System Development Policy
Adopted September 28, 2023

1. Purpose
Future development of the San Francisco Bay Area Rapid Transit District (BART) system must consider the continued growth and change of the region, and the role of the BART system in meeting the needs of the region and megaregion. This Policy is intended as a framework for BART to evaluate proposed new line extensions and stations as well as infill stations. Any major new system development project must provide clear, measurable benefits to the system and its riders, as well as demonstrate the ability to address the region's goals to grow transit ridership, address the climate emergency, improve mobility, and ensure equitable outcomes.

2. Goals and Objectives
a) Support regional livability and a sustainable, equitable, and prosperous Bay Area.
   i. Increase ridership and transit mode share via greater accessibility, connectivity, and service that complements changing travel patterns and serves transit dependent riders.
   ii. Ensure transit-oriented communities bolster BART extensions and infill stations, help address the housing crisis, and improve the region's jobs/housing balance.
   iii. Advance BART, state, and regional environmental goals by improving transit access to regional destinations, reducing vehicle miles traveled, and ensuring climate resiliency.

b) Better serve communities and improve the rider experience.
   i. Ensure equity by prioritizing the needs of transit-dependent riders, with special emphasis placed on communities who are or who have been systemically disenfranchised, traditionally marginalized, and harmed by past infrastructure projects.
   ii. Improve multimodal connectivity with a focus on improved transit connectivity and active access modes.
   iii. Improve rider experience by enhancing service reliability and connectivity, reducing crowding, and providing a safe and healthy environment.

c) Support stewardship of the BART District and taxpayer investment.
   i. Ensure the District's long-term financial sustainability by considering the benefits of system development through a comprehensive cost assessment that considers operational and maintenance cost and complexity, as well as core system operational and capital impacts.
   ii. Deliver cost-effective improvements that meet riders' needs, employing technology and mode appropriate transit service, and leveraging other capital investments in transportation.
   iii. Improve system performance without detracting from existing service or overburdening existing assets, providing systemwide benefits where feasible.

3. Implementation
a) Strategies
   The following Strategies support extensions and infill station project development consistent with the Goals and Objectives.
   i. Partnership with local jurisdictions: Partner with jurisdictions to achieve policy goals by ensuring transit-supportive land use policies, zoning and practices, anti-displacement policies and practices, climate adaptation planning, safe multimodal access to stations, and funding support.
   ii. Community involvement: Ensure that a unified process for co-creation and community engagement is central to the development of any system expansion and that this process begins at this early stage of the planning process, is inclusive of priority populations and emphasizes equitable outcomes. Engagement with local communities and businesses must recognize that historically disenfranchised communities have been underserved and negatively impacted by transit.

iii. <u>Iterative and comprehensive benefits evaluation</u>: Project sponsors of new extensions and/or infill stations will coordinate with BART staff to develop a business case that evaluates cost-benefit and demonstrates comprehensive, equitable, and transparent measurable project benefits to the region and transit riders.

iv. <u>Funding</u>: Projects will be consistent with applicable local, state, and federal funding programs' requirements to maximize the ability to receive funding. All projects must develop a funding plan as a part of the business case process.

v. <u>Innovation and efficiency</u>: Projects should seek to reduce delivery time and cost via innovative approaches and should incorporate lessons learned from previous major projects.

b) Project Evaluation Process

Projects are to be led or supported by a Project Sponsor (e.g., BART, local jurisdictions, Metropolitan Planning Organizations, County Transportation Authorities). Figure 1 shows the steps in the process to advance Project Evaluation are described in greater detail below, and consist of the following:

i. <u>Project Initiation</u>: Project initiation includes the project definition, policy assessment, and an initial evaluation of the strategic opportunity by assessing a project's consistency with relevant BART, regional, and federal policy and guidance (e.g., BART's Transit-Oriented Development Guidelines, Metropolitan Transportation Commission's Transit-Oriented Communities Policy, and Federal Transit Administration's Capital Investment Grant Program, among others). For projects that are consistent with the initial policy assessment, the Project Sponsor shall enter into an MOU with BART and relevant regional funding body to fund and complete a business case assessment on the proposed project.

ii. <u>Business Case Process</u>: Each business case assessment will be an iterative analysis that consists of four cases, two of which (Strategic and Economic Cases) relate to the rationale for pursuing a project, and two of which (Financial and Deliverability and Operations Cases) relate to project implementation. The level of detail increases over time in relationship to the project development. At each decision point, the BART Board must approve the continuation of the project to the next stage. Projects that don't demonstrate sufficient comprehensive benefits will not advance.

iii. <u>Project/Program Advancement</u>: After a project has been approved for advancement under the Final Business Case, additional board actions may be required to continue advancement, such as where project cost and/or scope have changed substantively. After the project is operational, there may also be a review of the actual project outcomes (e.g., costs and performance to provide lessons learned).
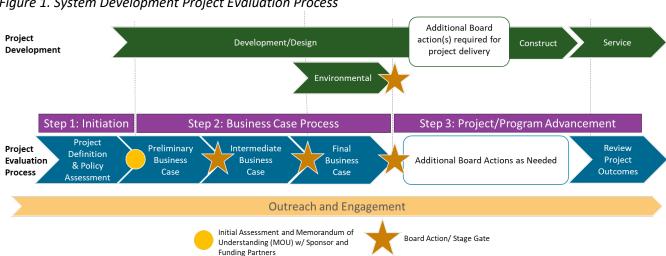
Figure 1. System Development Project Evaluation Process