

Triennial Performance Audit
of the
Bay Area Rapid Transit District
(BART)

Fiscal Years 2022/23, 2023/24 and 2024/25

FINAL AUDIT REPORT

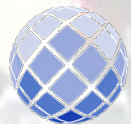


prepared for the



**METROPOLITAN
TRANSPORTATION
COMMISSION**

by



Pierlott & Associates, LLC
Management Consulting

June 2026

NOTE: All exhibits in this report are presented at the end of the associated discussion in each section.

EXECUTIVE SUMMARY

This executive summary highlights the findings from the performance audit of the San Francisco Bay Area Rapid Transit District (BART). In California, a performance audit must be conducted every three years of any transit operator receiving Transportation Development Act (TDA) Article 4 funds, to determine whether the operator is in compliance with certain statutory and regulatory requirements, and to assess the efficiency and effectiveness of the operator's services. BART operates a rapid rail system, which extends primarily into three member counties (Alameda, Contra Costa, and San Francisco), along with parts of San Mateo County and Santa Clara County. BART also operates an automated people mover service between the BART Coliseum Station and Oakland International Airport, and the BART-to-Antioch diesel multiple unit branch line in eastern Contra Costa County. The audit period is Fiscal Years 2023 through 2025 (from July 1, 2022 through June 30, 2025).

Performance Audit and Report Organization

The performance audit was conducted for MTC in accordance with its established procedures for performance audits. The final audit report consists of these sections:

- An assessment of data collection and reporting procedures;
- A review of performance trends in TDA-mandated indicators and component costs;
- A review of compliance with selected PUC requirements;
- An evaluation of BART's actions to implement the recommendations from the last performance audit;
- An evaluation of functional performance indicator trends; and
- Findings, conclusions, and recommendations to further improve BART's performance based on the results of the previous sections.

Comments received from BART and MTC staff regarding the draft report have been incorporated into the final report. Highlights of the key activities are presented in this executive summary.

Results and Conclusions

Data Collection – Based on the information provided, BART is in compliance with the data collection and reporting requirements for all five TDA statistics. In addition, the statistics collected over the six-year review period appear to be consistent with the TDA definitions, and despite a few noted exceptions indicate consistency in terms of the direction and magnitude of the year-to-year changes across the statistics, especially when taking into account the impacts of the recent COVID-19 pandemic on service provision and ridership.

TDA Performance Trends – BART’s performance trends for the five TDA-mandated indicators were analyzed by mode. A six-year analysis period was used for all the indicators. In addition, component operating costs were analyzed for the six-year period.

- Heavy Rail TDA Performance Indicators – The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 4.5 percent, or 0.7 percent in inflation adjusted dollars. There were increases in every year except FY2022. The largest annual increase was in FY2024 (32.6 percent).
 - Passenger productivity showed a notable decline, with passengers per vehicle service hour and mile decreasing by ten and eight percent per year overall, respectively. These trends were most significantly impacted by a major ridership decline in FY2021, the first full year of the COVID pandemic.

- The cost per passenger increased on average by 16.1 percent per year, which, when measured in constant FY2020 dollars, was still an increase of nearly 12 percent. This trend was also most significantly impacted by the major ridership decline in FY2021.
- For employee productivity, car service hours per employee decreased by 2.6 percent on average per year, though there were notably higher results in FY2022 and FY2023. The trend was significantly influenced by post-COVID response service restoration in Fall 2021, and major schedule changes in Fall 2023.
- Heavy Rail Component Costs – The following is a brief summary of the component operating costs trend highlights for the heavy rail service between FY2020 and FY2025:
 - The most significant change was a 23.3 percent average annual increase in casualty/liability costs, though these costs represented only a small portion of total costs.
 - Labor costs went up by 6.1 percent per year on average, and were the largest portion of total costs in all years, at nearly 50 percent.
 - Fringe benefits costs comprised the second largest cost category. They increased on average by 5.8 percent annually, while remaining between 25 and 30 percent of total costs.
 - Services, materials/supplies and utilities costs each accounted for less than ten percent of total costs, and posted average annual increases of about five percent.
- Automated People Mover TDA Performance Indicators – The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 1.8 percent, which amounted to a decrease of 1.9 percent in inflation adjusted dollars. Service hours were almost even in FY2020 and FY2025 while corresponding operating costs increased by 2.4 percent.
 - Passenger productivity showed overall decline, with passengers per vehicle service hour and mile decreasing by 7.5 percent and 1.8 percent per year on average. These trends reflect an 80 percent reduction in passengers in the

first full year of the pandemic (FY2021), but substantial rebounding subsequently.

- The cost per passenger increased on average by 10.1 percent per year, which when measured in constant FY2020 dollars, resulted in an average annual increase of 6.1 percent. This trend was also significantly impacted by the major ridership decline in FY2021, and rebounding starting in FY2022.
- Automated People Mover Component Costs – The following is a brief summary of the component operating costs trend highlights for automated people mover service between FY2020 and FY2025:
 - The most significant change was an average annual increase of more than 50 percent in the materials/supplies area, though the dollar amounts involved were minimal.
 - In-house labor costs decreased by 8.3 percent per year, while fringe benefits costs decreased by 12.3 percent. Each category contributed no more than three percent of total operating costs.
 - Utilities costs remained between ten and 12 percent of total costs, while casualty/liability costs were consistently around one percent.
 - Purchased transportation was the largest component of total operating costs for this contracted service, at 83 to 86 percent. Purchased transportation costs increased approximately 2.4 percent per year.
- Hybrid Rail TDA Performance Indicators – The following is a brief summary of the hybrid rail TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 8.3 percent, or 4.4 percent in inflation adjusted dollars. After FY2021, there were major increases in the next two years, followed by relatively small changes in FY2024 and FY2025.
 - Passenger productivity showed notable decline, with passengers per car service hour decreasing by 5.6 percent per year overall, and passengers per car service mile by nearly four percent. These trends were driven by major decreases in passengers in FY2021, the first full year of the COVID pandemic, but substantial rebounding subsequently.

- The cost per passenger increased on average by 14.7 percent per year, which, when measured in constant FY2020 dollars, resulted in an average annual increase of nearly 11 percent. This trend was significantly impacted by COVID related ridership declines in FY2021. Subsequently, the cost per passenger leveled out in a range of \$16 to \$18.
- Employee productivity decreased on average by five percent per year. Higher employee productivity was recorded in FY2020 and FY2021, when the impact of the COVID pandemic was most pronounced.
- Hybrid Rail Component Costs – The following is a brief summary of the component operating costs trend highlights for hybrid rail service between FY2020 and FY2025:
 - Labor costs contributed just under half of total operating costs, and fringe benefits costs another third. Both increased on average per year, by 8.3 percent and 11.4 percent.
 - Services costs decreased slightly overall, with the share of total costs dropping to less than three percent in the last three years. At the same time, materials/supplies costs went up by 12.4 percent, and the share of total costs increased to about 19 percent.
 - Utilities and casualty/liability costs together consistently accounted for just two percent or less of total costs. In addition, “other expenses” increased by 48.7 percent per year, but constituted well under one percent of total costs.

Compliance with Statutory Requirements – BART is in compliance with the applicable sections of the state PUC that were reviewed as part of this performance audit. The sections reviewed included requirements concerning labor contracts, reduced fares, Welfare-to-Work, revenue sharing, and evaluation of passenger needs.

Status of Prior Audit Recommendations – There were no recommendations made in BART’s prior performance audit.

Functional Performance Indicator Trends – To further assess BART’s performance over the past three years, a detailed set of systemwide and modal functional area performance indicators was defined and reviewed.

- Systemwide (All Modes) – The following is a brief summary of the systemwide functional trend highlights between FY2023 and FY2025:
 - Administrative costs compared to total costs increased by ten percent, and compared to car service hours by nearly 60 percent.
 - Marketing costs decreased somewhat compared to both total administrative costs and passenger trips.
 - The systemwide farebox recovery ratio increased from 24 percent to more than 26 percent.
- Heavy Rail Service – The following is a brief summary of the heavy rail service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile remained in a range of \$1.12 to \$1.15, while the portion of car miles and hours in service remained at about 97 percent through the period.
 - For operations, the vehicle operations cost per total operating cost decreased but remained near 40 percent, while vehicle operations costs per car service hour increased noticeably from \$1.18 to \$1.61, but the farebox recovery ratio increased from 24 percent to more than 26 percent. Operator scheduled absences remained at about 15 percent of total hours worked, while unscheduled absences decreased from 19.6 to 13.7 percent. Schedule adherence was just 70 percent or somewhat higher, but BART provided evidence of significant improvement through various operational initiatives to 84.2 percent in FY2026 (after the audit period). Meanwhile, the rate of complaints decreased by 20 percent in the last year, and about four percent of total trips were missed in the first year, down to one percent thereafter.
 - In the maintenance area, maintenance costs per total operating costs remained steady at 33 percent, while vehicle maintenance costs per service mile increased overall by 40 percent. Maintenance pay hours rose from 60 to 70 percent of car service hours by FY2025. Maintenance employee

scheduled absences decreased steadily to 18 percent of total hours, while unscheduled absences remained at about ten percent. The vehicle spare ratio varied from 25 percent in FY2024 to over 50 percent in FY2025. The mean distance between major failures improved overall, especially by 80 percent between FY2023 and FY2024, and this trend was even more pronounced for all failures.

- In the safety area, the rate of preventable accidents per 100,000 miles increased by 27 percent overall. At the same time, casualty and liability costs per car service hour and mile increased by 140 percent in FY2024 but were then reduced by 17 percent in FY2025. Lost days due to industrial accidents decreased by 32.5 percent over the period.
- Automated People Mover Service – The following is a brief summary of the automated people mover service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile increased by 15 percent to \$6.87 in FY2025. Meanwhile, 99 percent of vehicle miles and hours were consistently in service.
 - For operations, the vehicle operations cost per total operating cost increased 29 to 31 percent in FY2025, while vehicle operations costs per car service hour increased by 14 percent overall. The farebox recovery ratio decreased from 34.4 percent in FY2023 to about 31 percent subsequently. Cumulative and passenger service availability both remained at more than 99 percent, while the rate of complaints decreased by 27 percent in FY2024 but subsequently returned almost to the FY2023 level.
 - In the maintenance area, maintenance costs remained between 43 and 45 percent of total operating costs, while vehicle maintenance costs per car service mile increased by 14 percent. The vehicle spare ratio remained at 50 percent, but the mean distance between major failures worsened significantly in each year. At the same time, the mean distance between all failures was down by 83 percent in FY2024, though there was some improvement in FY2025.
 - For safety, no preventable accidents were recorded in any year, and casualty/liability costs per car service hour and mile both showed only very minor changes overall.

- Hybrid Rail Service – The following is a brief summary of BART’s hybrid rail service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile increased in each year, by 19 percent overall. Meanwhile, about 99 percent of all car miles and hours were in service throughout the audit period.
 - For operations, vehicle operations costs per total operating cost decreased modestly to 45.8 percent in FY2025, and vehicle operations costs per car service hour decreased modestly as well, down to \$258 by FY2025. The farebox recovery ratio also decreased through the period, from 18.8 percent in FY2023 to 16.4 percent in FY2025. Operator scheduled absences increased overall from seven to 12 percent of total hours worked, while unscheduled absences increased from 14 to 17 percent. Schedule adherence remained at about 98 percent of trips, but the rate of passenger complaints increased from year to year, rising by 14 percent overall. The incidence of missed trips was consistently very low, well under one percent of total trips.
 - In the maintenance area, maintenance costs per total operating costs increased overall from 49 percent to 52 percent, while vehicle maintenance costs per service mile increased by 46 percent and maintenance pay hours per car service hours remained in a range of 146 to 150 percent. Maintenance employee scheduled absences decreased steadily to 20.1 percent of total hours worked in FY2025, while unscheduled absences amounted to seven percent in both FY2023 and FY2025. The vehicle spare ratio was steady at 12.5 percent. The mean distance between major failures worsened overall by 21 percent, but for all failures there were more steady results.
 - In the safety area, the rate of preventable accidents reflects a single accident in FY2023 and FY2024, and none in FY2025. Casualty and liability costs per car service hour and mile were down by 60 percent and 48 percent overall, respectively. There was an 18 percent increase in lost days due to industrial accidents reported in FY2024 compared to FY2023, but no such lost days reported in FY2025.

Recommendations

1. TAKE STEPS TO REDUCE PREVENTABLE ACCIDENTS ON BART'S HEAVY RAIL SERVICE.

[Reference Section: VI. Functional Performance Indicator Trends]

Recent increases in the rates of preventable accidents on BART's heavy rail services point to a potentially burgeoning safety issue which BART should continue to address. There were more than 500 separate incidences reported in each audit year, and the rate of preventable accidents increased steadily, rising from 0.65 per 100,000 miles traveled in the first year to 0.83 in FY2025 (27 percent). BART reports that it has recently taken several proactive measures to improve both employee and patron safety throughout the system. Continuing efforts should include additional strategies to improve operator training and enhance monitoring activities to ensure that safety issues are identified and corrected before they have a chance to escalate further.

2. EXAMINE MAINTENANCE ACTIVITIES AND DEVELOP STRATEGIES TO ADDRESS INCREASING MECHANICAL FAILURE RATES ON BART'S AUTOMATED PEOPLE MOVER SERVICE.

[Reference Section: VI. Functional Performance Indicator Trends]

Maintenance results for BART's automated people mover service showed service reliability generally declining over the audit period. The mean distance between major failures worsened significantly in each year, while at the same time, the mean distance between all failures was down by 83 percent in FY2024, though there was some improvement in FY2025. Expanded efforts should be made by BART and the operating contractor to improve the maintenance function to increase vehicle reliability and reduce the growing rates of mechanical failures on this service.

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I. INTRODUCTION

Public Utilities Code (PUC) Section 99246 requires that a performance audit be conducted every three years of each public transit operator in California. The audit requirement pertains to recipients of Transportation Development Act (TDA) funds and is intended to assure that the funds are being used efficiently. The substance and process of the performance audit is defined by the Regional Transportation Planning Agency (RTPA).

In the San Francisco Bay Area, the Metropolitan Transportation Commission (MTC) has been designated the RTPA and has this responsibility. By statute, the audit must be conducted in accordance with the U.S. Comptroller General's "Standards for Audit of Governmental Organizations, Programs, Activities, and Functions" (the "yellow book"). The performance audit is a systematic review to determine the extent to which a transit operator has complied with pertinent laws and regulations and conducted operations in an efficient and economical manner. Relative to system compliance testing, all findings are reported regardless of materiality.

This report has been prepared as part of the performance audit of the San Francisco Bay Area Rapid Transit District (BART). BART operates a rapid rail system, which extends primarily into three member counties (Alameda, Contra Costa, and San Francisco), along with parts of San Mateo County and Santa Clara County. BART also operates an automated people mover service between the BART Coliseum Station in Oakland and Oakland International Airport, which began operations in November 2014. In addition, BART began operating its "eBART" (now called "BART-to-Antioch") diesel multiple unit light rail branch line in eastern Contra Costa County in May 2018. The audit period is Fiscal Years 2023 through 2025 (from July 1, 2022 through June 30, 2025).

BART meets its requirement for providing ADA complementary paratransit service through the East Bay Paratransit Consortium (EBPC), which was established by BART and AC Transit. The consortium contracts with a broker, which executes and administers contracts with several service providers for the consortium. EBPC's performance is also included in this performance audit. The EBPC report is included as an appendix, since it is a shared responsibility of both BART and AC Transit.

An overview of BART is provided in Exhibit 1. This is followed by audit period organization charts in Exhibits 2.1 and 2.2, which reflect the basic organizational structure during the audit period. As can be seen, there were few changes in the managerial levels of the organization between FY2023 and FY2025.

Performance Audit and Report Organization

This performance audit of BART was conducted for MTC in accordance with its established procedures for performance audits. The audit consisted of two discrete phases:

- Compliance Audit – Activities in this phase included:
 - An overview of data collection and reporting procedures for the five TDA performance indicators;
 - Analysis of the TDA indicators; and
 - A review of compliance with selected state Public Utilities Code (PUC) requirements.
- Functional Review – Activities in this phase included:
 - A review of actions to implement the recommendations from the prior performance audit;

- Calculation and evaluation of functional performance indicator trends; and
- Findings, conclusions, and the formulation of recommendations.

This report presents the findings from both phases. Comments received from BART and MTC staff regarding the draft report have been incorporated into this final report.

Exhibit 1: System Overview

Location	Headquarters: 2150 Webster Street, Oakland CA 94612
Establishment	BART was established in 1957 by the California State Legislature. In 1962 voters in San Francisco, Alameda and Contra Costa Counties approved a bond issue to fund the core system. Construction began in June 1964 and revenue service began operating in September 1972.
Board	BART is governed by a nine-member Board of Directors, elected by voters in nine districts within the three BART counties. Members serve four-year terms. The Board appoints the General Manager, General Counsel, Controller/Treasurer, District Secretary, and Independent Police Auditor. Day-to-day operations are the responsibility of the General Manager.
Facilities	<p>The BART system consists of 131 miles of track and uses a fleet of 974 new “Fleet of the Future” cars, which have been integrated into service as well as eight diesel multiple unit (DMU) vehicles. There are 50 stations: 21 surface, 14 elevated, and 15 subway. Four of these are a combination of BART and MUNI Metro stations in downtown San Francisco, two are a combination of BART and Valley Transportation Authority (VTA), and one station is a combination of BART and Caltrain in Millbrae.</p> <p>As part of the 131 miles of track, BART operates a 10-mile spur line in eastern Contra Costa County between the BART Pittsburg/Bay Point Station and Antioch. The line, now known as “BART-to-Antioch”, utilizes eight Diesel Multiple Unit (DMU) cars that operate independently and on standard gauge track. A transfer platform just east of Pittsburg/Bay Point Station allows riders to change from traditional BART trains to the BART- to-Antioch trains. The DMU cars are operated and maintained at a dedicated maintenance facility and control center in Antioch.</p> <p>BART also operates a 3.2-mile automated people mover system which provides train service from BART’s Coliseum Station to the Oakland International Airport. The system, known as the Oakland Airport Connector (OAC), is integrated into BART’s existing fare system but does not utilize BART rolling stock and is not physically connected with BART tracks. Instead, it has its own fleet of four cable-drawn automated guideway transit vehicles that operate on fixed guideways. OAC uses an independent control center located near the airport.</p> <p>BART’s administrative offices are located in downtown Oakland. The Operations Control Center (OCC), also in downtown Oakland, functions as the nerve center of the system, performing supervisory control of train operations and remote control of electrification, ventilation, and emergency response systems.</p>
Service Data	BART provides rapid rail service within its three county District comprised of Alameda, Contra Costa, and San Francisco Counties. In

	<p>addition, BART provides service to Colma, South San Francisco, San Bruno, Millbrae and the San Francisco International Airport in San Mateo County as well as Millbrae and Berryessa/North San José stations in Santa Clara County. General hours of operation for rail service are Monday through Friday from 5:00 a.m. to midnight; Saturdays from 6:00 a.m. to midnight; and Sundays and holidays from 8:00 a.m. to midnight. The rail service consists of five lines, four of which provide transbay service.</p> <p>Previously, BART contracted for express bus service to several rail stations. These services were transferred to the local bus operators in the applicable parts of the service area, who provided them as part of their existing networks. BART previously provided subsidies to these local bus operators in exchange for their continuing station access service; however, these payments are being discontinued following the COVID-19 pandemic and associated fiscal and ridership challenges.</p> <p>Fares are collected through an automated fare collection system and BART participates in the regional “Clipper” smart card program. Adult one-way fares at the end of the audit period ranged from \$2.40 to \$19.55. Fares are calculated based on distance traveled, with surcharges for transbay trips, Daly City trips, and trips into San Mateo County. There are also additional surcharges for trips to the San Francisco and Oakland International airports, and a “speed differential premium” based on the scheduled speed of a trip compared to the system average. Discounts are available to children ages 5 through 18 (children under 5 are free), to senior citizens and people with disabilities, as well as to low-income adults.</p> <p>BART provides ADA-mandated complementary paratransit within its service area through a partnership with AC Transit. Known as the East Bay Paratransit Consortium (EBPC), this service is administered and operated through a broker, with several contracted service providers.</p>
<p>Recent Changes</p>	<p>BART implemented a fare increase in January 2024 valued at 5.5 percent on average, a fare increase in January 2025 valued at 5.5 percent and a fare increase in January 2026 valued at 6.2%. These fare increases are part of BART’s inflation-based fare increase program in effect since 2003, proceeds of which are used to fund critical operating service and capital projects.</p> <p>BART increased its low-income discount from 20 percent to 50 percent effective January 1, 2024.</p> <p>As of August 2025, BART has implemented its next-generation fare gate project, which replaced the old gates with pneumatic swing-style barriers. As part of the fare gate replacement, BART had previously completed its phase-out of paper tickets, ending their acceptance in December 2023.</p> <p>In late 2025, BART began participating in the region’s free- and reduced-cost transfer pilot program, in which riders receive up to \$2.85 off their</p>

	<p>next trip with another transit agency within two hours of their first Clipper card tap.</p> <p>As a strategy to maximize police presence and cleanliness, in addition to modifying the number of trains per hour, BART has adjusted train sizing to improve safety and efficiency, in contrast to BART’s prior strategy of running only 10-car trains to promote social distancing. Alongside this change, BART decommissioned all its legacy cars and now runs only “Fleet of the Future” vehicles on the heavy rail portion of the system.</p> <p>After November 30, 2023, blue magnetic-stripe tickets are no longer accepted for fare payment. All riders are now required to use the Clipper card.</p>								
<p>Planned Changes</p>	<p>In partnership with the region’s transit operators, BART is researching the impacts of an institutional, all-agency, prepaid transit pass known as Clipper BayPass. Preliminary results of the pilot show approximately 35 percent increases in transit use among BayPass users versus their peers who did not receive the BayPass.</p> <p>BART’s Transit-Oriented Development program aims to help create communities near stations through development of BART property and partnerships with cities. BART’s goal is to build 20,000 homes and 4.5 million square feet of commercial space on 250 acres of BART-owned property. To help address the Bay Area’s housing crisis, 7,000 of these homes will be classified as affordable.</p> <p>The 2016 voter-approved Measure RR General Obligation bond continues to fund significant rebuilding/reinvestment projects around the system that include replacing worn rails, retrofitting the transbay tube, replacing escalators, and updating waterproofing in tunnels and structures.</p> <p>System expansion projects include the Silicon Valley extension phase II, which is completing its design and broke ground in 2025. The next phase of the project, slated to open in 2036, will construct four new BART stations.</p> <p>BART is modernizing its 50-year-old train control system, as part of the Core Capacity Project, to allow trains to operate more frequently. As part of the project, BART is adding five traction power sub-stations to handle more frequent train service.</p>								
<p>Staff</p>	<p>BART’s budgeted full time equivalent employees as of July 1, 2025, assigned to the following areas:</p> <table data-bbox="560 1654 1149 1850"> <tr> <td>General Manager</td> <td>54.0</td> </tr> <tr> <td>Legal</td> <td>19.0</td> </tr> <tr> <td>District Secretary</td> <td>7.0</td> </tr> <tr> <td>Administration</td> <td>182.6</td> </tr> </table>	General Manager	54.0	Legal	19.0	District Secretary	7.0	Administration	182.6
General Manager	54.0								
Legal	19.0								
District Secretary	7.0								
Administration	182.6								

	External Affairs	49.5
	Police	409.0
	Operations	3,242.6
	Office of Infrastructure Delivery	357.0
	Office of the CFO	139.0
	Chief Information Officer	60.0
	Capitol Corridor	26.0
	Independent Police Auditor	5.0
	Inspector General	6.0
	Planning & Development	<u>43.0</u>
	TOTAL	4,599.8

Exhibit 2.1: Organization Chart FY2023

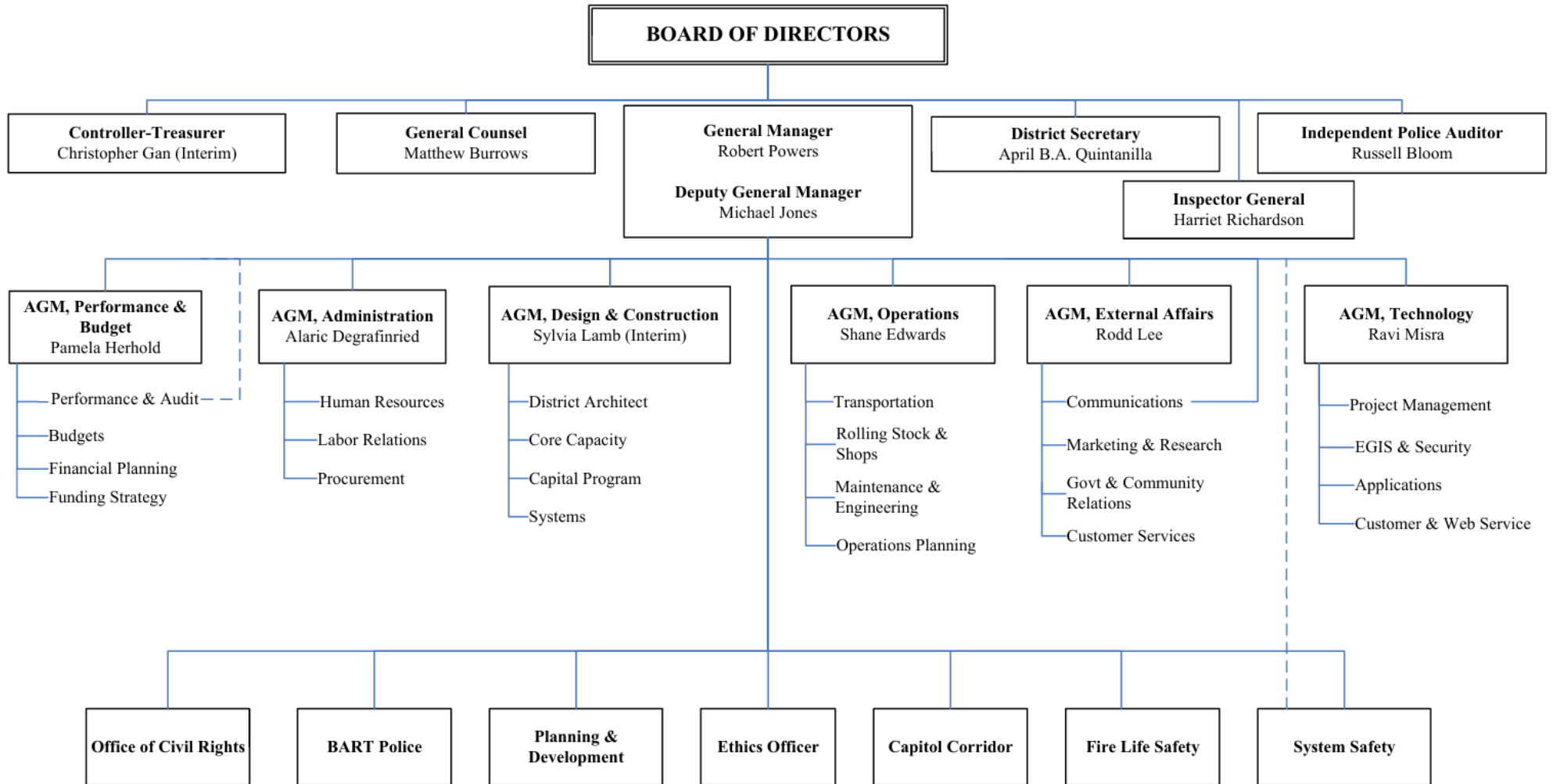
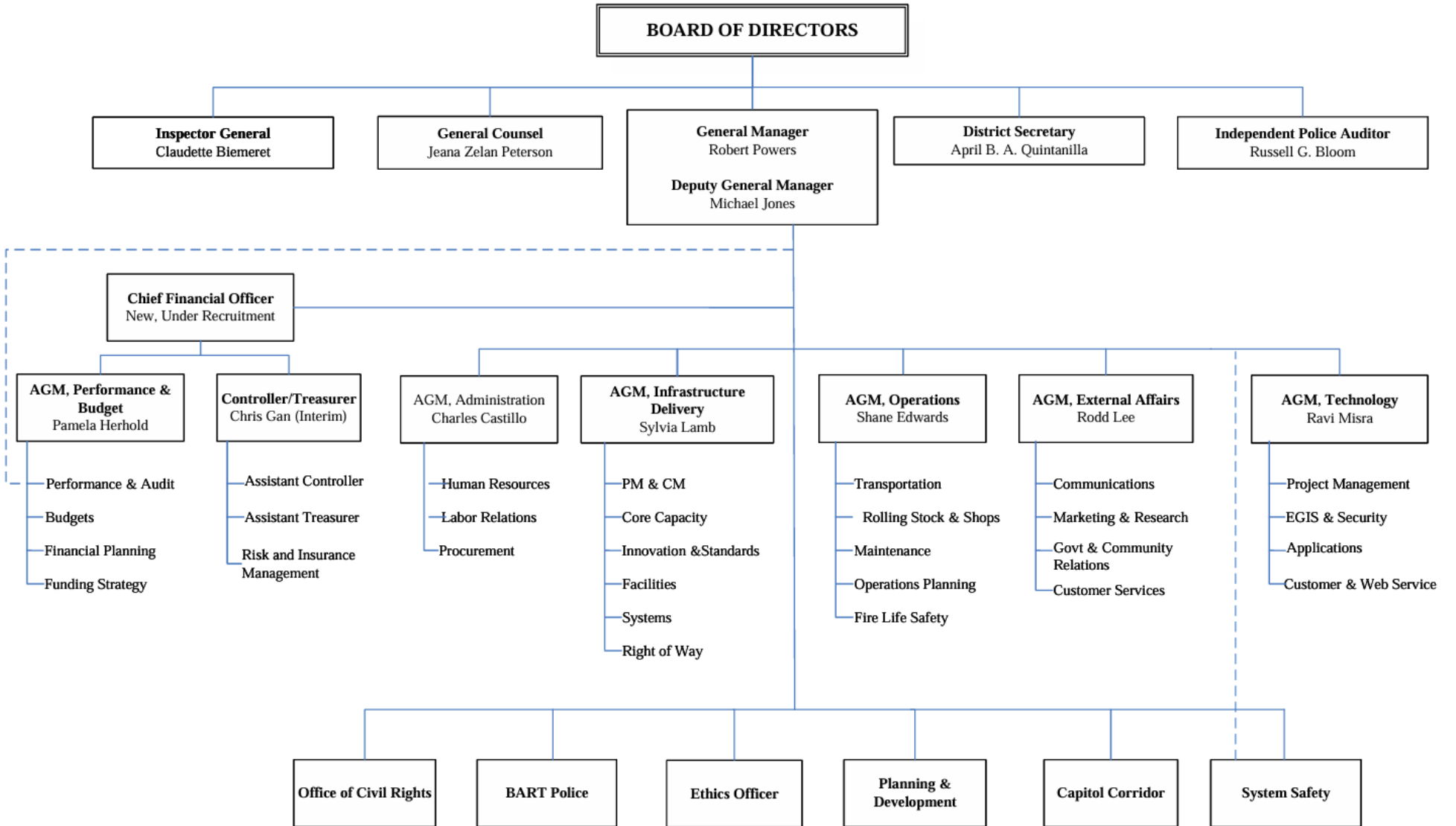


Exhibit 2.2: Organization Chart FY2025



II. REVIEW OF TDA DATA COLLECTION AND REPORTING METHODS

This section focuses on the five performance indicators required by TDA law. These indicators have been defined by the state PUC to evaluate the transit operator's efficiency, effectiveness, and economy. The purpose of this review is to determine if BART is in compliance with the data collection and reporting requirements necessary to calculate the TDA performance indicators. The review is limited to the data items needed to calculate the indicators:

- Operating costs
- Vehicle (car) service hours
- Vehicle (car) service miles
- Unlinked passengers
- Employees (full-time equivalents)

The TDA indicator analysis is based on these operating and financial statistics in the National Transit Database (NTD) reports submitted annually to the Federal Transit Administration (FTA). The information reported by BART covering the audit period has been reviewed.

Compliance with Requirements

To support this review, BART staff confirmed that the data collection and reporting procedures remain unchanged from those described in the prior performance audit. The staff also indicated that the definitions and procedures used to derive the TDA indicator statistics generally are consistent with those used for the NTD reporting system. Based on the information provided, as shown in Exhibit 3.1, BART is in compliance with the data collection and reporting requirements for all five TDA statistics.

Consistency of the Reported Statistics

The resulting TDA statistics for BART's heavy rail, automated people mover and BART-to-Antioch services are shown in Exhibits 3.2 through 3.4, respectively.

Included in the heavy rail exhibit are statistics covering each fiscal year of the three-year audit period, plus the immediately preceding three fiscal years, resulting in a six-year trend. The statistics collected over the period appear to be consistent with the TDA definitions. Further, they indicate general consistency in terms of the direction and magnitude of the year-to-year changes across the statistics. For example, increases or decreases in annual operating costs are relatively proportional to increases or decreases in annual car service hours and miles. Noticeable reductions in car service hours and miles in FY2024 and FY2025, despite increases in operating expenses, appear in line with BART's service adjustments in the post-COVID recovery environment.

Included in the automated people mover exhibit are also statistics resulting in a six-year trend. Again, the statistics collected for that period appear to be consistent with the TDA definitions and indicate general consistency in terms of the direction and magnitude of the year-to-year changes. However, reported car service miles generally varied more significantly during the period than car service hours or operating costs.

The statistics collected for the period for the BART-to-Antioch hybrid rail service also appear to be consistent with the TDA definitions and indicate general consistency in terms of the direction and magnitude of the year-to-year changes, though in some years car service hours and miles did not trend closely to each other or operating costs.

Exhibit 3.1: Compliance with TDA Data Collection and Reporting Requirements

TDA Statistic	TDA Definition	Compliance Finding	Verification Information
Operating Cost	<p>“Operating cost” means all costs in the operating expense object classes exclusive of the costs in the depreciation and amortization expense object class of the uniform system of accounts and records adopted by the Controller pursuant to Section 99243, and exclusive of all subsidies for commuter rail services operated under the jurisdiction of the Interstate Commerce Commission and of all direct costs for providing charter services, and exclusive of all vehicle lease costs.</p>	<p>In Compliance</p>	<p>Definition in accordance with NTD reporting requirements; tracked by Executive Office of Finance.</p> <p>Reported by function for each object class, which divides expenses into categories such as labor, fringe benefits, services, or materials and supplies. This includes subsidy payments to local bus operators for feeder service. Operating expenses for the Oakland Airport Connector are reported separately under MG – PT mode, and operating expenses for the hybrid rail extension are reported separately under YR – DO mode.</p> <p>The District reports its share of purchased transportation expenses associated with the contract for the East Bay Paratransit program in BART’s NTD report, including all related expenses associated with the administration of the program. Total costs of the East Bay Paratransit program, including allocated wages and benefits of BART personnel for administration and other expenses, are reported by AC Transit in its NTD report.</p>
Vehicle Service Hours	<p>“Vehicle service hours” means the total number of hours that each transit vehicle is in revenue service, including layover time.</p>	<p>In Compliance</p>	<p>Includes hours accumulated by a rail car in service with the intent to provide revenue service and carry passengers (from door-close at first station to door-open at last station on each one-way trip).</p> <p>Reported by Reliability Engineering.</p>

TDA Statistic	TDA Definition	Compliance Finding	Verification Information
			<p>Train control computer system (ICS) collects train movement data.</p> <p>PFM car mile accumulation system processes ICS train movement data, and determines car service hours based on wheel roll information.</p>
Vehicle Service Miles	<p>“Vehicle service miles” means the total number of miles that each transit vehicle is in revenue service.</p>	In Compliance	<p>Includes miles accumulated by a rail car in service with the intent to provide revenue service and carry passengers.</p> <p>Gathered directly from PFM car mile accumulation system, actuated by door-open cycle of train beginning revenue service.</p> <p>Reported by Reliability Engineering.</p>
Unlinked Passengers	<p>“Unlinked passengers” means the number of boarding passengers, whether revenue producing or not, carried by the public transportation system.</p>	In Compliance	<p>Includes all single passenger trips without a transfer to another rail route.</p> <p>Ridership recorded by computerized DAS, based on passenger entry and exit activity transmitted by fare gates.</p> <p>DAS can identify station unlinked trips requiring a transfer within the BART system.</p> <p>Reported by the Department of Financial Planning.</p>
Employee Full-Time Equivalents	<p>2,000 person-hours of work in one year constitute one employee.</p>	In Compliance	<p>Hours of service include paid hours for work, vacation, holiday, illness, disability, leave of absence, etc.</p> <p>Count of employee hours is from the Payroll & Finance PeopleSoft reports. The Budget Department uses queries for operating and capital work hours. Headcount is measured using a</p>

TDA Statistic	TDA Definition	Compliance Finding	Verification Information
			<p>vacant/filled report for the last day of the fiscal year.</p> <p>Count of full-time and part-time employees is from the Human Resources Information System PeopleSoft reports.</p>

Exhibit 3.2: TDA Statistics – Heavy Rail

TDA Statistics	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	<i>Avg. Annual Change</i>
Operating Cost (Actual \$)	\$658,199,898	\$611,176,963	\$659,542,867	\$754,188,006	\$851,562,085	\$886,095,700	- -
<i>Annual Change</i>	- -	-7.1%	7.9%	14.4%	12.9%	4.1%	6.1%
Operating Cost (Constant \$)	\$658,199,898	\$586,024,138	\$587,753,058	\$656,905,672	\$720,132,176	\$735,161,565	- -
<i>Annual Change</i>	- -	-11.0%	0.3%	11.8%	9.6%	2.1%	2.2%
Car Service Hours	2,004,002	1,650,674	2,427,363	2,669,501	2,273,862	2,166,352	- -
<i>Annual Change</i>	- -	-17.6%	47.1%	10.0%	-14.8%	-4.7%	1.6%
Car Service Miles	69,799,195	49,113,169	77,158,833	83,783,824	71,858,025	67,749,001	- -
<i>Annual Change</i>	- -	-29.6%	57.1%	8.6%	-14.2%	-5.7%	-0.6%
Unlinked Passengers	88,698,878	17,125,273	36,774,619	49,043,322	53,222,212	56,592,868	- -
<i>Annual Change</i>	- -	-80.7%	114.7%	33.4%	8.5%	6.3%	-8.6%
Employee Full-Time Equivalents	3,117.5	2,732.4	2,862.0	3,066.6	3,809.2	3,840.0	- -
<i>Annual Change</i>	- -	-12.4%	4.7%	7.1%	24.2%	0.8%	4.3%
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

Sources: *FY2020 through FY2022 - Prior Performance Audit Report*
FY2023 through FY2025 - NTD Reports
CPI Data - U.S. Department of Labor, Bureau of Labor Statistics

Exhibit 3.3: TDA Statistics – Automated People Mover

TDA Statistics	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Avg. Annual Change
Operating Cost (Actual \$)	\$7,738,282	\$7,848,857	\$8,005,186	\$8,377,661	\$8,883,741	\$8,707,635	- -
Annual Change	- -	1.4%	2.0%	4.7%	6.0%	-2.0%	2.4%
Operating Cost (Constant \$)	\$7,738,282	\$7,525,839	\$7,133,839	\$7,297,031	\$7,512,626	\$7,224,410	- -
Annual Change	- -	-2.7%	-5.2%	2.3%	3.0%	-3.8%	-1.4%
Car Service Hours	19,172	17,819	19,787	20,044	19,949	19,686	- -
Annual Change	- -	-7.1%	11.0%	1.3%	-0.5%	-1.3%	0.5%
Car Service Miles	325,053	212,199	262,125	258,323	258,320	247,826	- -
Annual Change	- -	-34.7%	23.5%	-1.5%	0.0%	-4.1%	-5.3%
Unlinked Passengers	573,123	112,981	377,608	457,366	432,021	398,541	- -
Annual Change	- -	-80.3%	234.2%	21.1%	-5.5%	-7.7%	-7.0%
Employee Full-Time Equivalents	(a)	(a)	(a)	(a)	(a)	(a)	- -
Annual Change	- -	- -	- -	- -	- -	- -	- -
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
Cumulative Change	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

(a) Not applicable as service is provided by an outside contractor.

Sources: FY2020 through FY2022 - Prior Performance Audit Report
 FY2023 through FY2025 - NTD Reports
 CPI Data - U.S. Department of Labor, Bureau of Labor Statistics

Exhibit 3.4: TDA Statistics – Hybrid Rail

TDA Statistics	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Avg. Annual Change
Operating Cost (Actual \$)	\$15,550,731	\$13,198,004	\$17,965,407	\$19,617,059	\$22,463,561	\$24,513,178	- -
<i>Annual Change</i>	- -	-15.1%	36.1%	9.2%	14.5%	9.1%	9.5%
Operating Cost (Constant \$)	\$15,550,731	\$12,654,844	\$16,009,911	\$17,086,664	\$18,996,540	\$20,337,698	- -
<i>Annual Change</i>	- -	-18.6%	26.5%	6.7%	11.2%	7.1%	5.5%
Car Service Hours	41,218	40,138	38,879	34,529	40,079	43,552	- -
<i>Annual Change</i>	- -	-2.6%	-3.1%	-11.2%	16.1%	8.7%	1.1%
Car Service Miles	1,183,761	976,607	1,133,958	1,191,602	1,113,639	1,147,819	- -
<i>Annual Change</i>	- -	-17.5%	16.1%	5.1%	-6.5%	3.1%	-0.6%
Unlinked Passengers	1,734,970	601,424	1,071,845	1,263,714	1,273,133	1,377,300	- -
<i>Annual Change</i>	- -	-65.3%	78.2%	17.9%	0.7%	8.2%	-4.5%
Employee Full-Time Equivalent	61.4	53.3	62.4	68.3	80.4	83.9	- -
<i>Annual Change</i>	- -	-13.2%	17.2%	9.5%	17.6%	4.4%	6.5%
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

Sources: FY2020 through FY2022 - Prior Performance Audit Report
 FY2023 through FY2025 - NTD Reports
 CPI Data - U.S. Department of Labor, Bureau of Labor Statistics

III. TDA PERFORMANCE INDICATORS AND TRENDS

The performance trends for BART's heavy rail, automated people mover and hybrid rail services are presented in this section. A similar discussion of the paratransit service provided by EBPC will be provided in a separate EBPC audit report. Performance is discussed for each of the five TDA-mandated performance indicators as applicable:

- operating cost per car service hour
- passengers per car service hour
- passengers per car service mile
- operating cost per passenger
- car service hours per full-time equivalent employee (FTE)

The performance results in these indicators were developed from the information in the NTD reports filed with the FTA for the three years of the audit period by BART. The NTD reports were the source of all included operating and financial statistics. However, as a contracted service, employee FTE data for the automated people mover was unavailable and determined as not relevant for this audit.

In addition to presenting performance for the three years of the audit period (FY2023 through FY2025), this analysis features two enhancements:

Six-Year Time Period – While the performance audit focuses on the three fiscal years of the audit period, six-year trend lines have been constructed for BART's service to provide a longer perspective on performance and to clearly present the direction and magnitude of the performance trends. In this analysis, the FY2023 to FY2025 trend lines have been combined with those from the prior audit period (FY2020 through FY2022) to define a six-year period of performance.

Normalized Cost Indicators for Inflation – Two financial performance indicators (cost per hour and cost per passenger) are presented in both constant and current dollars to illustrate the impact of inflation in the Bay Area. The inflation adjustment relies on the All-Urban Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for the San Francisco Metropolitan Area. The average CPI-W percent change for each fiscal year has been calculated based on the bi-monthly results reported on the U.S. Department of Labor – Bureau of Labor Statistics website. The CPI-W is used since labor is the largest component of operating cost in transit. Since labor costs are typically controlled through labor contracts, changes in normalized costs largely reflect those factors that are within the day-to-day control of the transit system.

The following discussion is organized to present an overview of BART's performance trends in each of the five TDA performance indicators. The analysis is also expanded to include a breakdown of the various component costs that contributed to the total and hourly operating costs. The discussion is organized by service mode. The heavy rail service is discussed first, followed by automated people mover and then hybrid rail. It should be noted that for all of these rail modes, the operating statistics utilized are car service hours and miles, not train service hours and miles.

Heavy Rail Performance Trends

This section provides an overview of the performance of BART's heavy rail service over the past six years. The trends in the TDA indicators and input statistics are presented in Exhibit 4. The six-year trends are illustrated in Exhibits 4.1 through 4.4.

- Operating Cost per Car Service Hour (Exhibit 4.1)
 - A key indicator of cost efficiency, the cost per hour of heavy rail service increased an average of 4.5 percent annually, as service hours went up just slightly per year overall even as operating costs increased by six percent.

- The cost per hour ranged from a period low of \$271.71 in FY2022 to a high of \$409.03 in the last year.
- There were increases in every year except FY2022. The largest annual increase was in FY2024 (32.6 percent).
- In constant FY2020 dollars, there was an average annual increase in this indicator of 0.7 percent.
- Passengers per Car Service Hour (Exhibit 4.2)
 - A key indicator of passenger productivity, passengers per hour decreased an average of ten percent annually during the six-year period.
 - Passengers per hour decreased precipitously between FY2020 and FY2021, from about 44 to just ten passengers.
 - This trend was driven by major decreases in passengers coinciding with the first full year of the COVID pandemic (FY2021). Service hours were reduced at the same time but not by nearly as much.
 - This was followed by a significant improving trend through the remainder of the period, coinciding with the recovery from the pandemic, though still not even nearly back to pre-pandemic levels as of FY2025.
- Passengers per Car Service Mile (Exhibit 4.2)
 - Relatively similar to passengers per hour, heavy rail passengers per mile decreased by eight percent annually on average.
 - There were 1.27 passengers per mile in the first year, followed by a 73 percent decrease to just 0.35 passengers in the following year, FY2021.
 - Again, the trend was driven by the major decrease in passengers coinciding with the first full year of the COVID pandemic.
 - Subsequently, there was a significant improving trend through the remainder of the period, coinciding with the recovery from the pandemic, though only there were still just 0.84 passengers per mile by FY2025.

- Operating Cost per Passenger (Exhibit 4.3)
 - A key measure of cost effectiveness, the cost per passenger increased about five-fold from \$7.42 in FY2020 to \$35.69 in FY2021 (the first full year of the pandemic).
 - Starting in FY2022, the cost per passenger for the remainder of the period leveled out to range between \$15 and \$18.
 - The resulting trend showed an increase of 16.1 percent on average annually over the six-year period.
 - With the impact of inflation removed from the cost side (normalization), the six-year result was still an average annual increase of nearly 12 percent.
- Car Service Hours per Employee (FTE) (Exhibit 4.4)
 - A measure of employee productivity, car service hours per employee decreased by 2.6 percent on average per year over the period, from 643 hours in FY2020 to 564 in FY2025.
 - However there was intermediate variation, with notably higher results in FY2022 and FY2023 (well over 800 hours in each of those years).
 - The largest annual increase (40 percent) occurred in FY2022, while the largest annual decrease (31 percent) occurred in FY2024.
 - According to BART staff, the trend in this indicator was particularly influenced by post-COVID response service changes, especially in Fall 2021, when BART restored service significantly from its early COVID lows. Further, in Fall 2023 there was another significant schedule change in which BART reduced its train lengths and introduced its "reimagined service plan" featuring 20-minute headways.

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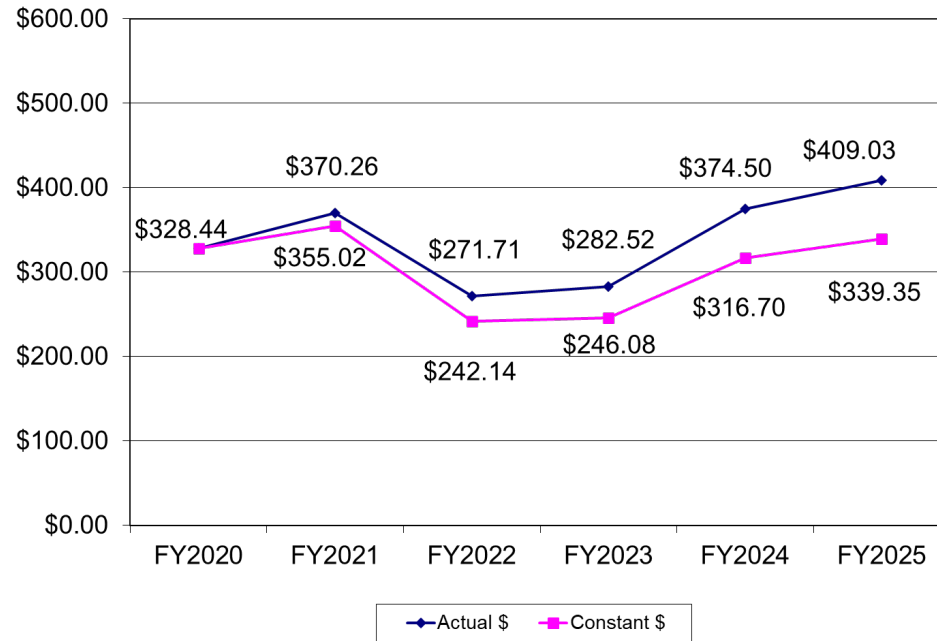
The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:

- There was an average annual increase in the operating cost per hour of 4.5 percent, or 0.7 percent in inflation adjusted dollars. There were increases in every year except FY2022. The largest annual increase was in FY2024 (32.6 percent).
- Passenger productivity showed a notable decline, with passengers per vehicle service hour and mile decreasing by ten and eight percent per year overall, respectively. These trends were most significantly impacted by a major ridership decline in FY2021, the first full year of the COVID pandemic.
- The cost per passenger increased on average by 16.1 percent per year, which, when measured in constant FY2020 dollars, was still an increase of nearly 12 percent. This trend was also most significantly impacted by the major ridership decline in FY2021.
- For employee productivity, car service hours per employee decreased by 2.6 percent on average per year, though there were notably higher results in FY2022 and FY2023. The trend was significantly influenced by post-COVID response service restoration in Fall 2021, and major schedule changes in Fall 2023.

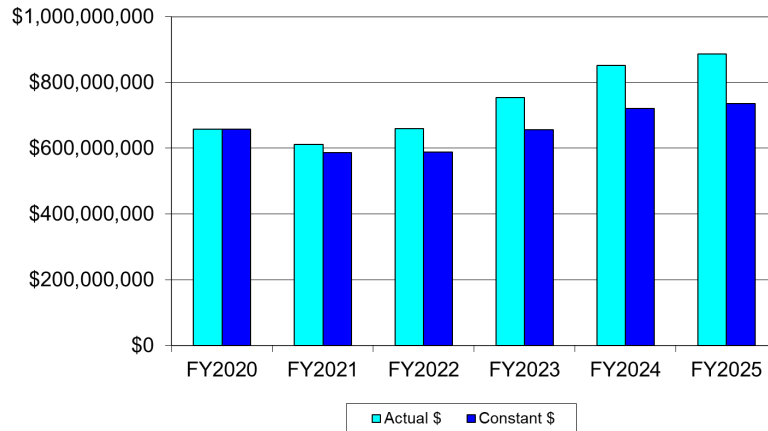
Exhibit 4: TDA Indicator Performance – Heavy Rail

TDA Performance Indicator	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	<i>Avg. Annual Change</i>
Op. Cost per Car Svc. Hour (Actual \$)	\$328.44	\$370.26	\$271.71	\$282.52	\$374.50	\$409.03	- -
<i>Annual Change</i>	- -	12.7%	-26.6%	4.0%	32.6%	9.2%	4.5%
Op. Cost per Car Svc. Hour (Constant \$)	\$328.44	\$355.02	\$242.14	\$246.08	\$316.70	\$339.35	- -
<i>Annual Change</i>	- -	8.1%	-31.8%	1.6%	28.7%	7.2%	0.7%
Passengers per Car Service Hour	44.3	10.4	15.2	18.4	23.4	26.1	- -
<i>Annual Change</i>	- -	-76.6%	46.0%	21.3%	27.4%	11.6%	-10.0%
Passengers per Car Service Mile	1.27	0.35	0.48	0.59	0.74	0.84	- -
<i>Annual Change</i>	- -	-72.6%	36.7%	22.8%	26.5%	12.8%	-8.0%
Op. Cost per Passenger (Actual \$)	\$7.42	\$35.69	\$17.93	\$15.38	\$16.00	\$15.66	- -
<i>Annual Change</i>	- -	380.9%	-49.7%	-14.3%	4.0%	-2.1%	16.1%
Op. Cost per Passenger (Constant \$)	\$7.42	\$34.22	\$15.98	\$13.39	\$13.53	\$12.99	- -
<i>Annual Change</i>	- -	361.1%	-53.3%	-16.2%	1.0%	-4.0%	11.9%
Car Service Hours per FTE	642.8	604.1	848.1	870.5	596.9	564.2	- -
<i>Annual Change</i>	- -	-6.0%	40.4%	2.6%	-31.4%	-5.5%	-2.6%
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

Exhibit 4.1: Operating Cost per Car Service Hour – Heavy Rail



Operating Cost



Car Service Hours

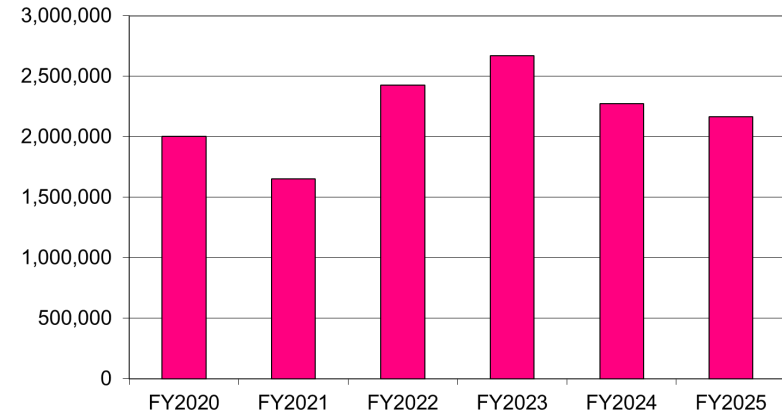
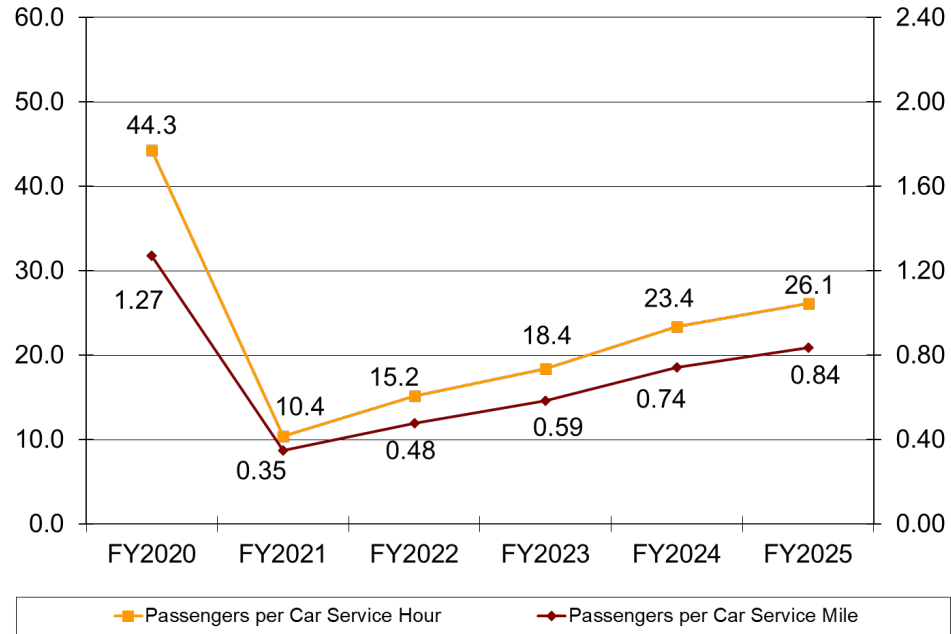
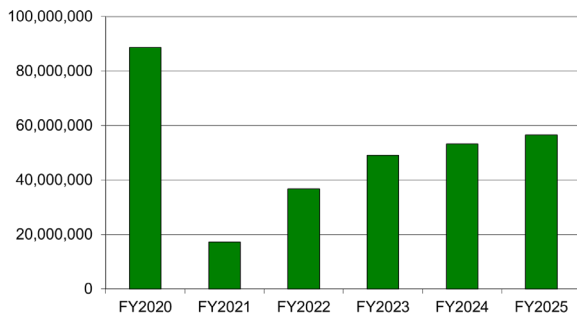


Exhibit 4.2: Passengers per Hour and per Mile – Heavy Rail



Unlinked Passengers



Car Service Hours



Car Service Miles

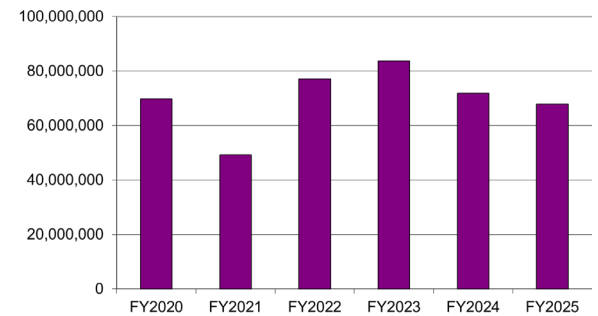
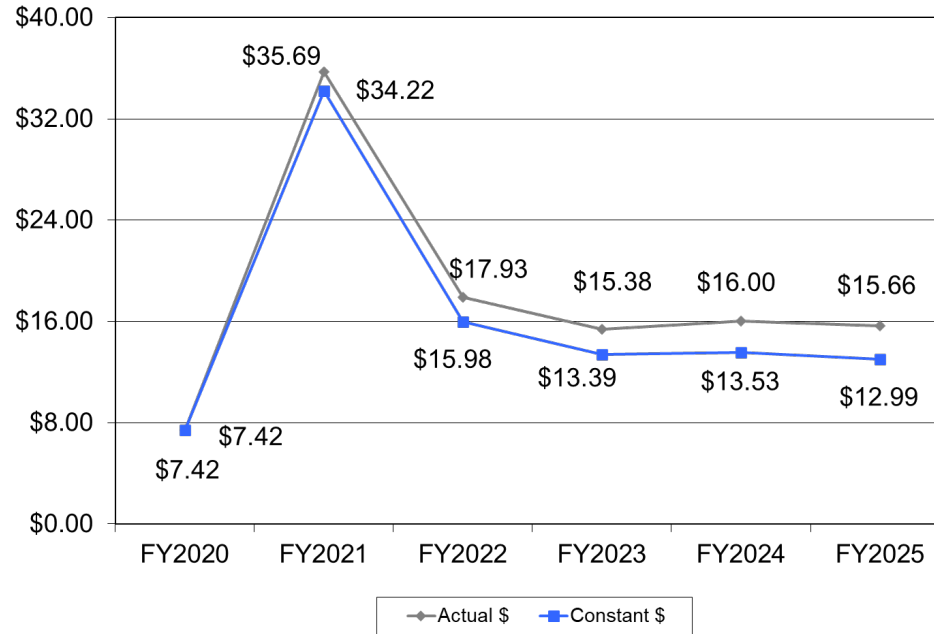
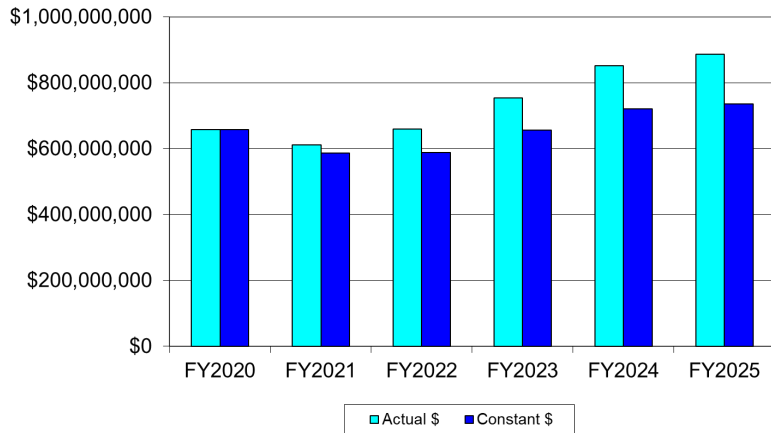


Exhibit 4.3: Operating Cost per Passenger – Heavy Rail



Operating Cost



Unlinked Passengers

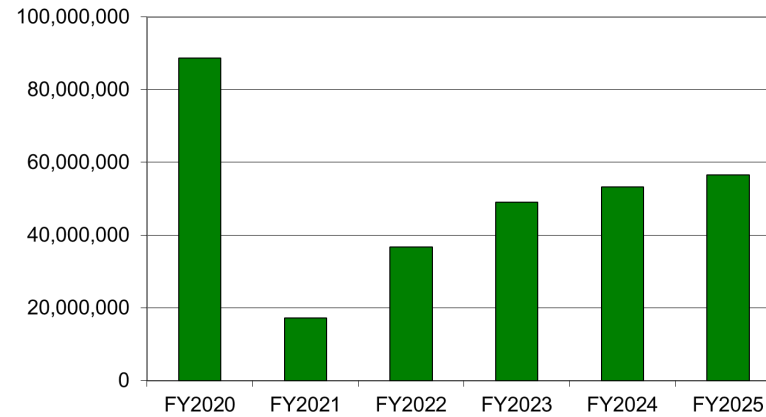
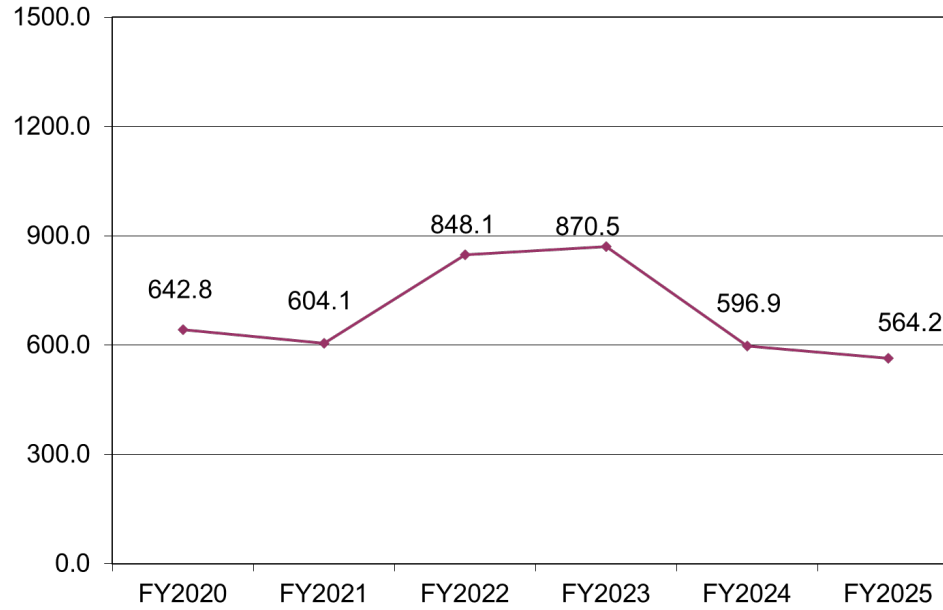
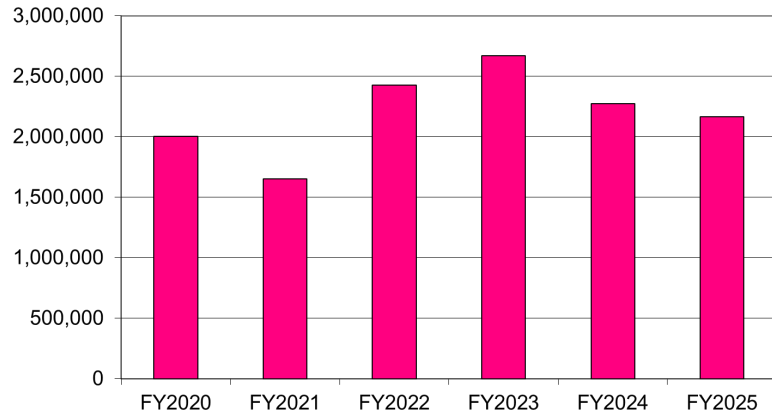


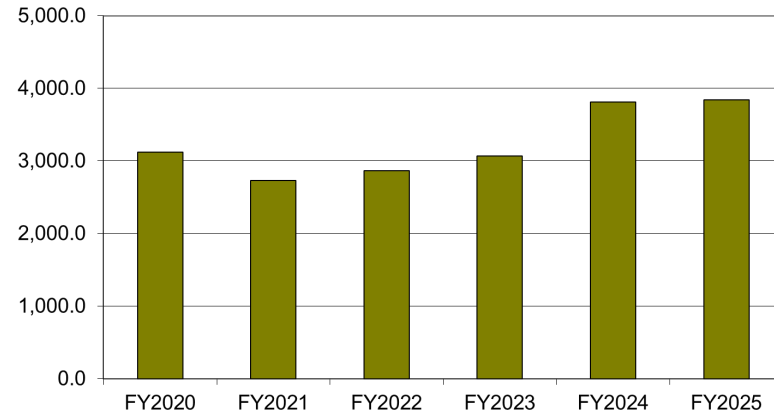
Exhibit 4.4: Car Service Hours per FTE – Heavy Rail



Car Service Hours



Full-time Equivalent



Heavy Rail Component Costs

Year-to-year changes in selected operating cost categories over the six year review period are presented in Exhibit 4.5. Examining components of operating costs (e.g., labor, fringes, fuel, and casualty/liability) may determine what particular components had the most significant impacts on the operating costs. Exhibit 4.5 also shows the concurrent changes in car service hours and Exhibit 4.6 illustrates the portion of the cost per heavy rail service hour that can be attributed to each included cost component.

- The most significant change was an average annual increase of 23.3 percent in the casualty/liability area. There was significant variation from year to year, but casualty/liability costs ranged only between one and four percent of total costs.
- Labor costs represented the largest portion of the total costs overall, remaining a little below 50 percent throughout the period.
- Fringe benefits comprised the second largest portion, ranging from 25 to 30 percent of total costs depending on the year.
- Labor costs increased by 6.1 percent on average per year, while fringe benefits costs went up at an annual rate of 5.8 percent.
- Services costs primarily accounted for about nine percent of total costs through the review period, materials/supplies about five percent, and utilities about seven percent. All three of those categories showed average annual increases of about five percent.
- The “other expenses” category (including taxes as applicable) consistently accounted for about one percent of total costs, and increased by 1.6 percent annually, on average.

* * * * *

The following is a brief summary of the heavy rail component operating costs trend highlights between FY2020 and FY2025:

- The most significant change was a 23.3 percent average annual increase in casualty/liability costs, though these costs represented only a small portion of total costs.
- Labor costs went up by 6.1 percent per year on average, and were the largest portion of total costs in all years, at nearly 50 percent.
- Fringe benefits costs comprised the second largest cost category. They increased on average by 5.8 percent annually, while remaining between 25 and 30 percent of total costs.
- Services, materials/supplies and utilities costs each accounted for less than ten percent of total costs and posted average annual increases of about five percent.

Exhibit 4.5: Component Cost Trends – Heavy Rail

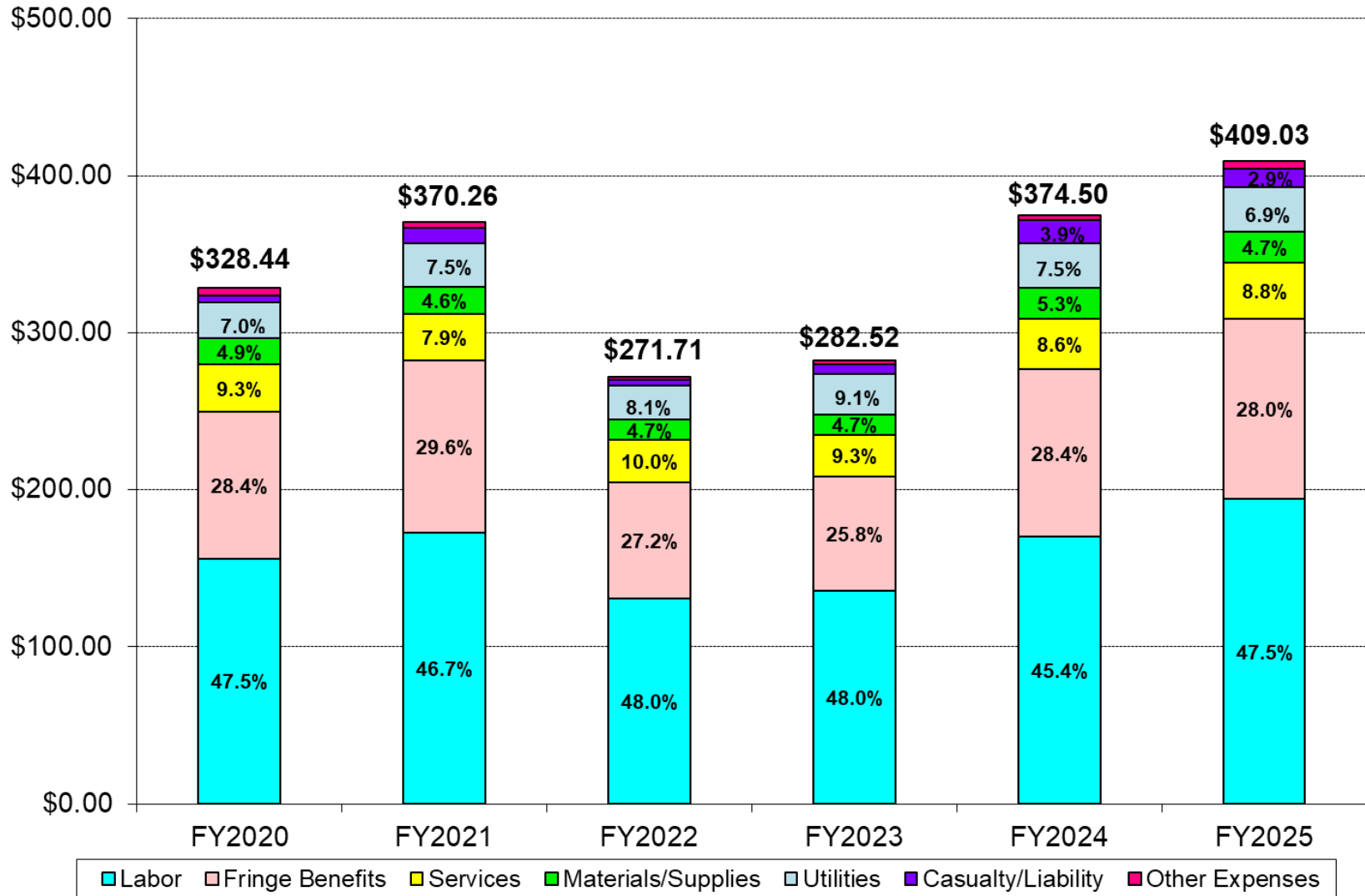
	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
COST CATEGORIES							
Labor (Salaries/Wages)	\$312,745,459	\$285,206,639	\$316,865,633	\$361,977,766	\$386,879,467	\$420,559,888	--
<i>Annual Change</i>	--	-8.8%	11.1%	14.2%	6.9%	8.7%	6.1%
Fringe Benefits (a)	\$187,220,946	\$181,163,685	\$179,323,903	\$194,777,079	\$241,956,156	\$247,936,436	--
<i>Annual Change</i>	--	-3.2%	-1.0%	8.6%	24.2%	2.5%	5.8%
Services	\$61,164,921	\$48,257,892	\$66,025,372	\$70,189,148	\$73,331,040	\$77,924,748	--
<i>Annual Change</i>	--	-21.1%	36.8%	6.3%	4.5%	6.3%	5.0%
Materials/Supplies (b)	\$32,565,516	\$28,365,108	\$31,011,089	\$35,283,697	\$44,795,487	\$42,083,089	--
<i>Annual Change</i>	--	-12.9%	9.3%	13.8%	27.0%	-6.1%	5.3%
Utilities	\$46,185,741	\$46,086,823	\$53,507,337	\$68,347,511	\$64,285,070	\$61,539,858	--
<i>Annual Change</i>	--	-0.2%	16.1%	27.7%	-5.9%	-4.3%	5.9%
Casualty/Liability	\$9,153,066	\$16,509,973	\$7,873,215	\$16,182,365	\$33,369,851	\$26,122,041	--
<i>Annual Change</i>	--	80.4%	-52.3%	105.5%	106.2%	-21.7%	23.3%
Other Expenses (c)	\$9,164,249	\$5,586,843	\$4,936,318	\$7,430,440	\$6,945,014	\$9,929,640	--
<i>Annual Change</i>	--	-39.0%	-11.6%	50.5%	-6.5%	43.0%	1.6%
Total	\$658,199,898	\$611,176,963	\$659,542,867	\$754,188,006	\$851,562,085	\$886,095,700	--
<i>Annual Change</i>	--	-7.1%	7.9%	14.4%	12.9%	4.1%	6.1%
OPERATING STATISTICS							
Car Service Hours	2,004,002	1,650,674	2,427,363	2,669,501	2,273,862	2,166,352	--
<i>Annual Change</i>	--	-17.6%	47.1%	10.0%	-14.8%	-4.7%	1.6%

(a) Also includes paid absences

(b) Includes fuel/lubricants, tires/tubes, and other materials/supplies

(c) Includes taxes, and miscellaneous expenses

Exhibit 4.6: Distribution of Component Costs – Heavy Rail
Operating Cost per Car Service Hour



Automated People Mover Performance Trends

This section provides an overview of the performance of BART's automated people mover service during the six-year review period. The trends in the TDA indicators and input statistics are presented in Exhibit 5. The six-year trends are illustrated in Exhibits 5.1 through 5.3.

- Operating Cost per Car Service Hour (Exhibit 5.1)
 - The cost per hour of automated people mover service increased an average of 1.8 percent annually, as service hours were almost even in FY2020 and FY2025 while corresponding operating costs increased by 2.4 percent.
 - The cost per hour ranged from period lows of about \$404 in FY2020 and FY2022, to period highs of about \$445 in the last two years.
 - In constant FY2020 dollars, there was an average annual decrease in this indicator of 1.9 percent.
- Passengers per Car Service Hour (Exhibit 5.2)
 - Automated people mover passengers per hour decreased an average of 7.5 percent annually during the six-year period.
 - An 80 percent reduction in passengers in the first full year of the pandemic (FY2021) resulted in a major drop from 30 to just six passengers per hour in that year.
 - A turnaround in passenger levels in FY2022 led to about 20 passengers per hour recorded through the end of the review period.
- Passengers per Car Service Mile (Exhibit 5.2)
 - Similar to passengers per hour, automated people mover passengers per mile decreased overall during the period, but by just 1.8 percent annually on average.
 - There were 1.8 passengers per mile in the first year, followed by a substantial 70 percent decrease to 0.5 in FY2021, the first full year of the COVID pandemic.

- Subsequently, a recovery to 1.5 or more passengers per mile was documented for the remainder of the period, despite some modest downturns in the last two years.
- Operating Cost per Passenger (Exhibit 5.3)
 - The automated people mover cost per passenger was \$13.50 in the first year, then jumped all the way to \$70 in FY2021 (the first full year of the pandemic).
 - This was followed by a sharp decrease back to about \$20 for the remainder of the period, as annual passenger levels stabilized around 400,000 while operating costs varied relatively modestly.
 - The resulting trend in cost per passenger showed an increase of 10.1 percent on average annually over the six-year period.
 - With the impact of inflation removed from the cost side (normalization), the six-year result was an average annual increase of 6.1 percent.

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The following is a brief summary of the automated people mover TDA performance trend highlights over the six-year period of FY2020 through FY2025:

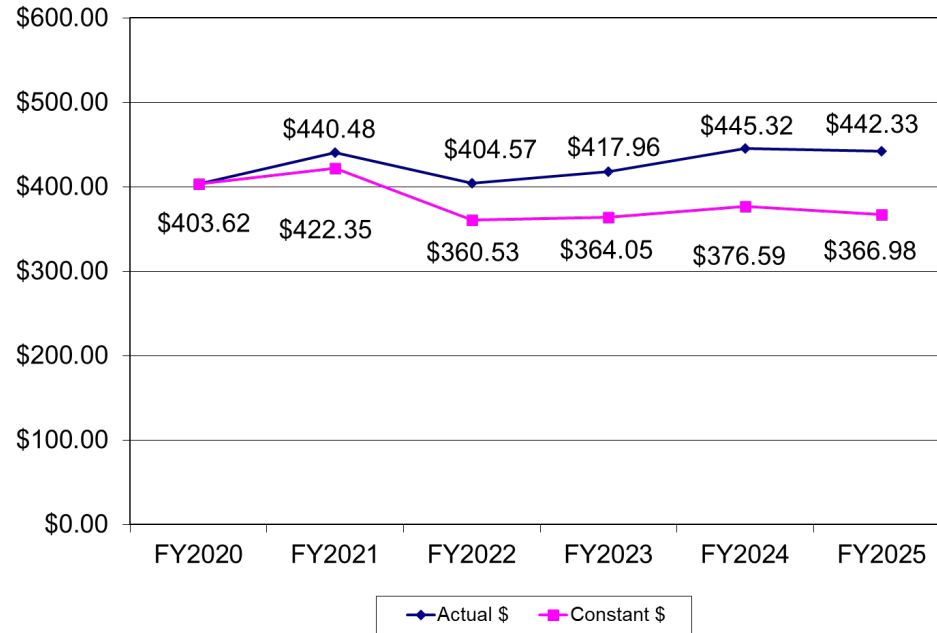
- There was an average annual increase in the operating cost per hour of 1.8 percent, which amounted to a decrease of 1.9 percent in inflation adjusted dollars. Service hours were almost even in FY2020 and FY2025 while corresponding operating costs increased by 2.4 percent.
- Passenger productivity showed overall decline, with passengers per vehicle service hour and mile decreasing by 7.5 percent and 1.8 percent per year on average. These trends reflect an 80 percent reduction in passengers in the first full year of the pandemic (FY2021), but substantial rebounding subsequently.
- The cost per passenger increased on average by 10.1 percent per year, which when measured in constant FY2020 dollars, resulted in an average annual increase of 6.1 percent. This trend was also significantly impacted by the major ridership decline in FY2021, and rebounding starting in FY2022.

Exhibit 5: TDA Indicator Performance – Automated People Mover

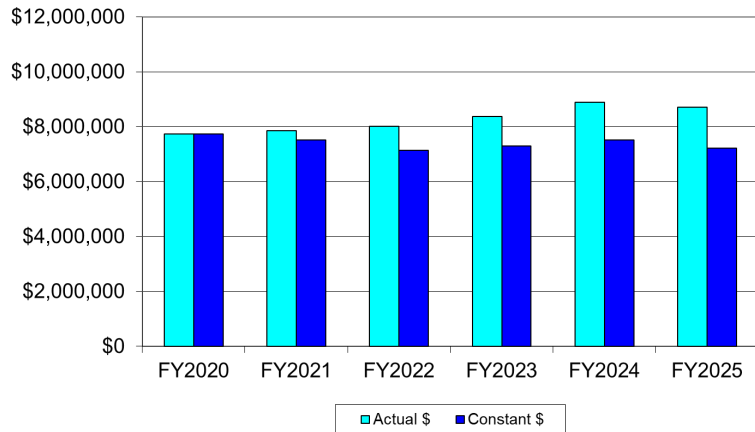
TDA Performance Indicator	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	<i>Avg. Annual Change</i>
Op. Cost per Car Svc. Hour (Actual \$)	\$403.62	\$440.48	\$404.57	\$417.96	\$445.32	\$442.33	- -
<i>Annual Change</i>	- -	9.1%	-8.2%	3.3%	6.5%	-0.7%	1.8%
Op. Cost per Car Svc. Hour (Constant \$)	\$403.62	\$422.35	\$360.53	\$364.05	\$376.59	\$366.98	- -
<i>Annual Change</i>	- -	4.6%	-14.6%	1.0%	3.4%	-2.6%	-1.9%
Passengers per Car Service Hour	29.9	6.3	19.1	22.8	21.7	20.2	- -
<i>Annual Change</i>	- -	-78.8%	201.0%	19.6%	-5.1%	-6.5%	-7.5%
Passengers per Car Service Mile	1.76	0.53	1.44	1.77	1.67	1.61	- -
<i>Annual Change</i>	- -	-69.8%	170.6%	22.9%	-5.5%	-3.8%	-1.8%
Op. Cost per Passenger (Actual \$)	\$13.50	\$69.47	\$21.20	\$18.32	\$20.56	\$21.85	- -
<i>Annual Change</i>	- -	414.5%	-69.5%	-13.6%	12.3%	6.3%	10.1%
Op. Cost per Passenger (Constant \$)	\$13.50	\$66.61	\$18.89	\$15.95	\$17.39	\$18.13	- -
<i>Annual Change</i>	- -	393.3%	-71.6%	-15.5%	9.0%	4.2%	6.1%
Car Service Hours per FTE	(a)	(a)	(a)	(a)	(a)	(a)	- -
<i>Annual Change</i>	- -	- -	- -	- -	- -	- -	- -
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

(a) Not applicable as service is provided by an outside contractor.

Exhibit 5.1: Operating Cost per Car Service Hour – Automated People Mover



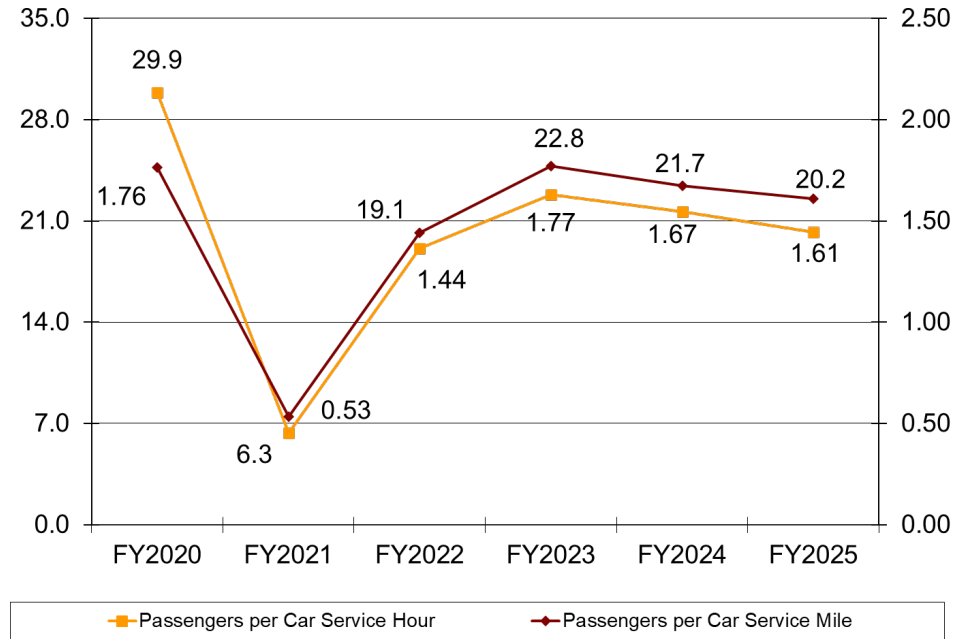
Operating Cost



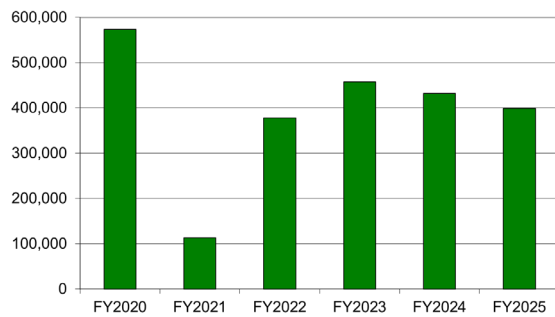
Car Service Hours



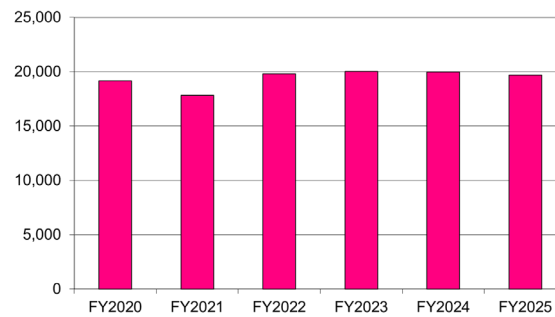
Exhibit 5.2: Passengers per Hour and per Mile – Automated People Mover



Unlinked Passengers



Car Service Hours



Car Service Miles

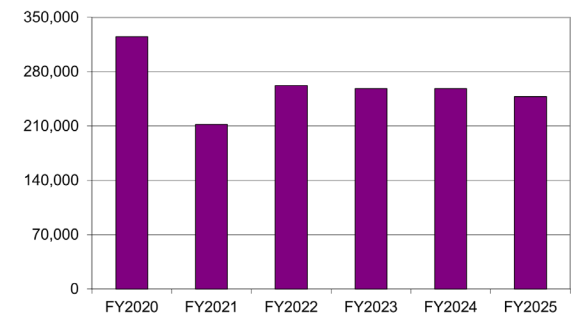
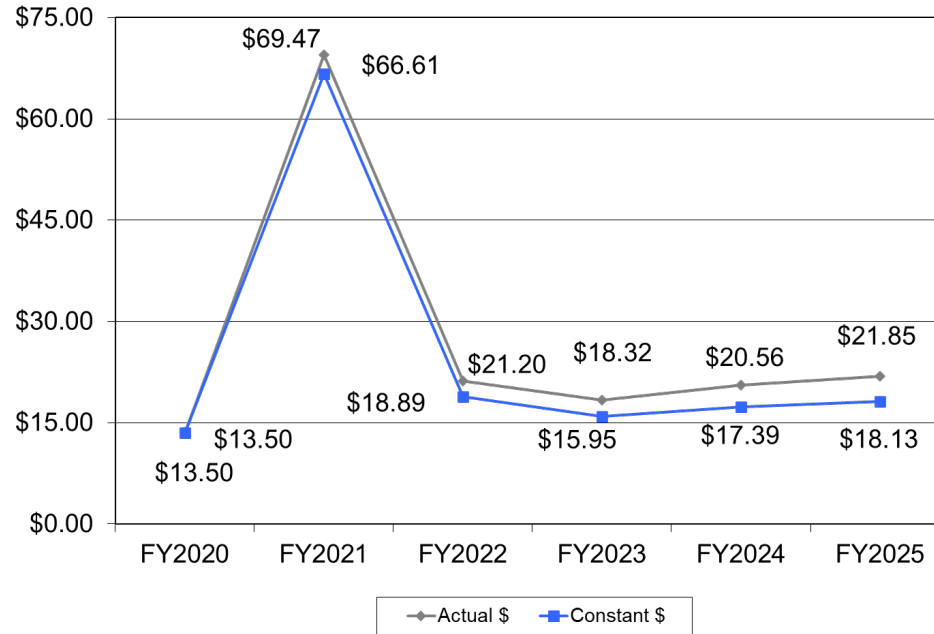
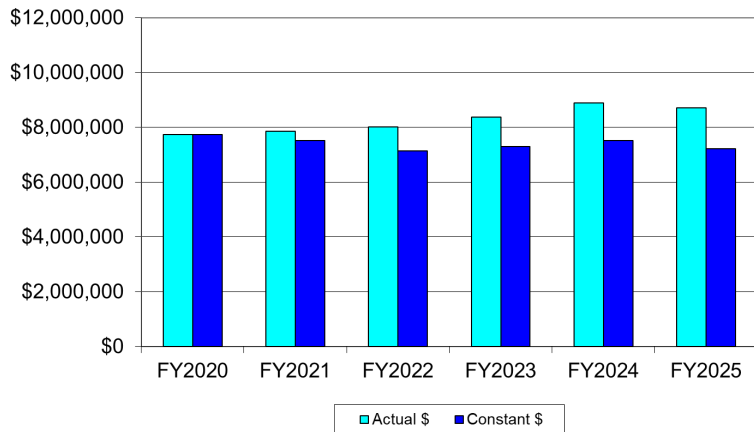


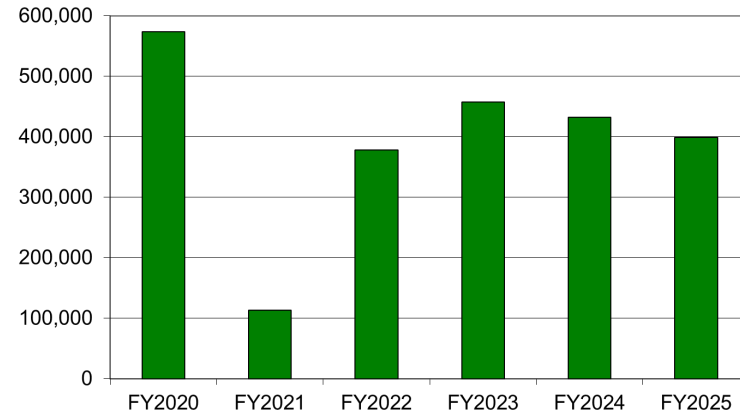
Exhibit 5.3: Operating Cost per Passenger – Automated People Mover



Operating Cost



Unlinked Passengers



Automated People Mover Component Costs

The year-to-year changes in selected automated people mover operating cost categories are presented in Exhibit 5.4, along with the concurrent changes in car service hours. The portions of the cost per car service hour that can be attributed to each included cost component are shown in Exhibit 5.5.

- The most significant change was an average annual increase of more than 50 percent in the materials/supplies area. However, the dollar amounts involved were minimal, comprising less than one percent of total costs in any year.
- In-house labor costs varied noticeably from year to year and decreased by 8.3 percent on average annually. The fringe benefits costs trend mirrored that of labor but showed an overall annual decrease of 12.3 percent.
- The in-house labor and fringe benefits cost categories each contributed no more than three percent of total operating costs through the period.
- Utilities costs accounted for ten to 12 percent of total costs and posted an average annual increase of 5.8 percent.
- Casualty/liability costs increased by nearly eight percent per year on average but remained at about one percent of total costs through the period.
- Not surprisingly for a contracted service, purchased transportation was the largest category of costs (83 to 86 percent range), and it increased by 2.4 percent per year overall.

* * * * *

The following is a brief summary of the automated people mover component operating costs trend highlights between FY2020 and FY2025:

- The most significant change was an average annual increase of more than 50 percent in the materials/supplies area, though the dollar amounts involved were minimal.

- In-house labor costs decreased by 8.3 percent per year, while fringe benefits costs decreased by 12.3 percent. Each category contributed no more than three percent of total operating costs.
- Utilities costs remained between ten and 12 percent of total costs, while casualty/liability costs were consistently around one percent.
- Purchased transportation was the largest component of total operating costs for this contracted service, at 83 to 86 percent. Purchased transportation costs increased approximately 2.4 percent per year.

Exhibit 5.4: Component Cost Trends – Automated People Mover

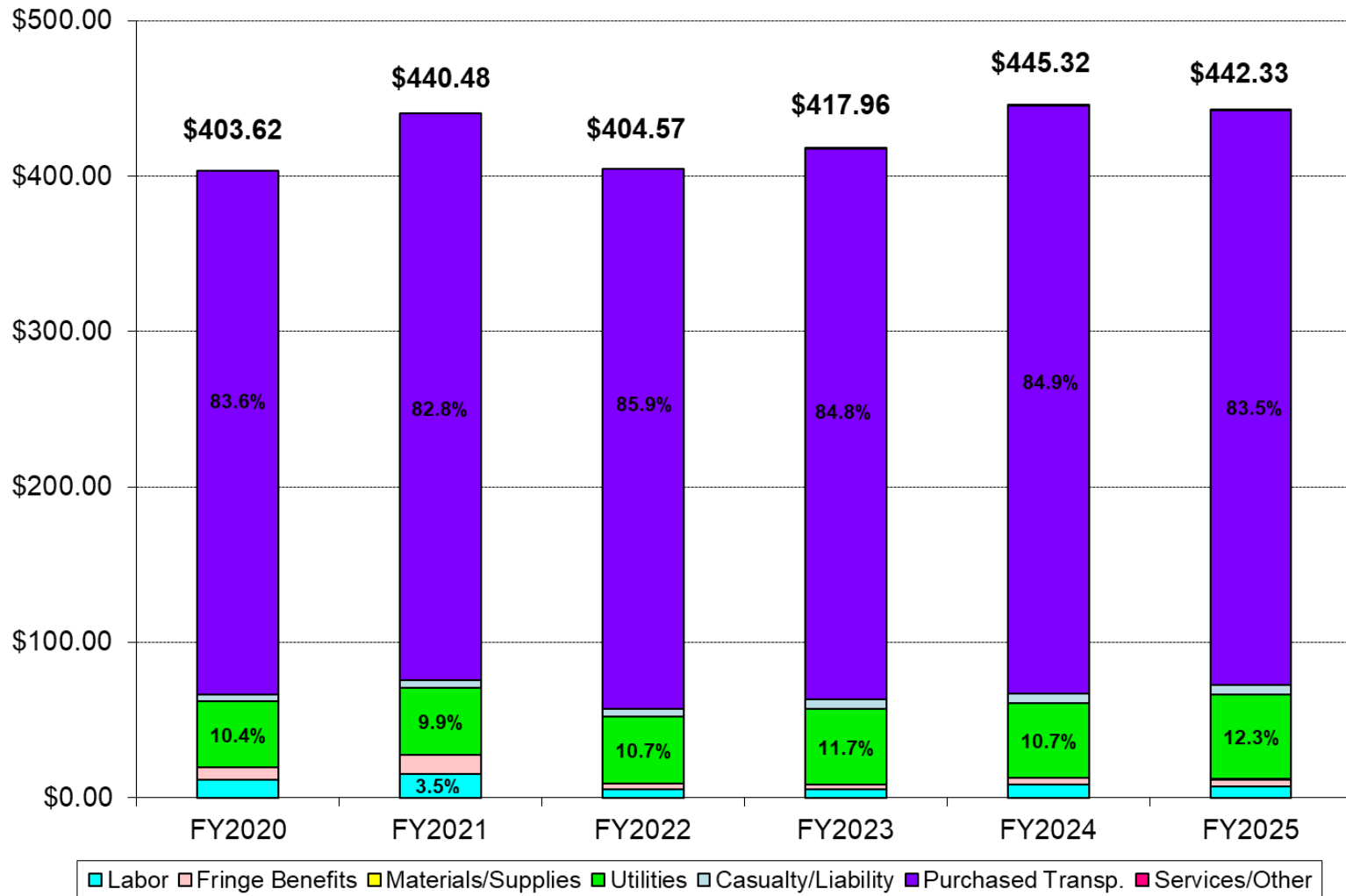
	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
COST CATEGORIES							
Labor (Salaries/Wages)	\$223,272	\$275,915	\$111,629	\$108,157	\$166,195	\$144,643	--
<i>Annual Change</i>	--	23.6%	-59.5%	-3.1%	53.7%	-13.0%	-8.3%
Fringe Benefits (a)	\$152,443	\$209,297	\$66,115	\$56,937	\$90,949	\$79,063	--
<i>Annual Change</i>	--	37.3%	-68.4%	-13.9%	59.7%	-13.1%	-12.3%
Materials/Supplies (b)	\$1,676	\$0	\$288	\$1,657	\$0	\$14,304	--
<i>Annual Change</i>	--	-100.0%	--	475.3%	-100.0%	--	53.5%
Utilities	\$806,492	\$773,392	\$852,720	\$977,425	\$954,658	\$1,069,572	--
<i>Annual Change</i>	--	-4.1%	10.3%	14.6%	-2.3%	12.0%	5.8%
Casualty/Liability	\$86,850	\$88,410	\$95,922	\$130,209	\$126,141	\$126,093	--
<i>Annual Change</i>	--	1.8%	8.5%	35.7%	-3.1%	0.0%	7.7%
Purchased Transp.	\$6,467,549	\$6,501,843	\$6,878,512	\$7,102,231	\$7,545,095	\$7,273,331	--
<i>Annual Change</i>	--	0.5%	5.8%	3.3%	6.2%	-3.6%	2.4%
Services/Other Exp. (c)	\$0	\$0	\$0	\$1,045	\$703	\$629	--
<i>Annual Change</i>	--	--	--	--	-32.7%	-10.5%	--
Total	\$7,738,282	\$7,848,857	\$8,005,186	\$8,377,661	\$8,883,741	\$8,707,635	--
<i>Annual Change</i>	--	1.4%	2.0%	4.7%	6.0%	-2.0%	2.4%
OPERATING STATISTICS							
Vehicle Service Hours	19,172	17,819	19,787	20,044	19,949	19,686	--
<i>Annual Change</i>	--	-7.1%	11.0%	1.3%	-0.5%	-1.3%	0.5%

(a) Also includes paid absences

(b) Includes fuel/lubricants, tires/tubes, and other materials/supplies

(c) Includes services, taxes, and miscellaneous expenses

Exhibit 5.5: Distribution of Component Costs – Automated People Mover
Operating Cost per Car Service Hour



Hybrid Rail Performance Trends

This section provides an overview of the performance of BART's hybrid rail service over the six-year review period. The trends in the TDA indicators and input statistics are presented in Exhibit 6. The six-year trends are illustrated in Exhibits 6.1 through 6.4.

- Operating Cost per Car Service Hour (Exhibit 6.1)
 - The cost per hour of hybrid rail service increased an average of 8.3 percent annually, as car service hours went up by 1.1 percent per year overall while operating costs increased by 9.5 percent.
 - The cost per hour ranged from a period low of \$328.82 in FY2021 (the first full year of the COVID pandemic) to a high of \$568.13 in FY2023.
 - After FY2021, there were major increases in the next two years, followed by relatively small changes in FY2024 and FY2025, as recovery from the pandemic proceeded.
 - In constant FY2020 dollars, there was still an average annual increase in this indicator, amounting to 4.4 percent.
- Passengers per Car Service Hour (Exhibit 6.2)
 - Hybrid rail passengers per hour decreased an average 5.6 percent annually during the six-year period.
 - A 65 percent reduction in passengers in the first full year of the pandemic (FY2021) resulted in a major drop from 42 to just 15 passengers per hour in that year.
 - A subsequent turnaround led to 27 passengers per hour recorded in FY2022, followed by an increase to 36 passengers in FY2023, but some reversal again to just 31 passengers in the last two years.
- Passengers per Car Service Mile (Exhibit 6.2)
 - Similar to passengers per hour, hybrid rail passengers per mile decreased noticeably overall, by nearly four percent annually on average.

- There were about 1.5 passengers per mile in the first year, followed by a precipitous 58 percent decrease to just 0.6 passengers in FY2021.
- The trend was driven by major decreases in passengers coinciding with the first full year of the COVID pandemic.
- This was followed by a recovery to 0.9 passengers per mile in FY2022, and some further improvement in each subsequent year.
- Operating Cost per Passenger (Exhibit 6.3)
 - The hybrid rail cost per passenger increased an average of 14.7 percent annually, as passengers went down by 4.5 percent per year overall while operating costs increased by 9.5 percent.
 - The cost per passenger ranged from a period low of \$8.96 in FY2020, all the way up to a high of \$21.94 in FY2021, coinciding with the COVID pandemic.
 - After FY2021, the cost per passenger leveled out and varied from year to year in a range of \$16 to \$18.
 - In constant FY2020 dollars, there was still an average annual increase in this indicator of nearly 11 percent.
- Car Service Hours per FTE (Exhibit 6.4)
 - Car service hours per hybrid rail employee decreased on average by five percent per year over the six years.
 - Higher employee productivity (in a range of 670 to 750 hours per FTE) was recorded in FY2020 and FY2021, when the impact of the COVID pandemic was most pronounced.
 - In the last three years, results were down to about 500 hours per FTE.

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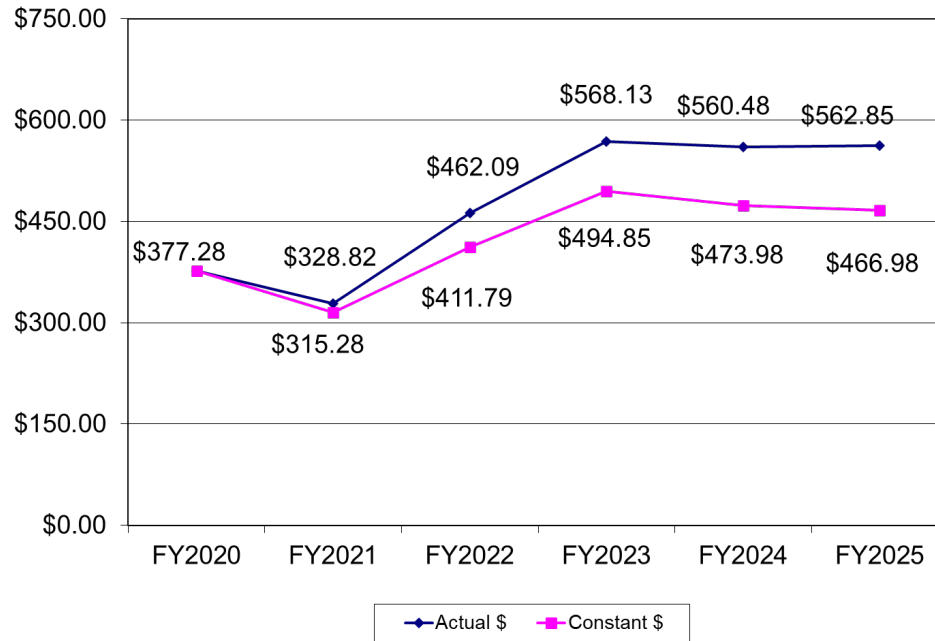
The following is a brief summary of the hybrid rail TDA performance trend highlights over the six-year period of FY2020 through FY2025:

- There was an average annual increase in the operating cost per hour of 8.3 percent, or 4.4 percent in inflation adjusted dollars. After FY2021, there were major increases in the next two years, followed by relatively small changes in FY2024 and FY2025.
- Passenger productivity showed notable decline, with passengers per car service hour decreasing by 5.6 percent per year overall, and passengers per car service mile by nearly four percent. These trends were driven by major decreases in passengers in FY2021, the first full year of the COVID pandemic, but substantial rebounding subsequently.
- The cost per passenger increased on average by 14.7 percent per year, which, when measured in constant FY2020 dollars, resulted in an average annual increase of nearly 11 percent. This trend was significantly impacted by COVID related ridership declines in FY2021. Subsequently, the cost per passenger leveled out in a range of \$16 to \$18.
- Employee productivity decreased on average by five percent per year. Higher employee productivity was recorded in FY2020 and FY2021, when the impact of the COVID pandemic was most pronounced.

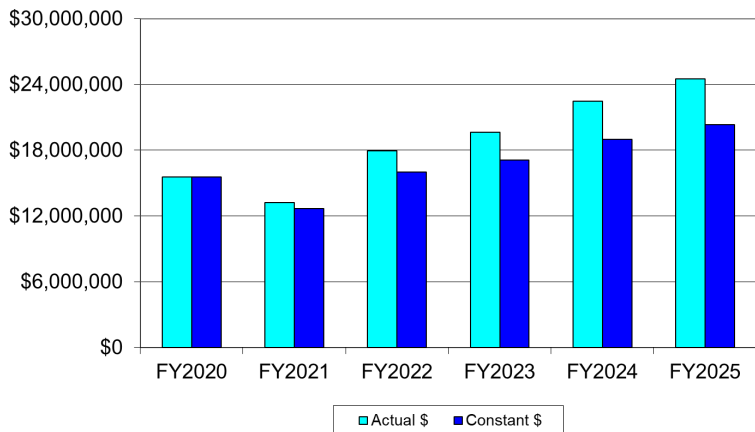
Exhibit 6: TDA Indicator Performance – Hybrid Rail

	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Avg. Annual Change
Op. Cost per Car Svc. Hour (Actual \$)	\$377.28	\$328.82	\$462.09	\$568.13	\$560.48	\$562.85	- -
<i>Annual Change</i>	- -	-12.8%	40.5%	22.9%	-1.3%	0.4%	8.3%
Op. Cost per Car Svc. Hour (Constant \$)	\$377.28	\$315.28	\$411.79	\$494.85	\$473.98	\$466.98	- -
<i>Annual Change</i>	- -	-16.4%	30.6%	20.2%	-4.2%	-1.5%	4.4%
Passengers per Car Service Hour	42.1	15.0	27.6	36.6	31.8	31.6	- -
<i>Annual Change</i>	- -	-64.4%	84.0%	32.8%	-13.2%	-0.4%	-5.6%
Passengers per Car Service Mile	1.47	0.62	0.95	1.06	1.14	1.20	- -
<i>Annual Change</i>	- -	-58.0%	53.5%	12.2%	7.8%	5.0%	-3.9%
Op. Cost per Passenger (Actual \$)	\$8.96	\$21.94	\$16.76	\$15.52	\$17.64	\$17.80	- -
<i>Annual Change</i>	- -	144.8%	-23.6%	-7.4%	13.7%	0.9%	14.7%
Op. Cost per Passenger (Constant \$)	\$8.96	\$21.04	\$14.94	\$13.52	\$14.92	\$14.77	- -
<i>Annual Change</i>	- -	134.8%	-29.0%	-9.5%	10.4%	-1.0%	10.5%
Car Service Hours per FTE	671.3	753.2	622.6	505.2	498.7	518.9	- -
<i>Annual Change</i>	- -	12.2%	-17.3%	-18.9%	-1.3%	4.1%	-5.0%
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

Exhibit 6.1: Operating Cost per Car Service Hour– Hybrid Rail



Operating Cost



Car Service Hours

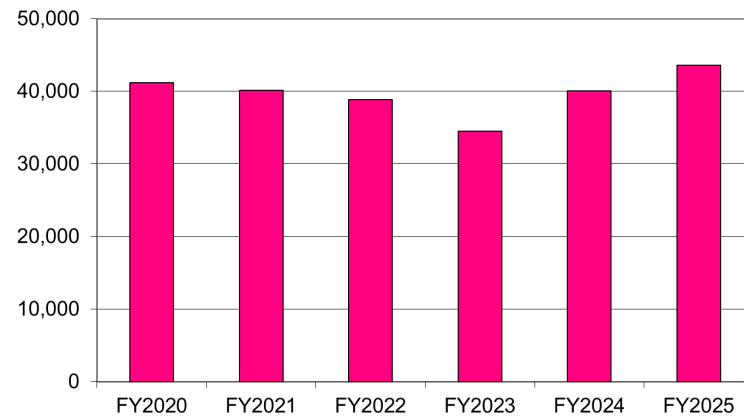
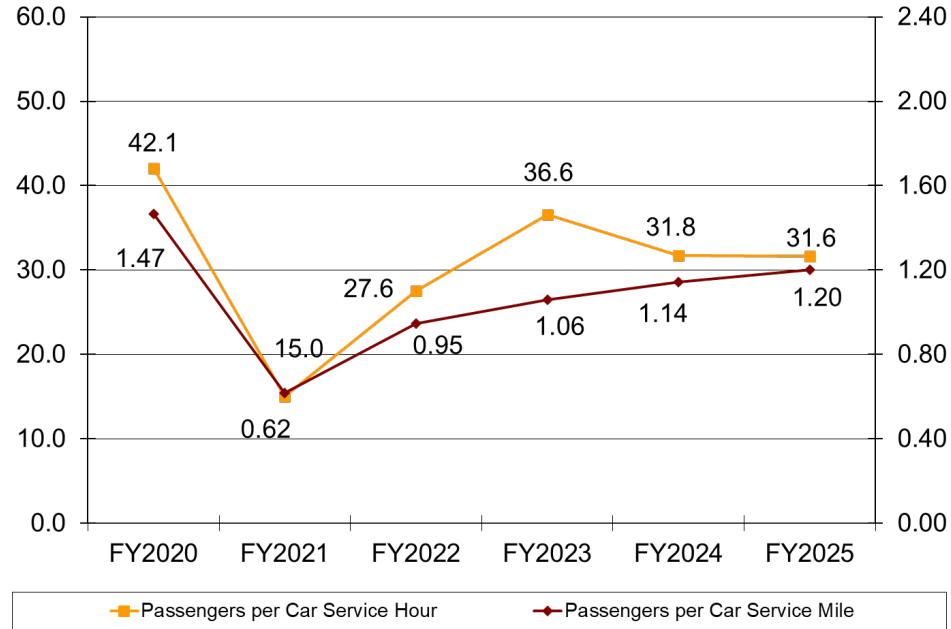
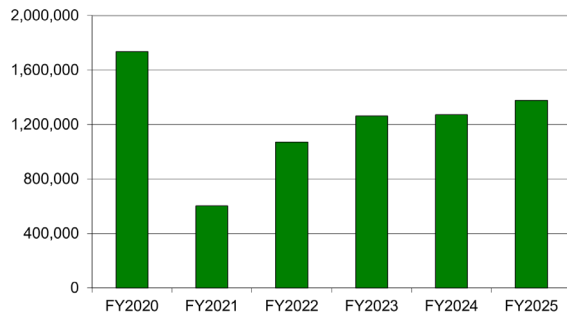


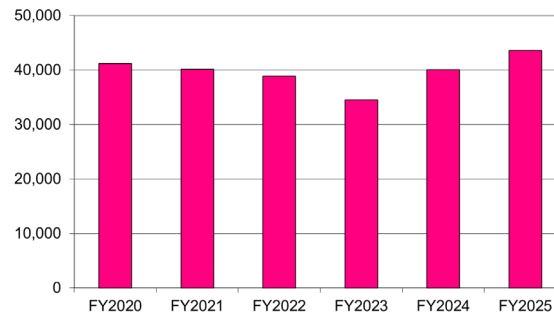
Exhibit 6.2: Passengers per Car Service Hour and Mile – Hybrid Rail



Unlinked Passengers



Car Service Hours



Car Service Miles

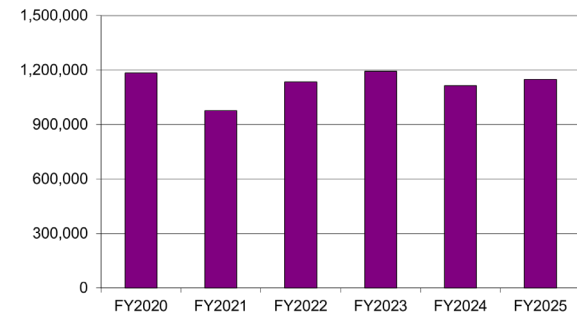
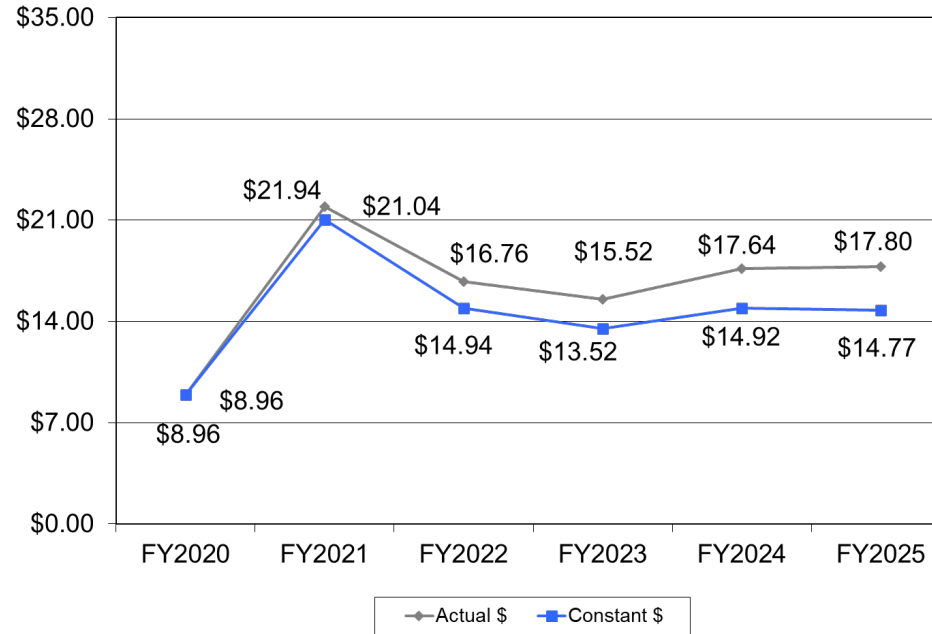
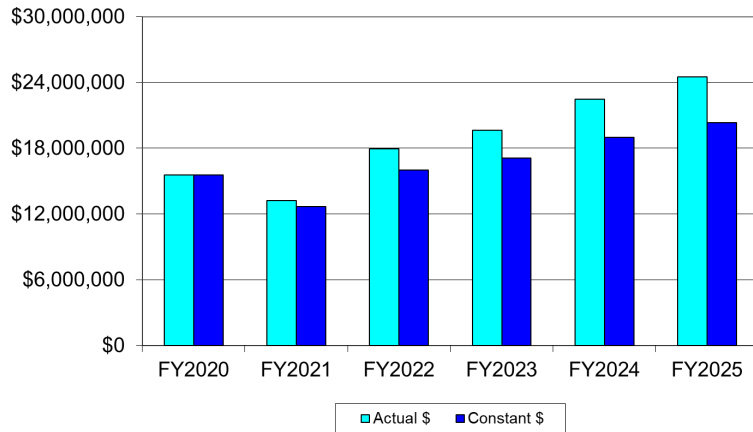


Exhibit 6.3: Operating Cost per Passenger – Hybrid Rail



Operating Cost



Unlinked Passengers

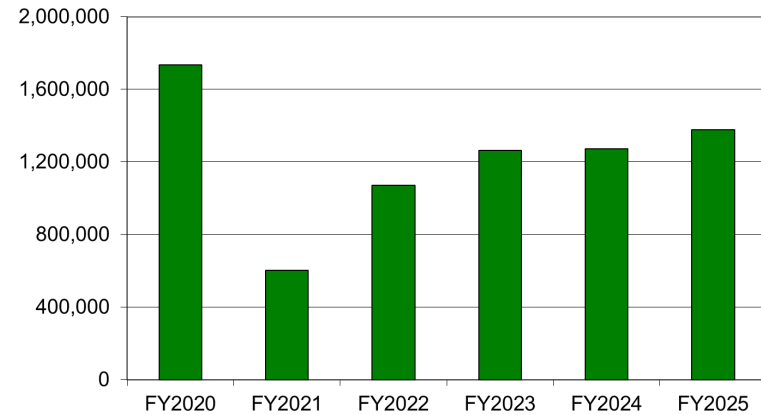
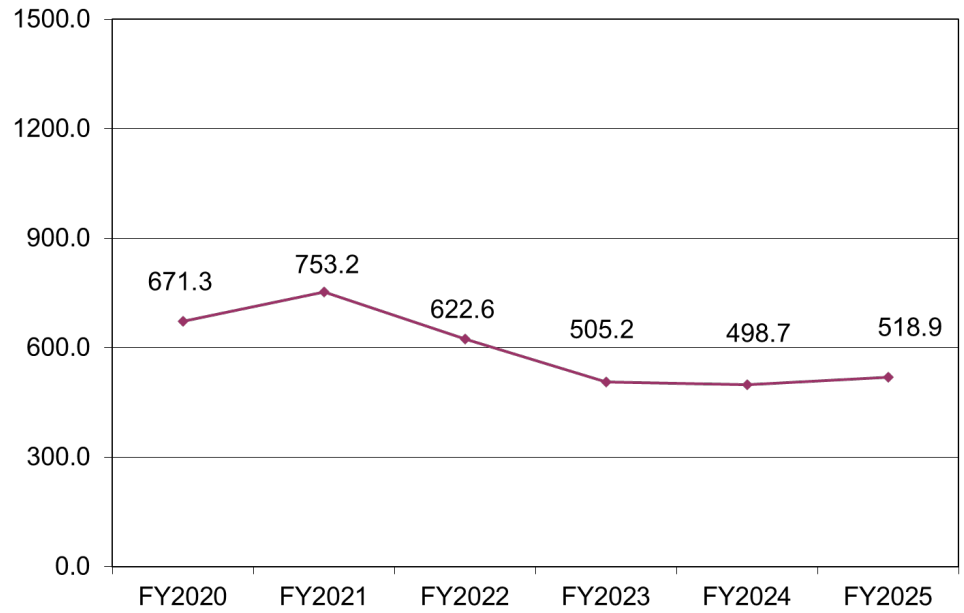
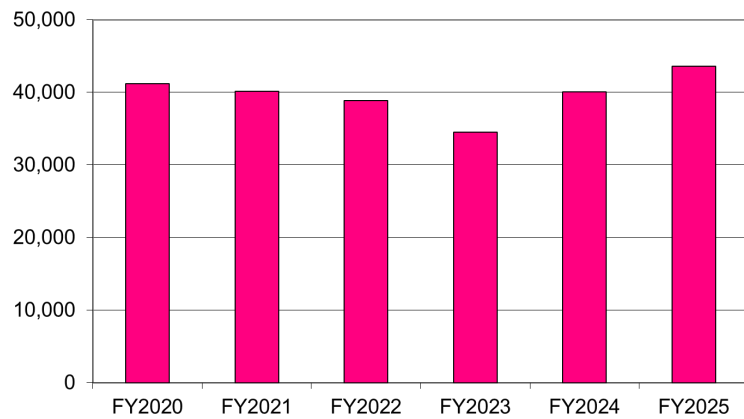


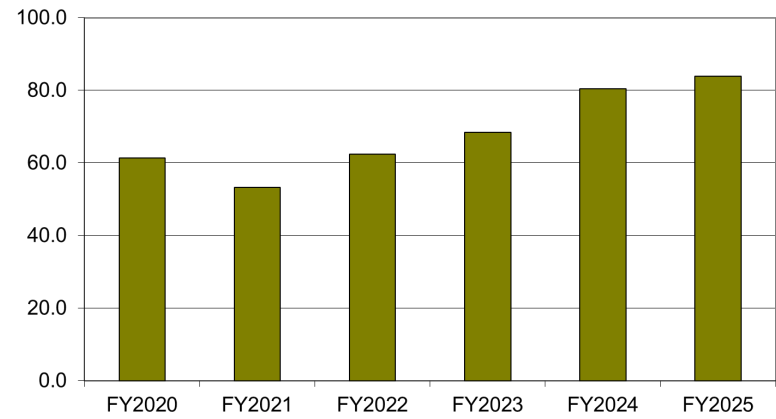
Exhibit 6.4: Car Service Hours per FTE – Hybrid Rail



Car Service Hours



Full-time Equivalents



Hybrid Rail Component Costs

The year-to-year changes in selected hybrid rail operating cost categories are presented in Exhibit 6.5, along with the concurrent changes in car service hours. The portions of the cost per car service hour that can be attributed to each included cost component are shown in Exhibit 6.6.

- Labor costs contributed just under half of total operating costs through the period, while fringe benefits costs were responsible for about another third.
- Labor costs and fringe benefits costs both increased on average per year, by 8.3 percent and 11.4 percent, respectively.
- Services costs decreased by less than one percent on average per year, with the share of total costs between four and six percent in the first two years but less than three percent thereafter.
- Materials/supplies costs went up by 12.4 percent on average per year, decreasing only in FY2021. Meanwhile, the share of total costs increased from 14 to 16 percent in the first three years to about 19 percent in the last three years.
- Utilities and casualty/liability costs together consistently accounted for just two percent or less of total costs. The former decreased by 13.6 percent annually, on average, while the latter decreased by 6.6 percent.
- The most significant change during the period was an average annual increase of 48.7 percent in the “other expenses” area. However, these costs constituted well under one percent of total costs in every year.

* * * * *

The following is a brief summary of the hybrid rail component operating costs trend highlights between FY2020 and FY2025:

- Labor costs contributed just under half of total operating costs, and fringe benefits costs another third. Both increased on average per year, by 8.3 percent and 11.4 percent.
- Services costs decreased slightly overall, with the share of total costs dropping to less than three percent in the last three years. At the same time, materials/supplies costs went up by 12.4 percent, and the share of total costs increased to about 19 percent.
- Utilities and casualty/liability costs together consistently accounted for just two percent or less of total costs. In addition, “other expenses” increased by 48.7 percent per year, but constituted well under one percent of total costs.

Exhibit 6.5: Component Cost Trends – Hybrid Rail

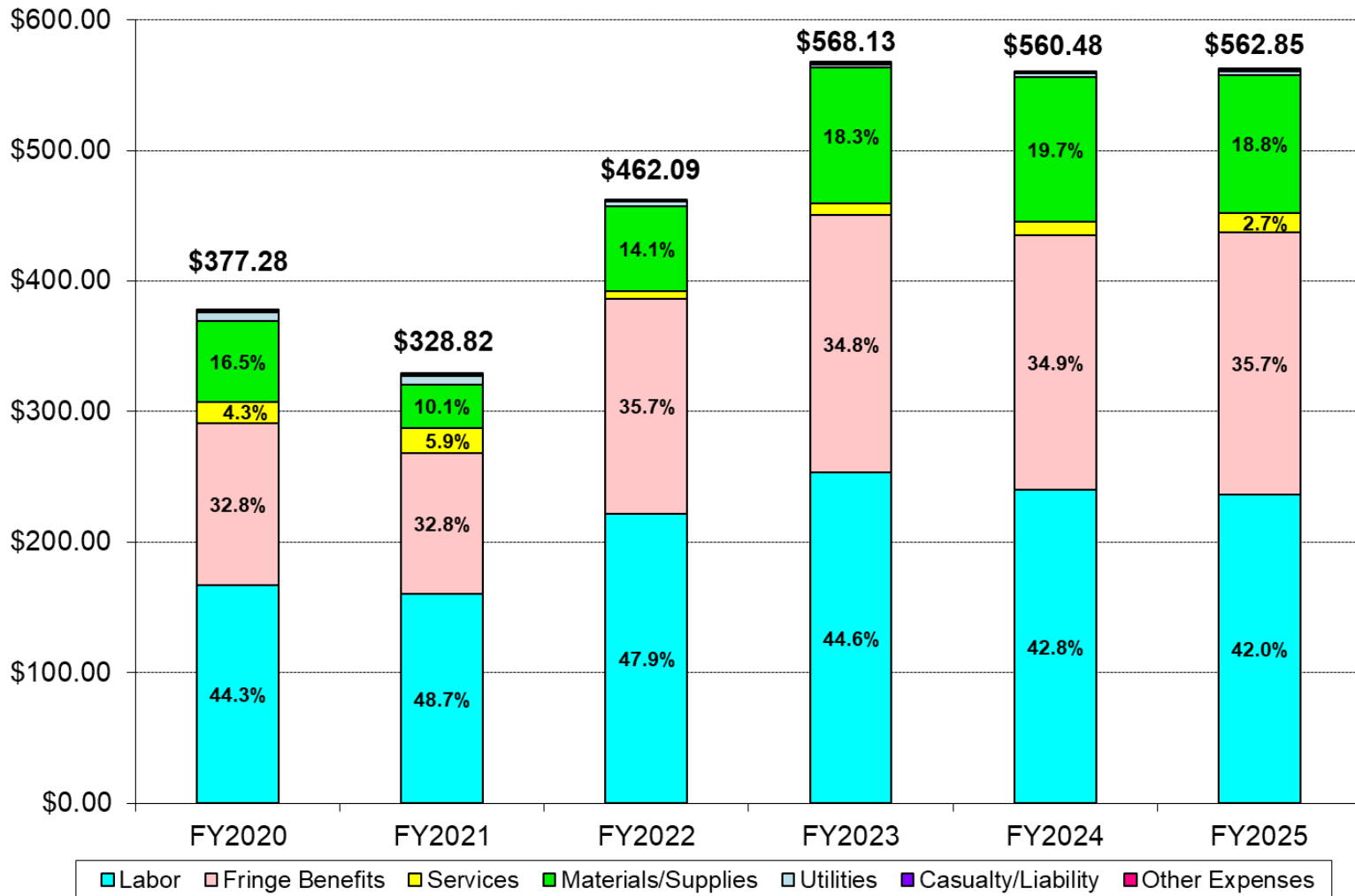
	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
COST CATEGORIES							
Labor (Salaries/Wages)	\$6,895,576	\$6,431,827	\$8,611,031	\$8,739,687	\$9,610,475	\$10,291,124	--
<i>Annual Change</i>	--	-6.7%	33.9%	1.5%	10.0%	7.1%	8.3%
Fringe Benefits (a)	\$5,096,758	\$4,333,189	\$6,418,184	\$6,825,239	\$7,836,374	\$8,756,479	--
<i>Annual Change</i>	--	-15.0%	48.1%	6.3%	14.8%	11.7%	11.4%
Services	\$672,932	\$776,669	\$219,982	\$296,426	\$418,985	\$649,816	--
<i>Annual Change</i>	--	15.4%	-71.7%	34.8%	41.3%	55.1%	-0.7%
Materials/Supplies (b)	\$2,569,700	\$1,327,955	\$2,533,797	\$3,599,332	\$4,417,621	\$4,606,392	--
<i>Annual Change</i>	--	-48.3%	90.8%	42.1%	22.7%	4.3%	12.4%
Utilities	\$264,506	\$269,193	\$124,406	\$74,298	\$130,946	\$127,291	--
<i>Annual Change</i>	--	1.8%	-53.8%	-40.3%	76.2%	-2.8%	-13.6%
Casualty/Liability	\$44,307	\$44,205	\$47,961	\$63,256	\$31,565	\$31,547	--
<i>Annual Change</i>	--	-0.2%	8.5%	31.9%	-50.1%	-0.1%	-6.6%
Other Expenses (c)	\$6,952	\$14,966	\$10,046	\$18,821	\$17,595	\$50,529	--
<i>Annual Change</i>	--	115.3%	-32.9%	87.3%	-6.5%	187.2%	48.7%
Total	\$15,550,731	\$13,198,004	\$17,965,407	\$19,617,059	\$22,463,561	\$24,513,178	--
<i>Annual Change</i>	--	-15.1%	36.1%	9.2%	14.5%	9.1%	9.5%
OPERATING STATISTICS							
Car Service Hours	41,218	40,138	38,879	34,529	40,079	43,552	--
<i>Annual Change</i>	--	-2.6%	-3.1%	-11.2%	16.1%	8.7%	1.1%

(a) Also includes paid absences

(b) Includes fuel/lubricants, tires/tubes, and other materials/supplies

(c) Includes taxes and miscellaneous expenses

Exhibit 6.6: Distribution of Component Costs – Hybrid Rail
Operating Cost per Car Service Hour



IV. COMPLIANCE WITH PUC REQUIREMENTS

An assessment of BART's compliance with selected sections of the state Public Utilities Code (PUC) has been performed. The compliance areas included in this review are those that MTC has identified for inclusion in the triennial performance audit. Other statutory and regulatory compliance requirements are reviewed by MTC in conjunction with its annual review of BART's TDA-STA claim application.

The results from this review are detailed by individual requirement in Exhibit 7. BART is in compliance with six of the seven sections of the state PUC that were reviewed as part of this performance audit. These sections included requirements concerning labor contracts, reduced fares, Welfare-to-Work, revenue sharing, and evaluating passenger needs. As a rapid rail operator, the additional PUC requirement concerning CHP terminal safety inspections is not applicable to BART.

Exhibit 7: Compliance with State PUC Requirements

Code Reference	Operator Compliance Requirements	Compliance Finding	Verification Information
PUC99251	<u>CHP Certification</u> - The CHP has, within the 13 months prior to each TDA claim submitted by an operator, certified the operator's compliance with Vehicle Code Section 1808 following a CHP inspection of the operator's terminal	Not Applicable	BART is a rapid rail system. This requirement does not apply.
PUC99264	<u>Operator-to-Vehicle Staffing</u> - The operator does not routinely staff with two or more persons public transportation vehicles designed to be operated by one person	In Compliance	No provision for excess staffing in Agreement with ATU Local 1555, effective 07/01/21.
PUC99314.5(e) (1)(2)	<u>Part-Time Drivers and Contracting</u> - If the operator receives STA funds, the operator is not precluded by contract from employing part-time drivers or from contracting with common carriers.	In Compliance	<u>Part Time Train Operators and Station Agents</u> - Section 44.0 of Agreement with ATU Local 1555, effective 07/01/21. <u>Contracting</u> – Allowances for contracting activities established in Section 1.8 of Agreement with ATU Local 1555, effective 07/01/21; and Section 1.8 of Labor Agreement with SEIU Local 1021, effective 07/01/21.
PUC99155	<u>Reduced Fare Eligibility</u> - For any operator who received TDA Article 4 funds, if the operator offers reduced fares to senior citizens and disabled persons, applicant will honor the federal Medicare identification card, the California Department of Motor Vehicles disability ID card, the Regional Transit Connection Discount Card, or any other current identification card issued by another transit operator	In Compliance	Fares / Clipper Cards sections on BART's web site.

Code Reference	Operator Compliance Requirements	Compliance Finding	Verification Information
	that is valid for the type of transportation service or discount requested; and if the operator offers reduced fares to senior citizens, it also offers the same reduced fare to disabled patrons		
PUC99155.1(a) (1)(2)	<u>Welfare-to-Work</u> - The operator coordinates with county welfare departments in order to ensure that transportation moneys available for purposes of assisting recipients of aid are expended efficiently for the benefit of that population; if a recipient of CalWORKs program funds by the county, the operator shall give priority to the enhancement of public transportation services for welfare-to-work purposes and to the enhancement of transportation alternatives, such as, but not limited to, subsidies or vouchers, van pools, and contract paratransit operations, in order to promote welfare-to-work purposes.	In Compliance	BART is a stakeholder in the MTC Coordinated Public Transit-Human Services Transportation Plan, to better meet the transportation needs of older adults, people with disabilities and populations with low incomes. The plan is directed by MTC as the RTAP and MPO for the Bay Area. The most recent Coordination Plan update was completed and adopted in December 2024.
PUC99314.7, Govt Code 66516, MTC Res. Nos. 3837, 4073	<u>Joint Revenue Sharing Agreement</u> - The operator has current joint fare revenue sharing agreements in place with transit operators in the MTC region with which its service connects, and submitted copies of agreements to MTC	In Compliance	Clipper Agreement (with AC Transit, GGBHTD, SFMTA, SamTrans, Caltrain, CCCTA, FAST, Petaluma, ECCTA, LAVTA, MCTD, NVTA, SolTrans, SCT, SMART, Vacaville, VTA, WCCTA, WETA, Santa Rosa, Union City). RTC Agreement (with AC Transit, GGBHTD, SFMTA, SamTrans, Caltrain, CCCTA, Petaluma, ECCTA, LAVTA, SolTrans, SCT, STA, Santa Rosa, VTA).

Code Reference	Operator Compliance Requirements	Compliance Finding	Verification Information
			<p>Special Transit Fare (Fast Pass) Agreement with SFMTA.</p> <p>Daly City Transfer Agreement with SFMTA.</p>
PUC99246(d)	<p><u>Process for Evaluation of Passenger Needs</u> - The operator has an established process in place for evaluating the needs and types of passengers being served</p>	<p>In Compliance</p>	<p>Title VI Policy</p> <p>Public Participation Procedures Manual</p> <p>Discussion in the latest Short Range Transit Plan (Reimagined SRTP - FY2023)</p> <p>Biennial Customer Satisfaction Survey Reports (for FY2022 and FY2024 Surveys)</p> <p>Passenger Environment Survey (PES)</p> <p>Quarterly Service Performance Reviews (QPRs)</p> <p>Station Profile Survey (conducted every 7-10 years, most recently in 2024)</p>

V. STATUS OF PRIOR AUDIT RECOMMENDATIONS

BART's prior performance audit was completed in June 2024. Generally, MTC has used the audit recommendations as the basis for developing the Productivity Improvement Program (PIP) projects the operator is required to complete. MTC tracks PIP project implementation as part of its annual review of the operator's TDA-STA claim application. This section provides an assessment of actions taken by TDA-STA recipients toward implementing the recommendations advanced in the prior audit. This assessment provides continuity between the current and prior audits, which allows MTC to fulfill its obligations where the recommendations were advanced as PIP projects.

This review would address BART's responses to the recommendations made in the prior performance audit, and whether BART made reasonable progress toward their implementation. However, there were no recommendations made in BART's prior audit.

VI. FUNCTIONAL PERFORMANCE INDICATOR TRENDS

To further assess BART's performance over the past three years, a detailed set of functional area performance indicators was defined. This assessment consists of a three-year trend analysis of the functions in each of the following areas:

- Management, Administration and Marketing
- Service Planning
- Operations
- Maintenance
- Safety

The indicators selected for this analysis were primarily those that were tracked regularly by BART or for which input data were maintained by BART on an on-going basis, such as performance reports, contractor reports, annual financial reports, and NTD reports. As such, there may be some overlap with the TDA indicators examined earlier in the audit process, but most indicators will be different. Some indicators were selected from the California Department of Transportation's Performance Audit Guidebook for Transit Operators and Regional Transportation Planning Entities as being appropriate for this evaluation. The input statistics for the indicators, along with their sources, are contained in Appendix A at the end of this report.

The trends in performance are presented over the three-year audit period to give an indication of which direction performance is moving for these indicators. The remainder of this section presents the findings from this review. The discussion presents the highlights of performance systemwide or by mode, each followed by an exhibit illustrating the indicators by function as applicable.

Systemwide (All Modes)

For the purposes of this review, BART's functional indicators relating to Management, Administration and Marketing have been included on a systemwide basis. Systemwide audit period performance is discussed below and presented in Exhibit 8.

- Administrative costs increased from 24 percent of total operating costs in the first year to 26 percent thereafter. This amounted to a ten percent increase overall.
- Administrative costs increased substantially from about \$68 per car service hour in the first year to \$98 in the second year, followed by a further increase to \$108 per hour in FY2025. This amounted to an increase of nearly 60 percent over the three years, as administrative costs rose continually even as car service hours decreased in each year.
- The portion of administrative costs attributed to marketing activities decreased from 2.1 percent in FY2023 to 1.6 percent in FY2025. In terms of passenger trips, marketing costs decreased by 12.5 percent over the period, from eight cents to seven cents per trip.
- The systemwide farebox recovery ratio increased steadily, from 24 percent in the first year to more than 26 percent in the last year.

* * * * *

The following is a brief summary of the systemwide functional trend highlights between FY2023 and FY2025:

- Administrative costs compared to total costs increased by ten percent and compared to car service hours by nearly 60 percent.
- Marketing costs decreased somewhat compared to both total administrative costs and passenger trips.
- The systemwide farebox recovery ratio increased from 24 percent to more than 26 percent.

Exhibit 8: Functional Performance Trends – Systemwide (All Modes)

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
MANAGEMENT, ADMINISTRATION & MARKETING			
Administrative Cost/Total Operating Cost	23.7%	25.8%	26.2%
<i>Annual Percent Change</i>	--	9.0%	1.3%
<i>Three Year Percent Change</i>	--	--	10.5%
Administrative Cost/Car Service Hour	\$68.07	\$97.78	\$108.00
<i>Annual Percent Change</i>	--	43.7%	10.5%
<i>Three Year Percent Change</i>	--	--	58.7%
Marketing Cost/Total Administrative Cost	2.06%	1.79%	1.60%
<i>Annual Percent Change</i>	--	-13.2%	-10.7%
<i>Three Year Percent Change</i>	--	--	-22.5%
Marketing Cost/Unlinked Passenger Trip	\$0.08	\$0.07	\$0.07
<i>Annual Percent Change</i>	--	-1.3%	-11.3%
<i>Three Year Percent Change</i>	--	--	-12.5%
Farebox Revenue/Operating Cost	24.0%	24.7%	26.4%
<i>Annual Percent Change</i>	--	3.0%	7.0%
<i>Three Year Percent Change</i>	--	--	10.2%

Heavy Rail

BART's heavy rail functional area trends represent areas of cost efficiency, safety, productivity, and service reliability. Audit period performance is discussed below and presented in Exhibit 9.

- Service Planning
 - Operating costs per passenger mile remained in a range of \$1.12 to \$1.15 through the audit period.
 - The portion of car miles traveled that were in service remained at about 97 percent.
 - The portion of car hours in service also remained at about 97 percent.
- Operations
 - Vehicle operations costs decreased from about 41 percent of total operating costs in the first two years to 39 percent by FY2025.
 - Vehicle operations costs per service hour rose from \$1.18 in FY2023 to \$1.54 in FY2024 (30 percent) and then went up to \$1.61 in the last year (another 4.5 percent). These results reflect vehicle operations costs generally increasing even as car service hours decreased in each year.
 - Similar to the systemwide results discussed previously, the heavy rail farebox recovery ratio increased steadily, from 24 percent in the first year to more than 26 percent in the last year.
 - Operator scheduled absences remained at about 15 percent of total hours worked through the period, while unscheduled absences decreased from 19.6 percent to 13.7 percent at the same time.
 - Heavy rail on-time performance was just above 70 percent of trips in FY2023 and FY2025, with slightly higher results in the interim year. However, BART provided evidence (very recent press release and Quarterly Performance Report) that details significant improvements in service reliability in FY2026, resulting from a series of operational initiatives. Notably, the latest available train on-time rate is 84.2 percent.

- The rate of heavy rail related complaints was about ten per 100,000 passengers in the first two years but reduced to eight in FY2025. Overall, the complaint rate decreased by 20 percent during the period.
- The incidence of missed trips was reduced from more than four percent in the first year to about one percent subsequently.
- Maintenance
 - Total maintenance costs (vehicle plus non-vehicle) remained at about 33 percent of total operating costs during the audit period.
 - Vehicle maintenance costs per service mile increased by 40 percent over the audit period, from \$1.50 in FY2023 to \$2.10 in the last year.
 - Maintenance pay hours rose from about 60 percent of car service hours in the first year to 70 percent by FY2025.
 - Maintenance employee scheduled absences decreased steadily through the period, from 23 percent of total hours to 18 percent. Meanwhile, unscheduled absences remained at about ten percent in each year.
 - The heavy rail car spare ratio varied significantly from year to year, from 36 percent in the first year down to 25 percent in FY2024 and then reaching over 50 percent in FY2025. The latter corresponds with full delivery of the new, larger “Fleet of the Future”, as described in BART’s most recent Rail Fleet Management Plan update (2023), combined with somewhat reduced service levels and shorter trains compared with immediate post-COVID operations.
 - The mean distance between major failures improved overall, most notably by more than 80 percent between FY2023 and FY2024. A similar and even more pronounced trend was observed when looking at all failures, with a 100 percent annual improvement in FY2024.
- Safety
 - The rate of preventable accidents increased in each year, rising from 0.65 per 100,000 miles traveled in the first year to 0.83 in FY2025 (27 percent). These results relate to all preventable accidents, not just those in revenue service.

- Casualty/liability costs per service hour and mile both jumped by about 140 percent between FY2023 and FY2024 and then were reduced by 17 percent in FY2025.
- There were fewer days lost due to industrial accidents in each year, with an overall reduction of 32.5 percent during the period.

* * * * *

The following is a brief summary of the heavy rail functional trend highlights between FY2023 and FY2025:

- For service planning, the operating cost per passenger mile remained in a range of \$1.12 to \$1.15, while the portion of car miles and hours in service remained at about 97 percent through the period.
- For operations, the vehicle operations cost per total operating cost decreased but remained near 40 percent, while vehicle operations costs per car service hour increased noticeably from \$1.18 to \$1.61, but the farebox recovery ratio increased from 24 percent to more than 26 percent. Operator scheduled absences remained at about 15 percent of total hours worked, while unscheduled absences decreased from 19.6 to 13.7 percent. Schedule adherence was just 70 percent or somewhat higher, but BART provided evidence of significant improvement through various operational initiatives to 84.2 percent in FY2026 (after the audit period). Meanwhile, the rate of complaints decreased by 20 percent in the last year, and about four percent of total trips were missed in the first year, down to one percent thereafter.
- In the maintenance area, maintenance costs per total operating costs remained steady at 33 percent, while vehicle maintenance costs per service mile increased overall by 40 percent. Maintenance pay hours rose from 60 to 70 percent of car service hours by FY2025. Maintenance employee scheduled absences decreased steadily to 18 percent of total hours, while unscheduled absences remained at about ten percent. The vehicle spare ratio varied from 25 percent in FY2024 to over 50 percent in FY2025. The mean distance between major failures improved overall, especially by 80 percent between FY2023 and FY2024, and this trend was even more pronounced for all failures.

- In the safety area, the rate of preventable accidents per 100,000 miles increased by 27 percent overall. At the same time, casualty and liability costs per car service hour and mile increased by 140 percent in FY2024 but were then reduced by 17 percent in FY2025. Lost days due to industrial accidents decreased by 32.5 percent over the period.

Exhibit 9: Functional Performance Trends – Heavy Rail

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
SERVICE PLANNING			
Total Operating Cost/Passenger Mile	\$1.12	\$1.15	\$1.12
<i>Annual Percent Change</i>	--	2.2%	-2.8%
<i>Three Year Percent Change</i>	--	--	-0.7%
Car Service Miles/Total Miles	97.1%	97.1%	96.6%
<i>Annual Percent Change</i>	--	0.1%	-0.5%
<i>Three Year Percent Change</i>	--	--	-0.5%
Car Service Hours/Total Hours	97.4%	97.9%	97.8%
<i>Annual Percent Change</i>	--	0.4%	0.0%
<i>Three Year Percent Change</i>	--	--	0.4%
OPERATIONS			
Vehicle Operations Cost/Total Operating Cost	41.9%	41.2%	39.4%
<i>Annual Percent Change</i>	--	-1.6%	-4.3%
<i>Three Year Percent Change</i>	--	--	-5.8%
Vehicle Operations Cost/Car Service Hour	\$118.32	\$154.36	\$161.31
<i>Annual Percent Change</i>	--	30.5%	4.5%
<i>Three Year Percent Change</i>	--	--	36.3%
Farebox Revenue/Operating Cost	24.0%	24.9%	26.7%
<i>Annual Percent Change</i>	--	3.5%	7.4%
<i>Three Year Percent Change</i>	--	--	11.1%
Operator Sched. Absences/Total Hours Worked	15.2%	14.2%	15.7%
<i>Annual Percent Change</i>	--	-6.3%	10.8%
<i>Three Year Percent Change</i>	--	--	3.9%
Operator Unsched. Absences/Total Hours Worked	19.6%	17.6%	13.7%
<i>Annual Percent Change</i>	--	-9.9%	-22.3%
<i>Three Year Percent Change</i>	--	--	-30.0%
Trips On-Time/Total Trips	70.3%	76.9%	71.3%
<i>Annual Percent Change</i>	--	9.5%	-7.4%
<i>Three Year Percent Change</i>	--	--	1.4%
Complaints/100,000 Passenger Trips	10.03	10.74	7.99
<i>Annual Percent Change</i>	--	7.1%	-25.6%
<i>Three Year Percent Change</i>	--	--	-20.4%
Missed Trips/Total Trips	4.4%	1.0%	1.5%
<i>Annual Percent Change</i>	--	-78.0%	51.5%
<i>Three Year Percent Change</i>	--	--	-66.7%

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
MAINTENANCE			
Vehicle + Non-Veh. Maint. Cost/Total Operating Cost	34.0%	32.4%	33.7%
<i>Annual Percent Change</i>	--	-4.6%	4.1%
<i>Three Year Percent Change</i>	--	--	-0.6%
Vehicle Maintenance Cost/Car Service Mile	\$1.50	\$1.95	\$2.10
<i>Annual Percent Change</i>	--	29.8%	7.6%
<i>Three Year Percent Change</i>	--	--	39.7%
Maintenance Pay Hours/Car Service Hours	58.6%	67.5%	70.4%
<i>Annual Percent Change</i>	--	15.1%	4.3%
<i>Three Year Percent Change</i>	--	--	20.0%
Maintenance Employee Scheduled Absences	22.6%	21.2%	18.3%
<i>Annual Percent Change</i>	--	-6.3%	-13.7%
<i>Three Year Percent Change</i>	--	--	-19.1%
Maintenance Employee Unscheduled Absences	9.8%	9.2%	10.0%
<i>Annual Percent Change</i>	--	-5.7%	9.0%
<i>Three Year Percent Change</i>	--	--	2.7%
Spare Vehicles/Total Vehicles	36.2%	25.3%	53.6%
<i>Annual Percent Change</i>	--	-30.0%	111.6%
<i>Three Year Percent Change</i>	--	--	48.1%
Mean Distance between Major Failures (Miles)	240,408	435,186	352,350
<i>Annual Percent Change</i>	--	81.0%	-19.0%
<i>Three Year Percent Change</i>	--	--	46.6%
Mean Distance between All Failures (Miles)	141,024	282,373	271,774
<i>Annual Percent Change</i>	--	100.2%	-3.8%
<i>Three Year Percent Change</i>	--	--	92.7%
SAFETY			
Preventable Accidents/100,000 Car Miles	0.65	0.72	0.83
<i>Annual Percent Change</i>	--	10.9%	14.4%
<i>Three Year Percent Change</i>	--	--	26.8%
Casualty & Liability Cost/Car Service Hour	\$6.06	\$14.68	\$12.06
<i>Annual Percent Change</i>	--	142.1%	-17.8%
<i>Three Year Percent Change</i>	--	--	98.9%
Casualty & Liability Cost/Car Service Mile	\$0.19	\$0.46	\$0.39
<i>Annual Percent Change</i>	--	140.4%	-17.0%
<i>Three Year Percent Change</i>	--	--	99.6%
Lost Days Due to Industrial Accidents	48,043	34,661	32,450
<i>Annual Percent Change</i>	--	-27.9%	-6.4%
<i>Three Year Percent Change</i>	--	--	-32.5%

Automated People Mover

BART's automated people mover functional area performance trends for the audit period are discussed below and presented in Exhibit 10.

- Service Planning
 - The operating cost per passenger mile increased from \$6.00 in the first year to \$6.87 at the end of the period (a 15 percent overall increase).
 - The portions of both car miles and car hours that were in service remained at about 99 percent.
- Operations
 - Vehicle operations costs increased from about 29 percent of total operating costs in the first two years to 31 percent by FY2025.
 - Vehicle operations costs per service hour went up from \$122 in FY2023 to \$132 the next year, and to \$139 in FY2025 (up by 14 percent overall).
 - The farebox recovery ratio decreased in each year, from 34.4 percent in the first year to 31.0 percent the next year, and to 30.5 percent in FY2025.
 - Schedule adherence, measured as cumulative and passenger service availability, remained steady at more than 99 percent.
 - The rate of automated people mover related complaints decreased by 27 percent between FY2023 and FY2024 but then returned almost to the earlier level in FY2025.
- Maintenance
 - Total maintenance costs (vehicle plus non-vehicle) remained between 43 and 45 percent of total operating costs through the audit period.
 - Vehicle maintenance costs per service mile showed a net increase of 14 percent over the period, from \$8.21 in FY2023 up to \$9.36 in the last year.
 - The automated people mover vehicle spare ratio remained at 50 percent throughout the audit period. There were four vehicles in the fleet but only two required to meet scheduled service.

- The mean distance between major failures worsened significantly overall, by 70 percent between FY2023 and FY2024, and another 34 percent in FY2025.
- A declining trend was also observed when looking at all failures, with an 83 percent annual decline in FY2024. There was some improvement in FY2025, however.
- Safety
 - No preventable accidents were recorded in any year by the operating contractor.
 - Casualty/liability costs per car service hour decreased slightly overall (by 1.4 percent, while an increase of less than one percent) per car service mile was recorded.

* * * * *

The following is a brief summary of the automated people mover functional trend highlights between FY2023 and FY2025:

- For service planning, the operating cost per passenger mile increased by 15 percent to \$6.87 in FY2025. Meanwhile, 99 percent of vehicle miles and hours were consistently in service.
- For operations, the vehicle operations cost per total operating cost increased 29 to 31 percent in FY2025, while vehicle operations costs per car service hour increased by 14 percent overall. The farebox recovery ratio decreased from 34.4 percent in FY2023 to about 31 percent subsequently. Cumulative and passenger service availability both remained at more than 99 percent, while the rate of complaints decreased by 27 percent in FY2024 but subsequently returned almost to the FY2023 level.
- In the maintenance area, maintenance costs remained between 43 and 45 percent of total operating costs, while vehicle maintenance costs per car service mile increased by 14 percent. The vehicle spare ratio remained at 50 percent, but the mean distance between major failures worsened

significantly in each year. At the same time, the mean distance between all failures was down by 83 percent in FY2024, though there was some improvement in FY2025.

- For safety, no preventable accidents were recorded in any year, and casualty/liability costs per car service hour and mile both showed only very minor changes overall.

Exhibit 10: Functional Performance Trends – Automated People Mover

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
SERVICE PLANNING			
Total Operating Cost/Passenger Mile	\$6.00	\$6.47	\$6.87
<i>Annual Percent Change</i>	--	7.8%	6.3%
<i>Three Year Percent Change</i>	--	--	14.6%
Car Service Miles/Total Miles	98.74%	98.73%	98.68%
<i>Annual Percent Change</i>	--	0.0%	0.0%
<i>Three Year Percent Change</i>	--	--	-0.1%
Car Service Hours/Total Hours	99.20%	99.19%	99.19%
<i>Annual Percent Change</i>	--	0.0%	0.0%
<i>Three Year Percent Change</i>	--	--	0.0%
OPERATIONS			
Vehicle Operations Cost/Total Operating Cost	29.1%	29.6%	31.4%
<i>Annual Percent Change</i>	--	1.7%	6.2%
<i>Three Year Percent Change</i>	--	--	7.9%
Vehicle Operations Cost/Car Service Hour	\$121.59	\$131.69	\$138.85
<i>Annual Percent Change</i>	--	8.3%	5.4%
<i>Three Year Percent Change</i>	--	--	14.2%
Farebox Revenue/Operating Cost	34.4%	31.0%	30.5%
<i>Annual Percent Change</i>	--	-9.7%	-1.6%
<i>Three Year Percent Change</i>	--	--	-11.2%
Cumulative Service Availability	99.72%	99.76%	99.20%
<i>Annual Percent Change</i>	--	0.0%	-0.6%
<i>Three Year Percent Change</i>	--	--	-0.5%
Passenger Service Availability	99.85%	99.82%	99.81%
<i>Annual Percent Change</i>	--	0.0%	0.0%
<i>Three Year Percent Change</i>	--	--	0.0%
Complaints/100,000 Passenger Trips	6.34	4.63	6.02
<i>Annual Percent Change</i>	--	-27.0%	30.1%
<i>Three Year Percent Change</i>	--	--	-5.0%

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
MAINTENANCE			
Vehicle + Non-Veh. Maint. Cost/Total Operating Cost	44.1%	43.2%	45.4%
<i>Annual Percent Change</i>	--	-2.0%	5.1%
<i>Three Year Percent Change</i>	--	--	3.0%
Vehicle Maintenance Cost/Car Service Mile	\$8.21	\$8.11	\$9.36
<i>Annual Percent Change</i>	--	-1.3%	15.4%
<i>Three Year Percent Change</i>	--	--	14.0%
Spare Vehicles/Total Vehicles	50.0%	50.0%	50.0%
<i>Annual Percent Change</i>	--	0.0%	0.0%
<i>Three Year Percent Change</i>	--	--	0.0%
Mean Distance between Major Failures (Miles)	65,407	20,126	13,217
<i>Annual Percent Change</i>	--	-69.2%	-34.3%
<i>Three Year Percent Change</i>	--	--	-79.8%
Mean Distance between All Failures (Miles)	10,063	1,677	2,854
<i>Annual Percent Change</i>	--	-83.3%	70.2%
<i>Three Year Percent Change</i>	--	--	-71.6%
SAFETY			
Preventable Accidents/100,000 Car Miles	0.0	0.0	0.0
<i>Annual Percent Change</i>	--	--	--
<i>Three Year Percent Change</i>	--	--	--
Casualty & Liability Cost/Car Service Hour	\$6.50	\$6.32	\$6.41
<i>Annual Percent Change</i>	--	-2.7%	1.3%
<i>Three Year Percent Change</i>	--	--	-1.4%
Casualty & Liability Cost/Car Service Mile	\$0.50	\$0.49	\$0.51
<i>Annual Percent Change</i>	--	-3.1%	4.2%
<i>Three Year Percent Change</i>	--	--	0.9%

Hybrid Rail

BART's hybrid rail functional area performance trends for the audit period are discussed below and presented in Exhibit 11.

- Service Planning
 - The operating cost per passenger mile increased in each year, from \$2.13 in FY2023 to about \$2.50 in the last two years. There was a 19 percent overall increase.
 - The portion of car miles traveled that were in service remained at 99 percent. The portion of car hours in service also remained very near that level.
- Operations
 - Vehicle operations costs per total operating costs decreased modestly in each year, from 48.7 percent in FY2023 to 45.8 percent in FY2025.
 - Vehicle operations costs per service hour also decreased modestly in each year, from \$277 at the beginning of the period to \$258 by FY2025.
 - The hybrid rail farebox recovery ratio was reduced in each year as well, from 18.8 percent in FY2023 to 17.5 percent the next year, and down to 16.4 percent in FY2025.
 - Operator scheduled absences amounted to about seven percent of total hours worked in the first two years but increased to nearly 12 percent in FY2025.
 - Operator unscheduled absences also increased overall, from 14 percent of total hours worked in FY2023 to about 17 percent subsequently.
 - Hybrid rail on-time performance remained at about 98 percent of trips through the audit period.
 - The rate of hybrid rail related complaints increased somewhat from year to year, rising by 14 percent overall through the period.
 - The incidence of missed trips was consistently very low, ranging from 0.2 to 0.3 percent of total trips.

- Maintenance
 - Total maintenance costs (vehicle plus non-vehicle) increased modestly in each year, from 49 percent of total operating costs in FY2023 to 52 percent by FY2025.
 - Vehicle maintenance costs per service mile increased by 46 percent over the audit period, from \$5.24 in FY2023 to \$7.64 in the last year.
 - Maintenance pay hours ranged between 146 and 150 percent of car service hours through the period.
 - Maintenance employee scheduled absences decreased steadily through the period, from 22.4 to 20.1 percent of total hours worked. Meanwhile, unscheduled absences amounted to seven percent of total hours worked in both FY2023 and FY2025, while reaching 9.2 percent in the interim.
 - The hybrid rail vehicle spare ratio was 12.5 percent for the entire audit period.
 - The mean distance between major failures worsened overall, by 21 percent through the period. When looking at all failures, however, results for the first and last years were about the same.

- Safety
 - The rate of preventable accidents reflects a single accident recorded in both FY2023 and FY2024, and none in FY2025.
 - Casualty/liability costs per service hour and mile both decreased in each year, down by 60 percent and 48 percent overall, respectively.
 - There was an increase of 18 percent in lost days due to industrial accidents in FY2024 over FY2023, but no lost days reported in FY2025.

* * * * *

The following is a brief summary of the hybrid rail functional trend highlights between FY2023 and FY2025:

- For service planning, the operating cost per passenger mile increased in each year, by 19 percent overall. Meanwhile, about 99 percent of all car miles and hours were in service throughout the audit period.
- For operations, vehicle operations costs per total operating cost decreased modestly to 45.8 percent in FY2025, and vehicle operations costs per car service hour decreased modestly as well, down to \$258 by FY2025. The farebox recovery ratio also decreased through the period, from 18.8 percent in FY2023 to 16.4 percent in FY2025. Operator scheduled absences increased overall from seven to 12 percent of total hours worked, while unscheduled absences increased from 14 to 17 percent. Schedule adherence remained at about 98 percent of trips, but the rate of passenger complaints increased from year to year, rising by 14 percent overall. The incidence of missed trips was consistently very low, well under one percent of total trips.
- In the maintenance area, maintenance costs per total operating costs increased overall from 49 percent to 52 percent, while vehicle maintenance costs per service mile increased by 46 percent and maintenance pay hours per car service hours remained in a range of 146 to 150 percent. Maintenance employee scheduled absences decreased steadily to 20.1 percent of total hours worked in FY2025, while unscheduled absences amounted to seven percent in both FY2023 and FY2025. The vehicle spare ratio was steady at 12.5 percent. The mean distance between major failures worsened overall by 21 percent, but for all failures there were more steady results.
- In the safety area, the rate of preventable accidents reflects a single accident in FY2023 and FY2024, and none in FY2025. Casualty and liability costs per car service hour and mile were down by 60 percent and 48 percent overall, respectively. There was an 18 percent increase in lost days due to industrial accidents reported in FY2024 compared to FY2023, but no such lost days reported in FY2025.

Exhibit 11: Functional Performance Trends – Hybrid Rail

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
SERVICE PLANNING			
Total Operating Cost/Passenger Mile	\$2.13	\$2.50	\$2.54
<i>Annual Percent Change</i>	--	17.1%	1.7%
<i>Three Year Percent Change</i>	--	--	19.1%
Car Service Miles/Total Miles	99.2%	99.1%	99.1%
<i>Annual Percent Change</i>	--	-0.1%	0.0%
<i>Three Year Percent Change</i>	--	--	-0.2%
Car Service Hours/Total Hours	99.0%	98.1%	99.0%
<i>Annual Percent Change</i>	--	-0.8%	0.8%
<i>Three Year Percent Change</i>	--	--	0.0%
OPERATIONS			
Vehicle Operations Cost/Total Operating Cost	48.7%	46.4%	45.8%
<i>Annual Percent Change</i>	--	-4.7%	-1.3%
<i>Three Year Percent Change</i>	--	--	-5.9%
Vehicle Operations Cost/Car Service Hour	\$276.76	\$260.16	\$257.88
<i>Annual Percent Change</i>	--	-6.0%	-0.9%
<i>Three Year Percent Change</i>	--	--	-6.8%
Farebox Revenue/Operating Cost	18.8%	17.5%	16.4%
<i>Annual Percent Change</i>	--	-6.7%	-6.4%
<i>Three Year Percent Change</i>	--	--	-12.6%
Operator Sched. Absences/Total Hours Worked	7.7%	7.1%	11.7%
<i>Annual Percent Change</i>	--	-8.2%	66.2%
<i>Three Year Percent Change</i>	--	--	52.6%
Operator Unsched. Absences/Total Hours Worked	14.0%	17.2%	16.4%
<i>Annual Percent Change</i>	--	22.7%	-4.8%
<i>Three Year Percent Change</i>	--	--	16.8%
Trips On-Time/Total Trips	98.2%	98.3%	97.7%
<i>Annual Percent Change</i>	--	0.1%	-0.6%
<i>Three Year Percent Change</i>	--	--	-0.5%
Complaints per 100,000 Passenger Trips	22.24	22.94	25.34
<i>Annual Percent Change</i>	--	3.1%	10.5%
<i>Three Year Percent Change</i>	--	--	14.0%
Missed Trips/Total Trips	0.2%	0.3%	0.2%
<i>Annual Percent Change</i>	--	55.5%	-52.4%
<i>Three Year Percent Change</i>	--	--	-26.1%

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
MAINTENANCE			
Vehicle + Non-Veh. Maint. Cost/Total Operating Cost	48.7%	50.9%	51.9%
<i>Annual Percent Change</i>	--	4.4%	2.0%
<i>Three Year Percent Change</i>	--	--	6.5%
Vehicle Maintenance Cost/Car Service Mile	\$5.24	\$7.20	\$7.64
<i>Annual Percent Change</i>	--	37.4%	6.1%
<i>Three Year Percent Change</i>	--	--	45.8%
Maintenance Pay Hours/Car Service Hours	149.7%	145.9%	149.8%
<i>Annual Percent Change</i>	--	-2.6%	2.7%
<i>Three Year Percent Change</i>	--	--	0.0%
Maintenance Employee Scheduled Absences	22.4%	21.9%	20.1%
<i>Annual Percent Change</i>	--	-2.2%	-8.1%
<i>Three Year Percent Change</i>	--	--	-10.1%
Maintenance Employee Unscheduled Absences	6.9%	9.2%	7.4%
<i>Annual Percent Change</i>	--	33.8%	-19.9%
<i>Three Year Percent Change</i>	--	--	7.2%
Spare Vehicles/Total Vehicles	12.5%	12.5%	12.5%
<i>Annual Percent Change</i>	--	0.0%	0.0%
<i>Three Year Percent Change</i>	--	--	0.0%
Mean Distance between Major Failures (Miles)	133,406	93,644	105,316
<i>Annual Percent Change</i>	--	-29.8%	12.5%
<i>Three Year Percent Change</i>	--	--	-21.1%
Mean Distance between All Failures (Miles)	63,192	53,511	64,360
<i>Annual Percent Change</i>	--	-15.3%	20.3%
<i>Three Year Percent Change</i>	--	--	1.8%
SAFETY			
Preventable Accidents/100,000 Car Miles	0.08	0.09	0.00
<i>Annual Percent Change</i>	--	6.8%	-100.0%
<i>Three Year Percent Change</i>	--	--	-100.0%
Casualty & Liability Cost/Car Service Hour	\$1.83	\$0.79	\$0.72
<i>Annual Percent Change</i>	--	-57.0%	-8.0%
<i>Three Year Percent Change</i>	--	--	-60.5%
Casualty & Liability Cost/Car Service Mile	\$0.05	\$0.03	\$0.03
<i>Annual Percent Change</i>	--	-46.6%	-3.0%
<i>Three Year Percent Change</i>	--	--	-48.2%
Lost Days Due to Industrial Accidents	11.0	13.0	0.0
<i>Annual Percent Change</i>	--	18.2%	-100.0%
<i>Three Year Percent Change</i>	--	--	-100.0%

VII. CONCLUSIONS AND RECOMMENDATIONS

The preceding sections presented a review of BART's transit service performance during the three-year period of FY2023 through FY2025 (July 1, 2022 through June 30, 2025). They focused on TDA compliance issues including trends in TDA-mandated performance indicators and compliance with selected sections of the state Public Utilities Code (PUC). They also provided the findings from an overview of BART's data collection activities to support the TDA indicators, actions taken to implement recommendations from the prior performance audit, and a review of selected key functional performance results.

Conclusions

The key findings and conclusions from the individual sections of this performance audit are summarized below:

Data Collection – Based on the information provided, BART is in compliance with the data collection and reporting requirements for all five TDA statistics. In addition, the statistics collected over the six-year review period appear to be consistent with the TDA definitions, and despite a few noted exceptions indicate consistency in terms of the direction and magnitude of the year-to-year changes across the statistics, especially when taking into account the impacts of the recent COVID-19 pandemic on service provision and ridership.

TDA Performance Trends – BART's performance trends for the five TDA-mandated indicators were analyzed by mode. A six-year analysis period was used for all the indicators. In addition, component operating costs were analyzed for the six-year period.

- Heavy Rail TDA Performance Indicators – The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 4.5 percent, or 0.7 percent in inflation adjusted dollars. There were increases in every year except FY2022. The largest annual increase was in FY2024 (32.6 percent).
 - Passenger productivity showed a notable decline, with passengers per vehicle service hour and mile decreasing by ten and eight percent per year overall, respectively. These trends were most significantly impacted by a major ridership decline in FY2021, the first full year of the COVID pandemic.
 - The cost per passenger increased on average by 16.1 percent per year, which, when measured in constant FY2020 dollars, was still an increase of nearly 12 percent. This trend was also most significantly impacted by the major ridership decline in FY2021.
 - For employee productivity, car service hours per employee decreased by 2.6 percent on average per year, though there were notably higher results in FY2022 and FY2023. The trend was significantly influenced by post-COVID response service restoration in Fall 2021, and major schedule changes in Fall 2023.
- Heavy Rail Component Costs – The following is a brief summary of the component operating costs trend highlights for the heavy rail service between FY2020 and FY2025:
 - The most significant change was a 23.3 percent average annual increase in casualty/liability costs, though these costs represented only a small portion of total costs.
 - Labor costs went up by 6.1 percent per year on average and were the largest portion of total costs in all years, at nearly 50 percent.
 - Fringe benefits costs comprised the second largest cost category. They increased on average by 5.8 percent annually, while remaining between 25 and 30 percent of total costs.

- Services, materials/supplies and utilities costs each accounted for less than ten percent of total costs and posted average annual increases of about five percent.
- Automated People Mover TDA Performance Indicators – The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 1.8 percent, which amounted to a decrease of 1.9 percent in inflation adjusted dollars. Service hours were almost even in FY2020 and FY2025 while corresponding operating costs increased by 2.4 percent.
 - Passenger productivity showed overall decline, with passengers per vehicle service hour and mile decreasing by 7.5 percent and 1.8 percent per year on average. These trends reflect an 80 percent reduction in passengers in the first full year of the pandemic (FY2021), but substantial rebounding subsequently.
 - The cost per passenger increased on average by 10.1 percent per year, which when measured in constant FY2020 dollars, resulted in an average annual increase of 6.1 percent. This trend was also significantly impacted by the major ridership decline in FY2021, and rebounding starting in FY2022.
- Automated People Mover Component Costs – The following is a brief summary of the component operating costs trend highlights for automated people mover service between FY2020 and FY2025:
 - The most significant change was an average annual increase of more than 50 percent in the materials/supplies area, though the dollar amounts involved were minimal.
 - In-house labor costs decreased by 8.3 percent per year, while fringe benefits costs decreased by 12.3 percent. Each category contributed no more than three percent of total operating costs.
 - Utilities costs remained between ten and 12 percent of total costs, while casualty/liability costs were consistently around one percent.
 - Purchased transportation was the largest component of total operating costs for this contracted service, at 83 to 86 percent. Purchased transportation costs increased approximately 2.4 percent per year.

- Hybrid Rail TDA Performance Indicators – The following is a brief summary of the hybrid rail TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 8.3 percent, or 4.4 percent in inflation adjusted dollars. After FY2021, there were major increases in the next two years, followed by relatively small changes in FY2024 and FY2025.
 - Passenger productivity showed notable decline, with passengers per car service hour decreasing by 5.6 percent per year overall, and passengers per car service mile by nearly four percent. These trends were driven by major decreases in passengers in FY2021, the first full year of the COVID pandemic, but substantial rebounding subsequently.
 - The cost per passenger increased on average by 14.7 percent per year, which, when measured in constant FY2020 dollars, resulted in an average annual increase of nearly 11 percent. This trend was significantly impacted by COVID related ridership declines in FY2021. Subsequently, the cost per passenger leveled out in a range of \$16 to \$18.
 - Employee productivity decreased on average by five percent per year. Higher employee productivity was recorded in FY2020 and FY2021, when the impact of the COVID pandemic was most pronounced.
- Hybrid Rail Component Costs – The following is a brief summary of the component operating costs trend highlights for hybrid rail service between FY2020 and FY2025:
 - Labor costs contributed just under half of total operating costs, and fringe benefits costs another third. Both increased on average per year, by 8.3 percent and 11.4 percent.
 - Services costs decreased slightly overall, with the share of total costs dropping to less than three percent in the last three years. At the same time, materials/supplies costs went up by 12.4 percent, and the share of total costs increased to about 19 percent.
 - Utilities and casualty/liability costs together consistently accounted for just two percent or less of total costs. In addition, “other expenses” increased by 48.7 percent per year, but constituted well under one percent of total costs.

Compliance with Statutory Requirements – BART is in compliance with the applicable sections of the state PUC that were reviewed as part of this performance audit. The sections reviewed included requirements concerning labor contracts, reduced fares, Welfare-to-Work, revenue sharing, and evaluation of passenger needs.

Status of Prior Audit Recommendations – There were no recommendations made in BART’s prior performance audit.

Functional Performance Indicator Trends – To further assess BART’s performance over the past three years, a detailed set of systemwide and modal functional area performance indicators was defined and reviewed.

- Systemwide (All Modes) – The following is a brief summary of the systemwide functional trend highlights between FY2023 and FY2025:
 - Administrative costs compared to total costs increased by ten percent and compared to car service hours by nearly 60 percent.
 - Marketing costs decreased somewhat compared to both total administrative costs and passenger trips.
 - The systemwide farebox recovery ratio increased from 24 percent to more than 26 percent.
- Heavy Rail Service – The following is a brief summary of the heavy rail service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile remained in a range of \$1.12 to \$1.15, while the portion of car miles and hours in service remained at about 97 percent through the period.
 - For operations, the vehicle operations cost per total operating cost decreased but remained near 40 percent, while vehicle operations costs per car service hour increased noticeably from \$1.18 to \$1.61, but the farebox recovery ratio increased from 24 percent to more than 26 percent. Operator scheduled absences remained at about 15 percent of total hours worked, while unscheduled absences decreased from 19.6 to 13.7 percent. Schedule

adherence was just 70 percent or somewhat higher, but BART provided evidence of significant improvement through various operational initiatives to 84.2 percent in FY2026 (after the audit period). Meanwhile, the rate of complaints decreased by 20 percent in the last year and about four percent of total trips were missed in the first year, down to one percent thereafter.

- In the maintenance area, maintenance costs per total operating costs remained steady at 33 percent, while vehicle maintenance costs per service mile increased overall by 40 percent. Maintenance pay hours rose from 60 to 70 percent of car service hours by FY2025. Maintenance employee scheduled absences decreased steadily to 18 percent of total hours, while unscheduled absences remained at about ten percent. The vehicle spare ratio varied from 25 percent in FY2024 to over 50 percent in FY2025. The mean distance between major failures improved overall, especially by 80 percent between FY2023 and FY2024, and this trend was even more pronounced for all failures.
- In the safety area, the rate of preventable accidents per 100,000 miles increased by 27 percent overall. At the same time, casualty and liability costs per car service hour and mile increased by 140 percent in FY2024 but were then reduced by 17 percent in FY2025. Lost days due to industrial accidents decreased by 32.5 percent over the period.
- Automated People Mover Service – The following is a brief summary of the automated people mover service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile increased by 15 percent to \$6.87 in FY2025. Meanwhile, 99 percent of vehicle miles and hours were consistently in service.
 - For operations, the vehicle operations cost per total operating cost increased 29 to 31 percent in FY2025, while vehicle operations costs per car service hour increased by 14 percent overall. The farebox recovery ratio decreased from 34.4 percent in FY2023 to about 31 percent subsequently. Cumulative and passenger service availability both remained at more than 99 percent, while the rate of complaints decreased by 27 percent in FY2024 but subsequently returned almost to the FY2023 level.

- In the maintenance area, maintenance costs remained between 43 and 45 percent of total operating costs, while vehicle maintenance costs per car service mile increased by 14 percent. The vehicle spare ratio remained at 50 percent, but the mean distance between major failures worsened significantly in each year. At the same time, the mean distance between all failures was down by 83 percent in FY2024, though there was some improvement in FY2025.
- For safety, no preventable accidents were recorded in any year, and casualty/liability costs per car service hour and mile both showed only very minor changes overall.
- Hybrid Rail Service – The following is a brief summary of BART’s hybrid rail service functional trend highlights between FY2023 and FY2025:
 - For service planning, the operating cost per passenger mile increased in each year, by 19 percent overall. Meanwhile, about 99 percent of all car miles and hours were in service throughout the audit period.
 - For operations, vehicle operations costs per total operating cost decreased modestly to 45.8 percent in FY2025, and vehicle operations costs per car service hour decreased modestly as well, down to \$258 by FY2025. The farebox recovery ratio also decreased through the period, from 18.8 percent in FY2023 to 16.4 percent in FY2025. Operator scheduled absences increased overall from seven to 12 percent of total hours worked, while unscheduled absences increased from 14 to 17 percent. Schedule adherence remained at about 98 percent of trips, but the rate of passenger complaints increased from year to year, rising by 14 percent overall. The incidence of missed trips was consistently very low, well under one percent of total trips.
 - In the maintenance area, maintenance costs per total operating costs increased overall from 49 percent to 52 percent, while vehicle maintenance costs per service mile increased by 46 percent and maintenance pay hours per car service hours remained in a range of 146 to 150 percent. Maintenance employee scheduled absences decreased steadily to 20.1 percent of total hours worked in FY2025, while unscheduled absences amounted to seven percent in both FY2023 and FY2025. The vehicle spare ratio was steady at 12.5 percent. The mean distance between major failures worsened overall by 21 percent, but for all failures there were more steady results.

- In the safety area, the rate of preventable accidents reflects a single accident in FY2023 and FY2024, and none in FY2025. Casualty and liability costs per car service hour and mile were down by 60 percent and 48 percent overall, respectively. There was an 18 percent increase in lost days due to industrial accidents reported in FY2024 compared to FY2023, but no such lost days reported in FY2025.

Recommendations

1. TAKE FURTHER STEPS TO REDUCE PREVENTABLE ACCIDENTS ON BART'S HEAVY RAIL SERVICE.

[Reference Section: VI. Functional Performance Indicator Trends]

Recent increases in the rates of preventable accidents on BART's heavy rail services point to a potentially burgeoning safety issue which BART should continue to address. There were more than 500 separate incidences reported in each audit year, and the rate of preventable accidents increased steadily, rising from 0.65 per 100,000 miles traveled in the first year to 0.83 in FY2025 (27 percent). BART reports that it has recently taken several proactive measures to improve both employee and patron safety throughout the system. Continuing efforts should include additional strategies to improve operator training and enhance monitoring activities to ensure that safety issues are identified and corrected before they have a chance to escalate further.

2. EXAMINE MAINTENANCE ACTIVITIES AND DEVELOP STRATEGIES TO ADDRESS INCREASING MECHANICAL FAILURE RATES ON BART'S AUTOMATED PEOPLE MOVER SERVICE.

[Reference Section: VI. Functional Performance Indicator Trends]

Maintenance results for BART's automated people mover service showed service reliability generally declining over the audit period. The mean distance between major failures worsened significantly in each year, while at the same time, the mean distance between all failures was down by 83 percent in FY2024, though there was some improvement in FY2025. Expanded efforts should be made by BART and the operating

contractor to improve the maintenance function to increase vehicle reliability and reduce the growing rates of mechanical failures on this service.

**APPENDIX A:
INPUT STATISTICS FOR
FUNCTIONAL PERFORMANCE MEASURES**

Functional Performance Inputs – BART Systemwide

Data Item	FY2023	FY2024	FY2025	Source
Total Operating Costs	\$782,584,958	\$883,464,181	\$919,895,051	NTD F-40
Administrative Costs	\$185,416,087	\$228,201,364	\$240,789,406	NTD F-40
Car Service Hours	2,724,074	2,333,890	2,229,590	NTD S-10 (all modes)
Marketing Costs	\$3,819,680	\$4,079,368	\$3,843,270	PeopleSoft Budget Performance Report
Unlinked Passenger Trips	50,764,402	54,927,366	58,368,709	NTD S-10 (all modes)
Farebox Revenue (All Modes)	\$187,806,398	\$218,404,362	\$243,309,428	NTD F-10

Functional Performance Inputs – BART Heavy Rail

Data Item	FY2023	FY2024	FY2025	Source
Car Service Miles	83,783,824	71,858,025	67,749,001	NTD S-10 HR
Total Car Miles	86,306,518	73,981,703	70,117,653	NTD S-10 HR
Car Service Hours	2,669,501	2,273,862	2,166,352	NTD S-10 HR
Total Car Hours	2,739,475	2,323,657	2,214,505	NTD S-10 HR
Unlinked Passenger Trips	49,043,322	53,222,212	56,592,868	NTD S-10 HR
Farebox Revenue	\$181,243,024	\$211,709,150	\$236,627,027	NTD F-10
Total Operating Costs	\$754,188,006	\$851,562,085	\$886,095,700	NTD F-30 HR
Passenger Miles	670,728,256	740,857,064	793,272,603	NTD S-10 HR
Vehicle Operations Costs	\$315,851,598	\$350,991,949	\$349,460,312	NTD F-30 HR
Total Operator Work Hours	577,876	684,610	719,614	BART HRIS
Operator Scheduled Absences (Hours)	87,611	97,265	113,316	BART HRIS
Operator Unsched. Absences (Hours)	113,200	120,783	98,683	BART HRIS
Trips On-Time	146,405	165,367	153,300	Reliability Engineering
Total Trips	208,331	214,955	215,090	Reliability Engineering
Complaints	4,921	5,718	4,522	Customer Service
Missed Trips	9,090	2,061	3,124	Reliability Engineering
Maintenance Pay Hours	1,564,560	1,533,858	1,524,046	BART HRIS
Total Maintenance Employee Work Hours	1,104,393	1,105,799	1,150,490	BART HRIS
Maint. Empl. Sched. Absences (Hours)	250,142	234,716	210,792	BART HRIS
Maint. Empl. Unsched. Absences (Hours)	107,979	101,938	115,552	BART HRIS
Vehicle Maintenance Costs	\$125,932,243	\$140,188,464	\$142,257,956	NTD F-30 HR
Non-Vehicle Maintenance Costs	\$130,137,184	\$135,756,091	\$156,740,458	NTD F-30 HR
Spare Vehicles (Total less Max. Svc.)	321	192	439	NTD S-10 HR

Data Item	FY2023	FY2024	FY2025	Source
Total Vehicles	887	758	819	NTD S-10 HR
Revenue Veh. Mech. Sys. Failures - Total	612	262	258	NTD R-20
Revenue Veh. Mech. Sys. Failures - Major	359	170	199	NTD R-20
Preventable Accidents	563	535	580	OSHA Form 300
Casualty/Liability Costs	\$16,182,365	\$33,369,851	\$26,122,041	NTD F-30 HR
Lost Days – Industrial Accidents	48,043	34,661	32,450	OSHA Form 300

Functional Performance Inputs – BART Automated People Mover

Data Item	FY2023	FY2024	FY2025	Source
Car Service Miles	258,323	258,320	247,826	NTD S-10 MG
Total Car Miles	261,626	261,634	251,130	NTD S-10 MG
Car Service Hours	20,044	19,949	19,686	NTD S-10 MG
Total Car Hours	20,205	20,111	19,847	NTD S-10 MG
Unlinked Passenger Trips	457,366	432,021	398,541	NTD S-10 MG
Farebox Revenue	\$2,878,424	\$2,757,060	\$2,658,203	NTD F-10
Total Operating Costs	\$8,377,661	\$8,883,741	\$8,707,635	NTD F-30 MG
Passenger Miles	1,397,222	1,373,827	1,267,360	NTD S-10 MG
Vehicle Operations Costs	\$2,437,116	\$2,627,091	\$2,733,428	NTD F-30 MG
Cumulative Service Availability	99.72%	99.76%	99.20%	Doppelmayr Ops. Mgr.
Passenger Service Availability	99.85%	99.82%	99.81%	Doppelmayr Ops. Mgr.
Complaints	29	20	24	Customer Service
Vehicle Maintenance Costs	\$2,121,048	\$2,094,509	\$2,319,004	NTD F-30 MG
Non-Vehicle Maintenance Costs	\$1,571,424	\$1,744,509	\$1,634,874	NTD F-30 MG
Spare Vehicles (Total less Max. Svc.)	2	2	2	NTD S-10 MG
Total Vehicles	4	4	4	NTD S-10 MG
Rev. Veh. Mech. Sys. Failures - Total	26	156	88	NTD R-20
Rev. Veh. Mech. Sys. Failures - Major	4	13	19	NTD R-20
Preventable Accidents	0	0	0	OSHA Form 300
Casualty/Liability Costs	\$130,209	\$126,141	\$126,093	NTD F-30 MG

Functional Performance Inputs – BART Hybrid Rail

Data Item	FY2023	FY2024	FY2025	Source
Car Service Miles	1,191,602	1,113,639	1,147,819	NTD S-10 YR
Total Car Miles	1,200,652	1,123,728	1,158,472	NTD S-10 YR
Car Service Hours	34,529	40,079	43,552	NTD S-10 YR
Total Car Hours	34,891	40,838	44,012	NTD S-10 YR
Unlinked Passenger Trips	1,263,714	1,273,133	1,377,300	NTD S-10 YR
Farebox Revenue	\$3,684,950	\$3,938,152	\$4,024,198	NTD F-10
Total Operating Costs	\$19,617,059	\$22,463,561	\$24,513,178	NTD F-30 YR
Passenger Miles	9,189,847	8,986,977	9,639,599	NTD S-10 YR
Vehicle Operations Costs	\$9,556,341	\$10,426,955	\$11,230,988	NTD F-30 YR
Total Operator Work Hours	45,584	44,258	44,200	BART HRIS
Operator Sched. Absences (Hours)	3,509	3,129	5,193	BART HRIS
Operator Unsched. Absences (Hours)	6,392	7,617	7,239	BART HRIS
Trips On-Time	47,237	47,871	45,894	Reliability Engineering
Total Trips	48,089	48,690	46,978	Reliability Engineering
Complaints	281	292	349	Customer Service
Missed Trips	108	170	78	Reliability Engineering
Maintenance Pay Hours	51,704	58,472	65,232	BART HRIS
Total Maint. Employee Work Hours	33,937	39,245	47,741	BART HRIS
Maint. Employee Sched. Abs. (Hours)	7,599	8,595	9,613	BART HRIS
Maint. Empl. Unsched. Abs. (Hours)	2,326	3,599	3,509	BART HRIS
Vehicle Maintenance Costs	\$6,244,764	\$8,020,734	\$8,772,525	NTD F-30 YR
Non-Vehicle Maintenance Costs	\$3,317,153	\$3,412,515	\$3,956,100	NTD F-30 YR
Spare Vehicles (Total less Max. Svc.)	2	2	2	NTD S-10 YR

Data Item	FY2023	FY2024	FY2025	Source
Total Vehicles	16	16	16	NTD S-10 YR
Rev. Veh. Mech. Sys. Failures - Total	19	21	18	NTD R-20
Rev. Veh. Mech. Sys. Failures - Major	9	12	11	NTD R-20
Preventable Accidents	1	1	0	OSHA Form 300
Casualty/Liability Costs	\$63,256	\$31,565	\$31,547	NTD F-30 YR
Lost Days – Industrial Accidents	11	13	0	OSHA Form 300

APPENDIX B

**TRIENNIAL PERFORMANCE AUDIT
OF THE
EAST BAY PARATRANSIT CONSORTIUM (EBPC)**

FINAL AUDIT REPORT

JUNE 2026

NOTE: All exhibits in this report are presented at the end of the associated discussion in each section.

EXECUTIVE SUMMARY

This executive summary highlights the findings from the performance audit of the East Bay Paratransit Consortium (EBPC), which was formed by AC Transit and BART to meet the requirements for providing ADA-mandated complementary paratransit in their overlapping service areas. In California, a performance audit must be conducted every three years of any transit operator receiving Transportation Development Act (TDA) Article 4 funds, to determine whether the operator is in compliance with certain statutory and regulatory requirements, and to assess the efficiency and effectiveness of the operator's services.

Since EPBC is a shared responsibility of both BART and AC Transit, EBPC's performance audit is included in the performance audits of both operators, as an appendix. The audit covers the period of Fiscal Years 2023 through 2025 (from July 1, 2022 through June 30, 2025).

Performance Audit and Report Organization

The performance audit was conducted for MTC in accordance with its established procedures for performance audits. The final audit report consists of these sections:

- An assessment of data collection and reporting procedures;
- A review of performance trends in TDA-mandated indicators and component costs;
- An evaluation of EBPC's actions to implement the recommendations from the last performance audit;
- An evaluation of functional performance indicator trends; and
- Findings, conclusions, and recommendations to further improve EBPC's performance based on the results of the previous sections.

Comments received from AC Transit, BART and MTC staff regarding the draft report were incorporated into the final report. Highlights of the key activities are presented in this executive summary.

Results and Conclusions

Review of TDA Data Collection and Reporting Methods - The purpose of this review is to determine if EBPC is in compliance with the TDA requirements for data collection and reporting. The review is limited to the five data items needed to calculate the TDA-mandated performance indicators. This review has determined that EBPC is in compliance with the data collection and reporting requirements for all five TDA statistics. In addition, the statistics collected over the six-year review period appear to be consistent with the TDA definitions and indicate general consistency in terms of the direction and magnitude of the year-to-year changes across the statistics.

Performance Indicators and Trends – EBPC’s performance trends for four of the five TDA-mandated indicators were analyzed. The fifth indicator, vehicle service hours per employee, was not analyzed since FTEs were not reported for this service, which is provided by multiple contractors. A six-year analysis period was used for all the indicators. In addition, component operating costs were analyzed.

- The following is a brief summary of EBPC’s TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 8.2 percent, when adjusted for inflation, amounts to an average annual increase of 4.2 percent in constant dollars.
 - The cost per hour ranged from a low of \$116.48 in FY2020 to a high of \$172.69 in FY2025. There were increases in three of the six years, with the largest (30.9 percent) occurring in FY2021.

- Passenger productivity exhibited a modest downward trend, driven by small average annual increases in service hours and miles combined with almost unchanged ridership during the review period. Passengers per vehicle service hour and vehicle service mile declined by 2.5 percent and 2.7 percent per year on average during the period, respectively.
- The cost per passenger increased on average by 11 percent per year, which amounted to an average annual increase of 6.9 percent in constant FY2020 dollars. Operating costs increased 9.5 percent per year on average between FY2020 and FY2025, while ridership moved back toward pre-pandemic levels, finishing the six-year review period with a 1.4 percent annual average decrease.
- The following is a brief summary of the component operating costs trend highlights between FY2020 and FY2025:
 - Purchased transportation costs represented the largest portion of the total operating costs by far, comprising about 98 percent of total costs over the six-year period.
 - Purchased transportation increased an average of 9.7 percent annually, almost identical to the 9.5 percent overall increase in operating costs over the analysis period.
 - In total, in-house (non-contracted) labor and fringe benefit costs comprised less than two percent of the total costs in during the analysis period. Labor costs increased an annual average of 5.8 percent, while fringes increased an average of 5.7 percent per year.
 - Materials/supplies decreased an average of 13.5 percent per year. Services costs were sporadic throughout the analysis period, only being recorded in 2020 and 2024.
 - There was an average yearly 45 percent increase in the casualty/liability category, although these expenses comprised less than one tenth of one percent of the annual total operating costs. The casualty/liability cost increases were attributed to an increase in injury claims and the addition of two contract service providers, requiring an increase in insurance coverage.

Status of Prior Audit Recommendations – There were no recommendation made in EBPC’s prior performance audit.

Functional Performance Indicator Trends - To further assess EBPC's performance over the past three years, a detailed set of functional area performance indicators was defined and reviewed. The following is a brief summary of the functional trend highlights between FY2023 and FY2025:

- Service Planning results showed a 9.3 percent increase in operating cost per passenger mile, the percentage of vehicle miles and vehicle hours in service averaging around 82 percent and 87 percent, respectively, and the farebox recovery ratio decreasing from 3.7 percent to 3.2 percent overall.
- Operations results showed a slight uptick of 1.6 percent in vehicle operations cost per total costs but a 28 percent increase in operating cost per vehicle service hour. This reflects an almost 20 percent increase in operating costs outpacing the 6.2 percent increase in service hours during the current audit period. Schedule adherence declined slightly from 97 to 95 percent, and there was about a 15 percent overall increase in the rate of complaints. The missed trip rate doubled percentage wise but was still less than one percent of total trips throughout the audit period. Capacity trip denials decreased by more than 40 percent, while total trip cancellations decreased 9 percent and late trip cancellations/rider fault no-shows decreased over 50 percent overall.
- Maintenance results included total maintenance costs decreasing from two percent to 1.6 percent of total operating costs over the period, while vehicle maintenance costs per service mile remained unchanged. The spare ratio increased from 16 to 19 percent during the audit period. Vehicle reliability was mixed as there was significant overall improvement (greater than 50 percent) for the major mechanical failure rate but distance between all mechanical failures decreased by 12 percent.
- Safety performance improved, with the incidence of preventable accidents reported decreasing about 16 percent with the actual rate dropping below three accidents per 100,000 vehicle miles in the last two years of the audit period.

Recommendations

No recommendations are suggested for EBPC based on the results of this triennial performance audit.

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I. INTRODUCTION

The East Bay Paratransit Consortium (EBPC) was formed by AC Transit and BART to meet the requirements for providing ADA-mandated complementary paratransit in their overlapping service areas. Both AC Transit and BART have been instrumental in the creation of the Consortium and its subsequent operation. Both agencies provide oversight of the consortium. Passengers are Consortium passengers; they are not identified as AC Transit or BART passengers. Similarly, both agencies share responsibility for performance results and the implementation of any recommendations that would arise.

In light of the organizational arrangement, the review is being conducted separate from the concurrent AC Transit and BART performance audits. This appendix is being included in the performance audit reports for both AC Transit and BART. The audit period is also Fiscal Years 2023 through 2025 (from July 1, 2022 through June 30, 2023). An overview of EBPC is provided in Exhibit A-1. This is followed by an organization chart in Exhibit A-2 that reflects the basic organizational structure and typical functions during the audit period.

Performance Audit and Report Organization

This performance audit of EBPC was conducted for MTC in accordance with its established procedures for performance audits. The audit consisted of two discrete phases:

- Compliance Audit – Activities in this phase included:
 - An overview of data collection and reporting procedures for the five TDA performance indicators; and
 - Analysis of the TDA indicators.

- Functional Review – Activities in this phase included:
 - A review of actions to implement the recommendations from the prior performance audit;
 - Calculation and evaluation of functional performance indicator trends; and
 - Findings, conclusions, and the formulation of recommendations.

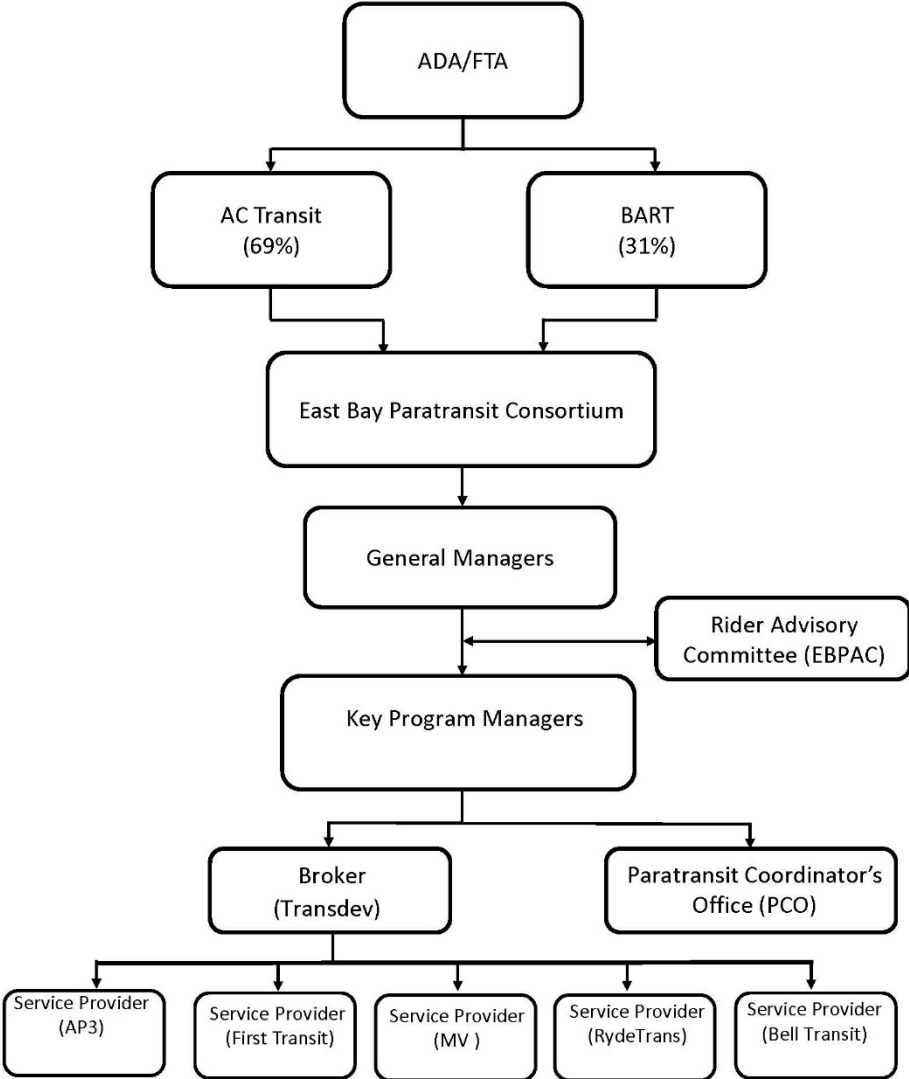
This report presents the findings from both phases. Comments received from EBPC and MTC staff regarding the draft report were incorporated into the final report.

Exhibit 1: System Overview

Location	Headquarters: 1750 Broadway, Oakland CA 94612
Establishment	EBPC was formed in 1994 by AC Transit and BART through a Joint Exercise of Powers agreement (JPA). It was formed to provide paratransit service to fulfill both agencies' ADA obligations in their joint service areas.
Board	EBPC is governed by the Boards of Directors of BART and AC Transit, with direction from a Service Review Committee (SRC) that includes the General Managers of both agencies. The SRC receives guidance from a 16-member Service Review Advisory Committee (SRAC), comprised of ADA riders (8), a City Based Paratransit Program Manager from both Alameda and Contra Costa Counties (2), Social Service Agency representatives (2), and ADA Rider Representatives from four advisory committees connected to the EBPC (4). The transition from the SRAC to the EBPAC was due to the lifting of the state of emergency orders and certain provisions of the Brown Act. As the EBPAC the committee can continue to meet remotely and/or in-person. Oversight of EBPC's activities is led jointly by Program Managers from both agencies. In addition, a contracted Program Coordinator's Office (PCO) was established in the JPA to serve as a neutral, central point of contact between AC Transit and BART, and to fulfill certain administrative and coordination activities for the two member agencies.
Service Data	<p>EBPC provides ADA paratransit service to eligible riders in Alameda County and western Contra Costa County, and to and from San Francisco. EBPC operates through a brokerage system. Transdev Services, Inc. is the contracted broker, handling eligibility certifications, reservations, schedules, dispatch, customer service, and contracts with service providers. Transdev contracts with five private operators for the actual provision of vehicles and drivers.</p> <p>EBPC operates during the same hours as the regular AC Transit buses and BART trains. Service is limited to areas within ¾ mile of an operating bus route or within a ¾ mile radius around a BART station. Phone reservations are required. Trips can be arranged up to seven days in advance. Trips must be scheduled by 5:00 p.m. the day before traveling. Standing orders are accepted, based on availability, from riders who want to take the same trip on a regular basis. Trip cancellations must be made at least one hour before the scheduled pick-up time, or the passenger will be considered a "no-show/late cancellation."</p> <p>Fares are based on the distance traveled, and one-way fares range from \$4.00 to \$10.00. These fares represent rates in effect since January 2011. San Francisco trips that go beyond BART's service area require an additional \$2.50 charge collected on behalf of SFMTA Paratransit. Ten-trip ticket books are available with ticket denominations of \$4.00 and \$1.00. Each rider may bring one companion (more can be added on the</p>

	<p>day of service if there is room), who must pay the same fare as the rider. A required Personal Care Attendant can accompany a certified rider at no extra charge. EBPC introduced a contactless payment application during the pandemic. Riders have a choice of paying for a single trip or multiple trips at the time of booking or pay upon boarding the vehicle.</p>
Recent Changes	<p>EBPC implemented a travel training program in the last year. This is a five year program funded by the Alameda County Transportation Commission (ACTC). The Program trains individuals to utilize fixed-route bus or rail for all or some of their trips that otherwise would have been taken on EBP. EBPC recently entered into a 4.5 year contract with a 5 year option with Transdev. The payment structure is a lump sum payment that includes a fixed fee as opposed to the historical structure of a cost plus fixed fee payment structure.</p>
Planned Changes	<p>EBPC is replacing its twenty -five (25) year old legacy software (ADEPT) with a technologically advanced software platform, Spare. The cutover will occur in the second calendar quarter of 2026. Additionally, EBPC is updating its website and contactless payment application to allow the riders to independently book, view and manage their trips. Under the new contract EBPC is allowing for a higher percentage of non-Type II vehicles (traditional cutaways)</p>
Staff	<p>In addition to AC Transit and BART staff time, the contracted Program Coordinator Office (PCO) adds one FTE to EBPC’s administration and coordination functions, and the Broker assigns approximately 85 FTEs to its various duties.</p>

Exhibit 2: Current Organization Chart



II. REVIEW OF TDA DATA COLLECTION AND REPORTING METHODS

This section focuses on the five performance indicators required by TDA law. The state PUC has defined these indicators to evaluate the transit operator's efficiency, effectiveness, and economy. The purpose of this review is to determine if EBPC is in compliance with the data collection and reporting requirements necessary to calculate the TDA performance indicators. The review is limited to the data items needed to calculate the indicators:

- Operating costs
- Vehicle service hours
- Vehicle service miles
- Unlinked passengers
- Employees (full-time equivalents)

The TDA indicator analysis is based on these operating and financial statistics in the National Transit Database (NTD) reports submitted annually to the Federal Transit Administration (FTA). AC Transit and BART both submit EBPC data to the NTD. BART submits primarily operating cost data, which is limited to BART's 31 percent share of EBPC costs. This is not in addition to AC Transit's reporting, which reflects 100 percent of all EBPC data. AC Transit submits complete systemwide data for total costs, passengers, hours, and miles, as well as other statistics. The EBPC information reported by AC Transit covering the prior audit period is presented here.

Compliance with Requirements

To support this review, EBPC confirmed its data collection and reporting procedures as described in the prior performance audit. The definitions and procedures

used to derive the TDA statistics generally are consistent with those used for the NTD reporting system.

Based on the information provided, as shown in Exhibit 3.1, EBPC is in compliance with the data collection and reporting requirements for the TDA statistics.

Consistency of the Reported Statistics

The resulting TDA statistics for EBPC's transit services are shown in Exhibit 3.2. Included are statistics covering each fiscal year of the three-year audit, plus the preceding three fiscal years, resulting in a six-year trend. The available statistics collected over the period appear to be consistent with the TDA definitions. Further, they indicate general consistency in terms of the direction and magnitude of the year-to-year changes across the statistics. For example, increases or decreases in annual operating costs are relatively proportional to increases or decreases in annual vehicle service hours and miles.

Exhibit 3.1: Compliance with TDA Data Collection and Reporting Requirements

TDA Statistic	TDA Definition	Compliance Finding	Verification Information
Operating Cost	<p>“Operating cost” means all costs in the operating expense object classes exclusive of the costs in the depreciation and amortization expense object class of the uniform system of accounts and records adopted by the Controller pursuant to Section 99243, and exclusive of all subsidies for commuter rail services operated under the jurisdiction of the Interstate Commerce Commission and of all direct costs for providing charter services, and exclusive of all vehicle lease costs.</p>	<p>In Compliance</p>	<p>Costs are gathered monthly for all elements of the operation. These include the service providers’ expenses net of imposed liquidated damages, fuel, Broker’s office, Program Coordinator’s Office, incentives/disincentives, and miscellaneous expenses.</p> <p>Costs are invoiced to EBPC with supporting documentation and paid in arrears after invoice review and approval. AC Transit and BART share in the full costs of the service, based on an allocation agreement.</p>
Vehicle Service Hours	<p>“Vehicle service hours” means the total number of hours that each transit vehicle is in revenue service, including layover time.</p>	<p>In Compliance</p>	<p>Hours are captured from information recorded on the driver’s manifest and tabulated each month.</p> <p>Drivers report garage pull-out and pull-in times plus first pick-up and last drop-off times. These are entered from the manifest into the scheduling software system at the Broker’s office, which calculates total and vehicle service hours.</p> <p>Vehicle service hours include the time between the first passenger pick up and the last drop off, less time for driver breaks or any other time when the vehicle is out of service</p>

TDA Statistic	TDA Definition	Compliance Finding	Verification Information
Vehicle Service Miles	“Vehicle service miles” means the total number of miles that each transit vehicle is in revenue service.	In Compliance	<p>Miles are captured from information recorded on the driver’s manifest and on-board mobile data computers and tabulated each month.</p> <p>Drivers report garage pull-out and pull-in mileage plus first pick-up and last drop-off mileage. These are entered from the manifest into the scheduling software system at the Broker’s office, which calculates total and vehicle service miles.</p> <p>Vehicle service miles include the miles between the first passenger pick up and the last drop off.</p>
Unlinked Passengers	“Unlinked passengers” means the number of boarding passengers, whether revenue producing or not, carried by the public transportation system.	In Compliance	<p>The paratransit scheduling system at the Broker’s office is programmed to automatically calculate unlinked passengers.</p> <p>One passenger is defined as a one-way trip taken by one individual from one origin to one destination. Total unlinked passengers include escorts and attendants.</p>
Employee Full-Time Equivalents	2,000 person-hours of work in one year constitute one employee.	In Compliance	<p>Hours worked at the Broker’s office are tabulated each month and billed at the individual’s hourly rate. Service providers are under contract to the Broker. The billing structure of provider services is a comprehensive hourly rate per total vehicle hour. This rate includes salaries, along with vehicles, training, uniforms, insurance, etc. Therefore, EBPC does not report total FTEs.</p>

Exhibit 3.2: TDA Statistics

TDA Statistics	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
Operating Cost (Actual \$)	\$39,847,629	\$26,584,038	\$36,448,604	\$44,057,390	\$55,407,510	\$62,744,413	- -
Annual Change	- -	-33.3%	37.1%	20.9%	25.8%	13.2%	9.5%
Operating Cost (Constant \$)	\$39,847,629	\$25,489,979	\$32,481,253	\$38,374,449	\$46,855,927	\$52,056,771	- -
Annual Change	- -	-36.0%	27.4%	18.1%	22.1%	11.1%	5.5%
Vehicle Service Hours	342,100	174,372	244,506	322,042	368,102	363,333	- -
Annual Change	- -	-49.0%	40.2%	31.7%	14.3%	-1.3%	1.2%
Vehicle Service Miles	4,772,449	2,348,408	3,282,440	4,411,277	5,025,019	5,099,390	- -
Annual Change	- -	-50.8%	39.8%	34.4%	13.9%	1.5%	1.3%
Unlinked Passengers	556,431	199,825	316,792	419,288	480,098	519,603	- -
Annual Change	- -	-64.1%	58.5%	32.4%	14.5%	8.2%	-1.4%
Employee Full-Time Equivalents	(a)	(a)	(a)	(a)	(a)	(a)	- -
Annual Change	- -	- -	- -	- -	- -	- -	- -
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
Cumulative Change	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

(a) Not applicable as EBPC service is provided by contractors

Note: FY2020 statistics include one quarter of COVID pandemic influenced statistics

Sources: FY2020 through FY2022 - Prior Performance Audit Report

FY2022 through FY2025 – NTD Reports (FY25 original submission)

CPI Data - U.S. Department of Labor, Bureau of Labor Statistics

III. TDA PERFORMANCE INDICATORS AND TRENDS

The performance trends for EBPC's service are presented in this section. Performance is discussed for four of the five TDA-mandated performance indicators:

- operating cost per vehicle service hour
- passengers per vehicle service hour
- passengers per vehicle service mile
- operating cost per passenger

The performance results in these indicators were developed using information from AC Transit's NTD reports filed with the FTA, which included the EBPC service for the three years of the audit period.

Performance results for the fifth TDA-mandated indicator, vehicle service hours per full-time equivalent employee (FTE), were deemed not applicable since EBPC's services are provided by private contractors, and FTE data is not reported in NTD. The operating contractor is responsible for staffing and employee productivity; therefore, FTE data and results are not included as part of this audit report.

In addition to presenting performance for the three years of the audit period (FY2023 through FY2025), this analysis features two enhancements:

Six-Year Time Period – While the performance audit focuses on the three fiscal years of the audit period, six-year trend lines have been constructed for EBPC's service to provide a longer perspective on performance and to clearly present the direction and magnitude of the performance trends. In this analysis, the FY2023 to FY2025 trend lines

have been combined with those from the prior audit period (FY2020 through FY2022) to define a six-year period of performance.

Normalized Cost Indicators for Inflation – Two financial performance indicators (cost per hour and cost per passenger) are presented in both constant and current dollars to illustrate the impact of inflation in the Bay Area. The inflation adjustment relies on the All-Urban Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for the San Francisco Metropolitan Area. The average CPI-W percent change for each fiscal year has been calculated based on the bi-monthly results reported on the U.S. Department of Labor – Bureau of Labor Statistics website. The CPI-W is used since labor is the largest component of operating cost in transit. Since labor costs are typically controlled through labor contracts, changes in normalized costs largely reflect those factors that are within the day-to-day control of the transit system.

The following discussion is organized to present an overview of EBPC's performance trends in the four TDA performance indicators included. The analysis is also expanded to include a breakdown of the various component costs that contributed to the total and hourly operating costs during the last six years.

EBPC Service Performance Trends

This section provides an overview of the performance of EBPC's bus service over the past six years. The trends in the TDA indicators and input statistics are presented in Exhibit A-4. The six-year trends are illustrated in Exhibits A-4.1 through A-4.3.

- Operating Cost per Vehicle Service Hour (Exhibit A-4.1)
 - A key indicator of cost efficiency, the cost per hour of service increased an average of 8.2 percent annually during the six-year review period.

- The cost per service hour increased in every year of the review period. Cost per hour increased from \$116.48 in FY2020 to \$172.69 in FY2025.
- The largest increase, 30.9 percent, occurred in FY2021, as service hours declined with lower ridership during the COVID-19 pandemic, while operating costs decreased at a lower percentage.
- In FY2020 constant dollars, there was an average annual increase in this indicator of 4.2 percent.
- Passengers per Vehicle Service Hour (Exhibit A-4.2)
 - A key indicator of passenger productivity, passengers per hour decreased an average of 2.5 percent annually during the six-year period.
 - Passengers per hour decreased from 1.6 in FY2020 to 1.1 in FY2021, before rebounding to almost pre-COVID levels of 1.4 by FY2025.
 - The decrease reflects the significant decrease in both passengers and service hours in the prior three-year audit period due to COVID, followed by what appears to be a post-COVID recovery beginning in FY 2022.
- Passengers per Vehicle Service Mile (Exhibit A-4.2)
 - The six-year trend in this indicator decreased by 2.7 percent annually on average.
 - There were 0.12 passengers per mile in FY2020, compared with 0.10 in FY2025, with the lowest measure, 0.09, occurring in FY2021.
 - The pattern in this indicator was the same as passengers per hour, with annual decreases coinciding with the decline in ridership during COVID, followed by improving ridership and increasing service miles during the period between FY2022 and FY 2025.
- Operating Cost per Passenger (Exhibit A-4.3)
 - A key measure of cost effectiveness, cost per passenger was \$71.61 FY2020, increasing to \$133.04 per passenger in FY2021, before ending at \$120.75 per passenger in FY2025.
 - These results, including an 85.8 percent increase in FY2021, are in large part attributed to the above-noted ridership losses seen as a result of the

response to the pandemic, followed by recovering ridership beginning in FY2022.

- Overall, the average annual increase in the cost per passenger during the period was 11 percent. With the impact of inflation removed, the result was an average annual increase of 6.9 percent.

* * * * *

The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:

- There was an average annual increase in the operating cost per hour of 8.2 percent, when adjusted for inflation, amounts to an average annual increase of 4.2 percent in constant dollars.
- The cost per hour ranged from a low of \$116.48 in FY2020 to a high of \$172.69 in FY2025. There were increases in three of the six years, with the largest (30.9 percent) occurring in FY2021.
- Passenger productivity exhibited a modest downward trend, driven by small average annual increases in service hours and miles combined with almost unchanged ridership during the review period. Passengers per vehicle service hour and vehicle service mile declined by 2.5 percent and 2.7 percent per year on average during the period, respectively.
- The cost per passenger increased on average by 11 percent per year, which amounted to an average annual increase of 6.9 percent in constant FY2020 dollars. Operating costs increased 9.5 percent per year on average between FY2020 and FY2025, while ridership moved back toward pre-pandemic levels, finishing the six-year review period with a 1.4 percent annual average decrease.

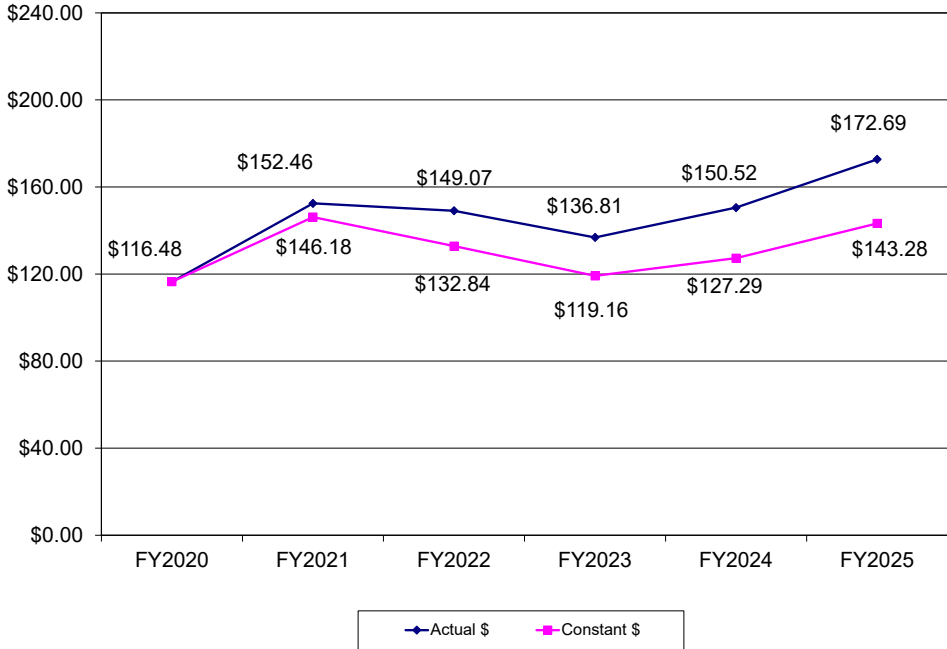
Exhibit 4: TDA Indicator Performance

TDA Performance Indicator	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
Op. Cost per Vehicle Svc. Hour (Actual \$)	\$116.48	\$152.46	\$149.07	\$136.81	\$150.52	\$172.69	- -
<i>Annual Change</i>	- -	30.9%	-2.2%	-8.2%	10.0%	14.7%	8.2%
Op. Cost per Vehicle Svc. Hour (Constant \$)	\$116.48	\$146.18	\$132.84	\$119.16	\$127.29	\$143.28	- -
<i>Annual Change</i>	- -	25.5%	-9.1%	-10.3%	6.8%	12.6%	4.2%
Passengers per Vehicle Service Hour	1.6	1.1	1.3	1.3	1.3	1.4	- -
<i>Annual Change</i>	- -	-29.5%	13.1%	0.5%	0.2%	9.6%	-2.5%
Passengers per Vehicle Service Mile	0.12	0.09	0.10	0.10	0.10	0.10	- -
<i>Annual Change</i>	- -	-27.0%	13.4%	-1.5%	0.5%	6.7%	-2.7%
Op. Cost per Passenger (Actual \$)	\$71.61	\$133.04	\$115.06	\$105.08	\$115.41	\$120.75	- -
<i>Annual Change</i>	- -	85.8%	-13.5%	-8.7%	9.8%	4.6%	11.0%
Op. Cost per Passenger (Constant \$)	\$71.61	\$127.56	\$102.53	\$91.52	\$97.60	\$100.19	- -
<i>Annual Change</i>	- -	78.1%	-19.6%	-10.7%	6.6%	2.7%	6.9%
Vehicle Service Hours per FTE	(a)	(a)	(a)	(a)	(a)	(a)	- -
<i>Annual Change</i>	- -	- -	- -	- -	- -	- -	- -
Bay Area CPI - Annual Change	- -	4.3%	7.6%	2.3%	3.0%	1.9%	- -
<i>Cumulative Change</i>	- -	4.3%	12.2%	14.8%	18.3%	20.5%	3.8%

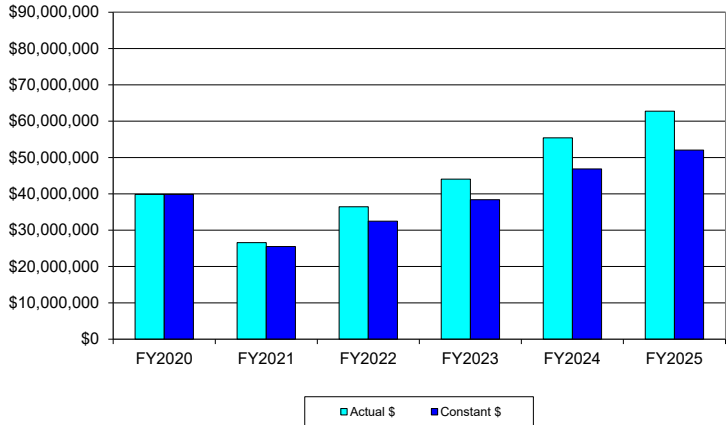
(a) Not applicable as EBPC service is provided by private contractors

Note: FY2020 statistics include one quarter of COVID pandemic influenced indicators

Exhibit 4.1: Operating Cost per Vehicle Service Hour



Operating Cost



Vehicle Service Hours

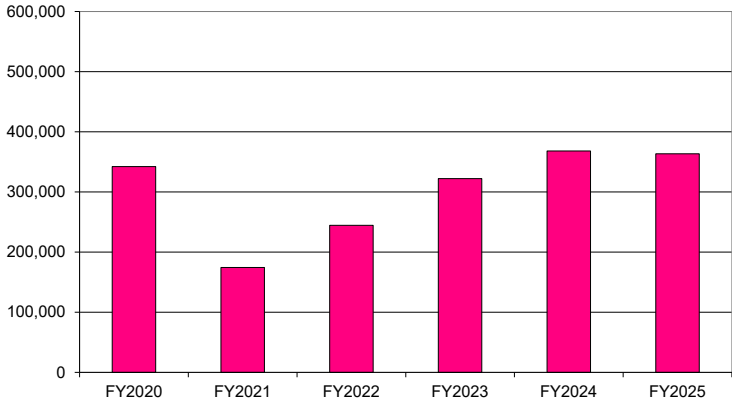
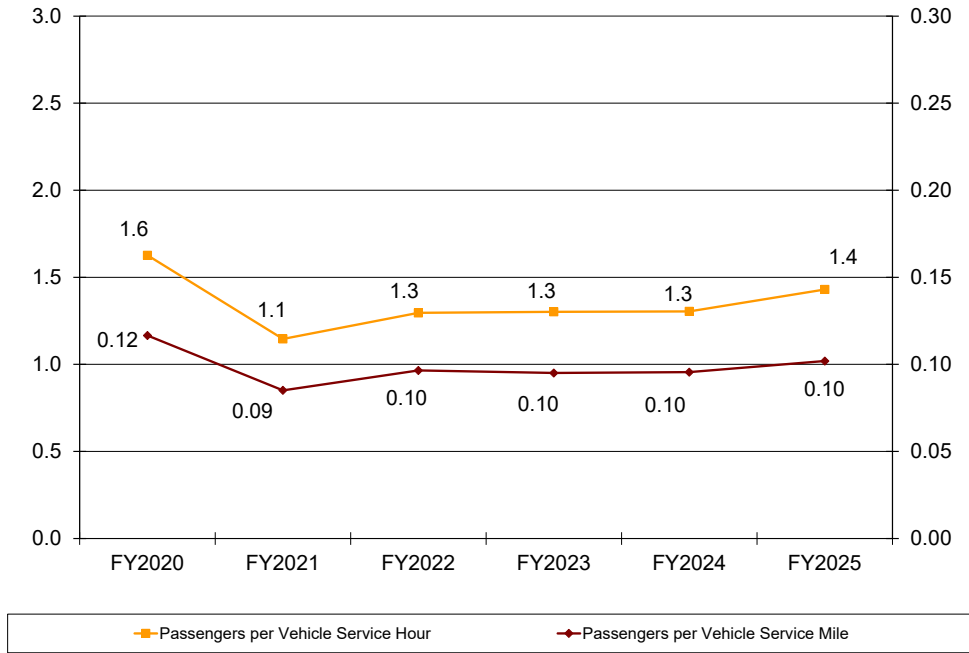
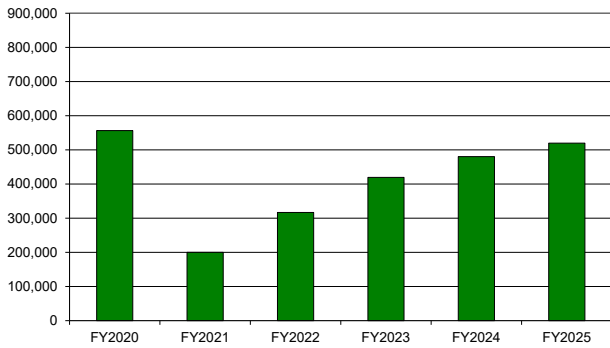


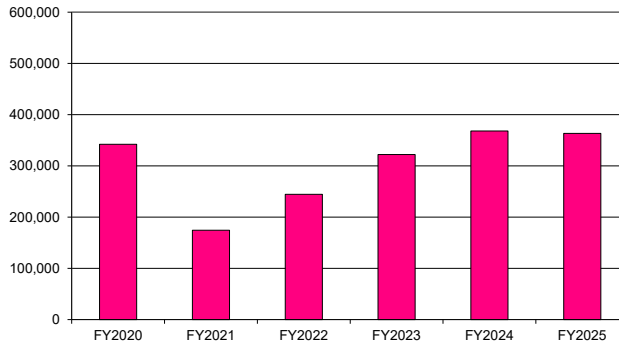
Exhibit 4.2: Passengers per Hour and per Mile



Unlinked Passengers



Vehicle Service Hours



Vehicle Service Miles

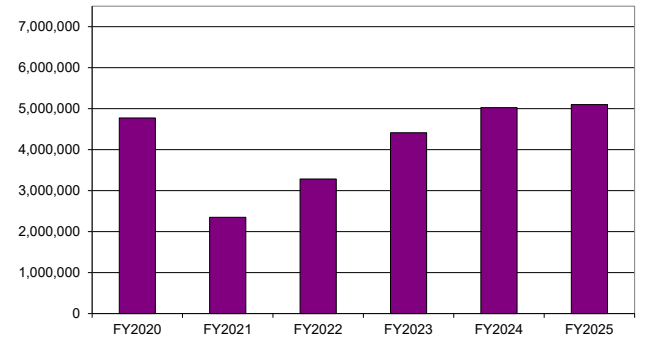
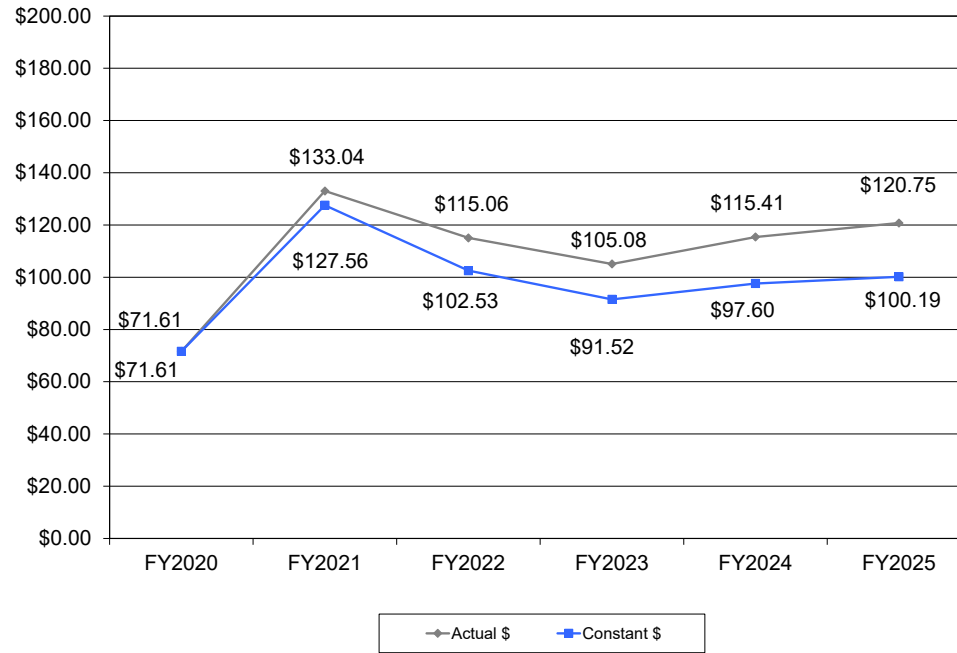
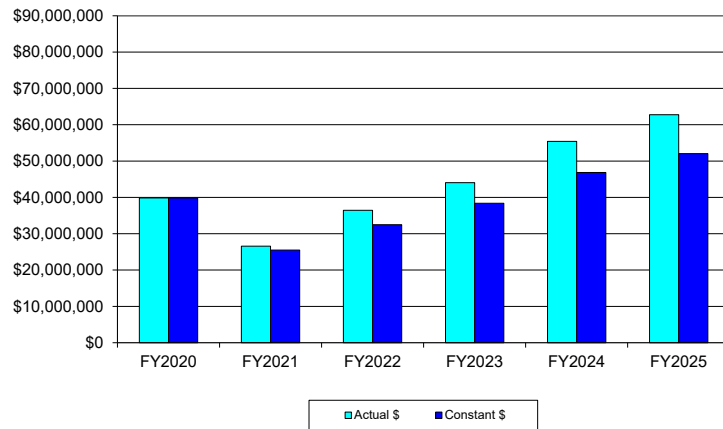


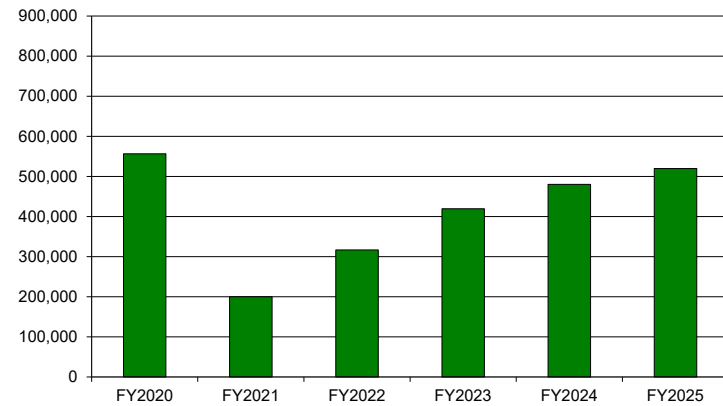
Exhibit 4.3: Operating Cost per Passenger



Operating Cost



Unlinked Passengers



EBPC Service Component Costs

Year-to-year changes in selected operating cost categories over the past six years are presented in Exhibit A-4.4. Examining components of operating costs (e.g., labor, fringes, fuel, and casualty/liability) may determine what particular components had the most significant impacts on the operating costs. Exhibit A-4.4 also shows the concurrent changes in vehicle service hours, and Exhibit A-4.5 illustrates the portion of the cost per bus service hour that can be attributed to each included cost component.

- Between FY2020 and FY2025, the total average annual costs increased by 9.5 percent per year, driven by the average annual decrease in purchased transportation costs throughout the period.
- Purchased transportation increased on average by 9.7 percent annually and comprised about 98 percent of total cost per vehicle hour in all years. The effect of the COVID pandemic is seen in FY2021, as purchased transportation costs decreased by about 33 percent in FY2021, then increased in every following fiscal year as service levels began to recover.
- In-house (non-contracted) labor and fringe benefit costs increased by 5.8 and 5.7 percent per year respectively over the six year review period. In total, labor and fringe benefit costs comprised under two percent of the total costs each year.
- Services costs were sporadic, with charges only recorded for fiscal years 2020 and 2024.
- The remaining cost categories of materials/supplies, casualty/liability, and miscellaneous other expenses comprised less than two tenths of one percent of the total operating costs over the analysis period, although casualty/liability costs did show a 45 percent average annual increase over the review period. The increase in casualty/liability costs was attributed to increased claims by riders instigated by financial litigators, who entice injured persons to enter into file legal action at no cost to them until the case is settled in their favor. EBPC also added two new service contractors, increasing the number of personnel requiring insurance coverage.

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The following is a brief summary of the component operating costs trend highlights between FY2020 and FY2025:

- Purchased transportation costs represented the largest portion of the total operating costs by far, comprising about 98 percent of total costs over the six-year period.
- Purchased transportation increased an average of 9.7 percent annually, almost identical to the 9.5 percent overall increase in operating costs over the analysis period.
- In total, in-house (non-contracted) labor and fringe benefit costs comprised less than two percent of the total costs in during the analysis period. Labor costs increased an annual average of 5.8 percent, while fringes increased an average of 5.7 percent per year.
- Materials/supplies decreased an average of 13.5 percent per year. Services costs were sporadic throughout the analysis period, only being recorded in 2020 and 2024.
- There was an average yearly 45 percent increase in the casualty/liability category, although these expenses comprised less than one tenth of one percent of the annual total operating costs. The casualty/liability cost increases were attributed to an increase in injury claims and the addition of two contract service providers, requiring an increase in insurance coverage.

Exhibit 4.4: Component Cost Trends

	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Av. Ann. Chg.
COST CATEGORIES							
Labor (Salaries/Wages)	\$386,161	\$361,580	\$381,212	\$391,901	\$483,105	\$512,458	--
<i>Annual Change</i>	--	-6.4%	5.4%	2.8%	23.3%	6.1%	5.8%
Fringe Benefits (a)	\$254,284	\$244,615	\$258,801	\$251,965	\$331,085	\$335,115	--
<i>Annual Change</i>	--	-3.8%	5.8%	-2.6%	31.4%	1.2%	5.7%
Services	\$176,496	\$0	\$0	\$0	\$225,000	\$0	--
<i>Annual Change</i>	--	-100.0%	--	--	100.0%	-100.0%	-100.0%
Purchased Transportation	\$39,004,457	\$25,948,696	\$35,776,496	\$43,372,974	\$54,308,037	\$61,841,874	--
<i>Annual Change</i>	--	-33.5%	37.9%	21.2%	25.2%	13.9%	9.7%
Materials/Supplies (b)	\$15,018	\$13,024	\$10,910	\$12,077	\$16,975	\$7,282	--
<i>Annual Change</i>	--	-13.3%	-16.2%	10.7%	40.6%	-57.1%	-13.5%
Casualty/Liability	\$6,296	\$9,018	\$16,780	\$21,814	\$35,993	\$40,312	--
<i>Annual Change</i>	--	43.2%	86.1%	30.0%	65.0%	12.0%	45.0%
Other Expenses (c)	\$4,917	\$7,105	\$4,405	\$6,654	\$7,312	\$7,372	--
<i>Annual Change</i>	--	44.5%	-38.0%	51.1%	9.9%	0.8%	8.4%
Total	\$39,847,629	\$26,584,038	\$36,448,604	\$44,057,385	\$55,407,507	\$62,744,413	--
<i>Annual Change</i>	--	-33.3%	37.1%	20.9%	25.8%	13.2%	9.5%
OPERATING STATISTICS							
Vehicle Service Hours	342,100	174,372	244,506	322,042	368,102	363,333	--
<i>Annual Change</i>	--	-49.0%	40.2%	31.7%	14.3%	-1.3%	1.2%

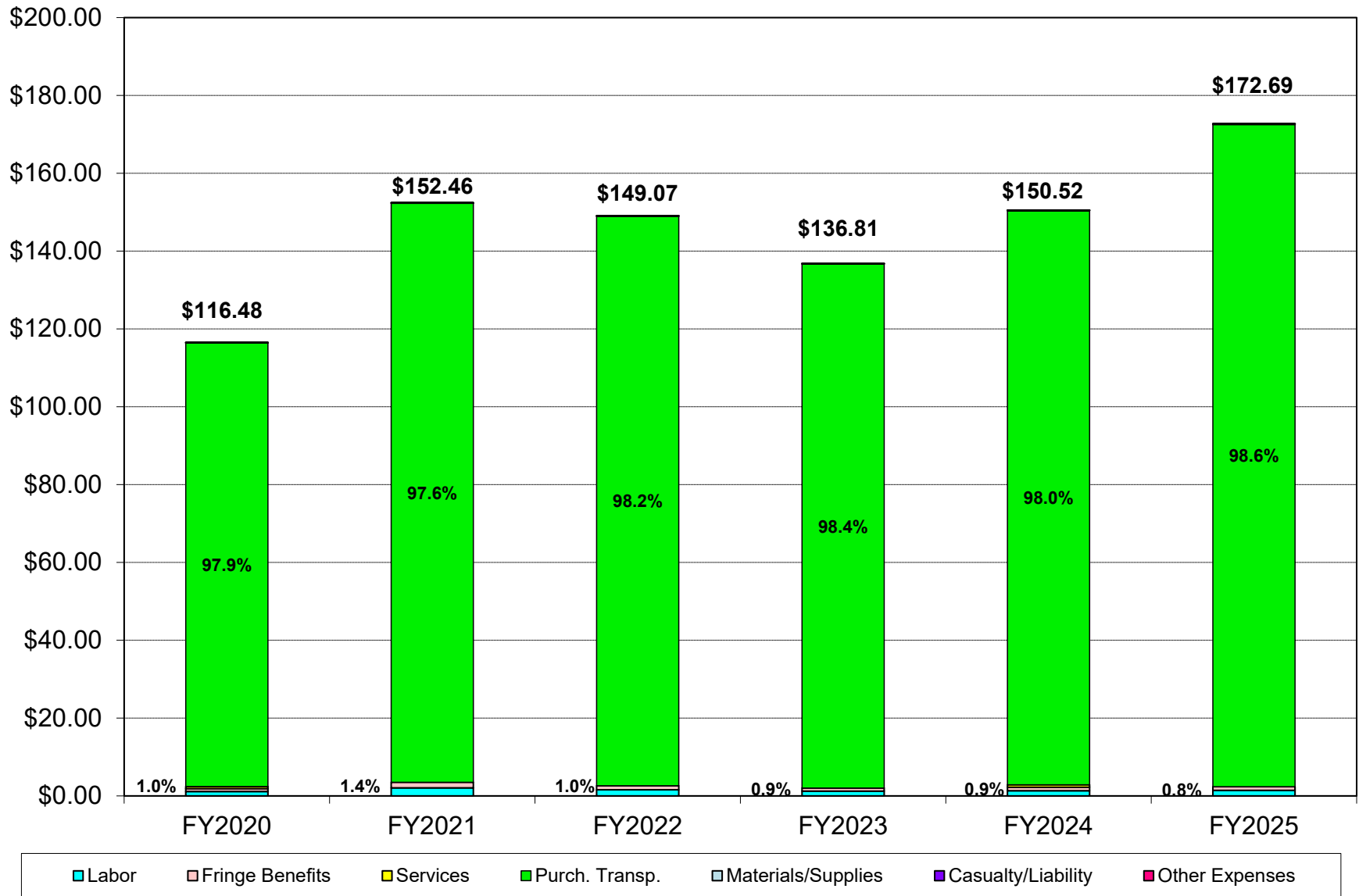
(a) Includes paid absences

(b) Includes tires/tubes, fuels/lubricants, and other materials/supplies

(c) Includes utilities, taxes, and miscellaneous expenses

Note: New operations contract beginning Jan. 2025 changes payment structure with contractor from Cost Plus Fixed Fee to Lump Sum payment that includes a fixed fee, which may influence future purchased transportation cost trends.

Exhibit 4.5: Distribution of Component Costs
Operating Cost per Vehicle Service Hour



IV. STATUS OF PRIOR AUDIT RECOMMENDATIONS

EBPC's prior performance audit was completed in June 2024. Generally, MTC has used the audit recommendations as the basis for developing the Productivity Improvement Program (PIP) projects the operator is required to complete. MTC tracks PIP project implementation as part of its annual review of the operator's TDA-STA claim application. This section provides an assessment of actions taken by TDA-STA recipients toward implementing the recommendations advanced in the prior audit. This assessment provides continuity between the current and prior audits, which allows MTC to fulfill its obligations where the recommendations were advanced as PIP projects.

This review would address EBPC's responses to the recommendations made in the prior performance audit, and whether EBPC made reasonable progress toward their implementation. However, there were no recommendations made in EBPC's prior audit.

V. FUNCTIONAL PERFORMANCE INDICATOR TRENDS

To further assess EBPC's performance over the past three years, a detailed set of functional area performance indicators was defined. This assessment consists of a three-year trend analysis of the functions in each of the following areas:

- Service Planning
- Operations
- Maintenance
- Safety

The indicators selected for this analysis were primarily those that were tracked regularly by EBPC or for which input data were maintained by EBPC on an on-going basis, such as performance reports, contractor reports, annual financial reports and NTD reports. As such, there may be some overlap with the TDA indicators examined earlier in the audit process, but most indicators will be different. Some indicators were selected from the California Department of Transportation's Performance Audit Guidebook for Transit Operators and Regional Transportation Planning Entities as being appropriate for this evaluation. The input statistics for the indicators, along with their sources, are contained in Appendix C at the end of this report.

The trends in performance are presented over the three-year audit period to give an indication of which direction performance is moving for these indicators. EBPC's functional area trends represent areas of cost efficiency, safety, productivity, and service reliability. Audit period performance is discussed below and presented in Exhibit B-5.

- Service Planning
 - Operating costs per passenger mile increased 9.3 percent overall from \$11.23 in FY2023 to \$12.28 in FY2025, reflecting increasing costs and slower

increases in service miles as EBPC service continues to recover from the effects of the COVID pandemic.

- About 82 percent of all vehicle miles traveled were in service in all three years, while vehicle service hours compared to total hours traveled averaged about 87 percent annually.
- The farebox recovery ratio decreased from 3.7 percent in the first year to 3.2 percent in the last year, about 15 percent overall.
- Operations
 - Vehicle operations costs increased slightly from 79.4 percent of total operating costs in FY2023, to 80.7 percent by FY2025.
 - Vehicle operations costs per service hour increased more than 28 percent from \$108.65 in FY2023 to \$139.40 in FY2025, again reflecting a slower recovery in service hours than in operating costs from the pandemic.
 - Schedule adherence decreased slightly overall by 2.2 percent, from about 97 percent to 95 percent.
 - The rate of complaints per 10,000 passenger trips increased by 15 percent overall between FY2023 to FY2025, an increase of about 500 complaints in actual numbers.
 - The incidence of missed trips per total trips scheduled doubled during the audit period but remained low, increasing from 0.15 percent to 0.3 percent overall.
 - The percentage of ADA trip denials was very low throughout the audit period at less than one-tenth of one percent of total trips scheduled.
 - The rate of total trip cancellations decreased from about 27 percent to 24 percent of total trips scheduled. The occurrence of late trip cancellations (less than one hour before scheduled pick-up time) and rider-fault no-shows also decreased from 3.8 percent to 1.7 percent of total trips over the three years.
- Maintenance
 - Total maintenance costs decreased almost 20 percent over the period, from two percent of total operating costs in FY2023 to 1.6 percent in FY2025.

- Vehicle maintenance costs per service mile fluctuated from year to year but remained unchanged overall at \$0.19 in the first and last years of the period.
- The vehicle spare ratio increased from 15.9 percent in FY2023 to 19.2 percent in FY2025.
- The mean distance between major failures improved overall by more than 50 percent. The mean distance between all failures decreased by about 12 percent over the three years.
- Safety
 - The rate of preventable accidents decreased, from 3.1 to 2.6 per 100,000 miles travelled, a decrease of 16 percent.

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The following is a brief summary of EBPC’s functional trend highlights between FY2023 and FY2025:

- Service Planning results showed a 9.3 percent increase in operating cost per passenger mile, the percentage of vehicle miles and vehicle hours in service averaging around 82 percent and 87 percent, respectively, and the farebox recovery ratio decreasing from 3.7 percent to 3.2 percent overall.
- Operations results showed a slight uptick of 1.6 percent in vehicle operations cost per total costs but a 28 percent increase in operating cost per vehicle service hour. This reflects an almost 20 percent increase in operating costs outpacing the 6.2 percent increase in service hours during the current audit period. Schedule adherence declined slightly from 97 to 95 percent, and there was about a 15 percent overall increase in the rate of complaints. The missed trip rate doubled percentage wise but was still less than one percent of total trips throughout the audit period. Capacity trip denials decreased by more than 40 percent, while total trip cancellations decreased 9 percent and late trip cancellations/rider fault no-shows decreased over 50 percent overall.
- Maintenance results included total maintenance costs decreasing from two percent to 1.6 percent of total operating costs over the period, while vehicle

maintenance costs per service mile remained unchanged. The spare ratio increased from 16 to 19 percent during the audit period. Vehicle reliability was mixed as there was significant overall improvement (greater than 50 percent) for the major mechanical failure rate but distance between all mechanical failures decreased by 12 percent.

- Safety performance improved, with the incidence of preventable accidents reported decreasing about 16 percent with the actual rate dropping below three accidents per 100,000 vehicle miles in the last two years of the audit period.

Exhibit 5: Functional Performance Trends – EBPC

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
SERVICE PLANNING			
Total Operating Cost/Passenger Mile	\$11.23	\$11.97	\$12.28
<i>Annual Percent Change</i>	--	6.6%	2.6%
<i>Three Year Percent Change</i>	--	--	9.3%
Vehicle Service Miles/Total Miles	82.0%	82.2%	82.5%
<i>Annual Percent Change</i>	--	0.2%	0.4%
<i>Three Year Percent Change</i>	--	--	0.6%
Vehicle Service Hours/Total Hours	86.6%	86.3%	86.2%
<i>Annual Percent Change</i>	--	-0.2%	-0.2%
<i>Three Year Percent Change</i>	--	--	-0.4%
Farebox Recovery Ratio (Farebox Rev./Oper. Cost)	3.7%	3.4%	3.2%
<i>Annual Percent Change</i>	--	-8.1%	-7.0%
<i>Three Year Percent Change</i>	--	--	-14.5%
OPERATIONS			
Vehicle Operations Cost/Total Operating Cost	79.4%	81.3%	80.7%
<i>Annual Percent Change</i>	--	2.3%	-0.7%
<i>Three Year Percent Change</i>	--	--	1.6%
Vehicle Operations Cost/Vehicle Service Hour	\$108.65	\$122.35	\$139.40
<i>Annual Percent Change</i>	--	12.6%	13.9%
<i>Three Year Percent Change</i>	--	--	28.3%
On-Time Percentage	96.9%	96.4%	94.8%
<i>Annual Percent Change</i>	--	-0.5%	-1.7%
<i>Three Year Percent Change</i>	--	--	-2.2%
Complaints/10,000 Unlinked Passenger Trips	25.45	29.14	29.31
<i>Annual Percent Change</i>	--	14.5%	0.6%
<i>Three Year Percent Change</i>	--	--	15.2%
Missed Trips/Total Trips Scheduled	0.15%	0.16%	0.30%
<i>Annual Percent Change</i>	--	12.4%	82.8%
<i>Three Year Percent Change</i>	--	--	105.4%

FUNCTION/Indicator	Actual Performance		
	FY2023	FY2024	FY2025
OPERATIONS, continued			
Trip Cancellations/Total Trips Scheduled	26.8%	25.6%	24.4%
<i>Annual Percent Change</i>	--	-4.6%	-4.7%
<i>Three Year Percent Change</i>	--	--	-9.1%
Late Trip Cancels & No Shows/Total Trips Scheduled	3.8%	2.9%	1.7%
<i>Annual Percent Change</i>	--	-24.4%	-42.3%
<i>Three Year Percent Change</i>	--	--	-56.4%
ADA Trip Denials/Total Trips Scheduled	0.02%	0.02%	0.01%
<i>Annual Percent Change</i>	--	-1.2%	-42.6%
<i>Three Year Percent Change</i>	--	--	-43.3%
MAINTENANCE			
Vehicle + Non-Veh. Maint. Cost/Total Operating Cost	2.0%	2.2%	1.6%
<i>Annual Percent Change</i>	--	11.3%	-27.6%
<i>Three Year Percent Change</i>	--	--	-19.4%
Vehicle Maintenance Cost/Vehicle Service Mile	\$0.19	\$0.24	\$0.19
<i>Annual Percent Change</i>	--	23.2%	-18.3%
<i>Three Year Percent Change</i>	--	--	0.7%
Spare Vehicles/Total Vehicles	15.9%	16.7%	19.2%
<i>Annual Percent Change</i>	--	5.1%	15.2%
<i>Three Year Percent Change</i>	--	--	21.0%
Mean Distance between Major Failures (Miles)	86,746	165,272	131,456
<i>Annual Percent Change</i>	--	90.5%	-20.5%
<i>Three Year Percent Change</i>	--	--	51.5%
Mean Distance between All Failures (Miles)	40,438	35,144	35,508
<i>Annual Percent Change</i>	--	-13.1%	1.0%
<i>Three Year Percent Change</i>	--	--	-12.2%
SAFETY			
Preventable Accidents/100,000 Vehicle Miles	3.1	2.7	2.6
<i>Annual Percent Change</i>	--	-13.6%	-2.8%
<i>Three Year Percent Change</i>	--	--	-16.1%

VI. CONCLUSIONS AND RECOMMENDATIONS

This report has presented the findings of the compliance audit portion of the performance audit of EBPC during the three-year period of FY2023 through FY2025 (July 1, 2022 through June 30, 2025). It has focused on TDA compliance issues including trends in TDA-mandated performance indicators. It also provides the findings from an overview of EBPC's data collection activities to support the TDA indicators.

The key findings and conclusions from the individual sections of this performance audit are summarized below:

Data Collection – EBPC is in compliance with the data collection and reporting requirements for all five TDA statistics. Additionally, the statistics collected over the six-year review period appear to indicate general consistency in terms of the direction and magnitude of the year-to-year changes across the statistics.

TDA Performance Trends – EBPC's performance trends for the five TDA-mandated indicators were analyzed by mode. A six-year analysis period was used for all the indicators. In addition, component operating costs were analyzed.

- TDA Performance Indicators – The following is a brief summary of the TDA performance trend highlights over the six-year period of FY2020 through FY2025:
 - There was an average annual increase in the operating cost per hour of 8.2 percent, when adjusted for inflation, amounts to an average annual increase of 4.2 percent in constant dollars.
 - The cost per hour ranged from a low of \$116.48 in FY2020 to a high of \$172.69 in FY2025. There were increases in three of the six years, with the largest (30.9 percent) occurring in FY2021.

- Passenger productivity exhibited a modest downward trend, driven by small average annual increases in service hours and miles combined with almost unchanged ridership during the review period. Passengers per vehicle service hour and vehicle service mile declined by 2.5 percent and 2.7 percent per year on average during the period, respectively.
- The cost per passenger increased on average by 11 percent per year, which amounted to an average annual increase of 6.9 percent in constant FY2020 dollars. Operating costs increased 9.5 percent per year on average between FY2020 and FY2025, while ridership moved back toward pre-pandemic levels, finishing the six-year review period with a 1.4 percent annual average decrease.
- Component Costs – The following is a brief summary of the component operating cost trend highlights between FY2020 and FY2025:
 - Purchased transportation costs represented the largest portion of the total operating costs by far, comprising about 98 percent of total costs over the six-year period.
 - Purchased transportation increased an average of 9.7 percent annually, almost identical to the 9.5 percent overall increase in operating costs over the analysis period.
 - In total, in-house (non-contracted) labor and fringe benefit costs comprised less than two percent of the total costs in during the analysis period. Labor costs increased an annual average of 5.8 percent, while fringes increased an average of 5.7 percent per year.
 - Materials/supplies decreased an average of 13.5 percent per year. Services costs were sporadic throughout the analysis period, only being recorded in 2020 and 2024.
 - There was an average yearly 45 percent increase in the casualty/liability category, although these expenses comprised less than one tenth of one percent of the annual total operating costs. The casualty/liability cost increases were attributed to an increase in injury claims and the addition of two contract service providers, requiring an increase in insurance coverage.

Status of Prior Audit Recommendations – There were no recommendation made in EBPC’s prior performance audit.

Functional Performance Indicator Trends - To further assess EBPC's performance over the past three years, a detailed set of functional area performance indicators was defined and reviewed. The following is a brief summary of the functional trend highlights between FY2023 and FY2025:

- Service Planning results showed a 9.3 percent increase in operating cost per passenger mile, the percentage of vehicle miles and vehicle hours in service averaging around 82 percent and 87 percent, respectively, and the farebox recovery ratio decreasing from 3.7 percent to 3.2 percent overall.
- Operations results showed a slight uptick of 1.6 percent in vehicle operations cost per total costs but a 28 percent increase in operating cost per vehicle service hour. This reflects an almost 20 percent increase in operating costs outpacing the 6.2 percent increase in service hours during the current audit period. Schedule adherence declined slightly from 97 to 95 percent, and there was about a 15 percent overall increase in the rate of complaints. The missed trip rate doubled percentage wise but was still less than one percent of total trips throughout the audit period. Capacity trip denials decreased by more than 40 percent, while total trip cancellations decreased 9 percent and late trip cancellations/rider fault no-shows decreased over 50 percent overall.
- Maintenance results included total maintenance costs decreasing from two percent to 1.6 percent of total operating costs over the period, while vehicle maintenance costs per service mile remained unchanged. The spare ratio increased from 16 to 19 percent during the audit period. Vehicle reliability was mixed as there was significant overall improvement (greater than 50 percent) for the major mechanical failure rate but distance between all mechanical failures decreased by 12 percent.
- Safety performance improved, with the incidence of preventable accidents reported decreasing about 16 percent with the actual rate dropping below three accidents per 100,000 vehicle miles in the last two years of the audit period.

Recommendations

No recommendations are suggested for EBPC based on the results of this triennial performance audit.

**APPENDIX C:
EBPC - INPUT STATISTICS FOR
FUNCTIONAL PERFORMANCE MEASURES**

Functional Performance Inputs – EBPC

Data Item	FY2023	FY2024	FY2025	Source
Vehicle Service Miles	4,411,277	5,025,019	5,099,390	NTD S-10 DR
Total Vehicle Miles	5,378,223	6,115,081	6,178,440	NTD S-10 DR
Vehicle Service Hours	322,042	368,102	363,333	NTD S-10 DR
Total Vehicle Hours	372,032	426,303	421,614	NTD S-10 DR
Unlinked Passenger Trips	419,288	480,098	519,603	NTD S-10 DR
Farebox Revenue	\$1,628,832	\$1,882,757	\$1,982,315	NTD F-10 DR
Total Operating Costs	\$44,057,390	\$55,407,510	\$62,744,413	NTD F-30 DR
Passenger Miles	3,921,587	4,627,850	5,109,361	NTD S-10 DR
Vehicle Operations Costs	\$34,990,980	\$45,036,842	\$50,647,297	NTD F-30 DR
Trips On-Time	96.9%	96.4%	94.8%	EBPC Monthly Performance Indicator Report (June YTD)
Total Trips	419,288	480,098	519,603	EBPC Monthly Performance Indicator Report (June YTD)
Total Complaints	1,067	1,399	1,523	EBPC Monthly Performance Indicator Report (June YTD)
Missed Trips	610	785	1,553	Denial Summary Report
ADA Trip Denials	84	95	59	EBPC Monthly Performance Indicator Report (June YTD)
Trip Cancellations	112,443	122,770	126,598	EBPC Monthly Performance Indicator Report (June YTD)
Late Trip Cancellations & No Shows	16,065	13,912	8,690	EBPC Monthly Performance Indicator Report (June YTD)
Vehicle Maintenance Costs	\$847,105	\$1,189,292	\$986,303	NTD F-30 DR
Non-Vehicle (Facility) Maintenance Costs	\$42,392	\$55,869	\$34,473	NTD F-30 DR

Data Item	FY2023	FY2024	FY2025	Source
Spare Vehicles (Total less Maximum Service)	33	36	43	NTD S-10 DR
Total Vehicles	208	216	224	NTD S-10 DR
Revenue Vehicle Mechanical System Failures - Total	133	174	174	NTD R-20 DR
Revenue Vehicle Mechanical System Failures - Major	62	37	47	NTD R-20DR
Preventable Accidents	167	164	161	Field Monitor Report (YTD)
Casualty/Liability Costs	\$21,814	\$35,993	\$40,312	NTD F-30 DR