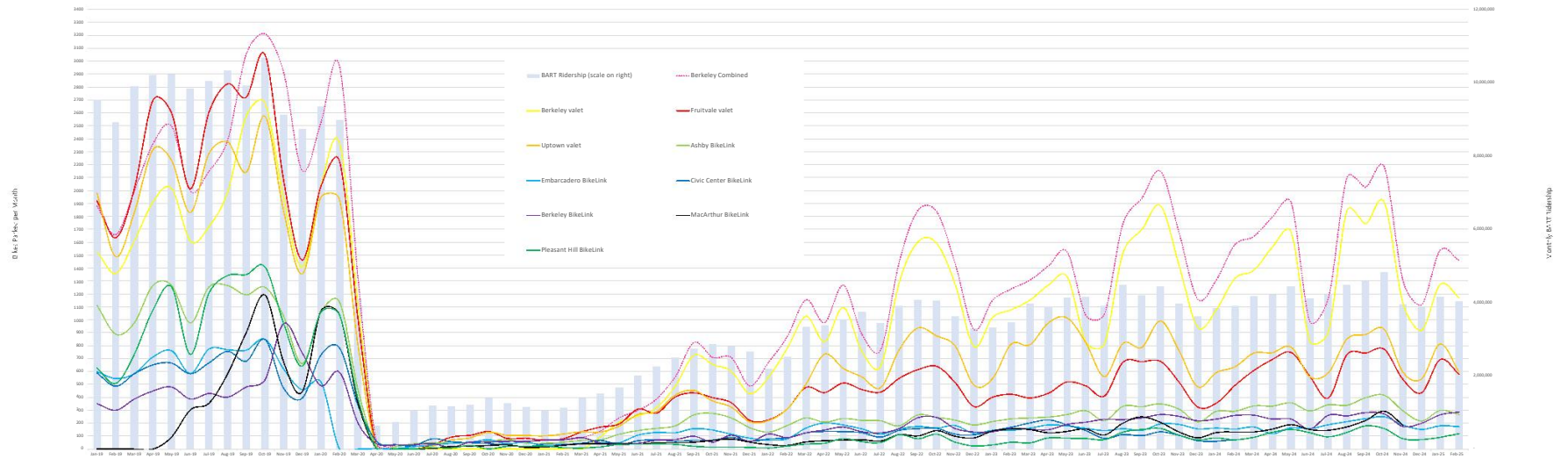


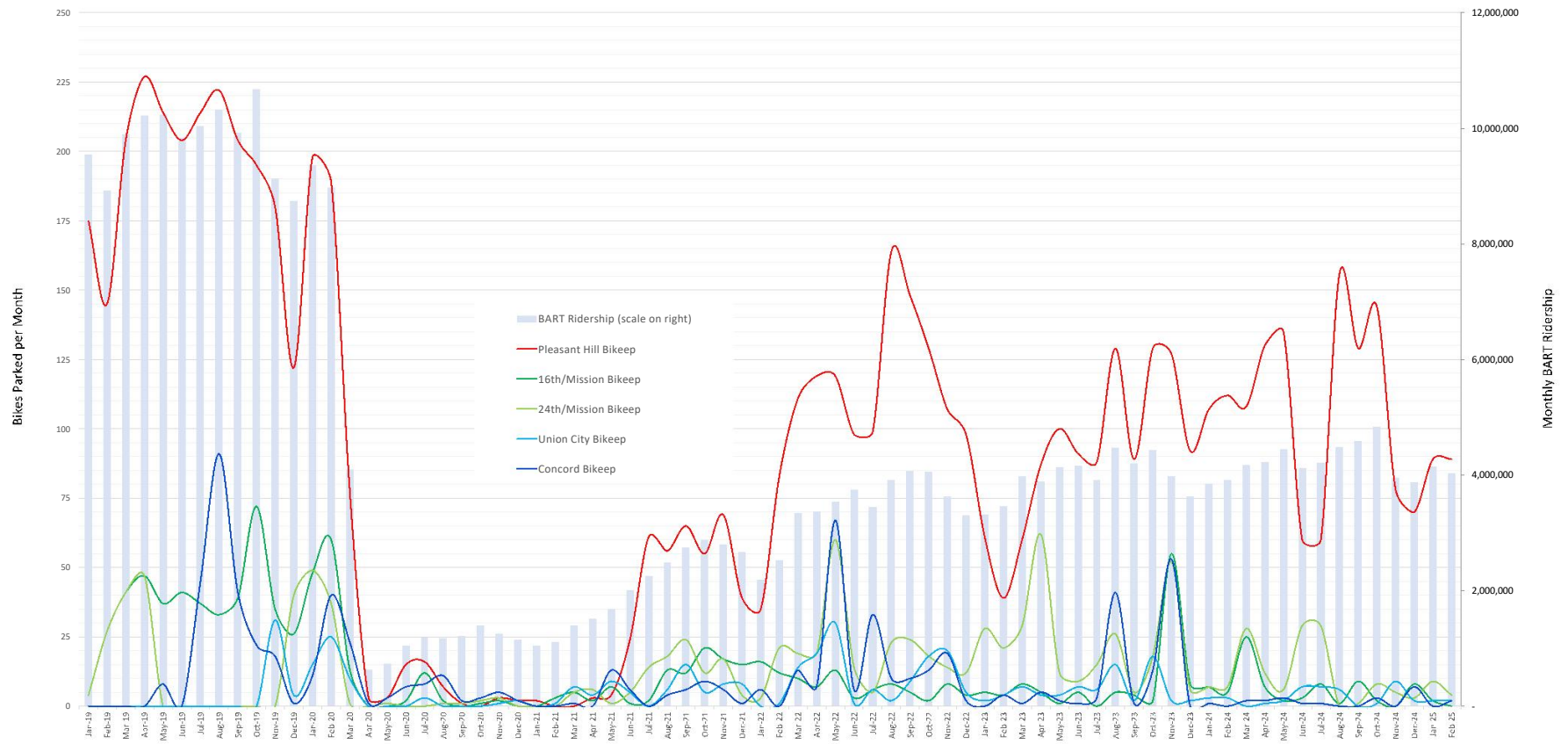


### Monthly Volumes at BART Bike Stations & BART Ridership Jan 2019-Feb 2025



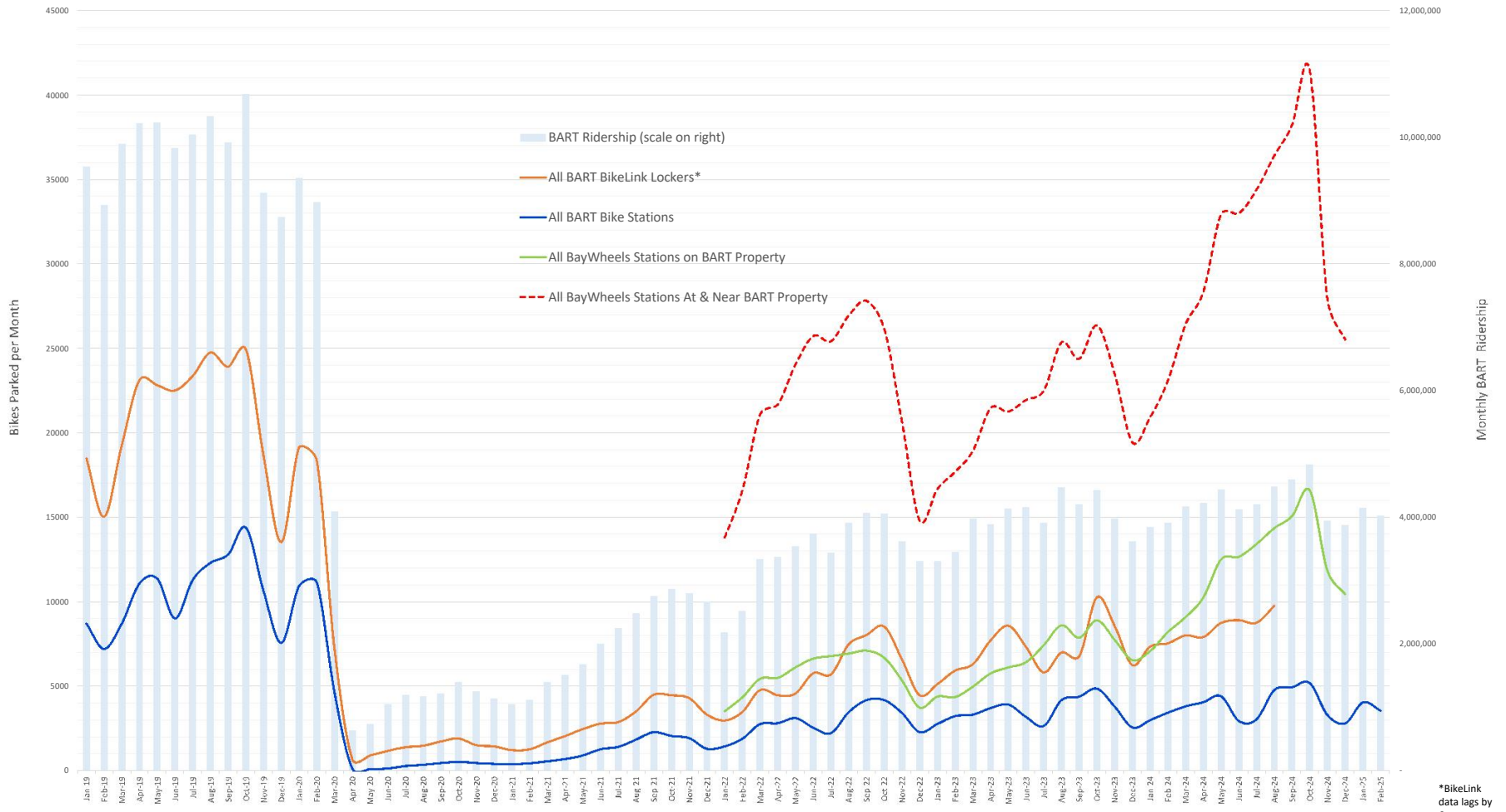


### Monthly Volumes at BART Bikekeep Smart Racks & BART Ridership Jan 2019-Feb 2025





### Monthly BikeLink Lockers, BART Bike Stations, Bike Sharing and BART Ridership Jan 2019-Feb 2025



\*BikeLink data lags by 6 mos.



# SAN FRANCISCO BAY AREA RAPID TRANSIT DISTRICT

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## MEMORANDUM

**TO:** Board of Directors

**DATE:** March 13, 2025

**FROM:** General Manager

**SUBJECT:** BART Board 2025 Workshop - Summary

The annual 2025 BART Board Workshop was held on February 27 at BART Headquarters. This event was an opportunity for more in-depth conversation among Board members, and between the Board and staff on the most important topics for the new year. Below is a summary from the Workshop discussions.

### **Facing the Fiscal Cliff**

- Regional measure:
  - BART needs to continue close collaboration with regional stakeholders on the development of the measure and regularly report back to the Board.
  - Support expressed for 1A or Variable Rate options put forth by MTC, with note that the variable rate increases funding to Muni.
  - The measure needs effective messaging that balances the need to transform the regional transit system and prevent service reductions. The measure language needs to be simple and straightforward for voters.
  - A citizens' initiative could pass with a simple majority across counties, but such a campaign and effort would need to be led by a group independent from a public agency and there could be challenges such as gathering signatures and funding that effort.
  - Further polling is needed to understand nuanced issues on the county and subcounty-level and among riders versus non-riders.
  - Some directors expressed concern that the regional measure options being evaluated would not diversify BART's funding sources since it would increase reliance on sales tax, which is subject to economic conditions. However, it was acknowledged that measure viability with voters is critical.
- Funding sources and cost reduction:
  - BART has explored revenue sources, such as parking, real estate, advertising, and telecom, but these provide only marginal revenue. Conversely, the regional measure is a public investment that can provide sustainable funding that addresses BART's structural deficits.
  - Look to see what more BART can do to cut costs – keep all options on the table and see if we can make deeper cuts without impacting service.
  - Service cuts, even at 90% below current BART service levels, would only address part of the deficit. Request for staff to evaluate the service level that could be delivered with a \$350 million cost reduction, including the potential loss of ridership.

- Some directors do not support land sales as a revenue generating option because the land should be used to help address housing needs and due to the difficulty in reacquiring property.
- Given the BART Board's recent approval of labor contract extensions (Summer / Fall 2024), there is no proposal to change workforce rules, however BART is actively evaluating other strategic cost reduction options that would not impact service or customer experience.
- While the regional measure is a priority, BART should also look to other sustainable funding sources and to diversify funding base – for example, federal and state funding, and creating a development agency to capture rents and leases.

**Improving the Customer Experience:**

- Overall, Directors were pleased with the improvements to the customer experience, expressed thanks for the work staff is doing, particularly front-line workers, and supported ongoing/further improvement of the customer experience.
- BART needs to continue to address safety via hiring critical positions and continuing to implement the progressive policing program. Potential areas of new emphasis:
  - Improve safety via expanding the Not One More Girl campaign and completing the gender audit recommended by the Alliance for Girls.
  - Consider SEPTA's Hub of Hope program model that offers an outreach engagement center on transit property in collaboration with county public health agencies to address unsheltered populations.
  - Implement a rider etiquette campaign.
  - Ensure that senior and younger riders feel safe, are aware of how to use BART and the BART App and are aware of discounts.
  - Offer safety escorts for riders between station and personal vehicle and promote this as an option.
  - Interest in understanding more detail on uniformed deployment and if coverage can be expanded (i.e., to bus waiting areas and/or to increase off-peak presence); noting that current deployment focused on when/where calls are received.
  - Excitement for implementation of WiFi at stations and along the track which will allow BART Police Dispatchers to view live train car video.
- Directors appreciated station and train cleaning efforts and would like to see an expansion of scrub crews. Additional focus areas include power washing of station exterior and applying agents to prevent the oxidation of train exterior to maintain a clean appearance.
- Improve station conditions, particularly in high-visibility areas like the street level plazas at the Mission District stations, through capital improvements and partnerships with cities and police. Also, consider quick quality of life fixes for scratched up elevator glass panels and restroom door replacements.
- Consider activating stations and trains with retail, food, art, cultural festivals, and other community-driven initiatives to make them more welcoming and reflect local culture.
- Directors were enthusiastic about fare programs and passes, including expanding the BayPass program, offering daily and monthly fare products, and exploring these ideas now to be ready for implementation of Clipper 2 technology. There is a desire to market new fare programs and discounts before they launch.

- Consider making all content on the BART App more accessible in multiple languages and making information on elevator/escalator/restroom outages easier to find on the App. Translate the bart.gov/report page.
- Consider how to modify the in-train display to show time and which side of the train the next stop will exit.

### **Public Communication, Education and Engagement Plan**

- Directors emphasized the importance of messaging BART's regional impact and how it benefits both riders and non-riders, focusing on uplifting messaging about community and connectivity, and leading with BART's values.
- Important for the Board to get in front of the community and local organizations (e.g., Chamber of Commerce) and message the improvements BART has made to build public trust and grow ridership.
- Center fiscal responsibility in the messaging – cost effectiveness, cost savings, and being good stewards of public dollars.
- Consider expanding partnerships with local businesses and organizations and offer rider discounts for those who shop at local businesses.
- Continue to create successful messages via social media and engaging content such as “how to ride” videos for non-regular riders.
- Critical to have consistent messaging across leadership and board members.

### **Capital Program Overview**

- Directors expressed support for the lighting program, which is a priority and has a high return on investments with reduced maintenance and energy costs.
- Directors expressed support for platform screen doors to enhance safety and address growing concerns about intrusions.
- There is an emphasis on integrating art and culture into infrastructure to enhance community vibrancy.
- Directors expressed concerns about rising construction costs and the need to stay ahead of inflation in forecasts. There is an interest in understanding how BART can continue to improve efficiency and cost effectiveness through contracting strategies and bringing work in house.
- The importance of predictive and preventative maintenance includes using AI and data analysis to improve reliability. Consider if AI could be used with the camera generated information to improve BART uniformed staff deployment.
- Directors expressed general support for investing in State of Good Repair capital projects to improve customer experience before investing in expansion.
- Regular shutdowns and efficient asset management are also highlighted as essential for system upkeep; consider how to further educate the public on the importance of these shutdowns and market them in advance (similar to Muni's Fix It Week).

### **Priorities and Actions for 2025**

- **On Right Track-** Board members expressed general alignment with staff on improving the customer experience and focusing on addressing the fiscal cliff and a successful funding measure by building support, seeking other sources, and managing costs.
- Additional areas highlighted in the discussion:
  - **Sustainable Funding and Cost Reductions:**
    - Continue to identify how to grow ridership.

- Continue to look at strategic cost reductions that do not impact customer experience.
  - Seek to diversify funding base with sustainable long-term sources in addition to the regional measure, such as state funding opportunities.
  - Explore the creation of real estate loan funds to capitalize different fund sources and a development authority to use the funds to deliver housing and other development projects to capture rents and leases directly.
- **Regional Measure:** continue to collaborate with regional stakeholders in measure development to ensure clear language that delivers positive messaging to voters. Aim to support SB 63 when substantive amendments are available.
- **Customer Experience Focus: Safety, Reliability and Cleanliness.**
  - Continue to prioritize on-time performance, reliability and cleanliness.
  - Build on existing safety initiatives through key hiring and progressive policing, and increase ambassador staffing.
  - Emphasize safety for women, seniors, and youth, and highly visible station areas such as plazas (e.g., suggestion to develop a capital improvement plan for Mission Street plazas).
  - Implement quick quality of life fixes (e.g., elevator glass panels, restroom door replacements).
  - Explore implementation of platform doors to increase safety and reliability.
- **Activation and Placemaking.** Activate stations and trains with retail, food, art and pop-up cultural events to improve rider experience and reflect local culture. Activate trains with wifi and infotainment.
- **Fare Programs:** expand BayPass and explore new fare products and passes for implementation once Clipper 2 technology is ready.
- **Board Member's focused actions for 2025** around communication, outreach and engagement with the community and key stakeholders (both riders and non-riders):
  - Engage with stakeholders, cities represented, and partners to build support for BART – sharing what we are doing and re-establishing public trust. Message should include themes of joy and pride.
  - Establish partnerships to help activations and build ridership, including community outreach to schools and exploring a buddy program for seniors learning to ride BART.
  - Request support from Government & Community Relations to provide lists of organizations to engage with in San Francisco.

If you wish to provide feedback on the 2025 Board Workshop, please enter them in this form: <https://tinyurl.com/2025BARTWorkshop>. If you have any other questions, please contact me at (510) 464-6060.




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Robert M. Powers

cc: Board Appointed Officers  
Deputy General Manager  
Executive Staff





# Improving the Customer Experience

Board Workshop

February 27, 2025



# BART Continues to Evolve

- The BART brand has evolved over the years responding to economic and cultural shifts
- We spent decades expanding the system
- Overcrowding, aging infrastructure, work stoppages, high-profile policing and crime incidents, and the homeless and drug crisis shaped the narrative and context of the past 15 years and our response plans
- In 2020, we had to scale back service in response to stay-at-home orders, then rapidly scale up service
- The pandemic forced us to double down on basic rider improvements and try new things

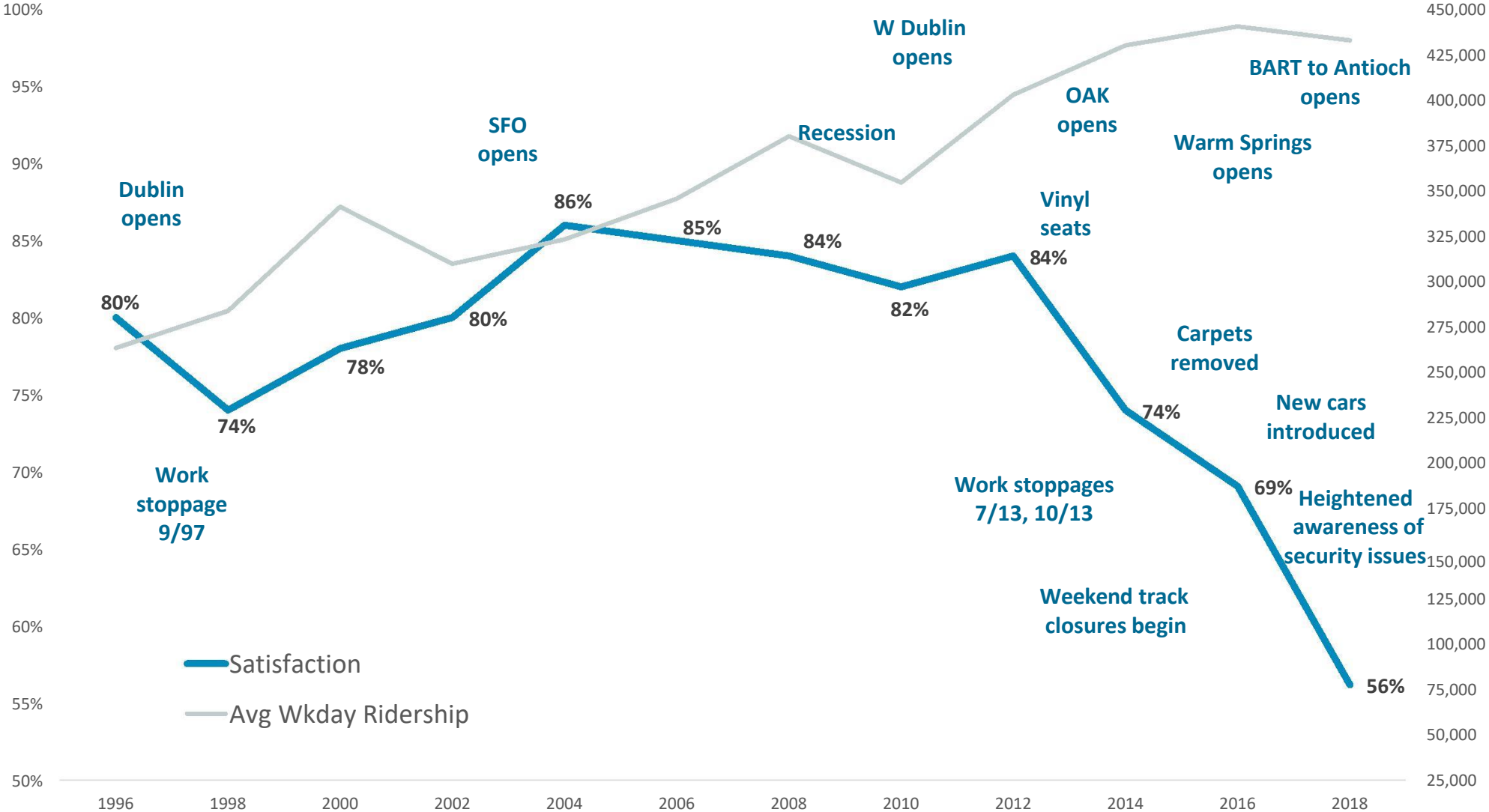


**2018** overcrowded conditions, aging fleet



**2025** new escalators, bright lights,  
bikes allowed on escalators

# Satisfaction Trends and Ridership: 1996 – 2018



# Progress and Accountability

- We've made strategic decisions and identified target areas based on rider surveys and feedback from the public
- These decisions have set industry standards across the country:
  - Measure RR investments
  - Progressive policing
  - New fleet of train cars
  - Focus on quality-of-life initiatives
  - Reopened restrooms
  - Reimagined service plan with clock-face schedules
  - Reducing fare evasion and providing discounts
  - Addressing harassment
  - Labor peace and partnership

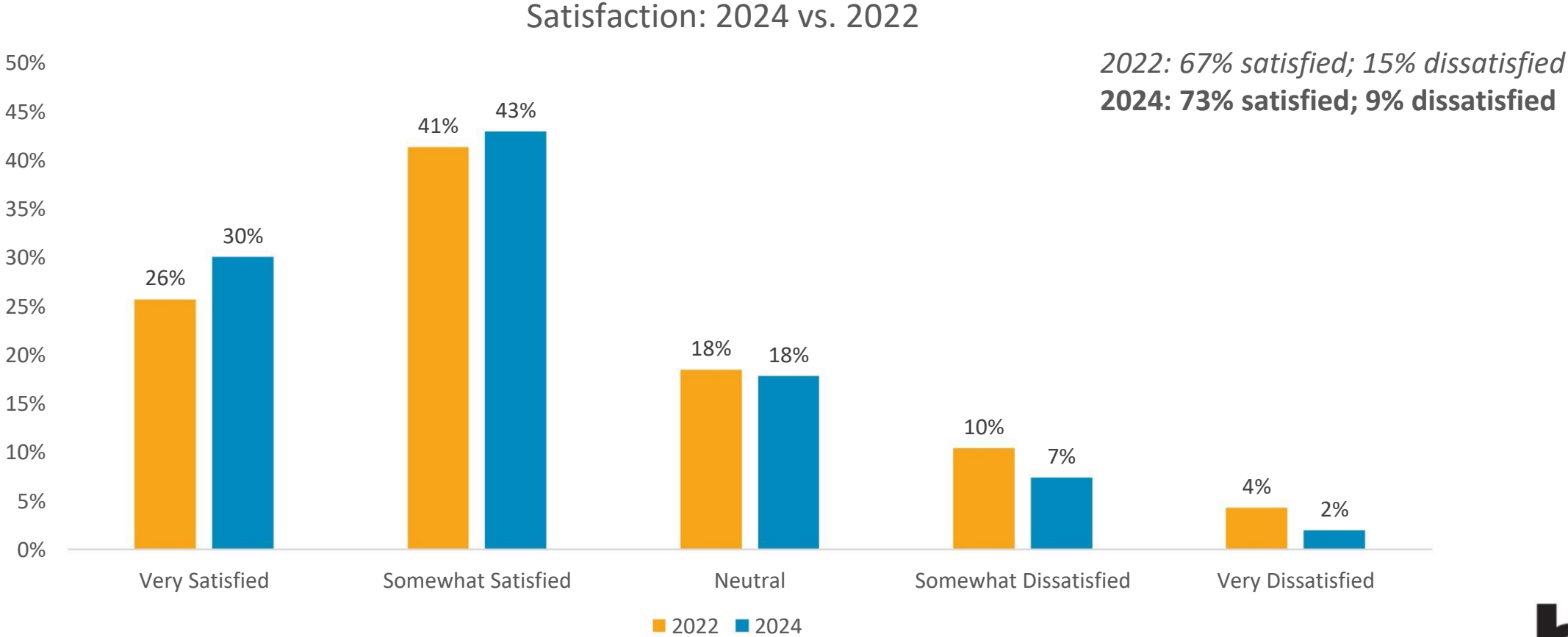


# Measuring Customer Satisfaction



# Satisfaction

- 73% are very or somewhat satisfied with BART, up six percentage points from 2022



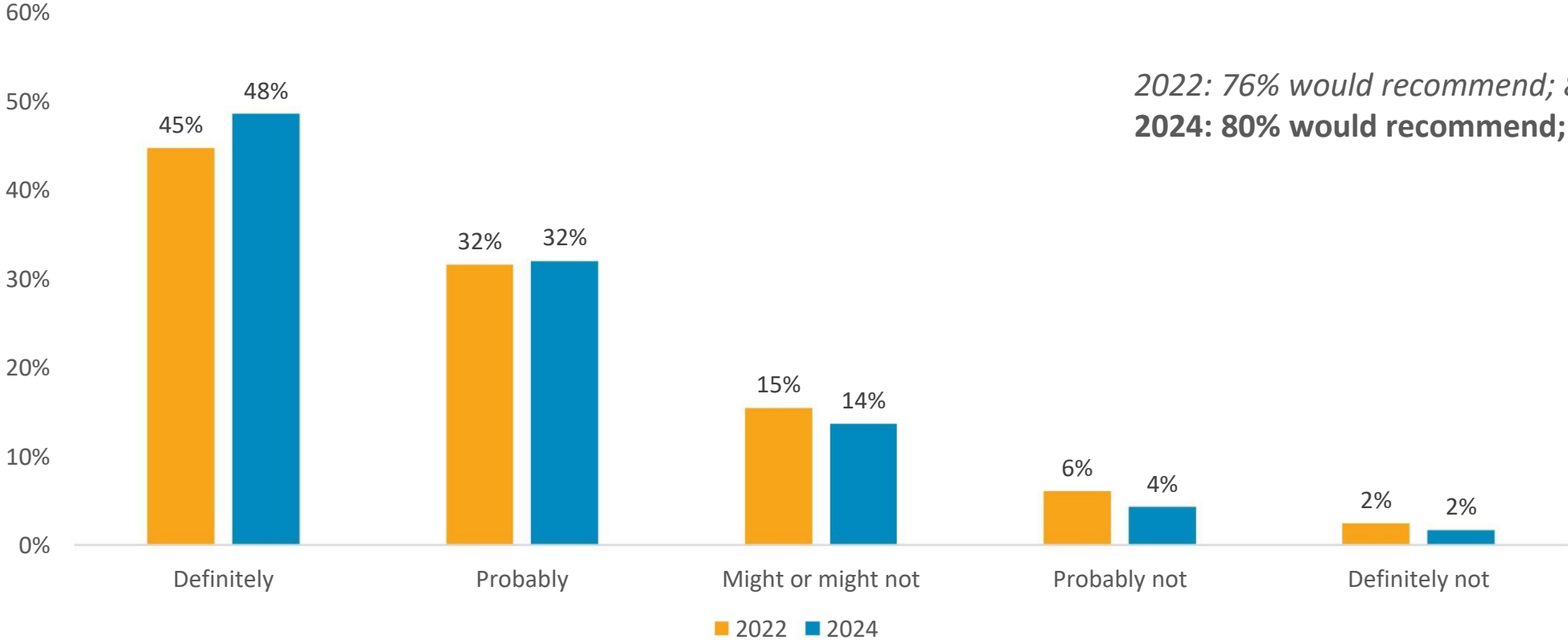
Note that the 2022 “bottom two box” score of 15% is impacted by rounding.



# Recommend to a Friend

- 80% would recommend BART to a friend of out-of-town guest, up four percentage points from 2022

Recommend to a Friend: 2024 vs. 2022



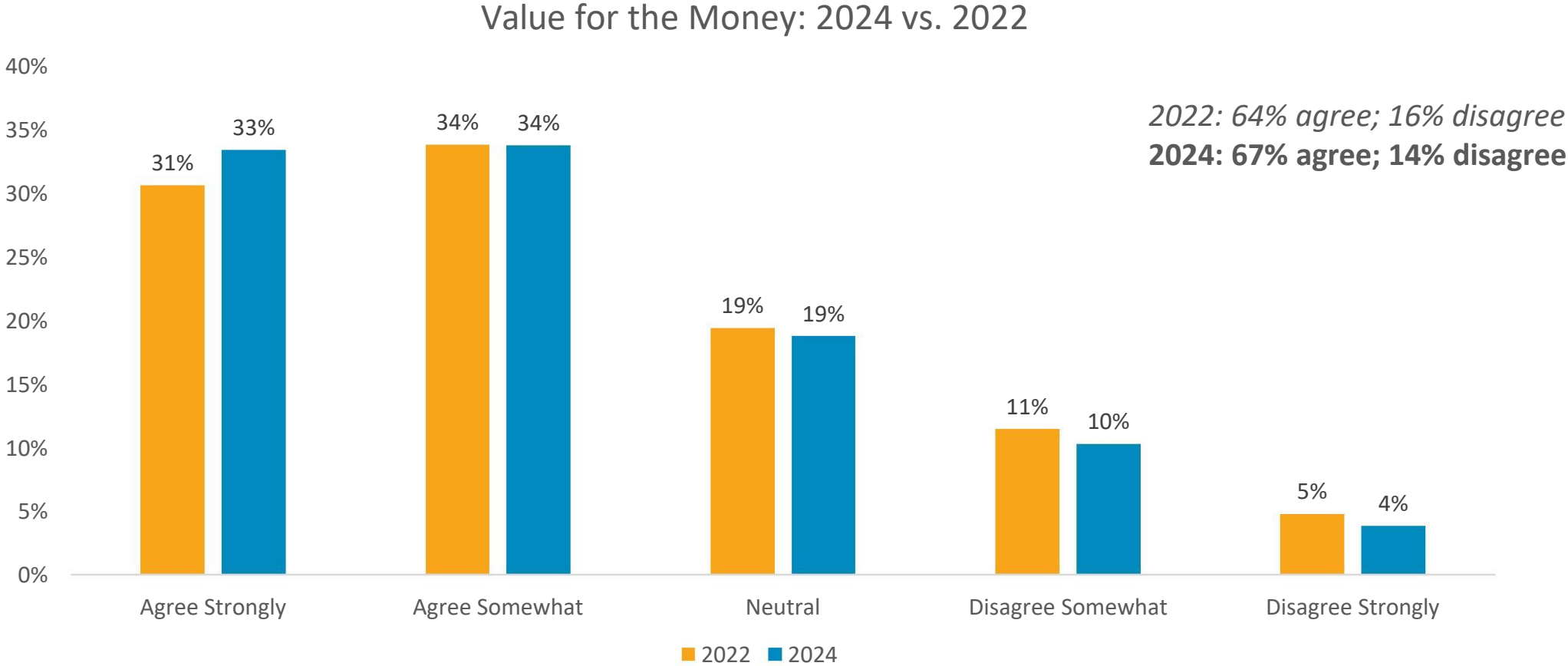
2022: 76% would recommend; 8% would not  
2024: 80% would recommend; 6% would not

Note that the 2022 “top two box” score of 76% is impacted by rounding.



# Value for the Money

- 67% agree that BART is a good value for the money, up three percentage points from 2022

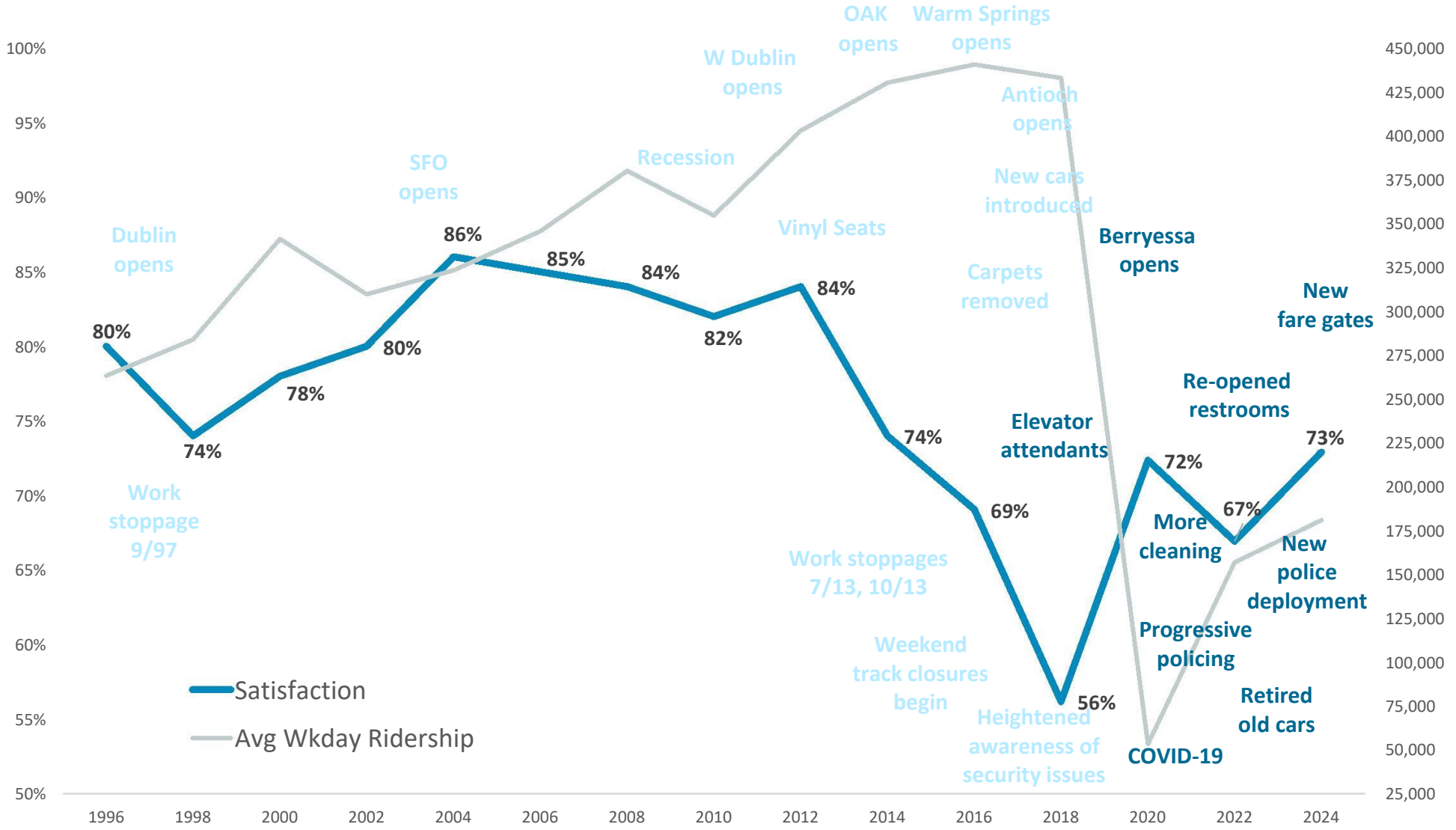


Note that the 2022 “top two box” score of 64% is impacted by rounding.



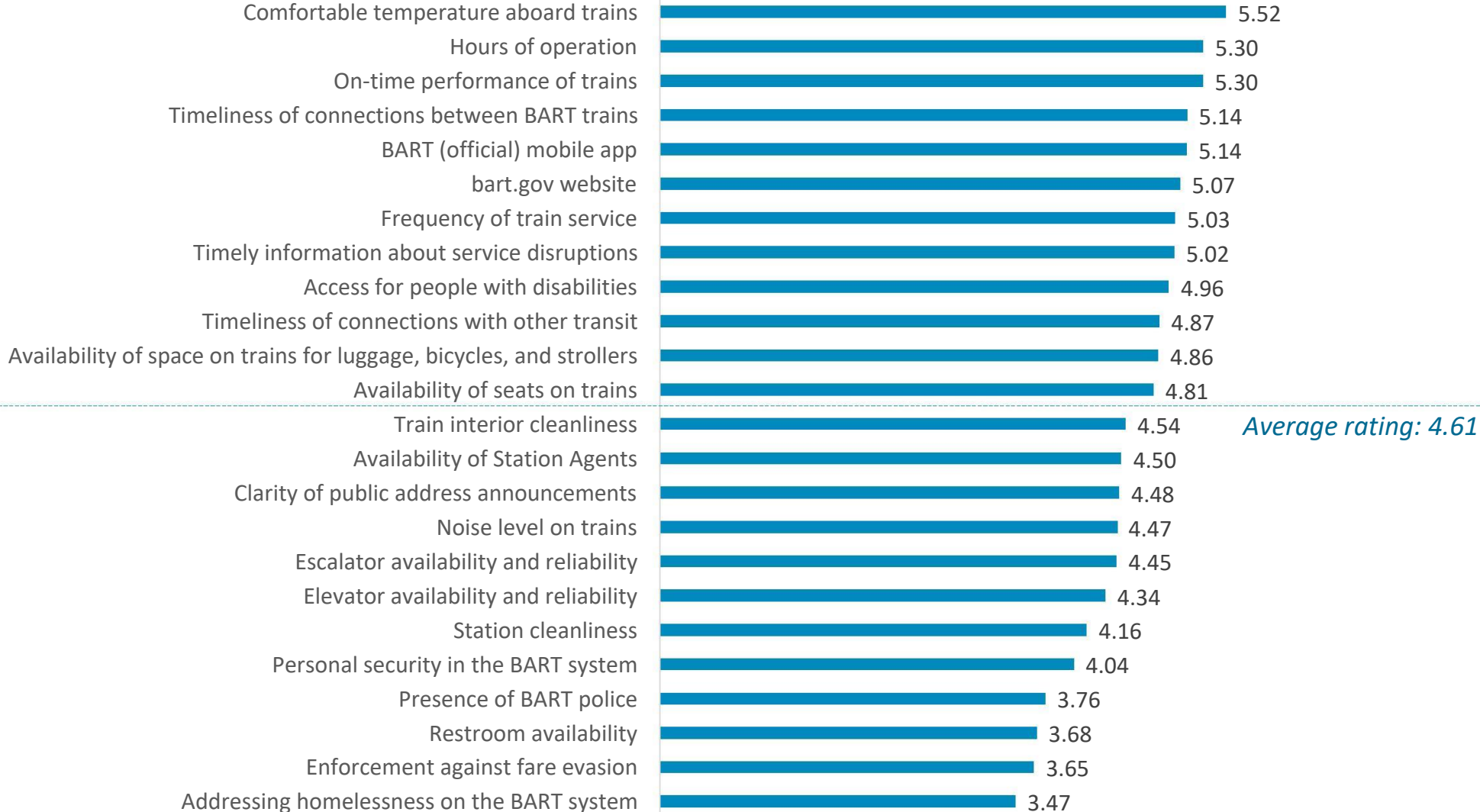


# Satisfaction Trends and Ridership: 1996 - 2024



# Service Attribute Ratings

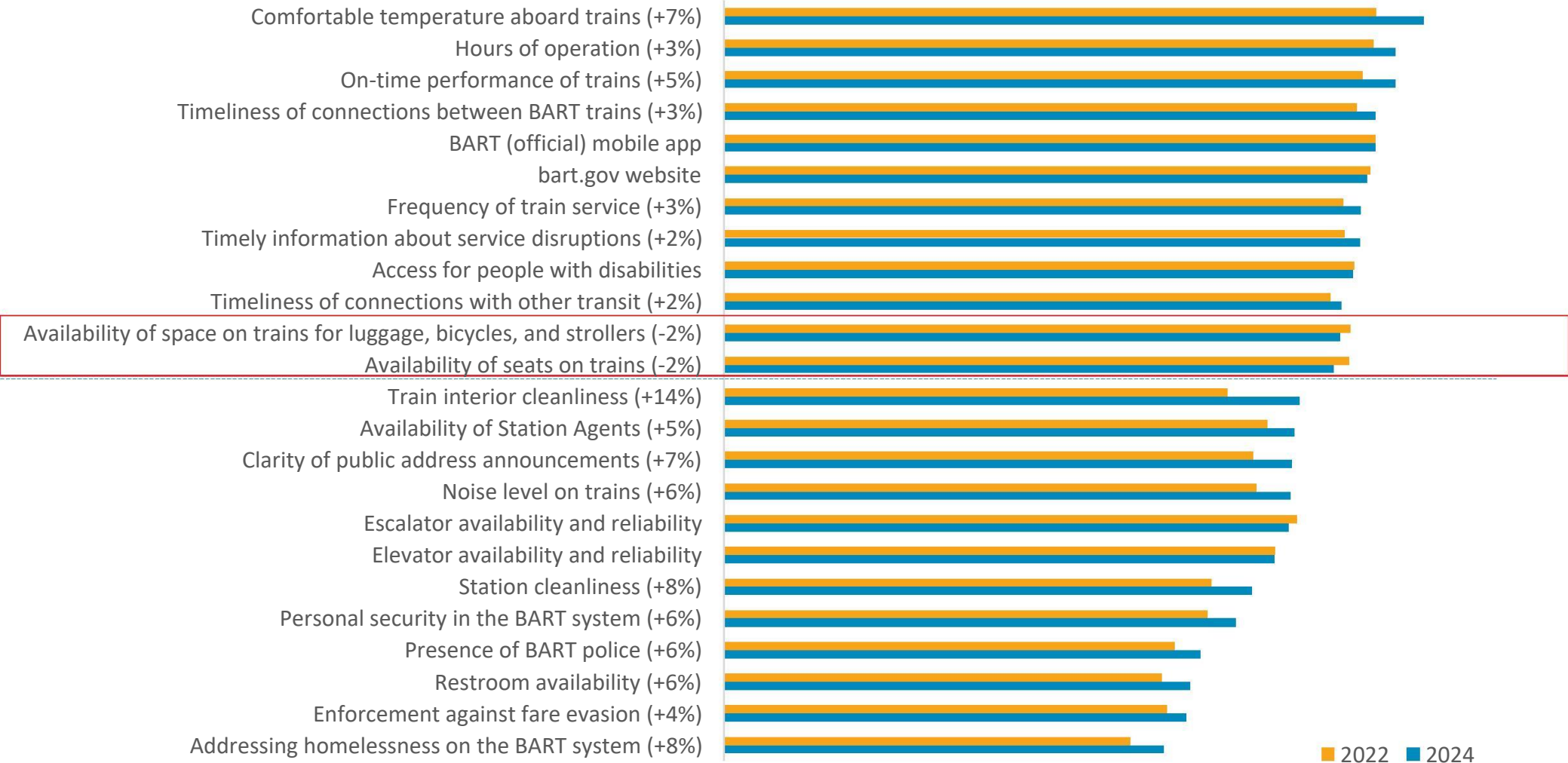
Please help BART improve service by rating each of the following attributes. "7" (excellent) is the highest rating, and "1" (poor) is the lowest rating.



# Service Attribute Ratings

- Ratings of most attributes increased vs. 2022. Only two decreased.

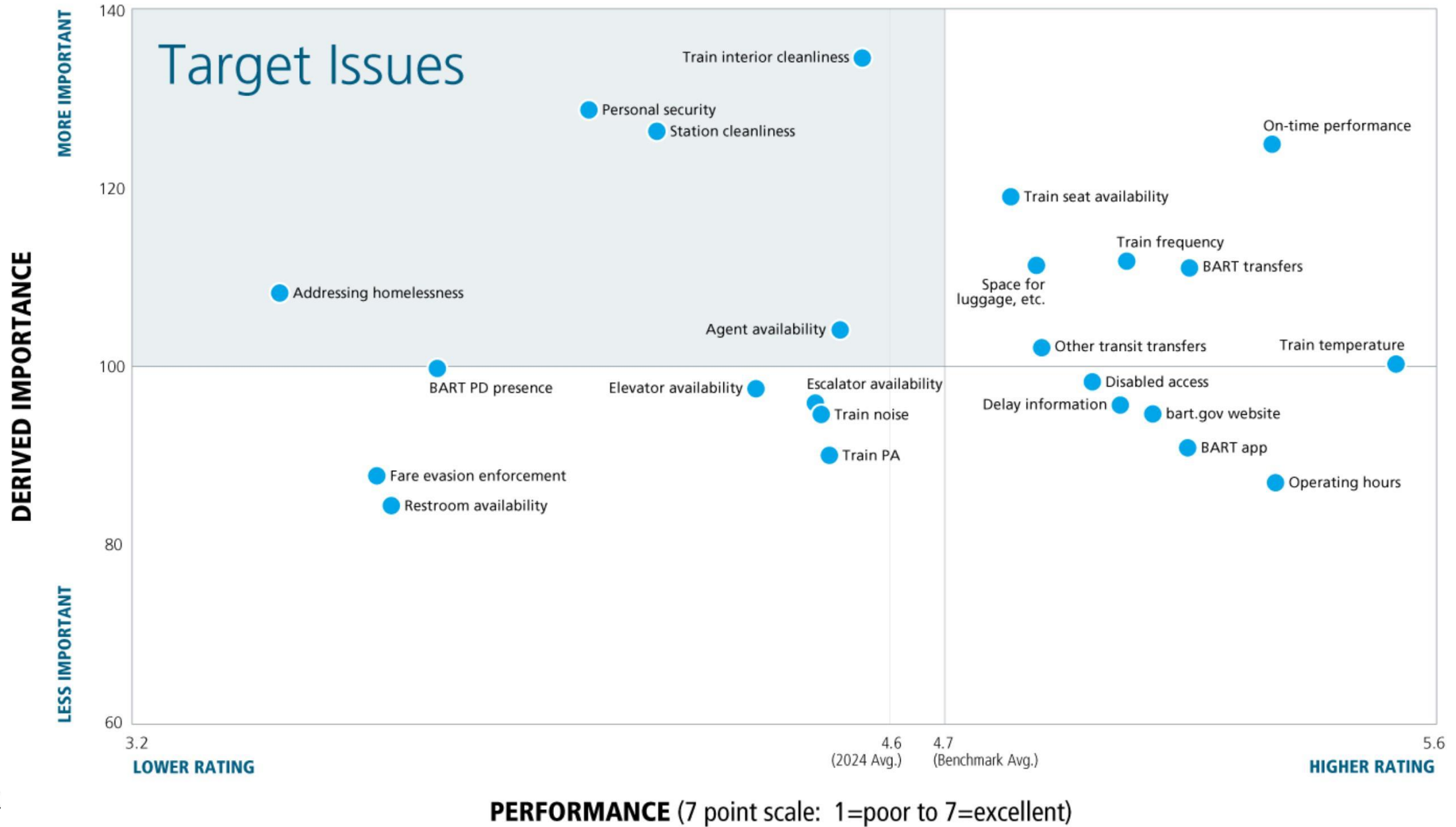
Please help BART improve service by rating each of the following attributes. "7" (excellent) is the highest rating, and "1" (poor) is the lowest rating.



Note: attributes that do not include changes in parentheses are statistically unchanged vs. 2022 (at the 95% confidence level).



# 2024 Quadrant Chart



# Verbatim Comments

*I love the new trains and feel it's much cleaner.*

*I know you guys are trying hard. I wish you luck. I'm hoping you guys still exist. Society's problems are killing you.*

*It's not as bad as it used to be, 2 or 3 years ago, it was a zoo on the train - not safe.*

*I wish I could take BART more, specifically at night. Safety is my biggest concern on BART. Especially at night.*

*Homelessness, aggressive panhandling & filth in the trains and stations have turned me to driving as often as I can for the first time in 20 years. I will no longer take BART outside of commuter times, given the clear personal risk of being alone in a car.*

*Fare evasion has improved due to the gates...from what I've seen, fare evaders are the ones who cause the most disruption (bad smell, loud sounds, loitering the trains)*

*We need more trains or train cars during busy hours! It's so uncomfortable being squeezed in a train when only 6 cars are attached. When we know you all can do up to 10. Lots of positives though. Response time for a disruptive passenger from BART police is good! Very very happy about the new fare gates!*

*...You have issues when it rains, when it's too windy, when it's too hot, when it's too cold, or when someone sneezes too hard in a train. This is the biggest reason why I can't recommend BART and tell people to take a Lyft or Uber if they need to be somewhere on time.*

*I thank you guys for getting me everywhere. I can't afford a car, and I'm an older sister taking care of her younger siblings, and BART and Muni are the best. Thank you guys so much!*

# Improving the Customer Experience: Priorities for 2025



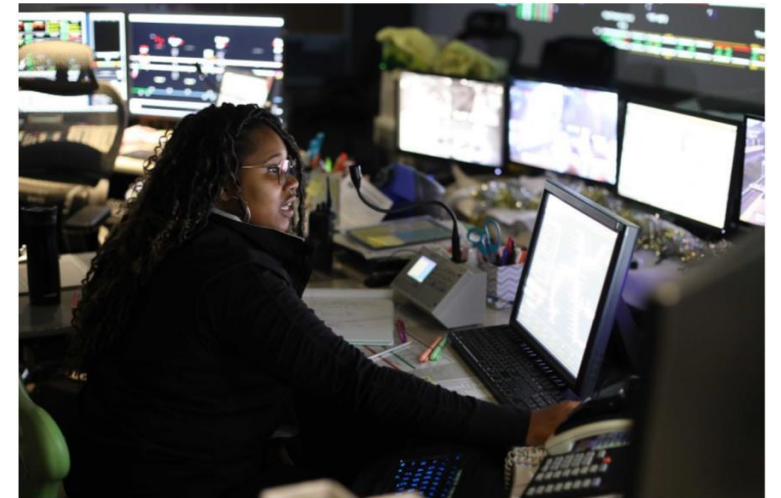
# Reliable and Coordinated Service

- Efficient Service
  - Schedule changes synched with other Bay Area transit agencies twice a year for smooth regional transfers
  - Balanced seven-day service level with timed meets
  - Twenty-minute service pattern meets evolving travel demand
  - Monitor and lengthen trains for targeted ridership growth
- Railcar fleet is new and highly reliable
  - Wet weather train operation solution is progressing
- Railway asset investment
  - Continue to improve resiliency
  - Target renewal of specific assets and maintain state of good repair



# Critical Staff for Daily Operations

- Retain critical staff and focus on hiring key positions
  - 2025 focus on more Rail Operations Controllers
  - Achieved full staffing for Train Operators, Station Agents, System Service Workers (station cleaners), and Utility Workers (car cleaners)
- Expert daily tactical operation and mitigation
  - Internal coordination and response, resource deployment, and public communications





# Continue Focus on Clean Stations and Trains

- Station Cleaning

- Five-area cleaning strategy continues to provide good oversight
- Deploy five deep-cleaning teams during graveyard hours
- Cleaning of yellow strips during non-revenue hours
- Maintain proper staffing levels and employ standardized program for new hire and recertification training

- Train Cleaning

- Nightly Yard Storage Cleaning: ensure cars meet the highest standards of interior cleanliness, safety, and appearance before morning dispatch
- End-of-line Cleaning: monitor and maintain cleanliness during revenue service, and enforce a zero-tolerance policy for offensive graffiti
- Train Interior Thorough Cleans: Doubled cleaning frequency (from every 900 to 450 run hours)



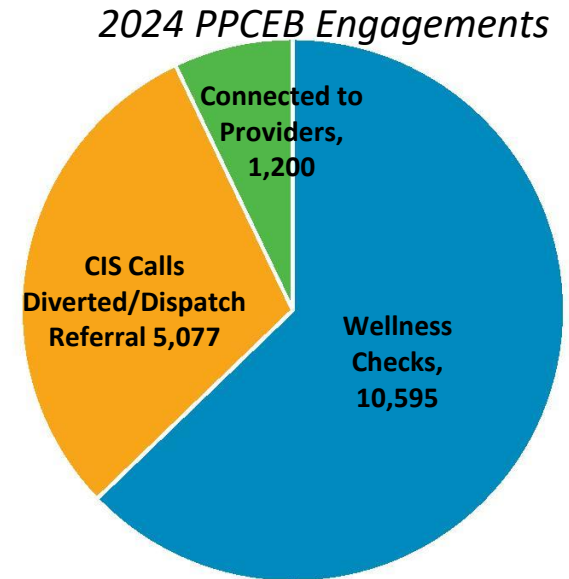
# Safety and Security: Continue to Focus on Presence

- Increase public awareness of safety efforts
- Increase presence on trains and in stations via high visibility deployment strategies
  - Zone Commanders develop strategies to address localized issues and concerns voiced by our riders
  - Teams strategically placed at stations to focus on identified safety issues
  - Alleviate influx of calls for service in the core of system from filtering out to other stations
- Successes in 2024
  - Crime was down 17% from the previous year
  - Property crimes on BART fell by 536 incidents compared with 2023
  - Response time is among the fastest for any regional law enforcement agency: Tier 1 emergency response in December was under four minutes



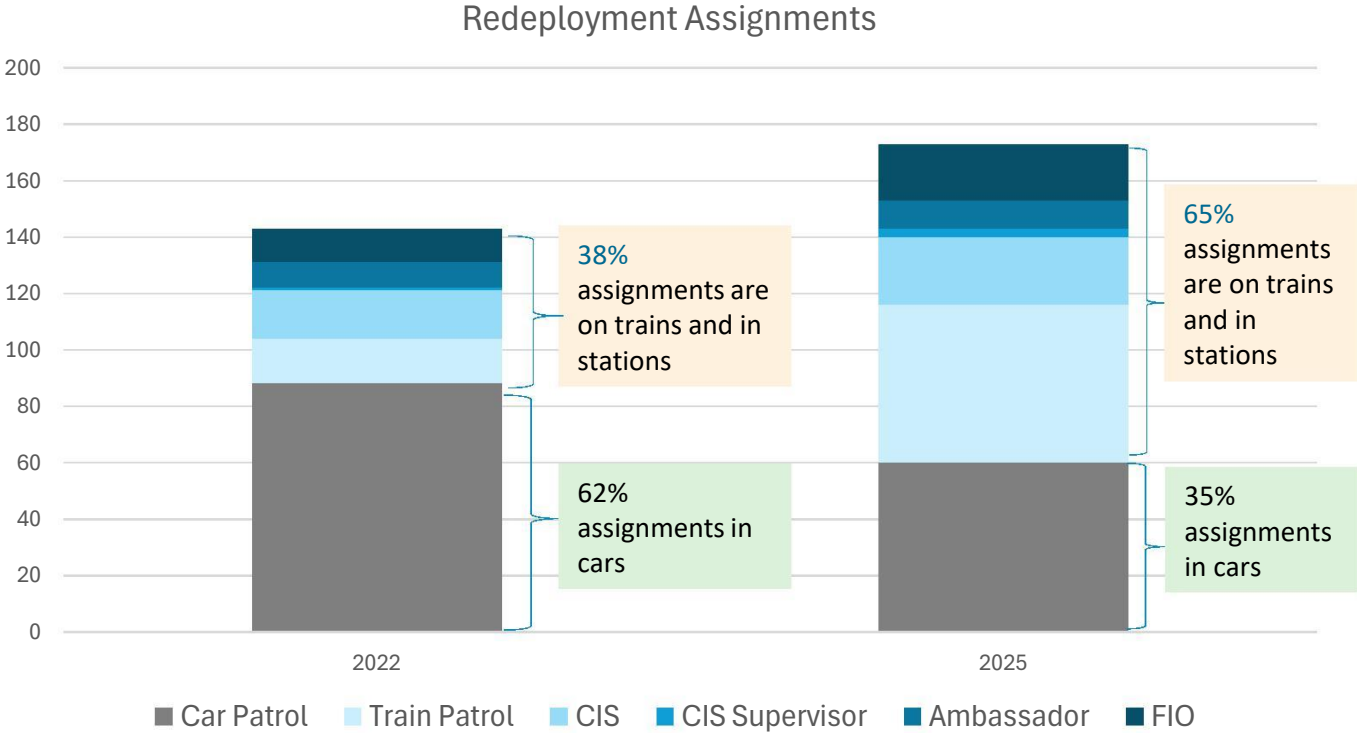
# Safety and Security: Growing the Progressive Policing and Community Engagement Bureau (PPCEB)

- Progressive Policing staff respond to calls for someone in crisis:
  - **Crisis Intervention Specialists (CIS):** assess people experiencing crises and connect them to support services and away from the criminal justice system
  - **Ambassadors:** provide a visible uniformed safety presence, monitor activities in stations and on trains, address violations of BART's Code of Conduct and act as a liaison between the District and the community
- Dispatch calls diverted or referred to CIS was 6% in 2024, exceeding the 5% goal and freeing up sworn officers for other priorities
- Community engagement initiatives:
  - Build trust between police and the community, leading to stronger partnerships in solving crimes and addressing concerns
  - Allow the community to engage on how our police department operates, promoting accountability and transparency



# Safety and Security: Continue to Focus on Presence

- Continue to grow and allocate resources where needed
- Shifting focus from car patrol to establishing presence on trains and in stations
- Average weekday (morning and afternoon shift) on-duty deployment 64% - 74% on trains (Train Officers, Ambassadors, CIS, and Fare Inspection Officers (FIO))



# Safety and Security: Continue Focus on Hiring and Retention

- Moving in the Right Direction

- Working hard to recruit officers to increase our visible safety presence
- Increased year-to-date hiring from 36 officers in 2023 to 42 officers in 2024
- Reduced sworn police officer vacancies to 16
- Actively recruiting dispatchers – critical work behind the scenes
- CIS and Ambassadors:
  - Added 4 CIS positions and 1 Progressive Policing Supervisor in December 2024
  - Current staffing: 22/24 positions filled for CISs, 8/10 for Ambassadors, 3/3 for Supervisors

- Prioritize recruitment to ensure staffing levels for presence

- At least 50% of officers dedicated to trains
- 100% of progressive policing staff dedicated to uniformed presence

- Hiring is dynamic and constantly changing due to circumstances such as regional competitiveness and retirements



# Key Rider Experience Initiatives – New Fare Programs

- Clipper BayPass – the region's first all-agency pass
  - Led by BART and MTC
  - Phase 1 pilot brought all-agency passes to 50k+ students and affordable housing residents
  - Phase 2 pilot has already signed up 10 institutional customers and more than 30,000 passholders
- Free and Discounted transfer pilot
  - Will offer standardized transfer discounts between all agencies so riders can use all services as one network without paying extra
  - 18-24 months pilot will begin with Next Gen Clipper
- Clipper START
  - 50% discount for eligible low-income riders on all regional services
  - Since BART increased our discount to 50%, Clipper START trips have more than doubled

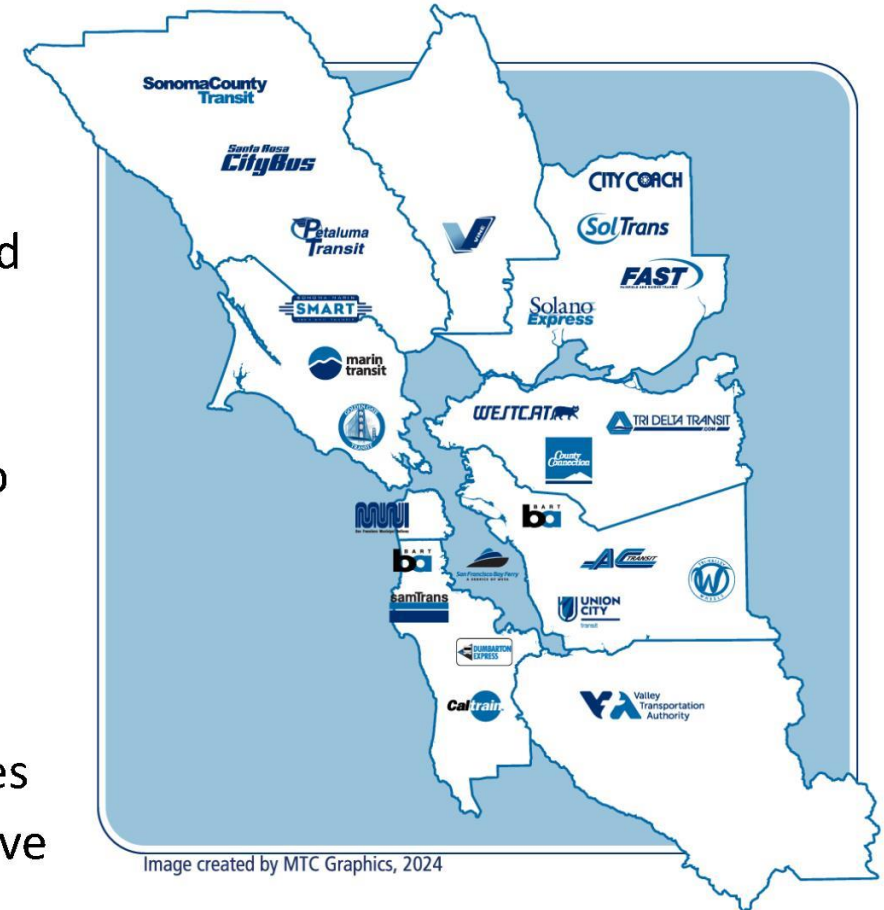



Image created by MTC Graphics, 2024

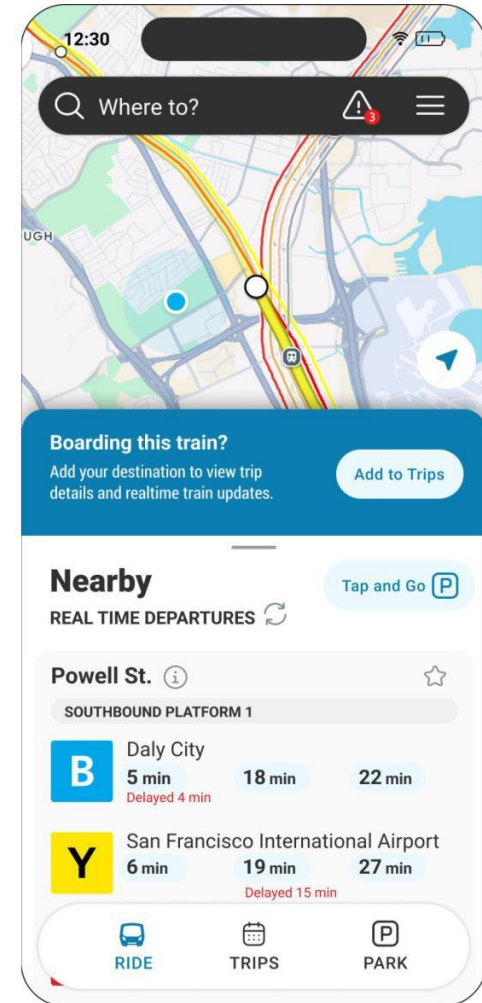
# Key Rider Experience Initiatives – Helpful Information

- Regional Mapping and Wayfinding Project
- El Cerrito del Norte, Powell, Millbrae, Dublin
- New directional signs to show how to get to Chase Center at Powell St
- Filling empty display cases with more maps and helpful information
- Trip Planner now showing when stations are closed
- Customer comments, inquiries, and maintenance issues: [bart.gov/report](http://bart.gov/report)



# Key Rider Experience Initiatives – App Redesign

- Modern look, less clicks, and new features
- Streamlined process and "where to" function
- Map that shows real time location of all trains 
- Will now show the full BART trip and update in real time what station is next and arrival time (as opposed to the schedule-based itinerary)
- Customized notifications, reporting feature will be easier to find
- Deep link to Next Gen Clipper app
- Ability to use Clipper to pay for non-transit options (parking and paratransit)
- Late summer deployment



*Design concept not final*



# Discussion

# Appendix Full Customer Satisfaction



# Background

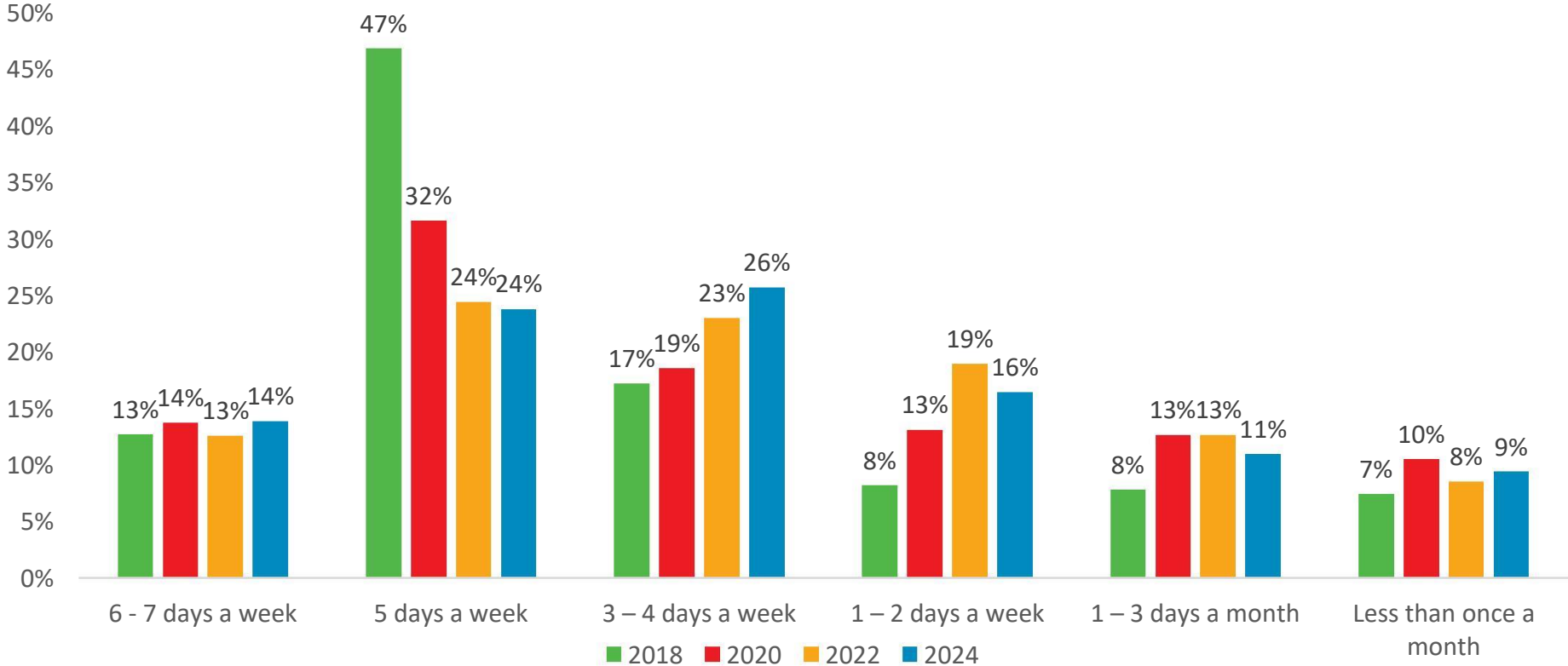
- Large survey of riders via onboard intercept
  - Designed to be representative of overall ridership
  - Conducted every two years since 1996
  - Data broadly used – informing budget priorities, Title VI reporting, ad hoc analyses
- Objectives
  - Gauge current levels of overall customer satisfaction
  - Obtain feedback on specific service attributes
  - Prioritize areas that need improvement
  - Obtain demographics of current riders and compare to prior years

# Methodology

- Questionnaires distributed onboard representative sample of runs
  - 97 weekday runs, 27 Saturday runs, and 18 Sunday runs (142 total)
- Majority collected onboard via paper questionnaires (79%)
  - Completed online (19%); mailed-in (2%)
- Survey fielded from Oct. 8th – Nov. 9th
- Questionnaire available in English, Spanish and Chinese
- Sample size: 4,687
  - Sample size in 2022: 3,022
- Note slight difference in satisfaction between Passenger Experience Survey (PES) results and this study

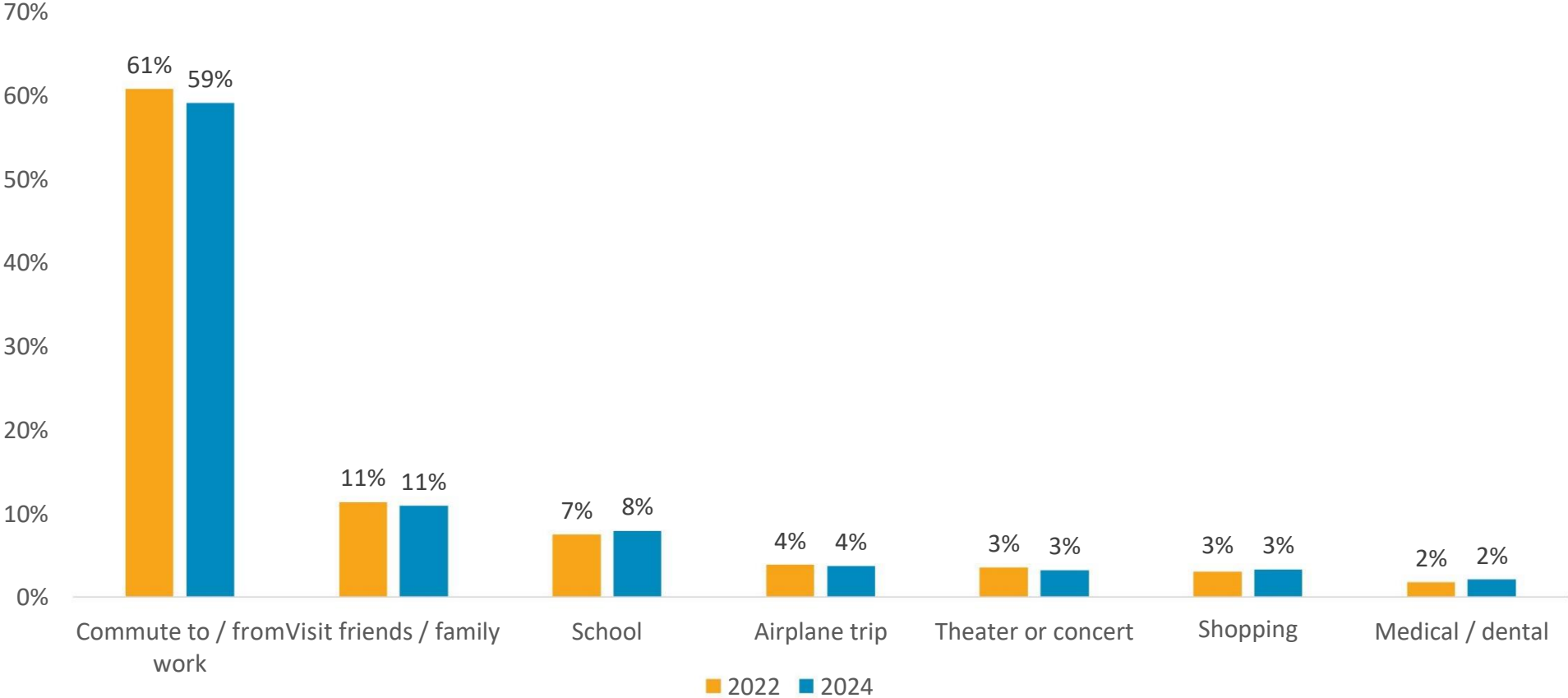
# Frequency of BART Ridership

- 5 day a week riders have dropped from 47% pre-COVID (2018 survey) to 24% in the last two surveys
- Those riding 1 – 4 days a week comprise 42%



# Primary Trip Purpose

- Trip purposes are very similar to 2022

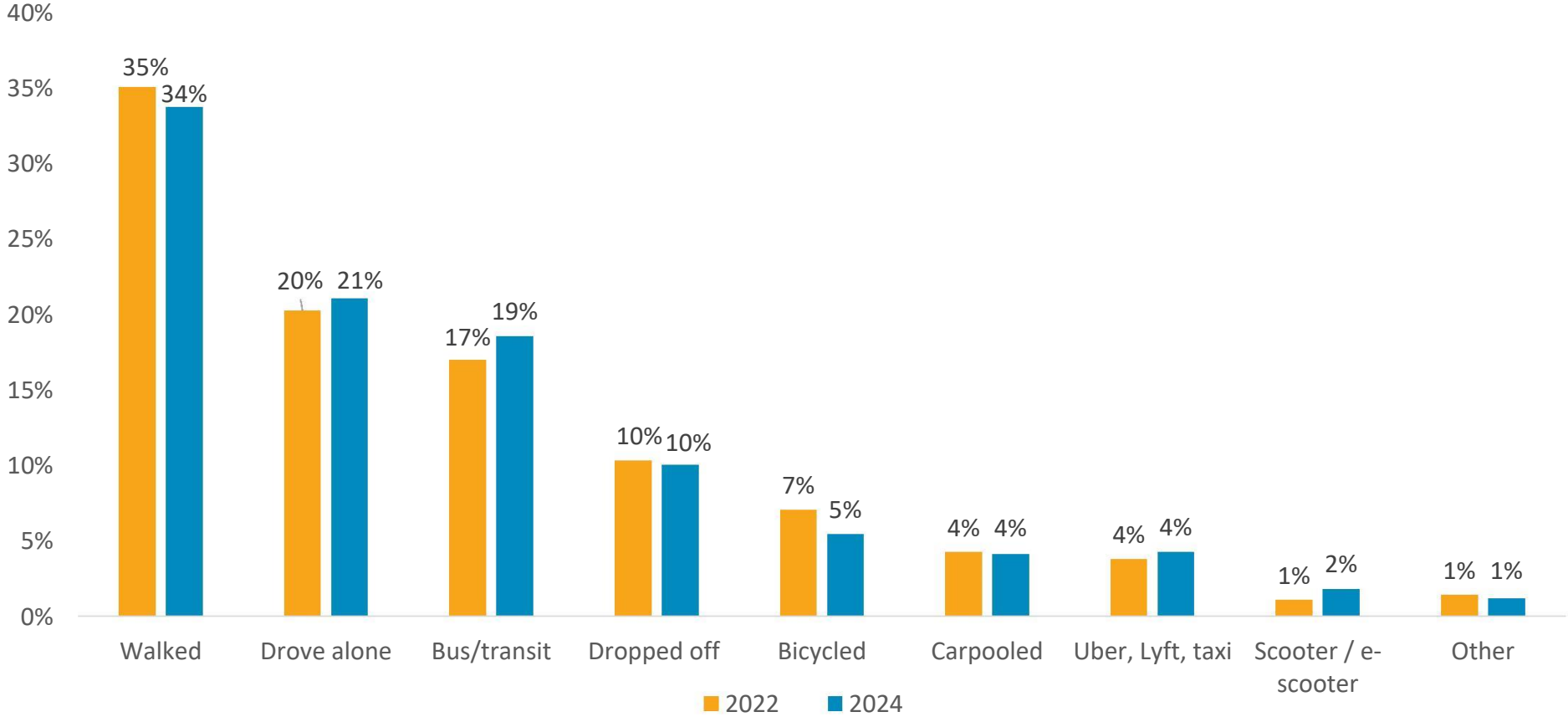


*Other trip purposes not shown on this chart accounted for 8% in 2022 and 10% in 2024.*



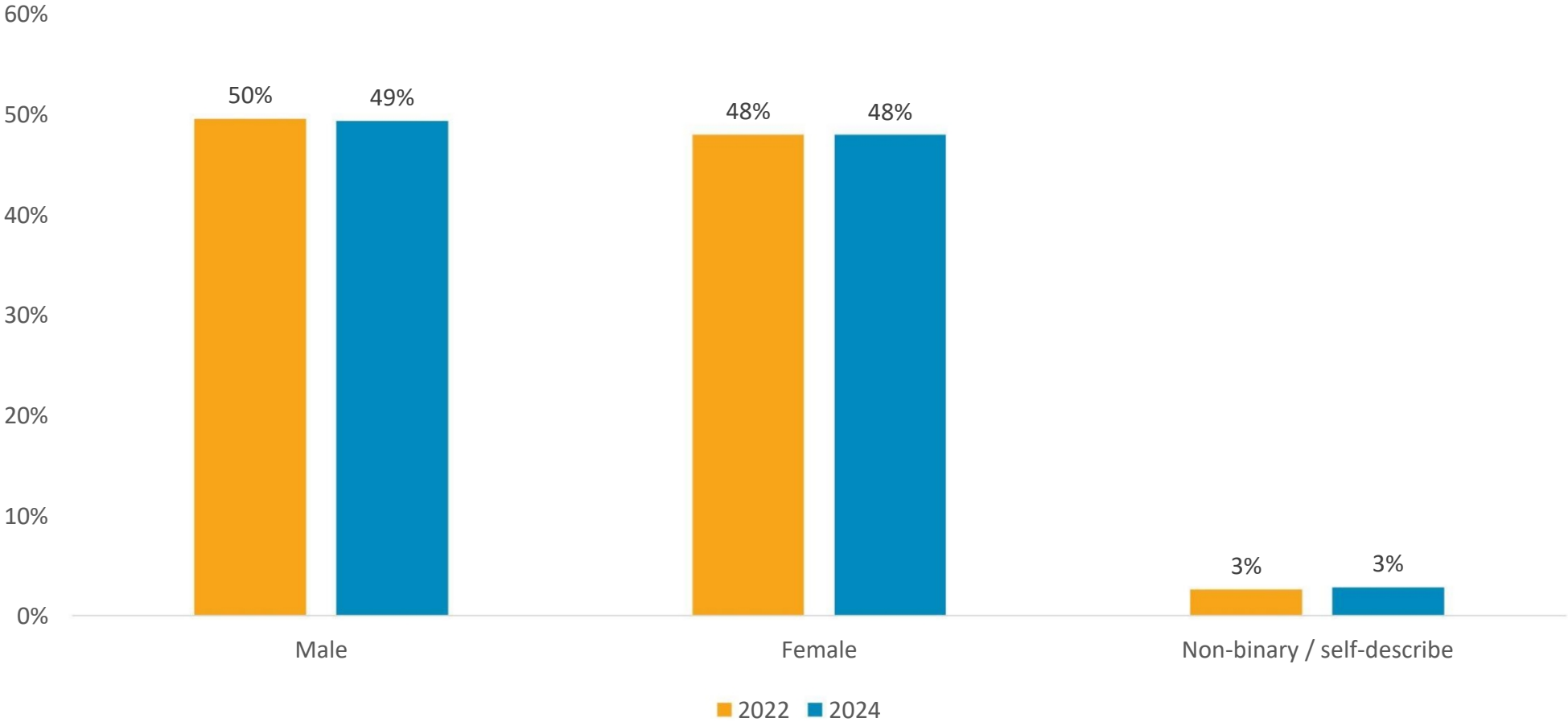
# Station Access Mode

- Access modes from home to BART are very similar to 2022
- Bicycle access has decreased slightly, while transit and scooter access have increased slightly



# Demographics: Gender

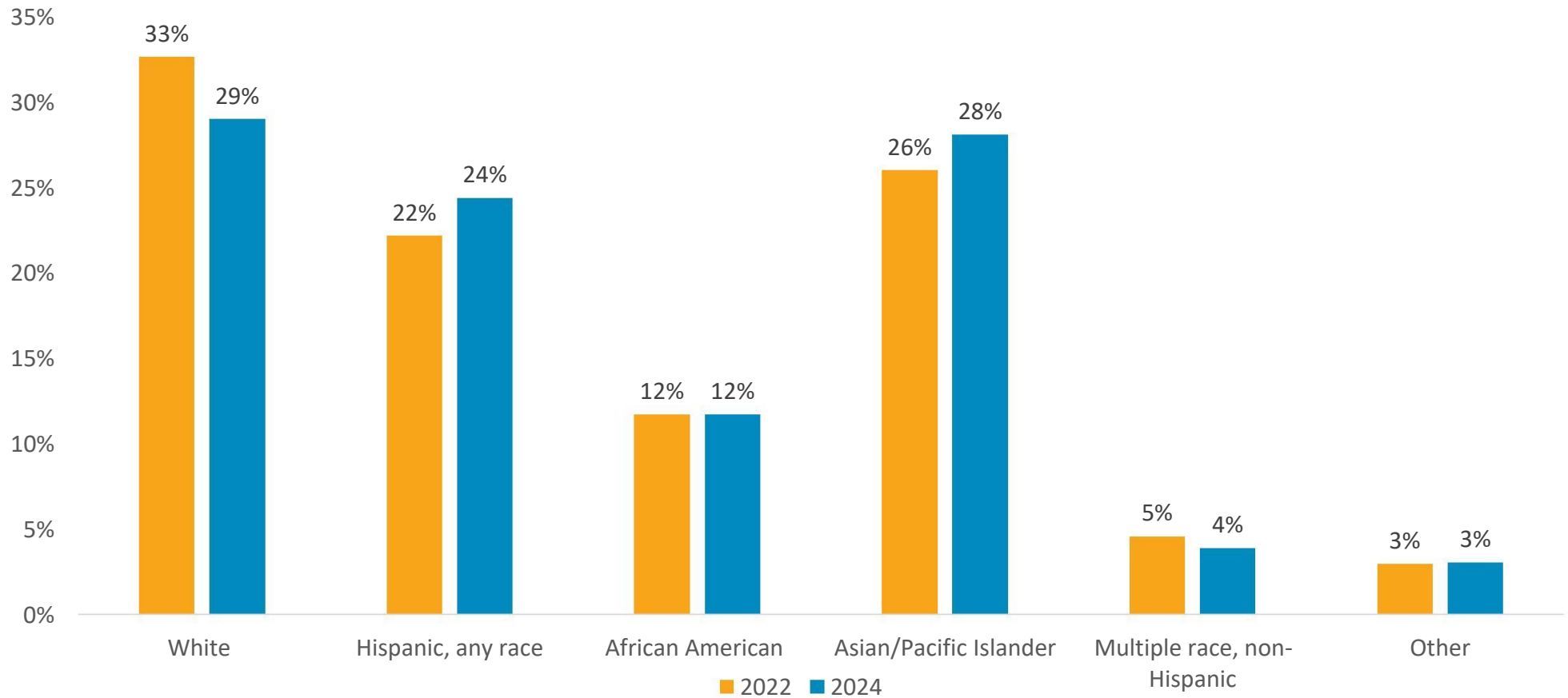
- The gender split is very similar to 2022





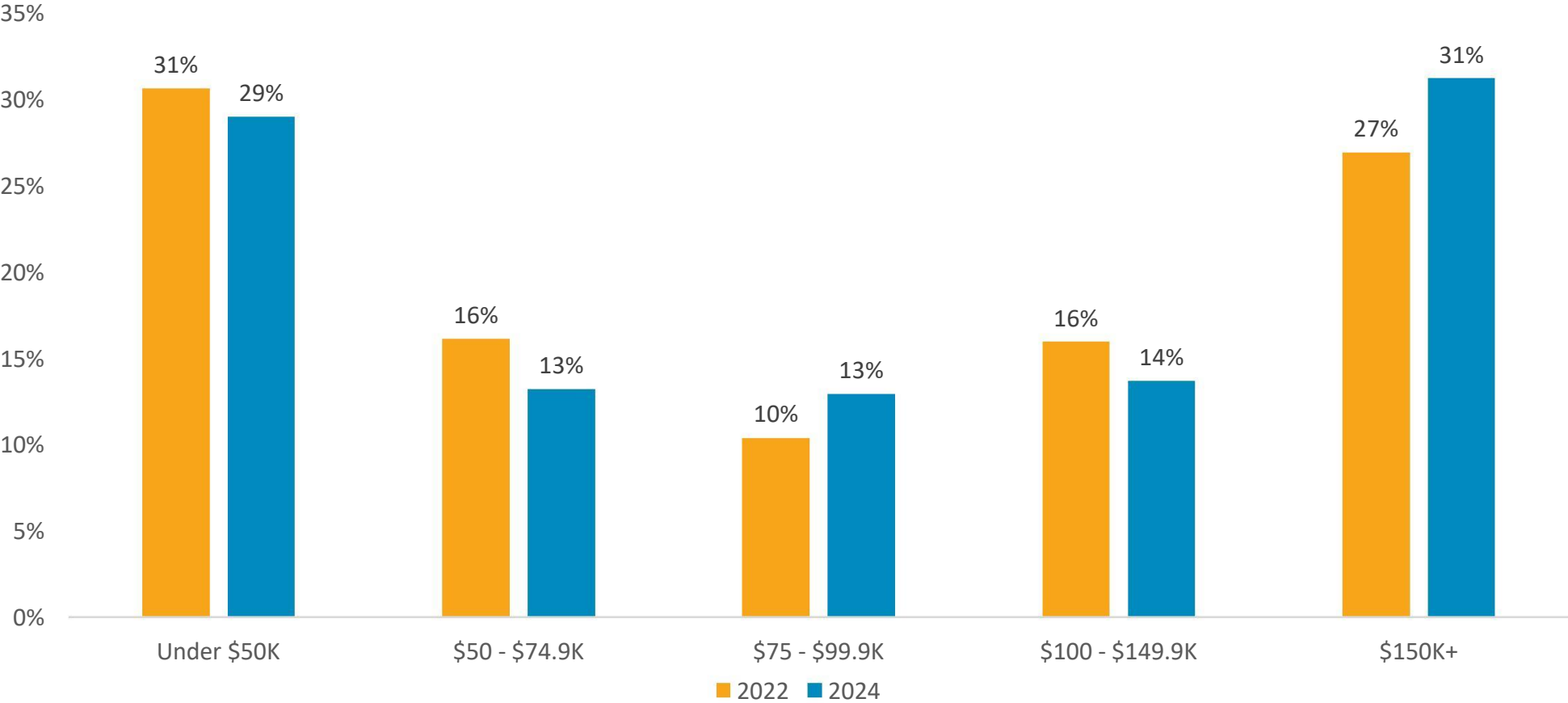
# Demographics: Race

- The percentage of riders identifying as White has decreased vs. 2022, while percentages of Hispanic and Asian riders have increased



# Demographics: Household Income

- Household income levels are somewhat higher compared to 2022\*

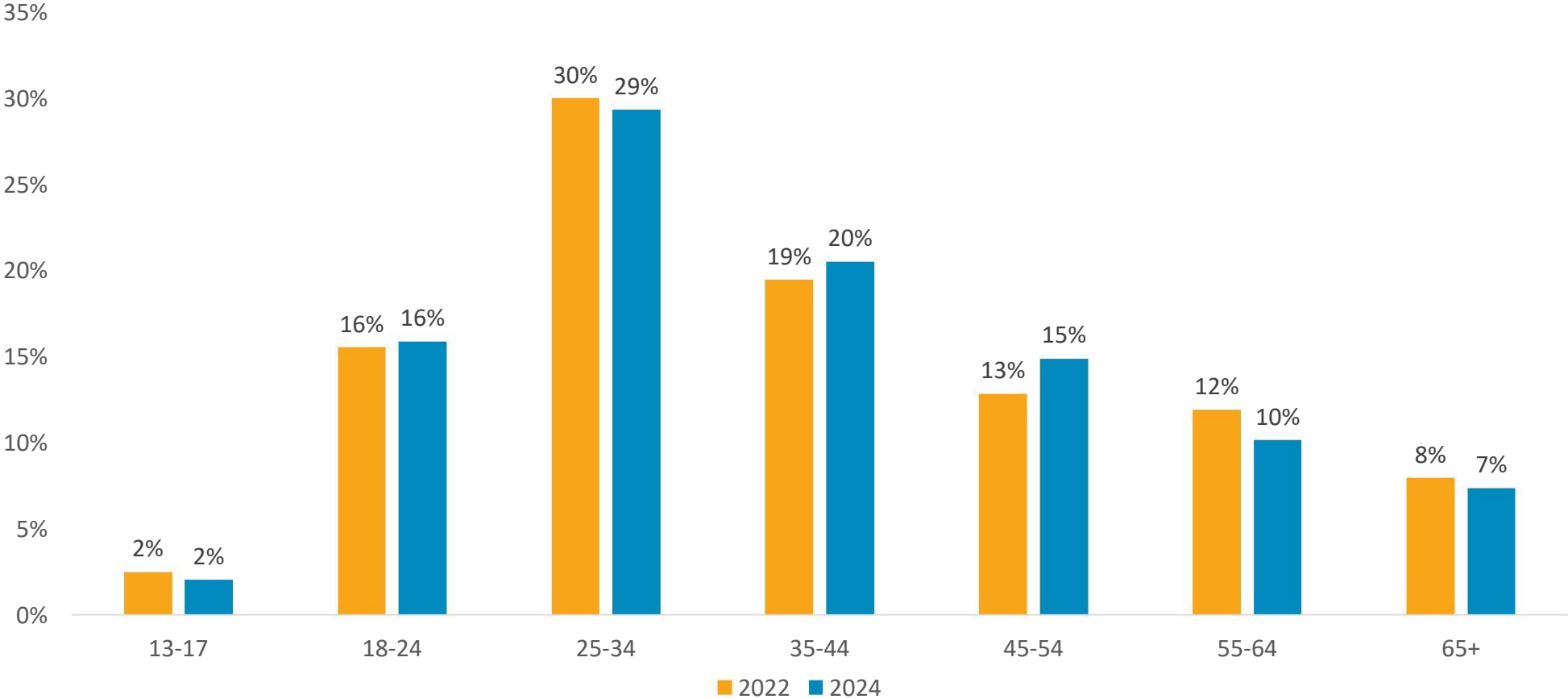


\*Note that household income data are not adjusted for inflation.



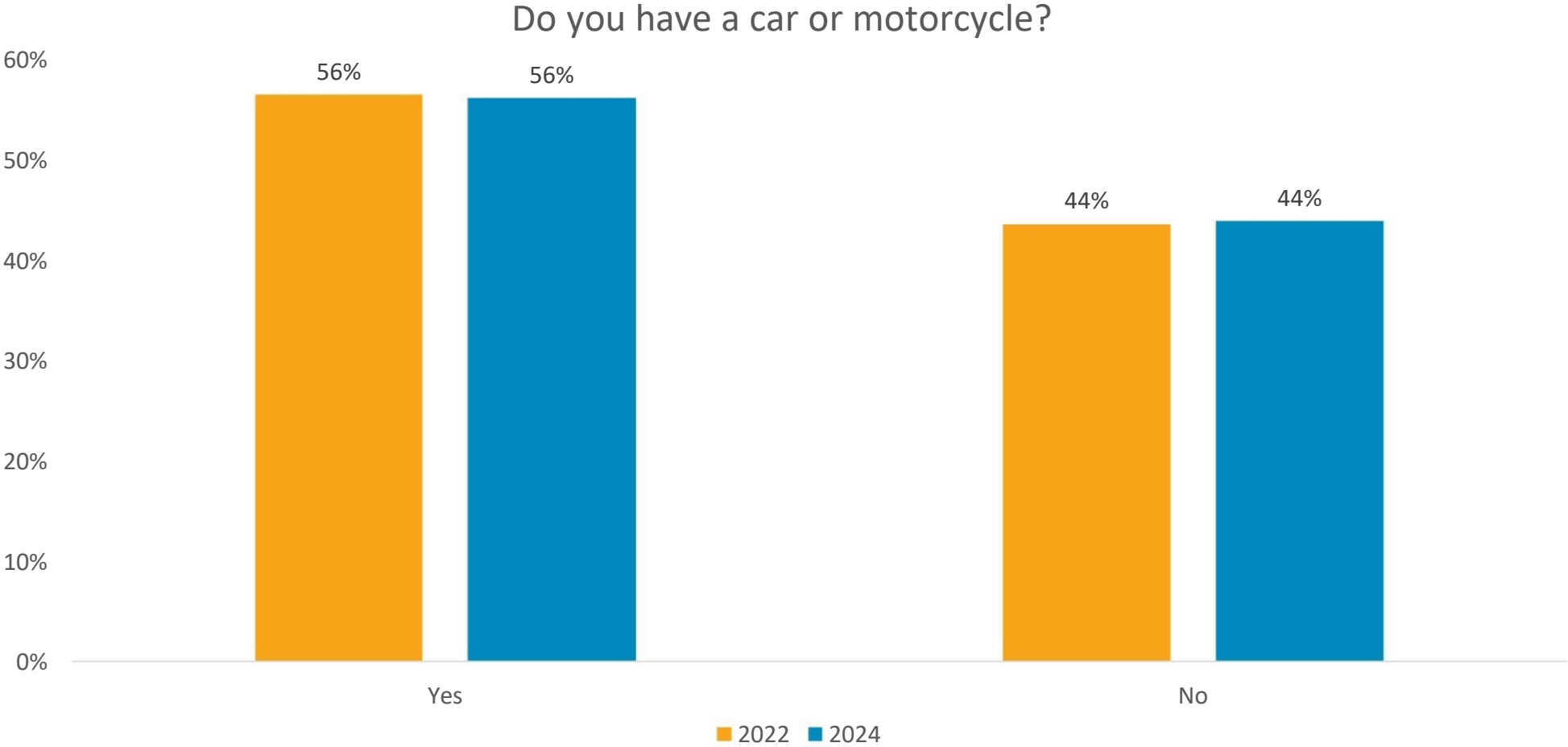
# Demographics: Age

- Riders' age distribution is very similar to 2022



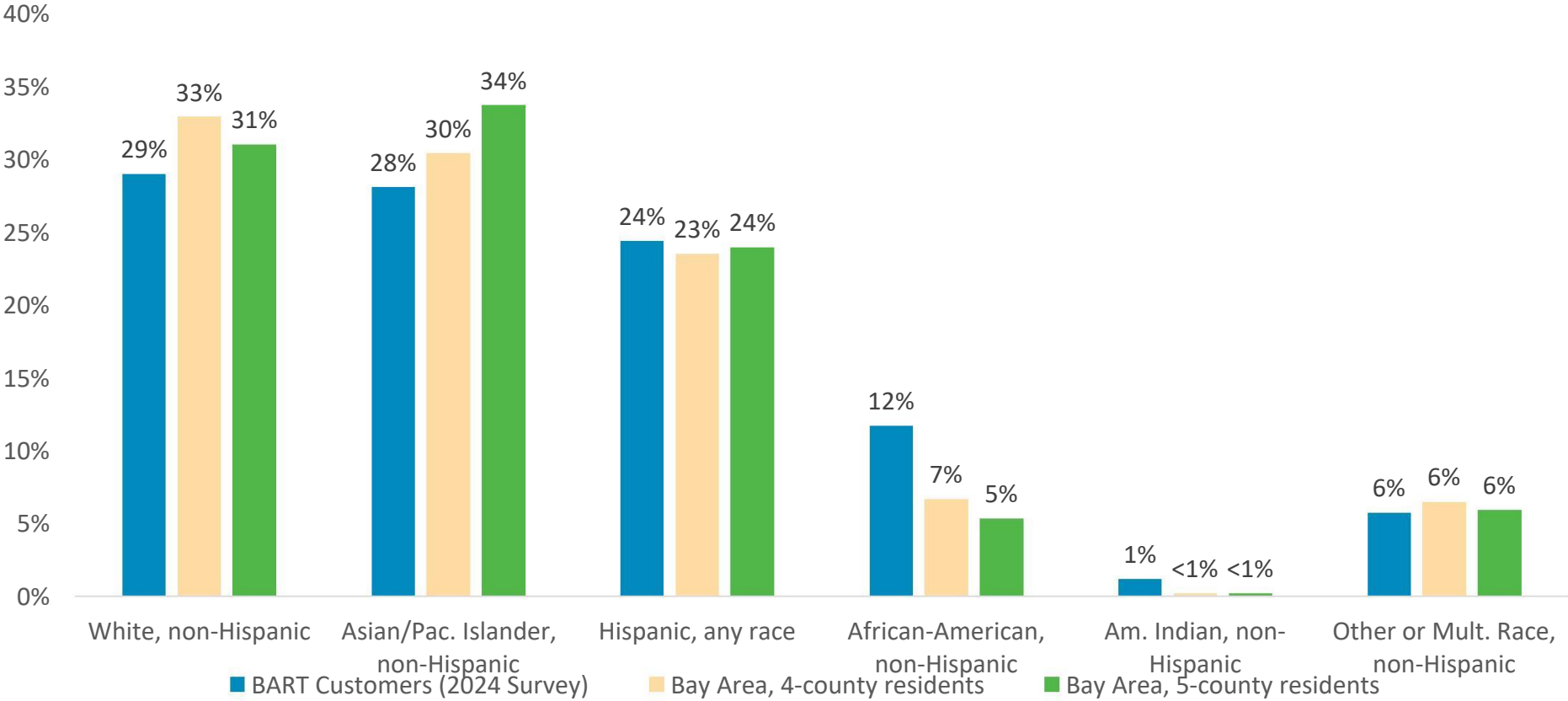
# Demographics: Vehicle Ownership

- The majority of riders have a car/motorcycle, matching 2022 data

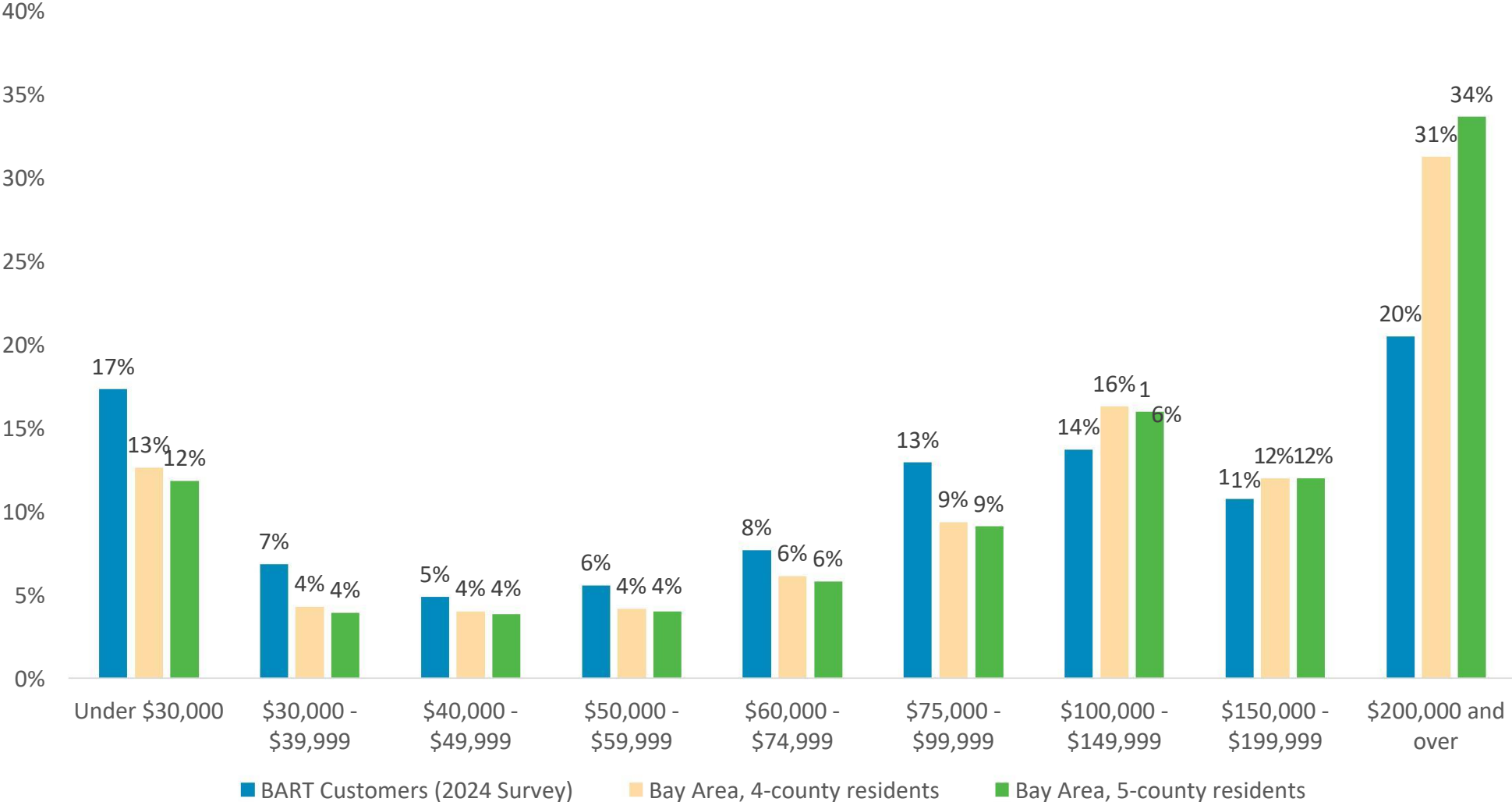


# Demographics: Race (Census Comparison)

- Compared to overall Bay Area residents, BART riders are less likely to be White or Asian, and more likely to be African American



# Demographics: Household Income (Census Comparison)



# Additional Verbatim Comments

*I love the new trains and feel it's much cleaner.*

*New cars increase overall train ratings; noise between Embarcadero and Lake Merritt is harmful; OK elsewhere.*

*I know you guys are trying hard. I wish you luck. I'm hoping you guys still exist. Society's problems are killing you.*

*It's not as bad as it used to be, 2 or 3 years ago, it was a zoo on the train - not safe.*

*Love BART. Would love to see cleaner trains and less homelessness in general, but that is hard for BART to enforce given the current state of the Bay.*

*It's unsettling to see people sleeping on the seats. It's also annoying when people usually young take over a whole bench with their feet and do not clear as train starts to fill up.*

*I wish I could take BART more, specifically at night. Safety is my biggest concern on BART. Especially at night.*

*Homelessness, aggressive panhandling and filth in the trains and stations have turned me to driving as often as I can for the first time in 20y. I will no longer take BART outside of commuter times, given the clear personal risk of being alone in a car.*

*I think I would ride BART more post-COVID, but I am still concerned about safety and think the system has to overcome the stigma of homelessness on trains and people being attacked with meat cleavers, etc...*

*I ride BART and am always advocating for how great it is, but my biggest issues with BART: -there is human feces on the farthest east stairwell in the Embarcadero station almost every day -I have multiple times had people smoking on the train (pot and crack) and they get away with it -People regularly hop over the fare gates in the Embarcadero Station -Way too often there are fentanyl addicts passed out on the train.*

# Additional Verbatim Comments

*Fare evasion has improved due to the gates...from what I've seen, fare evaders are the ones who cause the most disruption (bad smell, loud sounds, loitering the trains)*

*...Do see an improvement on Civic Center platform due to new fare gates - need to speed up installation at all stations.*

*We need more trains or train cars during busy hours! It's so uncomfortable being squeezed in a train when only 6 cars are attached. When we know you all can do up to 10. Lots of positives though. Response time for a disruptive passenger from BART police is good! Very very happy about the new fare gates!*

*I've been happy to see the system improving. I would like to see consistency with the bathrooms working, being open, and staffed. A bathroom is a big deal for a long trip. Fare evasion has gotten better, and I know the new gates are coming.*

*...You have issues when it rains, when it's too windy, when it's too hot, when it's too cold, or when someone sneezes too hard in a train. This is the biggest reason why I can't recommend BART and tell people to take a Lyft or Uber if they need to be somewhere on time.*

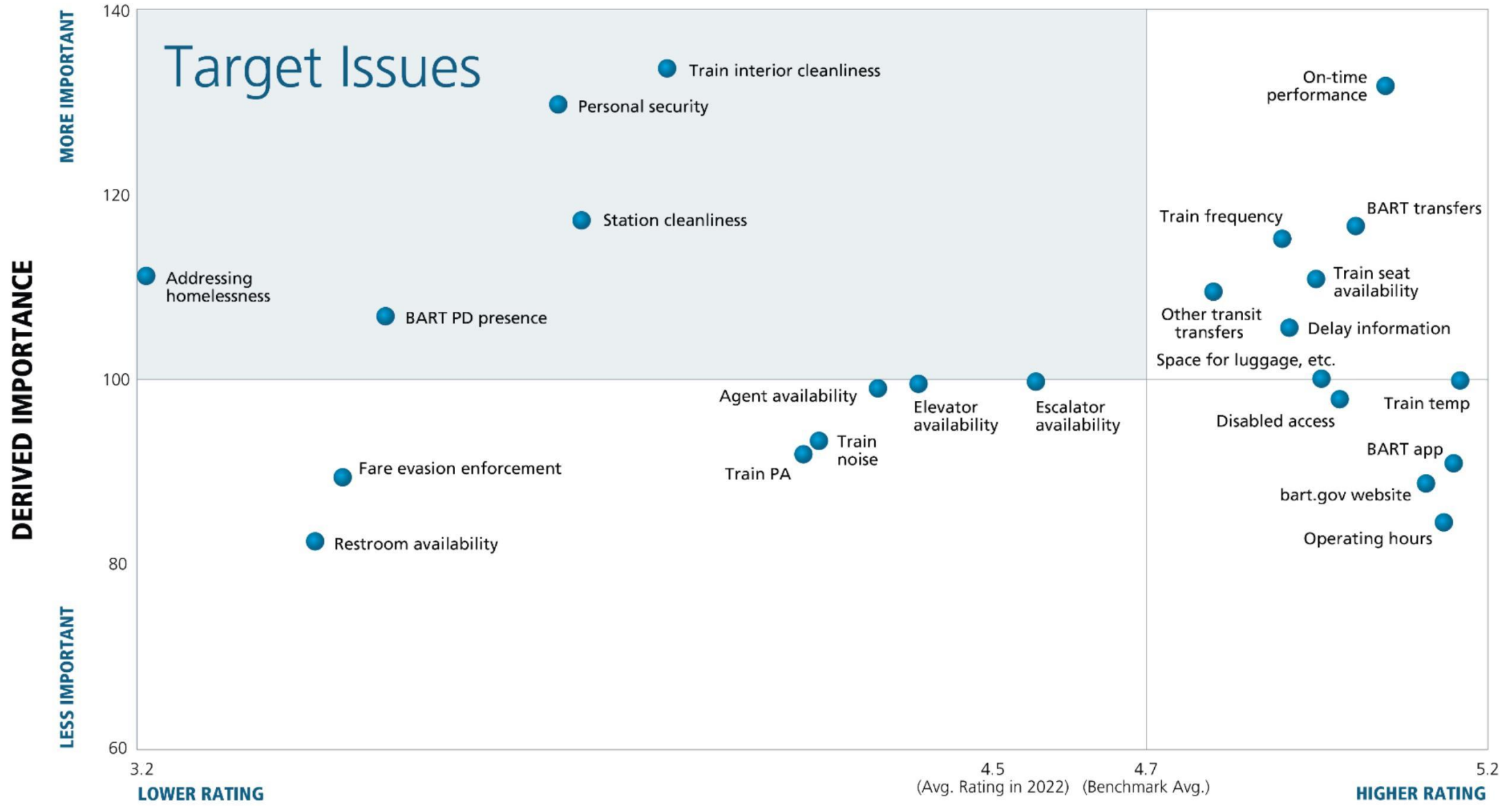
*I used to use Antioch E-BART. But so many delays. I now drive to Pitt/Bay Point everyday from Antioch.*

*Could you please have the blue train run more frequently than once every 20 mins?*

*I thank you guys for getting me everywhere. I can't afford a car, and I'm an older sister taking care of her younger siblings, and BART and Muni are the best. Thank you guys so much!*



# 2022 Quadrant Chart





# ▶ Transit-Oriented Development Program Update

Board of Directors | February 13, 2025



# Agenda

- Policy Overview
- Project Updates
- Financial Context
- Upcoming TOD Board Items

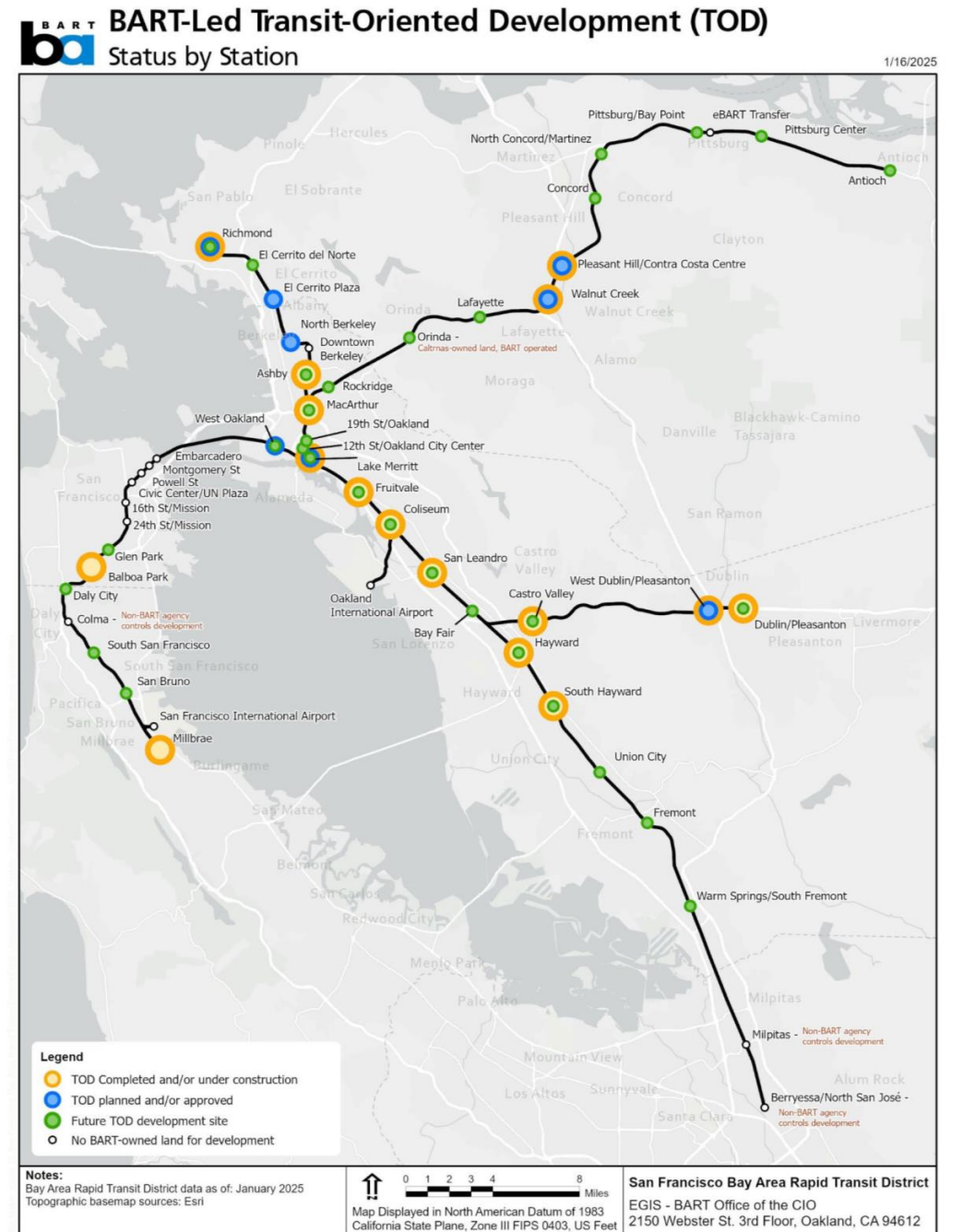
# BART TOD Overview

## TOD sites:

- 250 acres of developable land
- At 27 stations
- Across 22 jurisdictions
- ~28,000 potential new homes

## TOD Benefits:

- **Grow BART ridership:** TOD residents are 2x as likely to ride BART vs non-TOD residents
- **Climate Action:** Housing near transit produces 50% fewer auto trips vs conventional development
- **Lower Cost of Living:** Transportation costs for those living near BART are 24% lower than average



# BART TOD Goals

- A. Complete Communities.** Partner to ensure BART contributes to neighborhood/district vitality, creating places offering a mix of uses and amenities.
- B. Sustainable Communities Strategy.** Lead in the delivery of the region's land use and transportation vision to achieve quality of life, economic, and greenhouse gas reduction goals.
- C. Ridership.** Increase BART ridership, particularly in locations and times when the system has capacity to grow.
- D. Value Creation and Value Capture.** Enhance the stability of BART's financial base by capturing the value of transit, and reinvesting in the program to achieve TOD goals.
- E. Transportation Choice.** Leverage land use and urban design to encourage non-auto transportation choices both on and off BART property, through enhanced walkability and bikeability, and seamless transit connectivity.
- F. Affordability.** Serve households of all income levels by linking housing affordability with access to opportunity.

*Board update adopted April 2020*

# Key BART TOD Policies

- **TOD Policy (amended 2020)**
  - Outlines vision and goals for BART's TOD program
- **Project Stabilization Agreement Policy (2011)**
  - Developers to reach agreement with county building trades councils for TOD construction
- **Station Access Policy (2016)**
  - BART rider access and investment priorities by station type
- **Affordable Housing Policy (2016)**
  - 20% of units must be affordable in residential TODs; 35% goal portfolio-wide, per TOD Policy
- **TDM Program (2021)**
  - Developer to provide transportation demand management ("TDM") measures to support walking, biking, transit among TOD residents/employees
- **Affordable Housing Financial Return Framework (2021)**
  - Land value discount of up to 60% to support inclusion of affordable housing

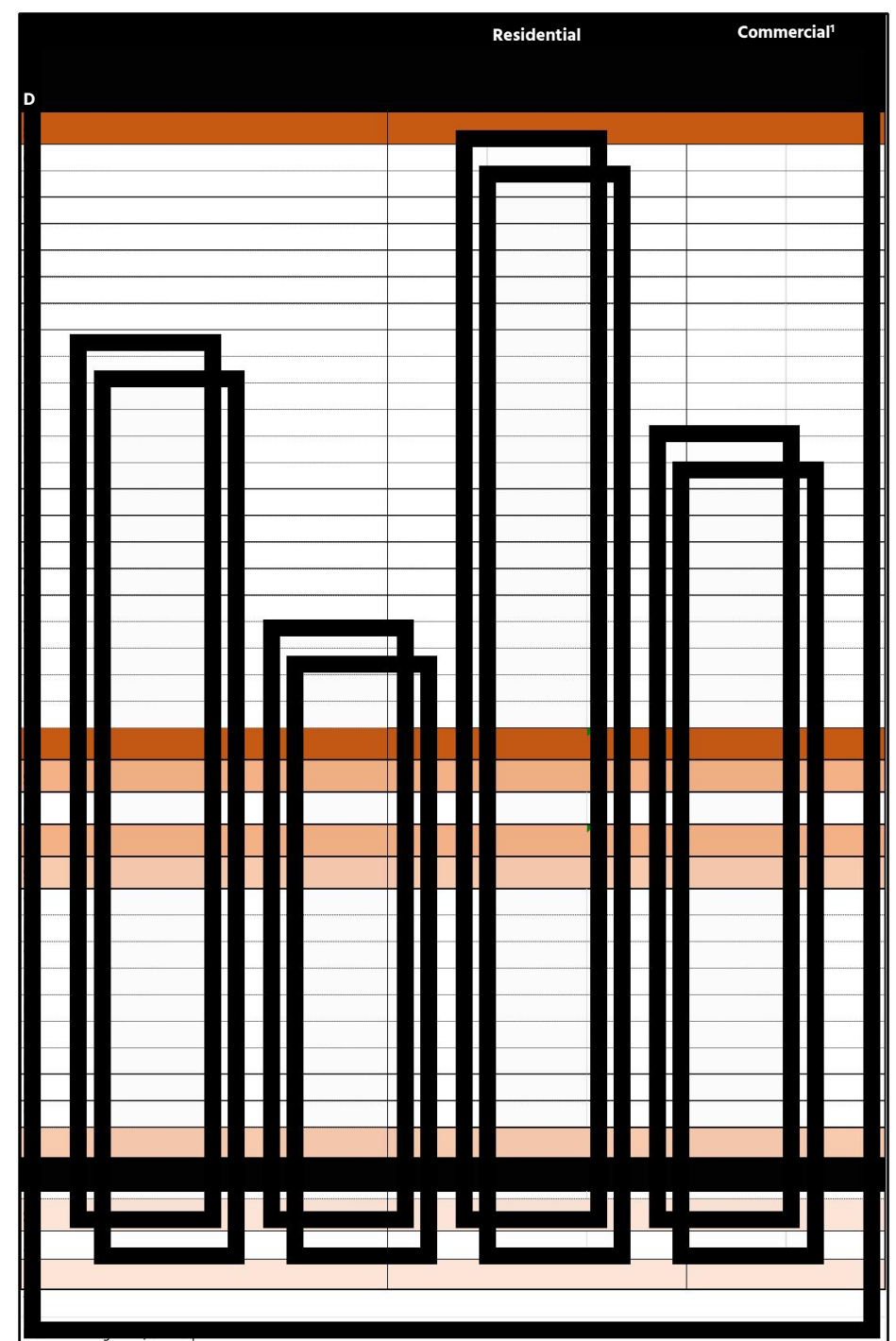
# BART TOD Portfolio

## Existing TODs:

- 15 stations
- ~875,000 sq ft commercial
- Over 4,200 homes, 1,300 (30%) affordable
- 8 TODs in predevelopment

## Future TODs:

- 10 stations
- Active developer negotiations, entitlements, design review, and permitting
- ~970,000 sq ft commercial
- ~4,000 homes, ~1,680 affordable (44%)



# Progress Toward BART TOD Performance Targets

## 2040 Targets:

- 20,000 housing units, 35% affordable
- 4.5M sq ft commercial

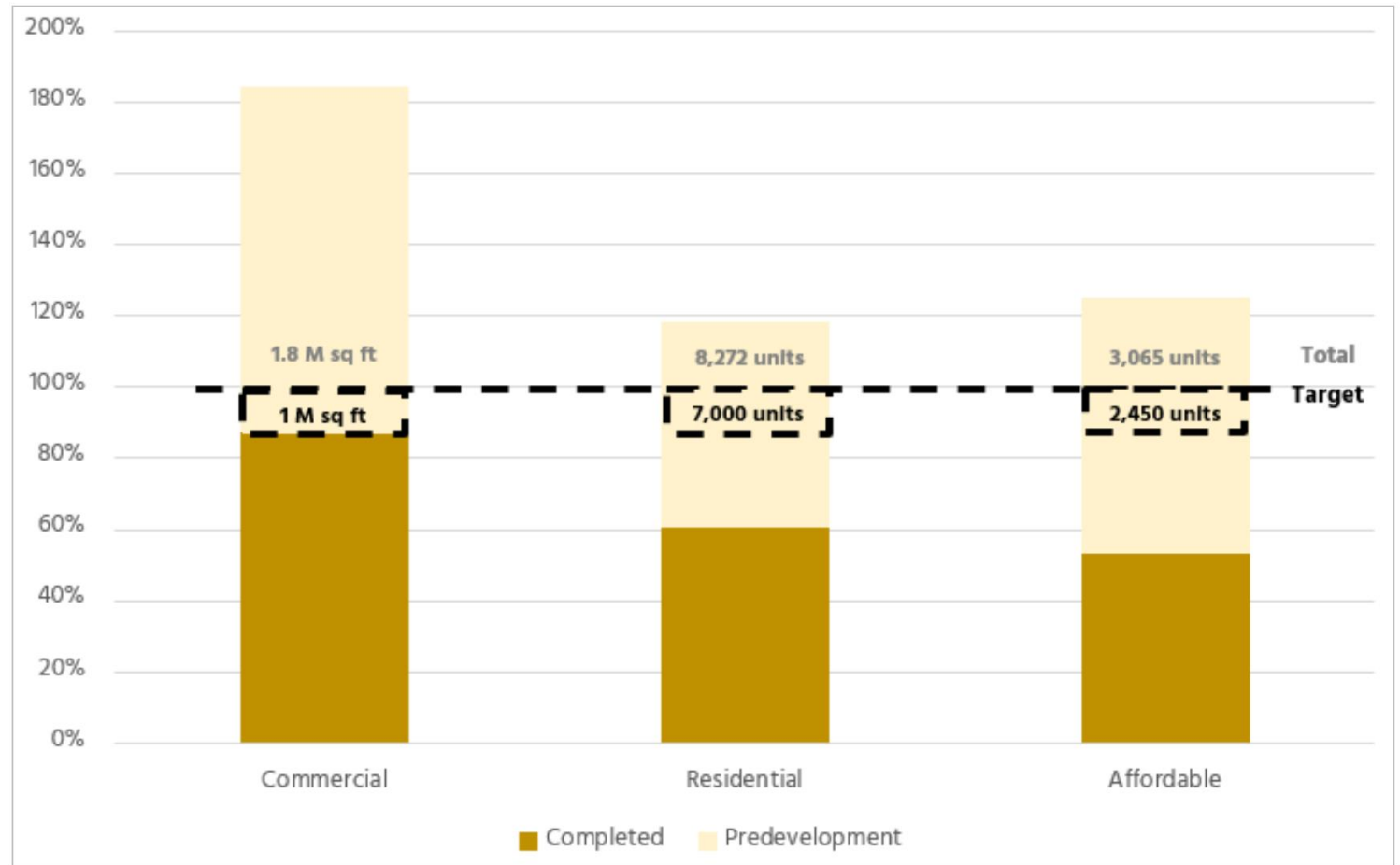
## 2025 Mid-Term Targets:

- 7,000 housing units, 35% affordable
- 1M sq ft commercial

## Completed:

- 4,200 housing units, 30% affordable
- 875,000 sq ft commercial

### 2025 Performance Goal Targets Progress





# BART TOD vs. Conventional Development

## TOD projects are unique:

- Uninterrupted service and rider access to transit required
- Infrastructure considerations
- Station area and access improvements

## Public agency & public land:

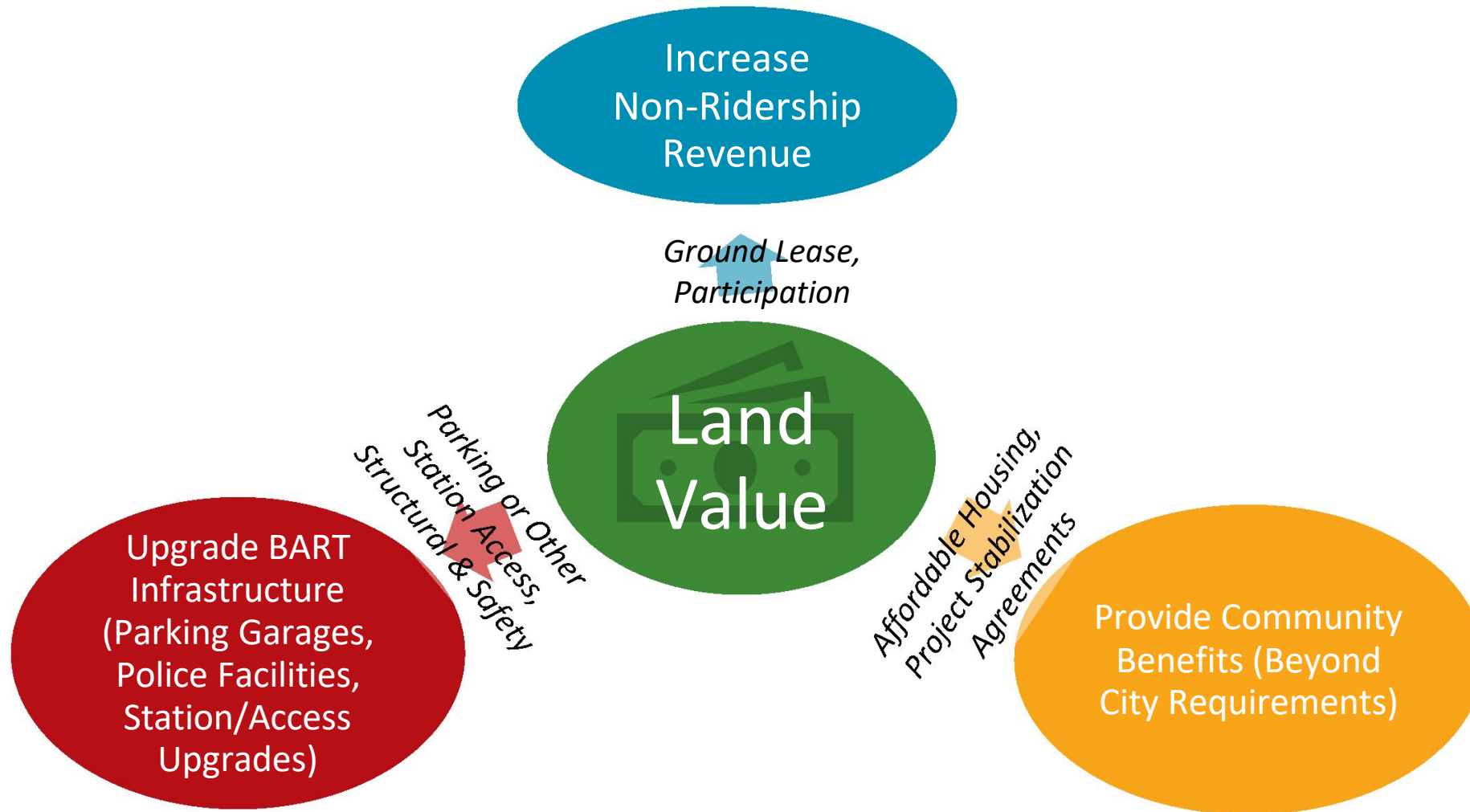
- BART policies: labor requirements, affordable housing minimums
- BART permitting and facilities standards
- State regulations: Surplus Land Act; streamlining (AB 2923)

## Funding:

- Eligible for special transportation and housing funding
  - Transit and Intercity Rail Capital Program (TIRCP)
  - Affordable Housing and Sustainable Communities (AHSC)

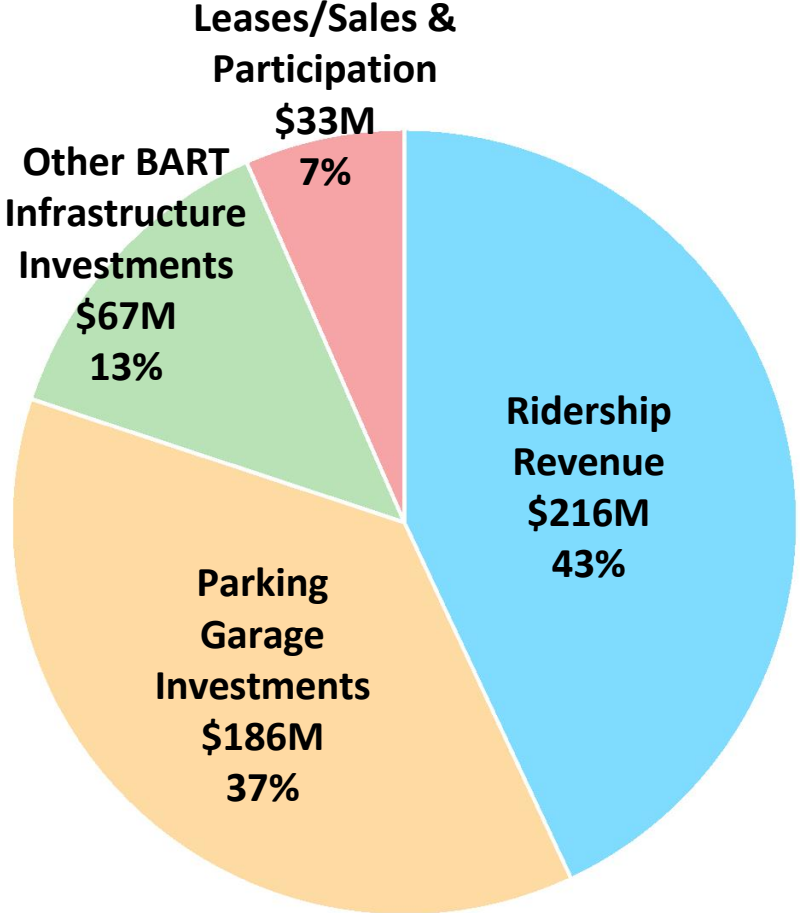


# BART TOD Financial Return



# BART TOD Financial Return

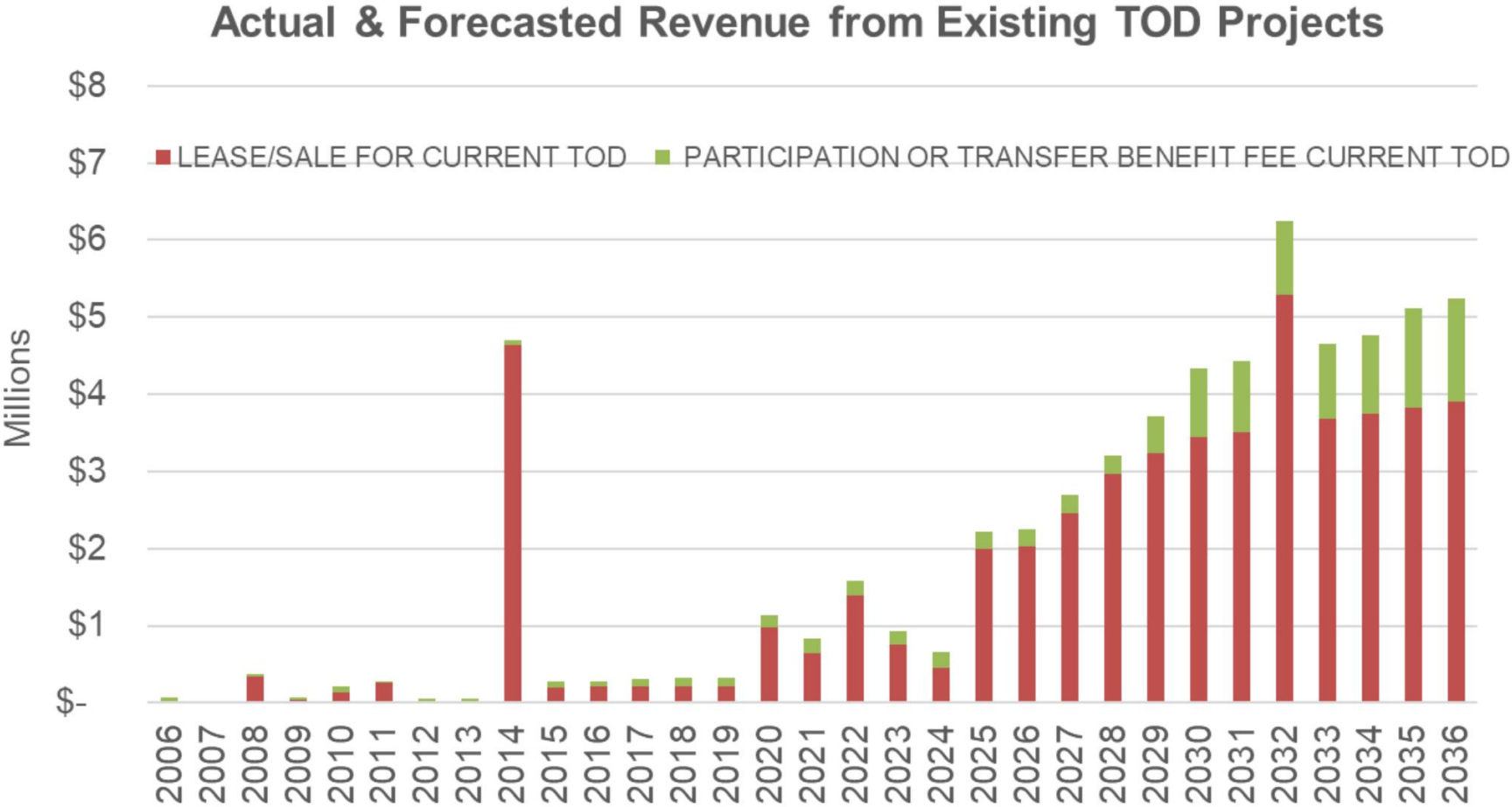
**Total Revenue  
2010-2040  
\$502M**



*Chart only includes completed TOD projects; does not include projects under construction, in predevelopment, or future projects.*



# BART TOD Revenue: Leases/Sales & Participation



*Chart not reflective of (1) Value to BART of replacement rider parking garages, or (2) Revenue from planned but unbuilt TOD projects/phases.*

# Status of Current Projects

## Pre-solicitation Planning:

- **Bay Fair Station**
- **Fremont Station**
- **Hayward Station**

## Solicitation:

- **Ashby Station** (RFP issued)

## Pre-entitlement - Planning, Entitlements, Negotiations:

- **North Berkeley Station** (ENA)
- **Pleasant Hill Station** (DDA)

## Preconstruction - Design Review, Permitting, Negotiations:

- **El Cerrito Plaza Station** (Signed option; construction pending funding)
- **Walnut Creek Station** (Signed option; construction pending funding)
- **West Dublin/Pleasanton Station** (Signed Ground Lease; construction pending funding)
- **West Oakland Station** (Signed option; construction pending funding)

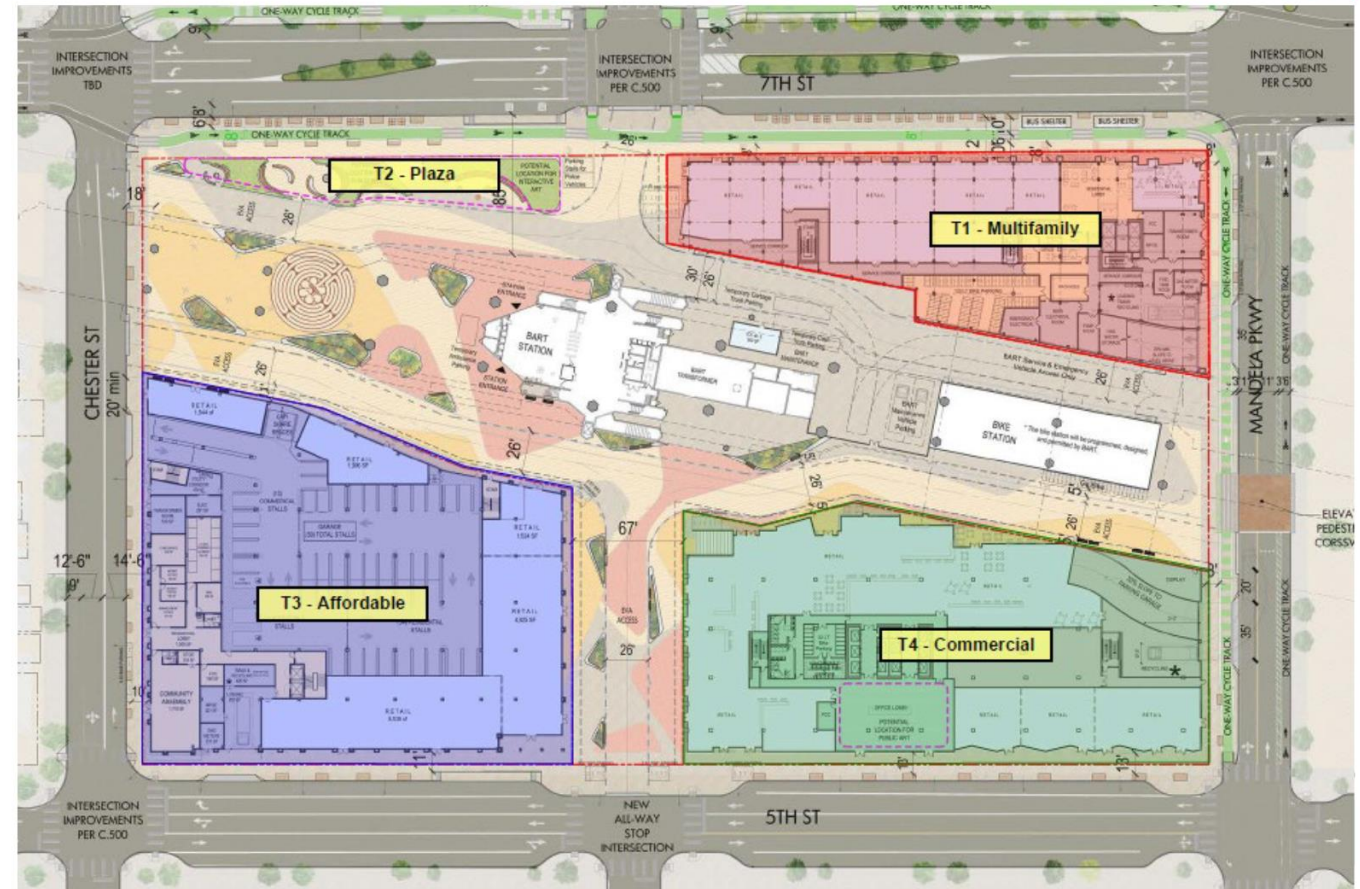
## Construction:

- **Lake Merritt Station- Building B and Paseo**

# Active Planning/Preconstruction: West Oakland Station

Developers: Mandela Station Partners

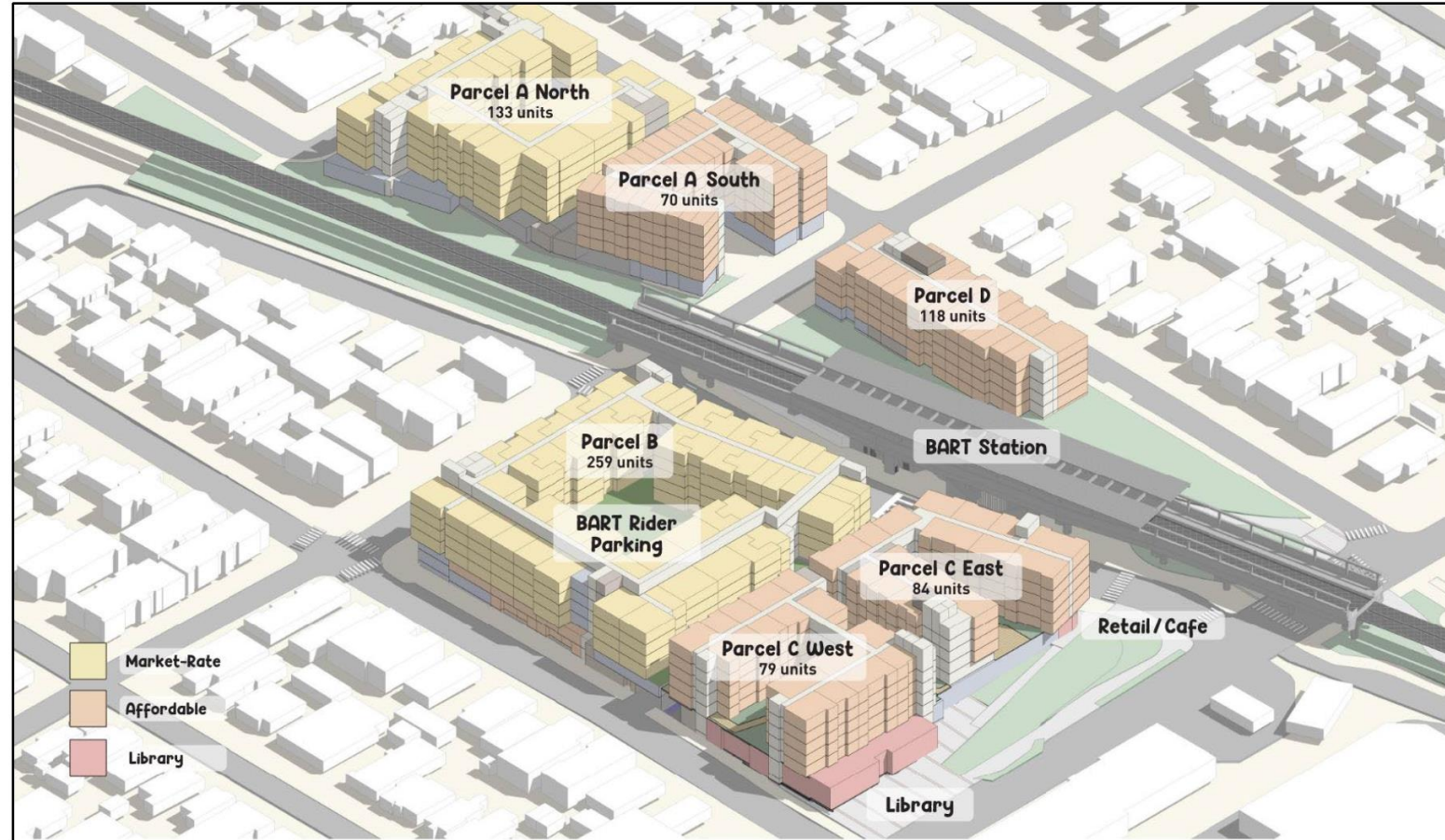
- 762 housing units, 240 affordable
  - 300K sq ft office, ground floor retail
  - Bike/ped access improvements
  - T3 slated to move first
- 
- ✓ Option signed May 2023
  - ✓ \$109.2M funding secured for affordable housing phase
  - ✓ \$29.8M secured for master project infrastructure



# Planning/Preconstruction: El Cerrito Plaza Station

Developers: Holliday Development, Related California

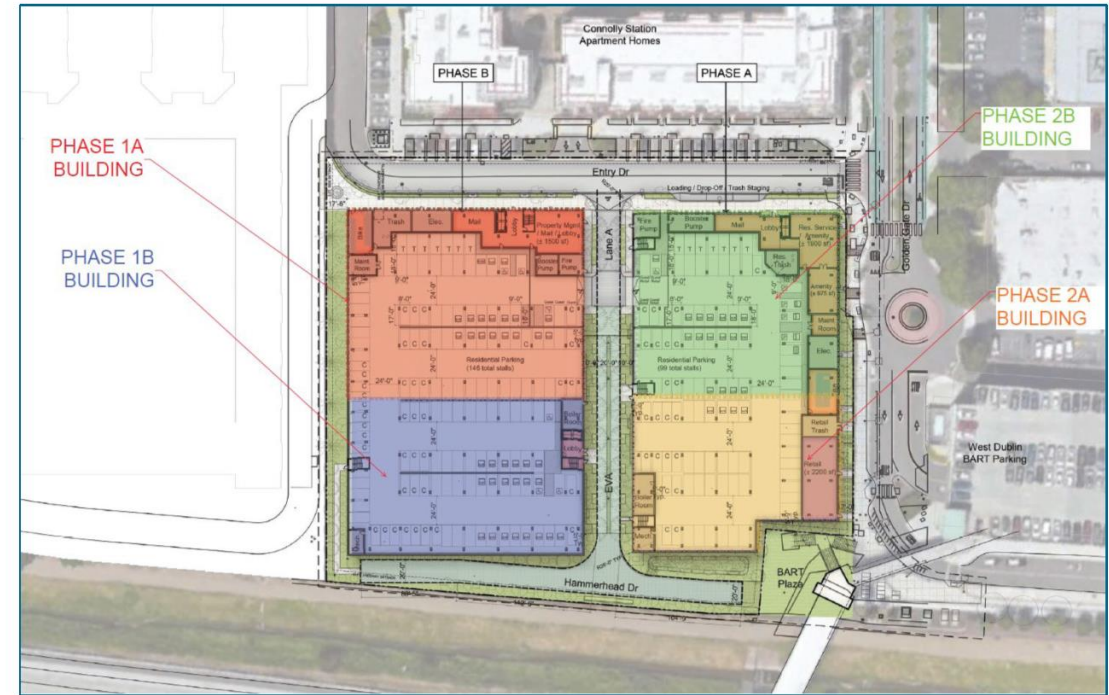
- 743 housing units, 47% affordable, including 118 units of 'missing middle income' housing
- Potential public library (pending local funding measure)
- Transportation infrastructure:
  - New intermodal
  - BART rider parking
  - Bike station
  - Widened Ohlone Greenway
  - Public plaza
- ✓ \$90M secured in housing and infrastructure funding
- ✓ July 2024: Master plan entitlements approved



# Planning/Pre-Construction: West Dublin/Pleasanton Station

Developer: Related California

- Final component of infill station and TOD development
  - 4 phases totaling 300 housing units
  - 100% affordable
  - BART Plaza
- 
- ✓ \$13.3M in City of Dublin funding commitments
  - ✓ Fully entitled





# Active Planning/Predevelopment: North Berkeley

Developer: North Berkeley Housing Partners (Avalon, Bridge, East Bay Asian Local Development Corporation [EBALDC], Insight Housing)

- ~740 housing units
- 52% affordable
  - \$26.2M City of Berkeley affordable housing contribution
- ~7,000 sq ft community-serving retail
  - On-site childcare
- Extension of Ohlone Greenway, other bike/ped improvements
- ~57,000 sq ft of open space
- ✓ December 2024: Master plan entitlements



Image courtesy of North Berkeley Housing Partners

# Active Planning & In Construction: Lake Merritt

Developers: Strada, East Bay Asian Local Development Corporation (EBALDC)

- Implementing community vision as set forth in Lake Merritt Station Area Plan
- ✓ Building B & Paseo in construction
- Building A timing depends on market

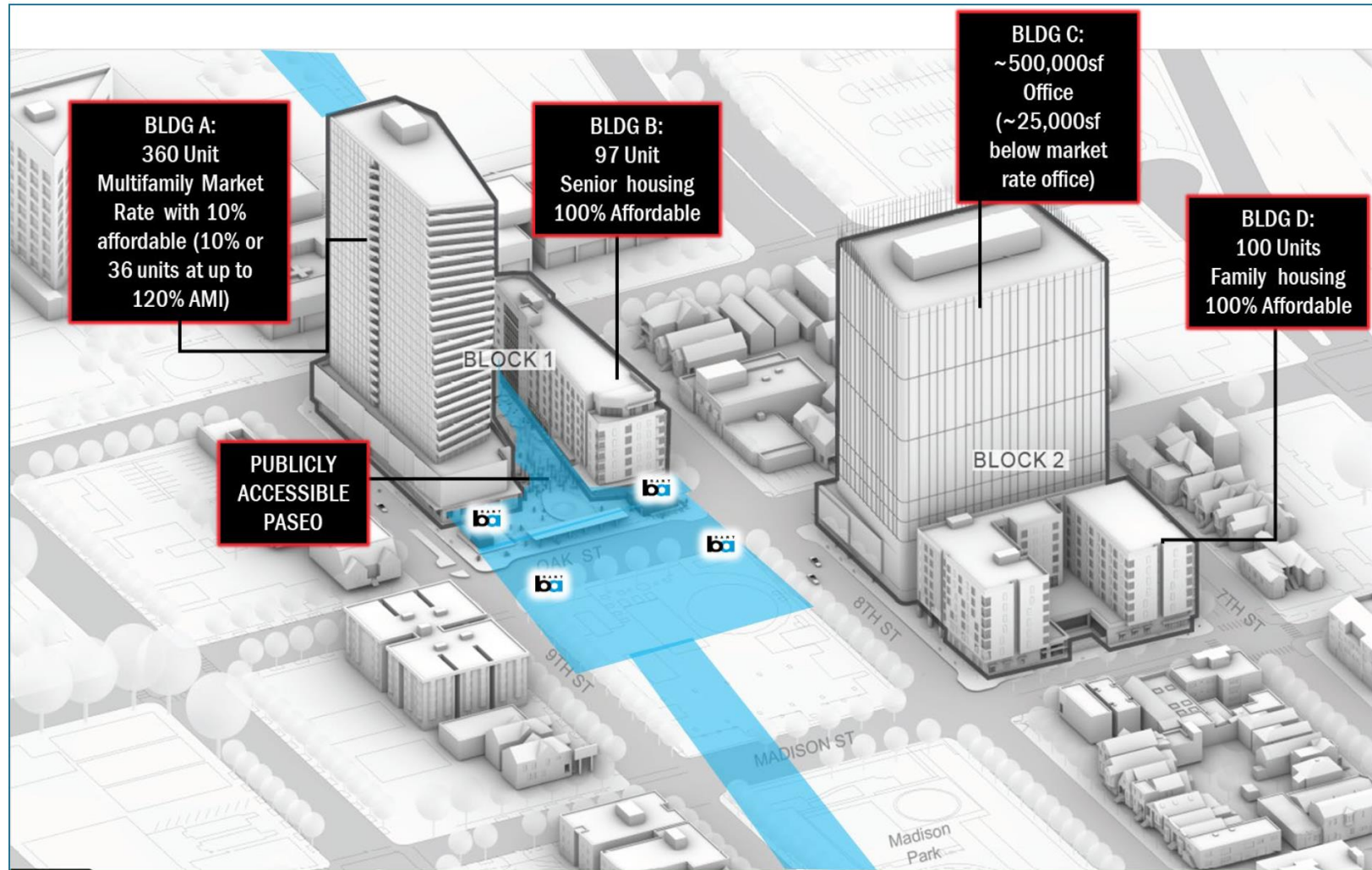


Image courtesy of Strada/EBALDC

# Solicitation

## Ashby

- ✓ BART/City Adopted Joint Vision & Priorities for TOD in 2022
- ✓ BART/City approved Term Sheet and executed Exchange Agreement in 2024
- ✓ BART issued RFP for West Lot Development Dec. 2024
  - 50% of first 602 units to be affordable
    - City contributing \$18.5M affordable housing funds
  - 5k ground floor retail for Flea Market and community uses
  - New BART plaza and access improvements
  - Proposals due March 2025
    - Recommendation to Board Summer 2025
- City to seek developer for East Lot Development



# TOD Work Plan (2024)

Developed in coordination with local and regional agencies.

Evaluation of future TOD sites, based on four criteria:

## 1. Local support

- Zoning, adopted community plans, public outreach
- Local interest in and funding for development
- Housing policies

## 2. Infrastructure readiness

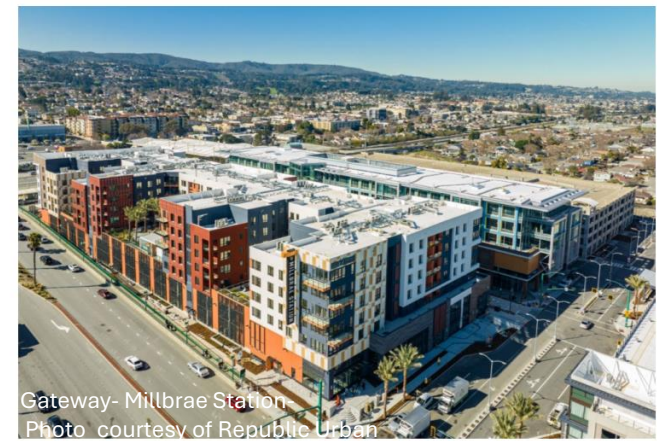
- BART rider parking, replacement parking on-site, off-site solutions
- Major utilities, flood channels, freight rail, etc.
- Access

## 3. Market readiness

- CoStar data
- Station access environment (WalkScore®, BART's Station Access Typology)

## 4. Development capacity (new)

- Considers development output / efficiency
- Developable acreage, density



# TOD Work Plan: Priorities

Timeframe to Advance to Developer Solicitation (RFQ/RFP): Alphabetical		
Near-Term (2024-2028)	Mid-Term (2029-2033)	Long-Term (2034 and beyond)
Ashby (Phase 2)	Coliseum (Phase 2)	Castro Valley (Phase 2)
Bay Fair	Concord (Phase 1-Monument)	Daly City (San Francisco & Daly City parcels)
El Cerrito del Norte	Dublin/ Pleasanton (Phase 2-Pleasanton)	Fruitvale (Phase 3-Derby)
Fremont	Lafayette	Glen Park
Hayward (Phase 2)	Pittsburg/ Bay Point	North Concord
	South Hayward (Phase 2)	Orinda <sup>1</sup>
	Union City	Pittsburg Center
	Warm Springs/ South Fremont	Rockridge
		South San Francisco

<sup>1</sup> Owned by Caltrans and operated by BART as parking

**Notes:**

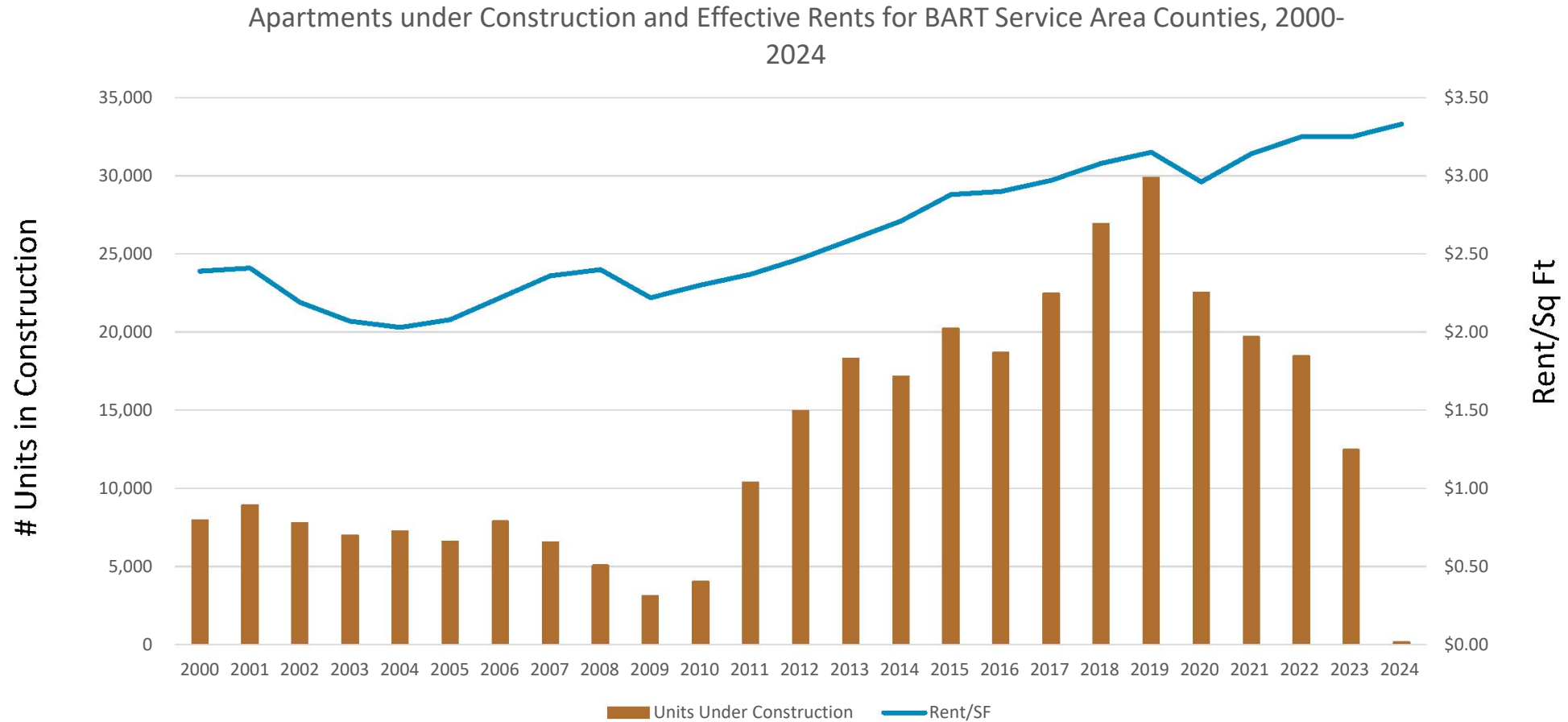
- 8 projects, not included here, have already gone through developer solicitation and are in predevelopment
- Sites that have not moved forward by the next TOD Work Plan update will be revisited

# BART TODs Leverage Funding for BART Capital Needs

- **\$113 million in AHSC funding for BART projects, including:**
  - \$72M for rail cars
  - \$21M for assorted station access and station modernization
  - \$13M for TPSS upgrades
  - \$7M for next generation fare gates
- **\$74 million in TIRCP funding for BART projects and TOD access, including:**
  - \$25.7M for BART rider parking at El Cerrito Plaza and North Berkeley TODs
  - \$21.3M for station access improvements at El Cerrito Plaza, North Berkeley, Lake Merritt, and West Oakland Stations
  - \$12.9M for Uninterruptable Power Supply Replacement at Lake Merritt Station
  - \$7M for plaza/paseo at Lake Merritt and North Berkeley TODs

# Apartment Construction At Low Cycle

Despite steadily rising rents, apartment construction has dropped off greatly since pandemic. CoStar reports just 181 apartments under construction in 2024, down from 2019 peak of ~30K.

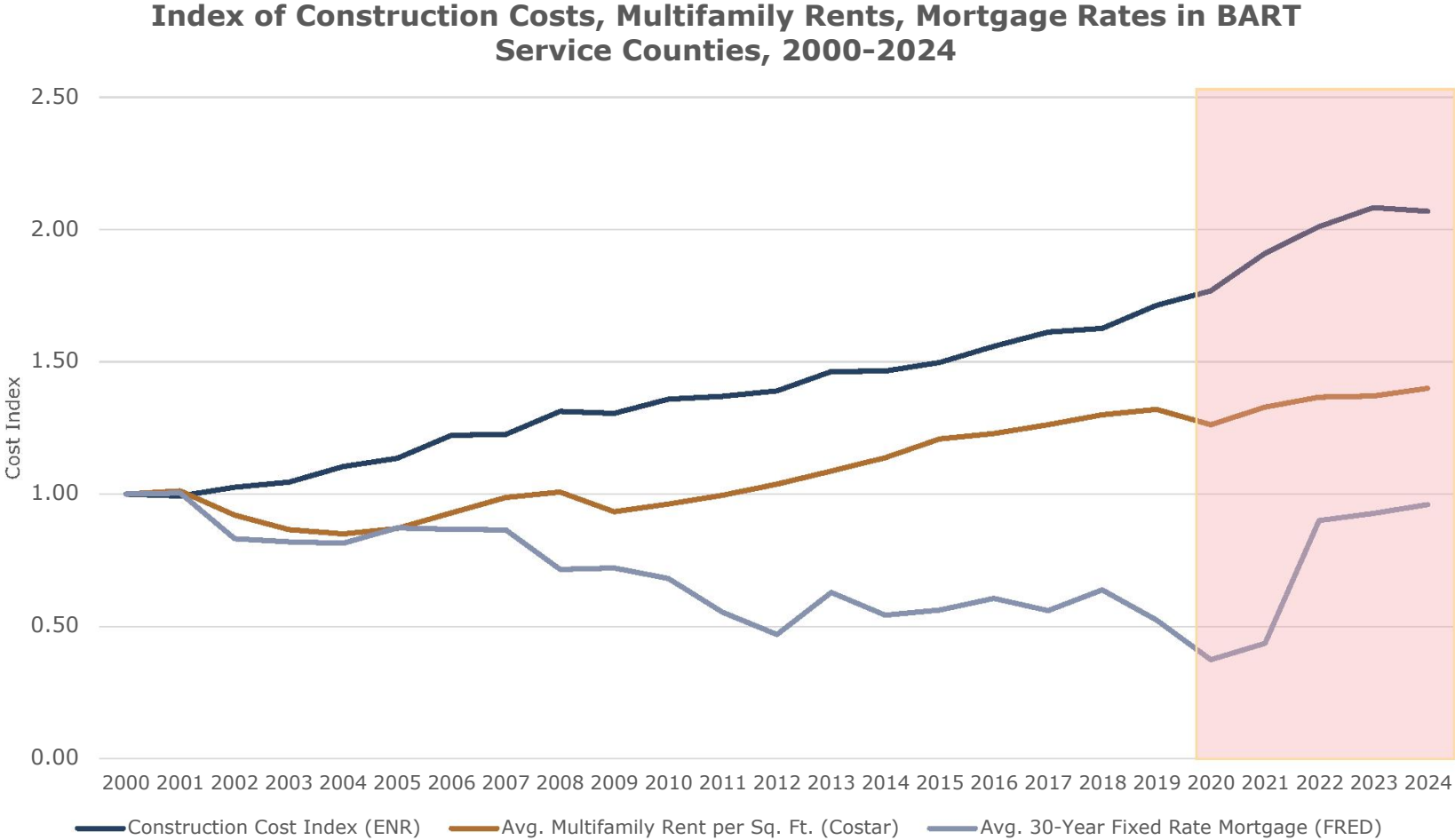


Source: CoStar; Analysis by Economic & Planning Systems



# Feasibility Challenge for Apartments

Construction costs have long escalated faster than rents, making new apartments less feasible to develop. Since pandemic, cost inflation and financing costs have spiked.

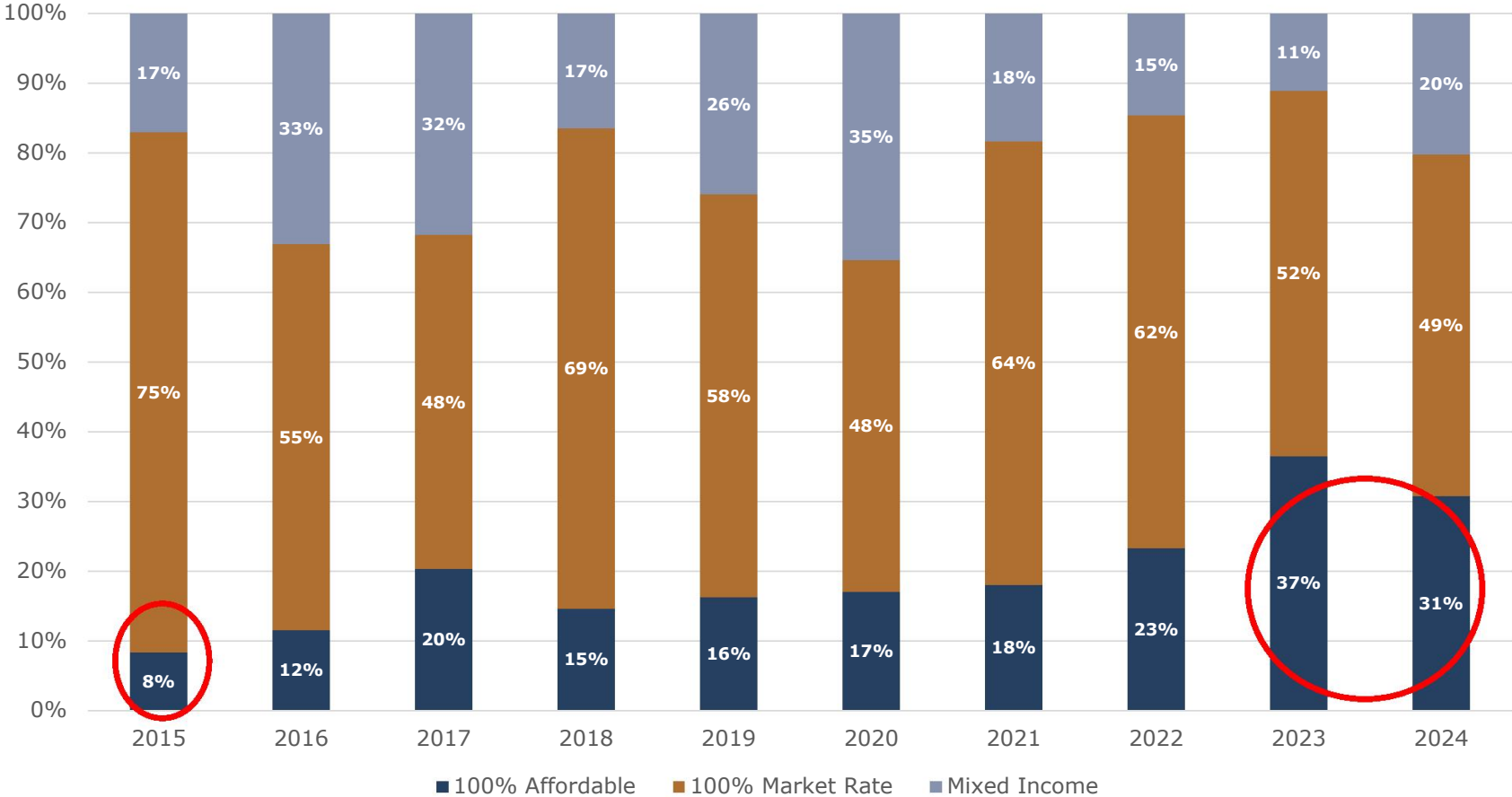




# Affordable Housing Increases Market Share

Due to aggressive funding for affordable housing and challenges for market-rate apartments, 100% Affordable projects represent a growing share of projects, representing roughly one-third of unit deliveries in 2023-2024 (up from 8 percent in 2015).

**Share of Multifamily Delivered Units in BART Service Counties by Affordability, 2015-2024**

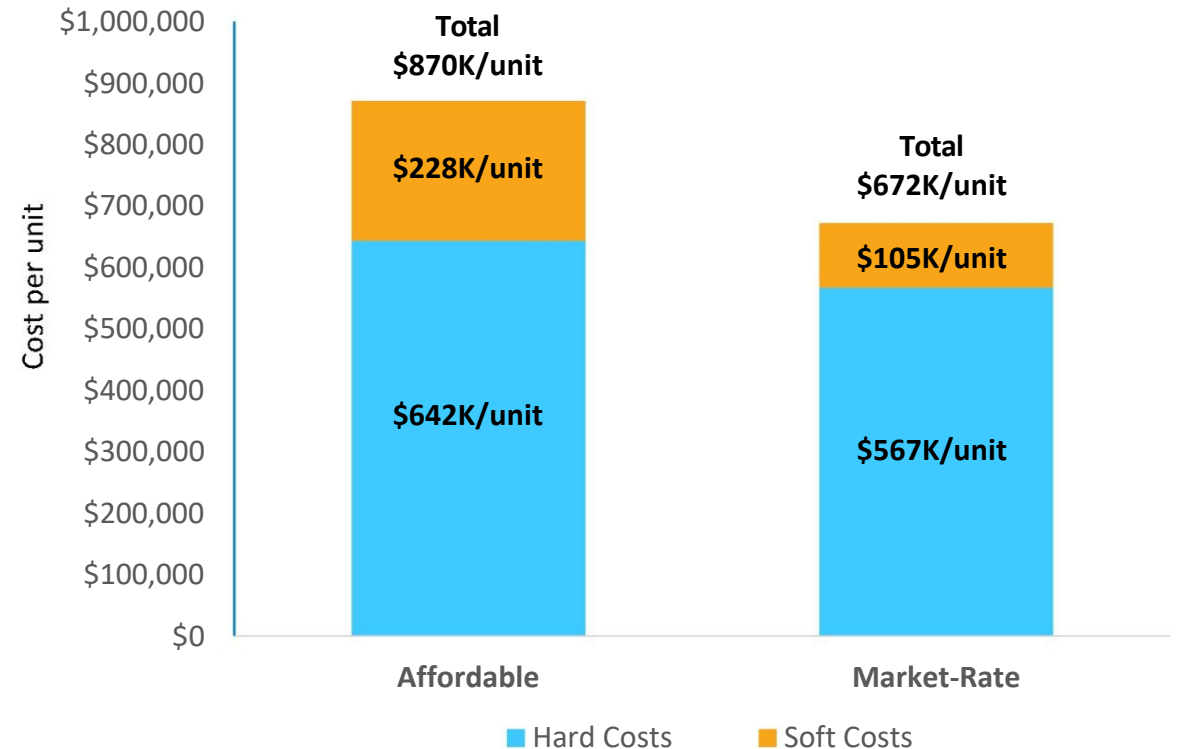


# Development Costs at BART TODs

## Affordable housing development costs often exceed market-rate development costs:

- Public subsidy/public land requirements result in:
  - Design requirements (e.g., green building, accessibility)
- Multiple funding sources mean:
  - Higher financing transaction costs (i.e., multiple transaction fees)
  - Higher land carrying costs
  - Higher project administrative costs to manage compliance with requirements of multiple public funding sources and public land ownership.

Example: Lake Merritt TOD (Phase 1)

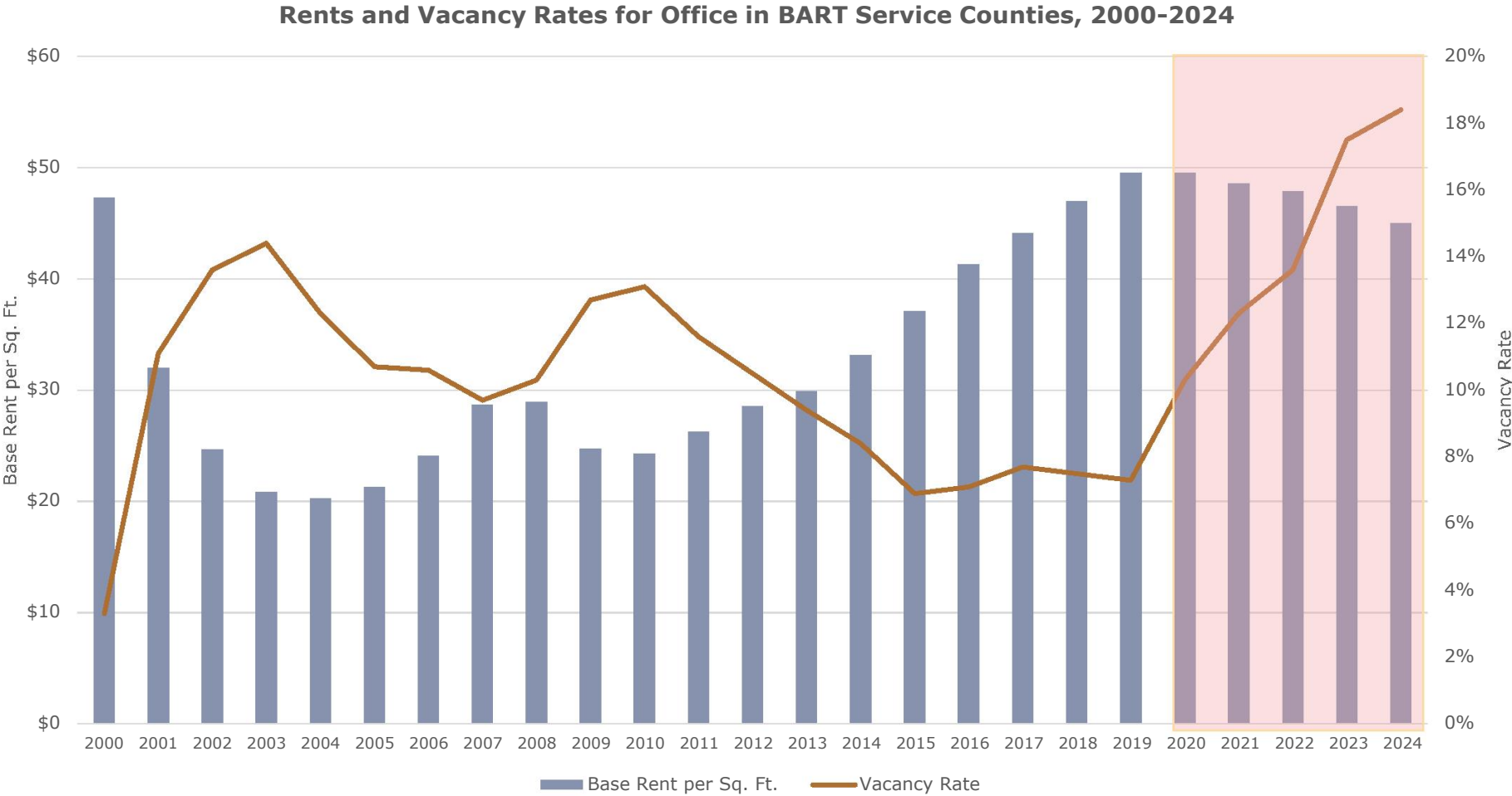


### Notes

- Costs based on 2023 project estimates.
- Hard costs include all construction-related costs.
- Soft costs include all non-construction-related costs (e.g., design, permitting, financing).
- Costs for all off-site and on-site access improvements included in the affordable project (responsibility of first phase).

# Recent Declining Demand for Office Space

After a decade of decreasing vacancies and rising rents, trends reversed in 2020. 5-County area now has 97 million Sq Ft of available office space.



\*Vacancy rate shown for 2000 to 2004. Availability rate shown for 2005 onwards. Source: CoStar; Analysis by Economic & Planning Systems



# Office Construction at Bottom of Cycle

New office construction spiked 2013-2020 but has declined greatly since the COVID-19 pandemic, with no clear expectation of recovery timeline.

**Under Construction (Sq. Ft.) for Office in BART Service Counties, 2000-2024**



Source: CoStar; Analysis by Economic & Planning Systems

# Managing Expectations

## Real estate market cycles are common and expected

- Previous charts show how construction ebbs and flows
- Boom-times often result from pent-up demand plus capital exuberance and availability, followed by periods of slow growth as new supply is absorbed

## Some specific current market conditions have no precedent

- “New normal” of office attendance not fully determined, even as job base grows and unemployment is low
- Housing remains in great demand, but construction costs remain too high for market-based rents
- Unknown impact of potential tariffs, federal funding changes, insurance markets, etc.

## Recovery is likely to be prolonged and location-specific

- Proven market areas likely to see investment before “pioneering” areas
- Transit-oriented sites have traditionally enjoyed market advantages
  - Historically, higher rents and lower vacancies than similar properties (Cervero, et al)
- Patience will be key for all involved – landowners, developers, cities, communities

## Good time to plan for next cycle

- Few projects likely to break ground soon, but can get sites ready: info on site conditions, entitlements, financing, etc. to prepare for future development

# 2024/25 Headlines

**'A perfect storm': California's housing crisis could worsen as construction slows**

**Why has housing construction slowed to a snail's pace in Oakland?**

**San Jose rolls out incentives to 'unblock' multi-family housing development pipeline**

Residential  
Development

**Office vacancy levels soar to record highs in biggest Bay Area markets**

**SF's office vacancies just hit a new all-time high. But the 'Great Reset' has begun**

**OpenAI expands new S.F. campus, signs another huge office lease nearby**

Office  
Development

# Upcoming Board Items

- **Spring 2025:** North Berkeley TOD Project Update, Negotiations Update
- **Summer 2025:** Ashby Developer Selection

~~kasheica.mckinney@bart.gov~~  
~~carli.paine@bart.gov~~

~~www.bart.gov/tod~~





**From:** [Jake Massler](#)  
**To:** [Heath Maddox](#)  
**Subject:** Fwd: Alternative Secure Bike Parking at MacArthur BART  
**Date:** Wednesday, March 19, 2025 11:09:42 AM

---

Hi Heath,

Just wanted to pass along the only feedback we got from the email blast about the bike station at MacArthur.

Best Regards,

Jake Massler  
*Senior Sales and Partners Manager*

eLock Technologies LLC  
800 Heinz Ave, Suite 11  
Berkeley CA 94710

P (510) 549-2853  
C (510) 847-4782

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----- Forwarded message -----

**From:** **BikeLink Support** <[support@bikelink.org](mailto:support@bikelink.org)>  
**Date:** Wed, Mar 19, 2025 at 7:55 AM  
**Subject:** Fwd: Alternative Secure Bike Parking at MacArthur BART  
**To:** Jake Massler <[jake@elocktech.com](mailto:jake@elocktech.com)>

Just FYI

--

BikeLink  
800 Heinz Ave, Suite 11  
Berkeley CA 94710

[www.BikeLink.org](http://www.BikeLink.org)

24hr support: (888) 540-0546

Office: (510) 239-7459



----- Forwarded message -----

From: **Brian Schumacher** [REDACTED]  
Date: Mon, Mar 17, 2025 at 2:06 PM  
Subject: Re: Alternative Secure Bike Parking at MacArthur BART  
To: BikeLink Support <[support@bikelink.org](mailto:support@bikelink.org)>

Hi Bikelink,

I appreciate the email about MacArthur Station. Unfortunately, given the large amount of property crime in Oakland, the shared Bike Station feels much less secure than the individual lockers. It's very easy for someone to sneak in when a valid bike link card holder enters/exits the station and then have the same access to your bike as they would if it were locked up on the street. The individual lockers with a chain to lock your bike to seem much more secure.

I tried to park my bike at MacArthur on a weekday morning just a couple of weeks ago and all of the lockers were in use. But I'd say that roughly half of them were either "abandoned" or were full of materials/belongings that were not bikes. Is there any way that you can keep the lockers cleared out so they can be used?

I really appreciate your service and use it anywhere from 3 to 7 days a week, but I was definitely disappointed about the state of the individual lockers at MacArthur and anxious about having to put my bike in the shared bike station.

Best,  
Brian

On Mon, Mar 17, 2025 at 1:28 PM BikeLink Support <[support@bikelink.org](mailto:support@bikelink.org)> wrote:

Dear BikeLink User,

We've noticed that the eLockers at MacArthur BART often fill up on weekdays, and we want to make sure you have a reliable place to park your bike!

If you arrive to find the lockers full, consider using the **MacArthur BART Bike Station**, which offers **BikeLink-controlled 24-hour self-park access**. This secure, shared-use facility is also a great option for **cargo bikes and oversized bicycles**, which may not fit in standard eLockers.

#### **How to Access BikeLink 24-Hour Controlled Parking:**

1. **Get a BikeLink Card or App** – Purchase a BikeLink card online, at any staffed Bike Station, or download the **BikeLink app**.
2. **BikeLink Card Users:** Register your card at [BikeLink.org](https://www.bikelink.org) to access all BikeLink facilities across California.

3. **Complete One-Time ID Verification** – Verify your ID for free in advance or instantly for \$5 at a BikeLink kiosk.
4. **Always Lock Your Bike** – These are unattended, shared-use facilities, so please secure your bicycle.

For more details on BART Bike Stations, visit: [BART Bike Stations](#)

For BikeLink eLocker information, visit: [www.bikelink.org](http://www.bikelink.org)

Thanks for riding, and happy parking!

--

BikeLink  
800 Heinz Ave, Suite 11  
Berkeley CA 94710

[www.BikeLink.org](http://www.BikeLink.org)

24hr support: (888) 540-0546

Office: (510) 239-7459



From: [BART Customer Service](#)  
To: [Eric White](#); [Heath Maddox](#)  
Subject: RE: Case 00353851: Scooters [ ref:!00Dd00hrYV.!500VI0QuzQ7:ref ]  
Date: Monday, February 10, 2025 12:46:15 PM

---

Hello Lt. White, Heath:

FYI as enforcement and/or rider education. Thank you.


Regards,

Samson Wong  
BART Customer Services

M-F 8am to 5pm

510-464-7134

=====  
Contact Name jes p

Contact Email 

Contact Phone

Opened Date/Time 2/9/2025 2:11 PM

Description People riding e-scooters within the station have a reckless disregard for the safety of anyone, including themselves. Powell is the worst station, with so many workers, all ignoring issues.  
ref:!00Dd00hrYV.!500VI0QuzQ7:ref

From: [BART Customer Services](#)  
To: [Heath Maddox](#); [Robert Franklin](#)  
Subject: RE: Case 00355501: Broken Bike Straps [ ref:!00Dd00hrYV.!500VI0SeRse:ref ]  
Date: Tuesday, March 4, 2025 1:00:29 PM

---

Hello,

Sharing customer correspondence below. I also shared this with the car cleaning managers. I am hoping their car cleaners can keep an eye out for broken straps and report them.

I spoke to the customer this morning. She appreciates all the signage to bikers, that there is an option to tie your bike in the car, and all attempts to make BART biker friendly. She added that the straps are too short. They need to be 1-1/2 feet longer so that more than 1 bike can be strapped in.

Regards,  
Lisa  
BART Customer Services

M-F 8am to 5pm

510-464-7134

=====

Contact Name Joan Sprinson

[REDACTED] 20 AM

Date/Time of Voicemail to CS: 3/3/25 @ 3:58pm:  
Frequently brings bike on BART.  
Relies on being able to secure it at "bike station" (on bike straps in car)  
Many of the straps are broken.  
What can be done so people are not having to hold bike up?  
She often has to ride for about an hour.

Date/Time of Callback to Customer: 3/3/25 @ 4:20pm:  
I left customer a voicemail. I asked that she provide a train car number the next time she notices a broken strap and then we can notify our train maintenance crew who can address it usually within 24 hours.

Date/Time of Customer's Callback Voicemail: 3/3/25 @ 4:59pm:  
She hopes BART can take a more proactive approach  
When staff is cleaning, they can let maintenance know when clasps are broken.  
This is an ongoing problem.  
She would have a full time job if she reported every broken strap she sees.  
Way more complicated than a broken clasps on the occasional car.



ref:!00Dd00hrYV.!500VI0SeRse:ref

From: [Heath Maddox](#)  
To: [Michael Forte](#); [Bart Webcustomerservices](#)  
Subject: RE: Case 00355691: SFO bart [ ref:!00Dd00hrYV.!500VI0SnVtp:ref ]  
Date: Friday, March 7, 2025 1:31:00 PM

---

It is hard to follow, but I think the passenger is saying that when they are at the end of the line and trying to transfer to a Millbrae-bound train, by the time they have unbuckled their bike from the lean bar on their initial train, the operator has closed the door and they are stuck on the first train and miss the transfer.

Sounds like they don't feel comfortable standing up and unbuckling the bike while the train is still moving, and if they wait until the train has stopped, it takes too long and they get trapped.

Can we ask the TO to wait 30 seconds or so to accommodate slower moving passengers before closing the doors?

-Heath

-----Original Message-----

From: Michael Forte <MFort@bart.gov>  
Sent: Friday, March 7, 2025 11:13 AM  
To: Bart Webcustomerservices <webcust@bart.gov>; Heath Maddox <hmaddox@bart.gov>  
Subject: RE: Case 00355691: SFO bart [ ref:!00Dd00hrYV.!500VI0SnVtp:ref ]

The question is a little difficult to follow, but it sounds like the patron arrives on one train, but doesn't get off for some reason, then sees the Millbrae train come in and out of the other platform?

But to answer the question, the train arrives at SFO, the doors open and passengers are to disembark. The TO has to change ends, a process which requires them to close the doors and key off. They then either walk to the other end of the train, (or a relief operator boards the outbound-facing end) keys on, and cycles the doors again before departing.

--Mike

-----Original Message-----

From: BART Customer Service <webcustomerservices@bart.gov>  
Sent: Friday, March 7, 2025 8:54 AM  
To: Michael Forte <MFort@bart.gov>; Heath Maddox <hmaddox@bart.gov>  
Subject: RE: Case 00355691: SFO bart [ ref:!00Dd00hrYV.!500VI0SnVtp:ref ]

Hello Mike, Heath:

FYI. Customer suggestion/question with a bicyclist point of view. Thank you.

Regards,

Samson Wong  
BART Customer Services

M-F 8am to 5pm

510-464-7134

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Contact Name Angel Diaz

Contact Email [REDACTED]

Contact Phone [REDACTED]

Opened Date/Time 3/5/2025 9:47 PM

Description Why don't the drivers just leave the bart doors open for us to transfer to Millbrae multiple times they've closed the door and I'm starting at the milbrae train take off making me late for work I have a bicycle with so I wait till we aren't moving to in buckle it  
ref:!00Dd00hrYV.!500VI0SnVtp:ref