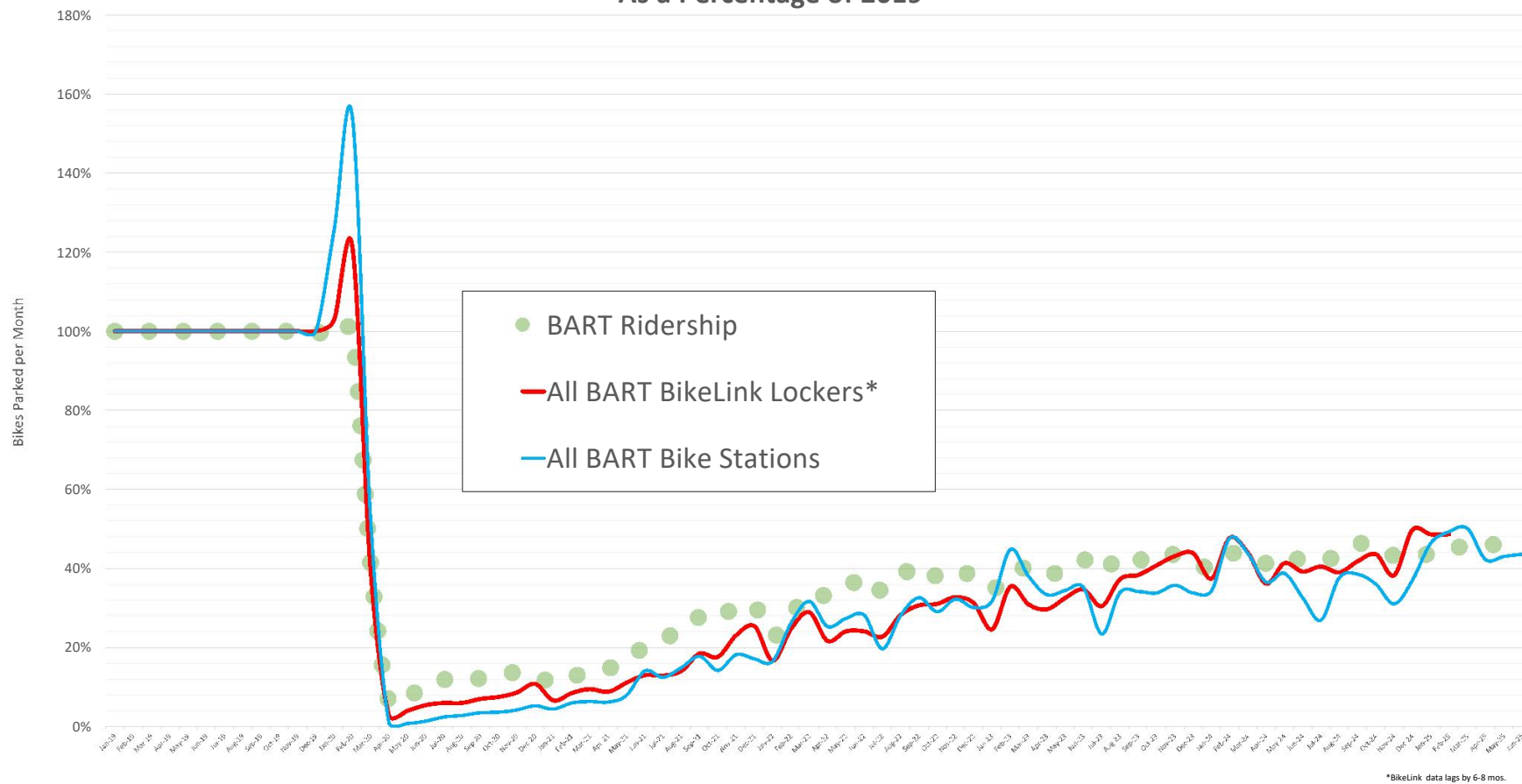


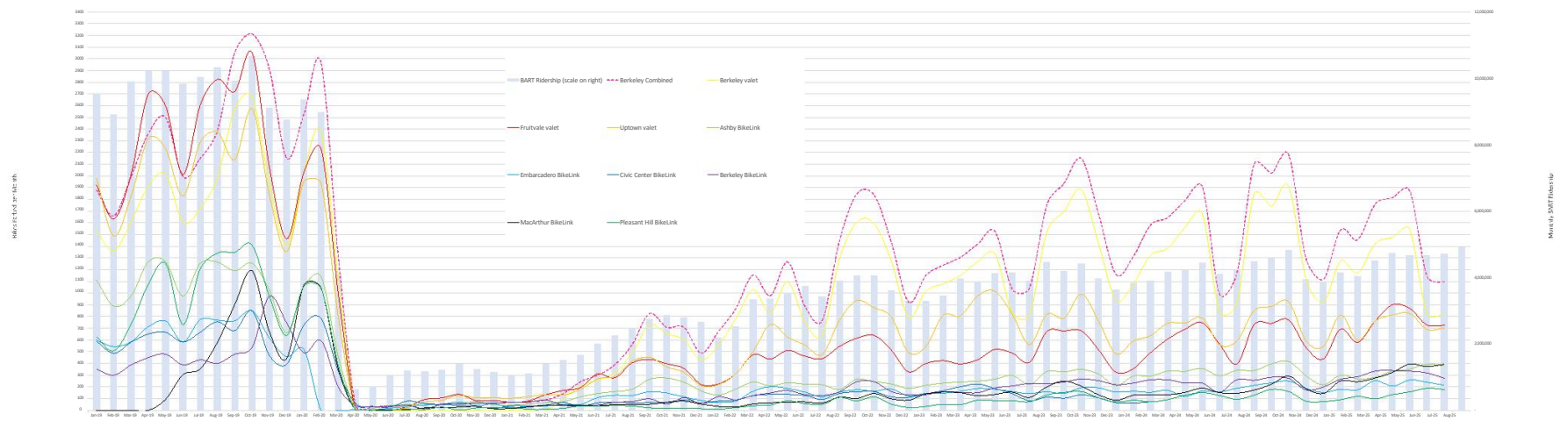


Monthly BART Secure Bike Parking Usage and BART Ridership As a Percentage of 2019



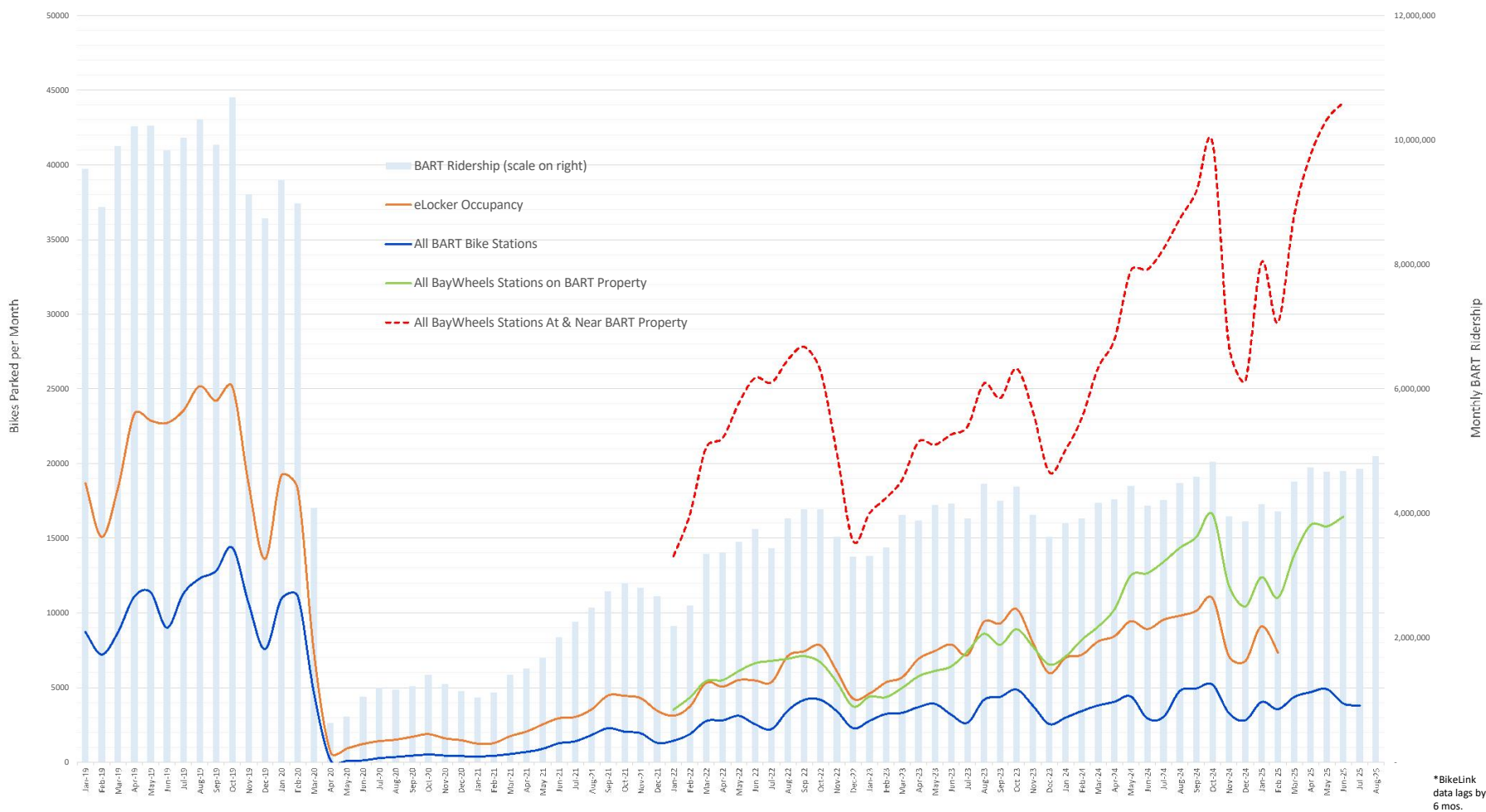


Monthly Volumes at BART Bike Stations & BART Ridership
Jan 2019-Jul 2025



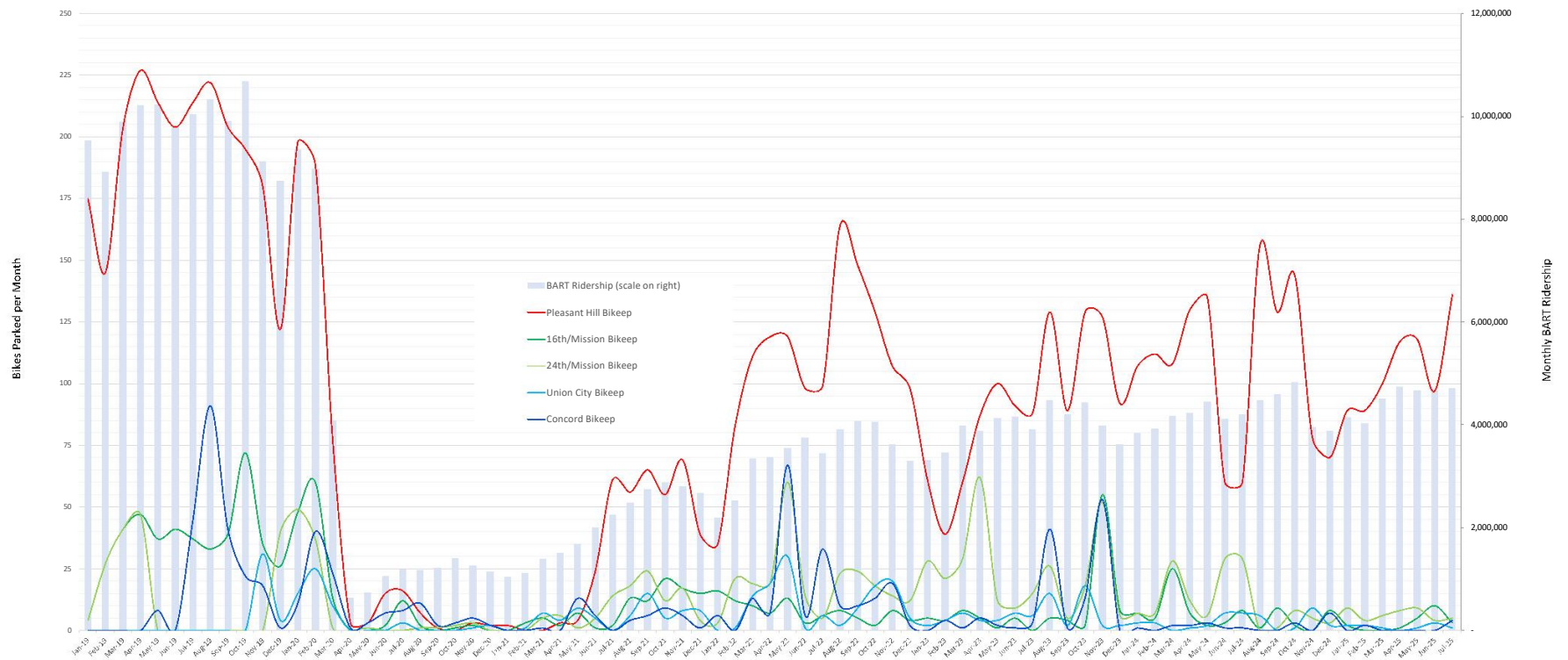


Monthly BikeLink Lockers, BART Bike Stations, Bike Sharing and BART Ridership Jan 2019-Jul 2025





Monthly Volumes at BART Bikeeep Smart Racks & BART Ridership Jan 2019-Jul 2025



Heath Maddox

From: Heath Maddox
Sent: Wednesday, August 13, 2025 5:00 PM
To: [REDACTED]
Cc: Webcustomerservices
Subject: RE: Case 00365977: Bikes on first car [ref:!00Dd00hrYV.!500VI0efnnd:ref]

Dear Colin,

Thanks for writing about the restriction against bringing bikes on the first BART car.

The reasoning behind the rule is that in the event of an emergency, the train operator needs to have a quick, unimpeded path through the first car to emergency controls and/or to render assistance to customers.

And the reason the first car has a bike priority area is that BART trains do not turn around at the end of the line. Rather, they reverse direction, so the first car becomes the last car and vice-versa.

I'm working on improving customer communications to increase awareness of and access to the BART bike rules that I hope will help alleviate confusion.

Regarding the rule change to allow bikes on most BART escalators: this was no small thing, as escalators are one of the biggest, if not the biggest source of injury claims against BART, and there is no shortage of alarming injuries resulting from customers losing control of their bikes on BART escalators. No other transit agency that I am aware of allows bicycles on escalators, so that rule change took a leap of faith for BART, and I'm relieved to say that preliminary results appear to show that there has not been a significant increase in escalator/bike related injury incidents since the rule change.

Sincerely,

Heath Maddox
Manager of Bicycle Access Programs
Bay Area Rapid Transit District
2150 Webster Street, 8th Floor
Oakland, CA 94612
415.728.1352

=====
Case 00365977: Bikes on first car

Contact Name: Colin Patterson
Contact Email: [REDACTED]

Incident Date:
Case opened Date:8/11/2025 7:38 AM
Category: Policies
Sub-category: Bike in first car.

Hello, i am requesting you reverse the rule about no bikes on the first car. People do not know about this rule or understand why. It just leads to delays in travel when the conductor stops the train and walks out of the cab to tell people to move. There are bike racks in the first car so the rule does not make sense. It also crowds the other train cars while empty bike spots are available jn the first car. It does not promote cycling or encourage folks to bike to bart. It took too long for bart to undo the no bikes in the escalator rule which was also ridiculous. Thank you.
ref:!00Dd00hrYV.!500VI0efndd:ref

Heath Maddox

From: Heath Maddox
Sent: Wednesday, August 13, 2025 4:32 PM
To: [REDACTED]
Cc: Webcustomerservices
Subject: RE: Case 00365992: Bike Space on eBART [ref:!00Dd00hrYV.!500VI0egXa1:ref]

Dear Dani,

Thanks for reaching out about the lack of dedicated space for bikes and conflicts with customers congregating near the doors on the e-BART cars.

This is an issue we are aware of, and you are not the first to comment on it.

I'm still working on gathering details, but my understanding is that there is an effort underway that's intended to offer relief.

Please stand by, and I will report back as soon as I learn more.

Sincerely,

Heath Maddox
Manager of Bicycle Access Programs
Bay Area Rapid Transit District
2150 Webster Street, 8th Floor
Oakland, CA 94612
415.728.1352

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

From: Webcustomerservices <webcustomerservices@bart.gov>
Sent: Monday, August 11, 2025 3:16 PM
To: Heath Maddox <hmaddox@bart.gov>
Subject: RE: Case 00365992: Bike Space on eBART [ref:!00Dd00hrYV.!500VI0egXa1:ref]

Hello Heath,

Please see below.

Regards,

BART Customer Services

=====
Case 00365992: Bike Space on eBART

Contact Name: Dani Lanis

Contact Phone: [REDACTED]

Contact Email: [REDACTED]

Incident Date:

Case opened Date: 8/11/2025 9:26 AM

Category: Bikes

Hello,

There's no dedicated space for bicycles on the e-train. Unless one is the first to board and takes the space against one of the walls, against the folding chairs, one ends up sandwiched between passengers sitting on folding chairs on both sides, in the middle of the hallway, obstructing the path for all other users. This is the experience on a regular bike, It's much worse if the bicycle is bigger like a cargo e-bike or if the bike has a trailer attached. I urge you to find a solution. I'll suggest something based on my observations: It seems like people prefer to seat close to the door, leaving empty space in the back. Maybe there can be a reconfiguration of the space? Maybe taking a few rows of seats that are often empty would allow for bicycle priority space similar to the regular BART trains?

Hopeful,

ref:!00Dd00hrYV.!500VI0egXa1:ref

Heath Maddox

From: Heidi Skolnik [REDACTED]
Sent: Monday, September 8, 2025 10:43 AM
To: Heath Maddox
Subject: Re: Case 00367538: E-bikes on BART

Hi Heath-

Thanks so much for getting back to me. I don't recall exactly, but it was probably most like the yellow one :) Definitely was not one with the child bucket in front (although that does bring back happy memories of Amsterdam traffic:)

The time I saw an actual safety issue taking place was on a MUNI bus where the bike was blocking people from going up or down the aisle. I'd seen that just a few days before I sent my message, so I guess it was on my mind. I did not actually see how the bike I saw on the BART platform worked out once inside the car.

Glad to know your role exists; I really appreciate that I and others can bring our (non-e) bikes on BART. I guess some e-bikes would fit in the space set aside for bikes.

Thanks-
Heidi S.

On Fri, Sep 5, 2025 at 3:45 PM Heath Maddox <hmaddox@bart.gov> wrote:

Dear Heidi,

Thanks for your note about oversize e-bikes on BART trains.

Especially with electric assist becoming so ubiquitous lately, large bikes are certainly proliferating. We haven't yet observed any access issues on BART and yours is the first such inquiry we've received.

Out of curiosity, can you clarify if the e-bike you describe below was an electric assist cargo bike of some kind with a box in front or extended wheelbase like one of these?:



Or was it perhaps a motorized “cycle” like this?:

Business



Sincerely,

Heath Maddox

Manager of Bicycle Access Programs

Bay Area Rapid Transit District

[2150 Webster Street](#), 8th Floor

Oakland, CA 94612

415.728.1352



CUSTOMER ACCESS & ACCESSIBILITY
DEPARTMENT

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

From: BART Customer Service webcustomerservices@bart.gov

Sent: Thursday, September 4, 2025 10:35 AM

To: Heath Maddox hmaddox@bart.gov

Subject: RE: Case 00367538: E-bikes on BART [ref:!00Dd00hrYV.!500VI0gHca9:ref]

Hi Heath,

See email below.

Regards,

Casey King

BART Customer Services

=====

Case 00367538: E-bikes on BART

Contact Name: Heidi Skolnik

Contact Phone: [REDACTED]

Contact Email: [REDACTED]

Incident Date: 8/31/2025

Case opened Date: 8/31/2025 11:43 AM

Category: Trains

Sub-category: Trains Misc.

Hello- I see the policies on the website but am concerned about the size of some e bikes, ones that are the size of a small motorcycle or def the size of a moped and bulkier. A rider is about to board with a vehicle that is larger than any moped I have seen. I believe it's a potential safety issue. They block [access.is](#) BART considering this issue?

ref:!00Dd00hrYV.!500VI0gHca9:ref

Heath Maddox

From: Abhay Shah [REDACTED]
Sent: Monday, September 8, 2025 1:26 PM
To: Heath Maddox
Subject: Re: Case 00367694: E-bike policy [ref:!00Dd00hrYV.!500VI0gUKvZ:ref]

That is some awesome and valuable information! Thank you so much, Heath.

And yes, I couldn't agree more with you -- will be buying it from a bike shop rather than purchasing it online.

Hope you have a great week.

Cheers,
Abhay Shah

On Mon, Sep 8, 2025, 11:32 AM Heath Maddox <hmaddox@bart.gov> wrote:

Hi Abhay,

I'm happy to learn that the info I provided was of assistance.

Best of luck with your e-bike purchase. There are a lot of e-bikes out there these days, and the prices can be eye-popping, but I'd recommend resisting the temptation to get the least expensive online deal you can find. Paying a little more to get an e-bike from a reputable manufacturer will be a much better investment. And getting it from a bike shop near you, if possible, is a good idea since maintaining e-bikes can be somewhat more complex than standard bikes, and you will nearly always get superior service from a shop that you bought a bike from.

It sounds like you are an Alameda County resident, so you may be interested in Ava Community Energy's E-bike Incentive Program, which just got underway this summer. Info can be found [here](#). And their list of program-eligible e-bikes, which I think should be pre-vetted to include affordable yet quality options, can be found [here](#).

Heath Maddox

Manager of Bicycle Access Programs

Bay Area Rapid Transit District

2150 Webster Street, 8th Floor

Oakland, CA 94612

415.728.1352



CUSTOMER ACCESS & ACCESSIBILITY
DEPARTMENT

From: Abhay Shah [REDACTED]
Sent: Friday, September 5, 2025 6:49 PM
To: Heath Maddox <hmaddox@bart.gov>
Subject: Re: Case 00367694: E-bike policy [ref:!00Dd00hrYV.!500VI0gUKvZ:ref]

Hi Heath,

Thank you so much for your detailed email -- I very much appreciate it. I am so glad to have received it before placing an order.

We have now decided to purchase a regular ebike now.

Hope you had a wonderful weekend.

Kind regards,

Abhay Shah

On Fri, Sep 5, 2025, 4:13 PM Heath Maddox <hmaddox@bart.gov> wrote:

Dear Abhay,

Thanks for riding BART and for inquiring about e-bike restrictions.

BART has not yet developed any specific rules with regard to electric trikes, but from what I can tell, in very practical terms, the trike you shared a link for is too big to be safely brought in BART stations, on platforms and in BART trains.

With regard to vertical circulation, which cannot be avoided when using BART, there's no way for one person to lift or roll it downstairs, it cannot be brought on an escalator, and it would be at the very least extremely awkward to bring in an elevator, likely impossible on many of BART's smaller elevators. If you were able to somehow get it to the platform, given its weight and dimensions, boarding and un-boarding trains with such a trike would be difficult to accomplish without blocking access for other customers, especially during peak commute times (keep in mind that BART's bike rules prohibit even standard bikes from being brought onboard crowded trains at any time).

Although there may be currently no specific rule against electric trikes, I would strongly counsel against purchasing such a trike with the intent of bringing it on BART.

Sincerely,

Heath Maddox
Manager of Bicycle Access Programs
Bay Area Rapid Transit District
2150 Webster Street, 8th Floor
Oakland, CA 94612
415.728.1352

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

From: Webcustomerservices <webcustomerservices@bart.gov>

Sent: Friday, September 5, 2025 3:41 PM

To: Heath Maddox <hmaddox@bart.gov>

Subject: RE: Case 00367694: E-bike policy [ref:!00Dd00hrYV.!500VI0gUKvZ:ref]

Hello Heath,

Please see customer email below

Regards,

Nathan N.
BART Customer Services

=====
Contact Name Abhay Shah

Contact Email [REDACTED]

Contact Phone [REDACTED]

Opened Date/Time 9/3/2025 7:21 AM

Description Dear ma'am/sir,

First of all thank you so muc for having this mode of transportation - I am a frequent user of BART.

My company has increased its RLretuen-to-office policy to 4 days a week and I am thinking of purchasing an e-bike (an electric tricycle that looks like this one here -- <https://www.addmotor.com/products/grandtan>) to help me commute from home to the Union City BART station.

I am wondering if electric tricycles will be allowed in BART trains?

Look forward to hearing from you.

Kind regards,
Abhay
ref:!00Dd00hrYV.!500VI0gUKvZ:ref

From: [Heath Maddox](#)
To: [REDACTED]
Cc: [Webcustomerservices](#)
Subject: RE: Case 00367775: First car bike restrictions [ref:!00Dd00hrYV.!500VI0gZPoC:ref]
Date: Friday, September 5, 2025 4:24:00 PM

Dear Mike,

Thanks for your inquiry regarding motorized and non-motorized scooters on the first car.

BART has not yet developed specific rules for scooters, but it is something we are considering.

The primary reason that bikes are not allowed on the first car is so that, in the event of an emergency, the train operator can have a quick, unimpeded path through the first car to emergency controls and to provide assistance.

In my mind, scooters, unless they are folded, have a similar potential for obstructing or impeding a train operator as a bicycle. If and when we do develop specific rules for scooters, as the staff person who manages bicycle and micromobility access for BART, my recommendation will be to make them subject to same rules as bikes: folded scooters, like folded bikes, may be brought on any car, while unfolded scooters and bikes need to stay off the first car. Until that time, it's basically up to the discretion of the train operator.

Sincerely,

Heath Maddox
Manager of Bicycle Access Programs
Bay Area Rapid Transit District
2150 Webster Street, 8th Floor
Oakland, CA 94612
415.728.1352

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

From: Webcustomerservices <webcustomerservices@bart.gov>
Sent: Friday, September 5, 2025 3:49 PM
To: Heath Maddox <hmaddox@bart.gov>
Subject: RE: Case 00367775: First car bike restrictions [ref:!00Dd00hrYV.!500VI0gZPoC:ref]

Hello Heath,

Please see below

Regards,

BART Customer Services

=====
Contact Name Mike fahy

Contact Email [REDACTED]

Opened Date/Time 9/4/2025 4:54 AM

Description Curious why bicycle ridres are asked to move off the first car but motorized and non motorized scooters are not subject to the same restriction enforcement?
ref:!00Dd00hrYV.!500VI0gZPoC:ref



▶ State Legislative Update
BART Board of Directors – August 14, 2025



Senate Bill 63 and
Related Legislative Matters
(For Information)

Revenue Measure Framework

Revenue Mechanism: Sales Tax

Geography: Five Counties (Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara)

Rates: One-half (1/2) cent in Alameda, Contra Costa, San Mateo, and Santa Clara and one (1) cent in San Francisco

Duration: 14 Years (Q4 of FY 2027 - FY 2040)

San Mateo County Opt-in Decision

- On August 6, the San Mateo County Transit District (SamTrans) Board voted (8-1) for San Mateo County to opt into the regional measure at a one-half (½) cent tax rate.
- SamTrans will continue discussions with the Bay Area State Legislative Delegation to address:
 - The county's proposed alternative expenditure plan
 - Oversight representation and accountability measures over county contributions
 - The county's contingent participation based on future bill amendments

Santa Clara County Opt-in Decision

- On August 7, the Santa Clara Valley Transportation Authority (VTA) Board voted (12-0) for Santa Clara County to opt into the regional measure at a one-half (½) cent tax rate.
- VTA will continue discussions with the Bay Area State Legislative Delegation to address:
 - The use of funds generated in Santa Clara County and return-to-source allocations
 - Membership of new governing or oversight bodies established by SB 63
 - Regional Cap-and-Trade funding priorities
 - The county's contingent participation based on future bill amendments

Operator Funding Targets

Operator Recipients	% of Measure	FY 2031\$
BART	31%	\$330M
Muni	16%	\$170M
Caltrain	7%	\$75M
AC Transit	5%	\$51M
Contra Costa County Small Bus Operators (County Connection, Tri Delta, WestCAT)	1.5%	\$15.75M
San Francisco Bay Ferry	0.7%	\$7M
Alameda County Small Bus Operators (LAVTA and Union City Transit)	0.5%	\$5.25M
Golden Gate Transit	0.1%	\$1M

Note: Allocations for small bus operators will be determined by county transportation entity on an annual basis

County Return-to-Source Funding

County Transportation Entities	% of Measure	FY 2031\$
Santa Clara Valley Transportation Authority	25.1%	\$264M
San Mateo County Transit District	4.7%	\$50M
Contra Costa Transportation Authority	2.5%	\$27M
Alameda County Transportation Commission	1.0%	\$10M
San Francisco County Transportation Authority	0%	\$0M

County funds must be used for public transportation expenses and cannot be withheld by the Transportation Revenue Measure District (TRMD) or the Metropolitan Transportation Commission (MTC).

Other Funding Categories

Transportation Revenue Measure District (TRMD): \$2.32M

- Annual allocation for administration by TRMD is 0.22% of total measure (0.25% of each county's ½-cent sales tax revenue generation).
- In addition to annual administrative allocation, one-time costs, taken off the top of the measure, for financial efficiency review and ballot-related expenses.

Rider-Focused Transit Improvements: \$46.40M

- Annual allocation to MTC is 4.4% of total measure (5% of each county's ½-cent revenue generation).
- **Fare programs (\$25.78M):** Funds to MTC for Clipper START discount program and free/discounted transfers.
- **Accessibility (\$10.31M):** Investments in streamlined paratransit eligibility and cross-jurisdictional paratransit.
- **Transit Priority and Navigation (\$10.31M):** Mapping and wayfinding upgrades at intermodal hubs and strategic transit priority investments.

Authors' Accountability Committee Proposal

- Applies to four operators receiving over \$50M for public transit operations expenses: BART, AC Transit, Caltrain, and Muni.
- Creates an Accountability Committee under MTC:
 - Composed of two commissioners from each participating county.
 - Ensures transit operators report regularly on performance metrics and apply their adopted policies, standards, or commitments consistently and fairly.
 - Provides participating counties a venue to raise concerns and seek redress while upholding regionwide standards of accountability and fairness.
 - May recommend up to 5% of measure funds be withheld from a subject operator if it is determined there is a breach of standards.
 - Committee recommendations to withhold funds shall be approved by the full MTC unless rejected by 2/3 supermajority of voting members.

Authors' Financial Efficiency Review Proposal

- Applies to same four operators receiving over \$50M from the regional measure.
- MTC shall contract with a third party to conduct a two-part efficiency review consisting of:
 - An early action phase, before the November 2026 election, to identify ways to increase or improve service using existing resources.
 - A more comprehensive phase, if the measure passes, to identify cost-saving measures and efficiencies that would reduce one-time and ongoing fixed and variable transit operator costs.
- An Oversight Committee is created by MTC:
 - Composed of a representative from MTC, a representative from each transit operator, and four public transit experts appointed by the State.
 - Operators shall submit draft implementation plans for efficiency and cost-savings to Oversight Committee for review, approval, or recommended revisions, with final operator board approval.
 - MTC shall review the implementation work of operators prior to an annual allocation of regional measure funds.

BART Financial Outlook

Five-Year Projection	FY26	FY27	FY28	FY29	FY30	FY31
Regular Sources	837	843	875	903	935	966
Regular Uses	1,152	1,218	1,251	1,266	1,292	1,312
SB 125 Emergency Assistance	315	0	0	0	0	0
Net Result	0	-376	-376	-363	-357	-346
SB 63 Sales Tax Proceeds (SB 63 Expenditure Plan Target)	0	77	312	317	323	330
Net Result with SB 63	0	-299	-64	-46	-34	-16

- SB 63 allocation to BART based on a % of revenue collected – could be higher or lower than forecast
- SB 63 authorizes one quarter of revenue collection in FY27; \$299M deficit forecast remains in that year
- ~\$64M deficit forecast in FY28 – more budget solutions needed
- Deficit projections after FY27 depend on rates of cost growth, ridership recovery, CPI-based fare increase policy, and sales tax

State Transit Loan

- AB 102, as part of the Budget Act of 2025, conditionally loans BART, AC Transit, Caltrain, and Muni a total of \$750 million from the General Fund for operating expenditures to maintain transit services.
- Only operative if future legislation is enacted during the 2025 session authorizing the passage of a Bay Area regional measure to support agencies' long-term financial stability and their ability to repay state loan.
- BART targeting up to \$300 million disbursement to bridge operating gap until regional measure funds start flowing in Quarter 4 of FY 2027.
- Desire for Legislature and Administration to finalize loan terms this legislative session.
- Current focus on negotiating favorable loan terms for the four agencies that includes repayment commitment to the state.

Legislative Look Ahead

- Legislature reconvenes from Summer Recess on August 18.
- Bill referred to the Assembly Appropriations Committee. Potential hearing dates of August 20 or 27.
- Bill likely to go to Suspense File. Suspense File hearing on August 29.
- Second hearing in Assembly Transportation Committee week of September 1.
- Last day to amend the bill on the floor is September 5.
- The bill must pass both the Assembly as well as the Senate on concurrence by September 12.
- Governor Newsom must act on the bill by October 12.



Senate Bill (SB) 63 and State Legislative Matters BART Board of Directors – September 11, 2025



Today's Agenda

- Recent Advocacy on Senate Bill (SB) 63 and State Transit Loan
- Amendments to SB 63
- Update on State Transit Loan
- Legislative Look Ahead

Recent Advocacy on SB 63 and State Transit Loan

Director and General Manager Advocacy

- Aug 25: Meeting with Assemblymember Rebecca Bauer-Kahan (Vice President Hernandez, Director Rinn)
- Aug 26: Meeting with Assembly Transportation Committee Chair Lori Wilson (President Foley, GM, Deputy GM)
- Aug 27: Meeting with Senator Jerry McNerney (Vice President Hernandez, Deputy GM)
- Aug 27: Meeting with Senator Aisha Wahab (Directors Raburn and Ames, Deputy GM)

Staff and Advocate Advocacy

- Outreach to Governor Newsom's Deputy Legislative Affairs Secretary and Deputy Cabinet Secretary and on Transportation, Housing & Homelessness
- Calls with Policy Advisor for Speaker Robert Rivas
- Joint operator meetings with Senate and Assembly Budget Committee staff on state transit loan
- Meetings with staff for:
 - Senators Wiener, Arreguín, and Becker
 - Assemblymembers Bonta, Papan, Wicks, Haney, Lee, Ahrens, and Ávila Farías
 - Assembly Transportation Committee
- Public comment at the Assembly Transportation Committee hearing on September 8

Amendments to SB 63

Public Transit Revenue Measure District Taxing Authority

- Transportation Revenue Measure District renamed to Public Transit Revenue Measure District (PTRMD)
- PTRMD jurisdiction revised to include San Mateo and Santa Clara Counties
- Specifies 14-year duration for proposed sales tax

Revenue Measure Expenditures

- The PTRMD shall pay for one-time administrative costs, election costs, costs incurred for the financial efficiency review, any required legal defense, etc.
- Revenue allocations to eligible entities and programs now specified and expressed as percentages of each county's revenue generation.
- BART shall receive the following percentages of revenue generated in each county:
 - 64.70% of revenues generated in Alameda County
 - 58.59% of revenues generated in Contra Costa County
 - 29.14% of revenues generated in the City and County of San Francisco
 - 26.64% of revenues generated in San Mateo County

Amendments to SB 63 (cont.)

Financial Transparency and Review

- The Metropolitan Transportation Commission (MTC) shall hire a third-party consultant to conduct a two-part efficiency review of BART, AC Transit, Caltrain, and Muni.
- An oversight committee is established with a representative from MTC, four operator representatives, four public transit experts, a representative each from the California State Transportation Agency (CalSTA) and the Department of Finance (DOF) as ex officio, nonvoting members.
- Phase 1 review (prior to election): Focus on early action strategies to improve service and enhance the customer experience; analysis of operators' real property assets, existing holdings, and potential redevelopment opportunities.
- Phase 2 review (if measure passes): Focus on cost-saving measures to reduce operators' one-time and ongoing fixed and variable costs; regional assessment of development and financing strategies to maximize operators' real property assets.
- Operators shall submit draft implementation plans for efficiency and cost-savings to the oversight committee for review, approval, or recommended revisions.
- MTC shall review implementation work and is authorized to withhold funding for noncompliance.

Amendments to SB 63 (cont.)

Enhanced Accountability

- MTC shall establish ad hoc adjudication committees for BART, AC Transit, Caltrain, and Muni, consisting of two commissioners each from the counties contributing revenue to that operator.
- A participating county transportation entity or Board of Supervisors may submit a petition once a year to a committee if they believe there are operator deficiencies or inconsistencies within their county.
- Before submitting a petition, the petitioner must first work with the subject operator to address the issue.
- If it is determined there is a breach of standards, a committee may recommend that up to 3.5% of allocated funds be withheld from the subject operator.
- If after 90 days there is still no corrective action, a committee may recommend that up to an additional 3.5% of funding be withheld.
- Funding is withheld until a committee votes to release it, following a specified process.
- If MTC is still in possession of withheld funds at the end of the measure, they shall reallocate funds to support public transit expenses within the counties that the operator serves.

Urgency Clause

- Previous urgency clause removed. Majority vote now required for passage in both houses.

Update on State Transit Loan

- On September 6, Senators Wiener and Arreguín announced that the California Department of Finance (DOF) would not finalize terms of state loan to transit before the legislative session ends this Friday.
- On September 8, the Governor's office released a statement that outlined a goal of agreeing to terms by this fall.
- On September 8, SB 105, a Budget Bill Junior, was amended. Bill directs the DOF to work with CalSTA to examine loan or other financing options, with a goal to complete this work by January 10, 2026, for inclusion in the Governor's proposed Fiscal Year 2027 budget, which may be acted upon by the Legislature in early 2026.
- SB 105 specifies a loan must be fully repaid according to a defined schedule via a guaranteed repayment mechanism backed by a reliable and predictable revenue source.

Legislative Look Ahead

- SB 63 eligible for Assembly floor vote on Thursday, September 11.
- The Senate Transportation Committee may wish to hear SB 63 off the floor before a Senate floor vote.
- Budget trailer bills eligible for floor votes pending Budget Committee action in both houses.
- All bills must pass the Legislature by September 12.
- Budget trailer bills take effect immediately upon signature by the Governor.
- Governor Newsom must act on bills by October 12.
- SB 63 will take effect on January 1, 2026, if signed by the Governor.

MTC Summary of Senate Bill 63: Public Transit Revenue Measure

September 12, 2025

SB 63 authorizes placement of a 14-year regional transportation sales tax on the November 2026 ballot in Alameda, Contra Costa, San Francisco, San Mateo and Santa Clara counties. The measure would generate approximately \$1 billion annually to sustain and improve public transit. It could be placed on the ballot either through action by a newly formed Public Transit Revenue Measure District (governed by the MTC board) or via a citizen's initiative.

Summary of the Public Transit Revenue Measure Authorized by SB 63

Geography	The five counties of Alameda, Contra Costa, San Francisco, San Mateo and Santa Clara
Ballot	November 2026
Revenue Mechanism	Sales tax
Tax Rate	½ cent in Alameda, Contra Costa, San Mateo and Santa Clara; 1 cent in San Francisco
Duration	14 years
Expenditures	Detailed expenditure plan prescribed in statute (see below). Funds are directed to transit agencies and county transportation entities serving the geography of the district as well as to MTC to invest in transit rider-focused improvements.
Funding Eligibility	Public transit operations, transit capital, rider-focused investments to make transit more affordable, accessible, faster and easier to use, and repaving of roads serving fixed route public transit.
Accountability	Independent oversight committee, financial efficiency study, maintenance of effort requirement (prohibiting supplanting of existing transit operations funding) and county-led adjudication of transit agency performance concerns ensure taxpayer accountability.

Expenditure Plan

The bill includes a detailed expenditure plan that prescribes the share of annual funding to be provided to transit agencies providing service in the five counties, county transportation agencies, and to MTC for rider-focused transit improvements (fare affordability programs, including Clipper® START and free and reduced-cost transfers, accessibility improvements, mapping and wayfinding and transit priority projects and programs).

SB 63 defines how much funding each recipient will receive based on a percentage of revenue generated by each county in the Public Transit Revenue Measure District. This reflects the bottom-up nature of how the expenditure plan was developed, with careful consideration of local perspectives regarding how much funding each county should contribute to specific transit agencies.

Some recipients receive funds directly via a transfer of funds from the District with no authority for the funds to be conditioned based on performance factors (Alameda County Transportation Commission, Contra Costa Transportation Authority, SamTrans and Santa Clara Valley Transportation Authority). For all others, the funds are transferred to MTC for allocation to the

recipients consistent with the expenditure plan. MTC is required to ensure compliance with certain accountability provisions, which are described in the “accountability” section below. On matters of transit agency performance, determinations regarding any corrective actions or withholding of funds are made by a subset of Commissioners representing counties that contribute new tax revenues to that transit agency. Attachment A depicts the funding flow.

**Public Transportation Revenue Measure Expenditure Plan
(Funding Estimate by Recipient)**

Fund Recipient/Purpose	Fiscal Year 2031 Estimate* (\$ in millions)
BART operations	\$330
Santa Clara Valley Transportation Authority (VTA) transit capital, operating and repaving streets with bus routes**	\$264
San Francisco Municipal Transportation Agency operations	\$170
Caltrain operations	\$75
AC Transit operations	\$51
SamTrans transit capital, operating and repaving streets with bus routes**	\$50
Small transit agency operations [SF Bay Ferry, County Connection, WestCat, TriDelta Transit, Livermore Amador Valley Transit Authority (LAVTA), Union City Transit]	\$29
Contra Costa Transportation Authority (CCTA) transit capital, operating and repaving streets with bus routes**	\$26.5
Alameda County Transportation Commission (ACTC) transit capital, operating and repaving streets with bus routes**	\$10.3
Transit rider-focused improvement programs through MTC**	\$46.4
Public Transit Revenue Measure District Administration**	\$2.3
Total	\$1,054.5

*Based on fiscal year 2031 estimates of the percentage shares provided for in the legislation, as provided by authors. Estimates are based on technical assistance provided by county transportation agencies to bill authors.

** These recipients receive funds directly from the District.

What does SB 63 mean for Bay Area Residents?

Economic and Mobility Benefits

Bay Area transit riders take more than 1 million trips each day, with over 80 percent of those trips on just four systems: BART, SF Muni, Caltrain and AC Transit. Riders include tens of thousands of K-10 students, seniors and individuals with disabilities, and low-income residents who can't afford to own a car. The Bay Area's \$1.2 trillion economy depends on a well-

functioning transit system. Even a small shift of transit riders to solo driving would overwhelm the region's roadways – research shows that just 3 to 5 percent fewer vehicles on the road can cut traffic delays by 50 to 70 percent. Bay Area transit supports good paying jobs. Thousands of workers are directly employed by transit systems proposed to be funded through the measure and planned transit modernization and expansion projects can create tens of thousands more jobs, but those projects only make sense if the core system is operational. SB 63 will allow voters to decide if they want to prevent devastating cuts to transit service and instead invest in a stronger, more reliable system.

Sustaining and Enhancing Transit, Including Road Repairs on Routes that Serve Transit

Approximately 60 percent of the measure is dedicated to BART, Muni, Caltrain, AC Transit, San Francisco Bay Ferry and other small transit agencies providing service in the district to keep buses, trains and ferries moving. About one-third is guaranteed to Santa Clara VTA, SamTrans, Alameda County Transportation Commission, and Contra Costa Transportation Authority, with flexibility to use funds for transit capital, operations, or pavement projects on roads with regular bus service.

Transit Rider-Focused Improvements

A little less than 5 percent of the funds will be dedicated to improving transit affordability, accessibility, and ease of use – priorities identified in the 2021 Bay Area Transit Transformation Action Plan. These initiatives are already underway on a pilot basis through the Bay Area's Regional Network Management framework, a collaboration between MTC and transit agencies. Funding from this measure will accelerate their deployment and long-term expansion for even greater benefits.

The suite of rider-focused improvements includes:

- Free and reduced transfers that could save multi-agency riders up to \$1,500 per year. On a regional basis, this is estimated to increase ridership by approximately 30,000 trips per day.
- Expansion of the Clipper® START program, which provides a 50 percent means-based fare discount, to extend this savings to an estimated 100,000 additional low-income adults.
- Transit access improvements for seniors and individuals with disabilities
- Transit-priority projects to make bus trips faster and more reliable and mapping and wayfinding improvements to make transit easier to use.

Finally, the bill includes a strict 0.22 percent cap on administration, maximizing the share of revenue used for improving and sustaining transit service.

SB 63 Accountability Provisions

The bill includes provisions aimed at ensuring accountability to taxpayers, transit riders, and local government partners through:

1. **Independent Oversight Committee:** The bill requires the district to establish an independent oversight committee to ensure expenditures are consistent with the statute. Membership will include at least one representative of each county comprising the district, appointed by each county's board of supervisors.
2. **Financial efficiency requirements:** BART, Muni, Caltrain, and AC Transit must undergo a two-phase independent third-party financial efficiency review overseen by an

Oversight Committee composed of four independent experts, four transit agency representatives, and a Commissioner from within the district's geographic boundaries. MTC is responsible for procuring the third-party consultant to conduct the review, staffing the Oversight Committee. Each transit agency identifies the efficiency measures it will implement, with a new Oversight Committee responsible for reviewing and approving those commitments. Funds are conditioned upon the Commission determining a transit agency's ongoing compliance with the implementation actions.

3. **Maintenance of effort:** BART, Muni, Caltrain, AC Transit, Golden Gate Transit, SF Bay Ferry and Alameda County and Contra Costa County small bus operators must maintain existing levels of operations funding so the measure augments, rather than replaces, current resources dedicated to transit operations. The Commission must verify compliance before allocating funds. This provision allows for exceptions under specified circumstances, such as allowing the use of funds previously used for operations for state of good repair, subject to Commission approval.
4. **Enhanced Transit Agency Accountability via Ad Hoc Adjudication Committees:** Empowers counties in the geography of the district to ensure their taxpayers are treated fairly by BART, Muni, Caltrain and AC Transit. A county transportation agency or board of supervisors may petition to establish an ad-hoc adjudication committee if a transit agency is not applying standards, policies and commitments related to key operational and maintenance issues (such as service levels, fare policy, cleanliness, maintenance, access, and safety) consistently across counties or if such standards, policies or commitments disproportionately disadvantage service or state of good repair in a county without compelling justification. The committee is composed solely of representatives from counties contributing revenue measure funds to the transit agency under review. Its determinations are binding and may result in withholding up to 7 percent of the transit agency's funds. The process includes an initial 3.5 percent withholding with a 90-day period for corrective action; if the issue is not resolved, an additional 3.5 percent may be withheld.

Heath Maddox

From: Val Menotti
Sent: Monday, September 15, 2025 11:25 AM
Subject: BART statement on passage of transit funding measure SB 63
Attachments: Handout_SB 63 Overview_9.12.25_v4.pdf

All,

Over the weekend, the California legislature approved SB63, which authorizes MTC (or by a voter initiative) to go to the voters in November 2026 with a proposed 5-county Bay Area regional public transit funding measure to be funded by a sales tax increase. This was very big step for transit, and the bill now sits with the Governor. The Governor has until October 12 to consider the bill.

This measure would generate funds for public transit in Alameda, Contra Costa, San Francisco, San Mateo and Santa Clara. As proposed, the 14-year measure would generate an estimated \$330 M annually (by 3031) for BART transit operations, which would go a long way towards closing BART's operating funding gap.

For those interested, MTC has provided a 3-page summary of the bill (attached).

Regards,

Val Joseph Menotti
Assistant General Manager, Planning & Development
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Oakland, CA 94612
VMenott@bart.gov
510.287.4794

From: BART Communications <Communications@info.bart.gov>
Sent: Saturday, September 13, 2025 8:07 AM
To: Val Menotti <vmenott@bart.gov>
Subject: BART statement on passage of transit funding measure SB 63



Date: September 13, 2025

Contact:
Alicia Trost

BART statement on passage of transit funding measure SB 63

Senate Bill (SB) 63 is a historic opportunity to allow voters in five counties of the Bay Area to consider a 14-year sales tax measure in November 2026 to preserve and improve transit. BART, and the entire transit network that keeps the Bay Area moving, stand to benefit from this bill.

The legislation is needed because remote work has caused a decline in operating revenue for various operators and deficits are too large to solve through cuts alone. Since the COVID-19 pandemic, it has been clear that BART's outdated funding model no longer works. BART is facing annual operating deficits of \$350-400 million once the emergency assistance we have been provided runs out at the end of Fiscal Year 2026.

The BART Board of Directors supports SB 63 because it will cover a significant portion of BART's operating deficit and allow us to maintain current service levels and improve the rider experience. BART will continue to identify additional cost savings and efficiencies to address our deficit, and we welcome the enhanced accountability measures and financial efficiency review included in SB 63.

BART is grateful to Senators Scott Wiener and Jesse Arreguín for championing this legislation and their fierce advocacy for transit funding.



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