

**BART Agreement Number: 6M6136**

**Approval Date: 05/22/24**

**Work Plan No. A.18-01 Sustainability Action Plan 2025**

**Scope:**

**3.1 Task A: Project Management**

- Lead and attend project management meetings every other week with the Sustainability Action Plan Team [up to thirty-six (36) meetings].
  - Develop and send out an agenda prior to each meeting.
  - Record and distribute minutes for each meeting.
  - Develop workplan timeline for all project deliverables (within the first two months of the project).
  - These are assumed to be virtual meetings.
- Form Sustainability Action Plan Stewardship Committee, with BART, made up of at least 5 individuals from different BART departments [up to six (6) meetings].
  - Lead and attend these meetings once each quarter to provide updates about SAP development and solicit guidance.
  - Create and distribute agendas prior to each meeting.
  - Create presentations as needed.

- Record and distribute meeting minutes for each meeting.
- These are assumed to be virtual meetings.

**Key Deliverables:**

- Workplan and timeline for project.
- Meeting agendas (sent prior to meetings), presentations for status updates, meeting minutes (sent out following meetings). These deliverables pertain to meetings with the Sustainability Action Plan Team and Sustainability Action Plan Stewardship Committee.

### **3.2 Task B: Existing Data Review**

With BART’s Sustainability Action Plan Team, confirm categories for the SAP. Categories should encompass the full span of BART’s sustainability initiatives. It is assumed BART’s vision statement is unchanged since the 2017 Sustainability Action Plan and that BART can provide its mission statement if updated. To inform category selection:

- Review existing efforts in the *2017 Sustainability Action Plan*.
- Review report prepared in May 2023 that analyzed BART’s *2017 Sustainability Action Plan* and offered recommendations.
- Make refinements using expertise in strategic planning.
- Project team will evaluate feasibility of aligning BART’s reporting standards with existing frameworks.

Within each of the categories as defined in 3.2.1 to 3.2.7, review BART’s existing data and provide recommendations on the collection process. This data collection will be needed for Task C: Metric Development. If additional categories are defined, an additional service may be requested to collect and review data within that category. If there is a request to align SAP with Global Reporting Initiative or other frameworks that would change the categories structure through Task B through Task E, an additional service may be requested.

BART will be able to respond to requests for information and data within a two-week timeframe.

## **Environmental Performance**

### **3.2.1 Energy and GHG emissions**

- Review BART’s existing process for compiling the energy and GHG inventory, including obtaining existing materials provided by BART.
- Recommend improvements with a particular emphasis on (1) expanding the inventory to track Scope 3 emissions and (2) determining next steps to align with at least one reporting framework.

### **3.2.2 Water**

- Review BART’s existing process for compiling the water inventory, including obtaining existing materials provided by BART.
- Identify potential areas of improvement for collecting and analyzing data.

### **3.2.3 Waste Generation & Diversion**

- Review BART’s existing and planned efforts for tracking waste, including obtaining existing materials provided by BART. (This includes BART’s inventory for waste accounts, audit results for BART headquarters, and other data collected by dumpster sensors.)

- Identify potential areas of improvement for collecting and analyzing data.

## Operations and System Resilience

### 3.2.4 Materials and Construction Operations Optimization

- Review BART's Procurement Policy and strategies.
- Identify opportunities to enhance supply chain sustainability.

### 3.2.5 Extreme Weather Adaptation and Resilience

- Review BART's Local Hazard Mitigation Plan.
- Identify opportunities for further development in resilience services.

## Community Experience

### 3.2.6 Smart Land Use and Livable Neighborhoods

- Review BART's 10-year Transit-Oriented Development Program Work Plan (2020).
- Review Strategic Plans and General Plans for partnering cities.

### 3.2.7 Rider & Employee Experience

- Review BART's Customer Satisfaction Survey results to identify rider concerns. This assumes review of existing content provided by BART in a searchable electronic format (e.g., Excel, Word), not development of a new survey (new surveys are in Task 3).

#### Key Deliverables:

- Existing Data Review Memo *[draft and final]* to highlight recommendations.

## 3.3 Task C: Metric Development

With BART's Sustainability Action Plan Team, confirm goals and metrics for each of the categories in the SAP. To inform goal and metric selection:

- Review existing efforts in the *2017 Sustainability Action Plan*.
- Review report prepared in May 2023 that analyzed BART's *2017 Sustainability Action Plan* and offered recommendations.
- Make refinements using expertise in strategic planning.

### 3.3.1 Stakeholder engagement for goals and metrics

Review goals and metrics developed for each category with up to six (6) groups of stakeholders (i.e. other internal stakeholders, cities, and organizations to be defined by BART) in addition to the Sustainability Action Plan Stewardship Committee defined in Task A. This assumes BART will coordinate and arrange the meetings. The Consultants scope will mirror Task A (i.e. meeting agenda, meeting materials, meeting minutes). Incorporate their input prior to finalization.

- Two of the six meetings will be open to all interested community members (i.e., the other four of six meetings are internal to BART).
  - These are assumed to be virtual meetings.

- These meetings will be held in English.
- The workshops will be recorded and posted on the project website for public viewing.
- The consultant team roles include:
  - **Facilitator:** This person would be responsible for leading the workshop agenda, introducing the project team and the presentation materials, moderating the Q&A and discussion sessions, and summarizing the key takeaways and next steps. These meetings will be held in English.
  - **Zoom manager:** This person would be responsible for setting up and managing the Zoom platform, security, breakout rooms (if needed), polling (if needed), chat, and recording. The Zoom manager would also provide technical assistance and troubleshooting for the participants and the facilitators.
  - **Support:** This person would be responsible for assisting the Zoom manager and the facilitator with tasks and workshop management as needed. The support role may include taking notes, monitoring the chat, helping with breakout room assignments, managing the participant list, sending follow-up emails, and sharing workshop feedback. The support role would also communicate with the project team and the stakeholders to ensure alignment and collaboration.
- In preparation for the two community workshops, the consultant team will conduct four internal meetings with the Sustainability Action Plan Team as part of the biweekly calls to discuss the workshop objectives, format, agenda, materials, and logistics. The internal meetings will also serve as a platform for coordinating the roles and responsibilities of the consultant team and the BART staff in facilitating the workshops. The internal meetings will ensure that the workshops are aligned with the project scope, timeline, and budget, and that they address the expectations and needs of the BART team and the community stakeholders.
  - The consultant team will provide meeting agendas, notes, and action items to the BART team after each meeting. The consultant team will also update the BART team on the progress and status of the workshop planning and preparation.
  - These are assumed to be virtual meetings.

### 3.3.2 Target development

Within each of the categories' goals and metrics, develop targets that are based on Business-As-Usual assessments, using the information collected in Task B, for (1) Committed and (2) Aspirational.

This assumes that existing data are provided in compiled electronic format (e.g., spreadsheets, database, or similar) and that no data entry is needed).

Explore calculating Scope 3 GHG emissions as part of the GHG inventory and address deficiencies that currently prevent submission to reporting frameworks.

#### Key Deliverables:

- Internal stakeholder deliverables for four meetings (meeting agendas, meeting presentations, meeting minutes).
- Community workshop deliverables for two meetings (workshop agenda and invitation, workshop presentation materials, workshop registration and attendance list, workshop feedback and evaluation survey, workshop summary report and recommendations, workshop recording and transcript).
- Metric Development Memo [*draft and final*] including targets for each SAP category and a workplan for how progress will be tracked going forward.

- Assumes BART will consolidate stakeholder review comments between draft and final issue.
- Spreadsheets developed for each target *[draft and final]*.

### 3.4 Task D: Stakeholder Engagement

#### 3.4.1 Internal Stakeholder Engagement

- Conduct an online survey in 2024, for one month, of BART staff to identify past, planned, and potential BART sustainability initiatives within each of the identified categories.
  - Use results from an initial survey conducted in March 2023 to develop the survey questions and scope. Notes and lessons learned from the interviews will be documented.
  - Plan to survey up to 40 BART staff members. BART and the consultant will work jointly to identify the appropriate survey participants.
  - It is assumed BART will manage the survey platform licensing and development. It is assumed BART will do outreach to the survey participants. Consultant is only responsible for drafting the questions included in the survey. The consultant will provide draft and revised survey questions in a Microsoft Word document format. BART will program and field the survey, conduct outreach to support responses, and provide resulting data in Microsoft Excel format (or similar). The survey will primarily contain closed-end questions, rather than open-ended responses that require additional coding and interpretation.
    - It is assumed the survey is only provided in English.
    - Providing incentives (e.g., raffle, gift card) to boost responses is not included in this scope/budget.
- Analyze survey results summarizing the following:
  - Use results of the survey to summarize BART's current sustainability achievements to date within each of the categories.
  - Use results of the survey to inform update to SAP Action Tables.
  - This memo is expected to provide overall summary results, not a comparison of subgroups (crosstabs).

#### Key Deliverables:

- Survey questions *[draft and final]*.
- Memo summarizing survey results *[draft and final]* including current sustainability achievements for each of the SAP categories and input on the action tables per category.

#### 3.4.2 External Stakeholder Engagement

- Conduct an online survey in 2024, for one month, of the public and BART riders to inform actions in the SAP.
  - Additional topics will include: knowledge of BART sustainability facts, knowledge of environmental impacts related to transportation, waste sorting practices, reasons for taking BART, demographic characteristics (race, age, income, education level, city of residence, primary destination).
  - It is assumed BART will manage the survey platform licensing and development. It is assumed BART will do outreach to the survey participants. Consultant is only responsible for drafting the questions included in the survey. The consultant will provide draft and revised survey questions in a Microsoft Word document format. A single survey instrument will cover the public and BART riders. BART will program and field the survey, conduct outreach to support responses, and provide resulting data in



Microsoft Excel format (or similar). The public survey will be brief and simple to complete to support responses; it will not include more than one open-ended response (e.g., "any comments to share?").

- It is assumed the survey is only provided in English.
- Providing incentives (e.g., raffle, gift card) to boost responses is not included in this scope/budget.
- Analyze survey results summarizing the following:
  - Use results of the survey to inform actions in the SAP (such as educating the public on waste sorting protocols). At least one action identified in each of the sustainability categories shall stem from the public outreach efforts.
  - Use results summarize answers to BART's additional topics.
  - Use information from the survey to offer recommendations on how to expand other efforts BART undertakes to collect feedback from riders and employees.
  - This memo is expected to provide overall summary results, not a comparison of subgroups (crosstabs).

**Key Deliverables:**

- Survey questions *[draft and final]*.
- Memo summarizing survey results *[draft and final]* including a table of actions per each category

### **3.5 Task E: Draft and Finalize Plan**

- Write a report that establishes BART's 2025 10-Year SAP. Include a table of actions and sub-actions with assigned responsibility to internal department leads.
- Once completed, BART staff will send a draft of the SAP to stakeholders (e.g., community partners, other transit agencies, survey participants) for feedback. After this period of review, relevant feedback will be incorporated.
- There shall be three drafts of the SAP prior to the final version. This will allow for review from a variety of internal and external stakeholders prior to publication.
- It is assumed the final report is only provided in English.
- The consultant will provide graphical support for the final report as detailed below. BART will be responsible for additional graphics, branding, and/or InDesign work if desired beyond what is detailed in this scope of work.
- Prepare presentation deck to BART Board of Directors. Consultant team will plan to be available for one Board meeting, available to answer any questions. Effort includes up to two rehearsals.

**Graphics Support for Final Report:**

Final deliverable will be an interactive PDF document in the client's branding with customized graphics. The estimate is based on receiving a 100+ page Word document, which we expect could be ~130 pages formatted in InDesign. The deliverable will be provided in English only and does not include accessible document design or remediation.

The template shall be completed and approved by BART during the fourth quarter of 2024. Final content to be received in mid-2025.

- Template
  - Receive Brand specifications from BART's Visual Communications team

- Brand guidelines (logo, colour palette, brand font)
    - Communication with BART's team
    - BART to share relevant stock images/graphics to be included
  - iPDF template creation
    - Construct bespoke template based on BART brand and content requirements
    - Create a sample to present to BART by 4th quarter of 2024
    - Refine template based on feedback
  - Cover design
    - Present 3 options
    - Refine 1 based on feedback
- Format
  - Layout content into template
    - Receive content in Word format
    - Review content quantity and structure
    - Divide content based on space per page in template
    - Pull content into template
    - Identify opportunities for graphics/photos in layout
  - Format unique layouts
    - Dividers, accent pages, active navigation links in page header
  - Graphic elements, callouts, and infographics
    - Receive working files of any graphics in Word report
    - Define a graphic style for tables, charts/graphs, callouts and infographics
    - Apply style to existing graphics
    - Create up to 10 bespoke branded graphics to include in report (e.g. process graphics, technical illustrations, org charts)
  - Asset search
    - Searching for stock photos and graphics not provided by BART
    - Purchase of stock assets not included
- Export
  - Export iPDF
    - Exporting 6 drafts for reviews and feedback
    - Exporting 1 final iPDF for delivery
    - Packaging and uploading all working files to handover to BART

- Meetings and check-ins
  - Meet with Visual Communications rep from BART team to run through branding guidelines and preferences
  - 3x 1-hr meetings to present progress report with BART
- Revisions
  - Revisions 3 rounds of edits from client reviews

**Key Deliverables:**

- Three draft versions of 2025 SAP.
  - BART will consolidate comments per round of review;
  - BART will review drafts within a two-week timeframe;
- Final writeup of 2025 SAP.
- Presentation deck to BART Board of Directors *[draft and final]*

**Prime: ARUP N. A.**

<b>Subconsultant</b>	<b>Amount</b>	<b>DBE (Y/N)</b>	<b>SBE (Y/N)</b>
Winter Consulting Group	\$ 60,002	Y	Y
Cascadia Consulting Group	\$ 144,488	Y	Y

**Total Work Plan Value: \$ 710,343**