CALTRAIN CAPITAL IMPROVEMENT PLAN (CIP) DEVELOPMENT

TOPS Committee

Agenda item 7

July 26, 2023

AGENDA

- Progress update
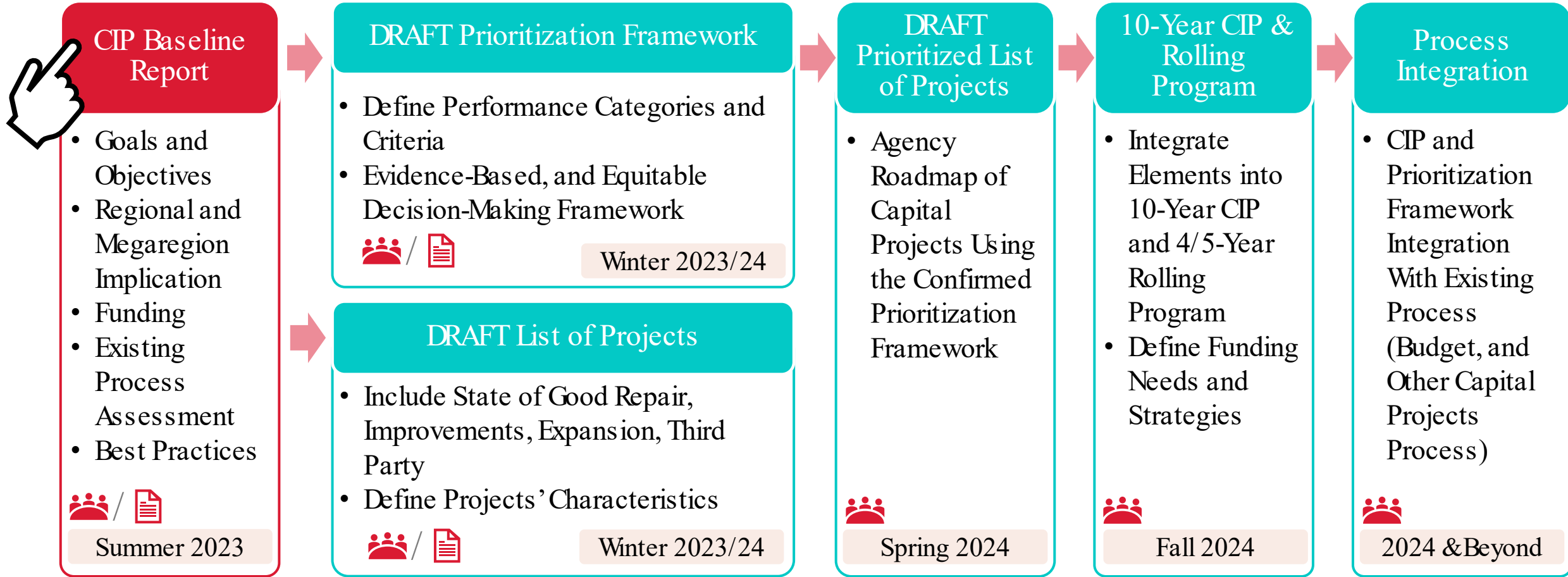- Review of the CIP Baseline Report, the effort's first deliverable
- Next Steps

Progress update

✓ CIP Baseline Report drafted

✓ Continuing review of peer CIP practices

✓ Transitioning to next project phase: Prioritization Framework & List of Projects

✓ Engaging stakeholders

- Regular TOPS Committee updates
- Monthly Caltrain Executive Director check-ins
- Regular CIP Executive Steering Committee and CIP Internal Stakeholder Group meetings
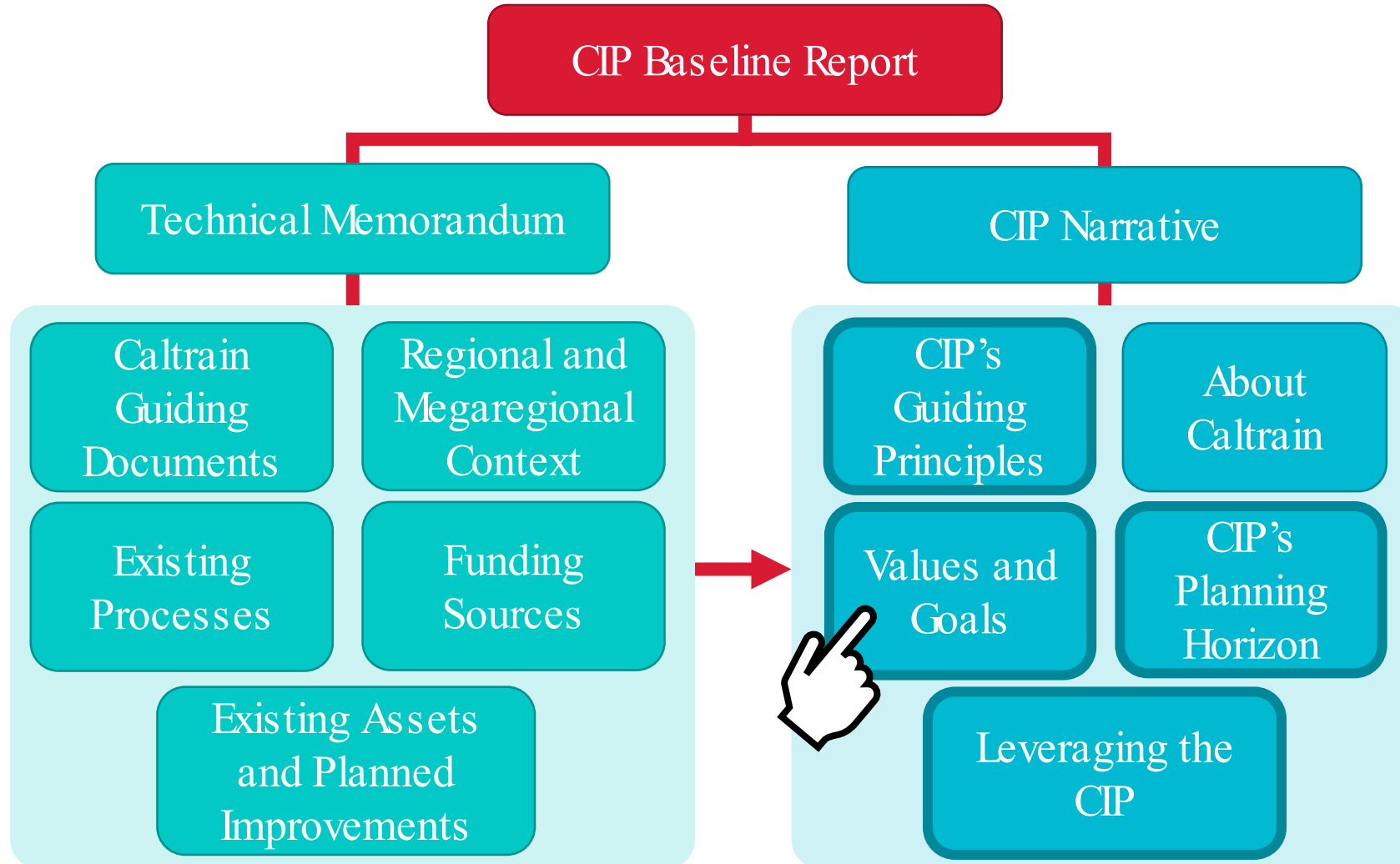
Delivery of key products

CIP Baseline Report

- Goals and Objectives
- Regional and Megaregion Implication
- Funding
- Existing Process Assessment
- Best Practices

👥 / 📄

Summer 2023

DRAFT Prioritization Framework

- Define Performance Categories and Criteria
- Evidence-Based, and Equitable Decision-Making Framework

👥 / 📄

Winter 2023/24

DRAFT List of Projects

- Include State of Good Repair, Improvements, Expansion, Third Party
- Define Projects' Characteristics

👥 / 📄

Winter 2023/24

DRAFT Prioritized List of Projects

- Agency Roadmap of Capital Projects Using the Confirmed Prioritization Framework

👥

Spring 2024

10-Year CIP & Rolling Program

- Integrate Elements into 10-Year CIP and 4/5-Year Rolling Program
- Define Funding Needs and Strategies

👥

Fall 2024

Process Integration

- CIP and Prioritization Framework Integration With Existing Process (Budget, and Other Capital Projects Process)

👥

2024 & Beyond

👥 Stakeholder Inputs and Collaboration

📄 Review Existing Documents

What does the CIP Baseline Report include?

CIP Baseline Report

Technical Memorandum
- Caltrain Guiding Documents
- Regional and Megaregional Context
- Existing Processes
- Funding Sources
- Existing Assets and Planned Improvements

CIP Narrative
- CIP's Guiding Principles
- About Caltrain
- Values and Goals
- CIP's Planning Horizon
- Leveraging the CIP

CIP Guiding Principles

Guiding Principles

Stability for Caltrain's financial future during a period of scarce resources

Ownership through a shared vision amongst stakeholders on Caltrain's priorities for capital investments

Efficiency through streamlined processes for the lifecycle of capital projects

Transparency through centralized actionable strategy that supports a robust evaluation of tradeoffs by Caltrain leadership

Accountability for management of funds and capital investments in alignment with Caltrain's values and goals

Capacity building through clear understanding of Caltrain's capital investments needed to serve the region

Values
Goals

Safety
Safety First and Always. Caltrain prioritizes safety for employees, riders, and communities served.

Customer Experience
Caltrain provides comfortable, reliable, on-time, safe, and diverse service meeting riders' needs.

Growth
Caltrain's growth involves anticipating, advancing and accelerating the delivery of the Long-Range Service Vision.

Equity
Caltrain ensures equal access to opportunities, fair distribution of impacts, and addresses historical impacts.

Accessibility
Building an inclusive Caltrain by integrating access for underserved communities and riders of all abilities.

Sustainability
Sustainability integrated throughout project lifecycle for balanced growth, environmental care, and social well-being.

Resilience
Resilient design protects Caltrain infrastructure and extends asset lifespan.

Reliability
Reliability is key for customer experience; prioritize ongoing maintenance and asset upkeep.

Connectivity
Caltrain enhances regional connectivity through an integrated transit network.
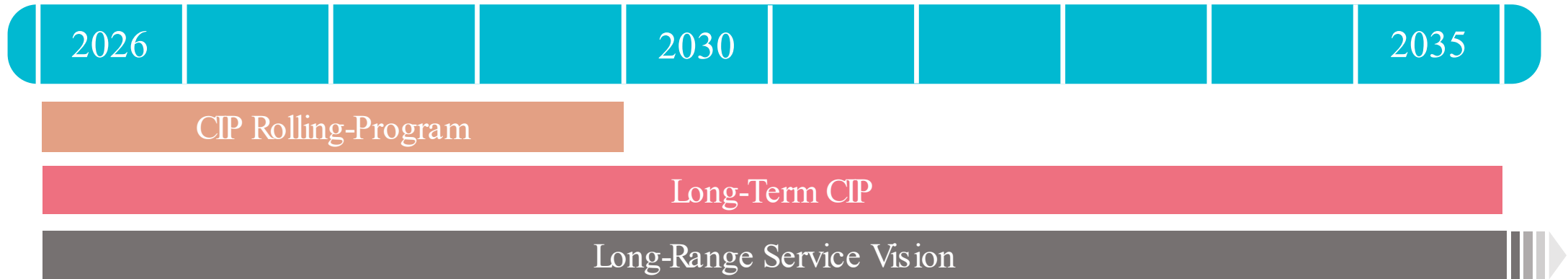
Livability
Caltrain's success measured by ridership and Caltrain's support for community quality of life.

Economic Vitality
Caltrain investments support Plan Bay Area 2050's vision for an affordable, connected, diverse, and vibrant Bay Area.

CIP's Planning Horizon

2026				2030						2035	

CIP Rolling-Program
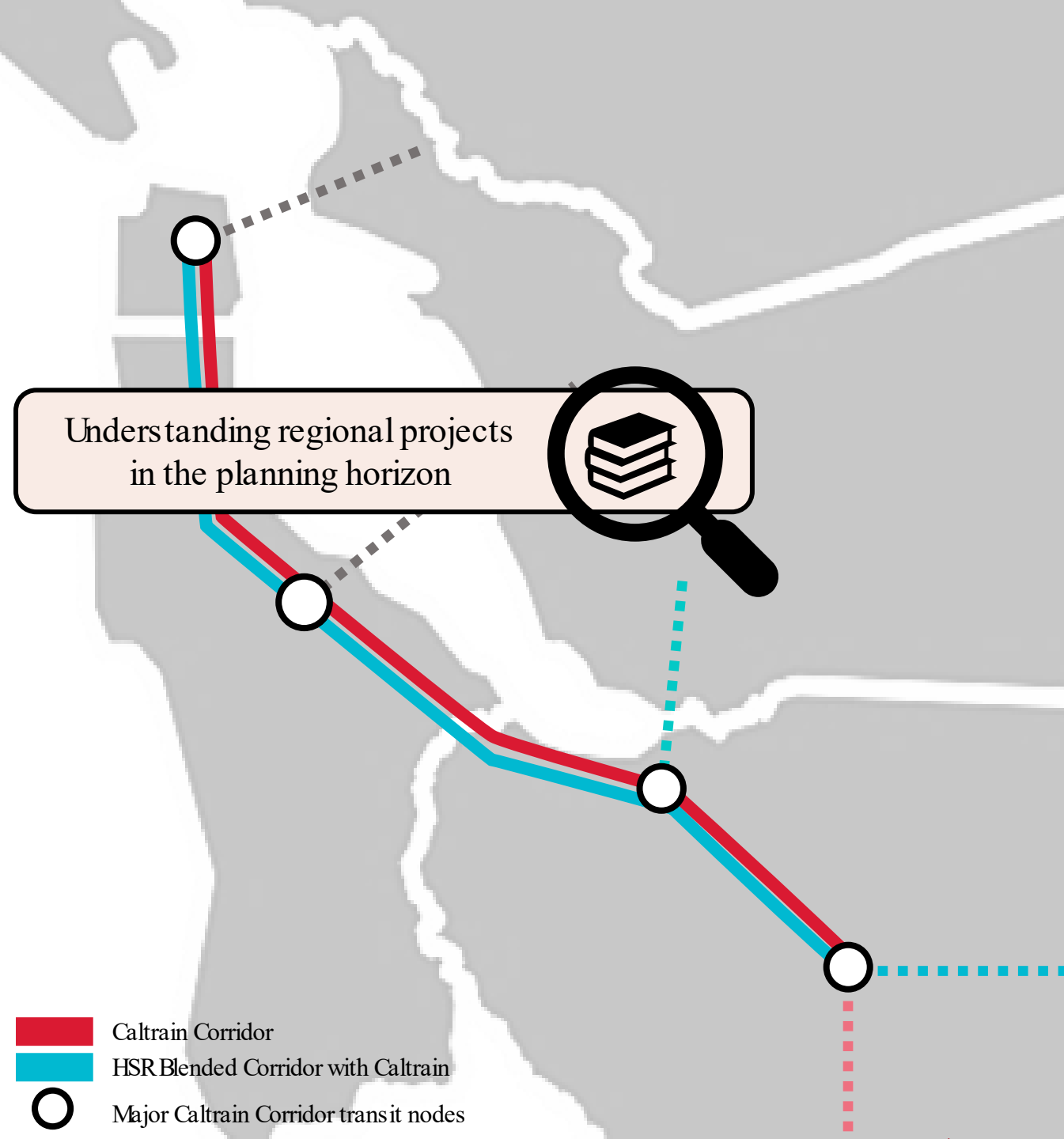
Long-Term CIP

Long-Range Service Vision

* Fiscal Years

- Peer agency CIPs having planning horizons that range from two to twenty years
- Regardless of their span, CIPs share a common purpose:
  They establish an agency's portfolio of key investments along with the resources that will support them

Regional Network

- Understanding which regional projects will be in place by the end of the planning horizon.

- Caltrain does not control most of these regional projects, but they might impact the organization's resources.

Understanding regional projects in the planning horizon

━━━ Caltrain Corridor
━━━ HSR Blended Corridor with Caltrain
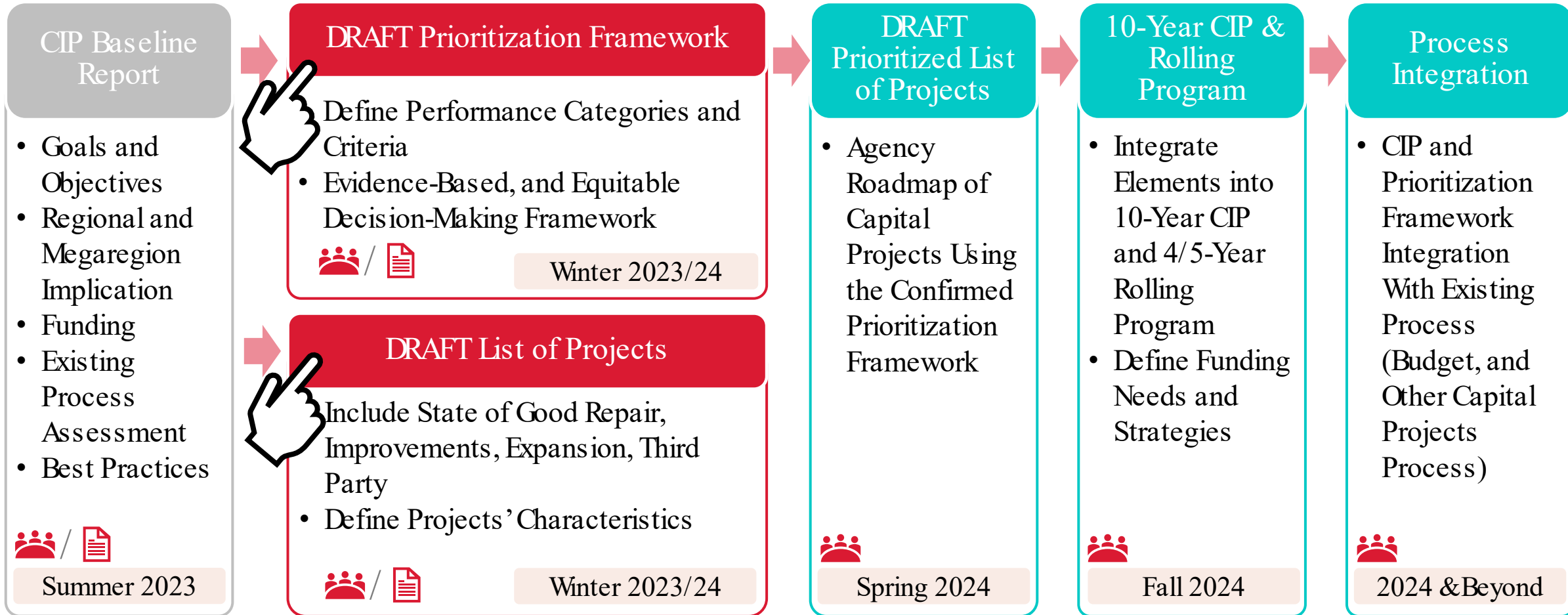○ Major Caltrain Corridor transit nodes

Leveraging the CIP

1. Transitioning the call for projects that starts from scratch to pulling from a list of identified projects and funding needs

2. Having capital program planning and management tools in one easily accessible and centralized platform

3. Anticipating contingency assumptions and needs to improve project cost estimating

Next Steps

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2024 & Beyond

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QUESTIONS & COMMENTS