

Ongoing Efforts

- ◆ Power savings
- ◆ Asset replacement study
- ◆ Funding for capital program

Status

BART's financial situation is healthy, with capital revenues coming from a variety of sources. Fare revenues are growing along with ridership, and sales tax revenues are solid during this period of economic growth. We have been successful in obtaining grants for our capital projects such as the San Francisco Airport Extension and the system renovation program. We work closely with MTC and other regional and local transit partners to secure the funding required to enhance service for the region's riders.

Board and staff are committed to maintaining our financial stability through judicious planning and prudent fiscal management. The asset replacement study now under way will identify a permanent reinvestment rate necessary to maintain and operate the system safely and reliably. Staff efforts to reduce the cost of our electrical power have resulted in a \$6 million annual reduction, and proceedings at the California Public Utilities Commission may result in further savings.

While sanguine, BART's financial situation requires vigilance and efforts at improvement. We are committed to improving our long term capital planning. We are also concerned about stability of revenues and effective evaluation of the financial aspects of expansion opportunities.

Financial Health

New Initiatives



Knowing where we are and where we are going financially with capital and operating revenues and expenses which are balanced, predictable, stable, sustainable, and sufficient to meet our standards and goals . . .

Ron Avery	Scott Schroeder
Joe Evinger	Marvin Snow
Mike Flaherman	Beth Tripp
Sylvia Hemmerich	Rob Umbreit
Gregg Marrama	Joe Wong

Action Plan	Summary of Work Plan*	Responsible Organizations
Establish a Valid Comprehensive Analysis of System Expansion Impacts	Be prepared in FY 2001 to conduct integrated and accurate analysis of financial, ridership and operational impacts of potential system expansions, as a support to political discussions and negotiations. Significant attention should be directed to analysis of options, because decisions made during extension planning have significant long-term impacts on the Districts financial health and overall positioning as a Bay Area transportation resource.	Transit Systems Development Budget and Business Management Operations
Preserve and Maximize Current Funding and Identify Potential New Sources	Preserve and maximize current funding sources that are subject to competition from other properties. Develop a strategy to address the District's reliance on the sales tax. Ensure capital funding adequacy, for example, addressing the increasing role of counties in funding allocation decisions.	Budget and Business Management Administration External Affairs
Improve BART's Fare Policy	BART needs to develop more consistency and predictability in its process for setting fares; there is currently not an agreed timetable, process, or criteria for adjusting fares. BART has not investigated alternative models of pricing, such as time-of-day discounts, and BART does not have data from its own operations, which could inform discussions of alternative pricing models. If changes are made, fare policy can support achievement of the key results and outcomes sought by BART's communities and stakeholders, e.g., increasing the use of under-utilized capacity, improving customer satisfaction, etc.	Budget and Business Management External Affairs

*Language comes directly from Strategy Team work efforts

Ongoing Efforts

- ◆ System renovation
 - A/B cars
 - Advanced Automatic Train Control
 - Radio upgrade
 - Automatic Fare Collection
 - Elevator/escalator
- ◆ Station improvements
 - Intermodal access
 - Bike lockers
 - Transportation for Livable Communities grants
- ◆ Shop improvements

Status

Recognizing that rail systems are highly capital intensive, BART has had a comprehensive renovation and replacement program in place since 1995. To date, this \$1.57 billion program has succeeded in renovating 16 stations with four more under way, renovating 85 A/B cars, and replacing or overhauling ten elevators and 38 escalators.

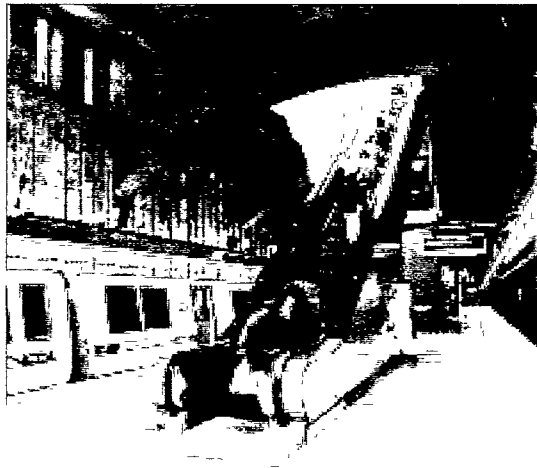
The shop improvement program is under way now, with work started on the Concord Shop first. The Hayward, Richmond and Daly City facilities will also be enhanced in the near future in this \$70 million program.

A \$15 million AC/BART Intermodal Transit Improvement program is under way at eight stations. At completion, interconnectivity among BART trains, AC Transit buses, Capitol Corridor Intercity Rail and Amtrak trains and Oakland Airport will be established or improved.

With these programs under way, the District can now look farther into the future. Establishing policies and programs with a 30-year horizon will enable us to carry more riders on more miles of track with confidence in our equipment and the funding program behind it.

Physical Infrastructure

New Initiatives



Maintaining our infrastructure and equipment in a condition that enables us to supply safe, reliable, high-quality, clean, and customer friendly transportation . . .

Cindy Church
Robin Cody
Rudy Crespo
Jim Dunn
Dale Fousel
Tim Krause
Mike Northrup

Al Scala
Fred Stephens
Jim Van Epps
Mike Lighty
Richard Wieczorek
Dave Warrick

Action Plan	Summary of Work Plan *	Responsible Organizations
Ensure Comprehensive Re-investment in the District's Physical Plant	Establish a steering committee to identify renovation and replacement cycles for BART equipment and facilities, and the dedicated resources necessary to accomplish those cycles on an ongoing basis, to maintain and operate the BART system safely and reliably. (Incorporate these needs into the District's baseline financial planning.) This steering committee can be comprised of staff from Maintenance and Engineering, Rolling Stock and Shops, TSD, Transportation, Budget and Business Management, and Procurement. The committee will provide feedback and consultation for the study activities related to the 30-year Asset Replacement study.	Budget and Business Management Operations Transit System Development
Ensure Effectiveness of Plant and Rolling Stock maintenance policies and practices	To better protect its infrastructure investments and ensure the effectiveness of plant and Rolling Stock maintenance policies and practices, BART needs to enhance processes for assessing its system maintenance practices and expenditures (i.e., "how do we know that our maintenance budget is getting the desired results?").	Operations
Maintain On-time Performance Through Increased Physical and Operational Flexibility	BART needs to ensure increased passenger capacity and enhanced service reliability and should establish a steering team to analyze this capacity. Identify means by which BART can continue to both accommodate ever-increasing patronage growth and improve system reliability. Incorporate these needs into BART's financial planning as resources permit, and as a basis for advocating increased future funding.	Budget & Business Management Operations Transit System Development
Improve the Effectiveness of Parts Procurement and Logistics; Ensure Adequate Infrastructure to Support Quality Service	BART needs to develop an overall strategy for procurement, replacement, inventory, and logistics. This strategy will re-examine how, why and when infrastructure maintenance, renovation and replacement programs are conducted in order to improve the effectiveness of parts procurement logistics and ensure adequate infrastructure to support quality service.	Budget & Business Management Operations Transit System Development Budget & Business Management

*Language comes directly from Strategy Team work efforts

Ongoing Efforts

- ◆ Employee safety programs
- ◆ Affirmative Action/Equal Employment Opportunity/diversity training
- ◆ BART LEADS/Monthly Managers' meetings
- ◆ Labor-management communication
 - President's meetings
 - Chief Steward's meetings
- ◆ Interdepartmental cooperation
 - Transit Systems Development partnership meetings
 - Town halls

Status

BART is committed to ensuring safe and supportive working conditions for more than 3,000 employees. In addition to workplace safety seminars, BART provides diversity training and sponsors employee development programs. Recent expansion and renovation of BART facilities included improved employee amenities, and annual allocations are made for replacing and upgrading equipment and tools.

Labor-management communications include quarterly working meetings of BART union leadership and the General Manager, and periodic "Labor Breakfasts."

Labor leadership and BART management have also committed to an era of partnership. A spirit of cooperation was established at a joint Labor/Management workshop late in the year, and participants came away with a new optimism about future relations.

The People of BART



New Initiatives

Action Plan	Summary of Work Plan*	Responsible Organizations
Improving Employee Involvement in Creating and Maintaining Partnerships	Create an educated and informed workforce at all levels of the organization that is able to communicate positively with the public, thereby supporting existing partnerships and creating new partnerships.	External Affairs
Improving Communications	BART is a large organization with diverse communication channels and needs. Often it is difficult for people who need to know what is going on in the organization to get into – and stay in – the communications loop. There is a perceived lack of time and technology to communicate effectively. This leads to problems with trust and responsibility due to inability to act and to meet and track commitments. BART needs to analyze effective methods of communicating details at BART both laterally and vertically and evaluate what has worked and what hasn't worked. The communications processes need to be looked at to see where the communications barriers exist and how to eliminate them. This information could be used as a basis for designing more effective communications programs that would equip BART employees with the knowledge they need to communicate effectively with other departments, other agencies and BART's riders.	Administration External Affairs Operations
Developing BART's Employees and the BART Organization	Through LEADS 2 and other leadership training that develops new skills and allows for daily application opportunities, BART can enhance its recruiting, respond effectively to the changing social, political and funding landscape, address expected automatic fare collection issues, and explore opportunities to provide more middle-management autonomy and authority. Grooming management from within can be achieved by facilitating broader, cross-departmental perspectives and enhancing skills such as listening, systems thinking, and facilitating.	Administration External Affairs

*Language comes directly from Strategy Team work efforts

Striving to be a professional,
caring organization
dedicated to meeting the
needs of our customers and
employees...

Terry Adelman	Ed Ladd
Mike Flanigan	Richard Leonard
Chris Flynn	John Mack
Barbara George	Bill McCoy
Wade Gomes	Mike Moran
Mike Healy	Terry Murphy
Al Johnson	D'arcy Porter
Wilson Johnson	

Ongoing Efforts

- ◆ Transit oriented development
 - Fruitvale Transit Village
 - 16th and 24th Street Stations
- ◆ Joint development
- ◆ Station Area Planning
- ◆ Station Area Working Group
- ◆ Station Area Database

Status

Cooperative planning is paying off for BART and the communities it serves. Station area improvement projects are under way or in final planning in San Francisco, Oakland and the East Bay communities. Most notable of these is the Fruitvale Transit Village, a federally-funded "livable communities" project which will transform the area around the BART Fruitvale Station in Oakland. In San Francisco, BART and the San Francisco County Transportation Authority received a Transportation for Livable Communities (TLC) grant to implement the first phase of the planned remodeling of the plaza at the 16th Street Mission Station. BART and the SFCTA also secured a TLC planning grant for the BART 24th Street Mission Station.

To facilitate these projects and others, BART has committed staff resources to station area planning, including establishing a station area work group and maintaining an extensive information database.

On the joint development front, BART has entered into exclusive negotiations with a private developer to assess the overall financial feasibility of a mixed-use development on BART property at the West Dublin/Pleasanton Station. We expect to undertake a \$100 million public/private development to include the transit station, residential, hotel and office uses in 2000.

These innovative efforts are new to transit properties and to BART. We recognize the risks involved, but are committed to participating with both public and private entities as we meet our transportation commitment.

Land Use And Quality of Life



New Initiatives

Action Plan	Summary of Work Plan*	Responsible Organizations
Integrate Station Area Operations and Projects	Formulate a comprehensive station area management strategy regarding internal station operations as well as the external relationship with the community. By establishing a cross-functional, Station Area Working Group, BART can devise strategies to minimize interoperator conflicts and create a comprehensive database for station area operations and activities. Such actions would enhance station area communications among a wide range of stakeholders and help to streamline operations and enhance community relations.	Budget and Business Management External Affairs
Develop a Portfolio of Successful Community-based Station Area Planning and Development Projects	Develop a portfolio of successful community-based station area planning and development. Formulate and articulate land use criteria for specific areas that embody BART's preferred station area land use concerns. The criteria should include a variety of land use and planning considerations (i.e., not be limited to density). In addition, capacity issues for BART and its multi-modal partners should be addressed to best understand its growth capabilities. BART's land use issues, objectives and strategies should be understood throughout the organization.	Administration Budget and Business Management
Participate in Regional Land Use/Transportation Planning	Participate in regional land use/transportation planning efforts that promote transit ridership and enhance quality of life.	Administration Budget and Business Management External Affairs

*Language comes directly from Strategy Team work efforts

Partnering 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 . . .

- | | |
|------------------|--------------|
| Peter Albert | John Rennels |
| Ann Branston | Beth Thomas |
| Kathleen Gilbert | Joe Torrisi |
| Harley Goldstrom | Jim Tousey |
| Desha Hill | Rube Warren |
| Jeff Ordway | Dick Wenzel |

Ongoing Efforts

- ◆ Marketing off-peak service
- ◆ System Expansion Policy
- ◆ System Capacity Study
- ◆ Capacity expansion
 - Advanced Automatic Train Control (AATC)
 - Automated Fare Collection (AFC)
 - Bikes on BART and bicycle facilities
 - Station cars
 - Intermodal facilities
- ◆ West Dublin/Pleasanton Station
- ◆ Oakland Airport Connector
- ◆ Warm Springs/San Jose Extension

Status

Ridership on the system increased substantially in 1999, up 6.9 percent over the prior year. Off-peak ridership, where BART can carry additional passengers at essentially zero marginal cost, has grown approximately nine percent over the year. Several marketing programs are in place to increase off-peak ridership further.

Intermodal access as embraced by the Board and effected by staff includes more permissive rules for bikes on BART, the station car program, enhanced feeder bus service, and the planned Oakland Airport Connector.

Staff is undertaking a strategic opportunities assessment, a review of where BART should allocate its resources to expand service to the Bay Area. As adopted by the Board in the System Expansion Policy, the assessment will guide our efforts to meet demand for transit services over the next 20 years.

The District must continue to identify new approaches to increase our ridership, with a particular concern for off-peak and reverse commute travelers, where we continue to have excess capacity.

Transit Travel Demand

New Initiatives



Maximizing ridership using the BART system's capacity to its fullest potential . . .

Action Plan	Summary of Work Plan*	Responsible Organizations
Establish a Service Innovation Group	A cross-departmental group would develop, guide and follow-up on innovative strategies to serve BART customers. Key tasks of the group would be to establish an ongoing process for identifying service innovations.	Budget and Business Management External Affairs Service Innovation Group
Establish Decision making and Evaluation Criteria and Guidelines	BART would develop and use a flexible set of criteria to make decisions on new service and capacity strategies.	Budget and Business Management Station Area Work Group
Develop a Market Analysis Database	BART would develop a database describing the factors potential BART riders consider most important in making transportation choices. This would provide the data for evaluating potential strategies against the criteria described above.	Budget and Business Management
Establish a Policy for BART to Encourage, Reimburse and Expand Participation in Trade and Professional Associations	BART can enhance its capacity to identify new strategies and approaches by encouraging staff participation in trade and professional associations.	Administration

*Language comes directly from Strategy Team work efforts

Dean Leonard David Rienke
Kathy Mayo Ruel Robbins
Dennis Mochon Dave Warwick
Gene Nishinaga Jim Wiscarson
Malcolm Quint

Ongoing Efforts

- ◆ Outreach programs
 - San Francisco Airport Extension
 - Office of Civil Rights
 - Strategic and Policy Planning
- ◆ Task forces/committees
 - Accessibility Task Force
 - Bicycle Advisory Task Force
- ◆ Government Relations
- ◆ Community Relations

Status

Partnerships with various local, state and federal agencies have made possible the BART San Francisco Airport Extension, the rehabilitation of BART's aging fleet of revenue service vehicles, and renovation of BART stations and facilities. Funding partners include the Federal Transit Administration, the California Transportation Commission and the Metropolitan Transportation Commission, and Alameda, Contra Costa and San Francisco counties. Future initiatives include and the seismic retrofit of BART facilities.

In the area of Strategic and Policy Planning, BART continues to advance partnerships with local government, including cities, counties, congestion management agencies and other transit operators, and with various constituent groups. BART has committed a significant staff effort to government and community relations, and has assisted in the creation of broad-based task forces to tackle issues such as station accessibility and access for bicyclists.

Building Partnerships for Support



Working together with other stakeholders to promote effective transit policies, initiatives and service delivery across the region...

Molly Burke	Phillis Pinkston
Cal Coleman	Michal Settles
Norma del Mercado	Betty Soo Hoo
Gary Gee	Gene Skoropowski
Rae James	Michael Tanner
Priya Mathur	Yolanda Vega
Marianne Payne	Julie Yim

New Initiatives

Action Plan	Summary of Work Plan*	Responsible Organizations
Building Relationships with Other Transit Operators and MTC to Resolve Issues of Regional Interest	Work toward a common vision for public and passenger needs and get coalitions and leadership needed to meet them. Being a regional transit resource, BART has the potential to develop a common vision with other agencies and serve as either lead or partner in regional initiatives. Currently interoperator cooperation tends to happen in a crisis but falls into disuse during funding negotiations and other "normal" times. BART needs to assess current and potential regional initiatives to determine BART's optimal role--either as lead, partner, or support. BART also needs to look at ways other operators and MTC can participate in BART initiatives (such as the Strategic Plan). Since the public sees public transit as a system and doesn't understand interoperator difficulties, if BART could improve interoperator cooperation and relationships this could have a marked impact on customer satisfaction. This cooperation could also improve communications and decrease unnecessary competition, which could improve BART's ability to gain funding support for jurisdictions that do not directly relate to BART services.	External Affairs Budget and Business Management Administration
Creating Successful Political and Funding Coalitions	Establish support relationships with key groups before the issues come up and develop BART supporters whether or not they use BART. BART needs to create more "ownership" of BART among elected officials, local jurisdictions, the environmental community and labor unions. Many of these (especially the environmental community and the labor unions) can be natural BART allies as they are in other cities and even in other parts of the Bay Area. With new leadership at the State and local levels and new people in management and on the Board of Bay Area transit agencies, there is an opportunity to create funding and project coalitions among elected officials, other agencies, labor unions and the environmental community. BART needs to assess its current position, especially with labor unions and the environmental community, building on strengths and eliminating weaknesses. Strategies and approaches for the BART Board and members of management need to be developed toward local jurisdictions, building on recent positive experiences with station area planning and airport extension planning. These improvements can increase funding stability and improve customer satisfaction.	External Affairs Budget and Business Management Administration

*Language comes directly from Strategy Team work efforts

Ongoing Efforts

- ◆ Accessibility for disabled passengers
- ◆ Regional initiatives
 - Trip Information/Planning
 - Marketing
 - Regional Transit Discount cards
 - Translink project
- ◆ Customer service research
 - Customer satisfaction survey
 - Station profile study
 - Passenger environment study
 - Complaint response tracking
- ◆ Focused service improvements
 - Anti-graffiti program
 - Restroom cleanliness effort
 - Digital signs showing estimated time of train arrival
 - Visible managers program
 - Customer service training
 - Tickets by web
 - Ticket refund booth

Status

While no formal survey was undertaken in 1999, two other key indicators of customer satisfaction suggest positive trends. Ridership for 1999 increased 6.9 percent over 1998, climbing to an average of 305,700 weekday trips, and reaching a record of 319,000 in November. While ridership increased, customer complaints only increased by 4.4 percent, a relative decline.

Focused efforts to improve services appear to be well received. In particular, ticket refund booths have sped up the refund process for failed tickets, and the anti-graffiti program has reduced the incidence of unsightly train interiors. Although not yet visible to our customers, District staff have been working with other transit agencies on the Translink program, which will allow a single fare instrument to be used on multiple systems, moving providers toward the goal of seamless regional service. BART staff is committed to improving the customer experience and to continued definition of new ways to achieve this vision.

The BART Customer Experience



Working with our transit partners to provide seamless, safe and reliable service to people throughout the San Francisco Bay Region . . .

Kevin Alexander Paul Oversier
Tamar Allen Susie Sanderson
Harley Goldstrom Sesh Seshadri
Ed Ladd Harold Taylor
Cristiana Lippert Richard Taylor
Robert Lockhart Carol Walb
Jim McHenry Kimberly White
Victoria Nerenberg

New Initiatives

Action Plan	Summary of Work Plan*	Responsible Organizations
Enhance Customer Service through Station Stewardship	Explore the feasibility of a new organizational model for station management and “stewardship” that is station-focused. Encourage a proactive approach to meeting customer needs. This effort should address opportunities throughout the BART organization. This issue is key to customer experience as customer surveys, press coverage, and employee feedback continue to suggest the need for enhancing the roles and responsibilities of front-line employees as they serve BART customers.	Operations External Affairs BART Police
Strengthen Internal and External Customer Perspectives in Capital Projects	BART should improve its processes for gauging rider and employee input to develop new and innovative services and amenities for customers. Customers, employees, and other stakeholders should have significant involvement in the development of capital projects. This will increase the effectiveness and success of investments in customer improvements by introducing first-hand perspectives on customer needs and the feasibility and appropriateness of potential solutions. BART currently conducts consumer outreach in some areas. This action plan would supplement and strengthen existing BART processes for gauging customer needs. This action plan also includes steps to develop new and innovative methods of obtaining internal and external customer input.	Budget and Business Management External Affairs Operations BART LEADS II Project Team

*Language comes directly from Strategy Team work efforts

1999 BART STRATEGIC PLAN REPORT

A NEW ERA OF PARTNERSHIP



1999 Strategic Plan Report

March 2000

BART Vision Statement:

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

BART Mission Statement:

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

1999 Strategic Planning Committee: Director Peter Snyder, Chairperson; Director Roy Nakadegawa; Director Tom Radulovich

1999 Board of Directors: Thomas Blalock; James Fang; Joel Keller; Willie B. Kennedy; Roy Nakadegawa; Tom Radulovich; Dan Richard; Peter Snyder; Carol Ward Allen

1999 Strategic Plan Report

I. Introduction

This report is the first annual Report on the Strategic Plan to be presented to the BART Board of Directors. The Report covers BART Board and staff activities that took place in 1999 related to the Strategic Plan adopted by the Board February 1999.

The strategic planning effort was initiated in 1996, with the Board directing staff to develop a plan to carry the agency into the next century. Dramatic increases in ridership, aging equipment and facilities, attrition of our first generation of staff, a shifting funding environment, new patterns of employment and land use in the Bay Area, and renewed calls for additional service are defining a new era for BART, and Board members felt a strategic plan could serve as a guide as the agency makes a series of complex decisions. Overall, the Strategic Plan is meant to assist BART in dealing with the key strategic issues facing us, in developing priorities for future service operations, and in addressing concerns shared by the communities we serve.

Staff reviewed agency procedures and policies, examined trends and projections, and evaluated industry information in creating the Strategic Plan. Board and staff members worked toward strategic decision-making, not just planning. We debated and defined goals, objectives and strategies for dealing with the challenges facing us.

The process was quite "hands on," with staff, including labor, and managers working with policy makers from BART and our partner agencies along with staff of other transit agencies, customers, and external stakeholders. Consultants did not define the Strategic Plan for us; it was an organic BART product.

The resulting plan focused on seven key areas:

- The BART Customer Experience
- Building Partnerships for Support
- Transit Travel Demand
- Land Use and Quality of Life
- People of BART
- Physical Infrastructure
- Financial Health

Moving the agency forward requires successfully balancing the concerns of these seven areas.

The theme of the BART Strategic Plan is A New Era of Partnership. This phrase symbolizes BART's willingness to reach out to the communities it serves and those it could serve, and to institutional partners in providing transit service. "BART communities" include, most importantly, customers and employees. Other communities include neighborhoods, cities and counties, schools, business sites, retail centers,

airports, intermodal stations, as well as communities of interest such as environmental groups, the disabled community, business and civic organizations. Institutional partners include funding agencies and other transit providers in the Bay Area. The themes of outreach and partnership permeated the teams' work, with many Action Plans resolving to move the agency toward greater connectivity in the region we serve.

II. Strategic Policy Development, 1999

The BART Board has taken an active role in implementation of the Strategic Plan. In early 1999, the Board initiated development of a series of policies related to the broad strategic plan concerns. The first policy definition effort, begun in the summer of 1999, was parking policy. Board and staff discussed policy options and staff developed a draft framework that proposes both District-wide and station-specific elements. Planning Department staff then began a process of outreach to partner transit and funding agencies, and other organizations. The framework and input from partners will be reviewed by the Board before a policy is adopted. A series of station-specific studies will then be undertaken to develop programs to implement the policies.

The Board also began the process of revising the District's extension policy. As a first step, the Board hosted a regional Land Use and Transportation Forum to explore significant opportunities to link future expansions with appropriate land uses, and seek stakeholder input on this new aspect of expansion policy. Subsequently, the Board adopted a System Expansion Policy, and a review of expansion opportunities both within and outside the District is now under way.

Pages five through seven summarize these policy development efforts. The process of Board/staff discussions, outreach to communities and partners, review and adoption of a policy, reflects the Strategic Plan commitment to a new era of partnership. We intend to use this process in defining other policies in the future.

III. Strategic Action Planning, 1999

In parallel with policy development work with the Board, staff began work on plan implementation. Working with a consultant familiar with facilitation of similar processes, staff organized Action Planning teams for each Strategic Plan focus area.

Each staff team was intended to be both interdisciplinary and interdepartmental. Expertise from different fields was sought for the various efforts, meaning that, for instance, the People of BART team had representatives from Transportation, Configuration Controls, Track & Structures, Office of Civil Rights, Hayward Shop, Safety, Police, External Affairs, Procurement, Human Resources, Employee Services, Line Management, Training, and Customer Services. Each department has a link to internal and/or external partnerships, and all were requested to participate in defining the People of BART Action Plans.

Vertical integration was as important as horizontal integration in structuring the teams. Each team had a sponsor from executive staff. All unions were invited specifically to participate, and all members sent were knowledgeable, involved team members.

The following outlines the general assignments undertaken at each team meeting.

Meeting No. 1	Discuss ongoing efforts
Meeting No. 2	Determine issues and priorities for further work
Meeting No. 3	Refine priorities and begin Action Plans
Meeting No. 4	Work on Action Plans
Meeting No. 5	Work on Action Plans
Meeting No. 6	Finalize Action Plans
Meeting No. 7	Finalize Action Plans (Financial Health team only)

A meeting of all team members was held on November 5, 1999. The purpose of this all-participant event was to share each team's effort with the other teams, to discuss the upcoming budget process, and to consider opportunities to hand off some Action Plans to another, more appropriate team. The meeting resulted from a team member proposal, and was generally considered a success.

The strategy teams began their work by naming and discussing the efforts BART has under way in each focus area. The exercise served to remind the participants that the strategic planning effort in general is expanding the boundaries of BART's already ongoing efforts. It is clear that District resources are already committed to meeting the vision statements of each of the areas, and that the teams would each be working to define what *additional* effort could be committed to move the agency forward. With BART already actively working to achieve strategic goals, the team members committed first to maintaining the organization's progress, and secondly, to improving our efforts to meet goals.

After reviewing the ongoing efforts in its field of concern, each team worked with its facilitator to define the priorities that would guide its own work. This was the step where the abstraction of the vision statement, the mission statement, the goals and the strategies defined in the 1998 effort of writing the Strategic Plan began to be crystallized into a few finite Action Plans.

The teams' work products are the linkage to the ongoing efforts. By outlining the responsibilities, timeframe, and resources, the Action Plans provide the information needed to follow up on the teams' work.

A critical element of each Action Plan is identification of the lead responsible person associated with each task. Although most tasks have support departments and individuals identified, the sponsor takes responsibility for moving the task forward, including shepherding it through the budget process if necessary.

Pages nine through 15 outline the work of each strategy team. Each page shows the vision statement that guided the group's efforts, and the team members. Ongoing Efforts summarizes the work BART is currently putting toward meeting the vision statement, as recognized and discussed by the team. This is the foundation upon which the Action Plans are built. The central panel outlines the Action Plans the team devised. Name of the plan, content, and responsible departments/organizations are shown.

IV. Budget Links

The teams' Action Plans are being implemented in various ways. Many plans, or tasks, can be implemented with existing resources, and some of these are underway now. Some implementation is founded on informal information exchanges across departments, and these are now ongoing.

Some require funding before implementation can begin. Each Action Plan that requires additional resources was linked to the budget and will be considered for funding through the annual budget process now under way. Given budget realities, not all Action Plans will be funded; certainly, not all will be funded this year. Action Plans that are not funded can be reviewed by the strategy teams of 2001 for inclusion in a proposal for that year.

V. Next Steps

The District's strategic planning will follow a two-year cycle, with a report prepared for the Board every year. The Strategic Plan will be updated every two years. In alternate years, such as 1999, staff will undertake action planning. Plan implementation will be an ongoing effort.

Policy Development



◆ Parking Policy

◆ System Expansion
Policy



Parking Policy



Goals

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

Framework*

◆ System-wide Parking Management

Update parking management strategies. Examples include preserving spaces for daily commuters (time limits and prohibiting community use), providing real-time parking occupancy information, efficiently allocating parking to special uses, etc.

◆ Community Partnerships

Undertake parking improvements in partnership with local communities. 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.

Consider parking charges at capacity-constrained stations to offset the cost of improvements

Add or reduce parking to achieve higher ridership in the context of overall station area development

◆ New Parking Choices

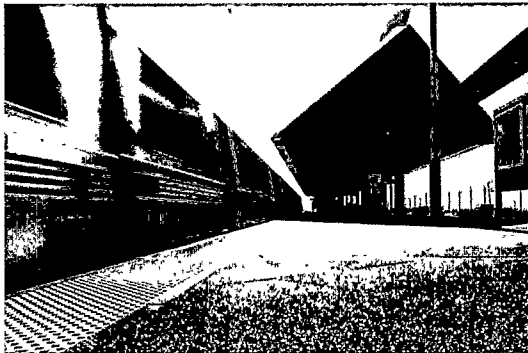
Offer riders new parking choices. Riders choose between free parking and new services pursuant to their willingness to pay. Examples of new choices include long-term airport parking, Quick Park program, reserved parking, auto services, etc.

◆ New Parking Facilities

For new parking facilities (new extensions, new stations and additions to existing stations), establish a parking charge policy. Pursue grants and private/public partnership to help offset costs.

*Framework developed by Board staff and currently being discussed in a series of outreach meetings with partner agencies and public groups.

System Expansion Policy



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

Framework*

◆ Partnership

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

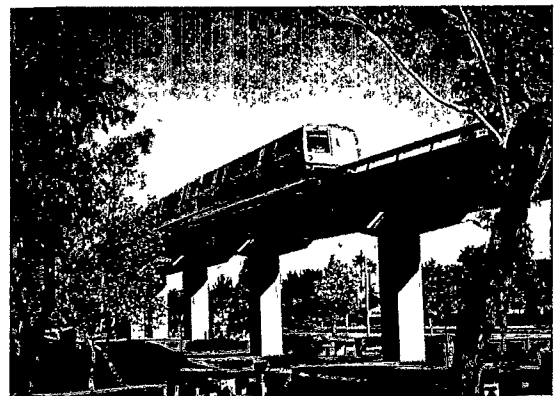
◆ Transit Service Options

Explore new BART and other transit service options (i.e., commuter rail, light rail, quality bus) where appropriate and possibly as interim service.

◆ Criteria for Project Advancement

For all new expansion projects (new extensions, new in-fill stations) develop criteria that will assure that projects are:

- Cost effective, i.e., minimize the need for operating subsidies
- Integrated with other services and facilities in an intermodal regional network
- Maximize ridership by supporting smart, efficient and desirable growth patterns
- Can be accommodated without adversely affecting existing system capacity, quality, and financial health
- Have adequate bus, bicycle and pedestrian feeder service



* Adopted by the BART Board of Directors in December 1999.

Action Planning



- ◆ The BART Customer Experience
- ◆ Building Partnerships for Support
- ◆ Transit Travel Demand
- ◆ Land Use and Quality of Life
- ◆ Physical Infrastructure
- ◆ Financial Health
- ◆ The People of BART

