

Work Plan No. A.14-01 BayPass Pilot – Strategic Planning, Communications and Evaluation

Scope:

Task 0. Contract Management and Administration

Support creation of project work plan and finalize project schedule. Coordinate across consultant partners for contract management, quality control and invoicing support. Provide administrative support as needed.

For evaluation tasks, consultant will conduct project management activities, such as scheduling regular check in calls (biweekly or monthly) with the project team, managing the evaluation project schedule and timeline, and reporting out on upcoming milestones.

Deliverables:

- Final project schedule
- Monthly project invoices and progress report, including specific monthly evaluation progress update reports
- Monthly evaluation team check in meetings

Task 1. Strategic Planning

Support project team with overall strategic planning to ensure work plans and deliverables align across recruitment, outreach and engagement, implementation and evaluation. Hold strategic planning meetings with key members of the project team and consultant team to strategize on aligning work plans and deliverables. Schedule, plan, and facilitate approximately 6 strategic planning meetings. Provide specific strategic planning feedback on topics such as: phase 2 research design (focused on key outcomes and metrics), phase 2 employer surveys, phase 2 recruitment and communications materials and approach, and phase 1 and 2 evaluation reports.

Deliverables: Facilitate six strategic planning meetings, including meeting agenda, materials and summaries

Task 2. Phase 1 Evaluation

Task 2.1 Survey Implementation, Updates and Technical Assistance

Consultant will implement the surveys for all five programs participating in Phase 1. The survey has been designed (as described in the Experimental Design Memo). Consultant will provide technical assistance

as needed to each program site to support the release of the survey. In addition, the Consultant will update the survey as needed for future rounds of administration based on initial results. Examples of tasks may include: supporting the program in uploading the survey into the program's Qualtrics account, participating in testing for the survey before it's released, and troubleshooting any issues with releasing the survey to students.

Deliverable: Release of baseline survey at all five participating programs and up to 4 additional surveys (repeated at 6 month intervals)

Task 2.1.1 Survey Incentives

Consultant will procure survey incentives for Phase 1 participants at a value of up to \$2,500.

Task 2.2. Interim Reporting

Consultant will conduct preliminary evaluation of Phase 1 Results after each survey period (approximately every 6 months).

The first preliminary evaluation will be conducted when the first round of surveys have been completed. Consultant will consider two primary data sources:

- Clipper card travel records (to measure ridership for all individuals in the study, including those who receive the pass, and those who do not)
- Survey data as administered after students and residents receive the BayPass – to gather information on attitudes and perceptions towards the BayPass

The data will allow the consultant to measure ridership trends such as: the geographic location of BART trips; what agency transit systems are used; and the time of day and day of week of when trips are made. The consultant will also assess information on riders' knowledge, attitudes, perceptions, and self-reported use of public transit. A full set of research questions is available in Appendix X.

The Consultant will also work with BART/MTC to establish a set of 1-5 KPIs for the project and will work with the MTC data team to report each 6 months (or after each survey period) reports on these KPIs to track progress. Sample metrics will include: changes in ridership comparing BayPass users and control group, changes in attitudes about BayPass, changes in types of trips taken, etc. The Consultant will produce an Excel summary of KPIs and an accompanying set of PPT slides.

Deliverables: Excel file and accompanying PPT slide decks summarizing 1-5 KPIs of key trends and highlights of preliminary findings after each 6 month interval of data collection

Task 2.3 Draft and Final Evaluation Report (Phase 1)

The consultant will produce a final evaluation report that builds on the preliminary reporting. This final report will be a more detailed assessment of the impacts of the BayPass, including key findings about:

- student transit use, travel behavior, and perceptions and attitudes about the BayPass (as compared to BayPass holders and individuals who were not provided with a BayPass)
- what factors (e.g., demographics, geography) influence people's travel behavior at participating institutions
- More TBD

The Consultant will consider three primary data sources:

- Clipper card travel records (to measure ridership for all individuals in the study, including those who receive the pass, and those who do not)
- Survey data as administered after students and residents receive the BayPass – to gather information on attitudes and perceptions towards the BayPass
- Administrative data provided by institutions

A PPT deck summarizing the results of the final evaluation will also be produced.

Deliverables:

- A draft and final evaluation report for phase 1
- Accompanying PPT slide deck
- All data files from survey results and evaluation methods

Task 2.4. Supplemental Evaluation Activities (Optional)

Supplemental evaluation activities may be needed at each program site to gather additional input beyond the surveys. These activities may include up to 2 focus groups with students at each program site (for a total of up to 10 focus groups). Focus groups will include virtual 1-hour sessions to gather input and feedback from program participants.

Deliverables: Up to 10 in-person one-hour focus groups (two per program location), focus group materials and summary of focus group findings

Task 3. Phase 2 Targeted Employer Recruitment and Engagement Plan

Consultant will lead strategic communications and develop recruitment and outreach materials, especially for Phase 2. Consultant will also develop informational materials for enrolled partners to distribute to employees. Consultant will also support project staff on refining a targeted employer recruitment plan. Sample materials for development may include: marketing and messaging plan, pilot fact sheets, recruitment slide decks, digital materials (website content, e-mails and social media content). Consultant will also produce a limited number of print materials for select partners to distribute to employees (palm cards, door hangers, posters, etc.)

Deliverables:

- Refined employer recruitment and engagement plan
- Phase 2 promotional materials – including: marketing, messaging plan, fact sheets, slide decks and digital materials
- Phase 2 informational materials to distribute to employees or residents (primarily digital, but may include a limited selection of print materials such as palm cards, door hangers, posters, etc. for a selection of employer partners)

Task 4. Phase 2 Evaluation – Research Design and Evaluation Plan

Building on Phase 1 with institutional partners, MTC and BART staff are also developing a second phase of the BayPass pilot in which up to 10 selected employers may pay to purchase an all-agency transit pass, potentially with some subsidy to the employers from MTC. The scope of this phase is under development. The consultant will work with BART and MTC to design a research and evaluation plan for phase 2. The

evaluation that the consultant designs should be able to demonstrate the impact the pass may have on changing behavior, and how the behaviors can be generalized for broader implementation of an all-agency institutional fare product.

Consultant will design research project, including refining research questions to be answered through the findings of the study. Consultant will engage with employers and other stakeholders on research and evaluation plan to tailor experimental design for each institution, ensuring feasibility and effectiveness. Consultant will also liaise with agency staff to ensure that data collected can be used for Title VI analysis.

Deliverables: Draft and final research design and evaluation plan, including draft and final surveys

Task 5 – Phase 2 Evaluation

Task 5.1. Survey Administration and Technical Assistance (Optional)

Consultant will provide technical assistance to up to 10 employers participating in Phase 2. Examples of tasks may include: supporting the program in uploading the survey into the program's Qualtrics account, participating in testing for the survey before it's released, and troubleshooting any issues with releasing the survey to employees.

Deliverables: Up to 3 surveys at each of up to 10 employers

Task 5.1. Survey Incentives

Consultant will procure survey incentives for Phase 2 participants at a value of up to \$2,500.

Task 5.2 Conduct Interim Reporting

Consultant will conduct preliminary evaluation of Phase 2 Results after each survey period (every 6 months). Consultant will consider two primary data sources:

- Clipper card travel records (to measure ridership for all individuals in the study, including those who receive the pass, and those who do not)
- Survey data as administered after employees receive the BayPass – to gather information on attitudes and perceptions towards the BayPass

The data will allow the consultant to measure ridership trends such as: the geographic location of BART trips; what agency transit systems are used; and the time of day and day of week of when trips are made. The consultant will also assess information on riders' knowledge, attitudes, perceptions, and self-reported use of public transit. A full set of research questions is available in Appendix X.

The Consultant will also work with BART/MTC to establish a set of 1-5 KPIs for the project and will work with the MTC data team to report each 6 months (or after each survey period) reports on these KPIs to track progress. Sample metrics will include: changes in ridership comparing BayPass users and control group, changes in attitudes about BayPass, changes in types of trips taken, etc. The Consultant will produce an Excel summary of KPIs and an accompanying set of PPT slides.

Deliverables: Excel file and accompanying PPT slide decks summarizing key trends and highlights of preliminary findings after each 6 month interval of data collection

Task 5.3 Draft and Final Evaluation Report on Phase 2 Results

The consultant will produce a final evaluation report that builds on the interim reporting.

The Consultant will consider three primary data sources:

- Clipper card travel records
- Survey data as administered after employees receive the BayPass – to gather information on attitudes and perceptions towards the BayPass

This final report will be a more detailed assessment of the impacts of Phase 2, including key findings about:

- Employee transit use, travel behavior, and perceptions and attitudes about the BayPass
- what factors (e.g., demographics, geography) influence people’s travel behavior
- how pricing of different products impacts use of the BayPass
- More TBD

A PPT deck summarizing the results of the final evaluation will also be produced.

Deliverables: A draft and final evaluation report for phase 2, and an accompanying PPT slide deck

Task 5.4. Supplemental Evaluation Activities (Optional)

Supplemental evaluation activities may be needed at each program site to gather additional input beyond the surveys. These activities may include up to 1 focus groups of participating employees at each program site (for a total of up to 10 focus groups). Focus groups will include virtual 1-hour sessions to gather input and feedback from program participants. The consultant will also assist the BART/MTC in designing focus groups that examine administrative and logistical challenges relating to the Clipper BayPass (though BART/MTC would take the lead on the design and implementation of these focus groups).

Deliverables: Up to 10 in-person one-hour focus groups (one per program location)

Prime: ARUP N. A.

Subconsultant	Amount	DBE (Y/N)	SBE (Y/N)
The Behavioralist	\$ 206,672	N	N
Civic Edge	\$ 49,885	N	N

Total Work Plan Value: \$ 372,542