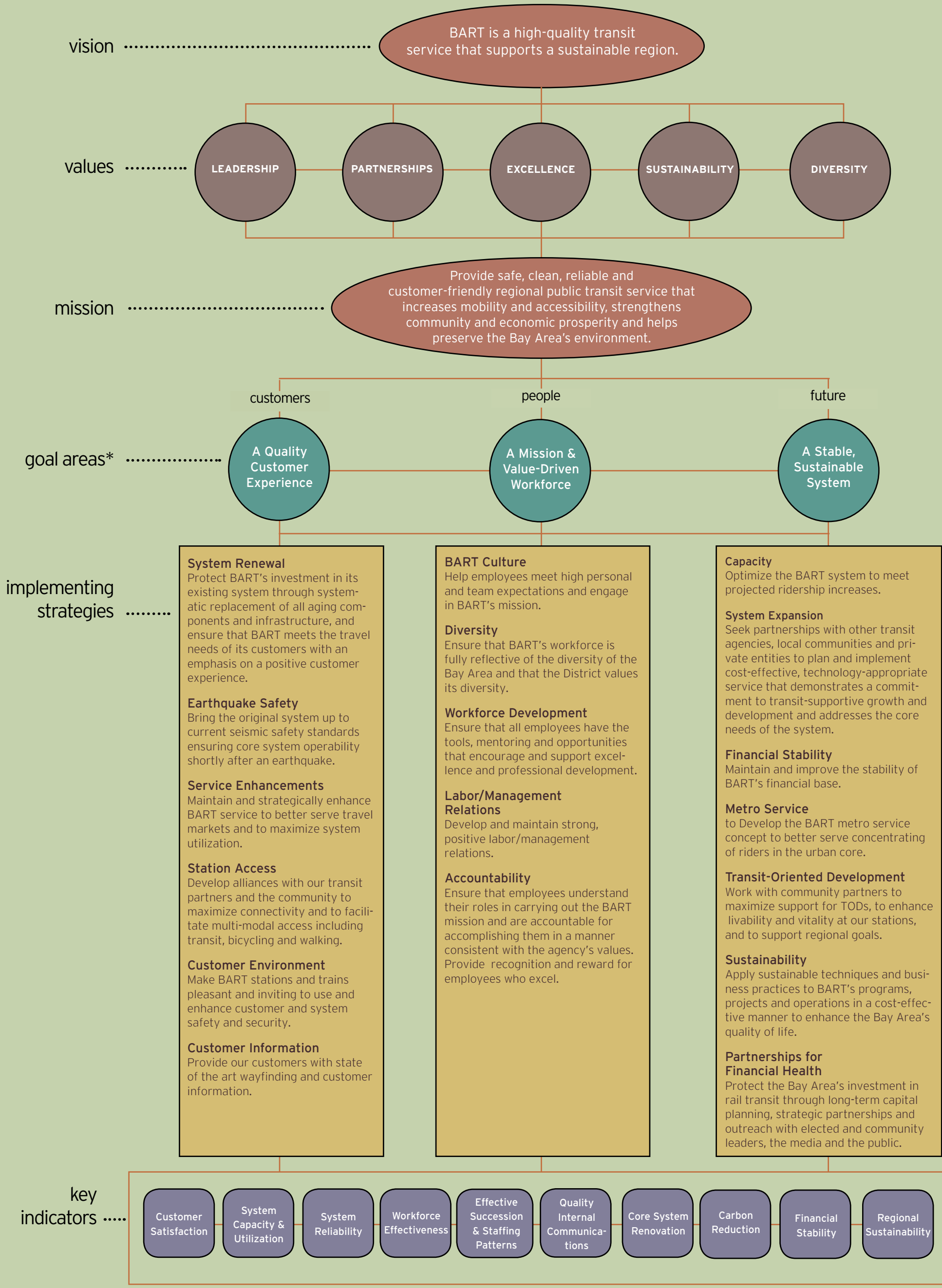




# STRATEGIC PLAN

Adopted October, 2008

our future



\* Called "focus areas" in the current strategic plan document. The seven previous focus areas were combined to form the three goal areas.



Implementing Strategies	Projects & Programs	Desired Outcomes	Key Indicators																
<p><b>System Renewal</b> Protect BART's investment in its existing system through systematic replacement of all aging components and infrastructure, and ensure that BART meets the travel needs of its customers with an emphasis on a positive customer experience.</p>	<p><b>System Renovation Plan:</b> Develop a prioritized list of renovation projects with a funding plan, including implementation schedule, cash flow analysis and key milestones. Plan will include core infrastructure renovation, existing fleet renovation or replacement, security, mandatory service and capacity modifications and quality enhancement.</p>	<ul style="list-style-type: none"> <li>Develop a prioritized system renovation plan, including a funding element, by 2010.</li> <li>Develop a phasing plan.</li> </ul>	<ul style="list-style-type: none"> <li>Customer Satisfaction</li> <li>System Capacity &amp; Utilization</li> <li>Core System Renovation</li> <li>System Reliability</li> <li>Financial Stability</li> </ul>																
	<p><b>Rail Vehicle Replacement Program:</b> Replace all existing rail cars; purchase expansion vehicles as funding becomes available.</p>	<ul style="list-style-type: none"> <li>Develop full funding plan for vehicle replacement program by FY 2009.</li> <li>Notice to Proceed (NTP) issued in 2010; full production commences in 2016; seven-year production phase anticipated.</li> </ul>																	
	<p><b>Strategic Maintenance Plan (SMP):</b> Utilize best-practices maintenance management principles Districtwide to improve system reliability, extend equipment service life, and gain maintenance cost and schedule efficiencies.</p>	<ul style="list-style-type: none"> <li>Implement a schedule-driven maintenance program designed to optimize component and system life to avoid end-of-life failures.</li> <li>Complete implementation in the secondary repair shops by December 2009. Complete 50% implementation in the primary shops by December 2010.</li> <li>Define vehicle level rebuild program by December 2009.</li> <li>Develop schedule and strategy by June 2009 to extend SMP to Maintenance and Engineering.</li> </ul>																	
	<p><b>Infrastructure Evaluation Study:</b> Undertake a comprehensive evaluation of District infrastructure.</p>	<ul style="list-style-type: none"> <li>Complete study by 2011; identify funding for additional phases.</li> </ul>																	
	<p><b>District Operations Support Facilities Study:</b> Perform a comprehensive analysis of facility requirements to support current and future operations.</p>	<ul style="list-style-type: none"> <li>Complete study by 2010, if funding becomes available.</li> </ul>																	
	<p><b>Business Advancement Plan Phase II:</b> Develop functional requirements that underlie Maintenance and Material Management as well as Financial Management. Functional areas include: procurement, inventory management, asset management, budgeting, accounting and related reporting.</p>	<ul style="list-style-type: none"> <li>Complete implementation of BAP Phase II</li> </ul>																	
<p><b>Earthquake Safety</b> Bring the original system up to current seismic safety standards ensuring core system operability shortly after an earthquake.</p>	<p><b>BART's Earthquake Safety Program:</b> Retrofit core system to meet operability standards and retrofit remainder of system to meet Life Safety standards.</p>	<ul style="list-style-type: none"> <li>Complete Earthquake Safety Program by January 2014.</li> </ul>	<ul style="list-style-type: none"> <li>System Reliability</li> <li>Financial Stability</li> </ul>																
<p><b>Service Enhancements</b> Maintain and strategically enhance BART service to better serve travel markets and to maximize system utilization.</p>	<p><b>BART Core Services:</b> Provide service levels that meet the needs of the customers while maintaining optimum system reliability.</p>	<ul style="list-style-type: none"> <li>Maintain additional weekend and evening service.</li> <li>Increase weekday off-peak ridership by 2015.</li> <li>Maintain 95% on-time performance.</li> <li>Increase Mean Time Between Failures</li> </ul>	<ul style="list-style-type: none"> <li>Customer Satisfaction</li> <li>System Capacity &amp; Utilization</li> <li>Regional Sustainability</li> </ul>																
	<p><b>Demand Management:</b> Optimize BART system to serve peak hour weekday riders.</p>	<ul style="list-style-type: none"> <li>Conduct Transportation Demand Management study and develop plan for implementation by 2010.</li> </ul>																	
	<p><b>Smart Card Program:</b> Implement an all smart card fare system to make it easier for customers to purchase, store and use fares.</p>	<ul style="list-style-type: none"> <li>Phase out magnetic strip tickets as funding permits.</li> </ul>																	
<p><b>Station Access</b> Develop alliances with our transit partners and the community to maximize connectivity and to facilitate multi-modal access including transit, bicycling and walking.</p>	<p><b>Station Access Program:</b> Develop a package of programs and projects to improve access to our stations by modes other than single occupant vehicles.</p>	<ul style="list-style-type: none"> <li>Depending on Station Profile Survey, develop plan by 2010 to meet or exceed system-wide access targets specified in 2003 Station Access Guidelines:  <table border="0" style="margin-left: 20px;"> <tr> <td>Pedestrian</td><td>24.5%</td> <td>Transit</td><td>22.0%</td> <td>Taxi</td><td>1.5%</td> <td>Carpool</td><td>5.5%</td> </tr> <tr> <td>Bicycle</td><td>3.0%</td> <td>Drop off/Pick up</td><td>12.5%</td> <td>SOV</td><td>31.0%</td> <td></td><td></td> </tr> </table> </li> <li>Establish station specific access targets by 2010.</li> <li>Implement 4 model access stations by 2010.</li> </ul>	Pedestrian	24.5%	Transit	22.0%	Taxi	1.5%	Carpool	5.5%	Bicycle	3.0%	Drop off/Pick up	12.5%	SOV	31.0%			<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Carbon Reduction</li> <li>Customer Satisfaction</li> <li>Regional Sustainability</li> </ul>
	Pedestrian	24.5%	Transit	22.0%	Taxi	1.5%	Carpool	5.5%											
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<p><b>Station Wayfinding Program:</b> Implement wayfinding signage to and from BART stations and within the station, to aid the customer in navigating the BART system and in making connections to other transit and local destinations.</p>	<ul style="list-style-type: none"> <li>Incorporate station signage improvements into Station Modernization Program.</li> <li>Implement a prototype signage improvement program by 2010.</li> <li>In collaboration with cities, develop and implement wayfinding signage directing customers to local BART stations, as funding becomes available.</li> </ul>																		
<p><b>Customer Environment</b> Make BART stations and trains pleasant and inviting to use and enhance customer and system safety and security.</p>	<p><b>Station Modernization Program:</b> Upgrade BART stations to improve lighting, pathways, and signage systems.</p>	<ul style="list-style-type: none"> <li>Award construction contracts for the replacement of 480 volt switch gear at 15 stations and modernization of 4 stations by June 2009.</li> </ul>	<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Customer Satisfaction</li> </ul>																
	<p><b>Universal Design:</b> Incorporate universal design principals into planning for BART renovation, expansion, and improvement.</p>	<ul style="list-style-type: none"> <li>Develop specific guidelines on the inclusion of universal design concepts in BART facilities.</li> </ul>																	
	<p><b>Accessibility Improvements:</b> Develop and implement program of system-wide accessibility improvements as opportunities and funding become available</p>	<ul style="list-style-type: none"> <li>Based on guidelines for universal design, and in consultation with the BART Accessibility Task Force and the disability community of the Bay Area, develop prioritized recommendations for specific projects to enhance and improve the accessibility of BART facilities.</li> </ul>																	
	<p><b>BART Police Program:</b> Staff and deploy a professional and well-trained police force.</p>	<ul style="list-style-type: none"> <li>Maintain the rate of Part 1 crimes against persons at or below 2.00 crimes per million passenger trips per quarter. Identify and procure available local, state and federal grants to complete security projects.</li> <li>Maintain average emergency response time at 4 minutes or less.</li> <li>Maintain an overall police presence of at least 13% to 14% based on Passenger Environment Survey (PES) statistics.</li> </ul>																	
	<p><b>BART Security Programs:</b> Focus on infrastructure protection and training front-line employees.</p>	<ul style="list-style-type: none"> <li>Current and future training opportunities are maximized through BART, state and federal programs</li> </ul>																	
	<p><b>Station Cleanliness Program:</b> Adequately staff program to ensure that station and bathroom cleanliness meets the standards of BART passengers.</p>	<ul style="list-style-type: none"> <li>Increase the rating of "station cleanliness" by BART customers.</li> </ul>																	
	<p><b>Train Cleanliness Program:</b> Adequately staff program to ensure that interior and exterior train cleanliness meets the standards of BART passengers.</p>	<ul style="list-style-type: none"> <li>Increase the rating of "train cleanliness" by BART customers.</li> </ul>																	
<p><b>Train Interior Upgrade:</b> Replace vehicle carpets with composite flooring designed for easier cleaning and maintenance.</p>	<ul style="list-style-type: none"> <li>Complete 100% installation of new composite floors by 2011.</li> </ul>																		



# customers



Adopted October, 2008

Implementing Strategies	Projects & Programs	Desired Outcomes	Key Indicators
<p><b>Customer Information</b> Provide our customers with state of the art wayfinding and customer information.</p>	<p><b>Branding Initiative:</b> A package of changes to BART communications, initiatives and services to position BART as “a better day for you and the environment.”</p>	<ul style="list-style-type: none"> <li>▶ By 2009, develop and launch a uniform look, feel, and voice for BART communications, including enhancements to bart.gov. Develop a plan for companion initiatives to reinforce the brand position.</li> </ul>	<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Customer Satisfaction</li> <li>Carbon Reduction</li> </ul>
	<p><b>Real time information Program:</b> Expand real time BART train and bus arrival and emergency information to aid customers.</p>	<ul style="list-style-type: none"> <li>▶ Implement real time information through the interactive voice response system in the Transit Information Center and Trip Planning system on the BART website by 2009. Implement real time information pilot program at a minimum of 3 stations by 2010. Expand program to 10 additional stations by 2013, as funding permits.</li> </ul>	



Implementing Strategies	Projects & Programs	Desired Outcomes	Key Indicators
<p><b>BART Culture</b> Help employees meet high personal and team expectations and become engaged in BART's mission.</p>	<p><b>Policy and Procedure Program:</b> BART will strive to have well-articulated, clearly understood and accessible communication as to matters of rights, benefits, decision-making that affect employees.</p>	<ul style="list-style-type: none"> <li>Fully develop and update HR manual by 2009.</li> <li>Conduct training on HR manual and associated values for all non-rep and managers by 2011.</li> </ul>	
	<p><b>Communication Program:</b> BART will ensure input from stakeholders in development and training for initiatives involving BART employees generally, and in specific areas of BART or life in the BART workplace.</p>	<ul style="list-style-type: none"> <li>Involve employees in developing programs and projects that affect their work.</li> </ul>	 
	<p><b>Applicant Assistance and Feedback Program:</b> Assistance to applicants for employment is readily available and internal applicants not selected in a hiring process can request and receive feedback to assist in future preparations.</p>	<ul style="list-style-type: none"> <li>Provide feedback and advice to 100% of internal applicants who request it by 2011.</li> </ul>	
	<p><b>Customer Service Program:</b> Institute a comprehensive program to promote customer-friendly service from all staff.</p>	<ul style="list-style-type: none"> <li>Encourage the extension of customer service as a priority for "back office" BART functions; modify procedures and provide training as appropriate.</li> </ul>	
	<p><b>Internal Customer Service Program:</b> Develop and implement measures of service satisfaction among internal stakeholders at BART.</p>	<ul style="list-style-type: none"> <li>Develop internal customer service survey as companion to external survey to provide data on service quality by non-ops groups within BART. Develop baseline data by 2010.</li> </ul>	
	<p><b>Emerging Workforce Program:</b> Ensure that BART is prepared for and can effectively utilize all sectors of a changing workforce.</p>	<ul style="list-style-type: none"> <li>Research and understand the work ethics, goals and aspirations of the several generations that will be in the workforce over the coming years in order for BART to attract and effectively use all sectors.</li> </ul>	
<p><b>Diversity</b> Ensure that BART's workforce is fully reflective of the diversity of the Bay Area and that the District values its diversity.</p>	<p><b>Employment Outreach Program:</b> Ensure that all recruiting is defined in through utilization statistics and that there is outreach to all communities in the BART district.</p>	<ul style="list-style-type: none"> <li>Use utilization statistics to support recruiting decisions in 100% of job requisitions by 2010.</li> <li>Expand and maintain scope of recruiting to include varied communities by 2010.</li> <li>Achieve annual improvement in statistics on utilization in all major EEO classifications in areas where BART is currently underrepresented by 2010.</li> </ul>	 
	<p><b>Diversity Awareness Program:</b> Ensure that all employees are knowledgeable about the benefits and challenges of working in a culturally diverse environment.</p>	<ul style="list-style-type: none"> <li>Complete basic Diversity Awareness Workshops for 100% of District employees by 2011.</li> </ul>	
<p><b>Workforce Development</b> Ensure that all employees have the tools, mentoring and opportunities that encourage and support excellence and professional development.</p>	<p><b>Leadership Development Program:</b> Provide management development opportunities through rotational work assignments. Continue to refine the Leadership Symposium Program including addition of academic framework.</p>	<ul style="list-style-type: none"> <li>Ensure that BART maintains a strong, qualified pool of internal candidates.</li> </ul>	 
	<p><b>Informational Training Programs:</b> Provide a variety of short courses for managers on issues that are secondary aspects of their jobs.</p>	<ul style="list-style-type: none"> <li>Provide a regular curriculum of at least 10 half-day courses by FY 2011.</li> </ul>	
	<p><b>Career Mobility Program:</b> Establish guidelines for flexibility in filling positions internally to include lower initial knowledge/experience requirements coupled with specific development plans.</p>	<ul style="list-style-type: none"> <li>Ensure that at least 10 mobility options are created and utilized by managers by FY 2010. Increase internal promotions by 5% by FY 2011.</li> </ul>	
<p><b>Labor/Management Relations</b> Develop and maintain strong, positive labor/management relations.</p>	<p><b>Labor/Management Relationship Program:</b> Conduct a series of meetings between union leaders and executive management to foster communication and a greater understanding of issues and concerns.</p>	<ul style="list-style-type: none"> <li>Negotiate new labor contracts in 2009.</li> </ul>	 
	<p><b>Management Training:</b> Conduct agency-wide training to foster greater understanding among management of contract terms provisions.</p>	<ul style="list-style-type: none"> <li>100% of managers will receive training on contract interpretation and administration by 2010 (20% of managers to receive training by FY 2009.)</li> </ul>	
<p><b>Accountability</b> Ensure that employees understand their roles in carrying out the BART mission, and are accountable for accomplishing them in a manner consistent with the agency's values. Provide for recognition and reward of employees who excel.</p>	<p><b>Performance Planning and Evaluation Program:</b> Measure performance against the mission and values of the District through annual performance evaluations.</p>	<ul style="list-style-type: none"> <li>Initiate steps by 2010 to support a process whereby ratings for individuals are correlated with the overall performance of the work group of which they are a part.</li> <li>Establish baseline data of performance quality measures during 2010.</li> <li>Initiate performance-based compensation on a limited or trial basis, to include a team component, in 2011.</li> </ul>	  





Implementing Strategies	Projects & Programs	Desired Outcomes	Key Indicators
<b>Capacity</b> Optimize the BART system to meet projected ridership increases.	<b>SVRT Core Modification Study:</b> Complete comprehensive analysis of system and station capacity needs required to accommodate the Silicon Valley Rapid Transit (SVRT) project by 2009.  <b>Car Modifications:</b> Increase train car capacity.	<ul style="list-style-type: none"> <li>Complete station capacity plans for 9 stations by 2009.</li> <li>Implement train car modification program as a near-term strategy for enhancing capacity by 2011 if funded.</li> <li>Purchased replacement fleet with higher capacity.</li> </ul>	
<b>System Expansion</b> Seek partnerships with other transit agencies, local communities and private entities to plan and implement cost-effective, technology-appropriate service that demonstrates a commitment to transit-supportive growth and development and addresses the core needs of the system.	<b>eBART Project:</b> Expand BART rail service to eastern Contra Costa County.  <b>Warm Springs Project:</b> Extend BART service over five miles in Fremont.  <b>Silicon Valley Rapid Transit (SVRT) Project:</b> Extend BART service over 16 miles into Santa Clara County.  <b>Livermore Project:</b> Extend BART service to Livermore.  <b>West Dublin/Pleasanton Station:</b> Add infill station along L line.  <b>Oakland Airport Project:</b> Connect the Oakland Airport to the BART system.	<ul style="list-style-type: none"> <li>Begin eBART revenue service by 2015.</li> <li>Complete Warm Springs by 2014.</li> <li>In partnership with the Santa Clara Valley Transportation Authority, assist in the implementation and completion of the Silicon Valley extension by 2018.</li> <li>Adopt EIR and select preferred alternative for Livermore project by 2009.</li> <li>Complete in 2009.</li> <li>TBD</li> </ul>	<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Financial Stability</li> <li>Regional Sustainability</li> </ul>
<b>Financial Stability</b> Maintain and improve the stability of BART's financial base.	<b>Productivity-Adjusted CPI-based Fare Increases:</b> Continue biennial productivity adjusted CPI-based fare increases.  <b>Planning for a Fiscally Sound Future:</b> Develop financial forecasts to identify and plan for future revenue needs and expenditures, and allocations to capital and reserves.  <b>Revenue Generation:</b> Implement a variety of programs to increase non-farebox revenues, including advertising, transit-oriented development and concessions.  <b>Strategic Energy Plan:</b> Procure low-cost, clean and reliable electricity for the BART system and continuously reduce the District's use of electricity.	<ul style="list-style-type: none"> <li>Maintain an operating ratio of 62% or above.</li> <li>Maintain 67% of survey respondents rating BART as a good value for the money.</li> <li>Maintain the annual increase in operating costs per passenger miles at or below the 10-year rate of inflation.</li> <li>Develop and adopt a balanced annual budget.</li> <li>Develop and adopt a Short-Range Transit Plan and Capital Improvement Program in accordance with MTC Guidelines.</li> <li>Maintain operating reserve of at least 5% of total annual operating expenses.</li> <li>Develop and adopt a District debt policy.</li> <li>Increase the percentage of non-farebox revenues as a part of total BART revenues.</li> <li>Quadruple advertising revenue within 10 years.</li> <li>Maintain cost of independent power supply arrangements at less than cost of comparable PG&amp;E service.</li> <li>Develop and maintain a portfolio of diversified market supply.</li> <li>Invest in efficient generation facilities to reduce reliance on market supply.</li> <li>Participate in ABAG Energy Watch Program to reduce District energy use.</li> <li>Continue to procure cost-effective renewable energy supplies.</li> </ul>	<ul style="list-style-type: none"> <li>Financial Stability</li> <li>Customer Satisfaction</li> </ul>
<b>Metro Service</b> Develop the BART Metro service concept to better serve concentrations of riders in the urban core.	<b>Core System Service:</b> Provide more frequent service in the urban core ("show up and go") to meet the travels demands of the market.  <b>Expansion of Rail Through Linkages:</b> Serve suburban and exurban markets by strategic linking to other systems.	<ul style="list-style-type: none"> <li>Define service plan to provide more service in the core during the times most needed while maintaining adequate levels for suburban communities.</li> <li>Through the Regional Rail Plan, define a plan to create linkages with other systems to expand service beyond BART's core service area.</li> </ul>	<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Carbon Reduction</li> </ul>
<b>Transit-Oriented Development</b> Work with community partners to maximize support for TODs, to enhance the livability and vitality at our stations, and to support regional goals.	<b>Station Planning Program:</b> In cooperation with cities and local communities, conduct station planning to determine the appropriate level of development on and near BART station property. These plans will also include prioritized access improvements and funding plans.  <b>TOD Station Development Program:</b> Working with cities and local communities, implement approved development projects.	<ul style="list-style-type: none"> <li>Complete 6 station area plans by 2011.</li> <li>Obtain development approvals at six station areas by 2013.</li> <li>Complete construction of transit-oriented developments at eight BART stations by 2013.</li> </ul>	<ul style="list-style-type: none"> <li>System Capacity &amp; Utilization</li> <li>Carbon Reduction</li> <li>Financial Stability</li> <li>Regional Sustainability</li> </ul>
<b>Sustainability</b> Apply sustainable techniques and business practices to BART's programs, projects and operations in a cost-effective manner to enhance the Bay Area's quality of life.	<b>Transit Sustainability Guidelines:</b> Build consensus among transit operators for reducing greenhouse gas emission, and utilizing sustainability techniques.  <b>Greenhouse Gas Emissions Targets:</b> Reduce GHG emissions per BART vehicle mile.  <b>Bay Area VMT Reduction Target:</b> Contribute to Bay Area reduction in VMT.  <b>BART Water Consumption Target:</b> Reduce District water consumption.	<ul style="list-style-type: none"> <li>Develop Transit Sustainability Guidelines by 2009.</li> <li>Implement guidelines through pilot projects such as Station Modernization Program, and New Car Procurement specifications by 2010.</li> <li>Sustainability Committee to establish targets in 2009/10.</li> <li>Work with Bay Area transportation and air quality agencies to reduce vehicle miles traveled (VMT) per capita in the Bay Area.</li> <li>Sustainability Committee to establish target in 2009/10.</li> </ul>	<ul style="list-style-type: none"> <li>Carbon Reduction</li> <li>Regional Sustainability</li> </ul>



Implementing Strategies	Projects & Programs	Desired Outcomes	Key Indicators
<p><b>Partnerships for Financial Health</b> Protect the Bay Area's investment in rail transit through long-term capital planning, strategic partnerships and outreach with elected and community leaders, the media and the public.</p>	<p><b>Ridership Development Plan:</b> Develop and execute a Ridership Development Plan to build commute, off-peak and reverse ridership.</p>	<ul style="list-style-type: none"> <li>▶ Complete plan to achieve ridership projection and system utilization by 2009.</li> </ul>	<p>Financial Stability</p> <p>System Capacity &amp; Utilization</p>
	<p><b>Legislative and Community Outreach Program:</b> Develop and implement a federal, state and local legislative and community outreach program to increase funding and community support for key BART initiatives.</p>	<ul style="list-style-type: none"> <li>▶ Increase BART's share of federal funding through formula and program changes during reauthorization of the surface transportation law. Seek new sources of funding through any federal climate change legislation or other state and local initiatives.</li> </ul>	
	<p><b>Media Relations Public Awareness Program:</b> Nurture positive relationships with media outlets and shape media and public opinion to build support for BART's initiatives and reputation.</p>	<ul style="list-style-type: none"> <li>▶ Visit each major Bay Area newsroom once per year.</li> <li>▶ Add two new media contacts each month.</li> <li>▶ Meet with editorial boards and place at least six op-ed pieces per year.</li> <li>▶ Identify new media for communicating with customers and public.</li> </ul>	
	<p><b>Employer Transit Forum:</b> Recognize and cultivate a closer relationship with the employers we serve.</p>	<ul style="list-style-type: none"> <li>▶ Recruit 20 businesses per year to participate in an annual forum to build ridership, support for BART initiatives, and loyalty with our customers.</li> </ul>	