



BART System Development Policy Update

September 14, 2023



Update Overview

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

Proposed Policy Framework Overview

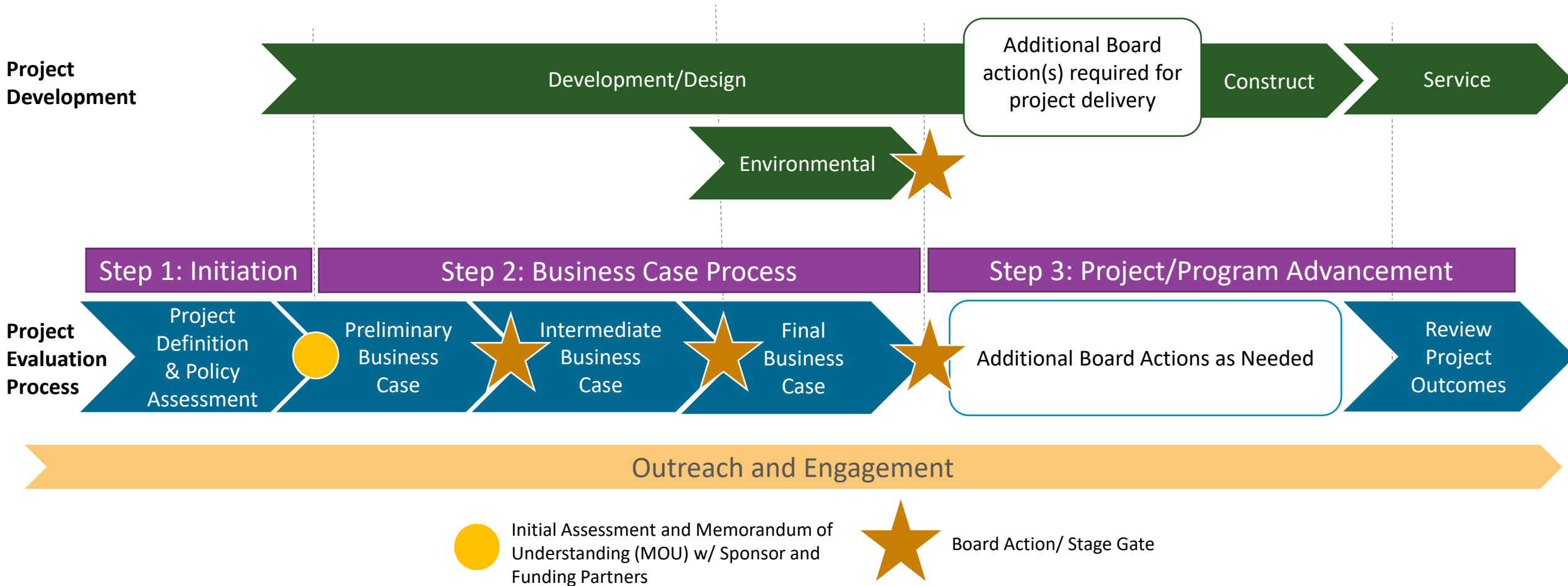
1. Purpose: evaluation framework for proposed new line extensions and stations (including infill)
2. Goals and Objectives
 - a) Support regional livability and a sustainable, equitable, and prosperous Bay Area
 - b) Better serve communities and improve the rider experience
 - c) Support stewardship of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

Proposed Goals and Objectives

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

* See Policy Document for Full Language on Objectives

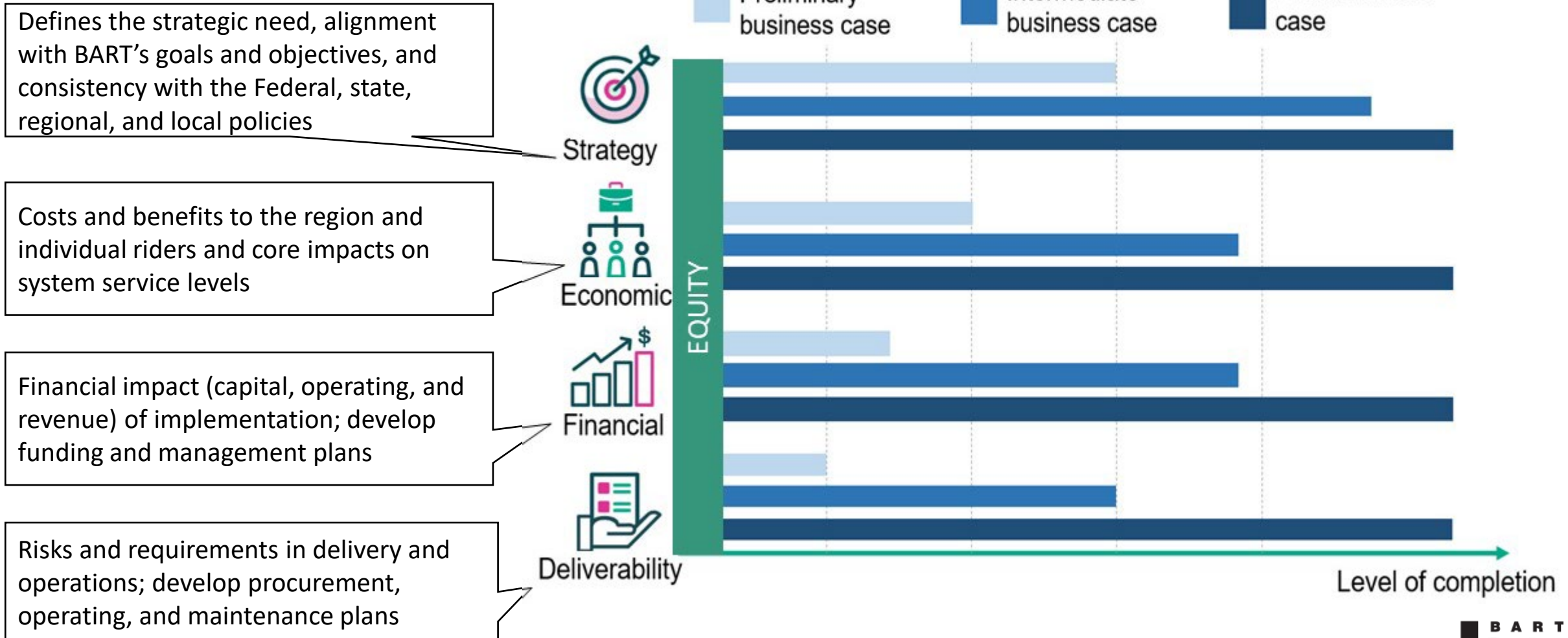
Proposed Implementation Process*



Step 1: Project Initiation

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

Step 2: Business Case Evaluation of 4 Elements



Step 3: Project/Program Advancement

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

Next Steps

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

Discussion

