NOTICE OF MEETING AND AGENDA
BOND OVERSIGHT COMMITTEE

Friday, December 18, 2020
9:30 a.m. – 12:00 p.m.

COMMITTEE MEMBERS: Marian Breitbart, Michael Day, Leah Edwards, Daren Gee, Michael McGill, Catherine Newman, Sonja Stewart

Please note, pursuant to Governor Newsom’s Executive Order N-29-20 and the California Shelter-in-Place mandate, which prevents all but essential travel, public participation for this meeting will be via teleconference only.

Presentation materials will be available at: www.bart.gov/about/bod/advisory/bond

You may join the Bond Oversight Committee Meeting via WebEx by calling 1-888-204-5987 (US/Canada) and entering access code 686 641 8.

If you wish to make a public comment:

Submit written comments via email to mmorale@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. in order to be included in the record.

Public comment is limited to three (3) minutes per person.

AGENDA

1. Call to Order (5 minutes)
   A. Roll Call
   B. Welcome Sonja Stewart and Introduction of BART Staff

2. Meeting Minutes: September 18, 2020 (For Discussion/Action) (5 minutes)

3. Adoption of Standing Rules (For Discussion/Action) (5 minutes)

4. Set Dates for 2021 Bond Oversight Committee Meetings (For Discussion) (5 minutes)

5. Annual Report Subcommittee – 2021 Annual Report (For Discussion) (20 minutes)
   A. Review Draft Outline (For Discussion) (15 minutes)
   B. Set Date for Subcommittee Meetings (For Discussion) (5 minutes)

6. BART Safety, Reliability and Traffic Relief Program (Measure RR) Presentation (For Discussion) (72 minutes)
   A. Office of Civil Rights (5 minutes)
      1. Q&A (10 minutes)
   B. Human Resources/Staffing (5 minutes)
      1. Q&A (10 minutes)
C. Station Modernization Project – Union City (10 minutes)
   1. Q&A (10 minutes)

D. Program Updates (12 minutes)
   1. Q&A (10 minutes)

7. Requests for Future Agenda Items (For Discussion) (5 minutes)

8. Committee Member Announcements (For Discussion) (5 minutes)

9. Public Comment (5 minutes)

10. Adjournment (5 minutes)

BART provides service/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.
## Agenda Item 1: Call to Order
- A. Roll Call
- B. Introduction of BART Staff

### Meeting Notes
- All committee members are present. Staff introduces themselves.

## Agenda Item 2: Meeting Minutes: May 29, 2020

### Meeting Notes
- Committee unanimously passes the minutes.
<p>| | | |</p>
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<tbody>
<tr>
<td>3.</td>
<td>Update on Filling Project Management Institute Vacancy</td>
<td>L. Johnson updates the committee on the search to fill the vacant Project Management Institute seat.</td>
</tr>
<tr>
<td>4.</td>
<td>Chairman Recaps His Presentation of the 2020 Annual Report before BART Board of Directors</td>
<td>M. McGill says this year’s presentation went well. He credits staff with doing a good job explaining to the BART Board of Directors all the technical details about Measure RR ahead of his presentation.</td>
</tr>
</tbody>
</table>
| 5. | Annual Report Subcommittee – Set Dates for 2021 Annual Report and Subcommittee Meetings | C. Filippi says he will have a draft outline of the 2021 annual report at the next committee meeting in December.  
L. Edwards asks the committee to consider a request from the public who asked that the next report speaks to how BART is managing costs and/or shows how BART manages costs compared with other agencies.  
Committee requests that L. Johnson firm up subcommittee meeting dates off-line. |
| 6. | BART Safety, Reliability & Traffic Relief Program (Measure RR) Update | T. Johnson begins the presentation.  
J. Towner presents the Measure RR Small Business update  
V. Thomas and A. Contesh present the Measure RR hiring update.  
G. Wong updates committee on 34.5 kV replacement project  
T. Johnson and S. Lamb lead the completion of the remaining portion of the report.  
C. Newman wants to see the numbers from the last meeting on the current slides. However, to keep the slides compact, T. Johnson suggests that on the slides – especially the HR slides – staff will do pluses and minuses. C. Newman agrees. |
<table>
<thead>
<tr>
<th></th>
<th>Request for Future Agenda Items</th>
<th>T. Johnson recommends the committee hear a report on station modernization and the committee agrees.</th>
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</thead>
<tbody>
<tr>
<td>8.</td>
<td>Committee Member Announcements</td>
<td>None.</td>
</tr>
<tr>
<td>9.</td>
<td>Public Comment</td>
<td>None.</td>
</tr>
<tr>
<td>10.</td>
<td>Adjournment</td>
<td>M. McGill adjourns the meeting.</td>
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MEMORANDUM

TO: Bond Oversight Committee
FROM: Linton Johnson
Strategic Programs Manager
SUBJECT: Proposed Changes to the Committee’s Standing Rules

Dear Chair McGill, Vice Chair Newman and Committee Members,

Attached are BART staff’s proposed updates to the Measure RR Bond Oversight Committee’s Standing Rules (“Rules”). While each committee member was required to sign the Rules prior to their appointment, the committee was never asked to adopt the Rules. As a result, they were never official and thus unenforceable, according to the District’s Legal Department.

Staff has updated the Rules so they are more consistent with how the committee has been operating. The following are a few key changes to the Rules that staff is proposing for your consideration:

- Removing “Citizen” from the Committee name as the formal name is Bond Oversight Committee
- Selecting a Chair and Vice Chair every two years with the election taking place at the beginning of each term
- Removing the word “shall” from the language stating that the BART Board can select up to seven alternates (so far, the Board has never appointed an alternate)
- Stating that meetings will be held quarterly
- Revising how staff will report to the BART Board of Directors a member who fails to attend the minimum number of meetings

The committee may adopt the staff’s recommendation or members may make changes, additions or deletions.
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.
Key comments/guidance from meeting with annual report subcommittee

- COVID impacts on rebuilding to be key theme of report. Desire for individual section on COVID and for impacts to be weaved throughout report.
- Provide greater context. Not only on what progress has been made but how it compares with initial expectations. Work with subcommittee on ideas for new/expanded charts.
- Identify how BART is being efficient with its rebuilding resources.
- Interest in adding an appendix or links to info/data already available on BART.gov. Could include a full project list, hiring breakdown, and bond information.
- Continue to focus and improve on communicating in an easily understood way with as little BART-speak as possible. Explain terms of art to enhance understanding and context.

Report Outline

1. Table of Contents
2. Committee Chair Welcome Letter
3. Executive Summary
   a. Explain what committee is charged with presenting.
   b. Provide number of projects underway and total spent.
   c. Mention COVID and foreshadow how it’ll be addressed in rest of the report.
   d. Offer insight on where Measure RR is compared with where we hoped to be at this point.
4. About the Bond Oversight Committee
   a. List organizations represented on committee and explain its oversight role for RR.
5. Story of Measure RR
   a. Explain the basics of the bond measure.
   b. How RR made the ballot/public outreach leading up to vote.
6. BART’s rebuilding program responds to the pandemic
   a. Explore how BART has been able to advance some rebuilding projects.
   b. What is being done to keep workers safe in this new environment?
   c. Examine challenges presented by pandemic (supply chain, shifting construction costs, safety)
   d. Load shedding: What is it and what are the benefits?
   e. Highlight how BART has been transparent throughout in its response.
7. Highlight most visible projects (will work on title)
   a. Describe major track work/cable replacement and public outreach for those projects.
   b. Show steps taken to lessen public impacts track shutdowns/single tracking.
   c. Describe the depth and level of coordination required to successfully complete major projects.
   d. Highlight major impacts coming up.
8. The Lifespan of Measure RR
   a. Revised bar graph that shows expected durations of each of the eight major project categories.
9. Putting People to Work
a. Highlight/profile those who are making RR projects happen.
b. Describe how many jobs created through RR work.

10. Small Business Outreach
   a. Update status of small business contracts.
   b. Profile small businesses doing RR work.
   c. Detail small business outreach efforts.

11. Innovations in Infrastructure
   a. Based on presentation to BART Board in September.
   b. Highlight new ideas being implemented to move BART away from being reactive to emphasizing predictive actions.

12. Green Bonds
   a. Explain what green bonds are and why the designation matters.
   b. Where things stand after issuance of second tranche of bonds.

13. Measure RR Spending Breakdown
   a. Chart showing percentage of total bond expended on major project groups.

14. RR – Only Part of the Solution
   a. Pie chart that shows all funding categories and remaining gap.
   b. Outline overall rebuilding plan and how RR fits in.

15. Exceeding Bond Requirements
   a. Explain legal spending requirements.
   b. Describe whether RR spending is meeting those regulations.

16. Major Project Sections
   • Include system maps to show all projects for each category to highlight on-going RR work.
   • Highlight major accomplishments as well as total amount spent for each section.
     a. Renew Track
     b. Renew Power Infrastructure
     c. Repair Tunnels and Structures
     d. Renew Mechanical.
     e. Renew Stations
     f. Train Control Modernization
     g. Relieve Crowding
     h. Access Improvements

17. Committee Activities and Expenditures
   a. Meeting recaps.
   b. Expenditure total for committee.
BART Safety, Reliability, and Traffic Relief Program (Measure RR) Update

Bond Oversight Committee
December 18, 2020
• 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
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page No.</th>
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</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>4</td>
</tr>
<tr>
<td>RR Program Small Business &amp; Outreach</td>
<td>5</td>
</tr>
<tr>
<td>RR Program Hiring</td>
<td>8</td>
</tr>
<tr>
<td>Work Progress Since Last Meeting</td>
<td>10</td>
</tr>
<tr>
<td>Union City Station Modernization</td>
<td>13</td>
</tr>
<tr>
<td>Individual Program Milestones</td>
<td>27</td>
</tr>
<tr>
<td>Budget and Schedule Status</td>
<td>36</td>
</tr>
<tr>
<td>Next Steps</td>
<td>44</td>
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</tbody>
</table>
Executive Summary

• Through October 2020, $689.8M of the Measure RR funds have been invested to complete 23% of the work.

• Successes
  • Received Full Funding Grant Agreement and award Train Control Modernization design-build contract
  • Safe Routes to BART Grant Program – first four projects selected
  • Interlocking projects meeting performance metrics
    • A65 is complete

• Challenges
  • COVID-19
  • Early retirement incentive

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
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<tbody>
<tr>
<td>6 (-1)</td>
<td>45 (-7)</td>
<td>21(-3)</td>
<td>57 (+10)</td>
<td>19 (+1)</td>
<td>148</td>
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</tbody>
</table>

+ (Projects added in the phase)
- (Projects no longer in the phase)
RR Program
Small Business & Outreach
## RR Program Update – Small Business

<table>
<thead>
<tr>
<th>Program</th>
<th>Total RR Commitment</th>
<th>Total RR SB Commitment</th>
<th>SB Commitment %</th>
<th># of SB Contracts</th>
<th>Total RR Payments on RR Contracts</th>
<th>RR Payments to SBs</th>
<th>SB Payment %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew Track</td>
<td>$102,364,202</td>
<td>$31,216,203</td>
<td>30%</td>
<td>106</td>
<td>$58,292,801</td>
<td>$11,820,537</td>
<td>20%</td>
</tr>
<tr>
<td>Renew Power</td>
<td>$165,282,688</td>
<td>$81,211,507</td>
<td>49%</td>
<td>160</td>
<td>$106,780,896</td>
<td>$64,715,137</td>
<td>61%</td>
</tr>
<tr>
<td>Repair Tunnels &amp; Structures</td>
<td>$106,630,911</td>
<td>$26,396,902</td>
<td>25%</td>
<td>105</td>
<td>$59,186,986</td>
<td>$9,123,265</td>
<td>15%</td>
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<tr>
<td>Renew Mechanical</td>
<td>$30,343,198</td>
<td>$10,622,651</td>
<td>35%</td>
<td>55</td>
<td>$15,645,706</td>
<td>$5,598,265</td>
<td>36%</td>
</tr>
<tr>
<td>Replace Train Control/Increase Capacity</td>
<td>$10,856,044</td>
<td>$2,353,513</td>
<td>22%</td>
<td>35</td>
<td>$7,272,080</td>
<td>$1,235,048</td>
<td>17%</td>
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<tr>
<td>Renew Stations</td>
<td>$144,001,101</td>
<td>$26,379,454</td>
<td>18%</td>
<td>82</td>
<td>$20,248,238</td>
<td>$5,602,292</td>
<td>28%</td>
</tr>
<tr>
<td>Expand Safe Access to Stations</td>
<td>$15,404,733</td>
<td>$4,214,087</td>
<td>27%</td>
<td>92</td>
<td>$7,754,413</td>
<td>$2,803,294</td>
<td>36%</td>
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<tr>
<td>Design/Engineer to Relieve Crowding</td>
<td>$53,462,112</td>
<td>$14,193,410</td>
<td>27%</td>
<td>47</td>
<td>$10,305,042</td>
<td>$4,794,689</td>
<td>47%</td>
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<td><strong>Total</strong></td>
<td><strong>$ 628,344,990</strong></td>
<td><strong>$196,587,727</strong></td>
<td><strong>31%</strong></td>
<td><strong>681</strong></td>
<td><strong>$285,486,163</strong></td>
<td><strong>$105,692,526</strong></td>
<td><strong>37%</strong></td>
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Notes: All amounts are based on RR fund percent only. Amounts are updated to November 13, 2020. 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.
Recently Completed Events
– BART SB Outreach - Meet Project Staff and Learn About Upcoming RR Opportunities
– BART SB Outreach - How to do Business with BART
– BART SBSS - Ask Me Anything (Estimating & Bidding)
– BART SBSS - Ask Me Anything (Finance & Administration)

Upcoming Events
– BART SBSS - Technical Assistance “Help Desk”
– BART SB Outreach – Learn About BART’s Procurement Process
– BART SB Outreach - Meet Project Staff and Learn About Upcoming RR Opportunities
RR Program
Hiring
Recruitment

Bond Hiring Summary - To Date

<table>
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<tr>
<th># of Positions</th>
<th>FILLED</th>
<th>REMAINING POSITIONS</th>
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<tr>
<td></td>
<td>332</td>
<td>103</td>
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</table>

- 332 positions filled to date
- 76% of hiring goal fulfilled to date
- Load Shedding
- 20 positions – pending recruitments

Load Shedding Operating to Capital due to Service Reduction

Next Quarter staffing load shedding estimated 110 for temporary reallocation to take advantage of increased blanket time
Work Progress Since Last Meeting
Examples of Active RR Projects in August 2020 – October 2020

**Renew Track**
1. Replace Direct Fixation Pads (Systemwide Not Mapped) – Ongoing Construction
2. Oakland Yard Track Geometry Vehicle Storage Shed – NTP Issued*
3. Rail Relay – Ongoing Construction – (Systemwide Not Mapped)
4. A65 Track Interlocking Replacement – Ongoing Construction*

**Renew Power Infrastructure**
5. M-Line 34.5kV Cable Replacement – Ongoing Construction
6. A-Line 34.5kV Cable Replacement – Contract Awarded
7. Third Rail Replacement (Systemwide Not Mapped) – Ongoing Construction

**Renew Tunnel & Structures**
8. Substation Walls – Ongoing Construction (Systemwide Not Mapped)*
10. Aerial Fall Protection A line North – Contract Awarded*
11. Richmond Yard Fence Rehabilitation – Contract Awarded*

**Renew Mechanical**
12. Coverboard Enhancement – Ongoing Construction
13. Facilities HVAC Equipment Replacement System Wide Phase 1 – Ongoing Construction (Not Mapped)

**Design/Engineer to Relieve Crowding**
14. Civic Center Scissor Stairs – Ongoing Construction
15. Hayward Maintenance Complex Phase 2 – Trackwork Procurement – Contract Awarded*

**Renew Stations**
16. 19th Street Station Modernization – Ongoing Construction
17. Market Street Canopies and Escalator – Ongoing Construction*
18. Union City Station Modernization - Ongoing Construction*

**Expand Safe Access**
19. eBART Antioch Parking Lot Contract – Ongoing Construction*
20. Embarcadero and Civic Center Bike Station Modernization – Project Close Out*
21. Safe Route to BART Grant Program – Launched (Not Mapped)

**Replace Train Control/Increase Capacity**
22. CBTC Design Build Contract – NTP (Systemwide Not Mapped)

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*Updated projects

Projects with Accelerated work due to COVID-19 service reduction
Updated Projects

Measure RR - Project Progress

Renew Track
1. Replace Direct Fixation Pads (Systemwide Not Mapped) – Ongoing Construction
2. Oakland Yard Track Geometry Vehicle Storage Shed – NTP Issued
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Replace Train Control/Increase Capacity
22. CBTC Design Build Contract – NTP (Systemwide Not Mapped)
Phase 2A Improvement Project Plan
View of the Original East Side
This project will provide the following improvements to Union City Station

- Create a new station entrance on the East side (previously the station was only accessible from the west side)
- Install two new escalators
- Provide two sets of stairs (one new, one retrofitted)
- Expand platform and canopy
- Add wayfinding signage
- Add LED Lighting
Another View of Original East Side
Eastside Elevation Rendering
Construction on East Side
Construction on East Side
Construction on the East Side
Construction on the East Side
Construction on the East Side
Current Progress

• Structural steel erection is 100% complete for both North and South side.
• Structural concrete work is 95% complete.
• Fire proofing, fire suppression system, glass, roofing and LED lighting installation in progress.
• Both escalator trusses are in position. Schindler is working on finalizing installation and commissioning.
Next Steps

• Open the new platform, escalator and vestibule on South end – Spring 2021
• Open the second platform, escalator and vestibule on North end – early Fall 2021
Individual Program Milestones
Renew Track

STATUS & MILESTONES

EXPENDED Thru 10/2020: $223.6
FORECAST Thru 9/2023: $382
TOTAL PROGRAM VALUE: $625
PERIOD CASHFLOW: $22.4

STATUS – Renew Track

<table>
<thead>
<tr>
<th># Projects in Planning</th>
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<tr>
<td>1</td>
<td>3</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>20</td>
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MILESTONES

Completed

- NTP for Oakland Yard Track Geometry Vehicle Storage Shed
- Completion of Construction Shutdowns for A65 Interlocking Replacement (near Hayward Yard)

Q2
(Nov 2020 – Dec 2020)

- Mobilization/Construction Begin for R65 Interlocking Replacement (near Richmond Station)
- Mobilization/Construction Begin for Oakland Yard Track Geometry Vehicle Storage Shed
- Completion of Construction of C25

Q3
(Jan 2021 – Mar 2021)

- Completion of Construction Shutdowns for R65 Interlocking Replacement (near Richmond Station)
- Issue for Bid for Special Trackwork for A77 Interlocking Replacement (Near Hayward Yard)

Q4
(Apr 2021 – Jun 2021)

- Completion of Construction Shutdowns for A75 Interlocking Replacement (near Hayward Yard)

Watchlist:

- Material delivery

Italic: Modified milestones from previous report.
## Renew Power

### STATUS & MILESTONES

| EXPENDED Thru 10/2020: $258.6 |
| FORECAST Thru 9/2023: $573 |
| TOTAL PROGRAM VALUE: $1,225 |
| PERIOD CASHFLOW: $21.5 |

### STATUS – Renew Power Infrastructure

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<tr>
<th># Projects in Planning</th>
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</tr>
</thead>
<tbody>
<tr>
<td>0</td>
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<td>5</td>
<td>15</td>
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</table>

### MILESTONES

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• NTP for Transbay Tube East Bay Substation Installation</td>
<td>• Completion of Design for 34.5kV Blocking Scheme Systemwide</td>
<td>• Contract Award for R Line 34.5kV Cable Replacement</td>
<td>• Issue for Bid Traction Power Substation Replacement – Walnut Creek Station</td>
</tr>
<tr>
<td>• Completion of Design for Station Fire Alarm Replacement Phase 3</td>
<td>• Issue for Bid Station Fire Alarm Replacement-Phase 3</td>
<td>• Completion of Design for Station Fire Alarm Replacement Phase 4</td>
<td></td>
</tr>
<tr>
<td>• NTP for A-line 34.5kV Replacement (Alameda County)</td>
<td>• Complete Commissioning of new Substation at San Leandro Station</td>
<td>• Planning for Tunnel Lighting Replacement Phase 2 by BART forces</td>
<td></td>
</tr>
</tbody>
</table>

### Watchlist:

- R-Line 34.5kV Bids and Evaluation

*Italic*: Modified milestones from previous report.
## Tunnels & Structures
### STATUS & MILESTONES

| EXPENDED Thru 10/2020: $63.4 |
| FORECAST Thru 9/2023: $136 |
| TOTAL PROGRAM VALUE: $570 |
| PERIOD CASHFLOW: $8.5 |

### STATUS – Repair Tunnels & Structures

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12</td>
<td>1</td>
<td>8</td>
<td>4</td>
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</tbody>
</table>

### MILESTONES

<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• NTP for Aerial Fall A-Line North</td>
</tr>
<tr>
<td>• Executed de-scoping Change Order for the Transbay Tube Project</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q2 (Nov 2020 – Dec 2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Completion of Construction for Platform Rehabilitation at Hayward Station</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q3 (Jan 2021 – Mar 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Completion of Construction for Substation Walls</td>
</tr>
<tr>
<td>• NTP for Richmond Yard Fence Rehabilitation</td>
</tr>
<tr>
<td>• Completion of Construction for Safety Barriers by Contractor</td>
</tr>
<tr>
<td>• Construction begin for Aerial Fall Protection A Line North</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q4 (Apr 2021 – Jun 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Issue for Bid Cross Passage Doors (Systemwide)</td>
</tr>
</tbody>
</table>

### Watchlist:

- East Bay Street Grates (moved to perform by BART forces)
- Cross Passage Doors (Systemwide)

*Italic: Modified milestones from previous report.*
Renew Mechanical

STATUS & MILESTONES

EXPENDED Thru 10/2020: $39.0
FORECAST Thru 9/2023: $77
TOTAL PROGRAM VALUE: $135
PERIOD CASHFLOW: $8.7

STATUS – Renew Mechanical

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
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<tbody>
<tr>
<td>1</td>
<td>6</td>
<td>6</td>
<td>11</td>
<td>1</td>
<td>25</td>
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</table>

MILESTONES

<table>
<thead>
<tr>
<th>Completed</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Construction Begin for Vacuum System Replacement (Oakland Yard)</td>
<td>• Completion of Construction Concord Yard Fire Services</td>
<td>• Completion of Construction for Rotoclones Replacement</td>
<td>• Completion of Construction Coverboard Enhancement</td>
</tr>
<tr>
<td></td>
<td>• Completion of Design for Hayward Yard Fire Services</td>
<td></td>
<td>• Construction start for Replace Fire Suppression System at LMA &amp; Computer Room Fire Protection</td>
</tr>
<tr>
<td></td>
<td>• Construction Begin for Oakland Yard fire Services</td>
<td></td>
<td>• Contract Award of Design for Concord Yard Turntable Replacement</td>
</tr>
</tbody>
</table>

Watchlist:

• Combining Gas Line Corrosion Assessment scope with Richmond Yard Fire Services
• Unforeseen site conditions for Concord Yard Fire Service

Italic: Modified milestones from previous report.
### Replace Train Control
#### STATUS & MILESTONES

- **EXPENDED Thru 10/2020:** $28.2
- **FORECAST Thru 9/2023:** $89
- **TOTAL PROGRAM VALUE:** $400
- **PERIOD CASHFLOW:** $0.9

#### STATUS – Replace Train Control / Increase Capacity

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>4</td>
<td>1</td>
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#### MILESTONES

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Notice to Proceed (NTP) for CBTC Construction Management Agreements</td>
<td>• Notice to Proceed for CBTC Design Build Contract/Mobilize</td>
<td>• Advertise Power Supply Cabinets &amp; Switch Machine/Train Control</td>
<td>• Complete CBTC Conceptual Design Review</td>
</tr>
<tr>
<td>• NTP for CBTC Design Support During Construction Agreements</td>
<td>• Start Conceptual Design for CBTC Design Build Contract</td>
<td>• Issue CBTC NTE Change Notice to Bombardier for Conceptual Design Review</td>
<td>• Start CBTC Preliminary Design Review</td>
</tr>
<tr>
<td>• Notice of Award &amp; Contract Execution for CBTC Design Build Contract/Mobilize</td>
<td>• Issue CBTC Change Notice for Cost Proposal to Bombardier for D-Car Retrofit Design</td>
<td>• Issue CBTC NTE Change Notice for Hitachi to bring Bombardier in as a Subcontractor for Preliminary Design, Final Design and for D-Car Retrofit implementation</td>
<td>• Open Bids - Power Supply Cabinets &amp; Switch Machine/Train Control</td>
</tr>
<tr>
<td>• OCIP Coverage/ Notice to Proceed for CBTC</td>
<td></td>
<td>• CBTC Baseline Schedule submitted and approved</td>
<td></td>
</tr>
</tbody>
</table>

#### Watchlist:

- None

*Italic: Modified milestones from previous report.*
## Renew Stations

### STATUS & MILESTONES

|----------------------|-------------------------------|-----------------------------|----------------------------|------------------------|

#### STATUS – Renew Stations

<table>
<thead>
<tr>
<th></th>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>6</td>
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### MILESTONES

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Completed for El Cerrito Del Norte:</strong></td>
<td><strong>Market St. Escalator Project - Perform factory inspection of escalators</strong></td>
<td><strong>Market St. Escalator Project - Begin installation of 2nd group of escalators</strong></td>
<td><strong>Begin modifications of existing stations in preparation for canopy construction</strong></td>
</tr>
<tr>
<td>• Fire water line</td>
<td>• Begin Hazmat abatement work for Powell St. Station Modernization</td>
<td>• Powell St. Station Modernization – Begin lighting improvements</td>
<td>• Southeast Escalator Commissioning &amp; Turnover completion for Union City Station Modernization</td>
</tr>
<tr>
<td>• 40kva emergency lighting UPS</td>
<td>• Complete 100% Design for Walnut Creek TOD North Stairs</td>
<td>• Substantial Completion for El Cerrito Del Norte</td>
<td>• Substantial Completion for El Cerrito Del Norte</td>
</tr>
<tr>
<td>• Construction of bus island, roadway, and associated amenities</td>
<td>• 19th St. Modernization – Complete construction of staircase modernization at 1 location</td>
<td>• Southeast Escalator Commissioning &amp; Turnover completion for Union City Station Modernization</td>
<td></td>
</tr>
<tr>
<td>• Market St. Escalator Project - Removed existing escalators in preparation for new equipment at 3 locations</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Watchlist:
- Funding Walnut Creek TOD North Stairs Construction

*Italic: Modified milestones from previous report.*
**Station Access**

**STATUS & MILESTONES**

EXPENDED Thru 10/2020: $19.5
FORECAST Thru 9/2023: $37
TOTAL PROGRAM VALUE: $135
PERIOD CASHFLOW: $1.3

### STATUS – Expand Safe Access to Stations

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>11</td>
<td>1</td>
<td>7</td>
<td>6</td>
<td>25</td>
</tr>
</tbody>
</table>

### MILESTONES

#### Completed

- Embarcadero and Civic Center Bike Station Modernization complete and closed out
- Safe Routes to BART Grant Program – Selected first 4 projects

#### Q2

(Nov 2020 – Dec 2020)
- Award and execute funding agreements with jurisdiction for Safe Routes to BART (SR2B) Grant Program
- Begin planning with BART forces for Bicycle Stair Channel project

#### Q3

(Jan 2021 – Mar 2021)
- Begin work with BART forces to construct the bicycle stair channels at seven stations
- Submit Accessibility Improvement (Phase 1) Bid Documents to Procurement to prepare for advertising
- Initiate Construction of the San Francisco 5th Street project (SR2B)

#### Q4

(Apr 2021 – Jun 2021)
- Substantial Completion for eBART Antioch Parking Lot Contract
- Advertise Accessibility Improvement (Phase 1)
- Construction Completion of the Warm Springs West Pedestrian Bridge and Plaza Project
- Initiate Construction of Pittsburg Center and Dublin/Pleasanton projects (SR2B)

**Italic:** Modified milestones from previous report.

**Watchlist:**
- None
## STATUS – Design / Engineer to Relieve Crowding

<table>
<thead>
<tr>
<th># Projects in Planning</th>
<th># Projects in Design</th>
<th># Projects in Bid/Award</th>
<th># Projects in Construction</th>
<th># Projects Completed</th>
<th>TOTAL # Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>9</td>
</tr>
</tbody>
</table>

### MILESTONES

<table>
<thead>
<tr>
<th>Completed</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
</table>

- **Completed**
  - Advertised contract for professional planning services to support the New Transbay Rail Crossing (NTRC) Program (Outreach & Engagement, Travel Demand & Land Use, Planning & Engineering, Environmental)
  - Awarded and NTP Hayward Maintenance Complex Phase 2: (Mainline) Trackwork Procurement
  - Advertised Hayward Maintenance Complex Phase 2: Civil/Grading

- **Q2**
  - Evaluate bids for Hayward Maintenance Complex Phase 2: Civil/Grading

- **Q3**
  - Award and NTP for Hayward Maintenance Complex Phase 2: Civil/Grading
  - Award and NTP for Hayward Maintenance Complex Phase 2: Trackwork Procurement
  - Evaluate Proposals for the NTRC Program
  - Begin Steel Erection for Civic Center Station Scissor Stairs
  - Complete Redesign for Embarcadero New Platform Elevator

- **Q4**
  - Award for contracts NTRC Program
  - Advertise Embarcadero New Platform Elevator

### Watchlist:

- Funding for Embarcadero Platform Elevator

**Italic:** Modified milestones from previous report.
Budget and Schedule Status
<table>
<thead>
<tr>
<th>Program</th>
<th>Expended (thru July 2020)</th>
<th>Expended (thru October 2020)</th>
<th>Period Cashflow (August 2020 - October 2020)</th>
<th>% Expended out of Total Bond Investment</th>
<th>Forecast Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SHORT-TERM (thru September 2023)</td>
</tr>
<tr>
<td>Renew Track</td>
<td>$201.2</td>
<td>$223.6</td>
<td>$22.4</td>
<td>36%</td>
<td>$382</td>
</tr>
<tr>
<td>Renew Power Infrastructure</td>
<td>$237.1</td>
<td>$258.6</td>
<td>$21.5</td>
<td>21%</td>
<td>$573</td>
</tr>
<tr>
<td>Repair Tunnels &amp; Structures</td>
<td>$54.9</td>
<td>$63.4</td>
<td>$8.5</td>
<td>11%</td>
<td>$136</td>
</tr>
<tr>
<td>Renew Mechanical</td>
<td>$30.3</td>
<td>$39.0</td>
<td>$8.7</td>
<td>29%</td>
<td>$77</td>
</tr>
<tr>
<td>Replace Train Control/Increase Capacity</td>
<td>$27.3</td>
<td>$28.2</td>
<td>$0.9</td>
<td>7%</td>
<td>$89</td>
</tr>
<tr>
<td>Renew Stations</td>
<td>$21.3</td>
<td>$24.0</td>
<td>$2.7</td>
<td>11%</td>
<td>$125</td>
</tr>
<tr>
<td>Expand Safe Access to Stations</td>
<td>$18.2</td>
<td>$19.5</td>
<td>$1.3</td>
<td>14%</td>
<td>$37</td>
</tr>
<tr>
<td>Design/Engineer to Relieve Crowding</td>
<td>$26.3</td>
<td>$33.5</td>
<td>$7.2</td>
<td>17%</td>
<td>$76</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$616.6</strong></td>
<td><strong>$689.8</strong></td>
<td><strong>$73.2</strong></td>
<td><strong>20%</strong></td>
<td><strong>$1,495</strong></td>
</tr>
</tbody>
</table>
RR Overall Program Budget Progress

BART Measure RR Program Spending
Actual vs. Forecast

- Forecast to Sept 2023: $1,495 M
- Actual by October 2020: $689.8 M
- Plan Spenddown Tranches
  - $1,360 M Cumulative: Mar 2023
# Earned Value Rollup by Program

<table>
<thead>
<tr>
<th>RR Program</th>
<th>Total RR Budget</th>
<th>Physical % Complete</th>
<th>Planned Value</th>
<th>Earned Value</th>
<th>RR Accrued to Date</th>
<th>CPI</th>
<th>SPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew Track</td>
<td>$625</td>
<td>42%</td>
<td>$258.31</td>
<td>$263.30</td>
<td>$262.51</td>
<td>1.00</td>
<td>1.02</td>
</tr>
<tr>
<td>Renew Power</td>
<td>$1,225</td>
<td>25%</td>
<td>$358.78</td>
<td>$304.35</td>
<td>$325.44</td>
<td>0.94</td>
<td>0.85</td>
</tr>
<tr>
<td>Repair Tunnels and Structures</td>
<td>$543</td>
<td>13%</td>
<td>$82.23</td>
<td>$68.97</td>
<td>$71.01</td>
<td>0.97</td>
<td>0.84</td>
</tr>
<tr>
<td>Renew Mechanical</td>
<td>$162</td>
<td>29%</td>
<td>$50.51</td>
<td>$47.00</td>
<td>$42.52</td>
<td>1.11</td>
<td>0.93</td>
</tr>
<tr>
<td>Replace Train Control/ Increase Capacity</td>
<td>$400</td>
<td>7%</td>
<td>$39.89</td>
<td>$29.10</td>
<td>$33.71</td>
<td>0.86</td>
<td>0.73</td>
</tr>
<tr>
<td>Renew Stations</td>
<td>$210</td>
<td>11%</td>
<td>$27.56</td>
<td>$22.20</td>
<td>$21.09</td>
<td>1.05</td>
<td>0.81</td>
</tr>
<tr>
<td>Expand Safe Access to Stations</td>
<td>$135</td>
<td>20%</td>
<td>$30.98</td>
<td>$26.80</td>
<td>$27.16</td>
<td>0.99</td>
<td>0.87</td>
</tr>
<tr>
<td>Design/Engineer to Relieve Crowding</td>
<td>$200</td>
<td>17%</td>
<td>$41.07</td>
<td>$34.19</td>
<td>$35.26</td>
<td>0.97</td>
<td>0.83</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$3,500</strong></td>
<td><strong>23%</strong></td>
<td><strong>$889.33</strong></td>
<td><strong>$795.91</strong></td>
<td><strong>$818.70</strong></td>
<td><strong>0.97</strong></td>
<td><strong>0.89</strong></td>
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</table>
# Track Program Drill Down

<table>
<thead>
<tr>
<th>Project</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Projects (&gt;25% Spent)</td>
<td>14</td>
</tr>
<tr>
<td>CPI &lt;0.9 or &gt;1.1</td>
<td>4</td>
</tr>
<tr>
<td>SPI &lt;0.9 or &gt;1.1</td>
<td>1</td>
</tr>
<tr>
<td>Number of Risk Register Updates Performed in Previous Period</td>
<td>5</td>
</tr>
<tr>
<td>Number of Project Quality Reviews Performed in Previous Period</td>
<td>26</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project</th>
<th>Physical % Complete</th>
<th>CPI</th>
<th>SPI</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>C25 Interlocking Replacement</td>
<td>92%</td>
<td>1.14</td>
<td>1.00</td>
<td>4 turnouts replaced; Construction cost less than planned</td>
</tr>
<tr>
<td>Replace Direct Fixation Pads</td>
<td>76%</td>
<td>1.16</td>
<td>2.15</td>
<td>44,120 pads replaced; Benefitting from extended blanket hours due to COVID-19 response</td>
</tr>
<tr>
<td>R65 Interlocking Replacement</td>
<td>39%</td>
<td>1.14</td>
<td>0.99</td>
<td>Realized design efficiencies</td>
</tr>
<tr>
<td>Switch Replacement</td>
<td>31%</td>
<td>0.84</td>
<td>0.97</td>
<td>Material cost exceeded plan. Expecting to recover cost through self performed work</td>
</tr>
</tbody>
</table>
## Power Program Drill Down

<table>
<thead>
<tr>
<th>Project</th>
<th>Physical % Complete</th>
<th>CPI</th>
<th>SPI</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transbay Tube Emergency Generator Generator</td>
<td>59%</td>
<td>0.86</td>
<td>0.78</td>
<td>Redesign due to unforeseen site conditions</td>
</tr>
<tr>
<td>M Line 34.5kV Cable Replacement</td>
<td>53%</td>
<td>1.18</td>
<td>1.02</td>
<td>6.7 mi of cable installed. Benefitting from extended blanket hours due to COVID-19 response</td>
</tr>
<tr>
<td>Train Control Room UPS Replacement</td>
<td>48%</td>
<td>1.60</td>
<td>0.79</td>
<td>Construction cost less than planned</td>
</tr>
<tr>
<td>K Line 34.5kV Cable Replacement</td>
<td>44%</td>
<td>0.91</td>
<td>0.69</td>
<td>Two circuits complete. Strategic resequencing of work. No impact to overall program</td>
</tr>
<tr>
<td>34.5kV Blocking Scheme</td>
<td>30%</td>
<td>0.79</td>
<td>0.45</td>
<td>Self-performing remaining design to reduce cost and recover schedule. Forecasted to be on budget. Schedule delay does not impact program</td>
</tr>
<tr>
<td>Cast Coil Transformer Replacement</td>
<td>29%</td>
<td>0.91</td>
<td>0.64</td>
<td>Rejected all bids. Review strategies to mitigate impacts to budget and schedule.</td>
</tr>
</tbody>
</table>
# Mechanical Program Drill Down

## Project Progress

<table>
<thead>
<tr>
<th>Project</th>
<th>Physical % Complete</th>
<th>CPI</th>
<th>SPI</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install L Line Wet Standpipe</td>
<td>99%</td>
<td>0.99</td>
<td>1.12</td>
<td>Schedule benefit from combining scope with Hayward Yard Fire Services</td>
</tr>
<tr>
<td>Install Access Ladders</td>
<td>87%</td>
<td>0.94</td>
<td>1.19</td>
<td>Benefitting from extended blanket hours due to COVID-19 response</td>
</tr>
<tr>
<td>Gas Lines Corrosion Assessment</td>
<td>65%</td>
<td>1.20</td>
<td>0.81</td>
<td>Combining project scopes to reduce cost</td>
</tr>
<tr>
<td>Richmond Yard Fire Services</td>
<td>64%</td>
<td>1.02</td>
<td>1.40</td>
<td>Benefitting from extended blanket hours due to COVID-19 response</td>
</tr>
<tr>
<td>Rotoclones Replacement (Wet Dust Collectors)</td>
<td>51%</td>
<td>1.04</td>
<td>0.78</td>
<td>Contractor delay</td>
</tr>
<tr>
<td>Replace Backflow Preventers</td>
<td>39%</td>
<td>1.21</td>
<td>0.86</td>
<td>No bidders. Self-performing to recover schedule</td>
</tr>
<tr>
<td>Vacuum Systems Replacement</td>
<td>29%</td>
<td>0.70</td>
<td>0.75</td>
<td>COVID delay</td>
</tr>
</tbody>
</table>

## Project Statistics

- **Number of Projects (>25% Spent):** 16
- **CPI <0.9 or >1.1:** 4
- **SPI <0.9 or >1.1:** 7
- **Number of Risk Register Updates Performed in Previous Period:** 4
- **Number of Project Quality Reviews Performed in Previous Period:** 8
Program Level Schedule Update

Future updates may include additional projects as programs mature.
Next Steps

• Ongoing Development:
  — East Bay Substation Repackaging for Bid
  — Manage resources as a result of the early retirement incentive

• Under Development
  — March 2021 Bond Oversight Meeting