



Student Transit Pass Program Development Meeting Agenda

Friday, May 11, 2012, 12 to 2 p.m.

1333 Broadway, Suite 300, Oakland, CA 94612

- 12:00 – 12:10 p.m. **1. Welcome and Introductions**
- 12:10 – 12:15 p.m. **2. Review of Process Timeline** |
[02 Process Timeline.pdf](#) – Page 1
- 12:15 – 12:45 p.m. **3. Recap of Previous Meetings** |
[03 Meeting Minutes 040412.pdf](#) – Page 3
[03A Meeting Minutes 030712.pdf](#) – Page 11
[03B Meeting Minutes 013112.pdf](#) – Page 17
- 12:45 – 1:45 p.m. **4. Review of and Input on the Draft Student Transit Pass Program Scope of Work** |
[04 List of Contacts for Scope of Work Distribution.pdf](#) – Page 23
[04A Comments on Draft ScopeofWork.pdf](#) – Page 27
[04B Comments on Draft ScopeofWork from ACTAC](#) – Presented at meeting
[04C AlamedaCTC Draft Scope of Work.pdf](#) – Page 39
- 1:45 – 2:00 p.m. **5. Wrap Up and Next Steps**

Next Meeting:

Date: Thursday, June 7, 2012

Time: 12 to 2 p.m.

Location: Alameda CTC Offices, 1333 Broadway, Suite 300, Oakland, CA 94612

Staff Liaison:

Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation, (510) 208-7428, tlengyel@alamedactc.org

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Location Information: Alameda CTC is located in Downtown Oakland at the intersection of 14th Street and Broadway. The office is just a few steps away from the City Center/12th Street BART station. Bicycle parking is available inside the building, and in electronic lockers at 14th and Broadway near Frank Ogawa Plaza (requires purchase of key card from bikelink.org). There is garage parking for autos and bicycles in the City Center Garage (enter on 14th Street between Broadway and Clay). Visit the Alameda CTC website for more information on how to get to the Alameda CTC: <http://www.alamedactc.com/directions.html>.

Public Comment: Members of the public may address the committee regarding any item, including an item not on the agenda. All items on the agenda are subject to action and/or change by the committee. The chair may change the order of items.

Accommodations/Accessibility: Meetings are wheelchair accessible. Please do not wear scented products so that individuals with environmental sensitivities may attend. Call (510) 893-3347 (Voice) or (510) 834-6754 (TTD) five days in advance to request a sign-language interpreter.

Student Transit Pass Program Process Timeline

	Meeting Date and Time and Preliminary Schedule	Outcomes
1	Student Transit Pass Program January 31, 2012 12 to 2 p.m.	<ul style="list-style-type: none"> Overview of student transit pass programs and direction from Alameda CTC Board Discussion of program work scope to define: <ul style="list-style-type: none"> Objectives Types of programs Potential partners Evaluation methods Program oversight and review of effectiveness
2	Student Transit Pass Program March 7, 2012 12 to 2 p.m.	<ul style="list-style-type: none"> Review of process timeline Further discussion of program work scope: <ul style="list-style-type: none"> Objectives Types of programs (geographic differences, eligibility, hours of operation, technology, ability to leverage other programs) Potential partners (schools, transit, funding) Evaluation methods (performance measures) Program oversight and review of effectiveness (who will oversee, who will evaluate effectiveness, who will report to the public) Funding partners
3	Student Transit Pass Program April 4, 2012 12 to 2 p.m.	<ul style="list-style-type: none"> Review of and input on the Student Transit Pass Program working draft scope
4	<p>Student Transit Pass Program May 11, 2012 12 to 2 p.m.</p> <p>Alameda County Technical Advisory Committee (ACTAC) May 8, 2012 1:30 to 4 p.m.</p> <p>Steering Committee May 24, 2012 12 to 3 p.m.</p> <p>Alameda CTC Board May 24, 2012 3 to 5 p.m.</p>	<ul style="list-style-type: none"> Review the Student Transit Pass Program draft scope of work ACTAC and the Alameda County Transportation Commission review Draft Scope of Services

	Meeting Date and Time and Preliminary Schedule	Outcomes
5	Student Transit Pass Program June/July 2012	<ul style="list-style-type: none"> • Final approval of Scope of Services by the Commission
6	July/September 2012	<ul style="list-style-type: none"> • Release of Request for Proposals
7	September 2012	<ul style="list-style-type: none"> • Initial Pre-Bid Conference
8	November 2012	<ul style="list-style-type: none"> • Passage of 2012 Alameda County Transportation Expenditure Plan, which will serve as a major funding component for the program • Second pre-bid conference, post-election
9	January 2013	<ul style="list-style-type: none"> • Proposals due to Alameda CTC
10	February 2013	<ul style="list-style-type: none"> • Interviews of top-ranked teams
11	March 2013	<ul style="list-style-type: none"> • Approval of top-ranked team contract initiation



Student Transit Pass Program Development Meeting Minutes

Wednesday, April 4, 2012, 12 p.m., 1333 Broadway, Suite 220, Oakland

On April 4, 2012, the following participants and staff met to discuss the development of a scope of work for a student transit pass program (STPP) for middle-school and high-school students.

Attendees: John Classen, Genesis; Rose DeLeon-Fotte, Youth Uprising; Allysa Evans; Youth Uprising; Unique Holland, Alameda County Office of Education; Kelly Hubbard, Hayward Unified School District; Lindsay Imai, Urban Habitat; Alissa Kronovet, Safe Routes to Schools, Alameda County; Nathan Landau, AC Transit; Lauren Ledbetter, Alta Planning & Design; Kristen Mazur, Metropolitan Transportation Commission (MTC); Jeffery Nazareno, MTC; Lakia Parker, Youth Uprising; Patrisha Piras, Sierra Club; Vie Rodrigues, Youth Uprising; Cyrus Sheik, Livermore Amador Valley Transit; Victoria Wake, AC Transit; Robert Wilkins, Young Men's Christian Association (YMCA)

Alameda CTC Staff/Consultants: Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation; Arun Goel, Safe Routes to Schools Project Manager; Laurel Poeton, Assistant Transportation Planner; Angie Ayers, Public Meeting Coordinator

1. Welcome and Introductions

Tess Lengyel called the meeting to order at 12:10 p.m. The meeting began with introductions.

Tess stated that the purpose of the third group meeting is to develop a scope of work that different applicants could respond to and that will result in testing different models of the STPP for different geographic areas of the county. The genesis of this program is through the work on the Transportation Expenditure Plan (TEP). Alameda CTC staff is working to place the TEP on the ballot on November 6, 2012. If the TEP passes, it will fund \$15 million to develop the initial program for a three-year period, and \$174 million in discretionary funds for successful models that come out of that three-year period.

At the two meetings prior to this, Alameda CTC spent time sharing information on research results from different student transit pass programs and on brainstorming ideas on different aspects of program development

2. Review Process Timeline

Tess Lengyel reviewed the process timeline for development of the scope of services and mentioned a possible schedule change. Due to a conflict with the May 2, 2012

meeting, Tess proposed the next meeting date as Friday, May 11, 2012 from 12 to 2 p.m. By changing the meeting, it will allow Alameda CTC to share the feedback from the Alameda County Technical Advisory Committee (ACTAC).

She explained that the next steps will be to take input from the meeting today and incorporate it in the scope of services, which staff will share broadly with potential partners and the school districts. Staff will then share feedback received from the different groups on the scope of work at the May 11th meeting.

Tess stated that the last Steering Committee is on May 24, 2012, and since the student transit pass program came out of the TEP development, staff wants to give the Steering Committee an opportunity to provide feedback on the draft scope of services. Depending on what happens at the Steering Committee, staff may schedule another meeting with this group in June.

Tess stated the need to finalize a formal request for proposals (RFP) so teams can propose on the program. She informed the group that the program is not necessarily for a consultant team and that different organizations could respond to the RFP. Tess mentioned that it would be ideal to have a team implement the program and provide a method to incorporate the data from the different models in a report that will allow for evaluation, to determine if the models are successful against each other and for optimal implementation. The aim is to finalize and release the RFP in the fall of 2012, and the responses to the RFP will be due post-election. Implementation to test the different models is anticipated for the 2013-2014 school year.

3. Recap of Previous Meetings

Tess Lengyel mentioned that items A-F on the agenda were discussed in the previous meetings and staff incorporated that information into the draft scope of services document.

4. Review of and Input on the Draft Student Transit Pass Program Work Scope

Tess Lengyel reviewed the draft scope of services with the group. Tess mentioned that *Section D: Performance Measures* is not for the project but pertains to a particular contract and how the team performs. Urban Habitat and Genesis submitted a list of recommendations for consideration and discussion during the student transit pass program development. Tess reviewed *Attachment A: Scope of Services* with the group as follows:

Program Objectives: Tess explained why the objectives stated during the previous meetings were revised. She mentioned that we need to ensure that each objective can be evaluated and measured. For example, if an objective stated in the prior meeting was “to increase attendance” it would not be measurable; however, if the objective was

worded as “eliminate barriers to transportation access to schools to enable increased school attendance,” that is measureable.

Questions/feedback from the attendees:

- An objective is needed that will mention the greenhouse gas (GHG) Vehicle Miles Travelled (VMT) reductions. Staff stated that we can add “in the aim to reduce GHG and VMT....”
- Is the Clipper usage measurable for how often an individual uses the bus? The MTC representatives stated that aggregate data is available for the number of people who ride and per usage. Aggregate data is also available for a series of cards within a range of serial numbers.

Transit Operators: Tess stated that even though the ferry services are listed under transit operators, not many students will use the ferry for regular school usage; however, the group did discuss in the previous meetings using the transit pass for after-school and potential weekend activities. This area of the draft scope includes a list of transit operators in Alameda County and the transit services by planning areas.

Committees: Two committees were identified to assist in program oversight and development. The Oversight Committee will help provide direction on the program development and evaluate the program effectiveness. The Technical Advisory Committee will implement the program and include representatives from schools, transit operators, MTC, and other organizations looking to participate in the program. A third committee could be considered comprised of students and parents, or students and teachers, that would help ensure a successful student experience through this program.

Services Requested: Many services are requested; however, a preface is included about all of the services to make it easier for people to respond to the RFP. These items are found under *Item II Scope of Work*. Anyone replying would respond to:

- Define realistic models and identify goals, performance measures, and evaluation tools.
- Look at multiple partners and strategies for low-income communities.
- Describe the program approach and tailor each model to different geographic areas; for implementation, look at how to expand the program in a particular area.
- Consider team composition to show an understanding of how to work with a multi-cultural, multi-income-level, diverse county such as Alameda County, and the team’s approach for the student transit pass development.
- Identify barriers for students, parents, and staff at schools.
- Focus on emission reductions and health issues related to youth transit.
- Understand how technology can play a role in the program; in the meetings we’ve discussed the Clipper card, and this type of program should capture the

existing systems in Alameda County so we are not creating a new system just for this program.

Tess mentioned that the work of the meeting participants is to define the scope of services. Input from the prior meetings is listed under Task 2 – Program Development. The items discussed in previous meetings were:

- Geographic reach
- Eligibility
- Program days and hours of operation
- Technology
- Accessibility
- Cost
- Funding sources

Questions/feedback from the attendees:

- Eligibility: Proximity to school should be removed as a restriction. Even if a student lives a half-mile from school, it can be a struggle for the student to get to school. Staff stated that an analysis must be done to determine if 24/7 services are affordable.
- Accessibility: Consider changing accessibility to access. Consider travel training for all students not just for students using fixed-route services. If this program is expanded to include paratransit services, consider attendants.
- Program Days, Hours of Operation, and Level of Service: Will additional transit service be added? Staff stated that within the initial period, additional services may be unnecessary. In the time period between February and August, discussion can take place with transit operators. The team must also discuss reliability of transit services. Attendees stated that a commitment is needed that transit will be available in the selected areas over the three-year period. As part of the site selection for the initial program, if additional transit is required, this may be a constraint or a funding consideration for the program.
- Funding Sources: It would be helpful to know what types of resources are available, and the RFP does not show this. Staff stated that we are developing this program to be ready when the transportation sales tax measure passes and the initial funding will be from the sales tax measure. Creating a program for all students will require more than one funding source. How will the \$15 million be divided between the planning areas? Staff stated that a recommendation will be provided by the team selected to develop and implement the program; however, there should be a pilot in each area of the county.
- Task 3 - Program Implementation: Attendees stated that we need to keep the program as accessible and simple as possible. Ensure the initial program operates 24/7 and all students are eligible. During implementation of the program, ensure feedback is received from the students, parents, and schools on

the program. Allow for monitoring and evaluation before and after program implementation and assessment.

Is it necessarily best if the development team is the same as the implementation team? Make sure the designers adhere to the specifications. Staff stated that the process is iterative, and the development team will be present during the entire process. The team to work on the program must be multifaceted, and the developers, implementers, and evaluators will work together.

Attendees stated concern that one team would be responsible for development and implementing the program; it's too much work for one team. Suggestions were made to do the following:

- Alameda CTC can find other funding sources, evaluate program effectiveness, and integrate the program with the Safe Routes to Schools program. Staff stated that Alameda CTC is not familiar with school funding; however, Alameda CTC is very knowledgeable about transportation and the eligible funding sources for this type of program. Staff also explained the project and program development and implementation process at the Alameda CTC.
- Task 4 – Communications, Outreach and Agency Coordination Strategy: Attendees stated that a plan is needed for outreach that will include schools (students and administrators), parents, and the community.
- Task 5 – Evaluation and Reporting: Attendees stated that both quantitative and qualitative performance measures are needed.
- Task 6 – Integration of Other Programs: The student transit pass program can be integrated into existing Safe Routes to Schools and travel training programs.

Feedback on performance measures and the Oversight and Technical Advisory Committee:

- The performance measures need to measure impacts on traffic congestion around schools, including congestion reductions and make assumptions on GHG emission reduction.
- Include a matrix for the reliability of the bus service.
- Do we have an assessment on how students get to school now? Do we have an assessment on current conditions, including bus capacity, number of students who take transit or ride in a vehicle? Staff stated that we need a pre-assessment to create a baseline.
- In terms of capacity, is there room to allow additional students on the bus with the student transit pass program? The SR2S representative stated that the program does have a student and parent tally. If the initial school selected is in the SR2S program, a student and parent tally is available. As part of the program development and partnerships, do we consider selecting schools that are already in the SR2S program?

- The recommendations listed in the handout from Urban Habitat and Genesis are included in Attachment A.
- In terms of qualitative performance measures, what is the impact of removing and lifting transportation barriers in terms of attitude about school? How do we feel as a community for supporting and eliminating barriers for young people to improve their well being? The YMCA representative will provide written input.

5. Wrap Up and Next Steps

Staff will incorporate the comments from today's meeting in the scope of services document. The meeting adjourned at 1:55 p.m. The next meeting is scheduled for Friday, May 11, 2012 from 12 to 2 p.m.

RECOMMENDATIONS for ACTC Student Bus Pass Proposal*Submitted by Urban Habitat and Genesis 4.4.12***I. Basic Program Components:**

To ensure equal access, increased transit use and to achieve all the goals laid out in the proposal, all of the testing programs should include the following components.

- All students (Middle and High School) should be eligible (no income testing)
- No time limits should be placed on the passes (year-round, 24/7)
- There should be coordination with the Schools to ensure the pass is used to support attendance and not enable truancy
- There should be an educational component –focused climate change, environmental justice and transit use, including travel training¹
- The testing programs should start with high need areas that have greater proportions of low-income students and transit-riding students (such as East/West Oakland, Emeryville, Hayward or Livermore)

II. Program Structure

Immediately following the three-year testing period, the program should be scaled up to cover all Middle and High School students in the County. The program should continue to be monitored and improved over the life of Measure B (2013-2042).

III. Oversight and Technical Advisory Committees

These will play important roles ensuring accountability to the young people, families and the goals of the program. We believe the Office of Education is the most appropriate program lead.

The Oversight Committee should include the following groups represented and at least one-third of the members should be middle, high school or recently graduated high school youth.² (Every effort should be made to represent the diversity of the county in terms of geography, race, income age and gender on the Committee.)

- Office of Education
- Youth groups - At least 2 (initial groups could include: Youth Uprising and ____)
- Community groups - At least 2 (initial groups could include: Genesis and YMCA)
- Policy groups - At least 2 (initial groups could include: Sierra Club and Urban Habitat)
- ACTC
- School Districts – At least 2 (initial districts could include: _____)

¹ We suggest that youth organizations be involved in developing and conducting these trainings, as these could be quite successful as peer-to-peer trainings.

² We suggest that ACTC consider providing stipends to young people to enable their participation.

- Others

The Technical Committee should include the following groups represented:

- ACTC
- School Districts – At least 2 (initial groups:)
- Bus Operators – AC Transit, Union City and LAVTA/Wheels
- MTC and Clipper Card
- Alameda County Department of Public Health
- Others

IV. Performance Metrics

The Program Metrics should include things directly related to the program impact:

- Student Transit Ridership
- Mode Share (% who use transit vs. drive, walk, bike)
- Drop off/pick up traffic around the target schools
- Impact of program on family budgets
- Impact of program on students' attitudes toward transit and Climate Change
- Impact of program on students' ability to access school, afterschool and other extra-curricular activities

Performance Metrics Should Not Include things that are impacted by many factors outside of the bus pass program, such as:

- Student academic achievement
- Graduation Rates
- Crime Rates

V. Deliverables and Budget

The deliverables for Project Team should be realistic and the program administration should not constitute a higher proportion of the budget than the passes themselves.

- Reducing Deliverables: I recommend shifting Task 2, Identifying other funding sources, and Task 5, Program Evaluation and Task 6, Program Integration to the Oversight and Technical Committees, staffed by ACTC.
- Budget: At least 75% of the funding available should be used to directly fund bus passes to maximize number of students served (with only 8% for administration, 7% for the education program, 5% for program evaluation and 5% for communication/outreach)



Student Transit Pass Program Development Meeting Minutes

Wednesday, March 7, 2012, 12 p.m., 1333 Broadway, Suite 220, Oakland

On March 7, 2012, the following participants and staff met to discuss the development of a scope of work for a student transit pass program for middle-school and high-school students.

Attendees: Mahasin Abdul-Salaam, Genesis; Kathy Brown, Hayward Unified School District (HUSD); Andrea Bustamante, Oakland Unified School District; John Claassen, Genesis; Rose DeLeon-Foote, Youth Uprising; Kelly Hubbard, HUSD; Lindsay Imai, Urban Habitat; Nathan Landau, AC Transit; Mary Lim-Lampe, Genesis; Kristen Mazur, Metropolitan Transportation Commission (MTC); Jeffery Nazareno, MTC; Patrisha Piras, Sierra Club; Vie Rodrigues, Youth Uprising; Amy Shrago, Supervisor Carson's Office; Cyrus Sheik, Livermore Amador Valley Transit Authority (LAVTA); Robert Wilkins, Young Men's Christian Association (YMCA); Julie Yemen, San Francisco Bay Area Rapid Transit (BART)

Alameda CTC Staff/Consultants: Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation; Arun Goel, Safe Routes to School Project Manager; Saravana Suthanthira, Senior Transportation Planner; Angie Ayers, Public Meeting Coordinator

1. Welcome and Introductions

Tess Lengyel called the meeting to order at 12:05 p.m. The meeting began with introductions.

Tess stated that staff has scheduled a series of meetings at Alameda CTC for participants to discuss the development of a student transit pass program. The Alameda County Transportation Expenditure Plan for the new transportation sales tax measure sets aside funding to test different models of student transit pass programs. Alameda CTC is in the process of receiving endorsements from the cities on the Transportation Expenditure Plan, and seven cities have endorsed the plan so far. Alameda CTC is working with all cities, AC Transit, and BART regarding endorsement of the Transportation Expenditure Plan that would serve as the funding source for this program.

The purpose of the meeting is to continue the discussion about the scope of work for the student transit pass program. The aim is to develop a scope of work that identifies the parameters for model student transit pass programs so that a request for proposals can be released so a program can be developed, implemented, evaluated, and a final report can be prepared with recommendations on successful program elements that can be funded and implemented at schools throughout Alameda County.

2. Overview of the Process Timeline

Tess stated that the goal for participants is to develop a scope of work and bring it to the Steering Committee and the Commission for review and potential approval in May 2012. The process timeline in the packet is ambitious; however, the last meeting of the Steering Committee is in May, and the goal is to have members review the document by that time. If voters approve the transportation sales tax measure in November 2012, Alameda CTC could implement the model programs in the 2013-2014 school year. This will allow the Alameda CTC the opportunity to receive the funds in April 2013 and develop and implement model programs.

3. Recap of Previous Meeting

Tess Lengyel stated that the minutes from the last meeting are in the packet, and staff will also document this meeting. She reviewed the program scope discussion documented in the January 31, 2012 minutes. The technology being considered to allow entry on the transit systems is potentially a combination of the Clipper card and the student identification card.

A participant noted that none of Alameda County's small transit operators have Clipper. Another participant stated that for Alameda County transit operators, Clipper has a rollout schedule as follows:

- The LAVTA/WHEELS rollout date is to be determined.
- Union City Transit will roll out its program under AC Transit, and the rollout date is to be determined, as well as if Union City Transit will adopt AC Transit's fare structure.

4. Discussion of Program Scope

Participants discussed the program scope and continued their brainstorming session from the last meeting on objectives, types of programs, eligibility, and hours of operation. Additional discussion will continue at the next meeting on these and other program parameters. The participants brainstormed the information below on the following concepts at the March 7, 2012 meeting:

A. Objectives

- Don't fully require increases in high-school graduation rates as an eligibility requirement. Consider better attendance or better grades.
- Health benefits to students and local communities equal less greenhouse gas emissions and stress from congestion and cleaner transit use.
- Support positive youth development (for example, overall community support for students in Alameda County).
- Gather support from the larger community for student transit.
- Have transit systems that support student access and demand during certain times.

- Prevent a stigma for students with varying incomes who will receive free transit.

B. Types of Programs

➤ Geographic areas

- Will the program pay for transit in areas that do not currently have transit service or use existing services? Tess stated that if the measure passes, the Transportation Expenditure Plan includes \$15 million for the initial three years to test different models. Where will we focus this money? Do we want to test high-density areas at certain schools with a lot of transit access and at the same time test areas that do not have transit access?
- Include paratransit access for students?
- The transit systems must support student access.
- Consider capacity issues for buses during student travel times.
- Perhaps test in mid county transit timeliness issues, especially if it affects attendance rates.
- Offer bus and rail access.
- Ensure the metrics are realistic – High-school graduation rate increases and student achievements may be a challenge to meet.
- Choose dense locations and less-dense locations.
- In Central County (Hayward), consider that:
 - A low number of the population is using transit; many students are in after-school programs, and transit is not available.
 - If afternoon and weekend service was available, it would equate to more students being successful.
- Use a selection process by school, for example, at Castlemont High School in Oakland – If planning for a three-year program, we can leverage the student pass program with the Safe Routes to School (SR2S) program and make sure to develop a model that can be implemented in middle schools then transition to high school so that students will learn early about transit and develop into new transit riders.
- Link middle-school transit service to high-school transit service, starting with a particular middle school.
- Test regular transit use versus dedicated school “trippers”; check the willingness of the parents to receive full buy-in, thereby meeting the program objectives.
- Focus on areas where access to school from an economic perspective is more difficult.
- Start with middle schools that offer trend lines for analysis:
 - Get commitment from transit operators to provide adequate service to support the program.
- Middle schools are different around the county.

- Start in multiple different areas; schools may help do self selection; this also offers testing different demographics and all students in participating schools. Considerations:
 - Need enough examples to get data in different demographic areas.
 - If the program doesn't allow all students in the selected schools, this may create a stigma.

➤ Eligibility

The goal is to provide all students in Alameda County access to the student transit pass; however, the program could start with the areas of greatest need:

- Homeless and drop-out students
- Students in communities of concern

Other ideas include:

- Focus the program (define the program in the areas that have been raised).
- Test different models to test if they create a stigma for students.
- Make the pass available to all students at select schools.
- Give youth centers access to the program.
- Set an age limit (if a student is in a program to receive his or her general educational development (GED), is that student eligible?).
- Provide passes for Alameda County students only (what about students who live in other counties and go to school in Alameda County or live in Alameda County and go to school outside the county?).
- Potentially offer the youth transit pass to after-school students (since it's not mandatory to attend every day in middle schools and high schools).

➤ Technology

- Use the Clipper card technology and place a student photo on the card.
- Use Lifetouch photos with the Clipper card to create a smart card.

➤ Leveraging other programs

- Safe Routes to School (SR2S)
- Provision 1 or Provision 2 Programs – If 80 percent of the children at any given school are enrolled in the free or reduced lunch (FRL) program, the federal government and state will pay schools for meals and other benefits; if the school is coded as provision 1 or 2, the entire school is

considered eligible. This program can determine eligibility criteria if all students are not able to use the student transit pass.

C. Potential Partners

Participants discussed the following partners and their roles:

- Alameda County Office of Education – Educate about using transit to protect the environment, and provide education on the program including transit etiquette (if students are eligible for FRL, the school district will administer this education).
- Alameda CTC – Provide program funding through the transportation sales tax measure
- Cities – Educate students about the program and hold fundraisers.
- MTC – Provide Clipper card technology and potentially provide funding.
- Office of Supervisor Carson – Provide awareness of the program
- Pacific Gas and Electric (PG&E) – Provide education about the program.
- Schools and school districts – Participate in using the program.
- Transit Operators – Provide transit service.
- Youth centers, community centers, YMCA, congregations – Provide education about the program.

D. Evaluation Methods

These were not discussed at the meeting.

E. Program Oversight and Review of Effectiveness

These were not discussed at the meeting.

F. Funding Partners

- Air District (Transportation For Clean Air funding in response to greenhouse gas reduction)
- Climate Initiatives Program
- Federal Transportation Bill and federal education bills/appropriations
- Job Access and Reverse Commute (JARC)
- Kaiser and other health organizations and foundations
- McKinney Vento Act (federal dollars) specifically for homeless students
- MTC Lifeline
- Provision 1 and Provision 2
- Safe Routes to Schools
- Traffic Impact Fees (longer impact)
- Transportation sales tax measure funding (Alameda CTC)
- Other funding (Alameda CTC)

G. How a Program Would Work

- Schools should verify criteria (eligibility, etc.).
 - Clipper – Need to determine the fees associated with loading cards.
- Alameda County Office of Education should administer the program.
- A third party could administer the program.
- AC Transit will work with the schools.
- The information process needs to be clear; the program must address Clipper card issues and define levels of responsibility.

5. Wrap Up and Next Steps

The meeting adjourned at 2 p.m. The next meeting is scheduled for Wednesday, April 4, 2012 from 12 to 2 p.m.



Student Transit Pass Program Development Meeting Minutes

Thursday, January 31, 2012, 12 p.m., 1333 Broadway, Suite 220, Oakland

On January 31, 2012, the following participants and staff met to discuss the development of a scope of work for a student transit pass program for middle school and high school students.

Attendees: John Claassen, Genesis; Stan Dobbs, Hayward Unified School District (HUSD); Jeff Flynn, Livermore Amador Valley Transit Authority (LAVTA); Unique Holland, Alameda County Office of Education; Brett Hondorp, Alta Planning & Design; Kelly Hubbard, HUSD; Lindsay Imai, Urban Habitat; Nathan Landau, Alameda-Contra Costa Transit District (AC Transit); Sue Lee, AC Transit; Billy Martin, HUSD; John Mattos, New Haven Unified School District (NHUSD); Anne Richman, Metropolitan Transportation Commission; Amy Shrago, Supervisor Carson's Office; Blanca Snyder, NHUSD; Tina Spencer, AC Transit

Alameda CTC Staff/Consultants: Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation; Arun Goel, Safe Routes to School Project Manager; Saravana Suthanthira, Senior Transportation Planner; Angie Ayers, Public Meeting Coordinator

1. Welcome and Introductions

Tess Lengyel called the meeting to order at 12:10 p.m. The meeting began with introductions.

2. Purpose of Meeting

Tess Lengyel stated that during the development of the Countywide Transportation Plan (CWTP) and Transportation Expenditure Plan (TEP) both the public and many members of the Community Advisory Committee showed a lot of interest in the development of a student transit pass program. The Alameda CTC Board adopted the TEP on January 26, 2012, which includes \$15 million for to test different models and \$174 million in discretionary funds that can support successful programs.

Alameda CTC is initiating the development of a student transit pass program as directed by the Commission and will develop a scope of work and bring it back for the Commission's consideration. If the transportation sales tax measure on the November 2012 ballot does not pass, the Alameda CTC could move forward to test the program, if it can identify funding and partners. Currently, the Alameda CTC does not have funding for a student transit pass program.

3. Overview of Student Transit Pass Programs and Direction from Alameda CTC Board

Tess gave a presentation on the student transit pass program, which was also given at the September 22, 2011 Steering Committee meeting.

The presentation covered:

- Background and consideration of objectives and purpose for a program in Alameda County
- Background on student pass programs in the county and other regions
- Key issues to consider

The research covered:

- Review of 14 transit agencies from the Bay Area and across the country with youth and/or student fare reductions
- Review of academic research related to student passes, including study of the 2002 AC Transit pilot program
- Review of seven youth pass programs in the nation
- Review of 11 university student pass programs
- Review of the City of Berkeley employee pass program

The presentation and research covered existing conditions, and a review of peer youth programs, university programs, and an Alameda County employer-based program. Tess noted that few areas have free student passes. In the majority of the locations with student passes, students pay a nominal fee and the program supports both bus and rail transit use. New York City has the longest-standing student pass program, and its program eligibility is distance based and hours are only during school days.

4. Discussion of Program Scope

Participants discussed the program scope and brainstormed objectives, types of programs, eligibility and hours of operation. Additional discussion will continue at the next meeting on these and other program parameters. Below summarizes the brainstorming concepts.

A. Objectives

- Increase high-school graduation rates by a certain percentage
- Increase student ridership on transit
- Reduce car congestion around schools
- Reduce the cost of children getting to school by a certain percentage
- Build the “next generation of transit riders”
- Improve safety/access to schools (discussion involved different solutions for different schools; for example, one school may have car congestion; whereas, another school will have a different issue)

- Educational opportunity for students regarding traffic, emissions, and environment
- The program will serve 158,000 students in middle schools and high schools in Alameda County.
- Participants suggested we use the objectives listed in slide four of the presentation:
 - Increase transportation options for travel to school
 - Improve participation in after-school activities
 - Reduce the financial burden on families
 - Improve social equity
 - Improve school attendance
 - Improve academic performance
 - Reduce emissions and traffic congestion
 - Educate students about climate change

B. Types of Programs

➤ Geographic areas

East County –Potentially use the student identification (ID) card as a pass for all students who use WHEELS, similar to how it is done during certain times of the year; to track the usage, the bus driver will count student IDs using a manual counter since WHEELS doesn't have the clipper card technology; BART will not accept the IDs as passes. East County has a method of tracking the information; however it would need to be communicated more clearly to school districts.

- Participants discussed the possibility of a program that supports crossing guards in East County and participants noted that crossing guards may be more appropriate for grades K-5 and not necessarily for a middle and high school program.

South County – Currently, South County does not have a bus program. In this area of the county, middle schools and high schools are near AC Transit bus lines and Union City Transit in Union City.

AC Transit/BART

- Use the Clipper card for AC Transit services in combination with student IDs (if the student IDs are provided to students and have clipper card technology, they will allow entry on transit; however the tracking and administering processes will need to be defined).
- West Contra Costa Transportation Advisory Committee (WCCTAC) has a program that provides a student pass to low-income youth in West Contra Costa County; this program does not use Clipper because it requires a photo ID, and the schools are concerned about privacy.

Staff will contact WCCTAC for information on its student pass program.

- Lifetouch photo, which provides services to most schools for student IDs could potentially print the student IDs on a card Clipper technology. Parents and/or a program administrator could have the ability to activate the card: this method allows every student to have access to transit services.

➤ Times of use

- School year or based on engagement in year-round programs, such as enrichment, music, summer school, etc.
- School day: To/from school, after-school programs, homework assignments, tutoring programs, weekends, etc. (questions regarding morning/evening usage)
- Time restrictions do not make sense if the program is to support the needs of student transportation related to academic needs, which aren't only during school hours
- Time restrictions may be needed for program cost considerations
- Bell time and bus time coordination will be needed
- Focus on schools that may not have good school access to transit; identify how service could potentially be changed to accommodate more schools.

➤ Eligibility

- Currently, an AC Transit youth pass costs \$20 per month for 31 days of unlimited rides.
- Construct a student transit pass program that is free to students using the free and reduced lunch (FRL) program. Meeting participants suggested not combining the FRL program with the student transit pass because a social stigma is attached with any program associated with the FRL program as a qualification. If we use FRL, the program must protect privacy and not have a stigma attached to it.
 - Provision 1 and 2 Programs – If 80 percent of the children at any given school are enrolled in the FRL program, the federal government and state will pay schools for meals and other benefits; if the school is coded as provision 1 or 2, the entire school is considered eligible for FRL (the difference between provisions 1 or 2 is a percentage).
- Potentially construct a program for all students to use:
 - Alameda County has approximately 158,000 students, and it would initially cost about \$16 million to provide all students with a free transit pass and approximately \$8 million to provide service to low-income families.

- A program could be developed that allows all children to receive a student transit pass (which could be the student ID that has Clipper technology), and parents could activate the card for those that can afford it, and a program administrator(s) could activate and pay for the card usage for those who cannot afford it.

The following items will be discussed at the next meeting due to time constraints.

- Technology
- Leveraging with other programs

C. Potential Partners

D. Evaluation Methods

E. Program Oversight and Review of Effectiveness

F. Funding Partners

G. Other Discussion Points

Do we want restrictions on the pass for travel time/day? We must define the program before placing restrictions.

- How do you identify potential new riders? The best approach is to provide a pass for all students or low-income students.
- Some school districts may already provide a level of bus service. If this is the case, will we consider those areas?
- Public expectations must be considered if the transportation sales tax measure passes. How do we manage the expectations if the public considers paying for the service? We may need to consider different models in different areas of the County.
- How do we distribute the passes? Who will administer and keep the privacy? What roll will technology play? We need to integrate a fare structure and integrate it into the student transit pass program.
- Who will receive the pass? Should there be any other considerations for integration of other programs with this one? For example, students graduating from high school are not fully prepared for the workforce and need exposure to different working environments to better prepare them to more easily enter the workforce. Should the program be linked with Alameda County's Safe Routes to Schools Program? Should travel training be integrated into the program?
- What are the performance requirements for students to receive a free transit pass? What are the constraints? Discussion took place on using attendance

as a positive reinforcement to receive the pass. It was noted that homeless youth have the greatest need for the free transit pass and have a higher probability of not meeting certain attendance constraints due to their circumstances. The program should promote school attendance, and achievement; and tracking the information on student use of the program is different than limiting access.

5. Wrap Up and Next Steps

The meeting adjourned at 2:20 p.m. Additional meetings were scheduled at Alameda CTC offices as follows:

- Wednesday, March 7, 2012 from 12 to 2 p.m.
- Wednesday, April 4, 2012 from 12 to 2 p.m.

Student Transit Pass Program Contacts

First Name	Last Name	Affiliation	Email
Alameda CTC Board	22 Members and 20 Alternates	Alameda County Transportation Commission	
Alameda County Technical Advisory Committee	24 Members	Alameda County Transportation Commission	
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Total = 153

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Tess Lengyel

From: Lynn Novak <lnovak@pleasanton.k12.ca.us>
Sent: Monday, April 30, 2012 10:42 AM
To: Tess Lengyel
Subject: Re: Student Transit Pass Program

Hi Tess, I don't have any mark-up the the actual draft scope. I have comments and ideas with regard to things that Pleasanton Unified has done to provide tickets to students. I would be happy to bring my ideas to the May 11th meeting. I look forward to meeting you. Lynn

Lynn Novak
Facilities, Maintenance, Operations
& Transportation Departments
Pleasanton Unified School District
Achievement - Partnerships - Communication
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Tess Lengyel

From: Lindsay Imai <lindsay@urbanhabitat.org>
Sent: Monday, April 30, 2012 5:11 PM
To: Tess Lengyel
Cc: Mary Lim Lampe; Allysa Evans
Subject: Re: Alameda County Transportation Commission Draft Student Transit Pass Program Scope of Work - Request for your Review by April 30, 2012
Attachments: Recommendations for Bus Pass Scope of Services 4.30.12.docx

Dear Tess,

Thank you for this opportunity to give feedback about the proposal. Attached is a detailed alternative proposal for the pass program as well as specific feedback about what Genesis, Urban Habitat and Youth Uprising thinks should be changed within the proposed Scope of Services.

While we have been pleased to participate in the stakeholders process you've facilitated thus far and appreciate how inclusive it has been, we are very concerned that certain aspects of the program are not being defined - like the time frame of the pass and its eligibility - and that there is an over-emphasis on the administrative components of the pass relative to the provision of the passes themselves.

For these reasons, we'd love to meet with you and Art to discuss our proposal and our concerns about the draft Scope of Services in-person. (I know you are working on some dates - so thank you!)

We are committed to the success of this program and to working with you to achieve that.

Best,

Lindsay

On Mon, Apr 16, 2012 at 9:43 PM, Tess Lengyel <tlengyel@alamedactc.org> wrote:

Hello,

The Alameda County Transportation Commission which plans, funds and delivers transportation investments throughout Alameda County has initiated a process to develop a student transit pass program for all middle and high school students. The Alameda CTC is governed by a 22-member body of elected officials representing the County Board of Supervisors, every city in Alameda County, and AC Transit and BART.

The objectives of a Student Transit Pass program are as follows:

- Eliminate barriers to transportation access to schools to enable increased school attendance and youth engagement in school, after school programs, jobs, and other learning opportunities, with the aim to support improved academic performance and graduation rates

- Increase transportation options for transit travel to school with the use of a student transit pass, which may also ease financial burdens on families and reduce greenhouse gas emissions and traffic congestions around schools
- Increase student transit ridership with the aim of educating a new generation of transit riders, including about the relationship between travel choices and their environmental effects
- Expand transit access to all students in middle and high schools
- Leverage other programs to provide benefit to the model programs implemented including, but not limited to the Alameda County Safe Routes to Schools Program and the Alameda County Travel Training program (as modified to suit the needs of students), and workforce development-type programs appropriate for high school students.

You have been identified as a participant in school related transportation activities. This email seeks your review of the attached draft scope of work for the Student Transit Pass Program (STPP).

Alameda CTC staff and representatives from the Alameda County Office of Education, various school districts in Alameda County, and community groups participated in three separate brainstorming sessions to develop this working document. The scope of services will be finalized in the coming months to solicit responses from teams to develop and implement countywide model student transit pass programs.

The purpose of the STPP is to expand students' access to schools via transit by testing different models of student transit programs for middle-school and high-schools students in Alameda County. The program will serve different areas of the County, and students at participating middle schools and high schools will receive transit passes that will provide access to transit services for transport to school and afterschool activities, including jobs during the project period.

The DRAFT Preliminary Schedule Outline is below:

- May 2012: Alameda County Transportation Commission review of Draft Scope of Services, which includes input from schools, transit operators, other interested parties
- June 2012: Final approval of Scope of Services
- July 2012: Release of Request for Proposals
- September 2012: Initial Pre-Bid Conference
- November 2012: Passage of 2012 Alameda County Transportation Expenditure Plan on November ballot, which will serve as a major funding component for the program

- November 2012: Second Pre-Bid Conference, post-election
- January 2012: Proposals Due to Alameda CTC
- February 2012: Interviews of Top-Ranked Teams
- March 2012: Approval of Top-Ranked Team and Contract initiation

The Alameda CTC seeks your input on the draft scope of work, which begins on page 7 of the attached draft Request for Proposals. Please review the attached document and provide input to me, Tess Lengyel, at tlengyel@alamedactc.org by April 30, 2012. If you have questions about this email and/or scope of services, please feel free to contact me at the number below. The Alameda CTC is also seeking input from other interested parties. If there are others not included on this list that you think should provide input, please forward this document to them.

Thank you.

Tess

Tess Lengyel

Deputy Director of Policy, Public Affairs and Legislation

Alameda County Transportation Commission

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Please consider paper waste before printing this email.

Draft Bus Pass Proposal and Recommendations to Alameda CTC's Draft Scope of Services
Submitted by Genesis, Urban Habitat and Youth Uprising
April 30, 2012

What follows is a proposal for how the 3-year Alameda County Student Bus Pass Program should be structured. All three organizations have, for more than a year, participated faithfully in the process to shape the expenditure plan of Measure B3, as well as in the Student Bus Pass stakeholder meetings to develop the Bus Pass Program.

- What are our primary goals?
 - Improve social equity by lowering the financial burden on families and ensure equitable access to educational and economic opportunity
 - Show the commitment of the community to the positive development of youth
 - Address climate change by educating youth about climate change and creating the next generation of transit riders
 - Reinforce that the Eco student bus pass is not just a transportation program, and an environmental program, but also a positive youth development program.
- Who would it serve?
 - All middle and high school students in Alameda County
- When would the pass work?
 - Year round, 24/7 – to ensure access to all enrichment opportunities including summer school, extracurricular activities , part time jobs, etc.
- How would it work?
 - On AC Transit, it would be a Student ID with Clipper Card technology embedded into it. On Union City Transit and LAVTA/WHEELS it would just be the Student ID.
- When would a student lose his/her bus pass privileges?
 - Truant students who are intentionally missing school. The students' schools would be responsible and empowered to take away (and return) the student's ID/Clipper Card while he/she received counseling and intervention to get the youth back on track so he/she can achieve positive outcomes.
- Who would administer it?
 - It would be the Alameda County Office of Education in partnership with ACTC, the transit operators, schools and academics who could lead the evaluation component.
- Who would monitor it?
 - An over-sight committee should also be formed made up of representatives of the above agencies but also youth groups and community organizations, with student representatives.
- Where would it be rolled out ideally?
 - Areas with the highest population density or greatest need, where there is capacity and interest on the part of the school districts to support the program and ideally in geographically diverse locations (eg: one per planning area).
- How would its success be measured?
 - Positive outcomes in youth development
 - Positive impact on family budgets
 - Increase in student transit ridership
 - Increased attendance at after school programs for youth
- What is missing from the ACTC proposal?
 - A cap on Administrative Costs (we propose 7% of the funds)
 - A minimum amount going toward education (we propose 3% of the funds)
 - A minimum amount going toward funding transit passes (we propose at least 90% of the funds should go toward funding transit passes or \$4.5 million per year, which could cover 18,750 students for an entire year on AC Transit at their current monthly pass cost of \$20.00)
 - A breakdown of estimated costs for the program according to ACTC

- A clear understanding of the measurements that will be used to evaluate the success of the program, e.g., positive outcomes in youth development, reduction in truancy, increased graduation rates, more usage of after school programs for youth
- Clarity on who will be accountable to those measurements
- A clear definition on what counts as Administrative Costs
- What should be removed from or reduced within the ACTC proposal?
The deliverables for Project Team should be realistic and the program administration should not be so burdensome as to distract from the goals of the program- to provide free transit passes to youth. We recommend the following changes and deletions from the program to reduce the administrative duties, while maintaining the core program intact.
 - Remove the following deliverables:
 - *Deliverable 1.5 – School-based “Student/Parent/Faculty” committees.*
 - *Deliverable 4.1- The memo about working with ACTC staff, committees and Alameda CTC.*
 - Reduce the following deliverables:
 - *Deliverable 1.3: Instead of monthly status reports, require quarterly reports.*
 - *Deliverable 1.5: Instead of separate meetings with 3+ committees, combine Oversight and Technical Committees (and eliminate the school-site committees) and cut meetings down by half to no more than 18 meetings over 3 years.*
 - Shift responsibility on the following deliverables:
 - *Deliverable 2.4 and Deliverables 5.1-5.2: Program evaluation should be the responsibility of the Oversight and Technical Committees, in partnership with academics and staffed by ACTC – not the responsibility of the Project Team.*
 - *Deliverable 6.1: Shift the requirement to produce 3 drafts of a technical memo on how the pass program could be integrated or coordinated with other student transportation programs to ACTC staff (given their expertise on Safe Routes to Schools and other similar programs).*

These changes will result in the following reduced requirements:

- 18, rather 36 meetings of advisory and oversight committees (prep, staff and summarize)
- 1, rather than 4 technical memos
- No direct responsibility for program evaluation
- No direct responsibility for researching other student transportation programs
- No responsibility for organizing and staffing school-based committees

These changes maintain:

- Direct administration of the program, including an educational component (deliverable 3.1)
- 3 summary memos about program approach and recommendations for program implementation post-3 year testing period (deliverables 2.1-2.3 and 5.3)
- Staffing and supporting the Oversight/Tech committee
- Supporting ACTC staff with presentations to ACTC Board and other key stakeholders as needed

Tess Lengyel

From: Robert Wilkins <rwilkins@ymcaEastBay.org>
Sent: Monday, April 30, 2012 6:01 PM
To: Tess Lengyel
Cc: John Claassen (john.claassen@jlrgear.com); lindsay@urbanhabitat.org
Subject: Student Transit Pass Program
Attachments: Performance and Success Measures ACTC Student Transit Pass Program.docx

Good Afternoon Tess -----

I have been pleased to participate in the ACTC meetings regarding the student transit pass program. I am encouraged by the creative and progressive thought leadership that the Transit Pass program represents. While I am fully aware that the primary purpose of the program and its associated funding is related to transportation, I want to emphasize that the socially responsible, morale and youth development aspects of the project are equally significant and should be more visible in the spirit, letter and leadership of the program. With that in mind I offer the attached brief perspective on performance/success measures for the program. If I can provide any additional information on this viewpoint please feel free to contact me.

Thank you...

Robert A. Wilkins | President & CEO
YMCA of the East Bay
2330 Broadway
Oakland, CA 94612
510-318-7654





**FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY**

Performance and Success Measures for Alameda County Student Transit Pass Program

It has been variously said that the greatness of any society can be measured by how it treats its weakest members, especially its children and youth. Nelson Mandela put it this way, ***“There can be no keener revelation of a society's soul than the way in which it treats its children and youth.”***

Among the multiple benefits and reasons for the Alameda County Student Transit Pass program is its communication of the commitment of the community to the positive development of youth.

Search Institute* has identified a group of building blocks of healthy development—known as **Developmental Assets**—that help young people grow up healthy, caring, and responsible. A number of these assets would be bestowed to thousands of Alameda County youth through the Alameda County Student Transit Pass program. Accordingly they should be included in the evaluation and performance measurements of the Student Transit Pass Program:

- **Community values youth**—Young person perceives that adults in the community value youth.
- **Personal power**—Young person feels he or she has control over “things that happen to me.”
- **Sense of purpose**—Young person reports that “my life has a purpose.”
- **Positive view of personal future**—Young person is optimistic about her or his personal future.
- **Creative activities and youth programs**—Young person spends three or more hours per week in lessons or practice in music, theater, or other arts; sports, clubs, organizations at school and/or in the community, and or one or more hours per week in activities in a religious institution.

These elements can be measured through short surveys administered at the time students enroll in the program and at six-, nine-, or twelve-month intervals.

The YMCA employs the developmental assets approach in all of its youth development, healthy lifestyles, academic enrichment, camping and social responsibility programs.

*For more than 50 years, Search Institute® has been a leader and partner for organizations around the world in discovering what kids need to succeed. Our knowledge and resources help motivate and equip caring adults to create schools, communities, and families where young people thrive.

I REQUIRED SCOPE OF SERVICES, DELIVERABLES and STAFFING

This solicitation is intended to provide the Alameda CTC with a range of services required to provide different models of student transit pass programs in Alameda County. To the highest degree possible, the selected team will coordinate the implementation and evaluation of all programs implemented in Alameda County as described in the Scope of Services attached hereto as **Attachment A** and hereby incorporated herein.

1. Proposal Format and Content

Proposals shall be printed, bound, and be: 1) brief, yet clearly respond to all requests in the Scope of Services and RFP, and 2) not include any irrelevant promotional material. Please submit ten (12) hard copies and one (1) electronic CD copy in pdf format of your RFP.

2. Proposal Content

It is expected that proposals submitted to Alameda CTC will be of professional caliber in content and appearance. All descriptions and information should be clear and concise and provide sufficient information to minimize questions and assumptions. Alameda CTC accepts no financial responsibility for any costs incurred in the preparation of proposals. Upon receipt at the Alameda CTC office, all proposals submitted in response to this RFP will become the property of Alameda CTC.

The following sections of the proposal should not exceed a total of 35 total typewritten pages in length (8-1/2"x11"). The minimum font size shall be 12 points. The cover, cover/transmittal letter, detailed resumes, tabs and appendices (Attachment C – Required Forms) are not counted toward the 35-page limit. Elaborate brochures, unnecessary promotional materials or other presentation material not related to this Scope of Services should not be included. The proposal content and format of the proposal should demonstrate the professionalism, creativity and cost consciousness of the team.

COVER LETTER

Summarize the makeup of the team, key approaches and any other information pertinent to the RFP and:

- Include an original signature of an officer authorized to bind your team contractually;
- State that the proposal is firm for a 90-day period from the proposal submission deadline;
- Provide the name, title, address, e-mail address and telephone number of the individual to whom correspondence and other contacts should be directed during the selection process;

- Provide the name, title, address, e-mail address and telephone number of the individual who will negotiate with Alameda CTC and who can contractually bind the selected team; and
- Detail any proposed co-venture arrangements such as revenue/profit sharing or subcontractor participation.

TITLE PAGE

The title page should indicate the RFP subject, name of the proposer's firm, including sub-consultants, local address, name, e-mail address, telephone number of contact person and the date.

TABLE OF CONTENTS

SECTION A: Response to Scope of Services

- 1. Work Plan** - This section of the proposal shall establish that the proposer understands the project objectives and work requirements and shall describe the proposer's ability to satisfy those objectives and requirements. Succinctly describe the proposed approach for addressing the required work, outlining the activities that would be undertaken in completing the various tasks and specifying who would perform them. Include a timetable for completing all work. The proposer also may suggest technical or procedural innovations that have been used successfully on other projects and which may facilitate the performance of the services and which may not be specifically called out in this RFP. Additional items included that are not specifically requested in the RFP must be described clearly as "additional or optional tasks." Provide a detailed explanation of the approach for completing the work and addressing the tasks identified above.
- 2. Expertise and Approach** - This section should include a description of your team's proposed approach to your assignment at Alameda CTC, reflecting your understanding of Alameda CTC's needs, and detailing the expertise of the team, including all subcontractors, in specific areas of interest to Alameda CTC. Describe how your team's expertise will be practically applied to fulfill the Scope of Services, including how the team will implement the contract, if awarded. This section may include key areas of consideration and the rationale for implementing the contract as proposed. Identify how the team's expertise and approach will add value to Alameda CTC's work. The key approach must include, at minimum, a one page summary detailing the overall comprehensive approach for managing and implementing the full scope of services.
- 3. Management Plan** - The proposal should describe your approach to client communications and coordination. Describe methods of planning, scheduling, delivery of tasks, coordination meeting strategies and how the team will provide updated and accurate information to Alameda CTC for the duration of the contract. Describe how

management of the team members and subconsultants will be handled as well as managing budgetary controls and avoiding exceeding resources allocated for specific tasks.

SECTION B: Proposed Staffing Plan and Availability

Designate the Principal-in-Charge and the Project Manager who will serve as Alameda CTC's key contacts throughout the duration of the contract. The proposal should identify all key team members, describe their specific roles/responsibilities for this contract, and indicate the percentage of the total contract hours that each member will spend on the contract and any other assurances as to their ability to provide the requested services in a responsive and timely manner. For firms/jurisdictions with multiple offices, proposals must clarify which resources are available directly out of the local office. For all key team members, the proposal should include a brief resume describing similar contracts on which they have been involved and their role on that contract, their availability over the duration of this contract, and a description of the benefits the person brings to the team. Full resumes may be included in an appendix. Any substitution of key staff after submittal of the proposal or during the contract will require prior written approval from Alameda CTC.

Describe the qualifications and expertise of your proposed team, including all subcontractors, in providing services for clients comparable to Alameda CTC. Include a brief description of each organization's size as well as the local organizational structure. List principals and partners and specify the location of the office that will serve Alameda CTC's needs. Include a discussion of each team member's capacity and resources. Provide reference contact information. Additionally, this section shall include a listing of any lawsuit or litigation and the result of that action resulting from (a) any services provided by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the consultant or its insurers within the last five years.

SECTION C: Budget

Provide a full description and time breakdown for each task contained in the Scope of Services, detailing your firm's ability to understand and provide services in an effective manner. An estimate of hours by task for all team members should be provided. Total estimated hours should be provided for each task and for each team member.

- A description of billing procedures.
- Proposer shall submit the following:
 - The overall price and budget, showing the level of effort and cost breakdown by tasks identified in the scope.
 - Provide cost breakdown by sub-contractors, if any, and indicate the Local Business Contract Equity goal attainability, based on current certification at time of proposal submission.

The team also may include additional recommended tasks, if desired, which should be clearly identified as optional tasks and should be included as separate line items in the proposed budget.

The top-ranked proposer will be required to participate in negotiations, which may result in revisions to their proposals. The cost and method of compensation will be negotiated with the top-ranked proposer.

SECTION D: Performance Measures

Provide a list of proposed performance measures that could be used during the course of the contract, if selected, to evaluate deliverables and services performed. These performance measures are specific to the proposer's team and its effectiveness in delivering the scope of services. If selected, these will be negotiated with staff during contract negotiations and final performance measures will be incorporated into a Contract.

SECTION E: Appendices

○ Debarment, Suspension, Ineligibility

On all federal aid contracts and all related subcontracts of \$25,000 or more, the team and subconsultants must certify they are in compliance with this provision. This includes subconsultants, material suppliers and vendors.

Each participant in the contract must certify "that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal agency and they have not been convicted or had civil judgment rendered within the past 3 years for certain types of offenses" See Attachment C – Required Forms. A publication titled, "A Listing of Parties Excluded from Federal Procurement and Non-procurement Programs" is available electronically via the internet at <http://epls.arnet.gov>

○ Lobbying Certification

On all federal-aid construction contracts and to all related subcontracts of \$100,000 or more, federal funds may not be used to provide financial gain to a member of congress or a federal agency. Awarding a federal-aid contract to a constituent would be an example of financial gain. This applies to contractors as well as subcontractors. A certification that the contractor has not and will not use federal funds to make any payments for lobbying must be included in the contract proposal (Attachment C – Required Forms).

Payments of nonfederal funds to any lobbyist must be disclosed on Standard Form LLL "Disclosure of Lobbying Activities" (see Exhibit 12-E, Attachment G), and if there are disclosures, included in the contract proposal.

- **Pre/Post Award Audit**

A pre/post-award audit is required for contracts with state or federal-aid highway funds in the contract. The team shall be aware that if a pre-award audit is to be performed, full cooperation with the Caltrans auditors is to be expected. The pre-award audit recommendations from Caltrans shall be incorporated in the contract.

If Caltrans approve post-award audit, the team shall agree to the following contract language below:

CONSULTANT acknowledges that this AGREEMENT and the cost proposal is subject to a post award audit by Caltrans. After Alameda CTC receives any post award audit recommendations from Caltrans, the cost proposal and/or the total compensation figure above shall be adjusted by CMA to conform to the audit recommendations. CONSULTANT acknowledges and agrees that individual cost items identified in the audit report may be incorporated into this AGREEMENT at Caltrans' sole discretion. Refusal by CONSULTANT to incorporate interim audit or post award recommendations will be considered a breach of the AGREEMENT and cause for termination of the AGREEMENT.

After any post award audit recommendations are received, the Cost Proposal shall be adjusted by the Alameda CTC to conform to the audit recommendations.

- **Conflict of Interest**

Provide a list of any potential conflicts of interest in working for Alameda CTC. This section must include, but is not limited to, a list of clients/partners who are cities in Alameda County, Alameda County or transit or transportation agencies operating in Alameda County, and a brief description of work for these clients/partners. Please identify any other clients/partners that would pose a potential conflict of interest as well as a brief description of work you provide to these clients. This list must include all potential conflicts of interest within the year prior to the release date of this RFP as well as current and future commitments to other projects.

- **Assurances and Miscellaneous**

Provide a list of contracts terminated prior to completion (partially or completely) by clients for convenience or default within the past three years. Include contract value, description of work, reason for termination, contract number, name and telephone number of contracting agency.

Provide a list of current and future commitments to other projects in sufficient detail to confirm ability to commit to Alameda CTC needs.

Provide a list of current clients.

I ADDITIONAL INFORMATION

For additional information, the following materials are available:

- 2012 Alameda County Transportation Expenditure Plan
- Alameda County Countywide Transportation Plan
- Student Transit Pass Research Case Studies Summary Memorandum and PowerPoint presentation

WORKING DRAFT

ATTACHMENT A
Scope of Services

WORKING DRAFT

I. Background

Purpose of the Student Transit Pass Program

Due to a decline in funding for student transportation to school, as well as increases in some transit fares costs, the responsibility of transporting students to school has increasingly been placed upon families at a time when financial challenges have risen due to the economic recession. The Alameda County Transportation Commission will create a student transit pass program to support student access to school, school-related activities, and youth transit access to jobs.

The purpose of the Student Transit Pass Program (STPP) is to expand access opportunities to schools on transit by testing different models of student transit pass programs for middle-school and high-schools students in Alameda County that can serve the geographically different areas of the County. Students at participating middle schools and high schools will receive transit passes that will provide access to transit services for transport to school and afterschool activities, including jobs during the project period.

The model programs will be evaluated for effectiveness, and successful models will be implemented throughout the County in middle schools and high schools. The initial student transit pass program will run for three years. Different models will be tested to address the differences in geography, transit service availability, and economic needs in different areas of the County. The aim of the initial model programs is to gather data to determine success factors for implementing a program for all middle and high school students in Alameda County. This program is for Alameda County students who go to schools in Alameda County.

Program Objectives

The objectives of the student transit pass program include the following:

- Eliminate barriers to transportation access to schools to enable increased school attendance and youth engagement in school, after school programs, jobs, and other learning opportunities, with the aim to support improved academic performance and graduation rates
- Increase transportation options for transit travel to school with the use of a student transit pass, which may also ease financial burdens on families and reduce greenhouse gas emissions and traffic congestions around schools
- Increase student transit ridership with the aim of educating a new generation of transit riders, including about the relationship between travel choices and their environmental effects
- Expand transit access to all students in middle and high schools
- Leverage other programs to provide benefit to the model programs implemented including, but not limited to the Alameda County Safe Routes to Schools Program and the Alameda County Travel Training program (as modified to suit the needs of students), and workforce development-type programs appropriate for high school students.

Each objective is expected to be evaluated and measured over the course of the project.

Transit operators

Transit operators in Alameda County that may be involved in the program include:

- Alameda-Contra Costa Transit District (AC Transit)
- San Francisco Bay Area Rapid Transit (BART)
- Livermore Amador Valley Transit Authority (LAVTA and/or WHEELS))
- Union City Transit
- Altamont Commuter Express (as applicable)
- Water Emergency Transit Authority (Alameda County ferries, as applicable)

Alameda County Planning Areas:

- North: Alameda, Albany, Berkeley, Emeryville, Oakland, Piedmont, unincorporated Alameda County
- Central: Hayward, San Leandro, unincorporated Alameda County
- South: Fremont, Newark, Union City
- East: Dublin, Livermore, Pleasanton, unincorporated Alameda County

Transit service by planning areas:

- Central County – AC Transit and BART
- East County – AC Transit, BART, and LAVTA/WHEELS
- South County – AC Transit, Union City Transit, and BART
 - Middle schools and high schools are near AC Transit bus lines and Union City Transit in Union City.
- North County – AC Transit, BART, WETA ferry service
- Unincorporated areas - varies

Committees

Three types of committees will be established to provide input and feedback on the program, including an Oversight Committee, a Technical Advisory Committee and model school site Student/Parent/Faculty Committees.

Oversight Committee

The Oversight Committee will periodically receive updates on the program and evaluate its effectiveness. This committee will evaluate program development, implementation and evaluation results. The committee will receive periodic reports on the program progress and will make recommendations on program effectiveness to the Alameda CTC for consideration.

Members on the oversight committee include the following organizations:

- Alameda County Office of Education
- Alameda County Transportation Commission
- School District Representative from all areas where model programs are implemented
- Student Representatives from the Student/Parent/Faculty Committees where model

programs are implemented

- Community organizations such as the Sierra Club, Genesis, Urban Habitat who participated in the development of the program during development of the Transportation Expenditure Plan

Technical Advisory Committee

The Technical Advisory Committee will be comprised of program implementation partners who will meet on a regular basis to address implementation issues, evaluate effectiveness and provide suggestions for program improvements during the course of the program. Members on the Technical Advisory Committee include the following organizations:

- Alameda County Transportation Commission
- Metropolitan Transportation Commission and Clipper Card staff
- Transit operators participating in the model programs
- School district staff participating in the model programs

Student/Parent/Faculty Committees

These committees will be established at each model school site and will include at minimum four students participating in the transit pass program, faculty members appointed by the school site to participate in the program implementation, and parents as recruited by the schools for participation. This committee will discuss implementation issues and concerns and will provide suggestions and feedback on the following: program monitoring and evaluation methods, outreach and communications, and performance of the program. This committee will serve as the direct feedback link into the program regarding how it is operating at a particular school site. A student from each of the school sites will serve as a liaison to the Oversight Committee.

See Exhibit 1 for preliminary schedule.

Services Requested

The selected team will provide professional and technical services supporting the development and implementation of different models of student transit pass programs in Alameda County. It is the intent of the program that a maximum amount of funds be used to deliver transit passes to students and that the management and evaluation of the program be done as efficiently as possible.

The team will be required to work with the Alameda CTC, the Oversight Committee, the Technical Advisory Committee, the Student/Parent/Faculty Committees, transit operators, schools, youth, parents and other organizations engaged in the development, implementation and evaluation of the STPP. The following services are required under this contract:

- Project Initiation, Management and Coordination
- Program Development
- Program Implementation
- Communications, Outreach and Agency Coordination Strategy

- Evaluation and Reporting
- Integration of other programs such as Alameda County's Safe Routes to Schools Program and Alameda County Travel Training programs, as modified for youth, and workforce development programs appropriate for high school students.

Organizational Chart

The project will be administered by the Alameda CTC. *[Project management and organizational chart to be determined.]*

II. Scope of Work

As a part of the responses to each task below, the team is expected to address the following items for the development and implementation of model STPPs:

1. Define and rationalize realistic models for each area of the county that will address the program objectives and identify goals, proposed performance measures and evaluation tools to evaluate effectiveness.
2. Describe how multiple partners will be engaged in the STPP programs to establish successful programs, including strategies for low-income communities.
3. Describe how the proposed approach will tailor each model STPP program to each unique community and how the program will aim to expand participation at each school site.
4. Describe the team's staff composition and how the proposed approach will identify the needs of and support the multicultural and varied income levels of communities throughout Alameda County.
5. Describe the proposed approach to address barriers to involvement in a STPP program for students, parents and staff at schools.
6. Describe how the proposed approach will address emission reductions as well as public health issues and benefits related to transit use.
7. Describe how technology can play a role in the implementation of the program.

Task 1 – Project Initiation, Management and Coordination

The team will oversee the implementation of the Student Transit Pass Program elements during the course of the project, ensuring that all program elements are implemented effectively.

The work for this task includes managing the program and providing regular progress updates to Alameda CTC and the Oversight, Technical Advisory and Student/Parent/Faculty Committees. As part of this task, the team will meet with Alameda CTC staff to review the purpose of the project, scope of work, project goals and implementation timeline. Alameda CTC staff will provide the team

with all relevant documents. Regular management coordination meetings will be held with Alameda CTC staff during the course of the project. The team will provide minutes outlining action items resulting from the coordination meetings. It is anticipated that these meetings will be monthly, but the number of meetings will be based on need and, therefore, a schedule will be developed during the kick-off meeting. The team will be responsible for developing materials for presenting to the Technical Oversight, and Student/Parent/Faculty Committees, Alameda CTC and other agencies as appropriate to report on the development, implementation and outcomes of the program.

- *Deliverable 1.1: Kick-off meeting notes, with follow-up tasks.*
- *Deliverable 1.2: Refined schedule, task budgets, deliverables, and contract performance measures.*
- *Deliverable 1.3: Monthly progress reports detailing project activities, coordination efforts and goal achievement*
- *Deliverable 1.4: Meetings with Alameda CTC staff, including preparation of agendas and summary notes.*
- *Deliverable 1.5: Meetings with Oversight, Technical Advisory and Student/Parent/Faculty Committees to provide project updates and receive feedback on project deliverables (estimated at 36 meetings over a three year period).*

Task 2 – Program Development

This is a new program for Alameda County. The team will research effective strategies for developing student transit pass programs in each area of Alameda County that will support the program objectives. Based upon an assessment of best practices, as well as research performed based up outreach to schools, students, parents and administrators, transit operators and other appropriate entities, the team will develop recommended model programs, and a proposed project implementation schedule and detailed task budgets.

The team will tailor the program to the unique needs of middle and high school students, with the aim of developing and implementing a program that is easy to administer, is broadly used and does not create any stigma in its use.

The program development must address the following considerations:

Program Parameters

The program parameters include geographic reach, eligibility, program days and hours of operation, technology, accessibility, cost, funding sources, and the ability to leverage other programs and performance measures.

- **Geographic reach:** The program must accommodate geographic differences in Alameda County which include differences in city and county area infrastructure, transit services and transit proximity to schools, and demographics. Models should take into consideration transition of students from middle to high schools, as well as programs that test an entire school, versus only portions of the student body of a school. A model programs must be implemented in all four geographic areas of the County. The program should consider the following areas in development of initial model programs:
 - Areas where access to school from an economic perspective is more difficult

- Schools that may not have good access to transit (the program needs to identify how service could potentially change to accommodate more schools)
 - Capacity issues for buses during high student use times
 - Schools in high-density as well as less-dense areas
 - Linking middle-school transit use to high-school transit use
- **Eligibility:** The program must be developed in such a way to not create a stigma for any child involved.

Eligibility considerations include, but are not limited to:

- Middle and high school students in Alameda County who go to schools in Alameda County
 - Homeless students, drop-out students, and students in communities of concern
 - Students in after-schools programs not on the school premises
 - Family incomes and affordability
 - Proximity to school sites (i.e. New York has a distance based program that supports walking or biking to school for those who live close to their school)
- **Program days, hours of operation and level of service:** The program will provide students with transit access to school, afterschool programs and access to afterschool jobs. The intent of the program is to provide as much flexibility in the use of the transit pass as possible during regular transit operator hours of service. Considerations for cost effectiveness will have to be made for times of the year when a majority of students are not in school. Time of use may become restricted for program cost considerations. Bell-time and bus-time coordination will be necessary.

In addition, transit service capacity during highest student use must be taken into consideration and factored into planning model programs, including potential costs if additional services are needed as a result of demand. Model school sites must be evaluated for current conditions and for potential increases in student transit use.

- **Technology:** The goal is to use the Clipper card technology, or some other easily tracked process, and place a student photo on the student id card. Parents and/or a program administrator could have the ability to activate the card. This method allows every student to have access to transit services. Another consideration is how to use Lifetouch photos with the Clipper card to create a smart card. If the Clipper card technology is used, parents could activate the card for those students that can afford it, and a program administrator(s) could activate and pay for the card usage for those who cannot afford it. Alameda County has approximately 158,000 students, and it would initially cost about \$16 million to provide all students with a free transit pass and approximately \$8 million to provide service to families of concern.
- **Accessibility:** The program must consider transit proximity to school sites, ease of transit pass distribution and tracking, language needs for particular school sites, and travel training for different transit systems. This may include, but is not limited to, travel training information for students using regular fixed-route services, as well as travel training materials

for student who may be transitioning from paratransit services to regular fixed-route services.

- **Cost:** The program must define if there are different costs to students based upon income and how to implement a tiered program that does not create any stigma for any students. The program must also develop the anticipated costs at each model site, including transit pass use and administrative costs at each site. Overall costs for each model program must include administration, transit card distribution and use, pre-, during and post evaluation, costs for travel training materials, distribution and instruction, costs for additional transit services or other applicable elements of a proposed transit pass program, and other costs as applicable.
- **Funding sources:** The transportation sales tax measure will pay for a portion of the program; however, additional funding will likely be required by other sources for long-term program implementation. The team will be required to identify potential funding partners, some of which could include the following:
 - Air District (Transportation For Clean Air funding in response to greenhouse gas reduction)
 - Climate Initiatives Program
 - Federal Transportation Bill and federal education bills/appropriations
 - Job Access and Reverse Commute (JARC)
 - Kaiser and other health organizations and foundations
 - McKinney Vento Act (federal dollars) specifically for homeless students
 - MTC Lifeline
 - Provision 1 and Provision 2
 - Safe Routes to Schools
 - Traffic impact fees

As a part of this task, the team will further develop the program elements and define the work products and performance measures, as well as develop and maintain a detailed overall project schedule, including deliverable due dates. All program evaluation activities will be coordinated, and summary reports will be prepared.

Deliverable 2.1: Summary memo on best approaches for model student transit pass programs for middle and high school students, including rationale for site selection and program design.

Deliverable 2.2: Final recommendation on program approach.

Deliverable 2.3: Develop detailed schedule, budget and draft and final performance measures for each model program.

Deliverable 2.4: Program evaluation approach memo, including how each model program will be evaluated using the final performance measures and how the different model programs will be evaluated against each other and as a whole, survey instruments and summary of current demographics and commute patterns of students at targeted schools.

Task 3 – Program Implementation

This task provides for the implementation of model programs identified in the previous task, including all pre-evaluation and assessment, evaluation during implementation and modifications to the program during implementation based upon feedback from evaluations and the Oversight, Technical Advisory and Student/Parent/Faculty Committees.

Deliverable 3.1: Implementation of up to four model programs in middle and high schools, one in each geographic area of the county.

Task 4 – Communications, Outreach and Agency Coordination Strategy

The team will be responsible for developing a plan for the outreach effort and identify key milestones in the process where outreach and solicitation of input will be required. A preliminary schedule has been developed, as shown in Exhibit 1, and should be taken into consideration in the development of the proposed Outreach Plan. The team will evaluate and recommend an approach for additional outreach efforts aimed at including students, parents, teachers, school counselors and administrators, and other appropriate agencies and organizations to meet the objectives of the program.

Alameda CTC

The team will coordinate Alameda CTC staff in preparing materials and making presentations to the Alameda CTC and other required committees and organizations. Over the 36-month period, it is anticipated that six Commission presentations will be required.

Oversight, Technical Advisory and Student/Parent/Faculty Committees

The team and Alameda CTC staff will run the meetings and facilitate discussion for the Oversight, Technical Advisory and Student/Parent/Faculty Committees. Members of the team are expected to prepare materials, facilitate meetings, document meeting outcomes, and be available as support as directed by Alameda CTC staff during the meetings. These groups will meet at regular intervals for the duration of the program to provide input and comment on the program implementation. It is anticipated that over the 36-month process, an estimated total of 36 meetings will be required (based upon quarterly meetings). These groups will meet separately.

Local Jurisdictions/Organizations

The team will assist Alameda CTC staff with presentations to other local jurisdictions and organizations as necessary.

Deliverable 4.1: Technical Memorandum outlining outreach approach and key milestones, including a detailed discussion of schedule and approach for working with staff, the established committees, Alameda CTC and other outreach efforts (Draft, Final Draft and Final).

Deliverable 4.2: Agendas, materials and summary notes for meetings.

Task 5 – Evaluation and Reporting

The team, working with Alameda CTC staff and the Oversight, Technical Advisory and Student/Parent/Faculty Committees will develop quantitative and qualitative performance measures that reflect the program objectives and goals. These performance measures will be used to evaluate the model programs and to determine methods for modifying the program as necessary over time, as well as to determine what successful elements need to be included in programs that are implemented after the first three-year period. The team will use the final performance measures developed in Task 4 and will demonstrate how they will be used to evaluate effectiveness of the model programs against program objectives and goals. All program evaluation activities will be coordinated, and summary reports will be prepared. The team will give examples of how the performance measures will be applied to the program and to selection of successful elements for future program implementation.

Deliverable 5.1: Technical Memorandum summarizing the effectiveness of the program against the performance measures, evaluation methodology and timelines, results of the program evaluation, and the proposed improvements recommended for implementation of long-term programs (Draft, Final Draft, Final)

Deliverable 5.2: Program evaluation results at the end of years 1 and 2

Deliverable 5.3: Final program evaluation of all three years and recommendations for on-going implementation of successful programs.

Task 6 – Integration of other programs

This task includes identification and development of how a student transit pass program can be integrated with other programs such as Alameda County's Safe Routes to Schools Program and Alameda County Travel Training programs, as modified for youth, and integration of workforce opportunities for high school students.

There are many on-going programs in Alameda County that support healthy access to schools and training on how to use transit. The team will be required to evaluate how model programs can be integrated into and be coordinated with the implementation of existing programs in Alameda County with the aim of providing comprehensive student support programs that leverage funding, education, and resources.

Deliverable 6.1: Technical Memorandum summarizing opportunities for student transit pass program integration and coordination with other student supportive programs (Draft, Final Draft, Final).

Deliverable 6.2: Technical Memorandum summarizing program implementation approach, including funding sources, partners, timelines, resources and deliverables.