

AC Transit Strategic Plan

April 10, 2019



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Introduction

Organizations of all types use strategic plans to keep themselves “on track” as they try to achieve their many goals. A strategic plan can be defined as a management tool that “is used to define an organization’s vision, mission, core values, challenges, and opportunities; establish long- and short-range goals; guide business processes; and measure performance. It helps an organization create its future rather than just react to it.”¹ A strategic plan makes an organization more **efficient** by directing its resources away from activities that aren’t essential to achieving its goals. It also makes an organization more **effective** by better delivering the product that it was designed to deliver. Strategic planning can help the Alameda-Contra Costa Transit District (also known as AC Transit or the District) concentrate its time and resources on those activities that are its primary focus. This is particularly important as new passenger transportation alternatives emerge and seek to take root. Transit’s competitors include “old” threats, such as cheaper car travel due to a long period of low gas prices. Competition can also arise from “new sources” like the changing mix of travel options—including bicycle sharing, scooters, and Transportation Network Companies (TNCs).

AC Transit first developed a strategic plan about twenty years ago. The principles of that plan were presented in many subsequent documents, including the Short-Range Transit Plan and the Strategic Vision published in 2002. However, over time, the Strategic Vision became too narrow, and the agency now faces new challenges not originally foreseen. The AC Transit Board of Directors therefore decided that a new Strategic Plan was needed to better reflect the agency’s current mission and objectives. That plan is summarized in this document; it is the result of an 18-month interactive effort between agency staff, Board members, and consultants. The details of its development are available in a separate Technical Appendix.

To guide the actions of AC Transit, the Strategic Plan must be able to change with changing circumstances. It should be considered by the agency’s staff and Board when making budget and routine day-to-day decisions. The Plan should be updated periodically to reflect current and anticipated conditions and to serve as a roadmap to help AC Transit shape the future.

¹ p.3, “Strategic Planning and Management in Transit Agencies” (Transit Cooperative Research Program, TCRP Synthesis 59), lead author Judson J. Lawrie, Washington, DC: Transportation Research Board, 2005

Background—AC Transit—The Same as and Different from Other Transit Agencies

AC Transit, like other transit agencies, must constantly meet the challenge of simply providing bus service. Our service operates 24 hours a day, 7 days a week, in a 364-square mile district. (If it were an incorporated city, the AC Transit district would be the third largest by area in California and the 9th largest nationwide). Our passengers depend on us for 169,000 trips every weekday.

AC Transit has an unusual set of demographical, historical, and financial characteristics. Organizationally, AC Transit is a standalone special district, not part of a city, county, regional, or state government. Most large American transit agencies focus on their region's primary downtown. AC Transit does serve Downtown San Francisco, but our service converges primarily on Downtown Oakland—the Bay Area's second largest downtown. AC Transit is the country's third largest bus-only transit agency. The District is also unusual in operating a transit bus system where another agency operates the transit rail system.

Transit agencies around the country face serious challenges, with many struggling to retain their current passengers. The "relevance" of metropolitan bus transit in a changing passenger transportation landscape is being questioned as never before. However, buses still carry almost two thirds (64%) of the transit trips in the US (exclusive of the New York

City subway). More people in the AC Transit district live within easy walking distance of frequent bus service than to the Bay Area Rapid Transit District trains (BART). Alongside rail service, bus service is an irreplaceable spine for the region's development.

The first decades of the 21st Century have been a time of great foment in transportation, with positive and negative consequences for transit. There have been periods of rising and falling ridership, with bus ridership falling in the last five years at most US transit agencies. A new bus service model, Bus Rapid Transit (and the "lite" version, Rapid Bus), has been successfully introduced in the US. In California, transit agencies are striving to transition to 100% "zero emission" bus fleets. TNCs such as Uber and Lyft have spent billions to develop technologies and business plans that directly compete with public transit, and to build market share by subsidizing rides in urban, transit-friendly neighborhoods.



The last few years have seen a resurgence of residential development in historically transit-oriented areas such as Downtown Oakland and Downtown Berkeley. A century ago, the inner East Bay had the Key System, one of the richest transit networks in the U.S., once described as “development-oriented transit.” Now a few new nodes of bus transit-oriented development, notably the Emeryville core and Alameda Point, are emerging. Some century old transit corridors, such as Broadway (Oakland), Telegraph Avenue, and San Pablo Avenue have also attracted new residential development. In addition, some East Bay cities have relaxed their parking requirements for new development, acknowledging the potential for more transit-focused travel patterns. Young people are delaying acquisition of driver licenses and orienting their lives more closely to transit-rich areas.

The Strategic Plan takes this physical and fiscal environment as background and draws on AC Transit planning documents that remain relevant. Examples include the Major Corridors Study, adopted in 2016, which provides approaches for long-term build-out of the District’s top East Bay corridors. The AC Go service expansion plan laid out a proposed frequent route network for the East Bay. The District is purchasing zero emission buses and evaluating the infrastructure needed to support a 100% zero emission fleet. The initial deployment of those buses is identified in the Clean Corridors Plan adopted by the District in 2017.



Our Multi-Agency Context—Advances Require Partners

Transit agencies, especially bus transit agencies, do not operate in a vacuum. We can only succeed if we can successfully collaborate with our partner agencies and companies.

Much of the AC Transit district’s geography was originally developed as transit-based, but billions of dollars of auto-oriented investments have reshaped the East Bay’s landscape. AC Transit plans, operates, and maintains a system of buses and support facilities. However, cities, counties, and Caltrans plan and manage almost all of the roadways we operate on. The decisions that cities make about prioritizing various modes of travel on their roads crucially shape AC Transit’s operations. The Eno Transportation Foundation notes that metropolitan transit planning nationally is disproportionately attentive to rail rather than bus transit.

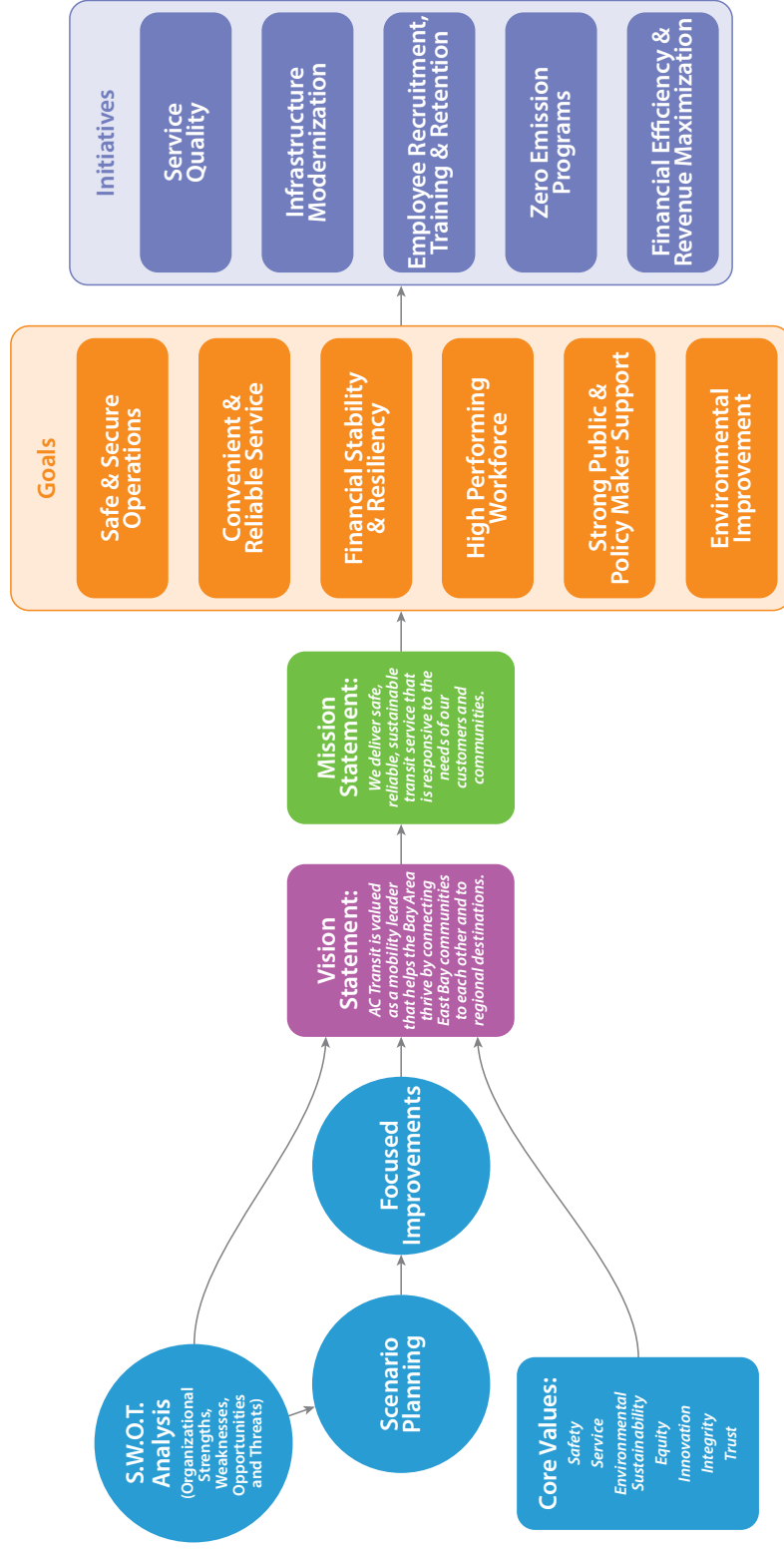
There is growing consensus within the transit industry that major bus routes need dedicated lanes to provide the fast, frequent, and reliable service that riders want. Locally, there is a strong desire to rationalize and simplify Bay Area transit fares, particularly for interagency trips. The electricity grid will need to be strengthened to handle the load from increasing numbers of electric buses and vehicles. These are all changes that AC Transit can propose and champion, but only achieve in partnership.



Components of Our Strategic Plan

Strategic plans consist of several elements, each of which focuses in more detail on how the organization should conduct its business. The current strategic planning process at AC Transit began early in 2017 with a S.W.O.T. analysis in which senior management and the Board of Directors outlined the Strengths, Weaknesses, Opportunities, and Threats (S.W.O.T.) facing the District. This was accompanied by consideration of our Core Values—the ideals we use to help guide our decision-making process and work. These two background components formed the basis for a consultant-led collaboration the following year. The consultant interviewed AC Transit Directors and senior staff about the role that AC Transit should play in the Bay Area. The consultant then conferred with staff to create scenarios describing alternative ways in which AC Transit could function over the next five to ten years. Once the Board of Directors settled on a favored scenario, the primary elements of the Strategic Plan were formed: a Vision Statement, Mission Statement, Goals, and eventually, Initiatives to organize the direction of the District’s work efforts. Staff also developed initial draft Objectives and metrics as precursors to the future development of Strategic Work Plans by each department in the District. The complete strategic planning process is explained in more detail in the Technical Appendix to this Strategic Plan. The separate components of the plan are summarized in the pages that follow and illustrated in Figure 1.

Figure 1
Components of the AC Transit Strategic Planning Process



Our Core Values

A strategic plan should reflect the core values of the people in the organization, including both staff and governance. **Core values** are the fundamental ideals that form the foundation of the work of an organization. AC Transit's core values, as defined in the 2017 workshops and then refined by the strategic planning team, consist of the following:

- **Safety:** We will plan and deliver bus service in ways that promote the health and safety of our customers, our employees, and the general public.
- **Service:** We are committed to a service structure that directs resources to rider groups with the greatest need and also offers the greatest opportunity to support car-free urban living in the Inner East Bay. We expect that the customer experience in using the system is safe, reliable, fast, clean, and pleasant.



- **Environmental Sustainability:** We will create a culture of environmental stewardship through the use of technologies, procedures, and policies that reduce the environmental impact of District operations and contribute to regional, state, and federal sustainability goals while supporting environmental justice in the communities most affected by the District's decisions.
- **Equity:** We believe that equity of access to mobility should be a factor in all agency decisions. This means balancing the needs of people who have special transportation challenges with the geographic coverage expected throughout the District as well as addressing the needs of under-represented populations.
- **Innovation:** We are open to adoption of new technologies, procedures, and practices to improve efficiency and effectiveness.
- **Integrity:** We always try to do the right thing and be honest and straightforward with each other and the public we serve.
- **Trust:** We respect our customers and colleagues and treat them as we want to be treated. We have confidence in each other's capabilities and intentions and believe that people work best when there is a foundation of trust.

These seven values form the principles that guide all the other elements of AC Transit's Strategic Plan.



Our Future Scenario – *Focused Improvements*

As mentioned above, interviews were held both with the management and Board of AC Transit to determine their ideas about the future direction of the agency. These ideas were then categorized into four scenarios that described alternative roles that AC Transit could play in the future (see the Technical Appendix for more detail). The scenario favored by the Board was termed *Focused Improvements*, in which agency resources are directed toward completing District-wide initiatives that put the agency on a positive trajectory. In some cases, it may be necessary to shift our focus toward strengthening line-haul bus service in major corridors and providing coverage service in lower-density areas, possibly through the District's Flex service. More collaboration with local communities would result in increased transit preferential treatment on city streets and better enforcement of curb space reserved for buses. The scenario also envisioned greater funding for Transbay bus service and better coordination between transit and land-use development. All of these accomplishments would ensure that the agency not only achieve its goals, but is recognized and valued for doing so.

The overall approach of this Strategic Plan is to focus bus transit resources on the services that AC Transit can provide best, the services which will continue to be needed by transit-dependent people, and the services that help East Bay cities meet their land use and environmental goals now and in the future.

Our Vision

A strategic plan's **Vision Statement** is a brief description of the future that broadly explains what an organization is trying to become. It describes a future condition in which the organization has achieved its objectives.

Based on the consensus around the Focused Improvements scenario, the following vision statement was adopted:

AC Transit is valued as a leader that helps the Bay Area thrive by connecting East Bay communities to each other and to regional destinations.


Our Mission

The **Mission Statement** of a strategic plan is a concise summary of the purpose of an organization and how it intends to realize its vision. It also helps everyone understand what would *not* be happening if the agency did not exist. The following mission statement confirms that AC Transit's main focus is on high-quality transit mobility:

We deliver safe, reliable, sustainable transit service that responds to the needs of our customers and communities.

Our Goals

Goals are broad statements of what an organization seeks to do in carrying out its mission. Six goals were identified by AC Transit's management and Board to guide the agency:

- **Safe and Secure Operations** – Safety and security are the foundations of AC Transit's operations. We cannot advance to the Focused Improvements future scenario unless safety is an integral part of our business. Customers and employees must feel safe in their persons, safe from traffic hazards, and safe from workplace risks.
 - **Convenient and Reliable Service** – Providing transit service that is both convenient and reliable is AC Transit's purpose. It is how most people judge our success or failure. If we do not provide quality bus service, customers will not rely on us, especially in today's environment of increasing transportation choices. To move up to the Focused Improvements scenario, we need to improve customer satisfaction through the reliability, speed, frequency, and amenities of our service.
 - **Financial Stability and Resiliency** – The District must have adequate funding to maintain existing service and to move the organization up to the Focused Improvements scenario. Our service—and all the supporting functions in the District—must be funded adequately to create convenient and reliable service. Resiliency in the face of financial change is crucial, as many of AC Transit's funding sources are volatile because of both the economy and the political environment.
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- **High-Performing Workforce** – Our high-performing workforce includes the people who provide quality service, monitor safe operation, assure financial stability, and advocate for transit-friendly legislation and regulation. The District needs a quality workforce to meet the challenges of providing bus transit in the East Bay and upgrading to a higher service level. Moreover, as one of the larger employers in the East Bay, AC Transit should ensure the enhancement of worker performance in our agency.
 - **Strong Public and Policymaker Support** – AC Transit is a public agency funded largely by tax dollars. As such, we need the ongoing support of the East Bay public and policymakers. This support is critical if we want to seek a new tax measure or other funding mechanism, which will be essential for realizing the Focused Improvements scenario. In addition, we operate on a road network managed by municipalities and other public agencies, so we require the cooperation of those public bodies to help us provide convenient and reliable service.

- **Environmental Improvement** – Public transit should contribute to the fight against climate change and other environmental degradation. AC Transit can provide a low-emission way for customers to travel. At the same time, we should continuously review our own operations for ways to reduce our environmental footprint. As the basis of transit-oriented development, we can help our communities live more environmentally-friendly lifestyles.

Our Strategic Initiatives

From Concept to Action, From “Hold Our Ground” to “Focused Improvements” – Five Strategic Plan Initiatives

The AC Transit Board of Directors chose the “Focused Improvements” scenario as the future state they would like the agency to be in. Under “Focused Improvements,” AC Transit will identify and improve the service that we do best and direct staff to launch District-wide initiatives to tackle many complex problems facing the agency. Yet it is clear that most District staff, understandably, view their work and priorities in terms more appropriate for the “Hold Our Ground,” scenario. That scenario would have sought simply to stay where we are as a transit provider, and not deteriorate further. A major challenge for the District is to pivot our direction, and identify and then implement actions which take the District beyond everyday struggles.

The Strategic Initiatives in this section are meant to create the bridge between the “Hold our Ground” present and the “Focused Improvements” future. They are interrelated, complex, multi-departmental activities. They are intended to be a group of big

actions, but by no means represent all of AC Transit’s important activities. Some of the initiatives focus on changing business practices, others on major construction and technological change, and others on public outreach. These Strategic Initiatives will affect all departments at AC Transit. To succeed, a core group of staff people within one or two departments will need to take the lead on each Strategic Initiative.

The Strategic Initiatives will be carried out while keeping core values such as equity and integrity at the forefront of our policies and actions.

The Strategic Initiatives are a focal point of the Strategic Plan and a mechanism for the District to achieve the goals highlighted in the plan. The Initiatives have the following features:

- Initiatives are organized collaborative activities to solve complicated, multifaceted problems
- Initiatives require multiple departments and individuals working as a team to succeed
- Each Initiative interacts with other initiatives, so that successes in one can help achieve success in some aspect of others



1 Initiative: Service Quality

This multi-part initiative seeks to improve the quality of AC Transit service as indicated by a variety of characteristics.

Service quality is the key issue for transit passengers. Surveys of transit passengers show that they seek convenience of access, frequency, reliability, short travel times, and comfortable rides. AC Transit meets some, but not all, of these criteria. We operate an extensive route network—especially in Northern Alameda County—allowing many passengers convenient walk access. Major lines operate relatively frequently—typically every 15 minutes or better during weekday daytimes. However, reliability has been poor—with on-time performance hovering around 70% with no recent improvement. Bus bunching is a regular occurrence. Travel speeds have been deteriorating, with the average bus now operating at 11 miles per hour—easily outrun by a car, train, or even a bike.

These problems have many sources and will require many responses, both inside and outside AC Transit. This Initiative is an opportunity to

review and revise our own traditional operational practices that may no longer be appropriate. Improvements to the operators' work experience of comfort and drivability can also be addressed under this initiative. Modernization of fare collection—including rear-door boarding on major lines and mobile ticketing—can reduce fare payment delay at the front door. The challenge of this Initiative is that it has so many elements. But this multi-faceted character of the Initiative also means that the District can make improvements on many fronts.

Goals Addressed:

- *Safe and Secure Operations*
- *Convenient and Reliable Service*
- *High-Performing Workforce*
- *Strong Public and Policy Maker Support*

2 Initiative: Infrastructure Modernization

This Initiative would rebuild or replace three operating Divisions (D2—Emeryville, D4—Oakland, D6—Hayward) to create efficient, state of the art, environmentally sustainable facilities.

Three of four of AC Transit's operating divisions date from 30 years ago or more. These divisions need to be completely renovated or replaced, to assure reliable ongoing operations, to create safer and more efficient facilities, and to reduce their environmental impact. Replacing each division will be a major capital project, with anticipated costs in the hundreds of millions of dollars per division. In certain instances, it might be preferable to move the Division rather than rebuild on its current site. The Divisions could not be completely rebuilt within existing sources of funding.





Goals Addressed:

- *Safe and Secure Operations*
- *Convenient and Reliable Service*
- *High-Performing Workforce*
- *Environmental Improvement*

3 Initiative: Employee Recruitment, Training and Retention

This Initiative would improve AC Transit's employee recruitment, training, career development, and retention practices, to ensure that we have adequate numbers of bus operators and other essential staff. A parallel objective is to help current and future employees adapt to changing technology.

Bus transit runs on the efforts of its employees. Some 70% of District operating cost is labor, mostly for operator wages. AC Transit is an agency with over 2,200 employees – it is critical to have enough people to drive and maintain the buses. AC Transit currently does not have adequate numbers of operators (drivers) and mechanics to run all of the service we have scheduled. The many other positions in the District ultimately support bus operations. Other transit agencies are also struggling with

the problem of recruiting and retaining employees, as they did at the height of the economic boom in the region over 20 years ago. The high cost of living in the East Bay and the Bay Area also exacerbates this problem, as District employees commute from greater distances. The District also needs to confirm that our hiring, training, and retention practices ensure that we recruit, reward, and retain the maximum number of quality employees. We have the advantage of being an employer committed to living wages in a time when that is increasingly rare.

Goals Addressed:

- *Convenient and Reliable Service*
- *High-Performing Workforce*

4 Initiative: Zero Emission Programs

This Initiative would begin AC Transit's implementation of the California Air Resources Board (CARB) mandate to make all California transit buses zero (at vehicle) emissions by 2040.

Buses last approximately 12 years, so 2040 would represent two full replacements of the AC Transit fleet. Under the CARB regulation, from 2029 forward, the District could only purchase zero emission buses. The District supports reducing emissions from transit buses as part of our environmental core value. The District has already purchased hydrogen fuel cell vehicles and has ordered 5 battery electric buses. To date, most transit agencies have purchased small numbers of electric buses. LA Metro has ordered 100 zero emission buses.

Moving to a zero emission fleet will require changes in multiple functions of the District. Bus Divisions will have to be retrofitted with bus charging infrastructure or hydrogen fueling capacity will have to be increased. Mechanics will

need to learn maintenance techniques for these buses. Operations will need to ensure that bus routes match the range of charge or fueling of particular buses.

Goals Addressed:

- *Environmental Improvement*
- *Strong Public and Policy Maker Support*
- *High-Performing Workforce*

5 Initiative: Financial Efficiency and Revenue Maximization

This Initiative would simultaneously work to develop more cost-effective work processes and operations practices and create a long-term, stable source of funding for AC Transit. Securing additional funding would almost certainly need voter approval.

Before the District can ask the voters for additional funding, it is critical that measures be taken to increase efficiency at every level of operations and administration. Our own house must be in order before we enjoin the voters to tax themselves. This may require making strides on regionally recognized performance measures identified in MTC's Transit Sustainability Project such as decreasing our cost per boarding or cost per revenue hour.

Stable sources of funds are important to AC Transit. Fares cover only 17% of our operating costs, and this percentage has been declining. The District has been successful in gaining funding through voter-passed tax measures sponsored by other agencies. These include Measure BB (Alameda County Transportation Commission) and Regional Measure 3 (MTC). However, much of AC Transit's funding comes



from sales taxes, which can rise and fall dramatically during economic cycles. Some funding sources are only available in parts of our district and/or for certain purposes. Measure BB half cent sales tax passed by the voters in Alameda County in 2014 with a significant amount of operating and capital funding for AC Transit is not applicable in Contra Costa County. AC Transit's own Measure C1, passed in 2016, is a special parcel tax with revenues dedicated to the District but not applicable to Fremont and Newark, also known as Special District Two.

Seeking a new funding source will almost certainly require a vote of the people in the AC Transit district. Currently, most such measures would require a 2/3 affirmative vote. Passing such a measure would require a major financial analysis and planning process, and a campaign effort independent of the District. The type of funding for this initiative—tax, bond, or other—has not yet been identified.

Goals Addressed:

- *Financial Stability and Resiliency*
- *Strong Public and Policy Maker Support*

Measuring Our Progress and Next Steps

AC Transit's Strategic Plan must be a living document. It should be updated periodically on a specific schedule, set in advance by the Board, to reflect new conditions and challenges faced by the District. It should also be detailed with actions needed to achieve the Plan's goals, Strategic Initiatives and objectives. The next phase of the Strategic Plan will be for each department to align itself and its work with the goals and Strategic Initiatives, finalize objectives and metrics into a Strategic Work Plan and of course, execute. In order to execute effectively and efficiently, staff envisions the development of teams to align ourselves to accomplish each of the Strategic Initiatives.

To determine if the goals are being met and initiatives are progressing, senior staff has developed draft objectives and metrics (available in the Technical Appendix). Each objective and corresponding metric describes an action and, in the case of each metric, a standard for determining if, or by how much, a particular objective is being realized. In many cases, several metrics are needed to gauge the accomplishment of a single objective. Specific metrics or combinations of metrics will be further developed to measure the progress in meeting objectives to accomplish the Strategic Initiatives. To be effective, each metric should have a specified timeframe for progress or completion and a specified staff member responsible for guiding it. While timeframes and staff may be modified as needed, there will still be clear lines of responsibility for the oversight of the actions.

Progress on the initiatives and metrics themselves should be reviewed by the Board periodically. To ensure that the agency reviews and considers potential changes to the Strategic Plan on a regular basis, the Board should direct staff when to undertake this process. As an example, the agency could review the Strategic Plan annually in conjunction with the budget process, and the Board could approve changes at the same time as it approves the agency's budget. Alternatively, if the timing is better, the Board could request that staff review the Strategic Plan and bring it to the Board for approval semiannually. Measurement and regular reporting will help ensure that the staff remains accountable. Without this critical aspect, the Strategic Plan can easily devolve into another document that sits on a shelf, occasionally referred to, but not truly a guide to action.

Staff at all levels should use the Strategic Plan to guide decision making. This is true of both the transformative decisions involving great sums of money and the participation of multiple departments and the routine decisions made every day. Placards with AC Transit's adopted Vision and Mission statements could be posted throughout the District's facilities to remind employees at all levels of the big picture they are working toward. Although exceptions to the Plan may have to be made on occasion, these exceptions should always be discussed and debated instead of accepted routinely. In this way, the Strategic Plan will do what it was designed to do, guiding the District along a path to its desired future role in the region.

Schedule

The following schedule is the path toward completion of the first phase of the Strategic Plan, which focuses on the mechanisms to implement the plan. During this 6-month phase, staff would create the structure of accountability for implementing the plan. This work includes hiring or assigning a designated Strategic Plan Coordinator; creating teams to implement the Strategic Initiatives; clarifying metrics and; establishing a regularly occurring report to the Board on progress.

The second phase of the plan will have a longer time horizon and will focus on carrying out the Strategic Initiatives. The semiannual reporting to the Board would continue but would focus on the specific progress of the initiatives.

Conclusion

This Strategic Plan document represents a conclusion to the 18-month effort taken to create it, but it also launches the initiation of a new approach for doing business at AC Transit. This new approach will take time and energy to be fully embraced by both the Board of Directors and staff. Nonetheless, it offers the chance for the District to meet the transportation challenges of the coming years in a focused and cost-effective way. Strategic planning will help every employee consider the outcomes of the work they are doing and whether that work could be modified to better align with the District's goals and objectives. It also allows Board and management to measure progress and change course when necessary. Harkening back to the introduction to this document, it will help AC Transit create its future rather than just react to it.

Date	Action
April 2019	Board of Directors Approves Plan
May 2019	Budget Identified for a Strategic Plan Coordinator beginning in FY 2019/2020
May 2019	Develop Job Specifications and Draft Work Plan for Strategic Plan Coordinator
July 2019	Hire/Assign Strategic Plan Coordinator
October 2019	Roll-out Strategic Plan Implementation
October 2019	Finalize Working Groups for each Strategic Initiative
November 2019	Document Strategic Initiative KPIs
November 2019	Develop and Refine Objectives and Metrics
January 2020	Develop annual work plans
January 2020	Report to the board semiannually on progress



Our Mission

We deliver safe, reliable, sustainable transit service that responds to the needs of our customers and communities.

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