

**SAN FRANCISCO BAY AREA RAPID TRANSIT DISTRICT**  
2150 Webster Street, P. O. Box 12688, Oakland, CA 94604-2688

**NOTICE OF MEETING AND AGENDA**  
**BOND OVERSIGHT COMMITTEE**

Friday, April 18, 2025  
9:30 a.m. – 1:00 p.m.

COMMITTEE MEMBERS: Chairperson Michael McGill, Vice Chairperson Cindy Simon Rosenthal, Sonja C. Stewart, Janey Wang, Suzanne Loosen

A Meeting of the Bond Oversight Committee will be held on Friday, April 18, 2025, at 9:30 a.m. in the BART Board Room, 2150 Webster Street, 1<sup>st</sup> Floor, Oakland, California 94612.

**This will be an In-Person Meeting in the BART Board Room, 2150 Webster Street, 1<sup>st</sup> Floor, Oakland, California 94612 with an option for public participation via teleconference.**

Presentation materials will be available via Legistar at <https://bart.legistar.com>

You may attend the Committee Meeting in person or join the Committee Meeting via Zoom by calling 1 (833) 548-0282 and entering **access code** 846 8678 3542; logging in to Zoom.com and entering **access code** 846 8678 3542; or typing the following Zoom link into your web browser:  
(<https://us06web.zoom.us/j/84686783542>)

**If you wish to make a public comment:**

1. Submit written comments via email to [rrussel@bart.gov](mailto:rrussel@bart.gov), using “public comment” as the subject line. Your comment will be read into the record and will become a permanent part of the file. Please submit your comments as far in advance as possible. Emailed comments must be received before 9:00 a.m. of the day of the Committee meeting in order to be included in the record.
2. Appear in person and request to make a public comment.
3. **Call** 1 (833) 548-0282, enter **access code** 846 8678 3542, dial \*9 to raise your hand when you wish to speak, and dial \*6 to unmute when you are requested to speak; log in to Zoom.com, enter **access code** 846 8678 3542, and use the raise hand feature; or join the Committee Meeting via the Zoom link (<https://us06web.zoom.us/j/84686783542>) and use the raise hand feature.

**Public comment is limited to three (3) minutes per person.** If public comment is by phone, your phone will be muted until you are called upon.

**AGENDA**

1. **Call to Order** (Approximately 5 minutes)
  - A. Roll Call
2. **General Public Comment** (3-minute limit per speaker)
3. **Remembering Committee Member Vinit Shrawagi and Assistant Chief Lyn Williams** (Approximately 15 minutes)
4. **Administrative Items:** (Approximately 45 minutes)

- A. Approval of September 20, 2024 Meeting Minutes (For Discussion/Action)
- B. Adoption of Meeting Schedule for July 1, 2025 – June 30, 2026 Term (For Action)
  - 1. Meeting Schedule: September 19, 2025, January 16, 2026, April 17, 2026, June 19, 2026
- C. Adoption of Committee Procedure (For Action)
  - 1. Bond Oversight Committee Standing Rules
    - 1. Attachment: Bond Oversight Committee Standing Rules Track Changes
  - 2. Committee Protocols Governing Communications with BART Staff
    - 1. Attachment: Committee Protocols Governing Communications with BART Staff Track Changes
- 5. **Agenda Setting and Future Planning Workshop Part 2** (For Information)
  - 5.A.1 BART's Context and Budget Strategy (Approximately 20 minutes)  
Committee Q&A (Approximately 10 minutes)
  - 5.A.2 Regional Measure Update - Recent Polling and Legislation (Approximately 20 minutes)  
Committee Q&A (Approximately 10 minutes)
  - 5.A.3 Capital Program Overview (Approximately 20 minutes)  
Committee Q&A (Approximately 10 minutes)
  - 5.B. Attachment: Measure RR BART Safety, Reliability and Traffic Relief Program Appendix
- 6. **Future Agenda Items & Questions** (For Discussion) (Approximately 5 minutes)
- 7. **Committee Member Announcements** (For Discussion) (Approximately 5 minutes)
- 8. **General Public Comment** (3-minute limit per speaker)
- 9. **Adjournment**

BART provides services/accommodations upon request to persons with disabilities and individuals who are limited English proficient who wish to address Committee matters. A request must be made within one and five days in advance of Board/Committee meetings, depending on the service requested. Please contact the Office of the District Secretary at (510) 464-6083 for information.

## San Francisco Bay Area Rapid Transit District

### Measure RR Program

### BART Bond Oversight Committee

Friday, September 20, 2024

9:30 AM – 12:00 PM

### Draft Minutes

Agenda Item	Meeting Notes
1. Call to Order	9:30am Chair McGill calls meeting to order
A. Roll Call	Staff conducts roll call. Shrawagi absent. All other members present.
2. Public Comment	Aleta Dupree made a comment expressing the importance of Bond Oversight Committee and need to ensure a state of good repair to prevent service disruptions.  No written public comment was received. No comments on Zoom.
3. Administrative Items <ul style="list-style-type: none"><li>a. Meeting Minutes</li><li>b. Review of Tentative Schedule for 2025 – 2026 Term</li><li>c. Discuss AB 1234 Ethics Training Schedule</li></ul>	Committee Member Stewart, request edits to meeting minutes item 7 Future Agenda Items & Questions/Committee Member Announcements to clarify the comment/question that was made to include the tools, processes and documentation used to manage risk like the shortfall in funding.  No additional comments were received on the meeting minutes.  Motion approve June Minutes with changes Loosen. Second Wang. Roll Call Vote. Motion Passes. 3 Yes, 1 Abstain 1 Absent  Russell, Measure RR Program Manager, introduced the 2025-2026 calendar and the calendar will be voted on during January 2025 meeting. Committee members will provide comments via email.  Russell introduced the AB 1234 Ethics Training. Training is required every 2 years BART Bond Oversight Committee Host training typically during the month of April. 2hr training.  All members expressed that they have been trained within the last two years.

	<p>Russell will provide training in April for any new members to the committee.</p>
<p>4. Annual Report Committee Debrief July 11th Board Presentation</p>	<p>Committee Member Rosenthal provided an overview of the July 11<sup>th</sup> presentation of the Annual Report to the BART Board of Directors and described the subcommittee process of working with staff. The goal this year was to take a fresh look at the report, reorganize it, make it accessible, and add detail when possible. This was well received by BART Directors.</p> <p>Feedback received from the Directors was very positive, around accessibility and that the report is a very useful document. Some challenges that were expressed showed a desire to dig deeper and conduct a proactive analysis of Measure RR. The landscape of transit systems has changed and now is an opportune time to reflect on how we are adjusting post pandemic. Consider doing some exploration, set aside time to take the opportunity to ask is BART changing its priorities for Measure RR, can we show that Measure RR is dynamic? Step back and look at the big picture, since we are halfway done, and we are at a different place since when we got started.</p> <p>Rosenthal recommends reappointment of 2024 subcommittee members to 2025 Annual report subcommittee.</p> <p>Committee Member Wang, for future format recommends more data visualization, more accessible data. Where the public can just click to access or link directly to a certain project. More interaction with the public.</p> <p>Sylvia Lamb, Assistant General Manager Infrastructure Delivery, we will also look into updating the Measure RR website to make it more user friendly</p> <p>Chris Filippi, BART Communications, suggest the Annual Report subcommittee meet before next year to begin incorporating suggestions.</p> <p>Rosenthal, suggests a workshop to discuss priorities and the current landscape. How does the drop in ridership affect priorities? How does</p>

	<p>the RR program adjust to the new landscape, are some projects moved up or moved down in priorities? This is not a deep dive subcommittee topic and is important for the entire committee to be engaged in this discussion.</p> <p>Stewart, suggest that it would be helpful to dig deeper and ensure we are doing our due diligence.</p> <p>Committee Member Loosen, seconds Rosenthal's suggestion for a deeper look at how BART is dealing with ridership changes and landscape now as compared to 2019. This is something that we should be aware of. How is BART positioning itself for a future bond measure?</p> <p>Wang, agrees with the proactive analysis we need to look forward and with a broader prospective. We can look at environmental justice on specific projects.</p> <p>Lamb, The BART Board of Directors hosts a workshop once a year. We could plan a workshop style format for the Bond Oversight Committee.</p> <p>Russell, committee members can provide a list of topics that they would like covered in the workshop.</p> <p>Stewart, can we provide a presentation on the overall funding shortage for BART and other transportation organizations in the United States, so that we can compare them and understand if issues are BART-specific or are common to other agencies?</p> <p>Chair McGill agrees to do a workshop to identify parts of Measure RR that don't make sense anymore or need more detail. Once this is identified it can be taken back to the BART Board for direction on how to move forward with addressing them.</p> <p>Lamb, Capital Improvement Program will be presented to the BART Board on September 26<sup>th</sup>. A portion of the workshop can include funding,</p>
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	<p>Capital Improvement Program (CIP), and fiscal cliff.</p> <p>Chair McGill, in December there will be new BART Board Directors. Can the committee participate in the onboarding so that the committee is up to speed with the BART Board?</p> <p>Motion to reappoint subcommittee members include: Shrawagi (Subcommittee Chair), Loosen, Rosenthal for 2025 Annual Report Committee made by Rosenthal. Second made by Stewart, Roll Call Vote. 5 Yes, 0 Abstain, 1 Absent. Motion Passes.</p>
5. Measure RR BART Safety, Reliability and Traffic Relief Program Presentation	<p>Rachel Russell, Measure RR Program Manager, presented the Bond Oversight Committee Framework quarterly agenda.</p> <p>Joy Sharma, Chief Delivery Officer, presented an overview of the Annual Review of the Measure RR program.</p>
A. Measure RR Overall Progress	<p>Russell, presented an overview of Measure RR Project Success for 2023-2024.</p> <p>Stewart, asked for clarification on how Cost Performance Index (CPI) and Schedule Performance Index (SPI) is impacted when a new project is added.</p> <p>Lamb, provided clarification on how new projects are added. Planned spending is in the program level. The CPI and SPI does not increase because the project is added. It increased because the overall program is performing well.</p> <p>Rosenthal, on the Program Level Schedule Update slide 7, we show the projection/forecast going out to 2038, we don't do that on the RR Overall Program Budget Progress slide 5. I'm wondering if at the rate we are going will we level off and start to come down? Suggest extending graph on RR Overall Program Budget Progress slide 5 to show the trajectory.</p> <p>Lamb, suggest an alternative on RR Overall Program Budget Progress slide 5, this slide is meant to show how we are handling the tranches. It might be helpful on slide 6 Measure</p>

	<p>RR Cashflow, to add a column that shows when we expect each program to be completed.</p> <p>Rosenthal, agrees with the suggested approach and recommends changing the title of RR Overall Program Budget Progress slide 5 to Management of Revenue and Spending.</p> <p>Loosen, ask if “Drill Down” means details. Can we change the term “Drill Down” to “Detail” slide? This could help make it clearer to the public.</p> <p>Lamb, suggests the Deep Dive Committee take a look at the drill-down slides to see if they are still needed or if data should be conveyed differently.</p> <p>Rosenthal agrees with Loosen on amending the term “drill” down.</p> <p>Rosenthal points out that the comments on the Relieve Crowding slide are helpful to provide context on the project and program priorities.</p>
B. 10-Minute Break	6 min break
C. Measure RR Program Updates a. Office of Civil Rights	<p>Joseph Towner, Manager of Program Planning Support presented an update on Office of Civil Rights Small Business Outreach.</p> <p>Wang asked what the attendance is for the online meetings.</p> <p>Towner responded that attendance depends on the topic. For popular topics we see about 80-90 attendees.</p> <p>Stewart, mentioned that she attended a Small Business event and felt it was very helpful.</p>
D. Program Status & Milestones	<p>Rachel Russell, Measure RR Program Manager presented the Program Status &amp; Milestones.</p> <p>Wang, regarding renew crowding in the drill down the comments regarding the East Storage Yard. Will the project evaluation affect the milestones?</p> <p>Lamb, the value engineering analysis is part of what added this comment on the watchlist. There is RR funding but this project is also funded by Federal Transit Administration (FTA) and there is a</p>

	<p>funding gap that we will need to figure out before moving forward.</p> <p>Loosen, Station Access Status and Milestones slide 33, the milestone for 19<sup>th</sup> Street Access Improvement Project, why is this on hold.</p> <p>Russell, explained that this project has been placed on hold to reevaluate the need of bike station.</p> <p>Rosenthal, how many years will the 18 shutdowns occur over for the Renew track program?</p> <p>Russell, responded that 18 shutdowns will occur over 3 years.</p> <p>Filippi, provided response on feedback received during the 1<sup>st</sup> shutdown. The plan is still to have 18 shutdowns over 3 years. Whenever shutdowns are postponed, there are notifications to the public.</p> <p>Lamb, explained the complexity of the shutdown in this specific area. Staff are taking lessons learned from the first shutdown and will implement those lessons learned moving forward. We've received positive feedback on the first shutdown. The pause is not because of any negative feedback that was received. We paused to see if there are ways we can make the work more efficient.</p> <p>Chair McGill, asked if the transponders are a major component to ensure trains can move closer together.</p> <p>Lamb, responded that the transponders are a key element in train control and communications to Operations Control Center (OCC), and other trains, and will allow us to move beyond the fixed block systems.</p> <p>Chair McGill asked what the next steps are for Link21 deep dive committee.</p> <p>Stewart, explained that there are remaining discussions scheduled to review the Link21 dashboard to understand how money has been</p>
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	<p>spent and the plan moving forward. There is a deep dive subcommittee meeting scheduled at the end of September.</p> <p>Chair McGill, isn't BART the lead for the Link21 effort but we don't pay for everything how does that work?</p> <p>Lamb explained that BART is taking the lead on planning efforts, but future phases will include other funding.</p> <p>Chair McGill asked if the fire protection requirements such as PFAS are impacting the fire suppression projects.</p> <p>Lamb, explained that we will need to look directly at the projects to see if these requirements are having an impact on the cost. We are keeping a close eye on these projects and we are doing ok on the mechanical projects at this point.</p>
6. Future Agenda Items & Questions	<p>Russell, Measure RR Program Manager, provided an update on member elections. Applications were extended to September 13. Next step is interviews and seek Board approval in December.</p> <p>Russell provided an overview of upcoming meetings, including workshops, committee procedures, 2025 Annual Report, and Project Site Tours.</p> <p>Stewart expressed interest in seeing bicycle channels at 19<sup>th</sup> and 12<sup>th</sup> Street or in San Francisco.</p>
7. Committee Member Announcements	None.
8. General Public Comment	<p>Aleta Dupree provided public comment. Suggest that we revise the term "Drill Down". Aleta discussed the need for fire suppression facilities and appreciates the information about the Small Business and Disadvantaged communities.</p> <p>Introduction of Charlie Castillo, AGM Administration.</p> <p>Chair McGill suggest we explain the terminology that we use. (drill down, frogs, milestones, etc.)</p> <p>No comments were received on zoom.</p>

9. Adjournment	Meeting Adjourned at 11:30 am.
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**San Francisco Bay Area Rapid Transit District (BART) Safety,  
Reliability and Traffic Relief Program**

**Bond Oversight Committee Standing Rules**

**Adopted April 18, 2025**

**STANDING RULES:**

1. Members appointed to the BART Safety, Reliability and Traffic Relief Program Bond Oversight Committee ("Committee") shall be appointed for a two-year Term without compensation. Members are eligible for three, two-year Terms. The BART Board shall appoint the members of the Committee and assign a commencement date. All Terms shall terminate on the second anniversary date of such commencement date. The BART Board may appoint an alternate to each Committee member. If the Committee member is unable to complete his, her, or their Term, the appointed alternate shall fill the vacancy and complete the Term.
2. Each Term shall be two-years.
3. The inaugural Term began July 1, 2017 and ended on June 30, 2019.
4. Meetings shall be held quarterly, and the Committee may elect to change the frequency as long as there are at least four meetings each Term.
5. The meetings will be held at BART headquarters.
6. At the beginning of each Term, the Committee will elect a Chair and Vice Chair. Both shall serve for no more than three Terms.
  - a. The Chair will function as the spokesperson for the Committee.
  - b. Should the Chair resign or be removed, the Vice Chair will immediately become the Chair and the Committee shall elect a new Vice Chair at its next regularly scheduled meeting.
7. Staff will organize and assemble materials for review including construction schedules, scope of work, budget and information about the issuance of bonds. Technical staff will be present at each meeting to guide Committee members through the documents and answer questions.
8. Members must diligently attend meetings. Staff shall maintain meeting attendance records. If a member fails to attend at least fifty percent (50%) of meetings during a

calendar year, staff shall prepare and submit to the BART Board of Directors a report detailing the attendance of the member and recommend appropriate action.

9. The seat will remain open until filled.
10. The Committee is subject to all provisions of the Ralph M. Brown Act, California Government Code Section 54950 et seq. (as amended), which mandates open meetings for local legislative bodies. The public will be invited to attend all committee meetings.
11. Staff will prepare minutes of each meeting.
12. The Committee will publish a public report once per year.
13. Once appointed, Committee members are required to comply with disclosure and conflict of interest requirements of the Political Reform Act of 1974, California Government Code Section 81000 et seq. (as amended), and must complete and file all necessary disclosure documents, including an annual conflict of interest statement. Committee members shall avoid impropriety and the appearance of impropriety, and shall not use their appointed position to further their own financial gain or for any other purpose not directly related to the governmental function they have been appointed to perform. Specifically, Committee membership shall be restricted to individuals without financial interest in any Measure RR program. Committee members are defined as “public officials” (California Government Code Section 82048), and no public official shall make, participate in making, or in any way attempt to use his or her official position to influence a governmental decision in which he or she knows, or has reason to know, he or she has a financial interest. Having a financial interest in a decision is defined by California Government Code Section 87103.
14. Neither the member of the Bond Oversight Committee nor the firm by which they are employed or have an ownership interest in will be eligible to bid on BART Safety, Reliability and Traffic Relief Program work.
15. Once appointed, Committee members are defined as “officers” and hence are governed by California Government Code Section 3201 et seq. (as amended), relating to political activities. Specifically, political activities, such as soliciting or receiving funds or contributions for a candidate or ballot measure during Committee meetings are prohibited.
16. Following orientation, Committee members shall be responsible for having a working knowledge of the establishing ordinance, by-laws, federal or state mandates or any other governing regulations that define and set forth the intent and purpose of their appointment and shall only represent and act on matters related thereto.
17. The BART Board shall retain the authority to rescind any Committee appointment(s), as deemed necessary.
18. The District shall maintain a public information list of members and designated alternates appointed to the Bond Oversight Committee. The list shall include the name of the appointee, the date the Term expires, and affiliation and/or nominating organization. The list shall be updated annually.

19. Committee meeting announcements will be posted alongside BART Board meeting notices outside of the BART Board Room Facility.
20. A Bond Oversight Committee section will be included within the BART website. Information about the Bond Oversight Committee and the Committee's Reports shall be posted in this section.



# Measure RR Bond Oversight Committee

Committee Protocols Governing Communications with BART Staff

Adopted April 18, 2025

## **PURPOSE:**

The purpose of these protocols is to establish clear lines of communication between committee members, so all members are in the loop on the information staff provides members; and to ensure the public has full transparency of committee activities thru the California Public Records Act.

## **PROCEDURE:**

### **SECTION 1: INFORMATION REQUESTS**

- A. Any committee member requesting information from BART staff shall initiate the request in writing and email it to the staff designee.
- B. Any committee members making a verbal request of staff should put the request in writing and email it to the staff designee.
- C. The staff designee shall respond to all member requests via email and shall blind copy the entire committee. The email correspondence must include the initial committee member's request and all related correspondence and attachments.
- D. The staff designee will summarize any verbal correspondence with committee members in writing and email it to the Oversight Committee Chair (Chair).
- E. The staff designee shall immediately forward the correspondence to all members of the Bond Oversight Committee.
- F. The staff designee shall confer with the Chair any request staff believes is outside the scope of the committee's mandate.

### **SECTION 2: MEETING REQUESTS**

- A. Any committee member wishing to meet with staff shall direct the request to the Bond Oversight Committee Chair. The Chair shall have the authority to approve or deny the request.
- B. The Chair shall email all approved requests to the staff designee and invite all committee members to attend the meeting.
- C. The staff designee shall coordinate approved requests and alert the committee of any applicable Brown Act rules.



## ▶ 5.A. Measure RR BART Safety, Reliability and Traffic Relief Program Presentation

Bond Oversight Committee | April 18, 2025



# In Memoriam





# Vinit Shrawagi

Measure RR Bond Oversight  
Committee Member



# Lyn Williams

Assistant Chief Infrastructure  
Delivery Officer



# Agenda Setting and Future Planning Workshop

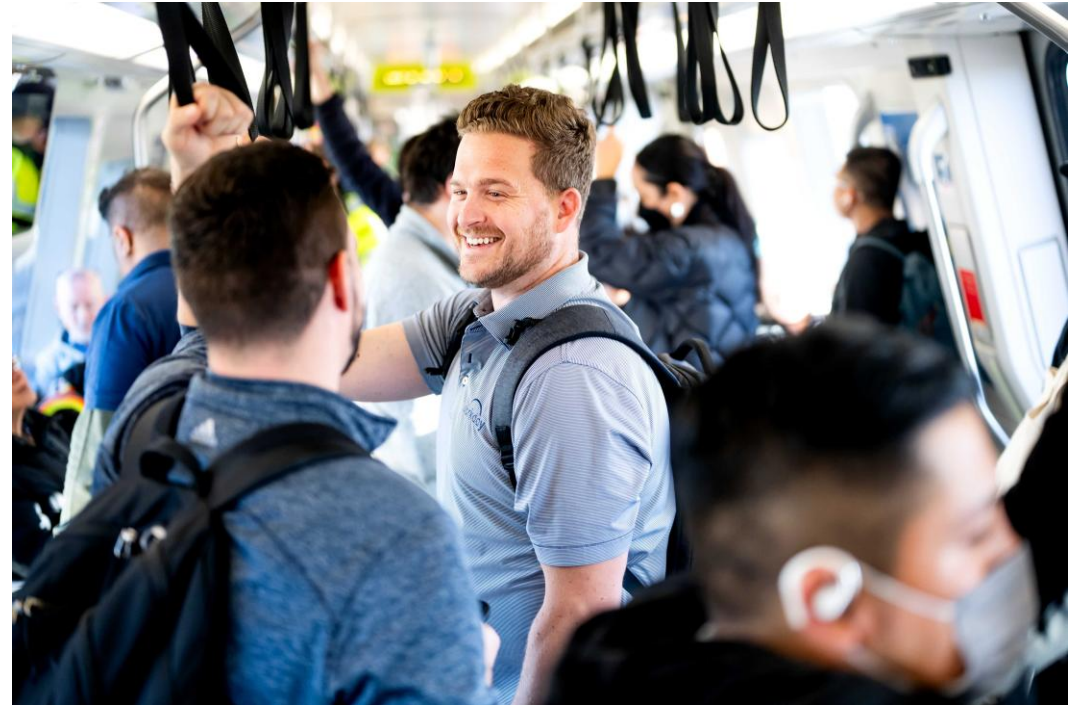
## Part 2





# Workshop Overview

- BART's Context and Budget Strategy
- Regional Measure Update – Recent Polling and Legislation
- Capital Program Overview



# 5.A.1. BART's Context and Budget Strategy



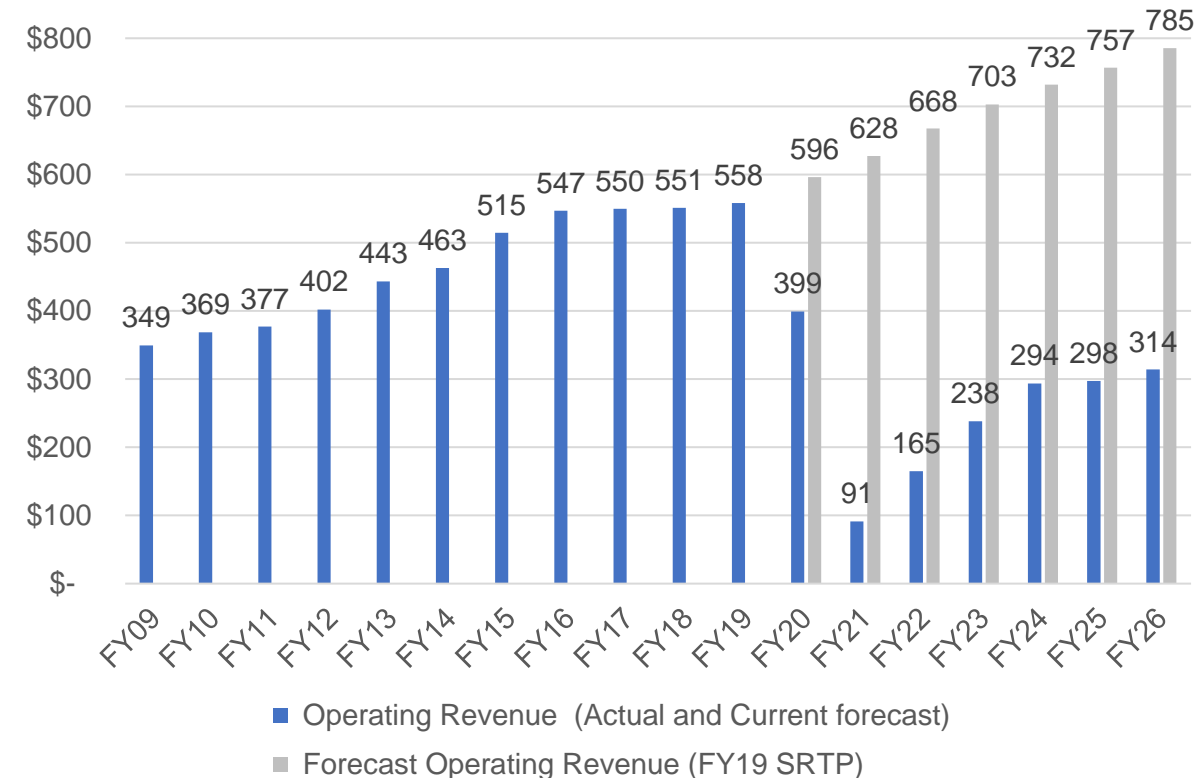
# Facing the Fiscal Cliff

- BART faces a structural deficit that can only be solved with a sustainable operating funding source
  - While BART has been able to secure emergency funding in past years, all effort now needs to be on securing a sustainable source paired with efficiencies and cost control
  - BART's current strategy is to maintain high-quality service while bridging the fiscal gap leading up to a 2026 measure
- Without a sustainable source secured in 2026, BART will be forced to make more difficult tradeoffs, including significant, ongoing reductions in service levels and workforce
- We will discuss in this item:
  - The context in which we operate
  - Our operating budget model and what we are doing to control cost
  - Consequences of the fiscal cliff
  - Our budget strategy and tools to close the gap

# BART's Past Funding Model No Longer Works

- Pre-pandemic, BART covered more than two-thirds of operating costs through operating revenues (fares, parking etc.,)
- FY24 operating revenue (\$294M) was \$438M below pre-pandemic FY24 forecast
- For decades, high BART fare revenue allowed our region to flex public investment to local bus and counties
- In the future, BART will be more reliant on public investment
  - Likely around 70% of operating costs, consistent with peer agencies

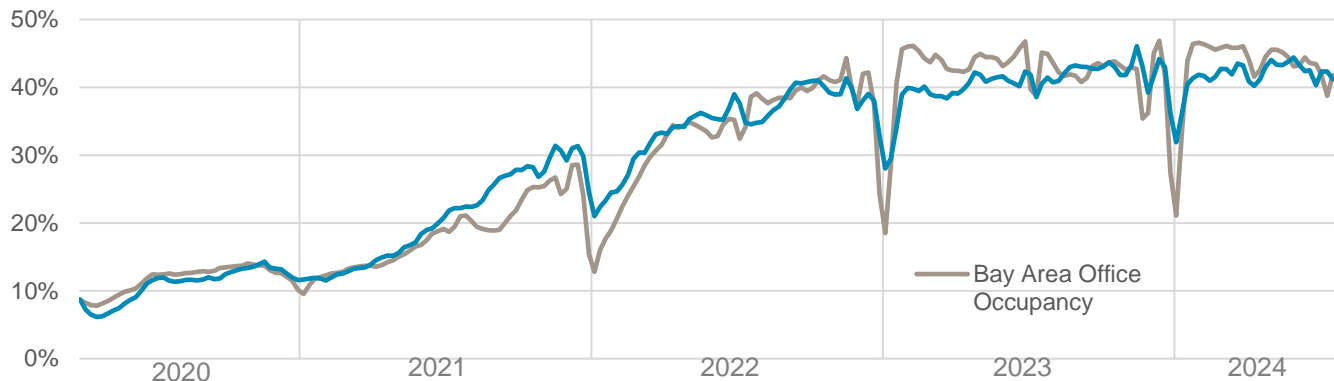
*Operating Revenue vs Pre-Pandemic Forecasts (\$M)*



# Changing Travel Patterns

- Major Bay Area employers are in sectors with the highest remote work adoption – tech, finance, and business
  - Consequently, the region continues to experience the lowest onsite work nationally
- BART ridership trends closely to office occupancy rates
- Most riders have returned, but they are riding less frequently

*Bay Area Return to Return to Office Rate & BART Ridership Recovery*



Source: Kastle Badging Data – 2020 to 2024



**76%**

OF OCTOBER 2019  
RIDERS HAVE  
RETURNED TO BART  
AS OF OCTOBER 2024



**46%**

OF OCTOBER 2019  
TRIPS HAVE  
RETURNED TO BART  
AS OF OCTOBER 2024

**S.F.'s workforce  
keeps moving  
farther away from  
their jobs. Here's  
how far they live**

By **Hanna Zakharenko and Roland Li** | Jan. 31, 2025

4:00 a.m.



San Francisco saw the nation's biggest jump in the percentage of the workers living 50 or more miles from their jobs from 2012 to 2022, compared with the top 25 cities with the largest workforces in the U.S. Experts said this was fueled by remote work and high housing costs.

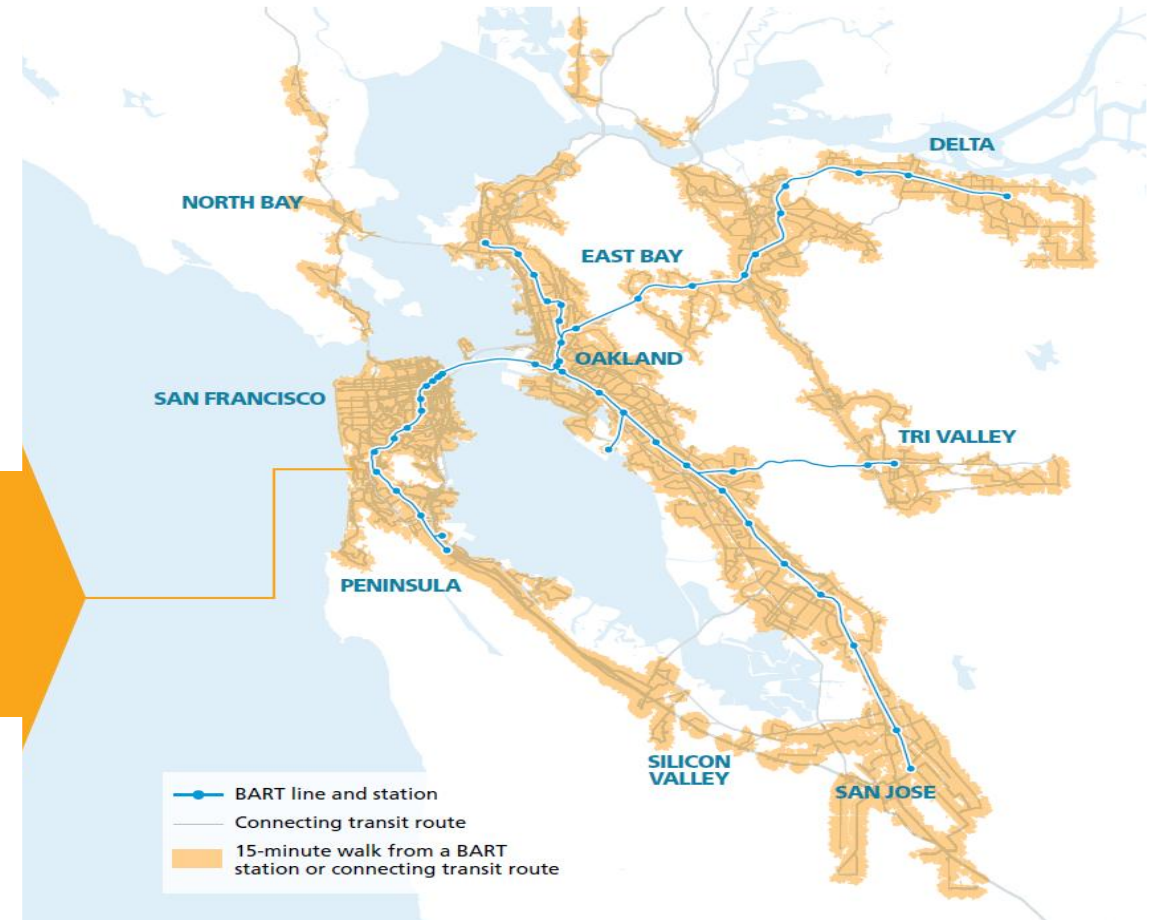




# Regional Connectivity Remains Critical

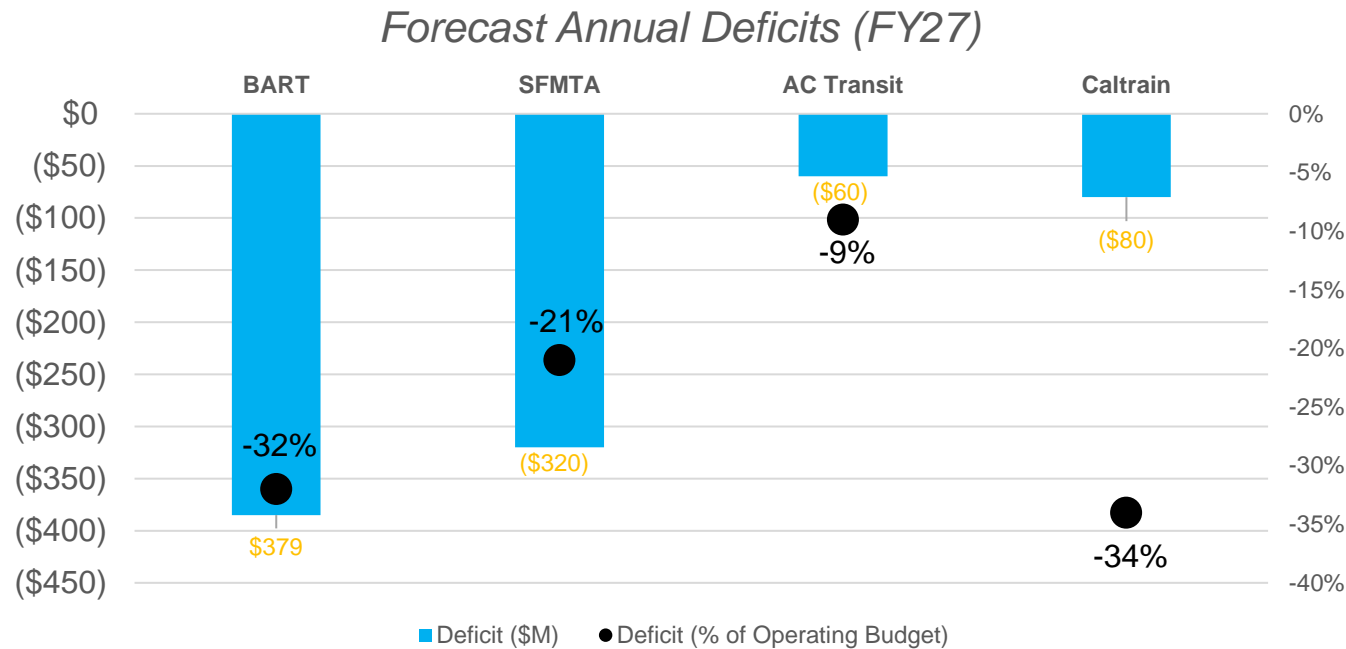
- BART connects many of the region's bus, ferry and rail services
- Nearly 90% of the region's transfers include a trip on BART with more than 300 unique connecting routes
- 17 of the 26 regional public transit operators connect to BART

Within a 15-minute walk  
of BART Stations or a  
connecting transit:  
67% of regional jobs &  
61% of regional residents



# The Funding Challenge is Not Unique to BART

- Several partner agencies in the Bay Area also face operating deficits
- Agencies throughout the country face structural deficits and are facing tough decisions
- BART and rail operators are impacted more than others



## PA: SEPTA has cut \$27 million to reduce a deficit and boost its case for new state transit money

SEPTA is trimming costs as it drafts a new operating budget and hopes to wring new state dollars from the legislature.

By Thomas Fitzgerald

Source The Philadelphia Inquirer (TNS)

Jan. 24, 2025

British Columbia

## TransLink board approves 2025 budget with \$72M shortfall

\$2.5B in spending includes increased revenue from fares, but gap in government cash



Chad Pawson · CBC News · Posted: Dec 04, 2024 1:07 PM PST | Last Updated: December 4, 2024

WP The Washington Post

## Billion-dollar deficits, drastic cuts: Metro faces fiscal catastrophe

Metro is in a financial crisis, threatening the D.C. region's quality of life. Repeated operating deficits of up to a billion dollars are...

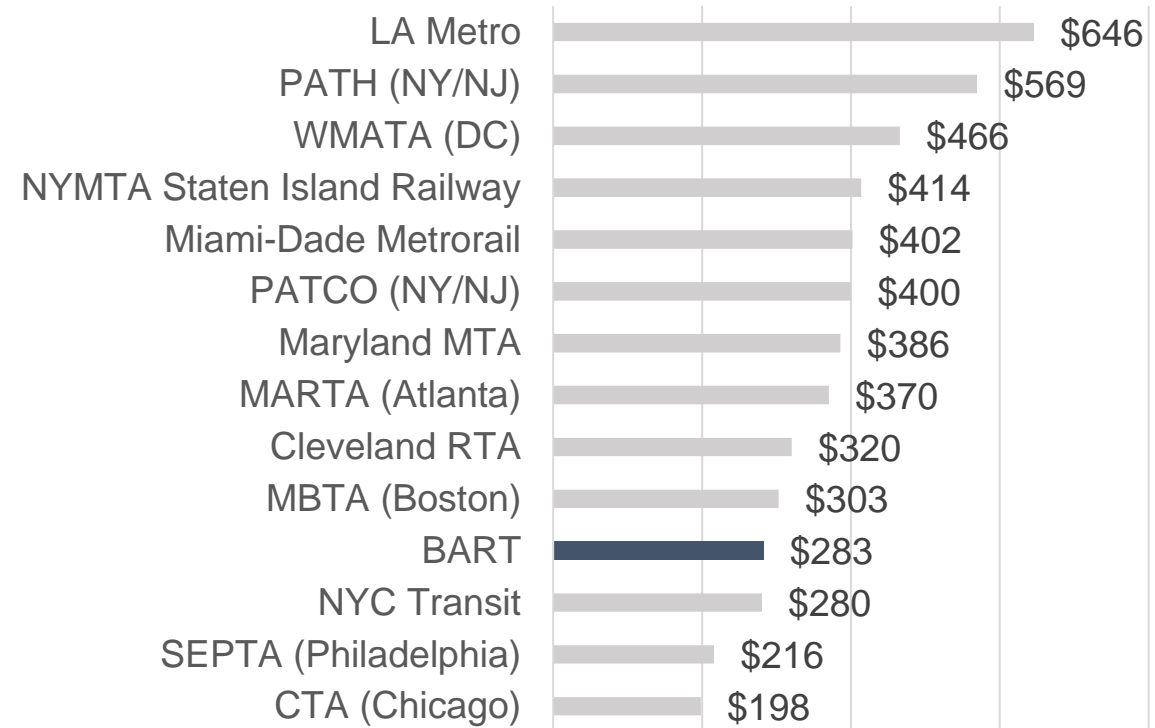
Aug 9, 2024



# BART Operates Efficiently

- Compared to peer rail agencies nationally, BART is an efficient manager of expenses and service delivery
- Since 2019, BART's total operating cost has grown at a rate below inflation (Customer Price Index), despite opening the BART Silicon Valley extension in 2020 and inflation experienced by the transit industry

*US Heavy Rail Services  
Cost per Vehicle Revenue Hour (FY 2023)*



*Source: National Transit Database FY23*

Note: Contiguous US states only

# BART Is Focused on Revenue and Cost Control



## Increase Fare Revenue

- Installing new fare gates to reduce fare evasion
- Maintaining inflation-based fare increases



## Grow Ridership

- Offering new fare products like Clipper BayPass
- Promoting taking BART for non-work trips
- Station activations & events
- Improving transit coordination



## Advance Revenue Generating Programs

- Negotiating new agreements for telecommunications revenues
- Longer term strategies include transit-oriented development and potential sale of excess land



## Labor Savings

- Implementing a strategic hiring freeze while protecting safety and service quality
- Renegotiated with unions to reduce near term retiree healthcare costs



## Targeted Cuts

- Targeted reductions to operating costs across all departments
- Reduced and eliminated some contracts and agreements



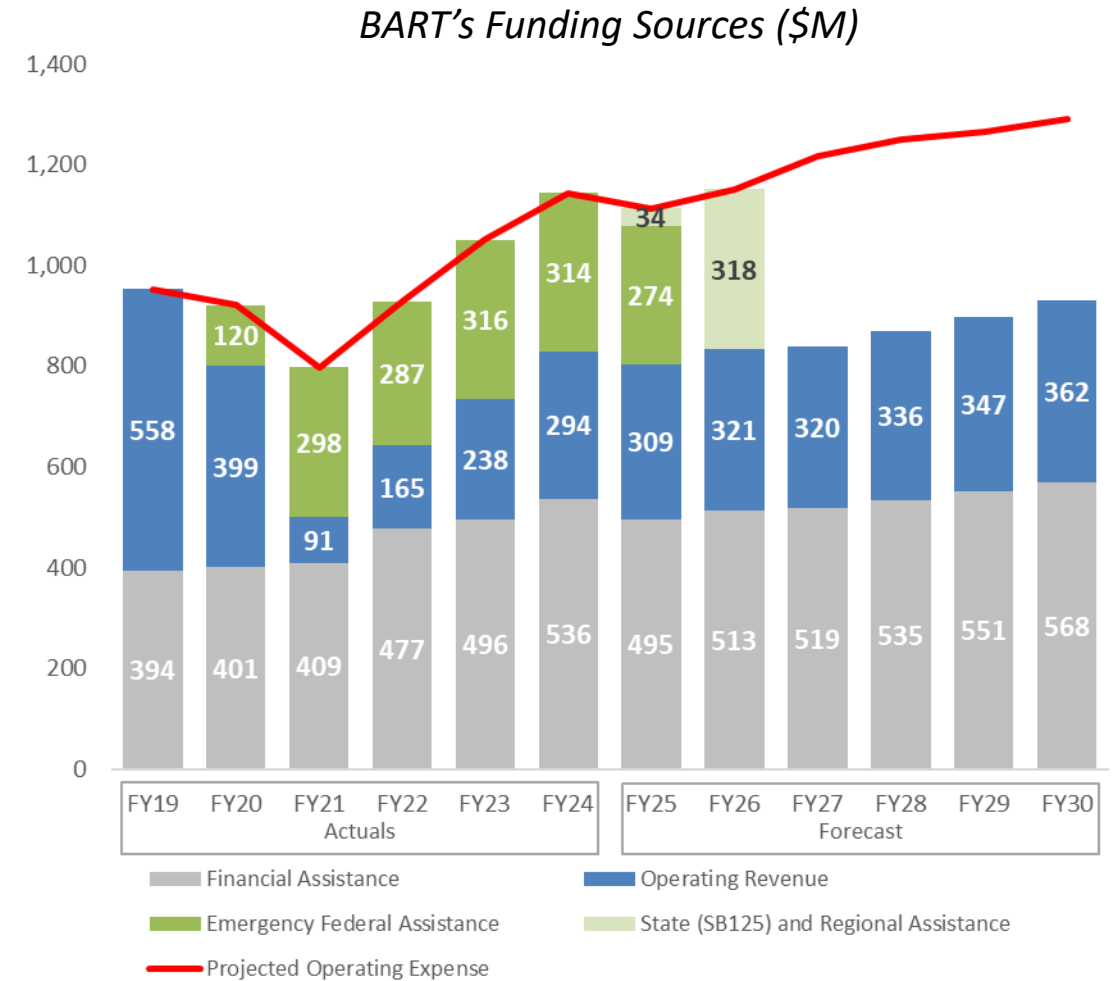
## Efficiencies

- Running shorter trains
- Locked-in low renewable electricity costs
- Implementing operational efficiencies and contract oversight recommendations from the Inspector General
- Modernize technology



# Structural Reduction in Operating Revenue

- BART cannot assume FY19 levels of ridership-generated revenue going forward
- One-time federal, state, and regional assistance will be fully expended by FY26
- Constrained revenues do not support BART's current service levels



# Large Ongoing Deficits Remain

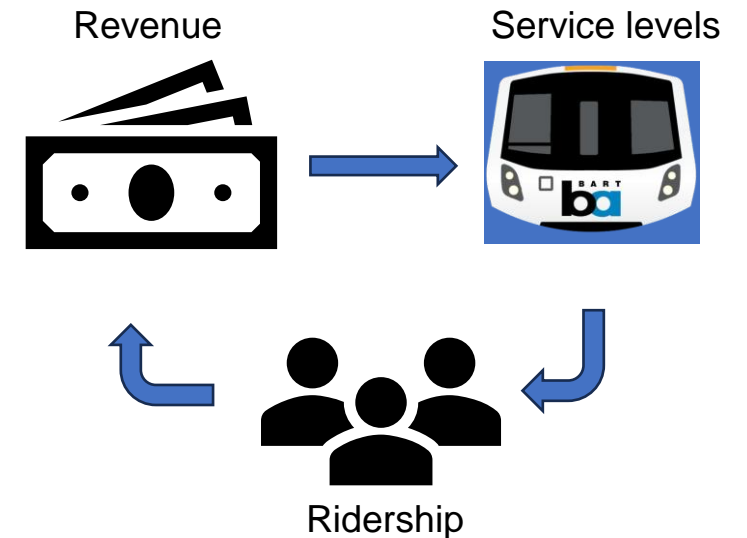
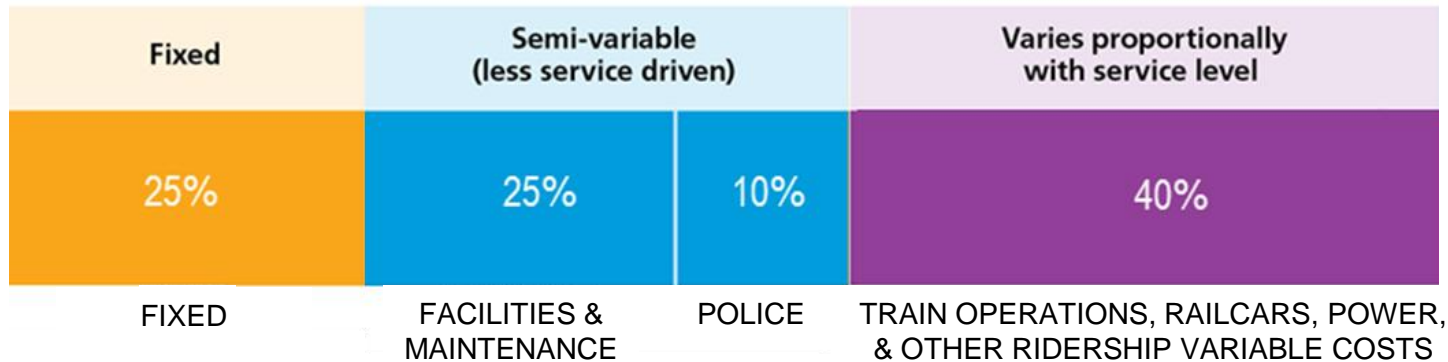
(\$M)	FY26	FY27	FY28	FY29	FY30
Operating Revenue	321	320	336	347	362
Financial Assistance	513	519	535	551	568
Total Revenue	834	839	870	898	930
Operating Expense	1,045	1,087	1,114	1,146	1,164
Debt Service & Allocations	107	131	136	119	128
Total Expense	1,152	1,218	1,250	1,265	1,291
Net Result	(318)	(379)	(380)	(368)	(362)
Emergency Assistance	318	0	0	0	0
<b>Annual Deficit</b>	<b>0</b>	<b>(379)</b>	<b>(380)</b>	<b>(368)</b>	<b>(362)</b>

- FY26 deficit is closed as of FY26 preliminary budget
- Structural deficit of \$350-400M each year remains (\$361M annual average)

# BART Cannot Close Deficits with Service Cuts

- Cutting BART operating expenses requires a disproportionate service reduction
  - Only 40% of BART's operating costs scale directly with service levels
  - In FY20, a 40% service reduction reduced operating cost by approximately 12%
- Transit death spiral: major service reductions also put BART's \$300M+ operating revenue at risk

*BART'S FY 2025 Fixed and Variable Annual Operating Costs*



# BART Cannot Close Deficits with Service Cuts

- Even dramatic service cuts would close less than half of the FY27 \$376M deficit
- Reduced capacity means reduced fare revenue
- Dramatic cuts would make BART an inconvenient travel option, further reducing ridership and fare revenue, beginning death spiral

	Current Service	Scenario 1: ~70% Cut	Scenario 2: ~90% cut
<b>Service Description</b>			
Hours	12AM Close	9PM Close	9PM Close
Train Frequency	20 min	30 min	60 min
Coverage	5-Line, 50 Stations	3-Line, 50 Stations	3-Line, 41 Stations
Weekly Train Dispatches	4,200	1,300	500
<b>Fiscal Impact (\$M)</b>			
Operating Expense Savings	\$0	\$160	\$260
Fare Revenue Impact	\$0	(\$30)	(\$90)
<b>Net Savings</b>	<b>\$0</b>	<b>\$130</b>	<b>\$170</b>
Remaining FY27 Deficit (estimated at \$376)	(\$376)	(\$246)	(\$206)
FTE Impact	0	(600)	(1,050)

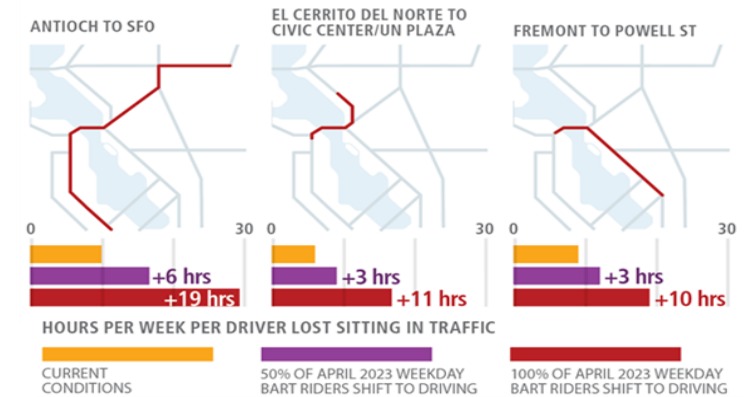
*\*\*Scenarios are from the 2023 SRTP and are for illustration only: Any actual cuts considered would be further analyzed and be informed by outreach and engagement*



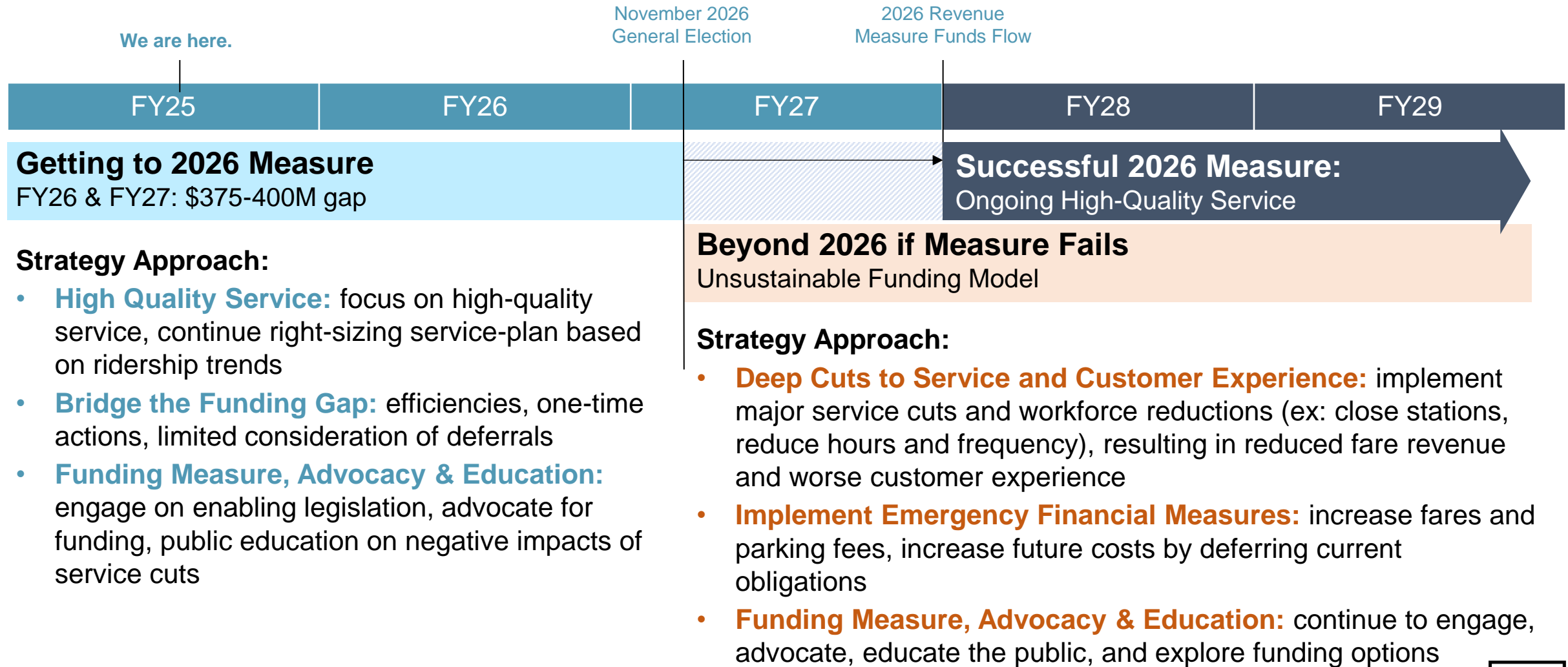
# Regional Consequences of No BART Service

*Weekly Hours Lost To Congestion For Drivers:  
With & Without BART*

- Stifle the Regional Economy
- Exacerbate Congestion
- Increase Emissions
- Undermine the Transit Network
- Impact Communities Inequitably



# Budget Strategy Timeline



# Q&A



## 5.A.2. Regional Measure Update - Recent Polling and Legislation



# Bay Area Voter Views of a Potential Transit Funding Measure



# September 2024 Voter Survey Goals & Methodology

- Gauge overall mood of the 2026 electorate, with specific emphasis on views of public transit
- Assess the viability of a potential five-county measure (Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara) generating operating funds for BART and other transit systems. Test reactions to the following:
  - Potential sales tax and potential parcel tax
  - Framing as preventing closures and service reductions vs. maintaining and improving services

Methodology	
Dates	September 19-29, 2024
Survey Type	Dual-mode Voter Survey (phone/online with contact via phone, email and text); split sample for message framing
Research Population	Likely November 2026 Voters in Alameda, Contra Costa, San Francisco, San Mateo and Santa Clara Counties
Interviews	1,784, with at least 350 per county Languages: English, Spanish and Chinese
Margin of Sampling Error	(Full Sample) $\pm 2.8\%$ at the 95% Confidence Level (Half Sample) $\pm 3.9\%$ at the 95% Confidence Level

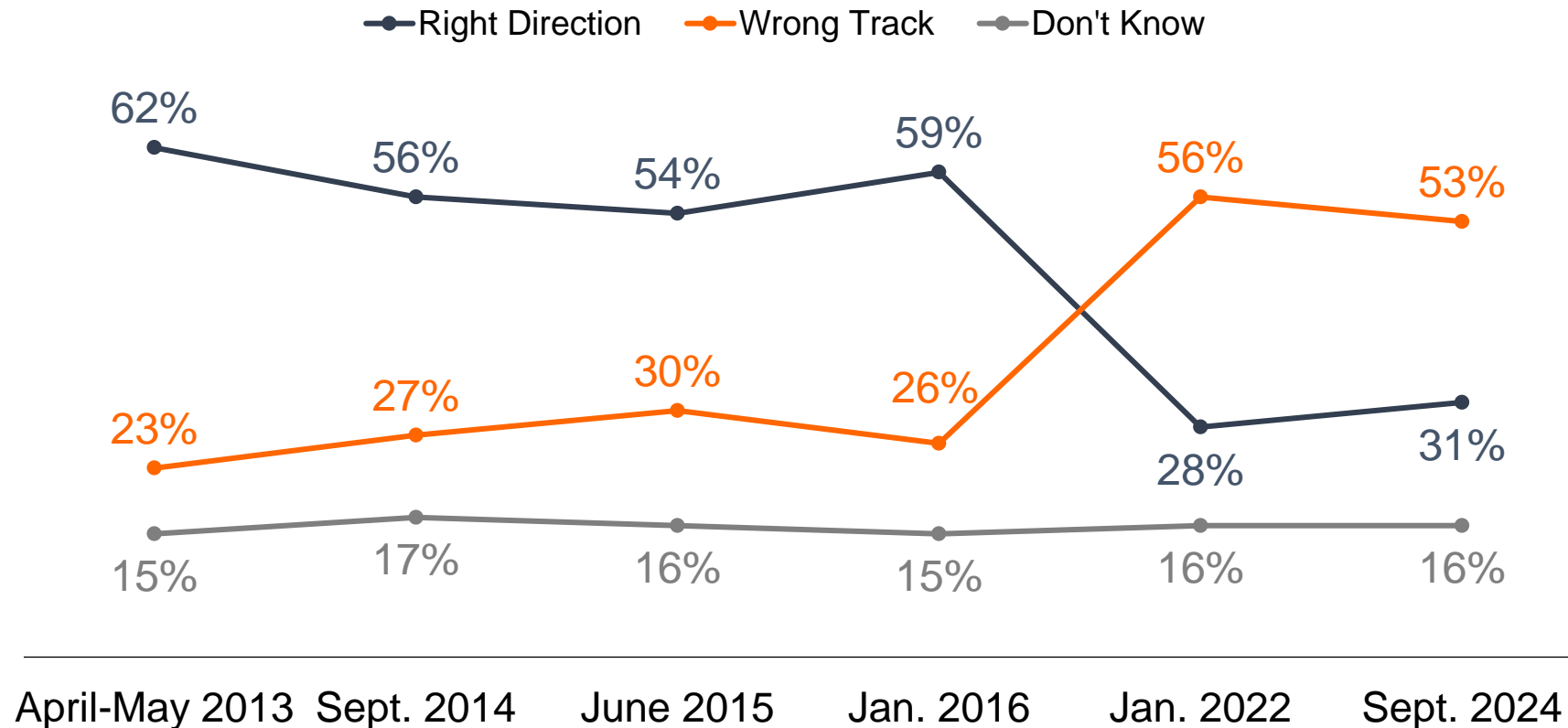
*Survey conducted by FM3 on behalf of BART.*



# Overall Mood

- A majority says the Bay Area is headed in the wrong direction

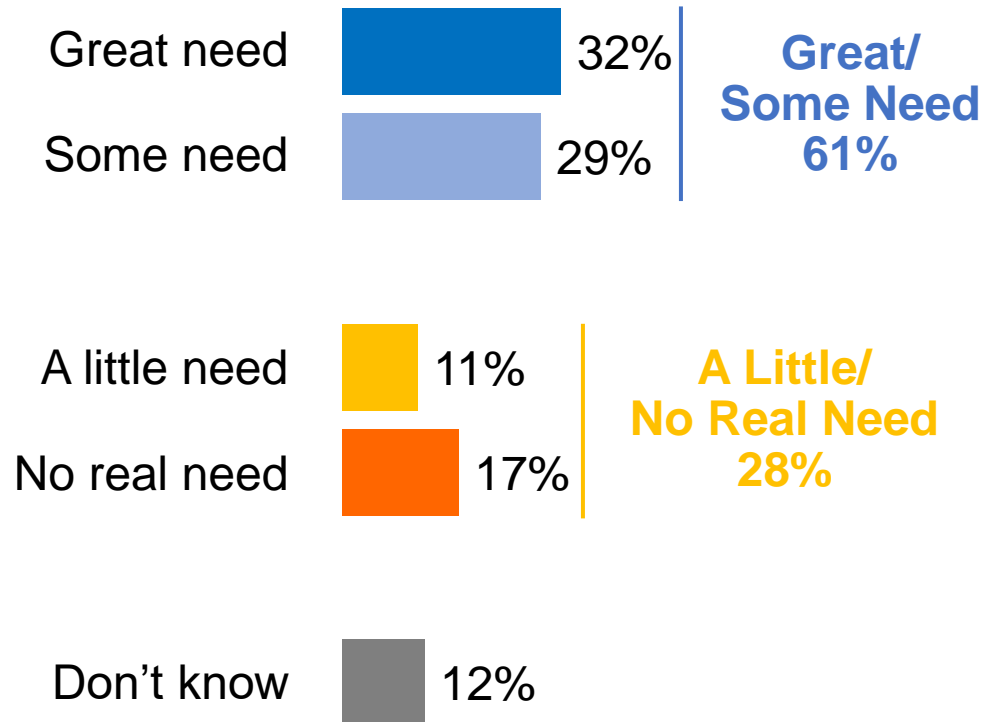
*Would you say things in the Bay Area are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?*



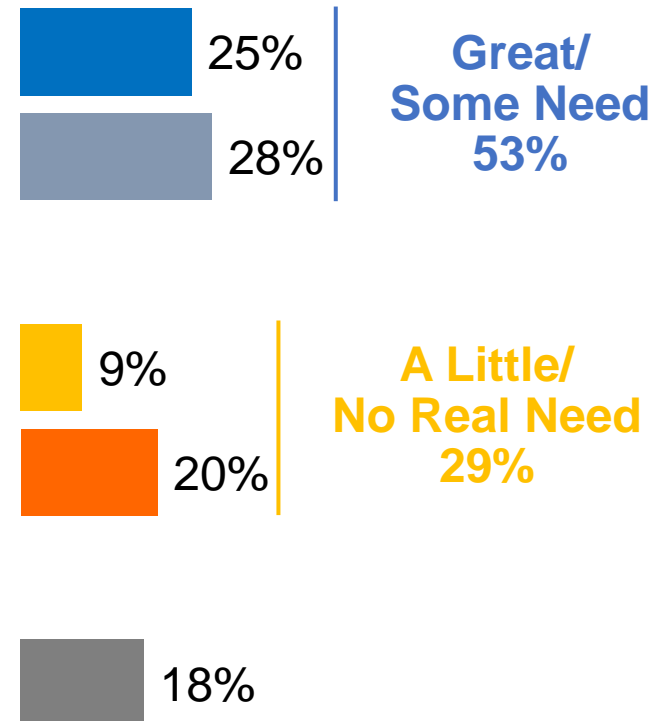
# Need for Funding

- Voters generally see a need for public transit funding – less broadly so for BART specifically

*Would you say that Bay Area public transit, in general, has a great need for additional funding, some need, a little need, or no real need for additional funding?*



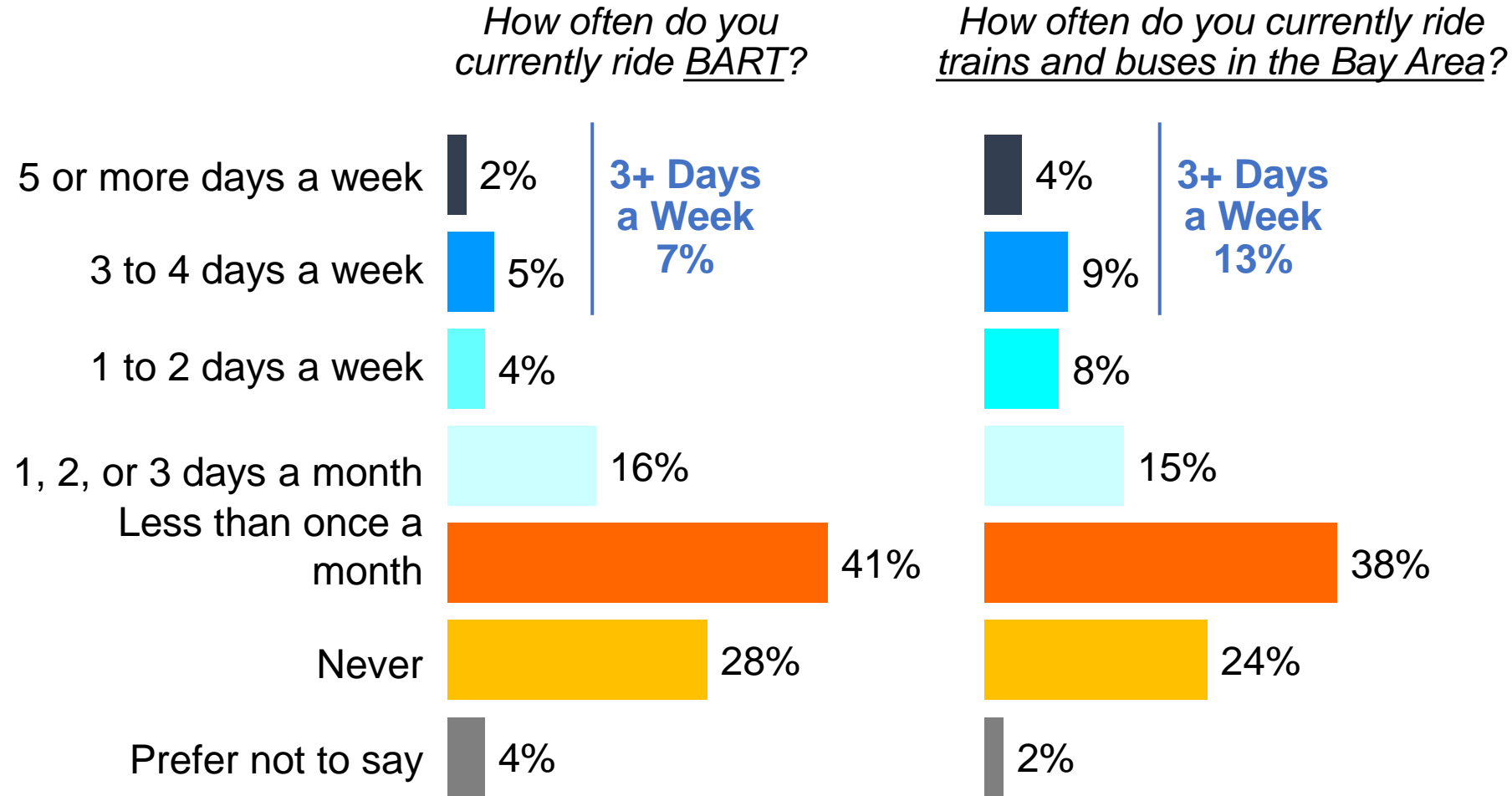
*Would you say that BART, specifically, has a great need for additional funding, some need, a little need, or no real need for additional funding?*





# Ridership

- Most voters are not transit riders



# Measure Language

- Two versions of ballot language for a half-cent sales tax were tested

## *Closure Prevention*

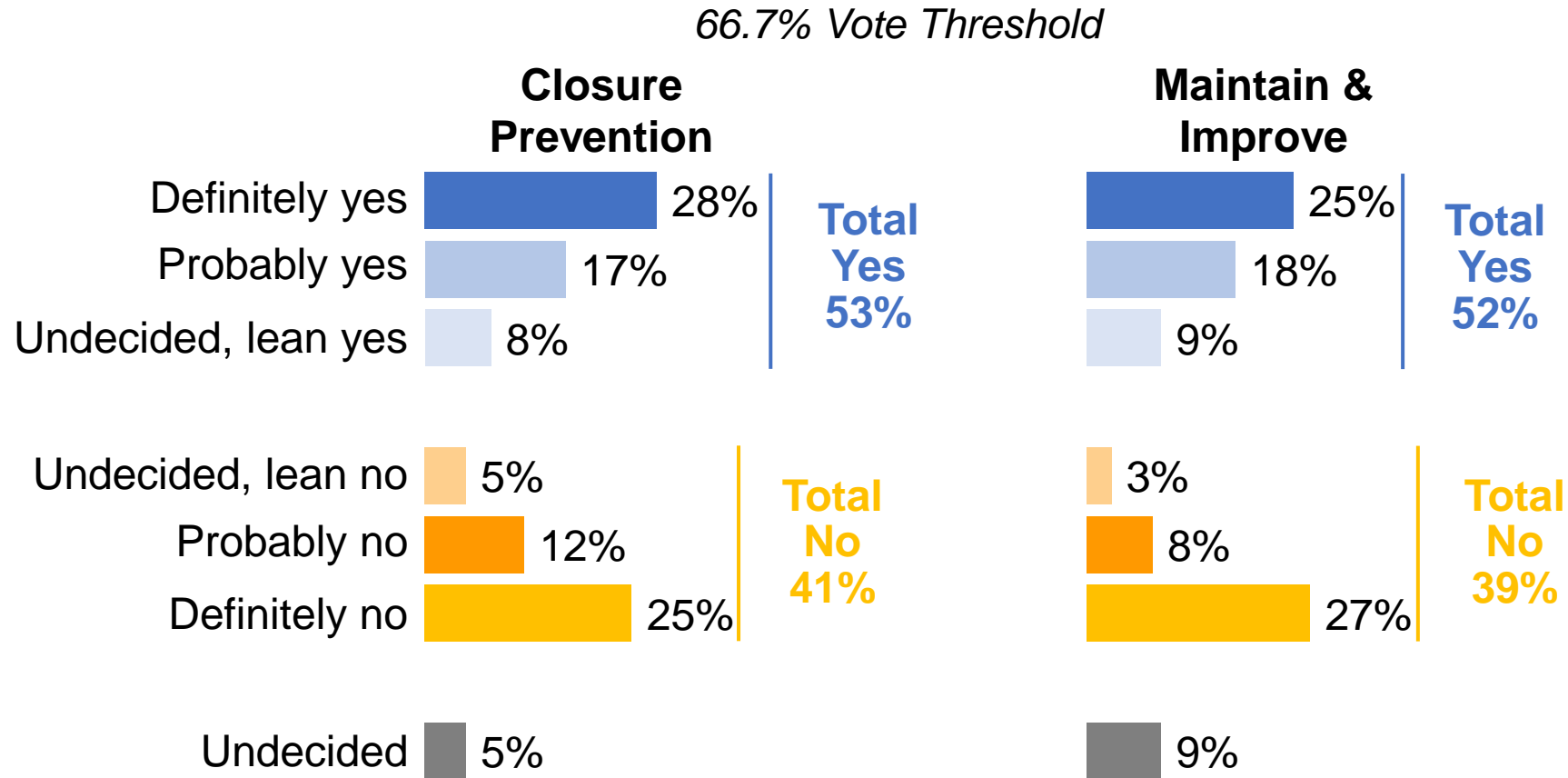
**Save Bay Area Transit Plan.** To keep BART and other Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara County transit systems from closing stations and stops, eliminating entire lines, and cancelling night/ weekend service; prevent increasing Bay Area traffic congestion; and continue making investments in safety, cleanliness, reliability, and regional coordination, shall the measure establishing a half-cent sales tax generating approximately \$920,000,000 annually until ended by voters — with independent audits, and public oversight and disclosure — be adopted?

## *Maintain & Improve*

**Bay Area Traffic Relief/Safety/Security/Reliability Measure.** To keep BART and other Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara County transit systems' trains, buses, stations, and stops clean and safe; relieve traffic congestion; improve system reliability and regional coordination; and continue providing critical transit options for seniors, students, low-income and disabled persons, shall the measure establishing a half-cent sales tax generating approximately \$920,000,000 annually until ended by voters — with independent audits, and public oversight and disclosure — be adopted?

# Initial support

- Both versions of a sales tax measure had similar support from slim majorities
- Support for a parcel tax raising a comparable amount of funding fell far short of a majority



Question: (Split A & Split B) Would you vote yes or no on this measure?

# Support after Positive and Negative Statements

- Support in the 2024 survey is similar to the last survey two years ago; it is notably lower than during the lead up to Measure RR

Survey Year	Initial Yes Vote	Yes Vote After Positives	Yes Vote After Negatives
<b>2013</b> (Initial Bond Survey)	<b>70%</b>	<b>76%</b>	<b>69%</b>
<b>2016</b> (Final Bond Survey before Placement of RR)*	<b>73%</b>	<b>77%</b>	<b>67%</b>
<b>2022</b> (Initial ½ Cent Sales Tax Survey – BART Counties)	<b>57%</b>	<b>59%</b>	<b>45%</b>
<b>2024</b> (Tracking ½ Cent Sales Tax Survey – BART Counties)**	<b>54%</b>	<b>57%</b>	<b>51%</b>

*\*Measure RR passed with a “yes” vote of 70.5%.*

*\*\*Results shown for the three BART District counties only, in order to be comparable with prior years.*



# January 2025 - Poll Survey Methodology

Likely November 2026 voters, conducted January 14-30, 2025

Multimodal: live telephone interviewing and email/text invitations to an online survey

Three-way split-sample methodology and available in English, Spanish, and Chinese

## 1A: 1/2 Cent Sales Tax - 4-County

(n=850, MoE  $\pm 3.4$ )

*To prevent increased traffic congestion; avoid major cuts to BART, Caltrain, AC Transit, Muni and other transit services; preserve transportation services for seniors/ persons with disabilities; address transit safety/ cleanliness; advance climate protection; reduce air pollution; prevent station closures; and maintain public transportation service for those who need it; shall the measure enacting a **1/2 cent sales tax for 10 years generating at least \$560,000,000 annually**, with required public audits and accountability/ transparency provisions, be adopted?*

## Hybrid: 1/2 Cent + Parcel Taxes - 9-County

(n=1,350, MoE  $\pm 2.7$ )

*To prevent increased traffic congestion; maintain BART, Caltrain, AC Transit, Muni, and other transit services; preserve transportation services for seniors/ persons with disabilities; address transit safety/ cleanliness; advance climate protection; reduce air pollution; repair potholes/ sidewalks; upgrade highways; and enhance bike access; shall the measure enacting a **1/2 cent sales tax and \$0.09 per building square-foot parcel tax for 30 years generating at least \$1,300,000,000 annually**, with required public audits and accountability/ transparency provisions, be adopted?*

## Variable: 1/2-7/8 Cent Sales Tax - 4-County

(n=850, MoE  $\pm 3.4$ )

*To prevent increased traffic congestion; maintain BART, Caltrain, AC Transit, Muni, and other transit services; preserve transportation services for seniors/ persons with disabilities; address transit safety and cleanliness; advance climate protection; reduce air pollution; and prevent station closures shall the measure enacting a **7/8 cent (San Francisco) and a 1/2 cent (Alameda, Contra Costa, San Mateo counties) sales tax for 11 years generating at least \$640,000,000 annually**, with required public audits and accountability/ transparency provisions, be adopted?*

# Key Findings

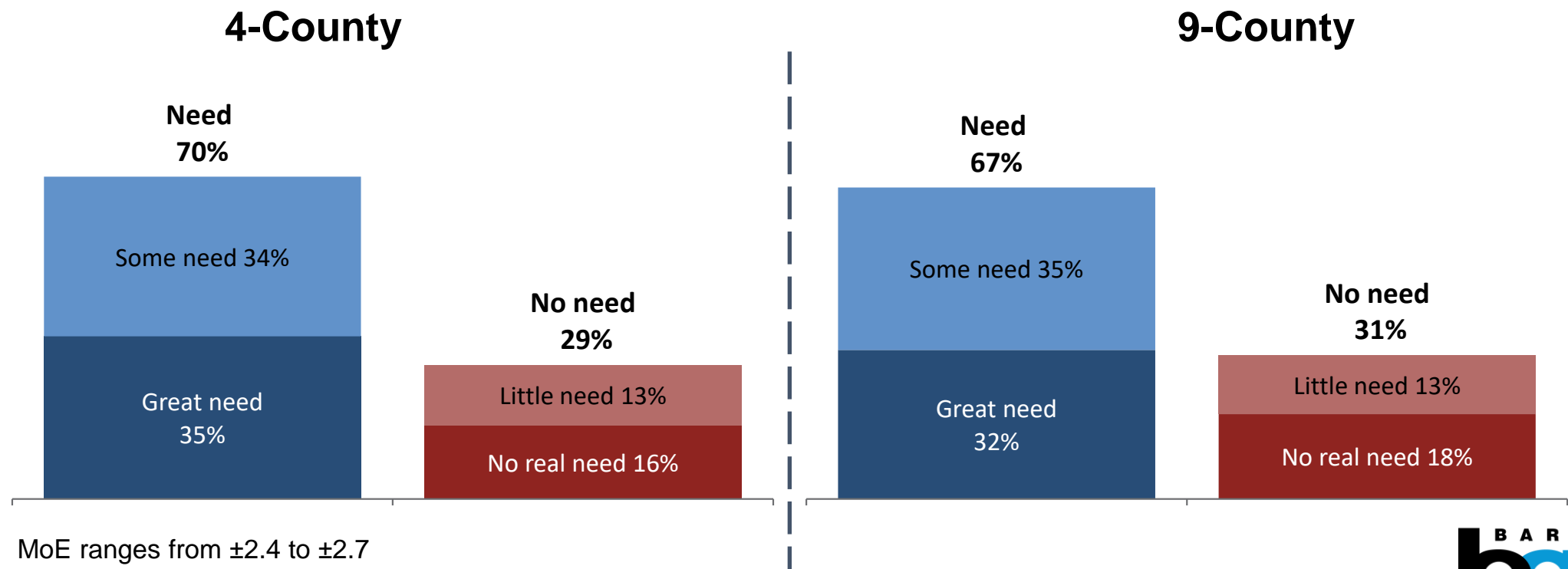
- **Overall mood** in the Bay Area is **improving** but affordability is still a widespread concern
- There is significant desire for transit and transportation **improvements**
- When thinking about transit, many mention **funding challenges** and **safety issues**. However, recent **improvements** are noted by many, especially in the Peninsula/South Bay
- Support for the 1A and Variable rate measures **exceeds a majority**, but falls far short of the two-thirds threshold, indicating the likely path for a transit measure would be via a citizen initiative
- The hybrid measure with two taxes has weaker support
- Overall framing and details of the measures **do little** to build support
- Although there is interest in **preventing cuts** to transit, voters are simply **hesitant to raise taxes** and **lack trust** that more money is the solution



# Need for Transit Funding

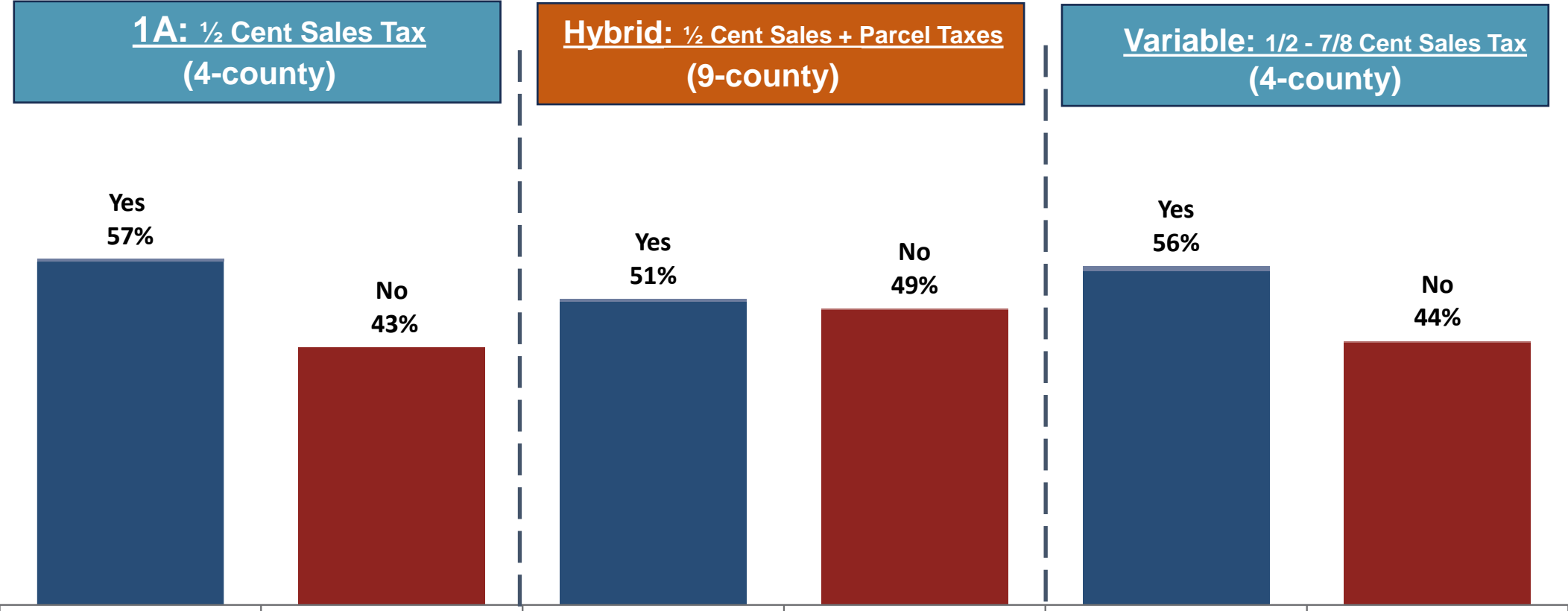
Awareness of funding needs is high, although not intense.

Would you say that public transit in the Bay Area has a great need for more money, some need for more money, little need for more money, or no real need for more money?



# Initial Vote

The measures start above a majority, but the 9-county two-tax Hybrid is weaker.



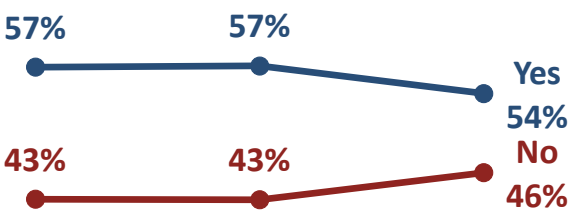
MoE ranges from ±2.7 to ±3.4



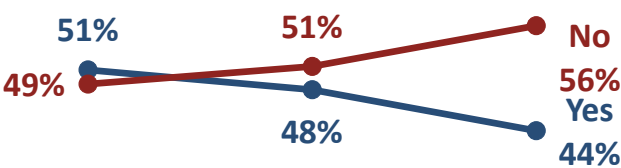
# Support Progression

Additional information through the survey does not build support for the measures.

1A  
(4-county)

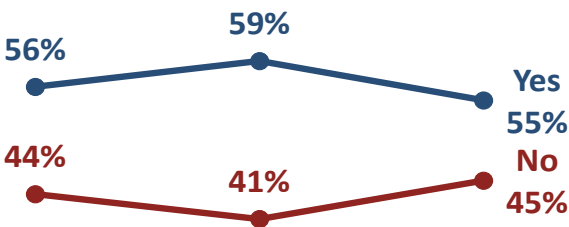


Hybrid  
(9-county)



Hybrid Yes vote progression (4-county):  
53%                      51%                      47%

Variable Rate  
(4-county)



Initial Vote    After Info    After Opp.

Initial Vote    After Info    After Opp.

Initial Vote    After Info    After Opp.



# Senate Bill 63 (Wiener, Arreguín) The Connect Bay Area Act



# Background on Regional Measure Efforts

- In the summer of 2024, the Metropolitan Transportation Commission (MTC) established an 18-member Transportation Revenue Measure Select Committee to help Bay Area leaders and stakeholders reach consensus on a potential 2026 transportation revenue measure
- A 20-member Transportation Revenue Measure Executive Group was also created to play an advisory role to the Select Committee. It consisted of representatives from the county transportation authorities and transit agencies, including BART
- The Select Committee and Executive Group met monthly from June to October to consider options and alternative for a measure that would meet the following goals:
  1. Generate enough revenue to address immediate operating shortfalls
  2. Introduce transformative changes to the region's transit network
  3. Gain the support of voters



# SB 63 (Wiener/Arreguín): The Connect Bay Area Act

- Introduced on January 9 and amended on March 25
- Authorizes a sales tax to be placed on the November 2026 ballot in the counties of Alameda, Contra Costa, and San Francisco
- San Mateo and Santa Clara counties may opt-in to the measure by July 31, 2025
- A default sales tax rate is set at ½-cent, with San Francisco authorized up to 1-cent
- The duration of the tax may be no less than 10 years and no longer than 15 years
- The exact rate and duration of the taxes shall be determined by July 31, 2025

# Revenue Measure Expenditures

- Includes intent language for regional transit operators (BART, Muni, Caltrain, and AC Transit) and applicable county transportation agencies to develop a plan that identifies target contributions from each county and informs the expenditure of revenues from the measure. This plan must be completed by July 31, 2025
- MTC shall distribute the revenues and up to 10% of funds will be allocated to rider-focused transit improvements
- Any remaining funds, shall be returned to counties to be used for local public transportation expenses

# Accountability Measures

- Upon passage of the measure, MTC shall engage in a third-party financial efficiency review of BART, Muni, Caltrain, and AC Transit to identify cost-saving efficiencies that, if implemented, would reduce one-time and ongoing costs for the operators
- As a condition of receiving ongoing funds, BART, Muni, Caltrain, and AC Transit must also comply with Regional Network Management (RNM) policies and programs adopted by MTC with the goal of increasing transit ridership and creating a seamless transit experience
- MTC shall submit a report to the Legislature on or before January 1, 2028, and annually thereafter on the progress of its transit transformation policies and the status of transit ridership in the region

# Senate Bill 63 Legislative Timeline

January 2025	February 2025	March 2025	April 2025	May 2025	June 2025	July 2025	Aug 2025	Sept 2025	Oct 2025
<b>Legislative Deadlines</b>									
<b>Jan. 24</b> Bill request deadline to Leg. Counsel	<b>Feb. 21</b> Bill intro deadline		<b>April 10 – 21</b> Spring Recess	<b>May 2</b> 1 <sup>st</sup> House Policy deadline  <b>May 23</b> 1 <sup>st</sup> House Appropriations deadline	<b>June 6</b> House of Origin deadline  <b>Gut &amp; Amend Period</b>	<b>July 18</b> 2 <sup>nd</sup> House Policy deadline  <b>July 18 – Aug 18</b> Summer Recess	<b>Aug 29</b> 2 <sup>nd</sup> House Appropriations deadline	<b>Sept. 5</b> Last day to Amend on Floor  <b>Sept. 12</b> Bills must pass Legislature	<b>Oct 12</b> Bills must be signed or vetoed
<b>SB 63 – The Connect Bay Area Act</b>									
<b>Jan 9</b> Bill introduced with intent language		<b>March 25</b> Substantive amendments introduced	Senate Policy Comm. Hearings	Senate Appropriations Hearing	Assembly Policy Comm. Hearings  <b>Senate Vote TBD</b>	<b>July 31 Deadline for:</b> County opt-ins County tax rates Measure duration T-FRIP completion	Assembly Appropriations Hearing	<b>Assembly vote and Senate concurrence if needed</b>	<b>Action by Governor</b>
<b>BART Activities</b>									
<b>Jan 23</b> Board update on SB 63 and MTC-led efforts	<b>Feb 4-5</b> Sacramento legislative visits  <b>Feb 27</b> Presentation on MTC polling at Board Workshop	<b>March 25</b> Participation at SB 63 Press Event	<b>April 10</b> SB 63 for Board action	<b>Board Update</b> (Date TBD)	<b>Board Update</b> (Date TBD)	<b>Board Update</b> (Date TBD)	<b>Board Update</b> (Date TBD)	<b>Board Update</b> (Date TBD)	
<b>April – August</b> Engagement in committee hearings and additional member meetings Involvement in negotiations regarding T-TRIP Continued input provided to authors on amendments									

# Q&A





## 5.A.3. Capital Program Overview

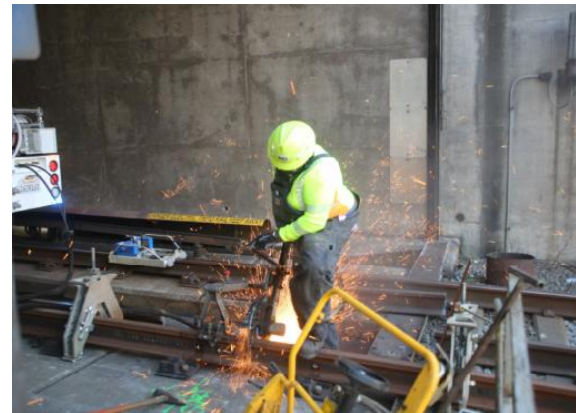


# Strategic Investments to Improve Customer Experience



# Foundations of BART's Capital Program

- **Every Capital Investment is an Improvement to the Customer Experience**
  - Safety and security
  - Accessibility and ease of use
  - Quality experience
  - Service reliability and longevity
- **Defining BART's Capital Program**
  - A series of projects spanning multiple years
  - Adds, replaces or renovates capital assets
  - Planned and potential investments
  - Meets BART goals and objectives
- **Capital Program Drivers**
  - Asset management and Reliability Centered Maintenance (RCM)
  - Project prioritization and funding strategies



# Data Drives Decisions



Asset Data Sources



Capital Needs Factors



Operational Decisions



Service Reliability



Rider Feedback



Physical Constraints



Logistical Limitations



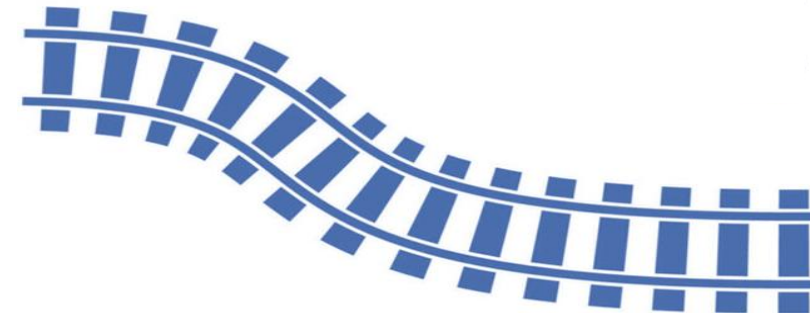
Funding Opportunities



Emerging Technology



## Capital Investment Plan



**Safe, Clean,  
Reliable Transit**



# Key Capital Investments





# Safety & Security



**Cameras**

- Trains, platforms, parking lots, stations, elevators, fence lines, substations, yards
- Vital strategy for Crime Prevention Through Environmental Design (CPTED)
- Improves perception and accountability



**Fire Alarms**

- Stations, facilities, yards, and administration buildings
- End of life, manufacturer standards, malfunction or failure
- Building code & technology changes, expiration of system components



**Station Hardening**

- Next Generation Fare Gates, surrounding barriers, and artistic influences
- Passenger safety and minimize fare evasion
- Graffiti abatement and improving station appearance



**Lighting Program**

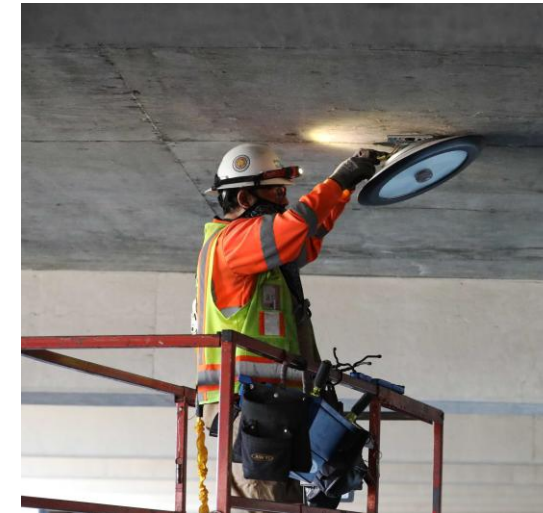
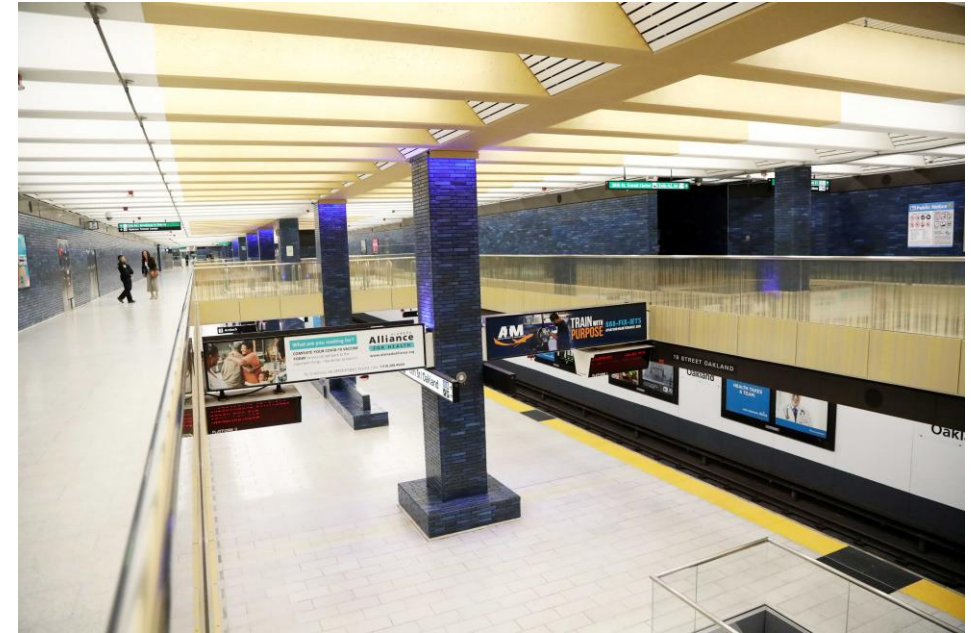
- Platforms, parking lots, stations, escalators, fence lines, substations, yards
- Enhance station and employee environments ensuring they are safe, clean and inviting
- Sustainable, cost saving, and minimizes future maintenance

# Safety & Security

## Lighting Program

- Pivotal factor in Crime Prevention Through Environmental Design (CPTED)
- Platforms, stairways, elevators, pedestrian pathways, maintenance work areas, concourse, parking areas, etc.
- Leveraging a synergistic collaboration between BART forces and service providers:
  - Allows opportunities for greater success and a brighter future
  - BART forces principally working in the trackway
  - Three service providers working in five zones of five Bay Area counties

***Minimal investment yields substantial benefits***





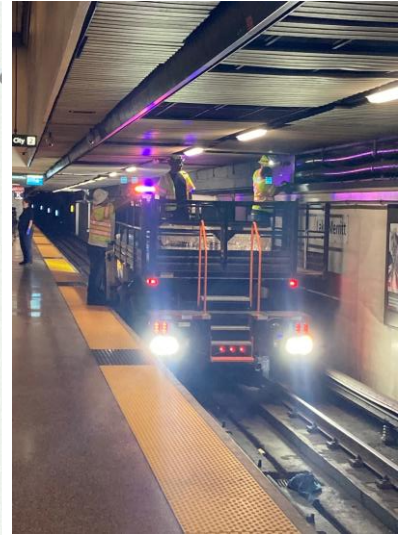
# Safety & Security

- **Lighting Program Priorities**
- Repair, replace, or upgrade
- Based on safety and field observation, location, maintenance data, and brightness level
- Materials, labor, services, contracts, tools and equipment
- Remote monitoring and remote control
- Next priorities (in progress):
  - Embarcadero platform
  - 12th St lighting upgrade
  - West Oakland parking lot
  - Rockridge parking lot
  - Downtown Berkeley



## Lighting Program Activities

- Completed (May 2024 – Jan 2025)
- Expected Completion in 2025





# Safety & Security

## Lighting Program Improvements

*A Picture Is Worth A Thousand Words*

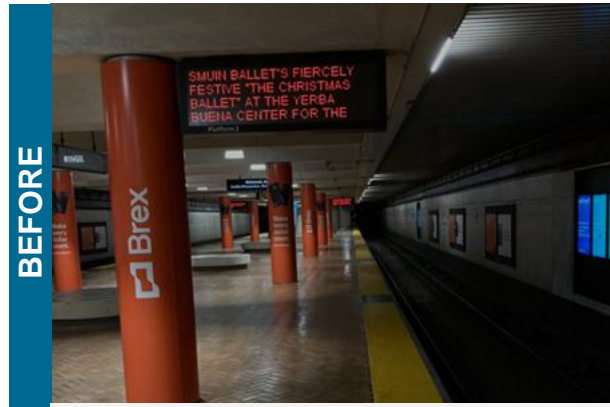


BEFORE

West Oakland Parking Lot



AFTER



BEFORE

Montgomery Platform

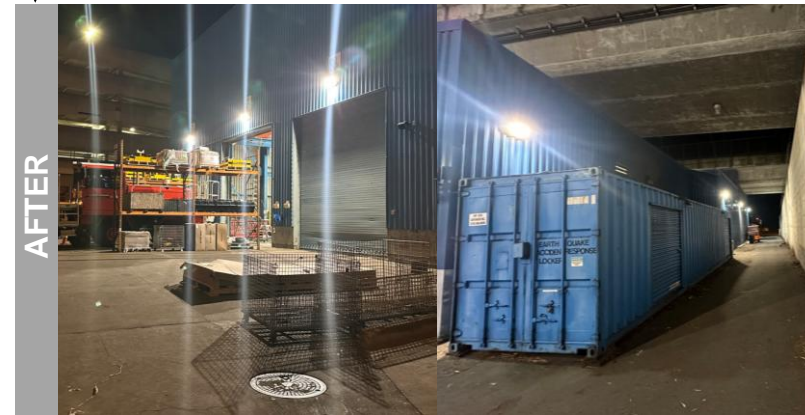


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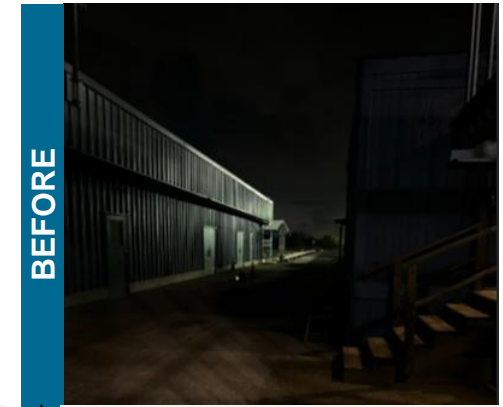


BEFORE

Daly City Yard

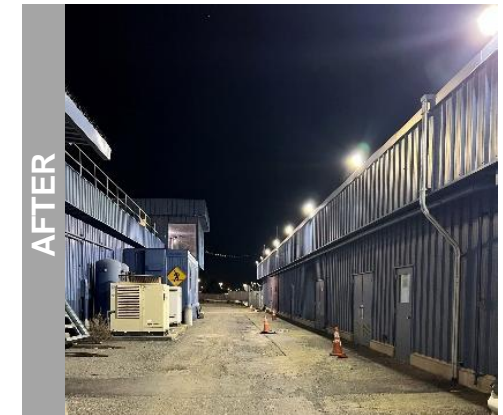


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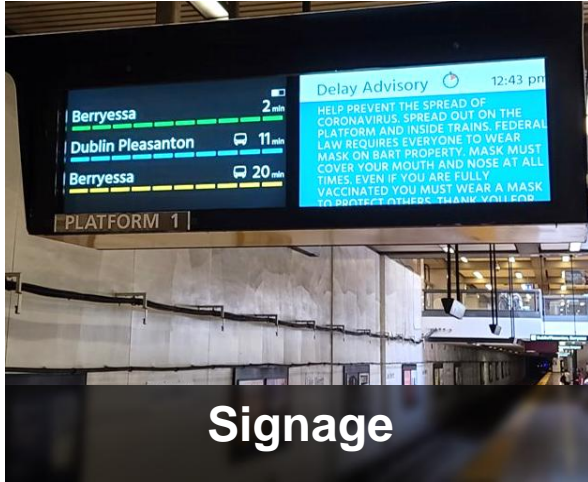
BEFORE

Hayward Yard



AFTER

# Accessibility & Ease of Use



**Signage**

- Modernize outdated legacy signage to improve clarity, visibility, accessibility, and rider safety
- Reduce written messages, using more pictograms, graphic symbols and operator logos
- Install Digital Destination Signs (DSS) on station platforms



**Public Address System**

- Update equipment for improvements in sound quality and speech intelligibility
- Phase 1 funded for pilot design and construction at Powell and Lafayette stations
- Phase 2 funded for design at Castro Valley and Ashby stations



**Elevators**

- Increased reliability and minimized downtime
- Exceeded goal for station elevator availability (98%) for last 14 quarters
- Average number of days between unplanned service interruptions increases to 50 days after modernization



**Escalators**

- Replace, renovate, and repair aging escalators
- Technology and lighting improvements
- Environmentally friendly/ reduces energy use
- Decreased maintenance and increased reliability

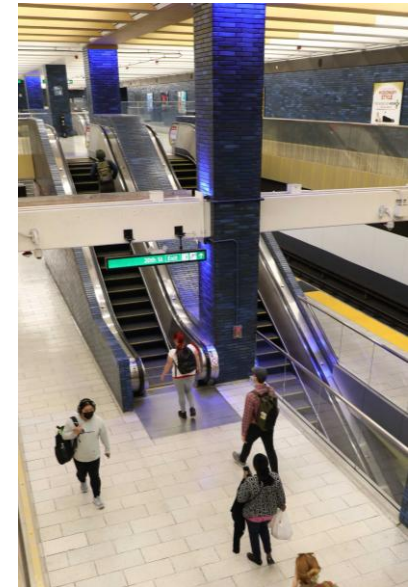
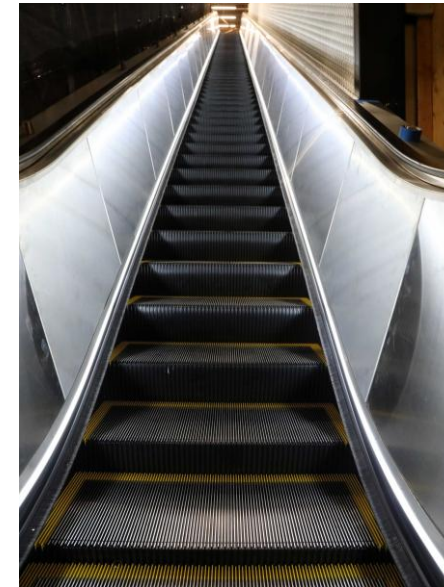
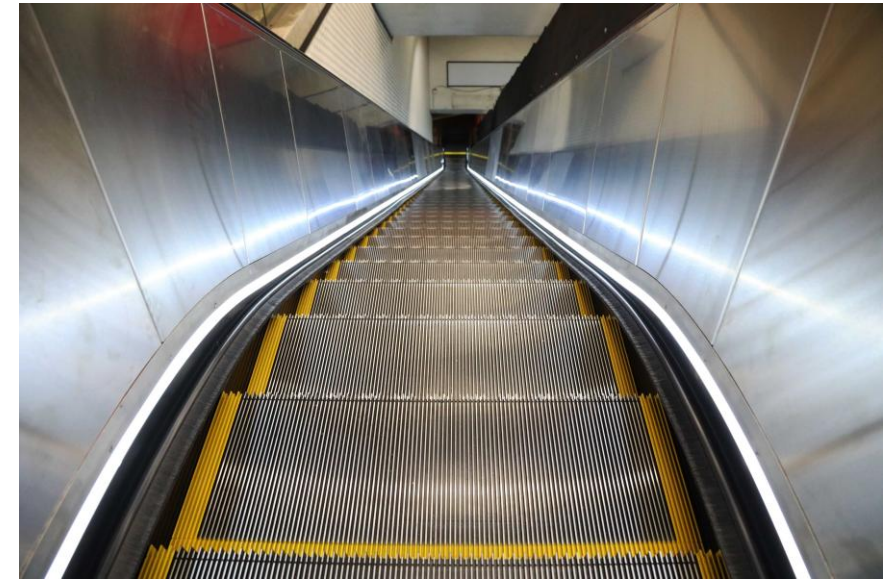




# Accessibility & Ease of Use

## Escalators

- Tougher but lighter design
- More energy efficient and environmentally friendly
- Increased reliability with shorter downtime
  - 2024 Street Escalator Availability: Goal met for 7 quarters
  - 2024 Platform Escalators Availability: Goal met for 14 quarters
  - Equipment preservation in the contract
- Brighter/newer lighting system
- Bought and built in the U.S.A.

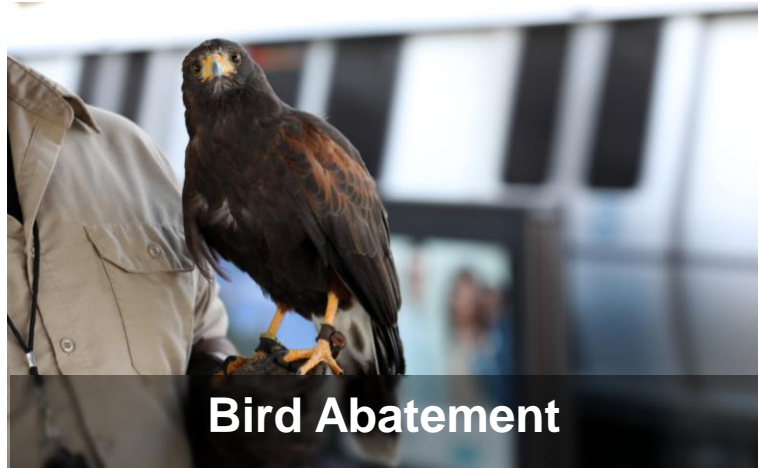


# Quality Experience



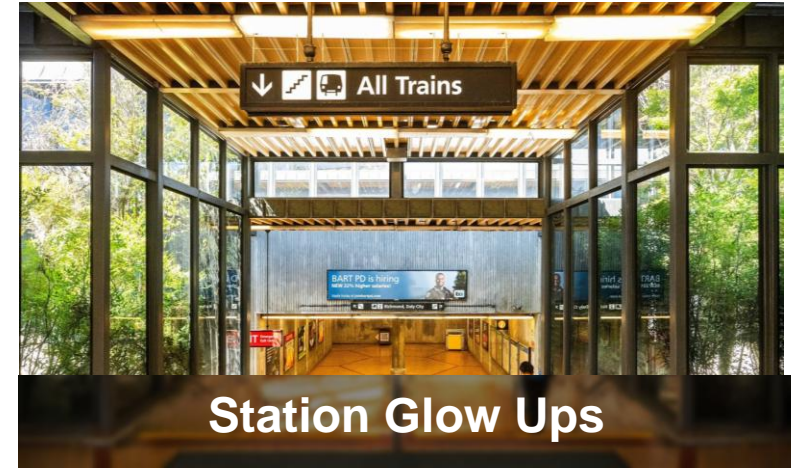
**Canopies**

- Provides additional layers of station security, cleanliness, weather protection and inviting characteristics
- Protects escalators from wear-and-tear
- Includes real-time digital train arrival display
- Meets code requirements
- 21 canopies to be installed in Downtown San Francisco by 2027



**Bird Abatement**

- Mitigate pigeon populations at stations with hostile-free approaches
- Flock Free: electromagnetic pulse that disrupts birds' navigational senses and momentarily prevents them from landing (Install completed in San Leandro)
- Falcon Force: abatement strategy using the presence of hawks to territorialize stations and discourage pigeon loitering



**Station Glow Ups**

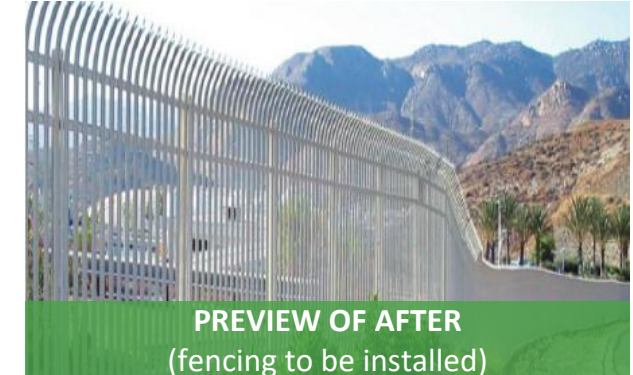
- Preservation of station appearance and minimization of maintenance (painting, power washing, etc.,)
- Installation of fencing and Next Generation Fare Gates
- Water intrusion efforts
- Decluttering: removal of old bike racks, phone booths, etc.,



# Quality Experience

## Hayward Station Glow Up

- Improve appearance of station exterior
- Improve security and access control for garage lot perimeter and station
- Mitigate water intrusion within paid area near fare gates and Station Agent booth



“Flock Free”





# Service Reliability & Longevity



- Increased flexibility in adjustment of speeds and braking, improving reliability and safe train spacing
- Requires work on the trackway, in the trains, at Operations Control Center (OCC) and the train control room
- Benefits: smoother ride, service frequency, flexibility, new technology and sustainability



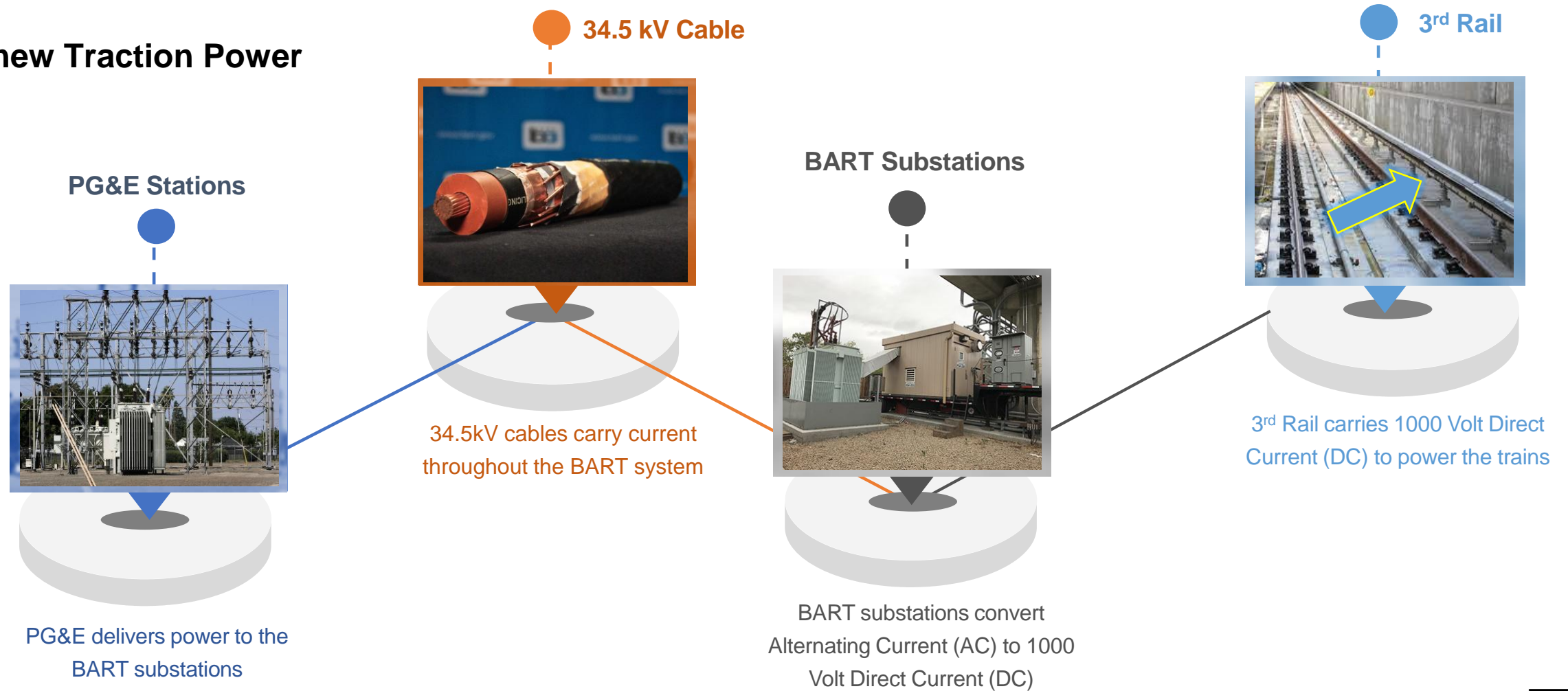
- Aged rail and defects, including, corrugations, corrosion and spalling
- Rail relay, surfacing, tie renewals, destressing, welding
- Replacements result in noise reduction, less maintenance, decreases potential anomalies and improves rail safety



- High Voltage Power Distribution System, which includes traction power substations, 34.5 kV cables, etc.,
- Redundancy built in. Three cables on each side along the trackway (~5M feet) with multiple PG&E connections
- Renovations increased Megawatts by ~ 150% at each renovated site

# Service Reliability & Longevity

## Renew Traction Power



88% of BART's electricity was from greenhouse-gas free sources (CY2023)  
[bart.gov/sustainability/energy-procurement](https://bart.gov/sustainability/energy-procurement)



# Service Reliability & Longevity

## Renew Traction Power Substations

### Repair and Improvements: 5 Year Outlook



- Substations Completed or Currently In-Repair
- Upcoming (New Substation or Substation Renovation)
- ▲ Substation Incidents over Summer 2024 (Issues/Failures)



#### REPAIRS

KTT (~19 <sup>th</sup> St Station)	Completed 2025
ANA (~Lake Merritt)	Substantial Completion 2025

#### RENOVATIONS

KTE (Bay Tube East)	Substantial Completion 2025
CWC (Walnut Creek)	Substantial Completion 2026
MPS (Powell)	Issue for Bid 2026-2027
MTW (Embarcadero)	

#### NEW

KTF (Oakland)	Issue for Bid 2025
RPA (Richmond)	
CMR (Concord)	
MCC (Civic Center)	Substantial Completion Late-2024
MMS (Montgomery)	Substantial Completion 2025
Portable Substations	(4) Delivery 2025

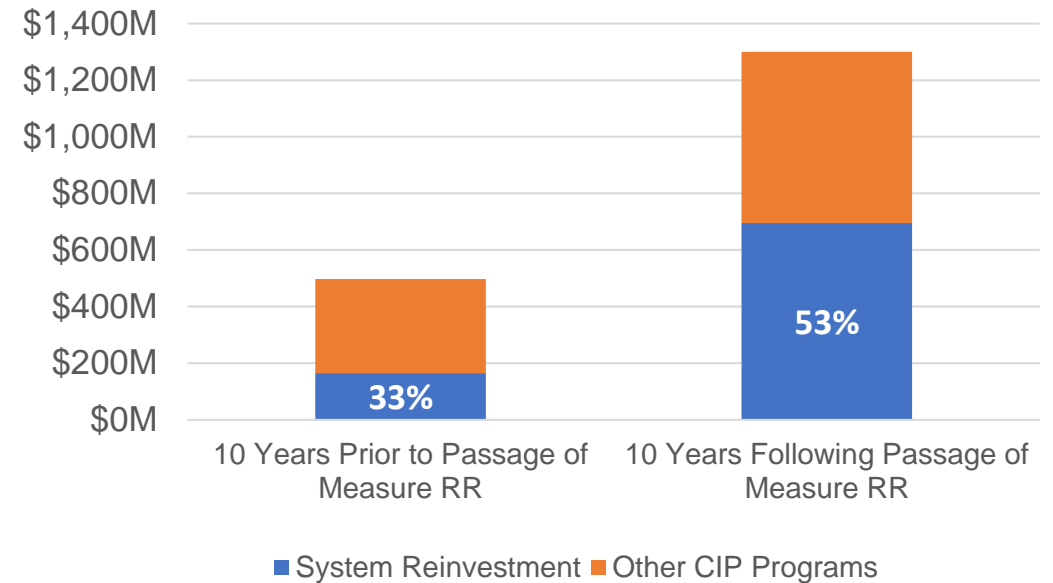


# Maximizing our Investment

- Capital costs have significantly increased (40% between 2019 and 2024<sup>1</sup>) due to inflation and increase in labor and materials costs
- System reinvestment – investment in asset renewal – has increased 4.2x since passage of Measure RR
- Aging BART system requires higher investment in renovation, replacement and maintenance of existing infrastructure
- Leveraged Measure RR to secure billions of federal, state and regional funding for Core Capacity Program

<sup>1</sup> Source: California Construction Cost index CCCI

Average Capital Budget



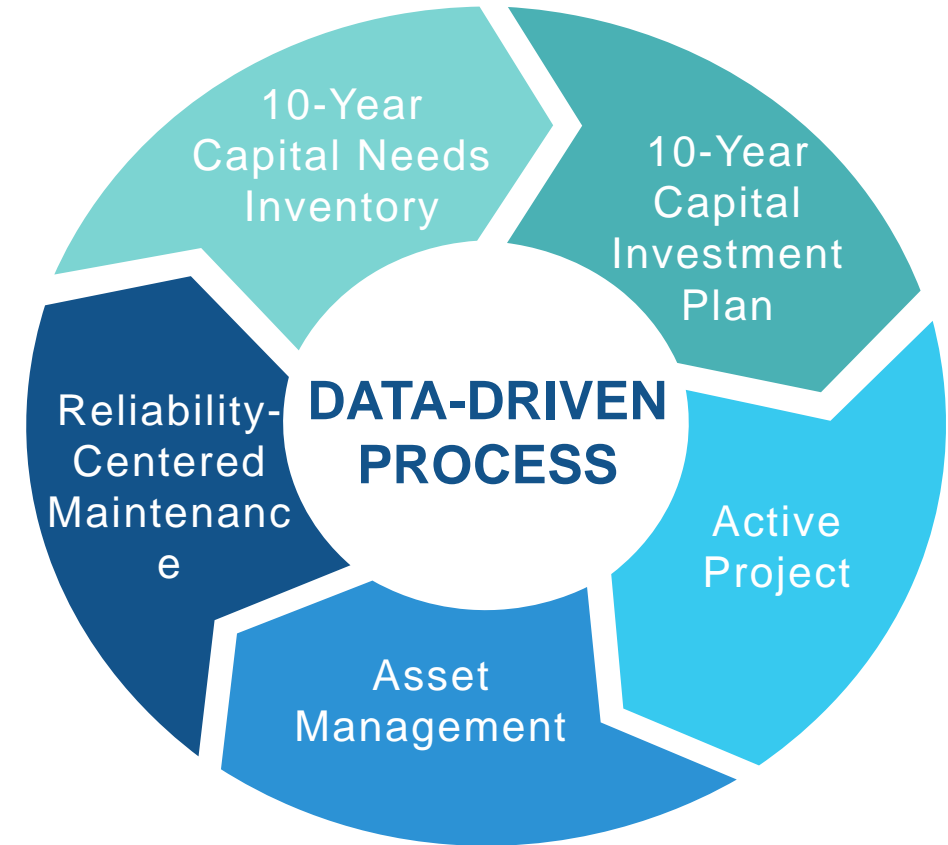
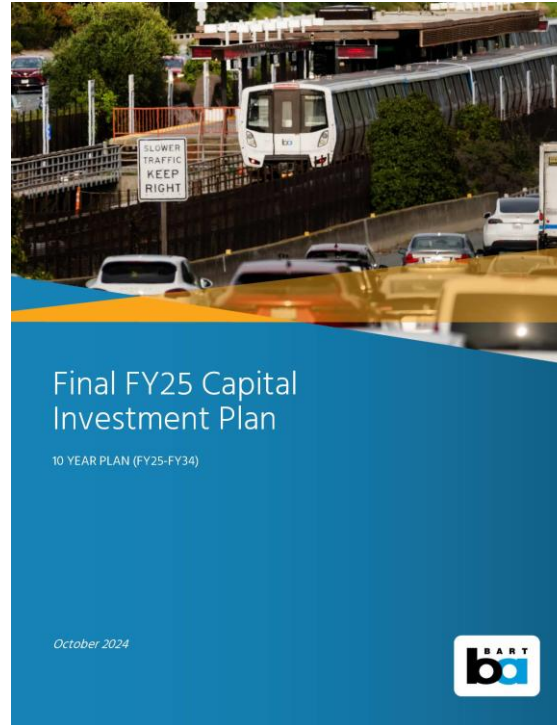
# Capital Funding Picture and Investment Plan



# Capital Investment Plan

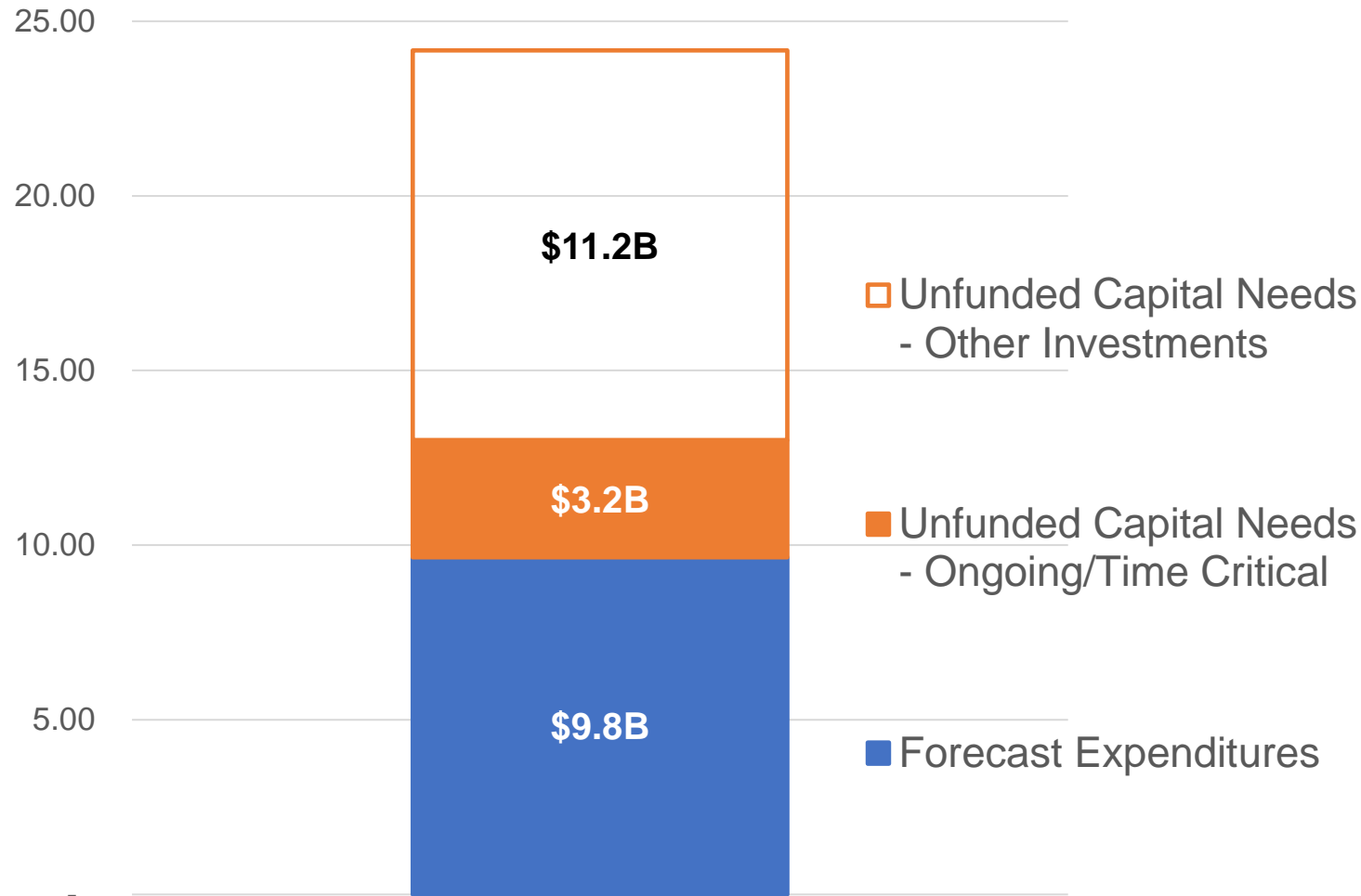
## CIP Guiding Principles

- Customer experience is primary focus
- Targeted resiliency, capacity and sustainability investments
- Optimize and responsibly manage capital funding
- Snapshot in time balances existing commitments, emergent needs and funding strategy



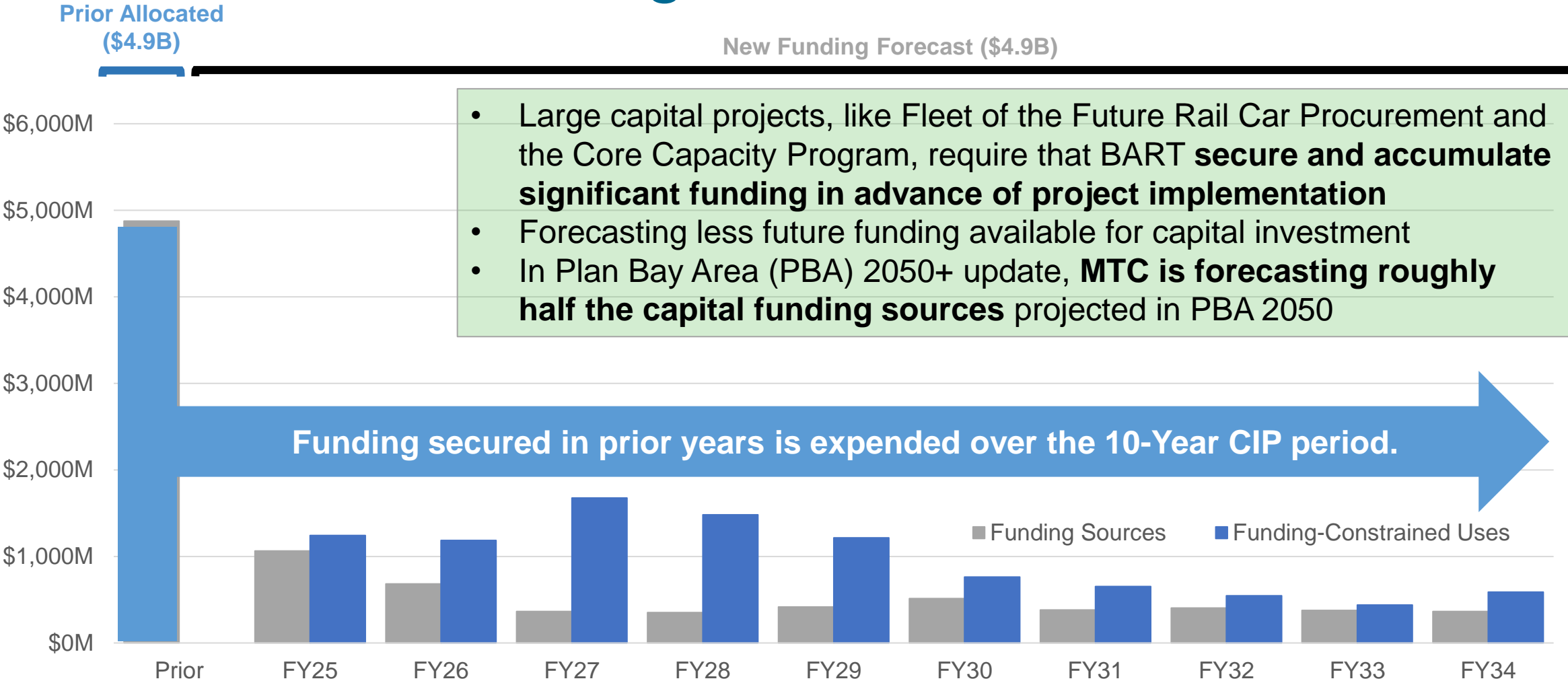
*FY25 Capital Investment Plan can be found on [www.bart.gov](http://www.bart.gov)*

# Capital Program Funding Challenges



- Constrained CIP = **\$9.8B over 10 years**
- CIP constrained by funding and system access capacity

# FY25-34 CIP: Funding Sources & Uses Forecast



- Large capital projects, like Fleet of the Future Rail Car Procurement and the Core Capacity Program, require that BART **secure and accumulate significant funding in advance of project implementation**
- Forecasting less future funding available for capital investment
- In Plan Bay Area (PBA) 2050+ update, **MTC is forecasting roughly half the capital funding sources** projected in PBA 2050

Note: The chart presents the year in which sources are secured and become available, not necessarily the year in which these funds are expended



# Capital Program Major Funding Need Highlights

## Core Capacity Program (4 Project Elements)

~\$4.7-5.1B program cost, ~\$4.4B secured funding

Existing commitments to multiple funding partners to deliver program benefits and four project elements:

- Replacement of legacy fixed-block train control system with modern communications-based train control system (fully funded)
- Procurement of 306 Fleet of the Future rail cars (fully funded)
- Construction of East Storage Yard at Hayward Maintenance Complex (HMC2) to store additional rail cars (partially funded)
- Construction of six additional Traction Power Substations (TPSS); five TPSS fully funded; one unfunded, part of HMC2

## Traction Power Renewal

~\$1.9B program cost, ~\$1.1B secured funding

Replace, renovate and upgrade power infrastructure, including substations and cables, to maintain and improve service reliability

- Constrained CIP allocates a significant share of forecast future funding to traction power

## Elevator Modernization Program

~\$350M program cost, ~\$93M secured funding

Commitment under Disability Rights Advocates (DRA) lawsuit settlement to pursue funding to modernize elevators to improve reliability, maintainability and availability for riders who need them

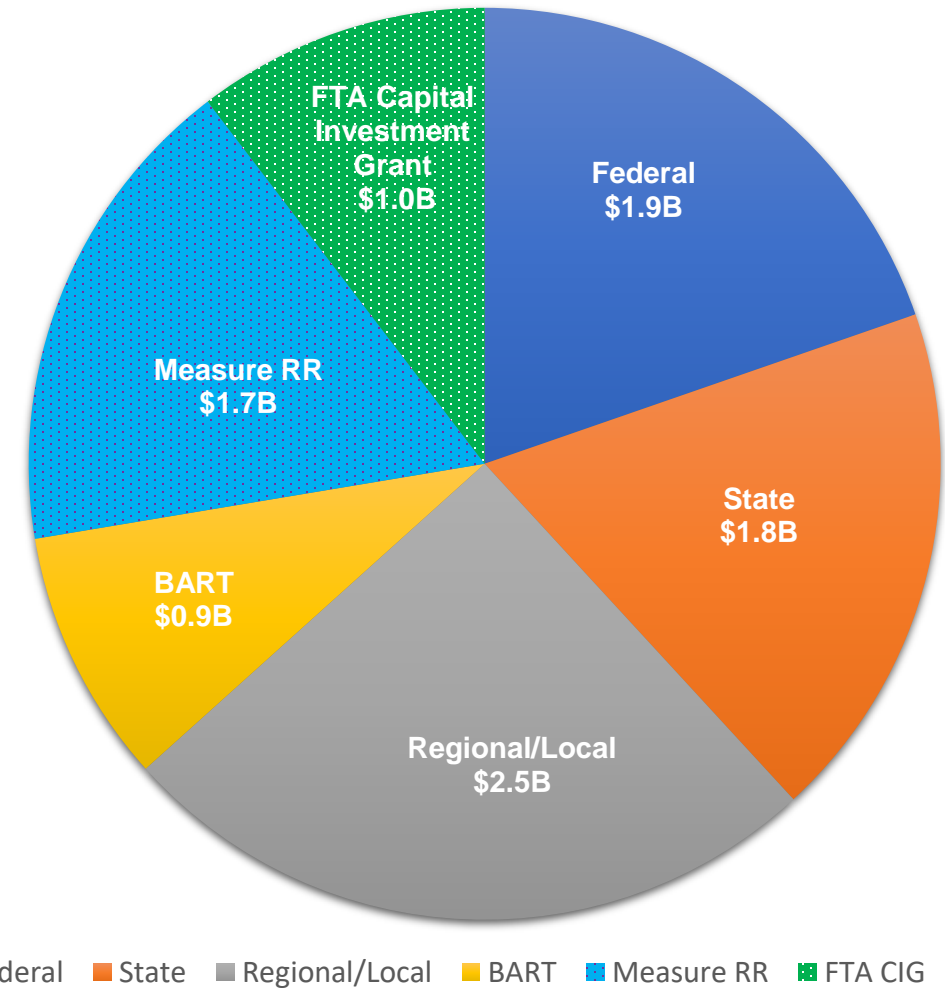
## Fleet of the Future Maintenance Facility

~\$450-500M cost, ~\$50M secured funding

Construction of a new maintenance facility needed to implement Strategic Maintenance Program effectively

# Capital Fund Sources over 10-Year CIP Period

- Capital Investment Grant and Measure RR will be fully expended during CIP period
- Operating budget outlook impacts capital funding and financing options
- Federal funding uncertainty
- Grant funds are not fungible
  - Cannot use capital grants for operating
  - Grant awards for specific projects
  - Map capital needs to grant opportunities based on eligibility and evaluation criteria, requirements and constraints



■ Federal ■ State ■ Regional/Local ■ BART ■ Measure RR ■ FTA CIG





# Capital Program Funding Advocacy

- Advocating at regional, state and federal levels for increased funding for State of Good Repair (SOGR) capital investments
- Preparing for Infrastructure Investment & Jobs Act (IIJA) Reauthorization efforts
  - State's IIJA Reauthorization working group
- State and federal member requests (i.e. earmarks) – generally ~\$1-3M each
- Developing federal advocacy strategies:
  - To fund capital investments at airport transit stations
  - To fund construction of new and renovation of existing transit maintenance facilities, shops and yards





# Building on Capital Delivery Strategies



# Navigating the Future

## New Lens

- Elevators
- Traction power system
- Intrusion deterrent – platform barriers

## Looking Ahead by Looking Back

- Garage lighting (offset installment in PG&E agreement)
- Fleet of the Future (overhaul schedule in contract)
- Station glow ups (asset-based versus full modernization)
- Track work (advantageous shut-downs)



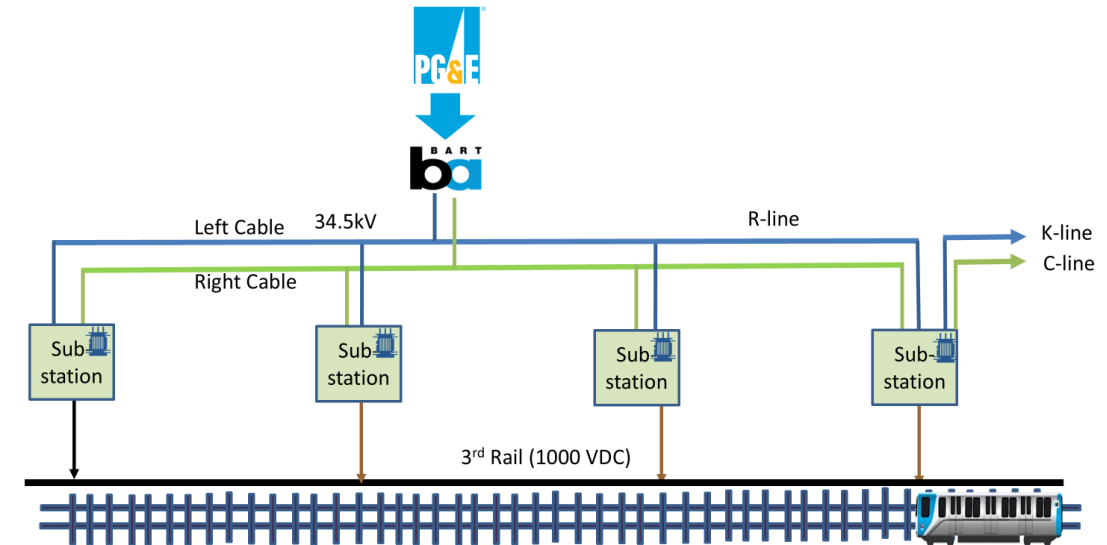
# Elevators

- Street, platform, parking structures, wheelchair lifts
- Modernization anywhere from full replacement to updating critical components – tank, doors, door sills, hydraulic pistons
- Economy of scale to attract competition (current funding stream is a trickle)
- Pre modernization requires service every 13 days (~10 FTE / year); post modernization > 50 days
- According to the Public Policy Institute of California, by 2040, the population over 65 will increase by 59%



# Traction Power System

- Traction power is a power distribution “system”
  - Substations
  - Cables
  - Switching stations
  - Portable substations
- Thoughtful planning will amplify the impact of each single renovation on our overall system
  - Greater capacity and efficiency units
  - Alternative distribution systems
  - Novel energy storage
  - Strategic prioritization and selection

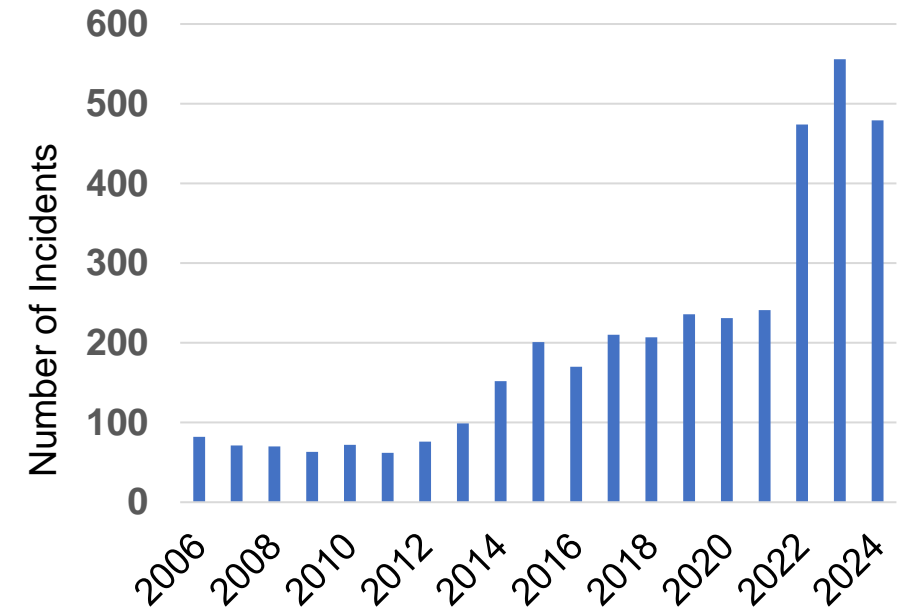




# Intrusion Deterrent – Platform Barriers

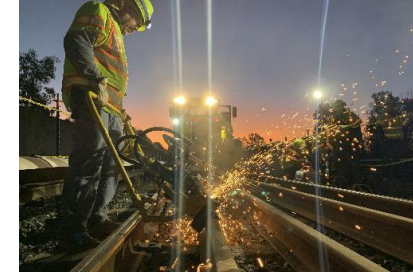
- Physical barriers between trainways and active platforms to address rider safety, and minimize the migration of smoke during emergency situations
- No current funding, only seed funding to begin a study
- Moving forward:
  - Research, studies, Request for Expression of Interest (RFEI)
  - Determine system readiness
  - Industry review/standards
  - Advancement in technologies
  - Cost estimate / funding need

*Intrusion Data by Calendar Year*



# Capitalizing on our Investments

- The future of how we do capital projects already started
- Ensuring future BART the best opportunities for success is built on leveraging:
  - Past experiences
  - Innovations in technology
  - Industry engagement and leading practices
  - Strategic funding approaches
  - Alternative contracting mechanisms
  - Available wrench time
- Innovation in how we fund, how we do the work, who we do the work with, and what work we perform



***Every capital investment improves the customer experience***



# Q&A







# 5.B. Measure RR BART Safety, Reliability and Traffic Relief Program Appendix

Bond Oversight Committee | April 18, 2025



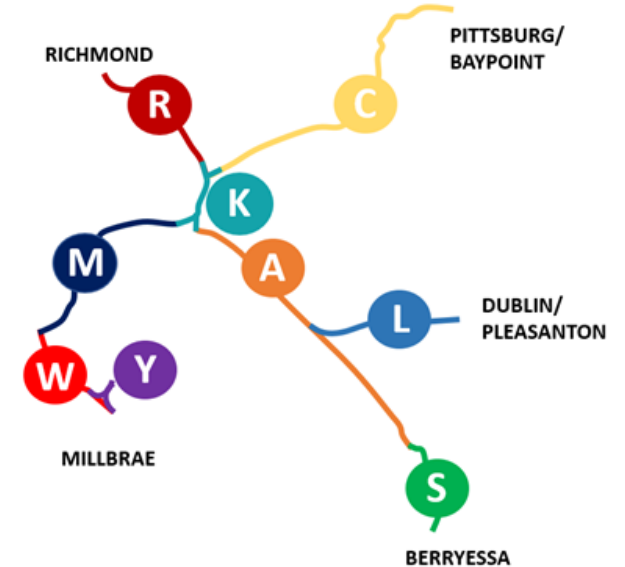


# Bond Oversight Committee Duties & Responsibilities

- Provide diligent, independent and public oversight over the expenditure of funds from the sale of District general obligation bonds.
- Assess how bond proceeds are invested to ensure that all spending is authorized by the ballot measure.
- Assess whether projects funded by bond proceeds are completed in a timely, cost-effective and quality manner consistent with the best interest of BART riders and District residents.
- Publish an annual report that includes a detailed account of the Committee's activities including its expenditures.

# Executive Summary

- Through December 2024, \$1.95B of the Measure RR funds have been invested to complete 66%\* of the work.
- Successes
  - Completion of Construction for the following:
    - Civic Center Substation
    - Canopies at Montgomery Street Station and Civic Center Station
    - Escalators at Embarcadero and Montgomery Street Station
    - Hayward Maintenance Complex Phase 2 (HMC2) Civil Grading Contract



# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
10 (+2)	26 (0)	12 (-3)	56 (+3)	65 (+3)	169 (+5)

+ (Projects added in the phase)  
 - (Projects no longer in the phase)

\*To be updated in next quarter's report



# 5.B.1. Appendix: Cashflow and Revenue



# Measure RR Cashflow (\$ Millions): Long-Term Outlook

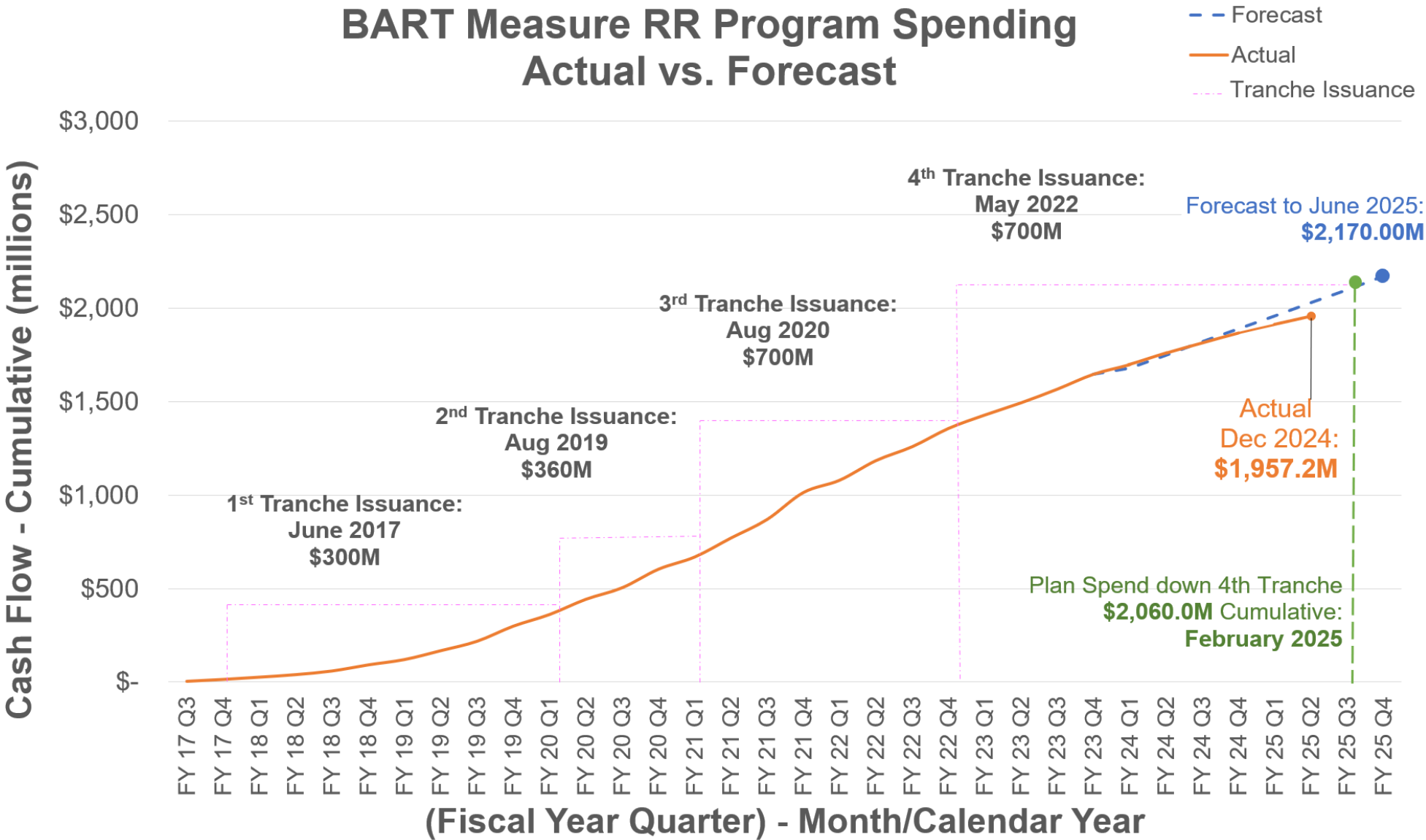
Program	Expended (thru September 2024)	Expended (thru December 2024)	Period Cashflow (Oct 2024 – December 2024)	% Expended out of Total Bond Investment	Long Term Expenditure
Renew Track	\$439.1	\$446.0	\$6.9	71%	\$625
Renew Power Infrastructure	\$763.1	\$773.2	\$10.1	63%	\$1,225
Repair Tunnels & Structures	\$264.1	\$268.7	\$4.6	49%	\$549
Renew Mechanical	\$91.2	\$92.9	\$1.7	60%	\$156
Replace Train Control/Increase Capacity	\$56.6	\$64.9	\$8.3	16%	\$400
Renew Stations	\$89.3	\$96.1	\$6.8	46%	\$210
Expand Safe Access to Stations	\$46.5	\$51.6	\$5.1	38%	\$135
Design/Engineer to Relieve Crowding*	\$161.8	\$163.8	\$2.0	82%	\$200
<b>Total</b>	<b>\$1,911.7</b>	<b>\$1,957.2</b>	<b>\$45.5</b>	<b>56%</b>	<b>\$3,500</b>

\*Full Title: Design and Engineer Future Projects to Relieve Crowding, Increase System Redundancy, and Reduce Traffic Congestion



# Management of Revenue and Spending

## BART Measure RR Program Spending Actual vs. Forecast



## 5.B.2. Appendix: Financial Outlook, Program Status & Milestones





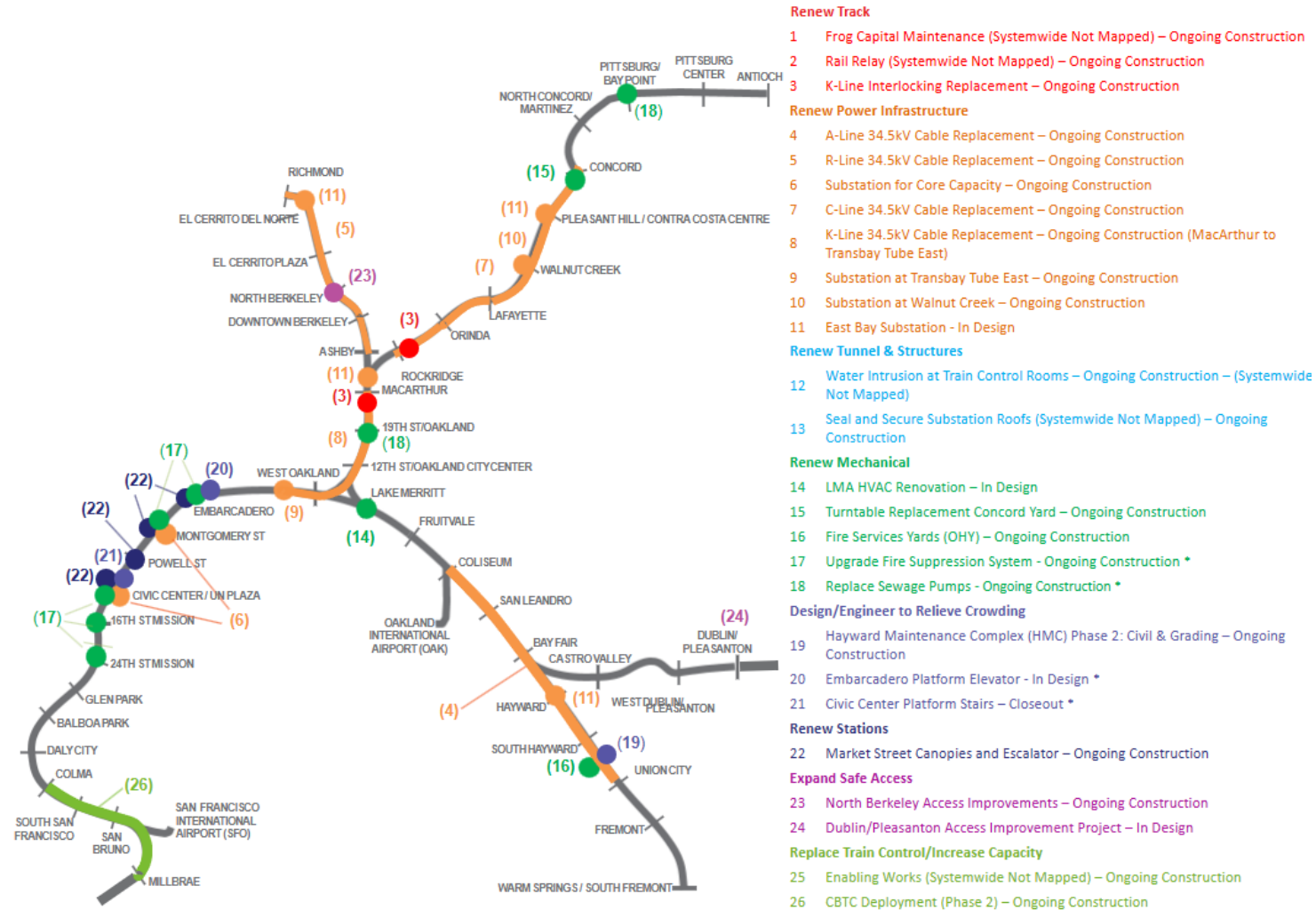
# Work Progress Since Last Meeting



# Examples of Active RR Projects (Oct - Dec 2024)

## Measure RR – Project Progress

### \*Updated Projects



# Individual Program Milestones

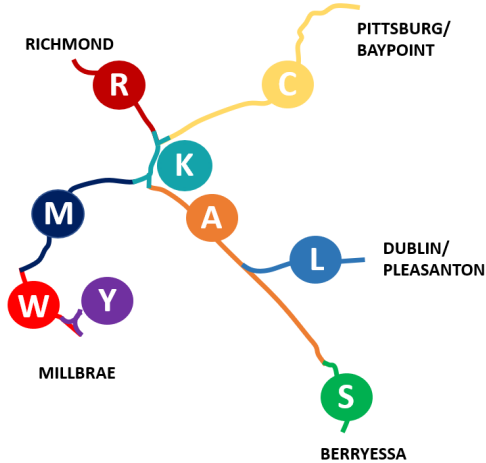


# Renew Track

## STATUS & MILESTONES

EXPENDED Thru 12/2024: \$446  
TOTAL PROGRAM VALUE: \$625  
PERIOD CASHFLOW: \$6.9

All dollar values are in millions



### STATUS – Renew Track

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
1	0	1	9	11	22

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Began Closeout for Oakland Yard Tracks</li></ul>		<ul style="list-style-type: none"><li><i>Completion of Construction for Switch Point Replacement for Hayward and Concord Yards</i></li><li><i>Completion of Construction for A77 Interlocking</i></li></ul>	<ul style="list-style-type: none"><li><i>Advertise to Bid Direct Fixation Fasteners Material Procurement Contract</i></li></ul>

### Watchlist:

- Significant number of Weekend Shutdowns and Bus Bridges
- K-Line Project Reschedule

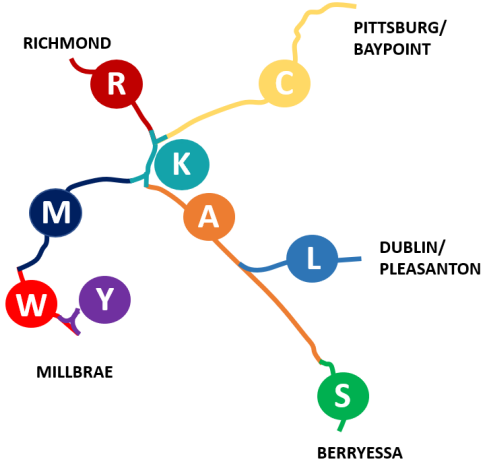
*Italic: Newly added and modified milestones from previous report.*



# Renew Power

## STATUS & MILESTONES

EXPENDED Thru 12/2024: \$773.2  
TOTAL PROGRAM VALUE: \$1,225  
PERIOD CASHFLOW: \$10.1  
*All dollar values are in millions*



### STATUS – Renew Power Infrastructure

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
1	7	2	18	7	35

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Completed Construction for Civic Center Substation (MCC)</li><li>Completed Contract Closeout for 34.5kV Cable Replacement from El Cerrito Plaza Substation (RCP) to Richmond Yard Substation (RRY)</li></ul>	<ul style="list-style-type: none"><li>Substantial Completion for 34.5kV Cable replacement and Fiber Optic Installation between Union City Substation (AUC) and Coliseum Substation (ACO)</li></ul>	<ul style="list-style-type: none"><li>Completion of Construction of Montgomery Street Substation (MMS)</li><li>Issue for Bid Station Fire Alarm Replacement Phase 4</li><li>Completion of Construction of SFTS Transformer/Bus Upgrade</li><li>Completion of Construction for Oakland Transition Structure (KTE) Traction Power Substation Replacement</li><li>Issue for Bid MET-G Generator Replacement Project</li></ul>	<ul style="list-style-type: none"><li>Completion of 34.5kV Raceway Construction from Orinda (COR) to Acalanes Road (CAR)</li><li>Substantial Completion for Traction Power Portable Substations</li><li>Completion of Construction for Battery Replacement for Train Control Rooms Phase 2</li></ul>

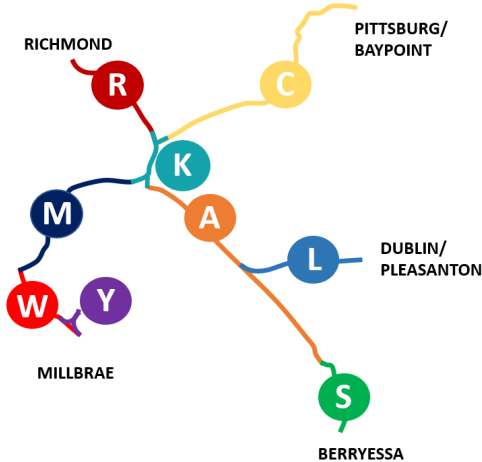
Watchlist:

- Substation Construction
- K-Line and C-Line Project Reschedule (34.5 kV Cable & Fiber Replacement Project)

# Tunnels & Structures

## STATUS & MILESTONES

EXPENDED Thru 12/2024: \$268.7  
TOTAL PROGRAM VALUE: \$549  
PERIOD CASHFLOW: \$4.6  
*All dollar values are in millions*



### STATUS – Repair Tunnels & Structures

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
0	2	6	7	12	27

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Completed Design for Richmond Yard Carwash Building Fence</li><li>Completed Aerial Bearing Pad Assessment</li></ul>	<ul style="list-style-type: none"><li>Begin Construction for Water Intrusion at Train Control Rooms (Package 2, 4 locations)</li><li><i>Begin Construction for Slope Stabilization on L and M lines (4 sites)</i></li></ul>	<ul style="list-style-type: none"><li>Completion of Construction (In-house) of Renew Catwalks at Aerial Structure (Phase 3B)</li></ul>	<ul style="list-style-type: none"><li><i>Completion of Design for East Bay Street Grates</i></li></ul>

### Watchlist:

- Design for Water Intrusion at Train Control Rooms

*Italic: Newly added and modified milestones from previous report.*



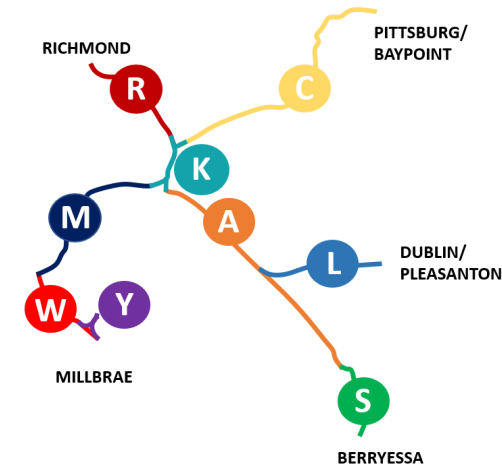


# Renew Mechanical STATUS & MILESTONES

## STATUS – Renew Mechanical

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
0	4	2	4	15	25

EXPENDED Thru 12/2024: \$92.9  
TOTAL PROGRAM VALUE: \$156  
PERIOD CASHFLOW: \$1.7  
*All dollar values are in millions*



MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
	<ul style="list-style-type: none"><li>Procure Sewage Pumps for Sewage Replacement Project</li><li>Install Transbay Tube Dampers at the Oakland Transition Structure</li></ul>	<ul style="list-style-type: none"><li>Install Sewage Pumps at Pittsburg/ Bay Point Station (C80) and 19<sup>th</sup> Street Station (K20)</li></ul>	<ul style="list-style-type: none"><li><i>Commissioning of Hayward Yard Fire Services</i></li><li><i>Issue for Bid Concord Yard Wheel Truing Facility</i></li></ul>

### Watchlist:

- Delivery Method for Fire Suppression Systems Upgrade Project

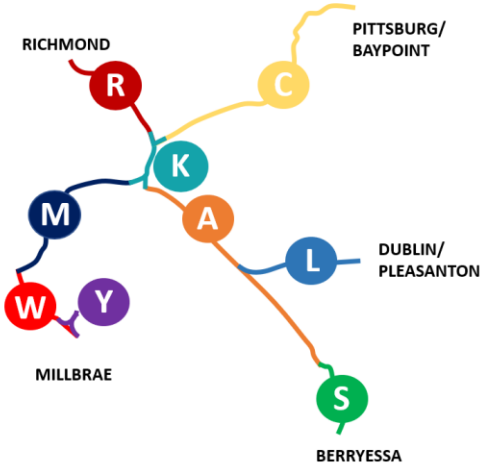
*Italic: Newly added and modified milestones from previous report.*



# Replace Train Control

## STATUS & MILESTONES

EXPENDED Thru 12/2024 : \$64.9  
TOTAL PROGRAM VALUE: \$400  
PERIOD CASHFLOW: \$8.3  
*All dollar values are in millions*



### STATUS – Replace Train Control / Increase Capacity

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
0	0	0	6	0	6

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Delivered Hi-Rail Vehicles (2 each) for Enabling Works</li><li>Completed Asbestos Remediation Work in Train Control Rooms (13 Locations)</li><li>Began Electrical Installations for CBTC between Millbrae and Colma Stations Phase 2</li></ul>	<ul style="list-style-type: none"><li>Delivery of Transponders and Data Communication Systems (DCS) Equipment for CBTC Phase 2</li><li>Completion of Migration Design Review for Axle Counter for CBTC Phase 2 (Millbrae and Colma Stations)</li><li>Begin Cable Pathway Installation for CBTC between Millbrae and Colma Stations Phase 2</li></ul>	<ul style="list-style-type: none"><li>Completion of Static Test on Hayward Test Track</li><li>Perform CBTC Equipment Testing at Lake Merritt Administration (LMA) Phase 1</li><li>Completion of Self-Performed M-Line Pre-cutover Installation Work in Train Control Room</li></ul>	<ul style="list-style-type: none"><li><i>Completion of CBTC Equipment Testing at Lake Merritt Administration (LMA) Phase 1</i></li><li><i>Start of Equipment Testing at Phase 2 (W-Line)</i></li><li><i>Start of Self-Performed A-Line Wayside Installation</i></li></ul>

### Watchlist:

- None

*Italic: Newly added and modified milestones from previous report.*

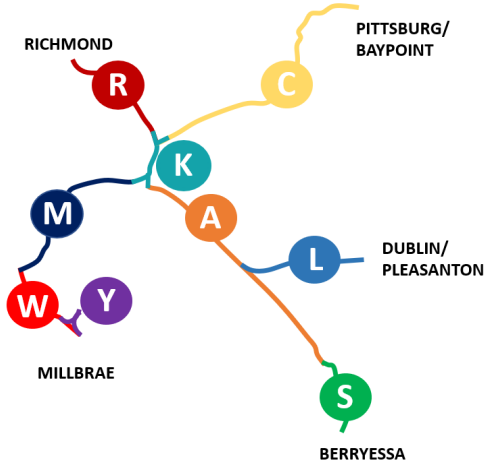


# Renew Stations

## STATUS & MILESTONES

EXPENDED Thru 12/2024 : **\$96.1**  
TOTAL PROGRAM VALUE: **\$210**  
PERIOD CASH FLOW: **\$6.8**

*All dollar values are in millions*



### STATUS – Renew Stations

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
1	2	0	2	5	10

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Completed Construction for S5 Street Level Escalator at Embarcadero Station</li><li>Completed Construction for Canopy 7 at Montgomery Station and Canopy 18 at Civic Center Station</li></ul>	<ul style="list-style-type: none"><li>Completion of Construction for P2 Platform Escalator at Civic Center Station, and P5 Platform Escalator at Powell Street Station</li><li>Completion of Construction for Canopy 1 at Embarcadero Station and Canopy 10 at Montgomery Station</li></ul>	<ul style="list-style-type: none"><li>Completion of Construction for Canopy 17 at Market Street</li><li>Completion of Construction for P3 Platform Escalator at Embarcadero Station</li></ul>	<ul style="list-style-type: none"><li>Completion of Construction for Canopy 4 at Embarcadero Station</li><li>Completion of Construction for S5 and S7 Street Escalators and P2 Platform Escalator at Montgomery Street Station, and P3 Platform Escalator at Civic Center Station</li></ul>

### Watchlist:

- Construction of Escalators

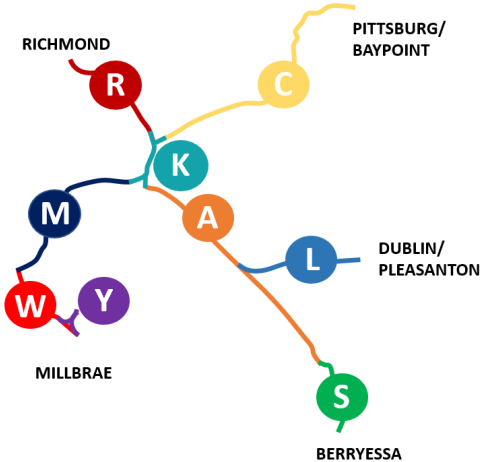
*Italic: Newly added and modified milestones from previous report.*



# Station Access

## STATUS & MILESTONES

EXPENDED Thru 12/2024 : \$51.6  
TOTAL PROGRAM VALUE: \$135  
PERIOD CASHFLOW: \$5.1  
*All dollar values are in millions*



### STATUS – Expand Safe Access to Stations

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
4	9	1	9	13	36

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Completed Design for Pittsburg/Bay Point Shared Mobility Improvement Project</li><li>Completed Exterior Construction for ADA Access Corrections at Castro Valley, Rockridge, and Richmond Stations</li><li>Completed Construction of SR2B-funded Iron Horse Trail Bridge Project</li><li><i>Completed Construction on the Ashby Bicycle Access Improvement Project</i></li></ul>		<ul style="list-style-type: none"><li>Issue for Bid Dublin/Pleasanton Station Access Improvements</li><li>Completion of 100% Redesign for PA System Improvements</li><li><i>Completion of Construction of SR2B-funded El Cerrito Del Norte Street Improvements</i></li><li><i>Completion of Construction of SR2B-funded Pittsburg Center BART Pedestrian Connectivity Project</i></li></ul>	<ul style="list-style-type: none"><li><i>Completion of Construction of North Berkeley Station Access Improvement Project</i></li><li><i>Issue for Bid Pittsburg/Bay Point Shared Mobility Improvement Project</i></li><li><i>Completion of 100% Design for Wayfinding Improvements Phase 4.1 at North Berkeley, Rockridge, and Fruitvale Stations</i></li></ul>

#### Watchlist:

- None

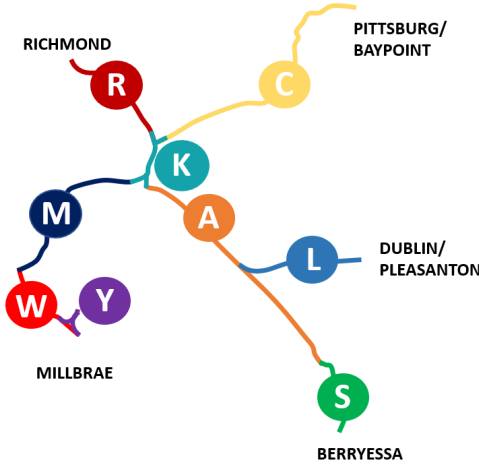
\*Milestone for Completion of Construction of Stairway Bicycle Channels at Civic Center, Embarcadero, 24<sup>th</sup> Street postponed due to project reprioritization *Italic: Newly added and modified milestones from previous report.*

# Relieve Crowding\*

## STATUS & MILESTONES

\*Full Title: Design and Engineer Future Projects to Relieve Crowding, Increase System Redundancy, and Reduce Traffic Congestion

EXPENDED Thru 12/2024 : \$163.8  
TOTAL PROGRAM VALUE: \$200  
PERIOD CASHFLOW: \$2.0  
*All dollar values are in millions*



### STATUS – Design / Engineer to Relieve Crowding\*

# Projects in Planning	# Projects in Design	# Projects in Bid/Award	# Projects in Construction	# Projects Completed	TOTAL # Projects
3	2	0	1	2	8

MILESTONES			
Completed (Oct 2024 – Dec 2024)	Q3 (Jan 2025 – March 2025)	Q4 (Apr 2025 – June 2025)	Q1 (July 2025 – Sep 2025)
<ul style="list-style-type: none"><li>Completed Construction for the Civil Grading Contract</li></ul>	<ul style="list-style-type: none"><li>Completion of Trackwork Procurement Contract</li></ul>	<ul style="list-style-type: none"><li><i>FTA Review of East Storage Yard (ESY) Optimization Plan</i></li><li><i>Completion of Design for Embarcadero Platform Elevator Project</i></li></ul>	<ul style="list-style-type: none"><li><i>FTA Acceptance of East Storage Yard (ESY) Optimization Plan</i></li></ul>

### Watchlist:

- Phasing for Embarcadero South Stairs Expansion and Platform Elevator Modernization
- Hayward Maintenance Complex Phase 2 (HMC2) Optimization Plan

*Italic: Newly added and modified milestones from previous report.*



# Budget and Schedule Status





# Earned Value Rollup by Program As of Dec 2024

Goal: CPI and SPI between 0.9 and 1.1

RR Program	Total RR Budget	Physical % Complete	Planned Value	Earned Value	Accrued to Date	CPI	SPI
Renew Track							
Renew Power							
Repair Tunnels and Structures	This information will be provided in the next quarter's report.						
Renew Mechanical							
Replace Train Control/ Increase Capacity							
Renew Stations							
Expand Safe Access to Stations							
Design/Engineer to Relieve Crowding*							
Total							

CPI – Cost Performance Index

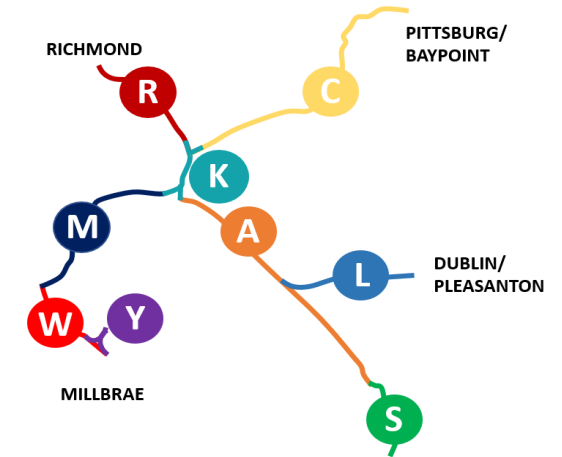
SPI – Schedule Performance Index

\*Full Title: Design and Engineer Future Projects to Relieve Crowding, Increase System Redundancy, and Reduce Traffic Congestion



# Track Program Detail

Project	Count
Number of Projects (>25% Spent)	19
CPI <0.9 or >1.1	2
SPI <0.9 or >1.1	3
Number of Risk Register Updates Performed in Previous Period	7
Number of Project(s) with Quality Reviews Performed in Previous Period	2

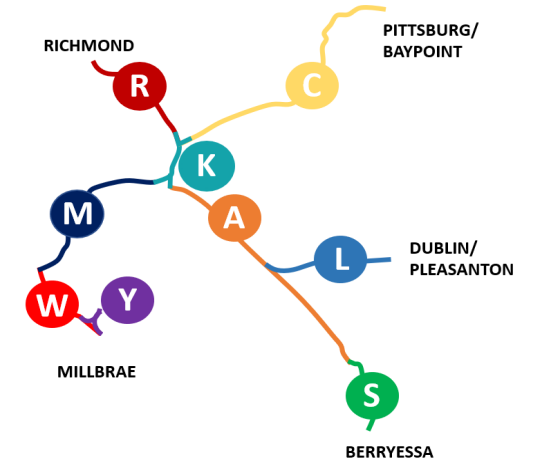


Project	Physical % Complete	CPI	SPI	Comments
Switch Replacement	84%	0.90	1.23	Completed more locations than planned
Frog Capital Maintenance	86%	0.97	0.86	Schedule impact due to unexpected asset degradation, rework needed
R65 Mainline Interlocking	100%	1.24	1.00	Production efficiency
Rail Re-Profiling	100%	1.26	1.00	Production efficiency
K-Line Interlocking K23, K25, C15	37%	1.00	0.69	Project is behind schedule due to revised Weekend Shutdown Schedule



# Power Program Detail

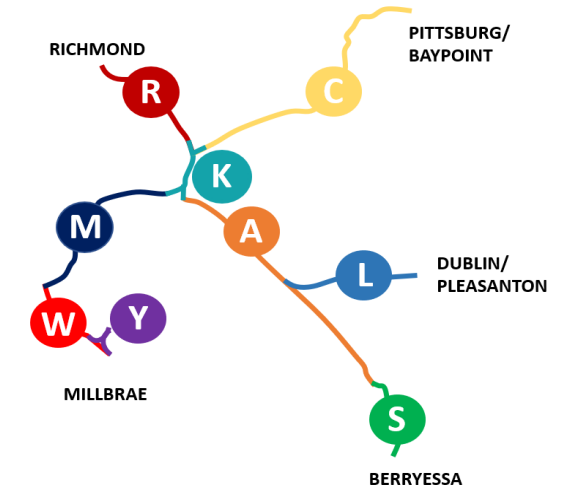
Project	Count
Number of Projects (>25% Spent)	27
CPI <0.9 or >1.1	4
SPI <0.9 or >1.1	7
Number of Risk Register Updates Performed in Previous Period	17
Number of Project(s) with Quality Reviews Performed in Previous Period	4



Project	Physical % Complete	CPI	SPI	Comments
R-Line 34.5kV AC Cable Replacement	93%	0.84	1.33	Emergency repair work performed by in-house forces. Contractor finished work ahead of schedule
C-Line 34.5kV AC Cable Replacement	20%	0.58	0.67	Carrying over the cost and schedule impact from the previous emergency repair work on the R-Line Cable project
K-Line 34.5kV AC Cable Replacement	50%	1.08	0.62	Impacted by availability of resources
PG&E Power feed to MXP Gap Breaker	27%	0.92	0.27	Impacted by coordination with external agencies
SFTS Transformer / Bus Upgrade	59%	0.86	0.69	Impacted by coordination with external agencies for transformer design, testing and installation
Substations for Core Capacity	86%	0.90	0.77	Impacted by extended testing duration
Battery Room Replacement for Train Control Rooms	93%	0.88	0.93	Delayed due to ongoing scope discussions for 2 locations
Systemwide MPR & Rectifier Renovation	61%	1.0	0.87	Impacted by availability of resources

# Tunnels & Structures Program Detail

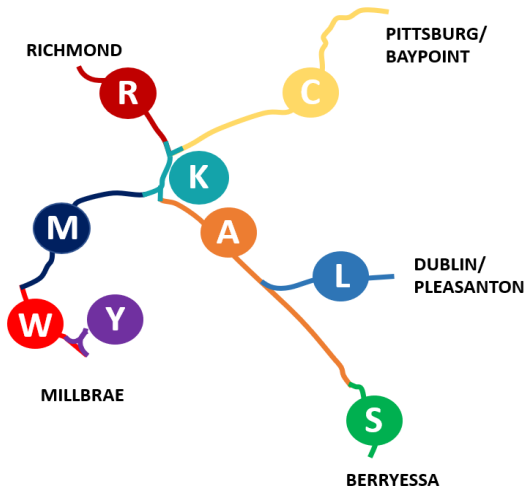
Project	Count
Number of Projects (>25% Spent)	26
CPI <0.9 or >1.1	4
SPI <0.9 or >1.1	3
Number of Risk Register Updates Performed in Previous Period	3
Number of Project(s) with Quality Reviews Performed in Previous Period	2



Project	Physical % Complete	CPI	SPI	Comments
Aerial Catwalk Renewal	46%	1.13	1.03	Efficiency with installation at more easily accessible locations
Slope stabilization (AC, CCC, SFC)	74%	0.76	0.55	Delay carried over from extended environmental clearance
Substation Roofs	53%	0.86	0.56	Additional safety requirements & training impacted the schedule
Wayside Signage Inspection and Inventory	55%	0.76	0.55	Delay due to availability of resources and challenging locations

# Mechanical Program Detail

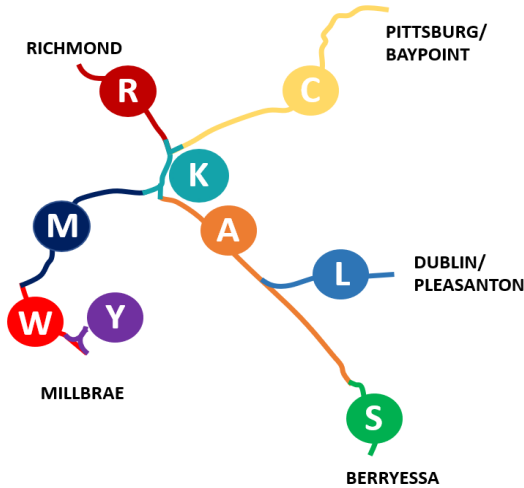
Project	Count
Number of Projects (>25% Spent)	27
CPI <0.9 or >1.1	2
SPI <0.9 or >1.1	1
Number of Risk Register Updates Performed in Previous Period	5
Number of Project(s) with Quality Reviews Performed in Previous Period	0



Project	Physical % Complete	CPI	SPI	Comments
Replace Backflow Preventers	97%	2.23	0.97	Change in delivery method (to self-performed) created a benefit to both cost and schedule
Replace Sewage Pumps	50%	0.92	0.82	Delay due to design package completion
Transbay Tube Dampers Overhaul	80%	1.14	1.05	Procurement effort is optimized and ahead of schedule

# Renew Stations Program Detail

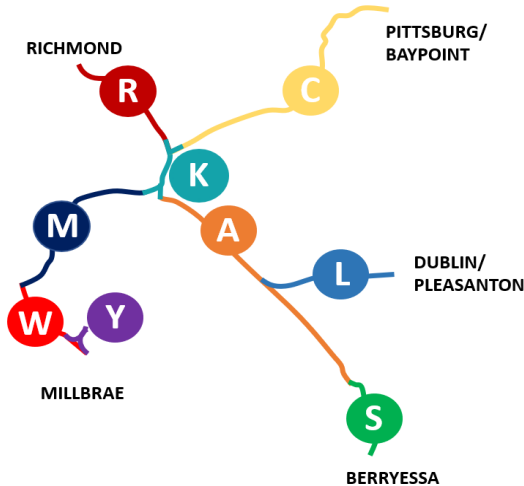
Project	Count
Number of Projects (>25% Spent)	8
CPI <0.9 or >1.1	0
SPI <0.9 or >1.1	0
Number of Risk Register Updates Performed in Previous Period	0
Number of Project(s) with Quality Reviews Performed in Previous Period	0



Project	Physical % Complete	CPI	SPI	Comments
There are no projects with CPI and SPI outside the range of 0.9 and 1.1				



# Station Access Program Detail

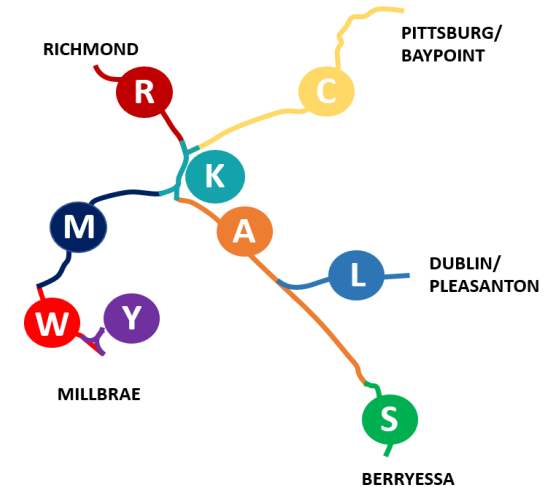


Project	Count
Number of Projects (>25% Spent)	25
CPI <0.9 or >1.1	2
SPI <0.9 or >1.1	1
Number of Risk Register Updates Performed in Previous Period	6
Number of Project(s) with Quality Reviews Performed in Previous Period	2

Project	Physical % Complete	CPI	SPI	Comments
North Berkeley Station Access Improvement	94%	1.16	0.94	Realized efficiencies in Construction phase
Bicycle Stair Channels	59%	1.21	0.92	Project incurring lower labor rates than planned

# Relieve Crowding\* Program Detail

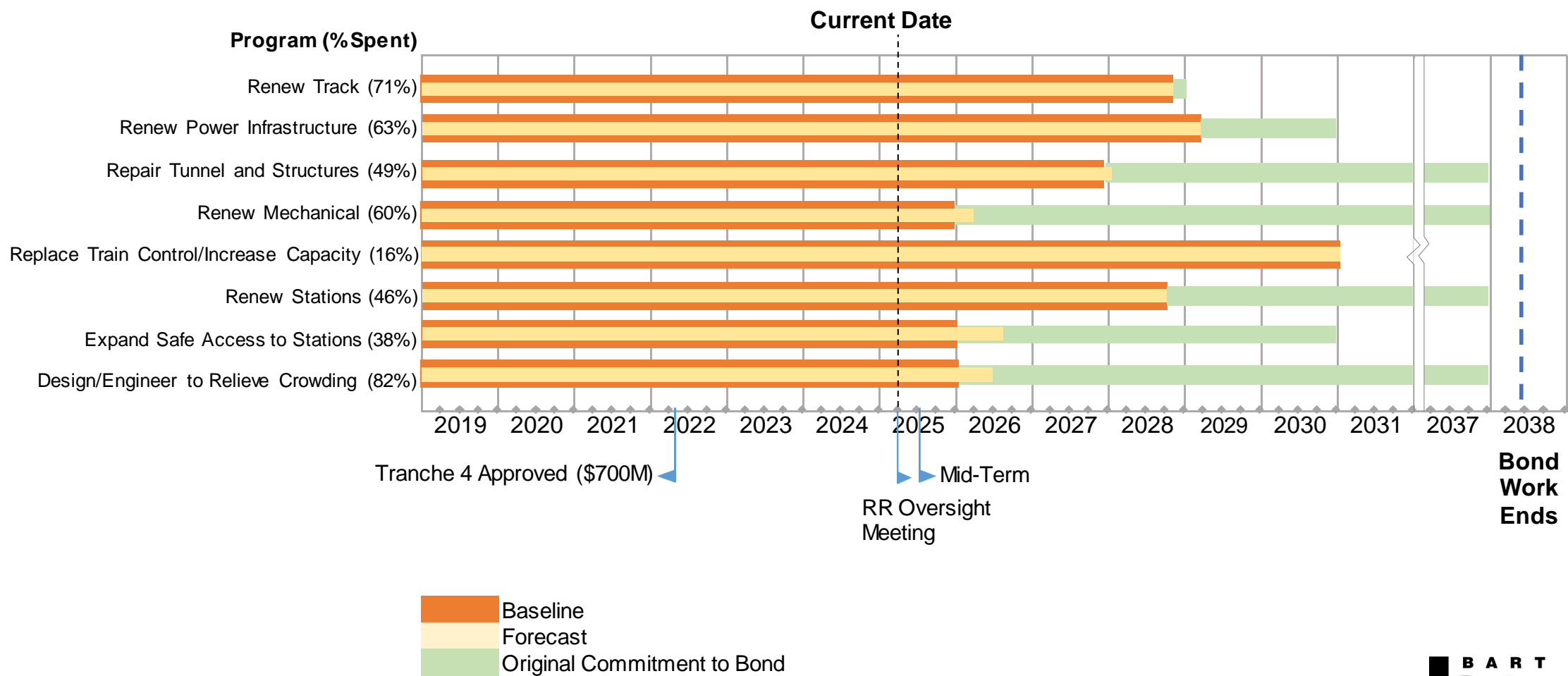
Project	Count
Number of Projects (>25% Spent)	7
CPI <0.9 or >1.1	2
SPI <0.9 or >1.1	3
Number of Risk Register Updates Performed in Previous Period	2
Number of Project(s) with Quality Reviews Performed in Previous Period	1



Project	Physical % Complete	CPI	SPI	Comments
HMC East Storage Yard	27%	0.81	0.75	Currently being reevaluated due to significant funding gap
Embarcadero Platform Elevator	26%	0.92	0.76	Design behind schedule due to additional scope for Elevator Machine Room fire sprinkler design change

\*Full Title: Design and Engineer Future Projects to Relieve Crowding, Increase System Redundancy, and Reduce Traffic Congestion

# Program Level Schedule Update



## 5.B.3. Small Business Outreach



# RR Program Update – Small Business

Program	Total RR Commitment	Total RR SB Commitment	SB Commitment %	# of SB Contracts	Total RR Payments on RR Contracts	RR Payments to SBs	SB Payment %
Renew Track	\$168.4 M	\$39.3 M	23%	196	\$151.0 M	\$36.5 M	24%
Renew Power	\$463.7 M	\$140.3 M	30%	479 (+20)	\$365.8 M (+\$8M)	\$147.3 M (+\$2M)	40%
Repair Tunnels & Structures	\$163.8 M	\$37.5 M	23%	229	\$135.9 M	\$22.7 M	17%
Renew Mechanical	\$40.7 M	\$14.2 M	35%	105	\$30.8 M	\$12.2 M	40%
Replace Train Control/Increase Capacity	\$58.0 M	\$11.3 M	19%	215	\$37.6 M	\$4.9 M	13%
Renew Stations	\$163.3 M	\$30.9 M	19%	157	\$90.8 M (+\$11M)	\$15.4 M	17%
Expand Safe Access to Stations	\$24.6 M	\$7.5 M	31%	196	\$21.5 M	\$7.1 M	33%
Design/Engineer to Relieve Crowding	\$146.7 M	\$36.3 M	25%	243	\$135.8 M	\$35.9 M	26%
<b>Total</b>	<b>\$1,229.1 M (+\$7M)</b>	<b>\$317.3 M (+\$2M)</b>	<b>26%</b>	<b>1819 (+41)</b>	<b>\$969.2 M (+\$32M)</b>	<b>\$282.1 M (+\$8M)</b>	<b>29%</b>

Notes: All amounts are based on RR fund percent only. Amounts are updated to February 28, 2025. Includes formal contracts only; does not include informal purchases or work performed by BART's own forces. SB totals include DBEs, MSBEs, SBs, and LSBs. Sources: RR commitments are based on RR Requisitions report, Procurement Sealed Bids Report and PeopleSoft Work Plans application. RR% for each project is based on Financial Analysts' report, RR Funds / Total Project Budget. Payments based on PeopleSoft and B2GNow.



# RR Program Update - Small Business Outreach



*BART Civil Rights Staff Presents to  
Small Businesses at BHQ*

## Recently Completed Events

- **12/5/24:** “How to do Business with BART” – Zoom
- **2/13/25:** “Learn about BART’s Equity Programs and Certifications Opportunities” – Zoom
- **2/19/25:** “East Bay Procurement Summit” – Hayward, CA

## Upcoming Events (Tentative Dates)

- **5/19/25:** “2025 Small Business Summit” – Oakland, CA
- **5/20/25:** “Small Business Certifications Workshop” – Zoom
- **5/21/25:** “Small Business Support Services – Pre Award Workshop” – Zoom



# Thank you!



# Acronyms

<b>ADA</b>	Americans with Disabilities Act
<b>CBTC</b>	Communication Based Train Control
<b>CPI</b>	Cost Performance Index
<b>DBE</b>	Disadvantaged Business Enterprise
<b>EAC</b>	Estimate At Completion
<b>ETC</b>	Estimate to Complete
<b>EVM</b>	Earn Value Management
<b>HMC</b>	Hayward Maintenance Complex
<b>LSB</b>	Local Small Business
<b>MPR</b>	Multi-Function Protection Relay
<b>MSBE</b>	Micro Small Business Entity
<b>OCIO</b>	Office of the Chief Information Officer
<b>OID</b>	Office of Infrastructure Delivery
<b>PA</b>	Public Announcement
<b>SB</b>	Small Business
<b>SPI</b>	Schedule Performance Index
<b>TCMP</b>	Train Control Modernization Program

