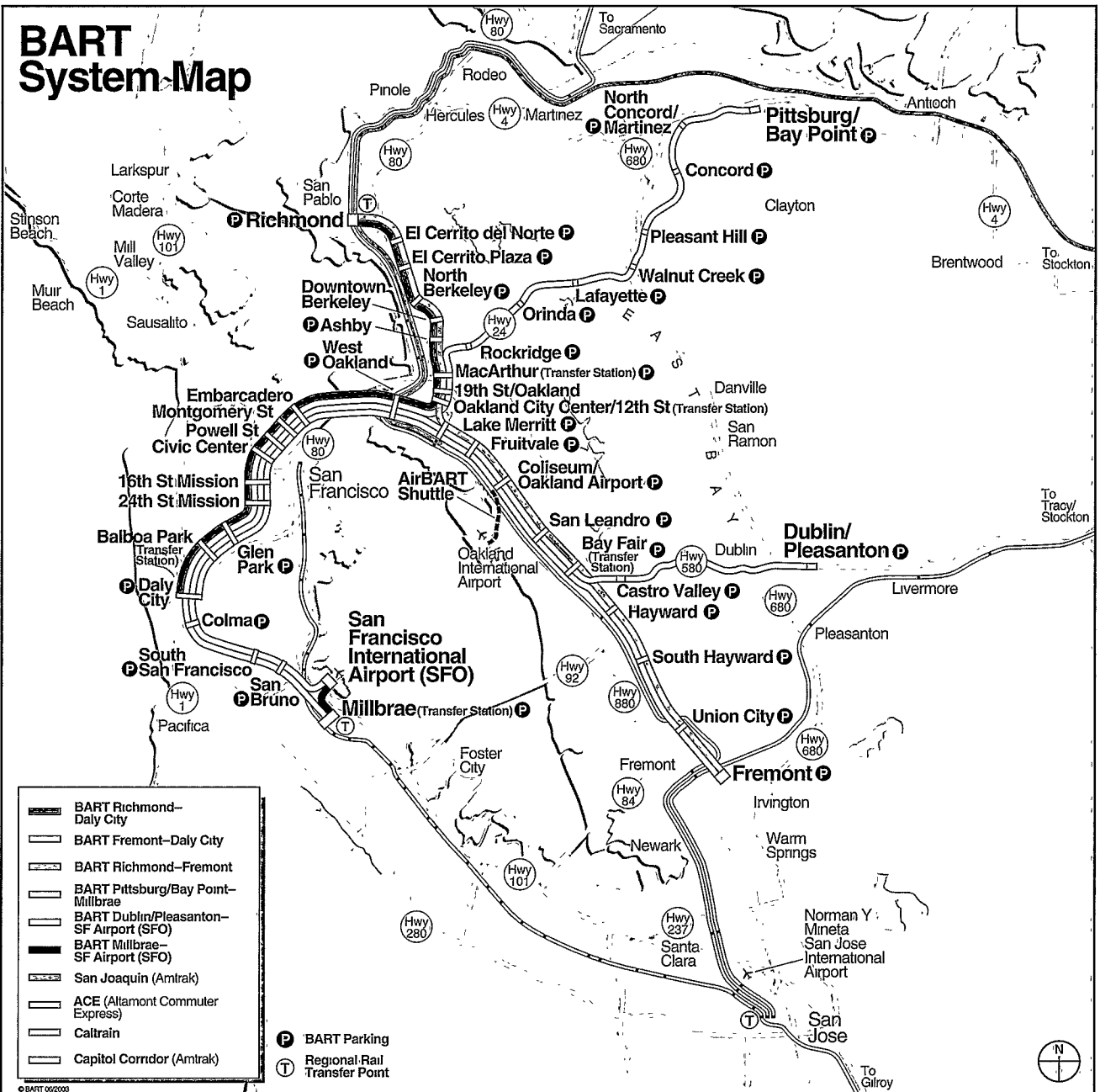
Key Indicators











Fiscal Year	Actual					Projections / <i>Benchmarks (in italics)</i>				
	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012
BART System Characteristics										
District Population (millions)	3.03	3.06	3.16	3.17	3.24	3.30	3.37	3.42	3.47	3.51
Annual Ridership (thousands)	73,175	72,447	75,668	91,092	90,797	98,538	105,553	109,905	112,391	114,966
Avg. Weekday Ridership (thousands)	252.0	248.7	265.3	310.3	310.7	332.9	356.9	371.3	379.7	388.4
District Employment (thousands)	1,455	1,465	1,559	1,629	1,619	1,815	1,859	1,913	1,967	2,012
Route Miles	72	75	95	95	95	104	104	104	104	104
Number of Stations	34	36	39	39	39	43	43	43	43	43
Access/Mode Shares*										
Drive Alone	35%	35%	38%	38%	38%	38%	33%	33%	31%	31%
Dropoff, Carpool, Taxi	20%	20%	16%	16%	16%	16%	19%	19%	20%	20%
Transit	21%	21%	21%	21%	21%	21%	22%	22%	22%	22%
Bike	1%	1%	2%	2%	2%	2%	2%	2%	3%	3%
Walk	24%	24%	23%	23%	23%	23%	24%	24%	24%	24%
Fleet Size	612	669	669	669	669	669	669	669	669	669
Line Haul Capacity	360,000	360,000	360,000	360,000	360,000	363,300	366,600	370,000	390,000	410,000

Key Indicators

Fiscal Year	Actual					Projections / Benchmarks (in italics)				
	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012
Service Measures										
Customer Satisfaction (% satisfied)	NA	80%	74%	78%	80%	80%+	80%+	80%+	82%+	82%+
On-Time Performance (customers)	93.5%	93.3%	95.7%	95.4%	96.1%	94%+	94%+	94%+	96%+	96%+
Vehicle Reliability (mean hours between service delays)	1258	913	1289	1235	1597	1700	1900	2100	2300	2300
Financial Information										
Operating Ratio	52%	56%	60%	68%	63%	60%+	60%+	60%+	60%+	60%+
Cost/Passenger Mile	\$0.228	\$0.255	\$0.289	\$0.257	\$0.277	< \$0.25	< \$0.25	< \$0.25	< \$0.25	< \$0.25

BART System Map



-  BART Richmond-Daly City
-  BART Fremont-Daly City
-  BART Richmond-Fremont
-  BART Pittsburg/Bay Point-Millbrae
-  BART Dublin/Pleasanton-SF Airport (SFO)
-  BART Millbrae-SF Airport (SFO)
-  San Joaquin (Amtrak)
-  ACE (Altamont Commuter Express)
-  Caltrain
-  Capitol Corridor (Amtrak)

 BART Parking
 Regional Rail Transfer Point