



BART System Expansion Policy - Update

BART Board of Directors

November 18, 2021



Presentation Overview

–Background

- History & Context of Existing System Expansion Policy
- Need for update

–Kicking Off an Update Process

- Updating Goals, Strategies, and Evaluation Methods
- Separating Policy Principles From Project Implementation

–Next Steps

- Future Board Process

History & Context: Existing Policy Creation & Application

- System Expansion Policy Framework comprised of three elements
 - **Policy Framework** for System Expansion, which lays out broad goals & strategies (adopted 1999)
 - System Expansion **Criteria and Process** (Attachment A – adopted 2002)
 - **Metrics** for Staff Recommendations (Attachment B)
 - https://www.bart.gov/sites/default/files/docs/SYSTEM_EXPANSION.pdf
- Context:
 - Need for consistent method to evaluate and screen extension projects proposed by local jurisdictions and County Transportation Agencies (CTAs)
 - Desire to consider appropriate technologies
 - Process for investing resources beyond original System Design
- Policy Application
 - Policy applied to a limited number of projects, influencing decisions on project advancement, technology alternatives, and local plan development by city partners
 - Board decisions pre-dating policy were not revisited
 - Policy has informed but has not been directly applied to projects led by other agencies

Need for Policy Update: What Has Changed

- Twenty years of changes at federal, state, regional, and local levels
- Related BART Policies, resolutions, etc. have been updated and reflect the most current thinking on BART's goals:
 - Strategic Plan Framework (2015)
 - Asset Management Policy (2019)
 - Station Access Policy (2016)
 - Transit Oriented Development Policy, Affordable Housing Policy (2016), and related work
 - Environmental Justice (2016)
 - Sustainability Policy (2017)
 - 2020 Seamless Transit Principles as adopted by BART Board (2020)
 - Link21 Goals & Objectives
- Current policy does not fully address infill stations
- Evaluation criteria (Attachment B) are based on out-of-date FTA New Starts criteria
 - now Capital Investments Grants Program (CIG) criteria

Need for Policy Update: Shifting Federal Policy

2002 BART SYSTEM EXPANSION CRITERIA	2016 FTA CAPITAL INVESTMENT GRANTS (CIG) CRITERIA <i>*Currently being updated</i>
<i>Transit Supportive Land Use & Access</i>	
Existing Land Use	Station Area Development
Existing Intermodal Connections	Existing Station Area Facilities
Land Use Plans and Policies	Transit Supportive Plans and Policies (Economic Development)
	Parking Supply
	Affordable Housing
<i>Ridership Development Plan</i>	
Ridership Threshold	Mobility Improvements
Station Context	
<i>Cost Effectiveness</i>	
Cost per New Rider	Cost per Trip
Cost/Transportation System User Benefit	-
<i>Regional Network Connectivity</i>	
Regional Transportation Gap Closure	
<i>System and Financial Capacity</i>	
Core System Improvements	
Capital Finance Plan	Local Financial Commitment
Operating Finance Plan	Local Financial Commitment
<i>Partnerships</i>	
Community and Stakeholder Support	Tools to Implement Transit-Supportive Plans and Policies
<i>Environmental Benefits</i>	
	Congestion Relief
	Air Quality & Greenhouse Gas Emissions
	Energy Use

Policy Context: Regional Planning & Coordination

- Any significant expansion to the BART system will require regional support in order to secure federal and regional funding
- In addition to meeting BART-specific goals, any proposed expansion of the BART system must take into account priorities established through the regional planning process, such as:
 - MTC Resolution 3434 (to be updated)
 - Plan Bay Area 2050 (and future updates)
 - Blue Ribbon Transit Recovery Task Force
- A proposed expansion should show positive contributions to regional goals, such as reducing greenhouse gas emission and vehicle miles traveled

Kicking Off a Policy Update: Updating Goals & Strategies

- Strengthen District’s Commitment to
 - Land use: density, affordability, transit-supportive land uses
 - Racial & Economic Equity
 - Environmental targets: reduction of Vehicle Miles Traveled (VMT), Greenhouse Gas (GHG)
 - Core Impacts: Capacity and resilience
 - Fiscal Sustainability: Responsible investments
- Better reflect BART Strategic Plan goals related to:
 - Equity
 - Environment
 - Experience
 - System Performance
- Continue focus on customer experience, economy, and ridership
- Alignment with FTA Capital Investment Grants (CIG) criteria, updated MTC TOC Policy

Kicking Off a Policy Update: Define Applicability

- Communicate to Jurisdictions BART’s process for considering expansion
- Focus on the main goals for an expansion/enhancement Project
 - Implementation strategies may vary based on Project Type
- Policy should be broad enough to cover:
 - New stations and line extensions (including outside the District if justified)
 - Infill stations
- Change Policy from a “System Expansion” Policy to a “System Development Policy”

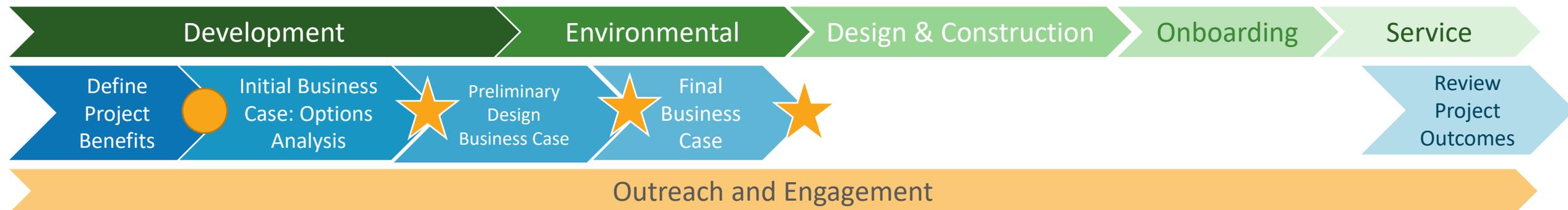
Kicking Off a Policy Update: Redefine Policy Structure

- Policy focus on goals, supported by objectives and strategies
- Identify critical areas that must be adaptable and change over time
 - Incorporate references to other policies inside and outside BART
 - Avoid inclusion of criteria that get outdated much faster than statements of principle
- Ensure policy communicates clearly, for example, in providing clear guidance to jurisdictions
- Implementation adapts to project needs and is addressed with processes identified at staff-level

Kicking Off a Policy Update: Rethinking Implementation

- Business Case Process: Iterative assessment over life of project
 - Informs decisions to advance (or refine) project over life of project
 - Includes strategic, economic, financial and deliverability/operations cases
 - Allows iterative assessment over time project lifecycle - progressively elaborated
 - Adaptable and scalable to project size/impact
- Maintain multiple decisions points - potential to revisit as new information developed
- Business case process is an evolving industry best practice - especially for megaprojects

Conceptual Process Overview



DRAFT: actions related to business case/policy application



Next Steps

