



BART System Development Policy Update

September 22, 2022



Meeting Overview

- Where we are:

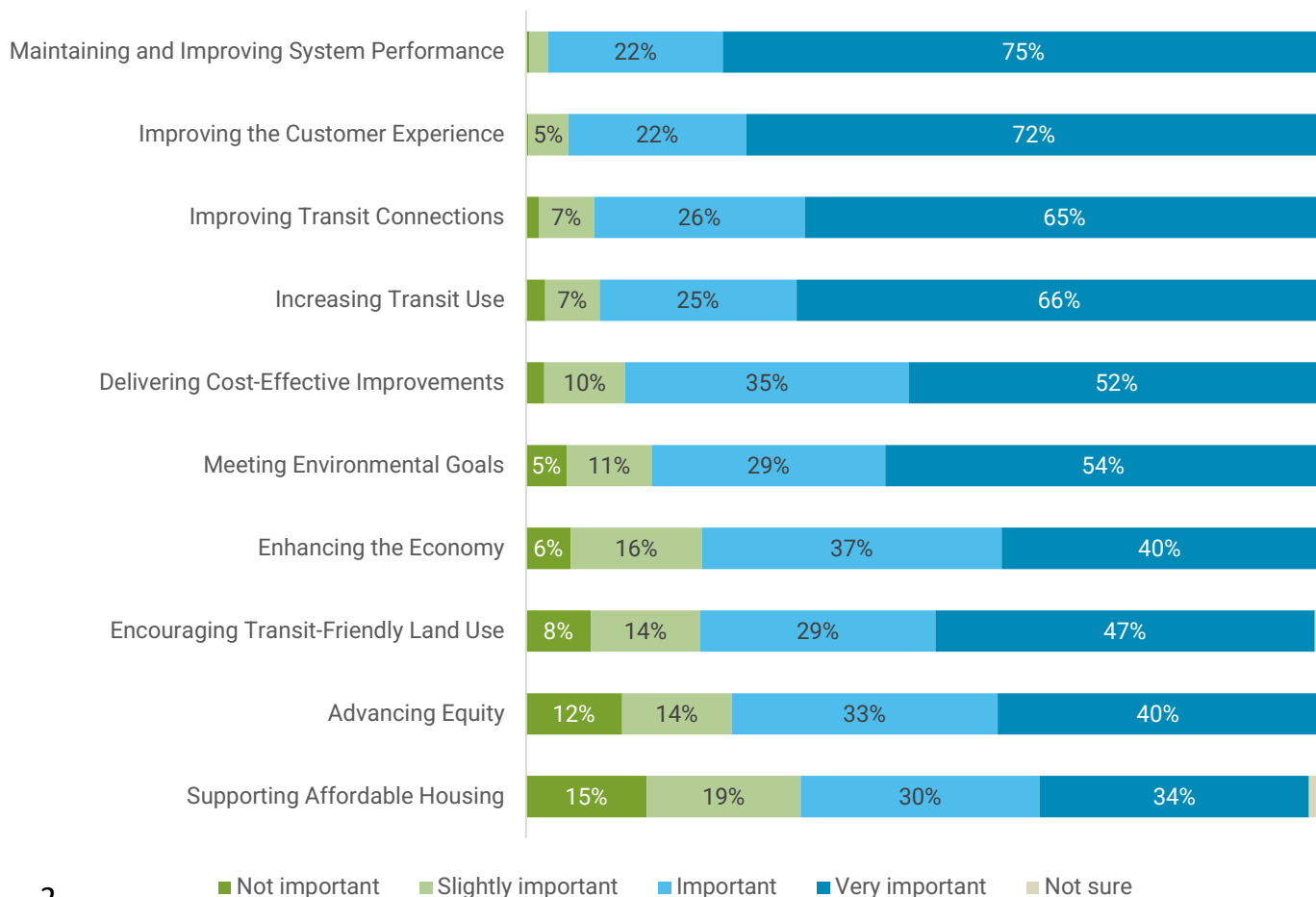
- Board introduction: November 2021
- Outreach to public and staff at the Metropolitan Transportation Commission (MTC) and County Transportation Authorities
- Draft Policy update to BART Board September 22, 2022 (Info)

- Next steps

- Seek BART Board Policy adoption in Fall 2022

System Development Policy Online Survey

How important is each of the following goals to you, in considering how the BART system may expand?



- Participants were asked the importance of the 10 updated goals for the revised System Expansion Policy
- While all BART's drafted policy goals were "important" or "very important" to 64% or more of participants, **improving system performance, customer experience, and transit connectedness, and increasing transit use** emerged as top priorities
- When asked "what's missing?" participants took the opportunity to note specific extensions, and to underline their desire for **safety, reliability, and cleanliness**
- Survey participants (1,162 respondents):
 - Tended to be older, White, and have higher incomes
 - Mostly resided in Alameda or Contra Costa County
 - Anticipating riding BART in the future, but have other mobility options

Top-Level Considerations

1. Rename Policy: System Expansion → System Development
 - New lines and stations, including infill stations
2. Update goals & strategies
 - Better reflect recent policies
 - Add explicit reference to equity, environmental sustainability, system performance, and rider experience
 - Acknowledge challenges to financial outlook and the importance of fiscal stability
 - Re-emphasize partnerships
3. Modify implementation process with business case framework
4. Puts infill station consideration on equal footing with extensions

Proposed Policy Framework

1. Purpose

2. Goals and Objectives

- a) Support regional livability and a sustainable, equitable, and prosperous Bay Area
- b) Better serve communities and improve the rider experience
- c) Support stewardship of the BART District & taxpayer Investment

3. Implementation

- Strategies
- Project Evaluation Process

Proposed Goals and Objectives

Goal: Support regional livability and a sustainable, equitable, and prosperous Bay Area.

| Existing Policy Goals | Proposed Policy Objectives | Rationale |
|--|---|---|
| <ul style="list-style-type: none">Enhance Regional mobility, especially access to jobs. | <ul style="list-style-type: none">Increase ridership and transit mode share via greater accessibility, connectivity, and service that complements changing travel patterns and serves transit dependent riders. | <ul style="list-style-type: none">Broaden mobility statement to address ridership, mode share & transit dependent riders |
| <ul style="list-style-type: none">Demonstrate a commitment to transit-supporting growth and development. | <ul style="list-style-type: none">Ensure transit-oriented communities bolster BART extensions and infill stations, help address the housing crisis, and improve the region's jobs/housing balance. | <ul style="list-style-type: none">Strengthen language related to transit supportive uses consistent with Transit-Oriented Development PolicyReference transit-oriented communities, existing or plannedExplicitly refer to infill |
| <ul style="list-style-type: none">New | <ul style="list-style-type: none">Advance BART, state, and regional environmental goals by improving transit access to regional destinations, reducing vehicle miles traveled, and ensuring climate resiliency. | <ul style="list-style-type: none">Explicitly address environmental goals, consistent with Strategic Plan and Sustainability Policy |

Proposed Goals and Objectives

Goal: Better serve communities and improve the rider experience.

| Existing Policy Goals | Proposed Policy Objectives | Rationale |
|--|---|--|
| <ul style="list-style-type: none"> Develop projects in partnership with communities that will be served. Assure that all projects address the needs of the District's residents. | <ul style="list-style-type: none"> Ensure equity by prioritizing the needs of transit-dependent riders, with special emphasis placed on communities who are or who have been systemically disenfranchised, traditionally marginalized, and harmed by past infrastructure projects. | <ul style="list-style-type: none"> Explicitly bring equity into the policy goals, consistent with Strategic Plan Community partnership moved to strategies (below) |
| <ul style="list-style-type: none"> Enhance multi-modal access to the BART system. | <ul style="list-style-type: none"> Improve multimodal connectivity with a focus on improved transit connectivity and active access modes. | <ul style="list-style-type: none"> Add detail in-line with the Station Access Policy Call out transit connectivity per public feedback |
| <ul style="list-style-type: none"> New | <ul style="list-style-type: none"> Improve rider experience by enhancing service reliability and connectivity, reducing crowding, and providing a safe and healthy environment. | <ul style="list-style-type: none"> Per public feedback ensure that rider experience is well addressed |

Proposed Goals and Objectives

Goal: Support stewardship of the BART District & taxpayer investment.

| Existing Policy Goals | Proposed Policy Objectives | Rationale |
|---|--|---|
| <ul style="list-style-type: none">• Generate new ridership on a cost-effective basis. | <ul style="list-style-type: none">• Ensure the District's long-term financial sustainability by considering the benefits of system development through a comprehensive cost assessment that considers operational and maintenance cost and complexity, as well as core system operational and capital impacts. | <ul style="list-style-type: none">• Reframe goal to financial sustainability more broadly and address cost-effectiveness under strategies |
| <ul style="list-style-type: none">• Implement and operate technology-appropriate service. | <ul style="list-style-type: none">• Deliver cost-effective improvements that meet riders' needs, employing technology and mode appropriate transit service, and leveraging other capital investments in transportation. | <ul style="list-style-type: none">• Broaden/clarify goal statement |
| <ul style="list-style-type: none">• Moved from strategies/criteria. | <ul style="list-style-type: none">• Improve system performance and resiliency without detracting from existing service or overburdening existing assets, providing systemwide benefits where feasible. | <ul style="list-style-type: none">• Explicitly include system performance per public feedback |

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Proposed Implementation Strategies

| Existing Strategies | Updated Strategies | Rationale |
|--|--|---|
| <ul style="list-style-type: none">• <u>Partnership</u>: Seek partnerships with other transit agencies, local communities and private entities to plan and implement service expansion. | <ul style="list-style-type: none">• <u>Partnership with local jurisdictions</u>: Partner with jurisdictions to achieve policy goals by ensuring transit-supportive land use policies, zoning and practices, anti-displacement policies and practices, climate adaptation planning, safe multimodal access to stations, and funding support.• <u>Community involvement</u>: Ensure that a unified process for co-creation and community engagement is central to the development of any system expansion and that this process begins at this early stage of the planning process, is inclusive of priority populations and emphasizes equitable outcomes. Engagement with local communities and businesses must recognize that historically disenfranchised communities have been underserved and negatively impacted by transit. | <ul style="list-style-type: none">• Elaborate on the importance of partnerships by outlining in greater detail the roles of local jurisdictions and community involvement |

Proposed Implementation Strategies

| Existing Strategies | Updated Strategies | Rationale |
|--|--|---|
| <ul style="list-style-type: none">• <u>Transit Service Options:</u> Explore new BART and other transit service options (i.e., commuter rail, light rail, quality bus) where appropriate and possibly as interim service. | <ul style="list-style-type: none">• <u>Innovation and efficiency:</u> Projects should seek to reduce delivery time and cost via innovative approaches and should incorporate lessons learned from previous major projects. | <ul style="list-style-type: none">• Reframe in terms of innovation and efficiency• Service options addressed in goals & to be evaluated in business case |

Proposed Implementation Strategies

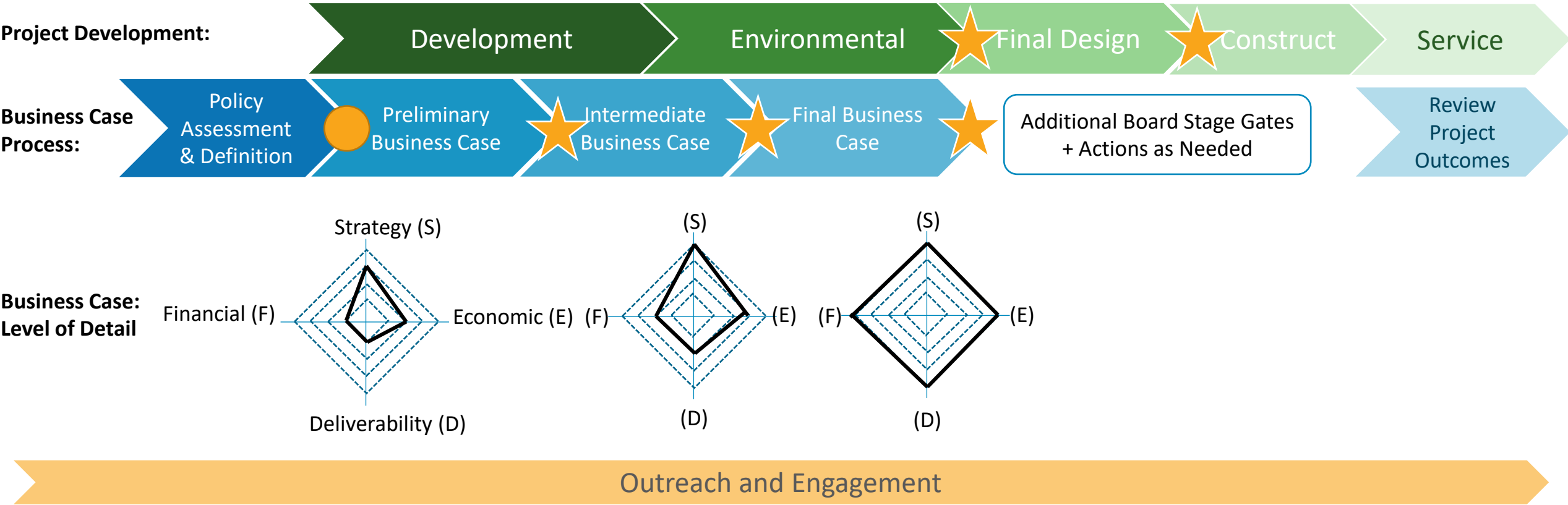
| Existing Strategies | Updated Strategies | Rationale |
|--|--|--|
| <p><u>Criteria for Project Advancement:</u> For all new expansion projects (new extensions, new in-fill stations) develop criteria that will assure that projects are:</p> <ul style="list-style-type: none"> • Cost effective, i.e., minimize the need for operation subsidies • Integrated with other services and facilities in an intermodal regional network • Maximize ridership by supporting smart, efficient and desirable growth patterns • Can be accommodated without adversely affecting existing system capacity, quality and financial health • Have adequate bus, bicycle, and pedestrian feeder service. | <ul style="list-style-type: none"> • <u>Funding:</u> Projects will be consistent with applicable local, state, and federal funding programs' requirements to maximize the ability to receive funding. All projects must develop a funding plan as a part of the business case process. • <u>Iterative and comprehensive benefits evaluation:</u> Project sponsors of new extensions and/or infill stations will coordinate with BART staff to develop a business case that evaluates cost-benefit and demonstrates comprehensive, equitable, and transparent measurable project benefits to the region and transit riders. | <ul style="list-style-type: none"> • Focus on funding and comprehensive benefits evaluation • Incorporate funding requirements by reference • Further addressed in Project Evaluation Process |

Proposed Implementation Project Evaluation Process

- Implementation section outlines process:
 - Policy assessment, considering BART, Regional and Federal policy (e.g. BART's Transit-Oriented Development Guidelines, MTC's Transit-Oriented Communities Policy, Federal Capital Investment Grant)
 - Memorandum of Understanding (MOU) with project sponsor, funding partners
 - Business case assessment – iterative and comprehensive
- Administrative document outlining more detailed Business Case Procedures to be developed
- Detailed metrics not included but incorporated by reference in policy consistency assessment

System Development Policy

Proposed Implementation Process



 Memorandum of Understanding

 Board Actions & Stage Gates

Policy Consistency Example: Residential Density

- MTC Res 4530/Transit-Oriented Communities Policy
- BART TOD Guidelines (require 75 units/acre for all place types)

For consistency with both policies, an extension or infill area must achieve 75 unit/acre min; Tier 1 locations would need to be 100 units/acre min

Density for New Residential Development

On average, densities should be at or above the specified ranges. Allows for varying densities throughout station areas to accommodate for small lots, environmental factors, conflicts with Airport Land Use Compatibility Plans, etc.



| Level of Transit Service | Minimum Density | Allowable Max Density |
|--|------------------------------|------------------------------|
| Tier 1: Rail stations serving regional centers* | 100 units/net acre or higher | 150 units/net acre or higher |
| Tier 2: Stop/station served by 2 or more BART lines or BART and Caltrain | 75 units/net acre or higher | 100 units/net acre or higher |
| Tier 3**: Stop/station served by 1 BART line, Caltrain, light rail transit, or bus rapid transit | 50 units/net acre or higher | 75 units/net acre or higher |
| Tier 4: Commuter rail (SMART, ACE, Capitol Corridor) stations, Caltrain stations south of Tamien, or ferry terminal | 25 units/net acre or higher | 35 units/net acre or higher |

*Applies to the following stations: Downtown San Francisco (Embarcadero, Montgomery, Powell, Civic Center); Downtown Oakland (19th, 12th, Lake Merritt); and Downtown San Jose (Diridon)

** Tier 3 cities with a population of 30,000 or less may comply with Tier 4 density requirements.



Next Steps

- Board Adoption Process:

- Info item September 22, 2022
- Policy revisions based on Feedback
- Consider adoption Fall 2022

- Staff Next Steps:

- Develop Business Case Procedures to further define implementation

Discussion

