



BART Transit-Oriented Development Program Work Plan: 2024 Update

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1. Introduction

The 2024 update to BART's Transit-Oriented Development Program Work Plan (TOD Work Plan) builds on the *2020 TOD Work Plan*, which can be found at the [BART Transit-Oriented Development website](#)¹. BART's intention is to update the TOD Work Plan roughly every four years. In the *2024 TOD Work Plan Update*, BART updates its TOD priorities for the next 10 years considering current conditions. Much has changed since the *2020 TOD Work Plan* was developed in 2019, particularly market conditions, the state's Housing Element enforcement, and BART's slow ridership recovery post-pandemic restrictions.

Market Conditions²

Construction Costs

High interest rates, high construction costs, and stagnating rents are creating unfavorable conditions for development and land transactions. Since 2017, interest rates have increased from 4.0% to 6.81% making access to capital more challenging.

Office Demand

Due to changes in travel patterns brought on by the COVID-19 pandemic and the greater prevalence of work from home, demand for new office construction in the Bay Area has declined substantially since 2019, as the following indicators demonstrate:

Vacancy rates for leased office space

The Bay Area's office vacancy rates have surged from 7% in 2019 to 19.6% in the third quarter of 2023. More location-specific data shows that office vacancies in the third quarter of 2023 were 13.6% in the East Bay (Alameda and Contra Costa counties), 26% in San Francisco, and 20% in San Mateo County.

Rent per square foot

In the East Bay, asking office rents declined between the fourth quarters of 2019 and 2020 but have been relatively stable since 2020, with landlords becoming more accommodating with concessions and other incentives for tenants. In contrast, average asking office rents in San Francisco have declined steadily by 23% between their peak in the second half of 2019 and the third quarter of 2023. Asking rents for office space in San Mateo County, an affordable submarket compared to San Francisco, are 15.7% lower in the third quarter of 2023 than they were in 2020.

Housing Demand

Demand for housing has generally remained more stable since 2019, as the following indicators for multi-family housing demonstrate:

Vacancy rates for apartments

Vacancies in 2019 were 5.6% in the East Bay (Alameda and Contra Costa counties), 5.7% in San Francisco County, and 6.3% in San Mateo County. Vacancies in the third quarter of 2023 were 7.3% in the East Bay (Alameda and Contra Costa counties), 6.7% in San Francisco County, and less than 6% in San Mateo County.

¹ Found at <https://www.bart.gov/about/business/tod>.

² CoStar Group, www.costar.com.

Rent per apartment:

Average residential rents in the third quarter of 2023 were \$2,410 in the East Bay, \$3,050 in San Francisco, and \$3,030 in San Mateo County. These rents were well-above the national average of \$1,670 for the same time period but represent an average year-over-year decrease between 2019 and the third quarter of 2023 in the East Bay (-1.0%) and San Francisco (-0.2%). San Mateo County, however, has seen an increase of 4% over the average rent from five years ago.

Result

Some sites that local jurisdictions and BART had primarily prioritized for job-generating development in the 2020 TOD Work Plan may either be reconsidered for housing or will be strategically preserved for non-residential development until demand rebounds.

Housing Element Enforcement³

California's housing crisis has grown as demand for shelter continues to exceed supply. State housing and funding policies have become more robust in response. The state has increased scrutiny of local Housing Elements including the viability of sites identified in their inventories and is taking further actions including lawsuits to ensure local jurisdictional compliance with the most recent Housing Element cycle. State funding programs for transportation, infrastructure, and housing now often require or consider a local jurisdiction's compliance with Housing Element law.

Result

Many cities and counties have identified BART-owned or operated land in the sites inventory of their 2023-2031 Housing Elements or plan to do so for the next cycle. However, due to capacity and funding constraints, only a limited number of projects can be advanced for development each year.

Slow Recovery of BART's Ridership⁴

BART ridership in January 2024 was 40% of pre-COVID ridership. More specifically, it was 38% for the average weekday, 47% for the average Saturday, and 73% for the average Sunday compared to pre-COVID 19 pandemic ridership. The durability of remote and hybrid work means that BART, which was built largely as a commuter transit system connecting suburban residents with urban job centers, has lost a significant portion of its core riders. In September 2023, BART shifted service to draw riders for non-commute trips.

Result

The impetus for BART to pursue its TOD program persists even as travel patterns continue to change and evolve.⁵ Development within a half-mile of BART stations will be crucial for increasing ridership. The frequency of residents, employees, and visitors using transit for a variety of trip purposes increases as the distance to that station decreases. One pre-pandemic

³ California's Housing and Community Development Housing Element website, <https://www.hcd.ca.gov/planning-and-community-development/housing-elements>, accessed September 28, 2023.

⁴ BART 12-month window ridership report (January 2024 update) found at <https://www.bart.gov/about/reports/ridership>, accessed February 2024.

⁵ Rowlands, DW and Tracy Hadden Loh, *Ensuring the Intertwined Post-pandemic Recoveries of Downtowns and Transit Systems*, Brookings Institution, August 8, 2023, accessed March 4, 2024 at <https://www.brookings.edu/articles/ensuring-the-intertwined-post-pandemic-recoveries-of-downtowns-and-transit-systems/>.

study of Bay Area transportation and land use found that TOD residents commute by transit five times more than the average worker in the same city and TOD office workers commute by transit 3.5 times more than workers in the surrounding region.⁶ Another study found that TOD residents living within 0.25 miles of a BART station use transit for work trips two times more than those living one to two miles away from BART.⁷

⁶ *Travel Characteristics of Transit-Oriented Development in California*, Final Report, January 2004, Lund, Hollie M, Robert Cervero, Richard W Willson, found at https://www.bart.gov/sites/default/files/docs/Travel_of_TOD.pdf.

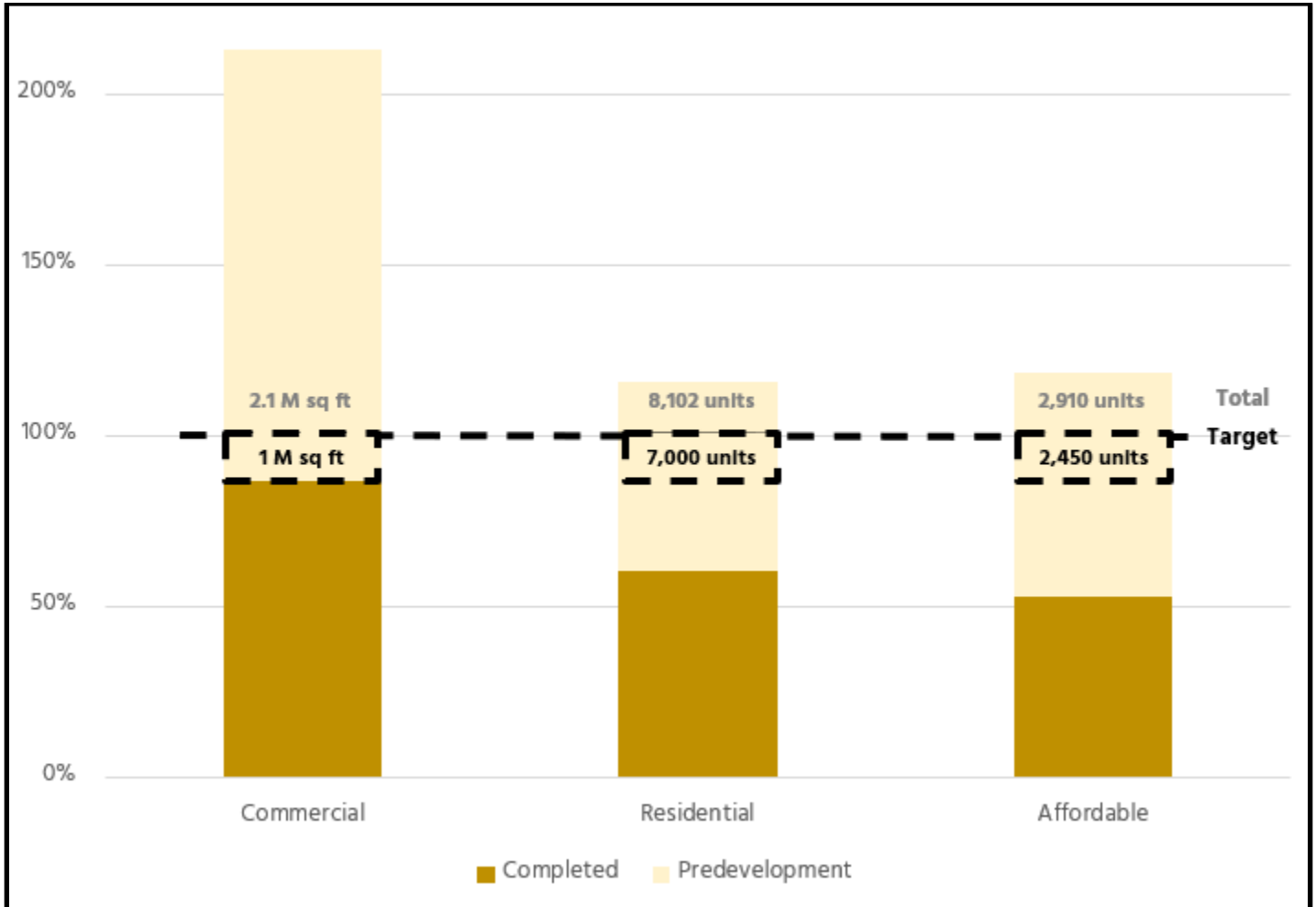
⁷ *Travel of TOD Residents in the San Francisco Bay Area: Examining the Impact of Affordable Housing*, June 30, 2020, Barajas, Jesus M, Karen Trapenberg Frick, Robert Cervero, found at <https://escholarship.org/uc/item/1r20w0tv>.

2. TOD Program Performance to Date

In 2016, the BART Board adopted ambitious performance goals for transit-oriented development, including completing 20,000 residential units and 4.5 million square feet of commercial space on BART property by 2040. The TOD Program continues to make progress towards these performance goals, albeit more slowly than hoped.

BART's 2025 interim performance targets are to complete 7,000 homes - of which 2,450 are affordable - and 1 million square feet of commercial space. As shown in Figure 1, projects currently in predevelopment are likely to eventually exceed these targets. However, BART does not anticipate that these will be completed by 2025 as they are not yet under construction.

Figure 1: Progress of BART's TOD Program Towards 2025 Performance Targets



Source: BART Property Development based on data through February 2024

Table 1 details the progress of BART's TOD Program by station in terms of commercial square feet, total residential units, and affordable residential units.

Table 1: Progress of BART's TOD Program by Station

Station (Phase)	Year Complete	Commercial Square Feet	Residential Units	
			Total	Affordable
Complete				
Castro Valley (Phase 1)	1993	0	96	96
Hayward (Phase 1)	1998	0	77	0
Fruitvale (Phase 1)	2004	64,000	47	10
Richmond (Phase 1)	2004	15,000	132	66
Dublin/ Pleasanton (Phase 1)	2008	0	240	0
Pleasant Hill/ CC Centre (Blocks A-B)	2008	35,590	422	84
Ashby (Phase 1-Ed Roberts)	2011	80,000	0	0
West Dublin/ Pleasanton (Ph 1-Dublin)	2013	0	309	0
South Hayward (Phase 1)	2017	0	357	150
Fruitvale (Phase 2A)	2018	0	94	92
Pleasant Hill/ CC Centre (Block C)	2018	0	200	0
Coliseum (Phase 1)	2019	0	110	55
MacArthur (Phases 1-2)	2019	33,000	475	90
San Leandro (Phases 1-2)	2019	6,000	200	200
West Dublin/ Pleasanton (Ph 2-Pleasanton)	2019	410,000	0	0
MacArthur (Phase 3)	2020	13,000	403	45
Balboa Park	2023	3,000	131	131
Millbrae	2023	195,000	400	100
Walnut Creek (Phase 2)	2023	14,000	358	0
Fruitvale (Phase 2B)	2024	6,000	181	179
Total Complete		874,590	4,232	1,298
Predevelopment¹				
El Cerrito Plaza		20,000	743	370
Lake Merritt (Blocks 1-2)		500,000	557	233
North Berkeley		7,000	750	260
Pleasant Hill/ CC Centre (Block D) ²		290,000	0	0
Richmond (Phase 2)		0	520	209
Walnut Creek (Phase 3)		12,000	238	0
West Dublin/ Pleasanton (Phase 3-Dublin)		0	300	300
West Oakland (Phase 1)		430,000	762	240
Total Predevelopment		1,259,000	3,870	1,612
Total		2,133,590	8,102	2,910

¹ Commercial square feet and number of residential units are approximate and subject to change.

² BART Board of Directors is considering a change of use to residential at the March 14, 2024, meeting.

Source: BART Property Development based on data through February 2024

Since 2020, construction of many TOD projects that were identified in the current pipeline of the *2020 TOD Work Plan* have been completed. They are:

- Balboa Park
- Fruitvale Phases 2A, 2B
- MacArthur Phase 3
- Millbrae
- Walnut Creek Phase 2
- West Dublin-Pleasanton Phase 2-Pleasanton

3. Analysis Approach for the 2024 TOD Work Plan Update

BART evaluated its developable sites using the most current market data from CoStar (a commercial real estate platform), BART's adopted policies and performance metrics, developable acreage, and input from staff at local jurisdictions and Metropolitan Transportation Commission (MTC) and Bay Area Housing Finance Authority (BAHFA) staff. Each relevant data point was categorized into one of four prioritization criteria: Market readiness, local support for TOD, infrastructure needs, and development capacity.

To gather information on local interest, conditions, and support for TOD development on BART-owned or operated land, BART staff engaged with staff from all 22 city and county jurisdictions with developable BART parcels under their land use authority. City and county staff completed a web survey in spring 2023. In summer 2023, BART staff interviewed staff from the 18 jurisdictions who responded to the survey with interest in advancing TOD in the next 10 years (representing 24 station areas). During the interviews, 16 jurisdictions representing 22 station areas affirmed their interest in advancing TOD in the next 10 years. BART staff assessed how closely each locality had aligned its regulations with relevant guidance and policies for BART, MTC, and the state for development and parking. For example, local alignment with BART's 2017 Transit-Oriented Development Guidelines (*TOD Guidelines*) was rated for each development site as part of this work plan's prioritization effort.

Additionally, BART met with MTC staff in fall 2023 regarding its Priority Sites Program and Transit-Oriented Communities (TOC) housing policies to align the TOD Work Plan with regional programs and priorities.

The following presents more detail about what was considered for each criterion. Appendix C: Evaluation Process for Prioritizing Development Sites provides analysis rankings for each site and will be included in the finalized *2024 TOD Work Plan Update*.

Market Readiness

- Streamlining – Status of:
 - Housing Element 2023-2031 as of September 28, 2023
 - Prohousing designation as of September 28, 2023
 - Locally adopted objective design standards
 - Adopted environmental impact report that includes the station area
 - Adopted zoning overlay or form-based code
- Access
 - Walk score from <https://www.walkscore.com/>
 - BART's station access typology found at <https://www.bart.gov/about/planning/policies>
- TOD Office Market
 - Analysis of CoStar (www.costar.com) data for the number of jobs within a ½ mile of the station area, gross office rents, and development trends
- TOD Residential Market
 - Analysis of CoStar data for effective rents per square foot for multi-family housing and development trends

Local Support for TOD

- Stated jurisdictional interest in development, per its staff input
 - Timeframe to begin presolicitation planning
 - Willingness to direct local funds to BART TOD

- Experience with Enhanced Infrastructure Financing Districts (EIFDs)
- Nomination for MTC’s Priority Sites pilot program's deadline of September 30, 2023
- Community plan
 - Status of a specific, precise, area, master plan that includes BART’s developable station land
- TOD zoning compliance
 - Locally adopted, permanent zoning that meets or exceeds standards identified in BART’s 2017 TOD Guidelines (<https://www.bart.gov/about/business/tod/guidelines>) for residential density, building height, and parking on BART’s land and within a half-mile of the station area
- Recent public outreach
 - Level of recent public outreach for planning efforts that include BART’s station land
- MTC TOC housing policy compliance
 - Adoption of two or more policies for each of the TOC categories for housing production, preservation, and tenant protection.

Infrastructure Needs

- BART station access and rider parking solutions
 - BART’s station access policy and typology (<https://www.bart.gov/about/planning/policies>)
 - Impact of TOD on BART rider parking, if any
 - Alignment between BART and local agency positions regarding on-site parking replacement levels
 - Potential for BART riders to pay for parking on-street, in public lots, and/or in public garages near the station
 - Local agency willingness to lead on other BART rider parking solutions
- Other physical infrastructure barriers
 - Other barriers to development and the local agency’s interest in leading solutions to overcome them

Development Capacity

- Each site's developable acreage and density factor (an assumption of the highest feasible level of residential density per acre given its context) are multiplied together to calculate dwelling unit equivalency as a metric. This factor is applied in an effort to maximize development output and resource efficiency.

Changes to the analysis approach

The *2024 TOD Work Plan Update* used the largely the same data sources and analysis methods as identified in the *2020 TOD Work Plan* except as identified below:

- **Market readiness for TOD:** The status of a jurisdiction’s [Housing Element](#) and its [Prohousing Designation](#) as of September 28, 2023 were included in the project streamlining sub-category.
- **Local support for TOD:** Additional elements were evaluated in the following sub-categories.
 - **Local interest in development:** Nomination of relevant land at stations for MTC's [Priority Sites](#) pilot program; identification of local funds that could support development on BART property; and, jurisdictional experience with implementing [EIFDs](#).

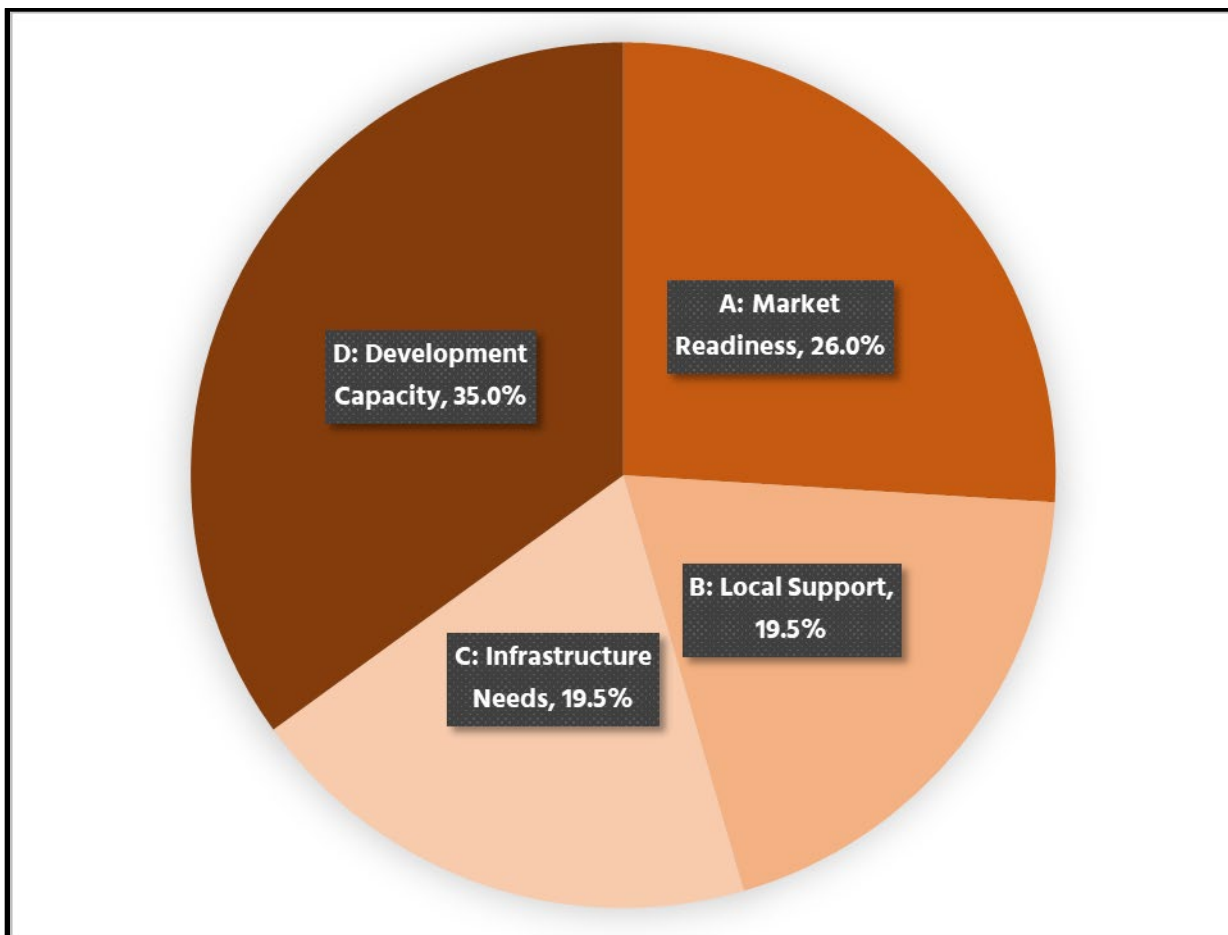
- **Transit-Oriented Communities Housing Policy Compliance:** Local jurisdictional compliance with MTC [Resolution 4530](#), the Transit-Oriented Communities Policy, which requires at least 2 locally adopted policies for affordable housing production, preservation, and tenant protection/anti-displacement.

Additionally, community plans that include BART station land were valued higher than recent public outreach.

- **Infrastructure needs:** This category added the consideration of the extent to which jurisdictions would consider and engage in parking solutions for BART riders on-street and in municipal facilities when development is contemplated on BART’s surface lots, as well as for other investments needed to maintain and expand multi-modal customer station access.
- **Development capacity:** Development capacity was used as a criterion to prioritize the station area by analyzing the developable acreage and expected floor area ratio. While the *2020 TOD Work Plan* included a summary of development capacity, the results were used qualitatively rather than quantitatively. The decision to quantify and use this as a criterion is to use BART staff resources most efficiently.

The result of including development capacity in the scoring leads to the weights for each criterion as shown in Figure 2.

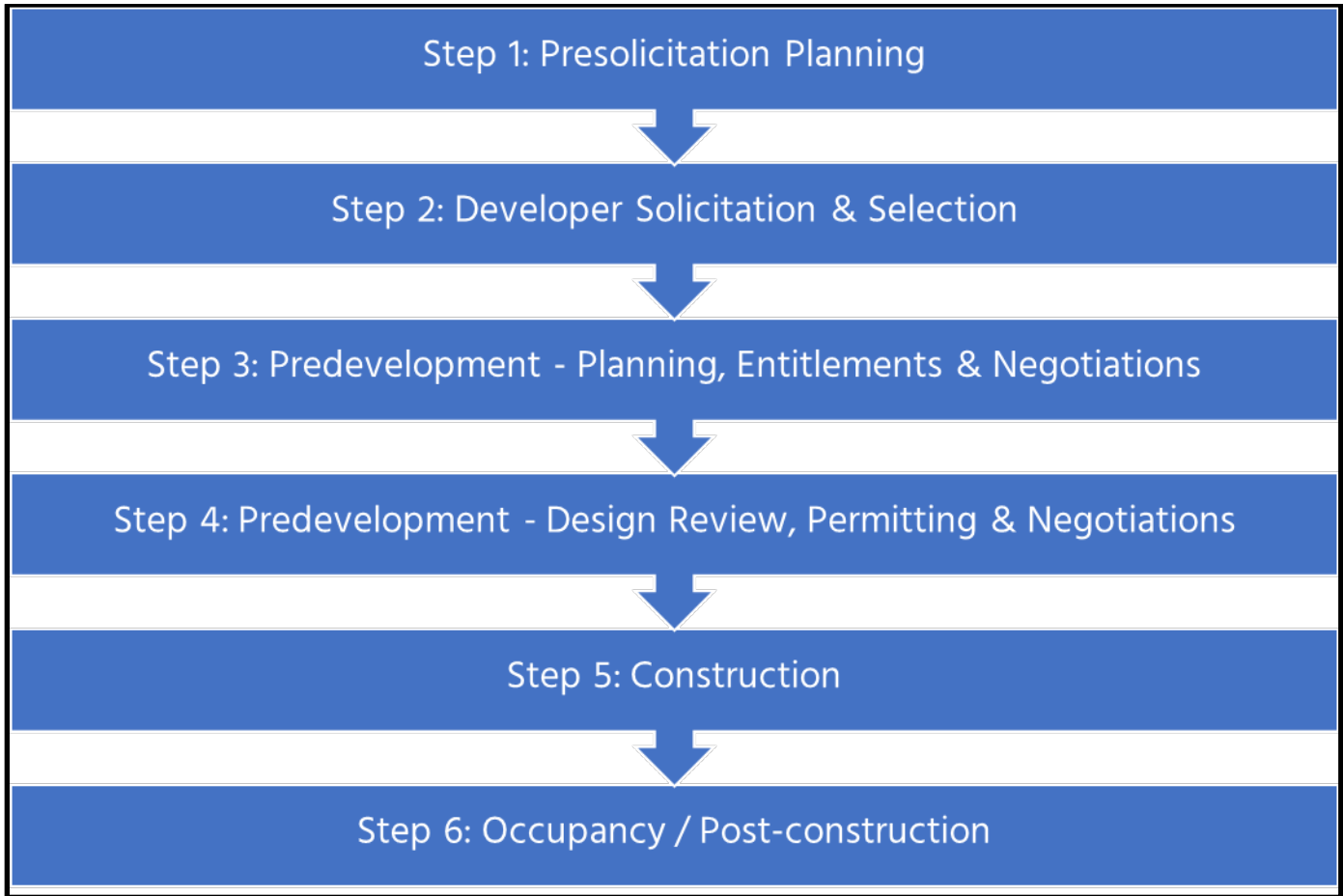
Figure 2: Analysis Criteria Weights



4. BART's Joint Development Process

Developing property in an operating transit environment has unique requirements. BART staff actively support all steps of the development process from early presolicitation planning through post-construction in a six-step process, as shown in Figure 3. These steps are described in detail in Appendix A.

Figure 3: BART's Six Step Joint Development Process



This Work Plan is focused on which sites BART would move a TOD project into **Step 2: Developer Solicitation and Selection**. Typically, this entails collaborating closely with local jurisdictions to prepare a developer solicitation in the form of a Request for Qualifications and/or Request for Proposals (RFQ/ RFP), rating the responses, and then selecting a development team.

Step 1: Presolicitation Planning is a formal collaboration between BART and local jurisdictions to bring a TOD project to Step 2: Developer Solicitation. However, there may be efforts that precede or are concurrent with Step 1, some of which may be led by BART (i.e., corridor-wide access plans) and others may be led by local jurisdictions (i.e., zoning or community visioning). TOD project partnerships are often formed established during these efforts such that BART serves as a stakeholder local jurisdictional planning and vice-versa.

BART staff will continue to engage with local jurisdictions on planning processes such as specific plans, community plans, access plans, etc., regardless of the status of the site in the TOD Work Plan. Such planning efforts are critical for preparing a site for future development and may advance the site in future TOD Work Plan updates.

BART staff actively engage in city- or county-led BART station-area planning efforts regardless of the TOD work plan's priorities.

Some examples include:

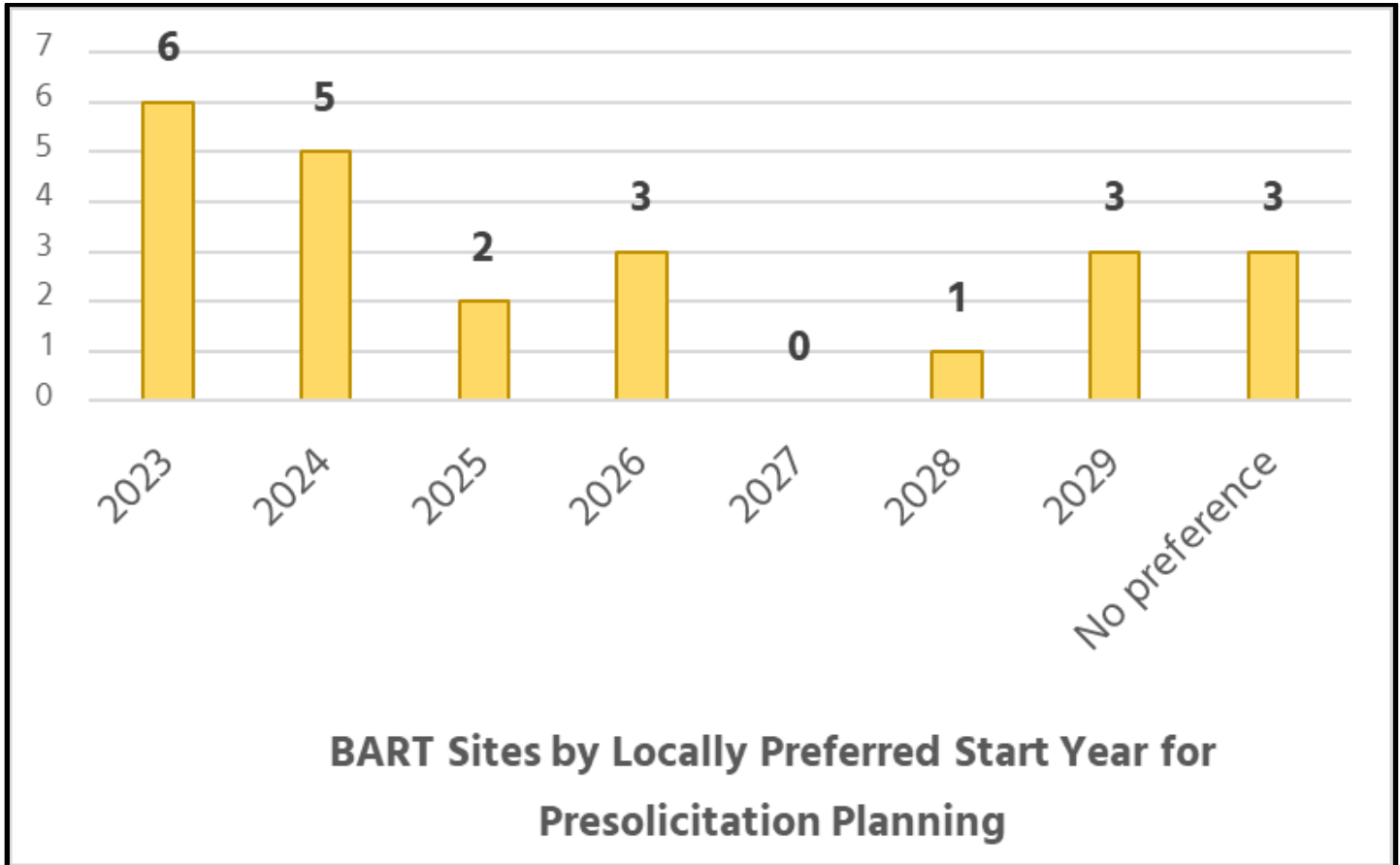
- ***Orinda BART:** Orinda's Priority Development Area grant from MTC*
- ***Bay Fair BART:** San Leandro's Priority Development Area grant from MTC*
- ***Lafayette BART:** Lafayette's Local Parking Management grant from MTC*

BART staff are also monitoring Concord's Community Reuse Project and Specific Plan for the former Naval Weapons Station, a major redevelopment effort adjacent to the North Concord BART station.

5. Local Preferences for TOD

Figure 4 summarizes local preference for each BART site, as stated by jurisdictional staff, about timing to formally start **Step 1: Presolicitation Planning** to get to **Step 2: Developer Solicitation and Selection** in BART's TOD process.

Figure 4: Jurisdictional Preference for Presolicitation Planning

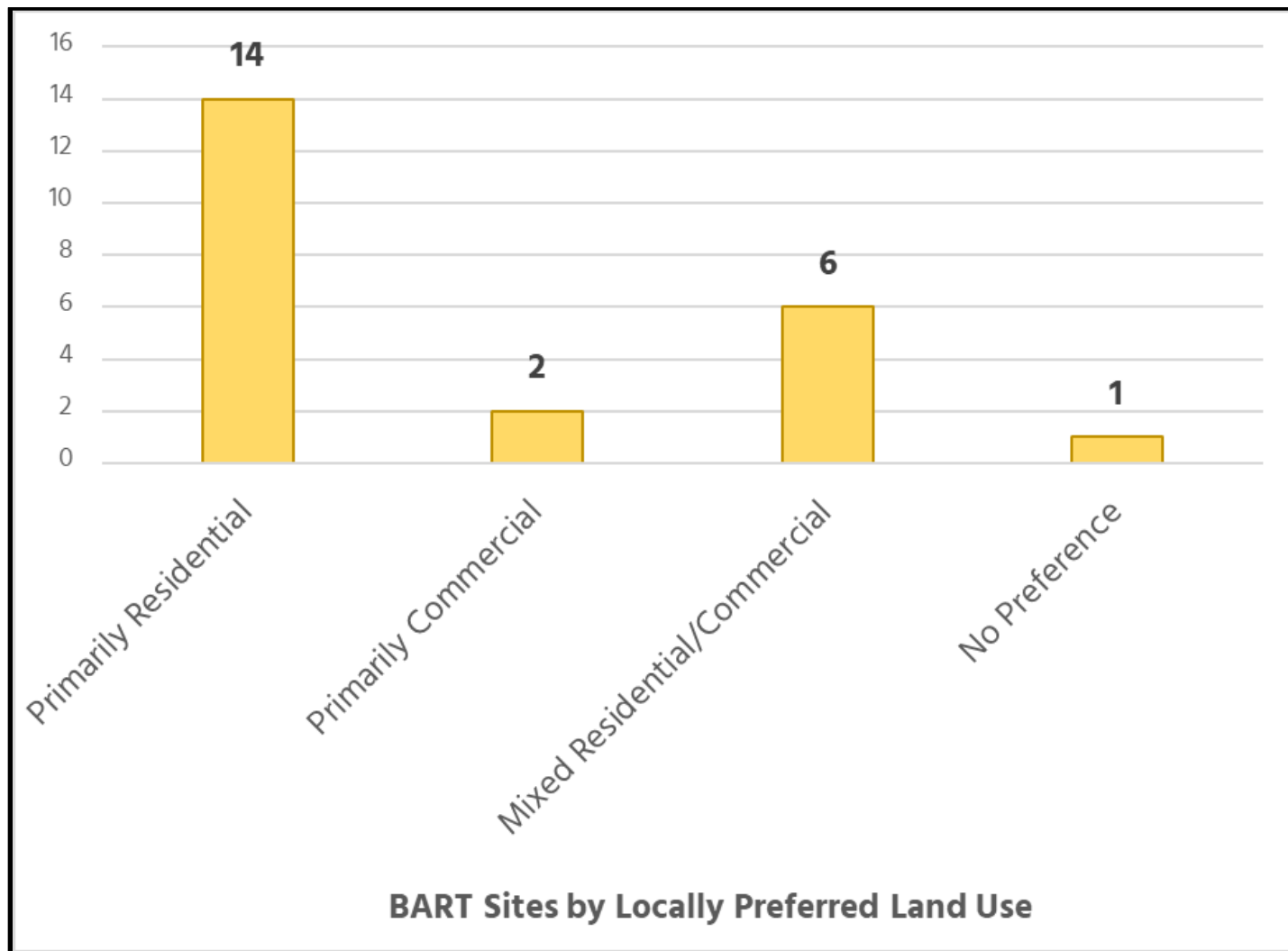


Source: TOD Work Plan Update survey and follow up meetings with jurisdictional staff, 2023-2024

Note: Bay Fair station area counted twice because San Leandro indicated a different year than Alameda County for parcels under their respective jurisdictions.

Figure 5 summarizes stated local preference by jurisdictional staff for the primary land use they propose to see for BART's TOD.

Figure 5: Jurisdictional Preference for Primary Land Use



Source: TOD Work Plan Update survey and follow up meetings with jurisdictional staff, 2023-2024

Note: Bay Fair station area counted twice because San Leandro indicated a different primary land use preference than Alameda County for parcels under their respective jurisdictions.

The 2020 TOD Work Plan determined that BART would reserve some sites for job-generating uses. BART is in the process of conducting its *A-Line Jobs Attraction Study*, which will be completed in fiscal year 2025, and will provide analysis of commercial development potential for all stations between Lake Merritt and Warm Springs/ South Fremont. Given the changing market, BART will use the results from this study to identify sites it will prioritize for job-generating uses along that line. The study may also reveal characteristics of suitable sites for job-generating uses that can be applied elsewhere in the BART District. This information, along with evolution in the shifting office market, will be reflected in the next TOD Work Plan update.

The 2020 TOD Work Plan also determined that BART would prioritize some sites for high levels of affordable housing. Those remain unchanged: Balboa Park (project completed in 2023), North Berkeley (in the current pipeline), Ashby (in presolicitation planning), Glen Park, Lafayette, MacArthur, and Rockridge stations.

6. BART's Development Priorities

BART's updated development timeframes are shown in Table 2: BART's Priorities for Advancing TOD Projects. It summarizes the status of stations in relation to Step 2: Developer Solicitation and Selection. Within each timeframe, stations are listed in alphabetical order. The current pipeline shows projects that have already gone through the developer solicitation process and have development teams selected. The remaining timeframes of near-term (2024-2028), mid-term (2029-2033), and long-term (2034 or later) indicate when BART expects to advance projects to RFQ/ RFP and developer selection. The number and timing of projects are based on BART's current staffing levels, which enable advancing about one to two new TOD projects each year.

In assessing station sites for TOD, BART assumed that staff of localities will engage robustly and align priorities with BART to ensure TODs advance smoothly and rapidly, making efficient use of BART's staffing and resources. These development priorities are based on information gathered and data analyzed at a point in time. Priorities may shift as realities that affect development potential at each station become clearer. BART expects to update the TOD Work Plan in another four years' time.

Table 2: BART's Timeframe to Advance to Developer Solicitation (RFQ/RFP)

Timeframe	Strategy	Stations (Project Phase or Description) ¹	
Current Pipeline (Post RFQ/ RFP)	Advance TOD projects already underway: BART has eight high-profile projects that have a development team already selected. Staff will focus time on completing them to help meet its 2040 performance targets.	El Cerrito Plaza	Richmond (Phase 2)
		Lake Merritt (Blocks 1-2)	Walnut Creek (Phase 3)
		North Berkeley	West Dublin/ Pleasanton (Phase 3)
		Pleasant Hill/ Contra Costa Centre (Block D)	West Oakland (Phase 1)
Near-term (Advance to RFQ/ RFP in 2024-2028 timeframe)	Deliver TOD projects that fulfill BART's performance targets. Building more homes is needed to meet BART's 2040 performance targets for affordable and market-rate housing. BART will consider opportunities for projects that promote ridership and fulfill its performance targets for commercial square feet.	Ashby (Phase 2)	Fremont
		Bay Fair	Hayward (Phase 2)
		El Cerrito del Norte	
Mid-term (Advance to RFQ/ RFP in 2029-2033 timeframe)	Support jurisdictions as they engage in presolicitation efforts. These station sites currently have some implementation, local support, and/or market barriers, but may be ready for housing and/or commercial development in the mid-term.	Coliseum (Phase 2)	Pittsburg/ Bay Point
		Concord (Phase 1-Monument)	South Hayward (Phase 2)
		Dublin/ Pleasanton (Phase 2- Pleasanton)	Union City
		Lafayette	Warm Springs/ South Fremont

Timeframe	Strategy	Stations (Project Phase or Description) ¹	
Long-term (Potential to advance to RFQ/ RFP 2034 or later)	Work with jurisdictions on their development strategy. Local staff indicated interest in developer solicitation and selection at BART sites before 2034, but significant market, local support, and/or implementation barriers must be overcome before BART can pursue development. Some parcels may be appropriate for assembly in developments initiated by a party other than BART.	Castro Valley (Phase 2)	Orinda ²
	Daly City (San Francisco & Daly City parcels)	Pittsburg Center	
	Fruitvale (Phase 3-Derby lot)	Rockridge	
	Glen Park	South San Francisco	
	North Concord		
	Assess implementation, local support, and market barriers in the future. These station sites represent areas with significant market, local support, and/or implementation barriers. BART will revisit conditions for development at these sites in the next TOD Work Plan update. Some parcels may be appropriate for assembly in developments initiated by a party other than BART.	12th St/ Oakland City Center	Lake Merritt (Block 3-isolated parcel)
	19th St/ Oakland	MacArthur (Phase 4-west of SR-24)	
	Antioch	Richmond (Phase 3-bus intermodal)	
	Concord (Phase 2-parking lots)	San Leandro (Phase 3-parking lots)	
	Dublin/ Pleasanton (Phase 3-Dublin)	West Oakland (Phase 2-isolated parcel)	
	Fruitvale (Phase 4-bus intermodal)		

¹ Listed in alphabetical order within each timeframe, not in order of priority

² BART operates and maintains rider parking but does not own the land

As discussed above, BART will engage in locally initiated planning efforts that ready sites for future development in advance of the timeframes shown in Table 2.

Table 3, Table 4, and Table 5 detail the actions needed and considerations for TOD projects prioritized for near-term, mid-term, and long-term implementation, respectively. The stations and timeline for initiating **Step 2: Developer Solicitation & Selection** indicated in these exhibits were identified by cities and counties as BART TOD projects they would like to advance within the next 10 years. As indicated previously, priorities may shift as realities that affect development potential at each station become clearer.

Additionally, agencies other than BART may initiate projects on BART-owned or and/or operated land. Examples include city-led redevelopment projects that may include BART-owned land as a portion or an agency repurposing land they own that is currently being used for BART rider parking for development. It is important to note that the Valley Transportation Authority owns and operates BART station areas in Santa Clara County for which they have their own TOD priorities. The San Mateo County Transit District (SamTrans) owns land where BART riders park near the Colma and South San Francisco BART stations.

Table 3: Near-Term TOD Projects (2024-2028) with Actions Needed and Considerations

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Ashby (Phase 2)	Berkeley: Draft Objective Design Standards to inform developer solicitation.
Bay Fair	<p>Alameda County: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>San Leandro-Alameda County: Coordinate with property owners to provide additional flood control channel crossings for pedestrians and cyclists.</p> <p>Alameda County-San Leandro: Facilitate and/or implement BART rider parking solutions with Bay Fair mall owners and the neighborhoods.</p> <p>BART: Coordinate with Union Pacific Railroad to develop solutions that remove barriers to station access.</p> <p>Alameda CTC-BART-San Leandro-Alameda County: Collaborate to design and implement the East Bay Greenway so that it maintains and/or enhances the feasibility of BART's TOD.</p> <p>BART: Determine how development potential might be affected by service changes envisioned in <i>BART Metro: 2030 and Beyond</i> summary report.</p>
El Cerrito del Norte	<p>El Cerrito-BART-Bus Operators: Collaborate to conceptualize any changes to the bus intermodal facility currently on-site.</p> <p>Note: No underground facilities possible due to high water table.</p> <p>Note: City does not expect in BART rider replacement of surface parking lots (existing BART garage on-site), but replacement decision will need to consider communities in the larger station catchment area to the north.</p> <p>Note: Permanent BART Police substation needed for Richmond-Line stations.</p>

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Fremont	<p>Fremont: Nominate BART site for MTC's Priority Sites Program.</p> <p>Fremont-BART-Bus Operators: Collaborate to conceptualize any changes to the bus intermodal facility currently on-site.</p> <p>Note: City is willing to have more units than identified in Housing Element.</p> <p>Note: Parking demand at this station has changed due to Warm Springs/ South Fremont and Berryessa extensions.</p> <p>Note: Hayward Fault may affect development potential.</p>
Hayward (Phase 2)	<p>Hayward-BART: Identify desired land use mix that is feasible, supports BART ridership, and meets city goals.</p> <p>Alameda CTC-BART-Hayward: Collaborate to design and implement the East Bay Greenway so that it maintains and/or enhances the feasibility of BART's TOD.</p> <p>Note: City does not expect in BART rider replacement parking due to existing BART garage on-site.</p> <p>Note: City has expressed interest in mixed-use, with active commercial ground-floor uses; potential to interface with uses related to higher education.</p>

Note: Listed in alphabetical order, not in order of priority

Table 4: Mid-Term TOD Projects (2029-2033) with Actions Needed and Considerations

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Coliseum (Phase 2)	<p>Oakland: Identify local funding for affordable housing.</p> <p>Oakland: Identify viable retail and service uses for inclusion in future development.</p> <p>Oakland: Develop economically feasible strategy for redevelopment of adjacent Coliseum Stadium and Arena complex.</p> <p>Oakland-BART: Resolve ownership of vacated roads between parcels.</p> <p>Alameda CTC-BART-Oakland: Collaborate to design and implement the East Bay Greenway so that it maintains and enhances the feasibility of BART's TOD.</p>
Concord (Phase 1- Monument)	<p>Concord: Coordinate with Contra Costa County's Flood Control and Water Conservation District to identify channel crossing opportunities within site.</p> <p>Concord-BART: Coordinate with PG&E to address utility poles and wires along San Miguel Rd.</p> <p>Note: No existing BART rider parking on-site, and none is needed.</p> <p>Note: Alquist Priolo Fault may affect development potential.</p>
Dublin/ Pleasanton (Phase 2- Pleasanton)	<p>Pleasanton: Coordinate with the Alameda County Flood Control District to provide additional channel crossings for pedestrians and cyclists.</p> <p>BART-Pleasanton-Bus Operators: Collaborate on implementing the Iron Horse Trail project that will improve walking and biking access and will relocate the bus intermodal to the east side.</p> <p>Pleasanton: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD considering Alameda County's new commuter parking garage set to open summer 2024 in Dublin.</p> <p>BART-Pleasanton: Coordinate with the Tri-Valley/San Joaquin Valley Regional Rail Authority to identify needs for the future Valley Link Project and their impact on the feasibility of BART's TOD.</p>

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Lafayette	<p>Lafayette: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Lafayette: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>BART: Determine termination value for parking lot solar panels if TOD is implemented in 2038 or earlier and consider including zero-emission energy generation options within the TOD.</p> <p>Note: City intends to include BART station land in the 2032-2040 Housing Element sites inventory.</p>
Pittsburg/ Bay Point	<p>Pittsburg: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>Pittsburg: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p>
South Hayward (Phase 2)	<p>Hayward: Work with Union Pacific Railroad to improve east-west walking and biking connections to the BART station.</p> <p>Alameda CTC-BART-Hayward: Collaborate to design and implement the East Bay Greenway so that it maintains and/or enhances the feasibility of BART's TOD.</p> <p>Note: Community has expressed interest in a grocery store in the station area.</p>
Union City	<p>Union City: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Note: City has stated an interest in office, but market would need to strengthen before pursuing office development.</p> <p>Note: City intends to develop their public lots near the station that have served as BART overflow parking in the past.</p>
Warm Springs/ South Fremont	<p>Fremont: Nominate BART site for MTC's Priority Sites Program.</p> <p>Fremont: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Fremont-BART: Collaborate to determine the mix and types of uses that support transit while serving the local community.</p> <p>BART: Determine termination value for parking lot solar panels if TOD is implemented in 2037 or earlier and consider including zero-emission energy generation options within the TOD.</p> <p>Note: Hayward Fault may affect development potential.</p> <p>Note: City prefers commercial but is open to housing.</p>

Note: Listed in alphabetical order, not in order of priority

Table 5: Long-Term TOD Projects (2034 and Beyond) with Actions Needed and Considerations

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Castro Valley (Phase 2)	<p>Alameda County: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>Alameda County: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p>
Daly City	<p>Daly City: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Daly City: Lead talks with San Francisco to coordinate zoning and environmental clearance efforts for the western parcels, which are in the jurisdiction of both cities.</p> <p>Daly City: Permanently rezone BART land per BART's 2017 TOD Guidelines.</p> <p>San Francisco: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>BART-Daly City-Bus Operators: Collaborate to conceptualize any changes to the bus intermodal facility currently on-site.</p>
Fruitvale (Phase 3-Derby)	<p>Oakland: Identify local funding for affordable housing.</p> <p>Oakland: Lead a community plan (specific, precise, area, or master plan) that prepares site for development.</p> <p>Alameda CTC-BART-Oakland: Collaborate to design and implement the East Bay Greenway so that it maintains and enhances the feasibility of BART's TOD.</p>
Glen Park	<p>San Francisco-BART: Collaborate to work with the San Francisco Public Utilities Commission on their easement and site development potential.</p> <p>BART: Determine development feasibility given rail zone of influence and existing easements.</p> <p>San Francisco: Lead a community process to prepare site for development, if determined feasible by BART.</p> <p>Note: City does not expect BART rider replacement parking on-site due to the parcel sizes and low number of spaces.</p>
North Concord	<p>Concord: Finalize master plan for the former Naval Weapons Station.</p> <p>Concord-BART: Include BART developable land in the Specific Plan process to maintain or enhance feasibility of BART's TOD.</p> <p>Concord: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Concord: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>Concord: Develop a timeline for infrastructure delivery serving BART's TOD.</p>

Station (Project Phase)	Actions Needed or Considerations for Advancing to Step 2: Developer Solicitation and Selection (RFQ/ RFP)
Orinda	<p>Orinda: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Orinda: Permanently rezone BART land per BART's 2017 TOD Guidelines.</p> <p>Orinda-BART: Work with Caltrans and PG&E to remove physical and institutional barriers and enable BART TOD.</p> <p>Note: City intends to include BART station land in the 2032-2040 Housing Element sites inventory.</p> <p>Note: Land is owned by Caltrans and operated by BART through a joint use maintenance agreement.</p>
Pittsburg Center	<p>Pittsburg: Permanently rezone BART land per BART's 2017 TOD Guidelines and to fully conform with AB 2923.</p> <p>Pittsburg: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p> <p>Pittsburg-BART: Collaborate on opportunities for land assembly to maintain and enhance the feasibility of BART's TOD.</p> <p>Note: City does not expect BART rider replacement parking on-site due to the parcel sizes and low number of spaces.</p>
Rockridge	<p>BART: Determine development feasibility given rail zone of influence, existing easements, local regulatory requirements, and underground creek location.</p> <p>Oakland: Identify local funding for affordable housing.</p> <p>Note: City does not expect BART rider replacement parking on-site as most existing spaces would be unaffected by development.</p>
South San Francisco	<p>South San Francisco: Facilitate and/or implement BART rider parking solutions that enhance feasibility of BART's TOD.</p>

Note: Listed in alphabetical order, not in order of priority

Table 6 shows stations and their phases that were not identified by local jurisdictions as TODs they prioritize for development within the next 10 years. However, BART is maintaining these parcels as potential TOD projects and may assess their development potential in the next TOD Work Plan.

Table 6: Long-Term TOD Projects (2034 and Beyond) for Other Stations and Phases¹

Station (Project Phase or Description) ¹	
12th Street/ Oakland City Center (parcel near 4th St & Washington St)	Lake Merritt (Phase 2-isolated parcel)
19th Street/ Oakland (parcel near W Grand Ave & Telegraph Ave)	MacArthur (Phase 4-west of SR-24)
Antioch	Richmond (Phase 3-bus intermodal)
Concord (Phase 2-parking lots)	San Leandro (Phase 3-parking lots)
Dublin/Pleasanton (Phase 3-Dublin)	West Oakland (Phase 2-isolated parcel)
Fruitvale (Phase 4-Bus intermodal)	

¹ No local preference indicated for presolicitation to begin within next ten years

Appendix B shows future TOD projects the *2024 TOD Work Plan Update* compared to its developer solicitation timeline in the *2020 TOD Work Plan*.

Appendix A: BART's Six Step Joint Development Process

Step 1: Presolicitation Planning

- Work with jurisdiction(s) and community to set site goals and objectives, including affordable housing, neighborhood-serving uses, and other similar requirements.
- Understand the real estate market dynamics.
- Consider BART and customer needs.

Step 2: Developer Solicitation & Selection

- Run a competitive process to select a site developer, making room for BART priorities such as affordable housing, small business, and labor practices.
- Ensure developer is a good fit with the goals and objectives of the site.

Step 3: Predevelopment - Planning, Entitlements & Negotiations

- Work with developer on community engagement plan.
- Identify design parameters for developer to ensure BART operations and safety are not compromised.
- Review early development concepts to ensure project meets community-vetted goals and objectives.
- Complete initial work to identify access investments.
- Support developer in securing entitlements and grants.
- Negotiate deal terms and execute all agreements conferring development rights to the property.

Step 4: Predevelopment - Design Review & Permitting & Negotiations

- Review design documents at all stages and ensure there are not operational, structural, or safety hazards affecting BART operations.
- Work with developer on a construction phasing plan that ensures the station is fully operational as the project gets built.
- Coordinate with the jurisdiction's building departments to set up construction oversight and public safety needs.

Step 5: Construction

- Communicate with BART passengers about construction impacts from TOD.
- Ensure adequate signage and wayfinding is in place to create more seamless passenger experiences.
- Coordinate with jurisdiction(s) on construction oversight to minimize impacts to passengers.

Step 6: Occupancy/ Post-construction

- Ongoing implementation and monitoring of real estate agreements.
- Ensure TOD design works as planned for BART and BART passengers.

Appendix B: Development Timeframe Comparison

Station (Phase or description)	2020 Work Plan		2024 Update		Timeline Change	Notes
	Timeframe	Years	Timeframe	Years		
Ashby (Ph 2)	Near-term	2020-2025	Near-term	2024-2028	None	
Bay Fair	Mid-term	2025-2030	Near-term	2024-2028	Progressed	
El Cerrito del Norte	Mid-term	2025-2030	Near-term	2024-2028	Progressed	
Fremont	Long-term	Beyond 2030	Near-term	2024-2028	Progressed	
Hayward	Near-term	2020-2025	Near-term	2024-2028	None	
Coliseum (Ph 2)	Mid-term	2025-2030	Mid-term	2029-2033	None	
Concord (Ph 1: Monument)	Mid-term	2025-2030	Mid-term	2029-2033	None	
Dublin/Pleasanton (Ph 2: Pleasanton)	Mid-term	2025-2030	Mid-term	2029-2033	None	
Lafayette	Long-term	Beyond 2030	Mid-term	2029-2032	Progressed	
Pittsburg/ Bay Point	Mid-term	2025-2030	Mid-term	2029-2033	None	Development barriers due to parking infrastructure and zoning
South Hayward (Ph 2)	Mid-term	2025-2030	Mid-term	2029-2033	None	
Union City	Mid-term	2025-2030	Mid-term	2029-2033	None	
Warm Springs/ South Fremont	Near-term	2020-2025	Mid-term	2029-2033	Fallen back	Local preference for industrial uses may not align with uses that support transit ridership
12th St/ Oakland City Center (APN 001-0131-008-01)	Long-term	Beyond 2030	Long-term	2034 or later	None	No local agency interest expressed for presolicitation planning to begin within next 10 years
19th St/ Oakland (APN 008-0660-052-03)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years
Antioch	Long-term	Beyond 2030	Long-term	2034 or later	None	No local agency interest expressed for presolicitation planning to begin within next 10 years
Castro Valley (Ph 2)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	Development barriers due to parking infrastructure and zoning
Concord (Ph 2: Parking lots)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years

Station (Phase or description)	2020 Work Plan		2024 Update		Timeline Change	Notes
	Timeframe	Years	Timeframe	Years		
Daly City (SF and Daly City parcels)	Long-term	Beyond 2030	Long-term	2034 or later	None	
Dublin/Pleasanton (Ph 3: Dublin)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years
Fruitvale (Ph 3: Derby)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	Development barriers due to lack of community plan and affordable housing funding.
Fruitvale (Ph 4: Bus intermodal)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years
Glen Park	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	Barriers due development capacity, easements, and financial feasibility
Lake Merritt (APN 001-0167-003-00)	Long-term	N/A	Long-term	2034 or later	None	No local agency interest expressed for presolicitation planning to begin within next 10 years
MacArthur (Ph 4: Parcels west of SR-24)	Near-term	2020-2025	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years
North Concord	Current pipeline	Before 2020	Long-term	2034 or later	Fallen back	Lack of infrastructure to serve TOD and delay in master planning
Orinda	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	Development barriers due to property ownership (Caltrans) and utilities (PG&E)
Pittsburg Center	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	Barriers due to zoning and development capacity
Richmond (Ph 3: Bus intermodal)	Long-term	Beyond 2030	Long-term	2034 or later	None	No local agency interest expressed for presolicitation planning to begin within next 10 years
Rockridge	Near-term	2020-2025	Long-term	2034 or later	Fallen back	Barriers due to development capacity and easements
San Leandro (Ph 3: Parking lots)	Mid-term	2025-2030	Long-term	2034 or later	Fallen back	No local agency interest expressed for presolicitation planning to begin within next 10 years
South San Francisco	Long-term	Beyond 2030	Long-term	2034 or later	None	
West Oakland (APN 004-0073-009-00)	Long-term	N/A	Long-term	2034 or later	None	No local agency interest expressed for presolicitation planning to begin within next 10 years

Appendix C: Evaluation Process for Prioritizing Development Sites

This appendix will be included in the finalized *2024 TOD Work Plan Update*.