



BART System Development Policy Update

September 14, 2023



Update Overview

- Existing Policy is over 20 years old: policy adopted in 1999, attachments adopted in 2002
- Policy update process to date
 - Outreach to public survey & agency engagement
 - Draft Policy presented in Fall 2022
 - Board feedback
 - Interest in understanding how projects originate
 - Concerns about fully addressing equity in a business case process
 - Support for comprehensive and transparent analysis
- Key Revisions
 - Minor text edits and updated process diagram
 - Staff developed Business Case procedures to further define implementation

Proposed Policy Framework Overview

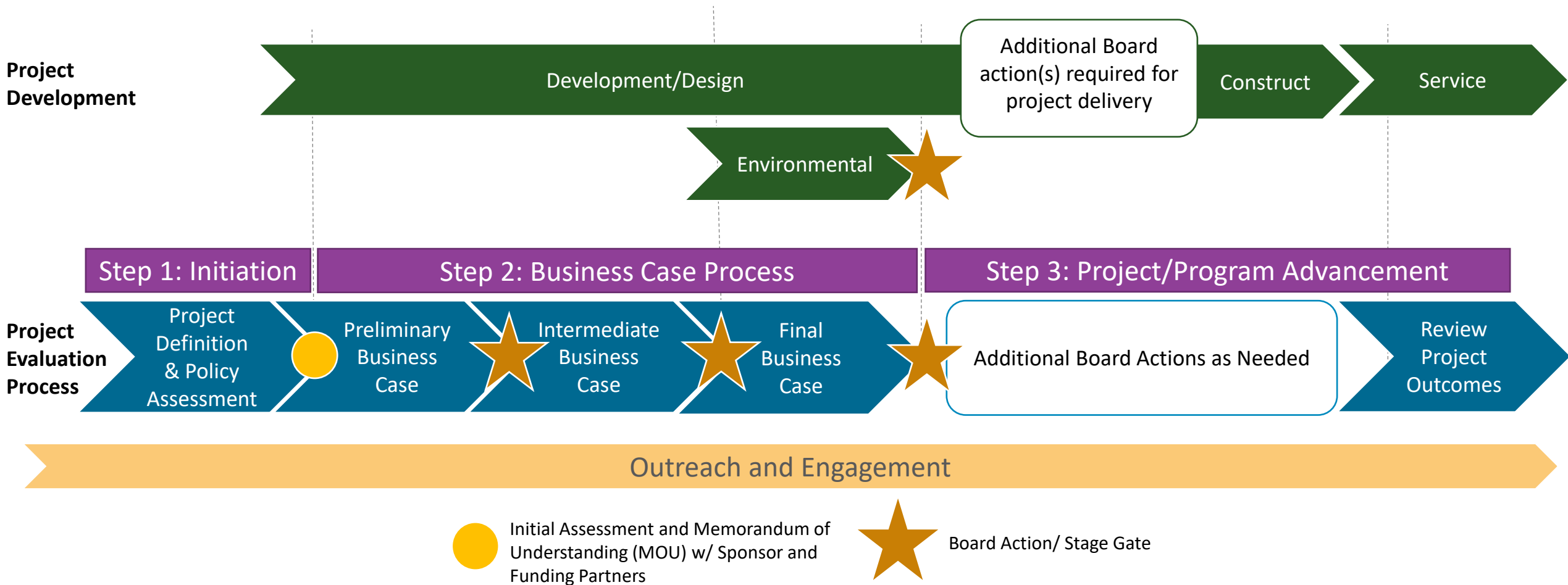
1. Purpose: evaluation framework for proposed new line extensions and stations (including infill)
2. Goals and Objectives
 - a) Support regional livability and a sustainable, equitable, and prosperous Bay Area
 - b) Better serve communities and improve the rider experience
 - c) Support stewardship of the BART District & taxpayer investment
3. Implementation Process: project evaluation with business case framework
 - a) Business Case: Reasoning and justification for initiating a project
 - b) Not solely 'business' - how project supports BART's vision and mission

Proposed Goals and Objectives

Proposed Policy Goals	Proposed Policy Objectives*
Support regional livability and a sustainable, equitable, and prosperous Bay Area	<ul style="list-style-type: none"> • Increase ridership and transit mode share • Ensure transit-oriented communities bolster BART extensions and infill stations • Advance BART, state, and regional environmental goals
Better serve communities and improve the rider experience	<ul style="list-style-type: none"> • Ensure equity by prioritizing the needs of transit-dependent riders • Improve multimodal connectivity • Improve rider experience by enhancing service reliability and connectivity, reducing crowding, and providing a safe and healthy environment
Support stewardship of the BART District & taxpayer investment	<ul style="list-style-type: none"> • Ensure the District’s long-term financial sustainability • Deliver cost-effective improvements that meet riders’ needs • Improve system performance and resiliency without detracting from existing service or overburdening existing assets

* See Policy Document for Full Language on Objectives

Proposed Implementation Process*



Step 1: Project Initiation

- Project Proposed by:
 - BART to address a strategic need; or
 - State or regional entity; or
 - Local jurisdictions, funding or planning agencies, and other entities.
- Project Definition to Begin the Business Case Process:
 - Problem statement defining opportunity and key issues
 - Vision statement, project goals and objectives and conceptual scope
 - Set of proposed options (including non-BART)
 - Be a named project in MTC’s Plan Bay Area transportation project list (or working towards inclusion)
- Policy consistency with Federal, State, local, and BART guidelines/programs
 - Examples: this policy, BART TOD Guidelines, MTC policies, FTA New Starts
- If determined to be consistent and funding for the Initial Business Case identified, BART and partners enter into an MOU

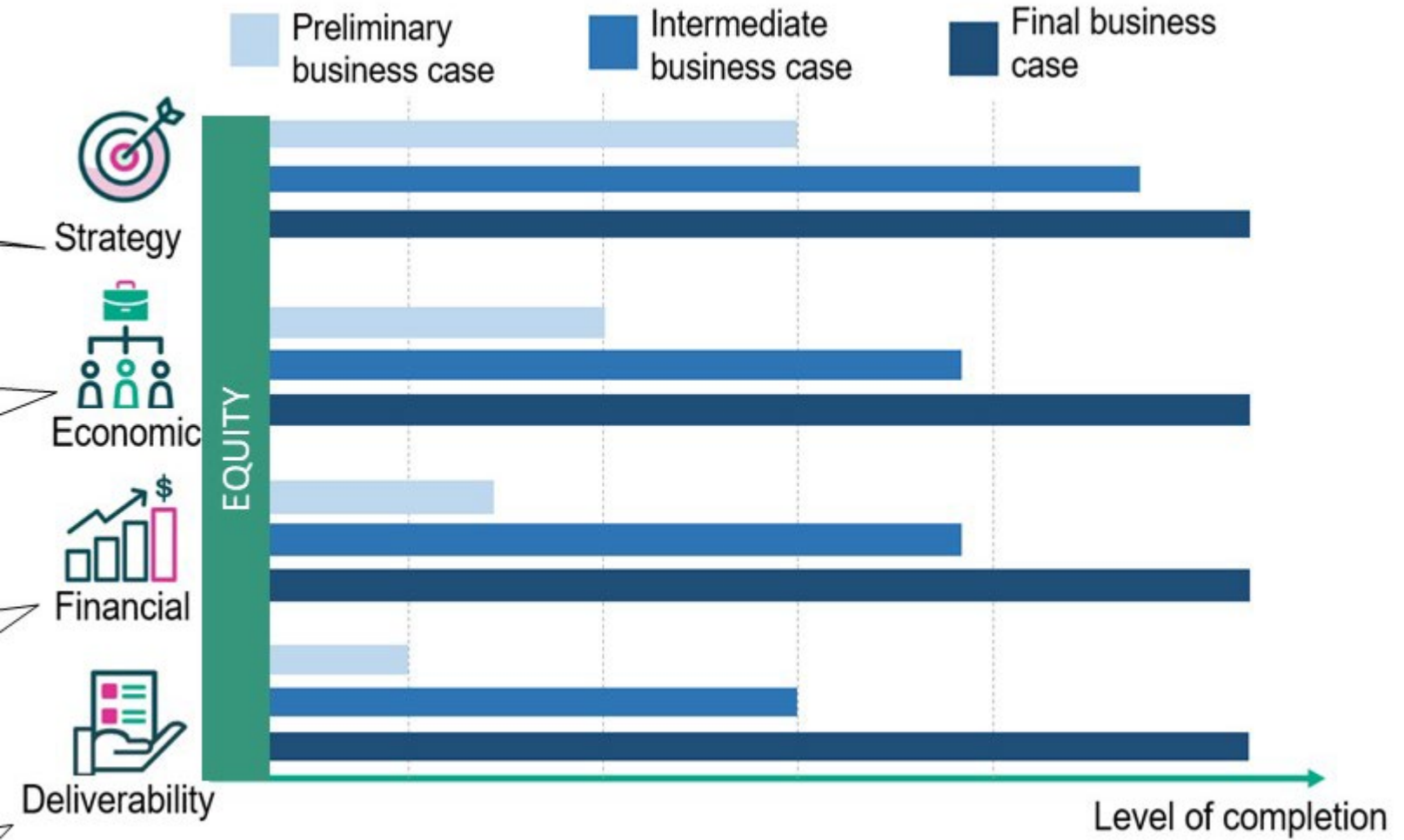
Step 2: Business Case Evaluation of 4 Elements

Defines the strategic need, alignment with BART's goals and objectives, and consistency with the Federal, state, regional, and local policies

Costs and benefits to the region and individual riders and core impacts on system service levels

Financial impact (capital, operating, and revenue) of implementation; develop funding and management plans

Risks and requirements in delivery and operations; develop procurement, operating, and maintenance plans



Step 3: Project/Program Advancement

- As a project proceeds beyond the final business case and environmental review, additional Board actions may be required
 - Project may warrant regular updates and/or additional stage gates
 - New action may be required if there are substantive changes to the project, conditions, and/or cost
 - Projects may include in-service evaluation
- In all cases project delivery will require further board action(s) in parallel to policy advancement (i.e. contract award, etc)

Next Steps

- Discussion and Final Revisions
- Seek BART Board approval Fall 2023

Discussion

