



SACOG Board of Directors

April 12, 2012

Connect Card Education/Outreach Contract

Issue: The Connect Card Program Management Committee, representing a Consortium of six transit operators and SACOG, is recommending that a contract for education/outreach be awarded to Jones Worley, Inc.

Recommendation: The Transportation Committee recommends that the Board award the Connect Card education/outreach campaign contract to Jones Worley, Inc., and delegate authority to the Chief Executive Officer to negotiate and execute a final contract in an amount not to exceed \$150,000.

Committee Action/Discussion: At the April Transportation Committee meeting, SACOG staff recommended awarding Jones Worley a contract to direct the necessary education/outreach campaign to convert existing transit riders to the Connect Card, which will set the stage for a larger outreach campaign once the system is in place. While discussing this item, the Transportation Committee raised questions about the selection process and scoring of proposals, about the selection of an out-of-state specialty firm over a local marketing firm, about developing local information and capacity through this contract, and about the structure and content of the Consortium Memorandum of Understanding (MOU), and asked for additional details regarding the selected firm's experience and anticipated work.

As a result of these discussions, the Transportation Committee directed, and staff committed, to take the following steps: provide additional background information on Consortium, its governance and its relationship to SACOG; provide additional information to the Board on the nature of the education/outreach contract under consideration and demonstrating Jones Worley's past experience in achieving behavioral changes in ridership; modify the current contract scope, as necessary, to reflect the intent to make the Connect Card a transformational behavioral change project for transit riders and to ensure that, through this contract, the region captures Jones Worley's expertise in order to grow local education/outreach/marketing capacity; and bring back for future consideration by the Government Relations and Public Affairs Committee a local preference contracting policy. Each of these items is discussed below.

Consortium

The Consortium is comprised of SACOG, Sacramento Regional Transit District, El Dorado Transit, Elk Grove Transit, Folsom Stage Lines, Yolo County Transportation District, and Yuba-Sutter Transit, and is governed by an MOU that defines each party's roles, responsibilities, and procedures. SACOG staff acts as Program Administrator and Project Manager for the Consortium and the Project. The MOU states that certain actions, including approving contractor selections, development of business rules, amending the technical specifications, and modifying the finance plan, require the consent of a majority of the six voting agencies. SACOG is not a voting member, but instead is designated the managing agency for purposes of system implementation, and as such, the Board is given authority to approve new contracts or amendments as recommended by the Consortium. Therefore, contracting decisions in connection with the Connect Card project require mutuality and collaboration between SACOG and the Consortium.

Nature of Education/Outreach Contract and Jones Worley's Qualifications

The public education/outreach campaign is essential to the success of the Connect Card. Habits are hard to change, and this campaign is designed to educate users about how and why to use the new smart card, and to educate and prepare the stakeholders and organizations (employers, schools, colleges, and social service agencies) that subsidize transit usage. Otherwise, transit patrons will continue to pay the old way, or they may stop using transit if it is confusing, and the project might be unsuccessful. The Connect Card has the potential to enhance transit's image in the region—that it is now state-of-the-art, easier to use, more convenient, and more appealing—which will inherently attract new riders; but it is also something that could be damaged if new riders are recruited before the kinks are worked out of the system. Smart card implementations typically have some unforeseen challenges (such as schedule delays, technological bugs, card issues, etc.) in the beginning. Therefore, based on the experiences of other smart card project, staff and the Consortium believe it is prudent to wait until the system is up and running smoothly before embarking on a broad marketing campaign or wider strategy to recruit regular drivers to try transit. If a new user's experience is not seamless and smooth, then that person may never try transit again, and will likely tell others about the negative experience. Conversely, if a new patron tries transit and has a positive experience, the person may become a regular transit rider, and encourage others to try the Connect Card as well.

With this background in mind, staff and the Consortium have proposed a two-phased approach to marketing/outreach/education in order to maximize the transformational objectives of the Connect Card Project. In the first phase, the goal is to educate existing patrons and stakeholders about converting to the smart card, and the effort will include developing educational materials, engaging media throughout the region, and generally setting the stage for a larger campaign to promote transit usage. Although the goal is not to expand ridership in this first phase, we anticipate a natural increase in ridership during this phase, as print, social, and news media across the region run stories about the Connect Card, and stakeholders (schools, employers, etc.) promote the smart card. The second broader marketing and outreach phase will occur once the Connect Card is in use and implementation/technical issues are addressed, and resources permit. In this second phase, staff plans to conduct an extensive effort to market the system to new riders throughout the region. SACOG and the Connect Card Consortium are fully committed to promoting the smart card to new patrons and choice riders as a key transit strategy in fulfilling the goals and objectives of the MTP/SCS. More detail about the smart card conversion campaign is outlined in Appendix F.

The proposed contract here is for the first phase education/outreach effort. The selected vendor will provide high-level advice to staff at all seven Consortium member agencies. The firm will develop a detailed plan and timeline to guide the Consortium staff throughout the process of educating employees, customers, and stakeholders about how and why to use the transit card. The tasks focus on providing local staff with direction on overall approach and schedule, available media tools and stories, how and when to launch roll-out events, and messaging and content for standard manuals, flyers, and other collateral materials. At the same time, as directed by the Transportation Committee, Jones Worley will build capacity and expertise within all seven agencies, as the local staff will be responsible for actually implementing the campaign. The firm will also provide input to the project designers on customer-interface decisions such as hardware and software screenflows. As also directed by the Transportation Committee, the contract scope will provide opportunities for staff and the Consortium to capture Jones Worley's expertise in the conversion of riders for use in the second marketing and outreach phase of the project.

Jones Worley has extensive experience converting existing and new riders to smart card systems. In Atlanta, GA, the new fare collection system increased transit efficiency, attractiveness, and ridership.

Following the conversion of the Breeze card, MARTA experienced a 12 percent overall increase in ridership, and a 22 percent increase among choice riders. Jones Worley also conducted before and after customer satisfaction surveys, with “very satisfied customers”—a five on a scale of one to five—increasing five percent. Although extensive data is rare, Jones Worley reports that one agency has experienced a ten percent increase in ridership, and another reported higher customer satisfaction levels using on-board surveys. Conversely, an agency that has implemented a smart card system without a thorough education campaign is currently experiencing low use and frustrated passengers due to the fact that riders do not know how to use the smart card—they don’t know how to load cards or how to tap. A spokesperson for the agency reported that while they have experienced several technological issues, “most of the problem was that passengers don’t understand how the system works” (Sun Sentinel, 2012). By missing this important step, the agency has reduced public trust and increased expenses. Jones Worley is currently working with this agency to conduct a post-implementation education campaign. Additional information on the selection rationale and on the proposed contractor is contained in Attachments A and B.

Local Preference Contracting Policy

The Transportation Committee also discussed consideration of a local preference contracting policy for future contracts. It was noted that Sacramento Regional Transit District has such a policy and that the City of Sacramento recently adopted a policy. General Counsel noted that local preferences generally are permitted for non-federally funded contracts only. The contract in this case is being funded with federal funds. Based on the Transportation Committee direction, staff will develop a local preference contracting policy for future consideration by the Government Relations and Public Affairs Committee.

Approved by:

Mike McKeever
Chief Executive Officer

MM:RM:gg

Attachments: A – Rationale for Company Selection
B – Company Background
C – Summary of Selection Process
D – Proposed Budget
E – Proposed Project Schedule
F – Scope of Work

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Rationale for Company Selection

Below is a summary of the following:

1. Project need
2. Specific tasks required of the contractor
3. Selection process
4. Description of the firms
5. An examination of the two competing firms' ability to meet these needs, with a focus on (a) related experience, (b) project approach, (c) proposed budget, and (d) implementation.

1. Project Need

The Connect Card Project (Project) and Consortium members need a contractor that can provide high-level advice and direction to educate transit agency staff, stakeholders, and transit customers about why and how to transition to the Connect Card. This is a specialized task requiring unique approaches and tactics, in order for the Connect Card conversion to be a success.

2. Specific contractor tasks required of contract include:

- Develop a detailed plan and timeline to guide the Consortium staff throughout the public education campaign—the contractor will provide high-level and expert advice on schedule and tasks for all aspects of the entire smart card conversion campaign, breaking down by 90-day plans and 30-day responsibility grids.
- Advise Consortium staff on outreach strategies for fare partners—the contractor will provide strategies on tasks such as screenflow design, employee, customer, and stakeholder outreach, and initial card distribution.
- Provide direction to Consortium staff on available media tools and opportunities—the contractor will provide direction on interest/stories and leverage existing Consortium staff relationships with media partners.
- Provide direction to Consortium staff on how and when to launch roll-out events—the contractor will work in consultation with the Consortium to identify appropriate timing and develop ideas and strategy for on-property events, utilizing staff's ability to put on the events.
- Work with Consortium staff to develop messages for print materials—the contractor will provide direction to Consortium staff on content, positioning statements, and messages for standard manuals, flyers, and other collateral materials.

3. Selection Process

SACOG staff worked with the Consortium's "marketing sub-committee," made up of representatives from El Dorado Transit, Regional Transit, Yuba Sutter Transit, and Elk Grove Transit, to develop a Scope of Work (SOW) for the Request for Proposal (RFP). The RFP was released on September 7, 2011, and two qualified proposals were submitted on October 7th. These proposals were reviewed and evaluated by a Proposal Evaluation Committee, made up of El Dorado Transit, Regional Transit, and SACOG staff. Both firms were interviewed on October 25th, and the group formally evaluated both proposals, and unanimously voted in favor of Jones Worley (JW). The selection recommendation was made to the Consortium, made up of members from all six transit operators, and they endorsed the recommendation to select JW on November 1, 2011. SACOG staff worked with the transit operators to develop a SOW, which was approved by the full Consortium on February 14, 2012. The proposed contract would run approximately two years at an estimated value of \$150,000.

4. Description of Firms

Jones Worley

JW is the leading marketing communications firm in the country for smart card conversions, having been involved in the implementation of five uniquely different programs. Based in Atlanta, Georgia, the 23-year-old firm offers all the services of a larger organization, including branding, marketing, public relations, and creative services, but their lower rates, niche expertise, and personal attention reflect the fact they are a small specialty firm. JW has an established practice of utilizing telecommunication technology and strategic visits to manage the project with clients across the country.

Runyon, Saltzman & Einhorn

RS&E is a Sacramento-based, full service, integrated communications firm. The firm focuses on public relations and affairs, advertising, multi-cultural marketing, social marketing and social media. The firm was founded in 1960 and remains one of Sacramento's top marketing firms.

5. (a) Experience

The Consortium members need a contractor that can guide the transit operators, stakeholders, and customers through the complex and difficult task of converting staff, stakeholders, and customers to use the new smart card system. This requires a contractor that understands the many nuances and players within the transit industry; is familiar with the various interested parties that need to be engaged in this process; focuses on existing and future customers; leverages existing resources within transit agencies; and works within the schedule and budget.

Jones Worley (JW)

JW is a specialized firm that works on smart card conversions with transit agencies across the country, with several firms still under contract. This firm is experienced in guiding public agencies through this technical process, guiding customers through this conversion process, and offering all marketing and advertising services, all of which has elevated JW into a leading expert in this field. Below is a table highlighting Jones Worley's relevant experience as described in their proposal.

<i>Project</i>	<i>Client</i>	<i>Summary of Work</i>	<i>Project Fee</i>
Breeze Card	MARTA (Atlanta)	Worked on all facets of complete conversion campaign, including education to employees and employers, and increasing customer and community awareness of the impending transition.	\$1.2 million total budget
EASY Card	SFRTA/Tri-Rail (Miami-Dade)	Guided the Authority through the transition of a new transfer policy, developed strategy and materials for transitioning customers, conducting wayfinding audits and expanding the program.	\$439,000 total budget
Clipper Card	MTA (San Francisco)	Developed recommendations for customer outreach, created messaging and marketing campaigns, including to targeted demographics, overall strategy development and planning.	\$136,000 total budget
ConnectCard	Port Authority (Pittsburgh)	Developed marketing plan, print materials, card distribution plan; will soon begin extensive but targeted customer outreach efforts.	\$1,196,000 total budget
Gateway Card	Metro/St. Louis	Developed targeted conversion campaign of education/outreach for customers, partners, influencers, employees; conducted focus groups; developed communication strategies.	\$250,000 total budget

Runyon, Saltzman & Einhorn

RS&E has a strong record of providing high-quality media campaigns for public and private industries in Sacramento. The firm does not have any transportation, transit, or smart card conversion experience, does not offer best practices or lessons learned, or have experience guiding agencies through a similar or related campaign. Below is a table highlighting RS&E's relevant experience as described in their proposal.

<i>Project</i>	<i>Client</i>	<i>Summary of Work</i>	<i>Project Fee</i>
Refrigerator Recycling	JACO Environmental, Inc.	Develop marketing plans, placing advertisement, developing POS materials, doing social media work	11% media commission; \$7 million annual budget
Childhood Obesity	CDPH Network for a Healthy California	Developed extensive social media campaign, developed advertisement and related strategy and buys.	7.5% media commission; \$12.5 million annual budget
Drive for Blood & Bone Marrow Donations	BloodSource of Sacramento	Provided mass media, news media, community and faith-based outreach.	\$500,000 annual budget
Entertainment Venue	Cal Expo & State Fair	Provided mass media and community outreach.	\$1 million annual budget
Energy Efficiency Campaign	California PUC	Coordinated messages, creative strategies, and tactics, community outreach, and radio and print advertising.	\$2.5 million annual budget

5. (b) Approach

The Consortium staff needs a contractor that can provide a solid, established approach to this specialized process. The tasks focus on offering high-level advice and direction on overall approach, leveraging existing resources, organizing the campaign schedule, and providing all services within the limited budget.

Jones Worley

JW strongly recommends a tailored approach to this difficult task. The firm offers a phased methodology that provides the pertinent information to the right audiences at the right time – and in the right amount. Phases include 1) build awareness to transit agency staff, key stakeholder groups, partners; 2) educate employees, stakeholders, partners about the conversion process; 3) promote the card to existing customers. JW’s approach involves educating current customers on how to use the new system while mitigating any temporary negative impacts on the customer experience. JW provides guidance and strategies for when, how, and why to engage the media, taking advantage of the Consortium staff’s unique strengths, resources, and contacts. The firm does not recommend purchasing advertisement, but instead manages this project effort as an educational campaign with unique needs and approaches. The firm offers high-level advice and guidance for launching roll-out events, again taking advantage of the Consortium’s existing resources. These approaches have proven to be successful at meeting the needs of other, similar Consortium/transit agency staff and smart card projects.

Runyon, Saltzman & Einhorn

RS&E proposes a traditional marketing approach to the project. The proposal focuses on marketing and advertisements, including heavy print, digital and broadcast buys that are outside the proposed budget. The firm is adept at developing marketing plans and advertisements, but that is not the needs of the Project or Consortium. Additionally, the firm proposed managing media relationships, instead of leveraging existing relationships of each transit agency. RS&E also recommended event launches that focus on conducting all the logistics of the events, work that Consortium staff are able to do at little to no cost. The firm suggests reaching out to people where they live, work, play, and worship, as opposed to reaching out to transit riders at transit stations. The firm focuses on methods of training stakeholders (i.e. webinars, manuals, press kits) compared to Jones Worley, which focuses on content for training stakeholders. RS&E also proposes executing social media efforts reflective of a typical campaign, and using RS&E staff to maintain social media profiles, instead of empowering Consortium staff to lead this effort. Overall, RS&E proposes a typical marketing campaign focused on paid advertisements and mass media. This proposal does not meet the needs of the Consortium or the Project.

5. (c) Cost

The project needs a contractor that can complete the campaign within the limited budget of \$150,000. Jones Worley offers the ability to meet the needs of the Consortium staff and Connect Card project for \$149,950. The firm has demonstrated the ability to work within a set budget for a set of services, and deliver on time and in budget. Conversely, while RS&E proposes consultation services for \$150,000, they expressed a strong interest in seeking additional funding

for paid advertisement, and requested the ability to retain media commissions. The firm's experience appears to consist of multi-year projects with much higher budgets.

5. (d) Implementation

JW demonstrates the ability to begin working on this project immediately upon contract finalization. The firm understands the various roles and responsibilities of the agencies and stakeholders involved in smart card conversion programs. JW's experience successfully converting riders to smart card systems around the country provides the firm with the ability to integrate with an aggressive project schedule, and direct and educate Consortium staff.

JW has a strong track record converting both new and existing riders to smart card systems. JW's first smart card project in Atlanta, GA, began as a typical marketing campaign, but the firm quickly realized that traditional marketing didn't work for this type of effort. Using surveys, JW found that only 20 percent of customers had begun using the smart card, while the rest of the customers had smart cards but didn't use them. With this information, JW tailored their marketing efforts towards educational materials that clearly explained to consumers the benefits from switching to the smart card and how to do it. Following the 100 percent conversion to the Breeze Card, the Metropolitan Atlanta Rapid Transit Authority (MARTA) experienced a 12 percent overall increase in ridership, and a 22 percent increase among choice riders. Jones Worley also conducted before and after customer satisfaction surveys, with "very satisfied customers"—a five on a scale of one to five—increasing five percent.

The extensive data gained during the Breeze Card conversion is rare, but JW reports an overall increase in ridership following implementation of other smart card systems. One agency JW worked with has experienced a ten percent increase in ridership within the first year. Another agency reported higher customer satisfaction levels using on-board surveys. The increase in customer usage and satisfaction is particularly notable considering that in the beginning of smart card roll-outs, agencies often experience some unforeseen challenges (e.g. hardware, software, card, or other technological glitches). JW specializes in mitigating any negative impacts on customers if/when issues occur. Additionally, JW reports that following implementation, additional campaigns are regularly needed to tie up loose ends, such as focusing on customers with undesired behaviors. These efforts require experienced direction to Consortium staff; otherwise the unanticipated challenges and behaviors can become the focus of the smart card system, rather than small hiccups in the implementation.

As an example, one agency that has implemented a smart card system without a thorough education campaign is currently experiencing low use and frustrated passengers due to the fact that riders do not know how to use the smart card—they don't know how to load cards or how to tap. A spokesperson for the agency reported that while they have experienced several technological issues, "most of the problem was that passengers don't understand how the system works" (Sun Sentinel, 2012). JW is currently working with this agency to conduct a post-implementation education campaign.

Summary of Connect Transit Card Education/Outreach Selection Process

Overview

The Sacramento Area Council of Governments (SACOG) is in the process of soliciting a vendor to assist SACOG and six transit operators develop a public education and outreach campaign. SACOG released a Request for Qualifications (RFQ) on September 7, 2011 seeking an experienced vendor to provide these professional services. A Proposal Evaluation Committee made up of representatives of El Dorado Transit, Regional Transit, and SACOG staff recommended the selection of Jones Worley to the consortium Program Management Committee made up of members from El Dorado Transit, Elk Grove Transit (e-tran), Folsom Stage Line, Sacramento Regional Transit, Yolobus, and Yuba-Sutter Transit. This Program Management Committee endorsed the recommendation to award to Jones Worley on November 1, 2011, and approved the Scope of Work on February 14, 2012. The proposed contract would run approximately two years at an estimated value of \$150,000.

Process

On behalf of a consortium of six transit agencies, SACOG is seeking a professional services contract with a primary vendor through an RFQ and public agency procurement process. The RFQ design and the conduct of the ongoing selection are guided by SACOG policies. Transparency, consistency, and fairness were the principles that the Evaluation Committee adhered to at all times.

At the submittal deadline, SACOG received two qualified proposals. The bidding firms were:

- Jones Worley Atlanta, Georgia
- Runyon, Saltzman & Einhorn Sacramento, California

Selection

A sub-committee of the Consortium comprised of staff from El Dorado Transit, Regional Transit, and SACOG reviewed and evaluated the submitted proposals. This evaluation panel subjected both proposals to thorough analysis, and determined to interview both firms. The interviews took place on October 24, 2011, and the evaluation panel formally scored the firms as follows:

Firm	Understanding of the Tasks (20 points)	Knowledge of the Team (20 points)	Overall and Technical Approach (20 points)	Experience (20 points)	Cost (20 points)	Total Score (100)
Jones Worley	17.8	19	17.4	19.2	19.2	92.6
RS&E	15.4	14.4	15.6	15.6	18.6	79.6

Jones Worley demonstrated they have the best, most cost-effective strategic approach and the most relevant experience. The firm focuses on direct education to existing riders, making the conversion to a smart card easy and streamlined. This process also allows transit agencies to work out any technical or technological issues before reaching out to a broader audience. Additionally, Jones Worley detailed the unique contributions they can provide to the consortium members, and recommended economic approaches, such as leveraging existing relationships SACOG and transit operators have with media, community-based organizations, and other local contacts.

Jones Worley has been involved in five unique smart card conversions across the country. The firm developed a stream-lined public education and outreach approach through surveys, research, and experience. They understand that educating the public and getting riders to convert to a new system requires an entirely different approach than more typical marketing programs.

Jones Worley's extensive experience is unmatched, and they are highly recommended by regional agencies, transit operators, fare collection agencies, and others in the industry. The firm has demonstrated the capacity to stay within a budget, on schedule, and deliver as promised. Unanimously, the Committee determined that Jones Worley would provide the Connect Card consortium the best overall value.

Proposed Budget

Phase	Task	Est. Cost
1	Planning/Programming	\$9,000
1	Strategy Development	\$13,500
1	Creative Guides	\$12,000
1	Collateral Materials	\$5,250
1	Webpage	\$2,250
1	Media Strategy	\$1,500
1	Event Planning	\$1,500
2	Strategy Development	\$39,000
2	Messaging	\$6,000
2	Collateral Materials	\$15,000
2	Website	\$3,750
2	Media Strategy	\$6,750
2	Event Planning	\$3,750
3	Strategic Consulting/Strategy Dev.	\$20,700
1--3	Travel/Misc. Expenses	\$10,000
\$149,950		

Proposed Project Schedule

<p>Present day-August 2012</p>	<p><i>Phase 1: Awareness – Construction/Installation – Desired behaviors:</i> General awareness and a supportive attitude toward the coming changes. Employees are typically the first to be informed, along with key stakeholder groups, followed by influencers and other partners.</p>
<p>August 2012-June 2013</p>	<p><i>Phase 2: Education – Conversion – Desired behaviors:</i> Transit customers are getting a smart card and using it wherever and whenever possible. Employees, stakeholders and partners are fully engaged. Influencers are aware and supportive.</p>
<p>June 2013-January 2014</p>	<p><i>Phase 3: Promotional – Post-Launch – Desired Behaviors:</i> Transit customers are properly using the Connect Transit Card to pay all their fares (there is a learning curve and behaviors may need to be tweaked), signing up for loss protection and auto-load. Customers of the other five Consortium participants get their cards and begin using them. Employees, stakeholders and partners continue to play a crucial role here. Influencers remain aware and supportive. Issues identified are addressed.</p>

EXHIBIT A

Scope of Work Revised: March 27, 2012

Overview

The Sacramento Area Council of Governments (SACOG) and the Connect Transit Card Consortium are working toward the introduction of a smart card fare collection system that will enable customers to travel throughout six transit systems in the region using just one fare card.

Project Goals

The Contractor will communicate with the Target Audiences, as set forth below, to achieve the following outcomes:

1. **Phase 1: Awareness – Construction/Installation** – *Desired behaviors:* General awareness and a supportive attitude toward the coming changes. Employees are typically the first to be informed, along with key stakeholder groups, followed by influencers and other partners.
2. **Phase 2: Education – Conversion** – *Desired behaviors:* Transit customers are getting a smart card and using it wherever and whenever possible. Employees, stakeholders and partners are fully engaged. Influencers are aware and supportive.
3. **Phase 3: Promotional – Post-Launch** – *Desired Behaviors:* Transit customers are properly using the Connect Transit Card to pay all their fares (there is a learning curve and behaviors may need to be tweaked), signing up for loss protection and auto-load. Customers of the other five Consortium participants get their cards and begin using them. Employees, stakeholders and partners continue to play a crucial role here. Influencers remain aware and supportive. Issues identified are addressed.

Target Audiences

The Consortium's audiences represent a wide range of demographics and the smart card campaign must resonate with all.

- **Current customers** – including regular and occasional riders, cash-payers and monthly pass holders, both lifestyle and life-line
- **Employees** – particularly those on the frontline
- **Partners** – TMAs and other organizations that touch a large number of customers – such as employers, schools/colleges and social service agencies that subsidize transit, and retailers where customers will buy/reload their cards
- **Influencers** (including media) – whose support is crucial in bringing about change
- **General Public/Potential Customers**

The Contractor shall perform the specified tasks under each Phase, as follows:

Phase 1 Methodologies: Awareness – Construction/Installation

During Phase 1, all of the pieces will be put into place in preparation for the conversion/launch in Phase 2 and post-launch activities in Phase 3. The timeline/planning documents and tools will be used in all phases to guide the work effort to ensure activities are completed on time.

- **Task 1: Planning/Programming**

- **Discovery Session** – The Contractor shall conduct a day-long strategy and immersion session with the Consortium.

As part of these activities, the Contractor will conduct a Discovery Session to capture the vision for the new Connect Transit Card system, as well as identify business goals, and challenges and opportunities presented by the conversion, as well as those presented by each transit system.

The Contractor will also discuss with Consortium members where the internal strengths are, and where the most assistance is needed from the firm, and how projects should be prioritized. This collaborative approach will take advantage of each party's unique strengths to generate the most successful outcome.

During these initial steps, the Contractor will also share key lessons learned.

Finally, the Contractor will take a rail and bus tour of Sacramento riding on RT and some of the other systems to get a feel for the challenges and opportunities the smart card conversion will present.

- **Research/Best Practices** – The Contractor shall review and evaluate the findings gathered from previous customer surveys and focus groups on both the smart card in specific and the respective transit agencies in general. The purpose is to become as knowledgeable as possible about the Connect Transit Card's customer base and target audiences, and to identify possible challenges and opportunities that may be faced during the rollout.

In addition, at various stages of the implementation, the Contractor shall obtain information from 3 to 5 peers regarding lessons learned to help the project team and allow for informed decision-making. Some of the Authorities Contractor will reach include MARTA/Atlanta, Muni/San Francisco, SANDAG/San Diego, Sound Transit/Seattle, Metro Transit/Minneapolis/St. Paul, Port Authority/Pittsburgh, Metro/St. Louis.

Hours: 60

Cost: \$9,000

- **Task 2: Strategy Development**

As a result of the volatility of smart card implementation timelines, the Contractor will utilize the following strategic process:

- **Topline Plan** – The Contractor will develop a topline plan, based on the feedback and insight we get during the discovery sessions. This guiding document will set forth the approach for the rollout, including an overview of the strategy, goals and target audiences divided into phases, and identify anticipated challenges and solutions, as well as desired thoughts/behaviors. It will not include specific tactics or timing that needs to be updated.
- **Timeline Grid** – A companion piece to the topline plan, the Contractor will develop a document to break the project down into 90-day segments, setting forth the area of focus for each time period. It lists the rollout status and concurrent agency milestones, and includes a topline overview of strategy and tactics divided by target audience. This document will be adjusted as needed as the timing of the Connect Transit Card rollout changes.
- **90-Day Plans** – As Phase 2 approaches and the need for communications becomes more frequent, the Contractor shall extrapolate 90-day plans from each quarterly section in the timeline grid and develop a detailed plan of the work that will be accomplished during that timeframe, including more specific goals, strategies, target audiences and desired thoughts/behaviors for the quarter, along with details on the methodologies that will be implemented.
- **30-Day Responsibility Grids** – Based on the 90-day plans, the Contractor shall develop more specific responsibility grids, at the beginning of each month, to identify the individuals responsible for completing each task – including Consortium member staff – and the deadlines to ensure the project stays on track.
- **Strategic Consulting/Strategy Development** – The Contractor will provide direction to SACOG and Consortium members on the below tasks, including developing messages, timelines, and strategy for key milestone activities, such as:
 - *Screenflow Design* – Providing suggestions on how SACOG can tweak its screenflows to make them easier for customers to understand.
 - *Employee Outreach* – **Making** recommendations on what is important for employees to know based on the timeline – and for keeping them engaged.
 - *Initial Card Distribution* – **Developing** recommendations for getting cards in customers' hands.

- *Customer Outreach* – Making suggestions on what information to relay to customers and when throughout the implementation process.
- *Community/Partner/Stakeholders Outreach* – **Providing** suggestions on how to involve these audiences and when.

These activities will be incorporated into the timeline grid, 90-day plan and responsibility grid.

Hours: 90

Cost: \$13,500

- **Task 3: Creative Guides** will be developed by the Contractor with input from Consortium members. including:
 - **Positioning Statement** – The Contractor will develop a positioning statement for internal use to help ensure that everyone is communicating with one voice about the new Connect Transit card – whether it is to customers, employees, influencers, the media, regional partners or the general public. The positioning statement represents how-the Consortium wishes the smart card system to be perceived. All messages that are developed for the smart card conversion should flow from the positioning statement. A strong smart card brand will be built by consistently using messages that are centered around and support the positioning statement. The Contractor may also create a tagline, if desired.
 - **Messages/Talking Points** – To quickly explain the new smart card system and summarize the benefits for customers, the Contractor shall develop topline messages. These messages will use consumer language and avoid jargon (such as AFCS and TVM), and be distributed to staff prior to being introduced to the public, so that employees are knowledgeable.
 - **Creative Brief** – The Contractor will prepare a creative brief that incorporates the findings from the research, along with feedback from the discovery session into a short document that serves as a guide and an evaluation tool for all future communications and creative efforts. The purpose of the document is to ensure that visual and verbal communications are in line with the Consortium’s business goals.
 - **Standards Manual** – To guard the new smart card’s brand consistency, the Contractor will create a style guide to document the tone and visual presentation of its brand attributes. The initial draft of the document will include common sections such as the logo, color palette and fonts.

Hours: 80

Cost: \$12,000

- **Task 4: Collateral Materials.** SACOG will develop and produce collateral materials with input and direction from the Contractor. Final design must be approved by Consortium.

Long-term, all of the Consortium’s current communications tools – as well as some new ones – will be employed in this rollout campaign in order to achieve the amount of repetition required to elicit behavioral change. Short-term, Phase 1 will incorporate a few of these tools to begin building awareness about the Connect Transit Card. The Contractor suggests the following tools for Phase I, with more being added toward the end of this phase and as customers start using their cards in Phase 2.

The Contractor will work with the project team to develop content and messaging, and SACOG will design and produce these materials. Final design must be approved by Consortium

- Introductory flyer or brochure (distributed by hand and in racks)
- “Coming Soon” banners and/or car/bus cards
- Introductory employee pocket guide

Hours: 35

Cost: \$5,250

- **Task 5: Webpage.** The Contractor will advise on content needs, and SACOG will develop and maintain the site. Final design must be approved by Consortium. To help ensure consistency in information, a single website should be developed for target audiences to get information on the Connect Transit Card. During Phase 1, a button should be created to put on-Consortium member home pages to link to one common website. The initial site will be very small – perhaps 2-3 pages, with information on what’s happening right now in the system’s development, an overview of the vision for the Connect Transit Card and its benefits, and some FAQs on the new system. This site will be expanded as the amount of information grows.

Hours: 15

Cost: \$2,250

- **Task 6: Media Strategy.** Consortium staff will use the project schedule, messages, and material to work with local media.
 - **Traditional Media** – The introduction of the Connect Transit Card is an exciting development for the greater Sacramento area and will likely generate a lot of interest and curiosity from the general public, particularly those who may be familiar with the Clipper card that has been rolled out in nearby San Francisco and the greater Bay area. Keeping media in the loop even in the early stages is key to generating maximum benefit and, long-term, attracting new riders.

The Contractor will work with SACOG and the Consortium's media relations staff to provide counsel as needed, such as providing story ideas for generating positive media coverage.

- **Social Media** the Consortium may develop a Facebook page to start building awareness about the Connect Transit Card among target audiences, especially younger riders and potential riders, as there is more news to report in the middle and latter stages of Phase 1, when there is something happening to report on every few days. Someone from within the Consortium should be responsible for updating the page and adding new information and details. Interns can be great at this, but must fall under the guidance of someone in marketing or public relations. The initial page could be set up to allow outgoing posts only, if desired. The Contractor will suggest topics and ideas of content to post. Additional social media tools may be added in the future based on the Consortium's ability to maintain the networks and keep information updated.

Hours: 10

Cost: \$1,500

- **Task 7: Event Planning:** The logistics for these events will be coordinated by Consortium staff.

Celebrating milestones is important for creating initial awareness and generating excitement toward the Connect Transit Card.

The Contractor will work in consultation with-the Consortium to identify appropriate timing and develop ideas and strategy for one on-property event to celebrate an early milestone. The event may celebrate the start of construction, arrival of the first equipment/test equipment, install of the first equipment, etc., and should involve all members of the Consortium, as well as customers, employees and partners.

Hours: 10

Cost: \$1,500

Total Phase 1 budget:

Hours: 300

Cost: \$45,000

Phase 2 Methodologies: Education – Conversion

During Phase 2, the tools developed in Phase 1 will be used to educate customers about the need to get a smart card and how to use the new system.

- **Task 1: Strategy Development**

- **Timeline Grid** – The Contractor will update this document as timing for the implementation shifts. It will guide the activities described in the 90-Day Plans in this phase.
- **90-Day Plans** – The Contractor will continue developing 90-Day Plans to guide quarterly activities throughout Phase 2.
- **30-Day Responsibility Grids** – The Contractor will create Responsibility Grids to drive the day-to-day activities in Phase 2, delineating responsibilities and deadlines for each month’s planned activities.
- **Strategic Consulting/Strategy Development** – As the rollout begins, the Contractor will continue to provide insight and expertise learned from other implementations and peer best practices on things such as:
 - *Updated Card Distribution* – As the conversion progresses, the Contractor will make any necessary changes to the initial plan, based on key decisions being made.
 - *Employee Outreach* – The Contractor will continue making recommendations on what is important for employees to know, based on the timeline – and for keeping them engaged.
 - *Customer Outreach* – The Contractor will continue making suggestions on what information to relay to customers and when throughout the implementation process.
 - *Community/Partner/Stakeholders Outreach* – The Contractor will continue providing suggestions on how to involve these audiences and when.

Hours: 260

Cost: \$39,000

- **Task 2: Messaging** The Contractor will develop content, schedule, and messages that Consortium members will use to design, develop, and distribute materials.
 - **Messaging** – As the Connect Transit Card continues its rollout, additional messages will be created to inform customers, employees and other target audiences and generate the desired behaviors at each milestone.
 - **Messaging Schedule** – With information being disseminated so rapidly and frequently in Phase 2, the Contractor will develop a grid indicating what messages are being communicated when, how and to whom.

Hours: 40
Cost: \$6,000

- **Task 3: Collateral Materials** SACOG will develop and produce materials with input and direction from the Contractor.
Following the awareness buildup in Phase 1, a complete educational campaign is necessary for the card distribution and customer rollout in Phase 2. Taking extra care to schedule timing and setting up an efficient distribution and installation system are critical to the success of this effort. Items such as car and bus cards, banners and posters can have a long distribution time, so careful consideration will be given during the planning process. Tools in Phase 2 may include:
 - Construction barriers or signage/A-frames
 - Coming Soon! customer flyer or rack brochure with details on the system
 - Follow up flyers/rack brochures with details on how to get a card/when and to use the new system (distributed by hand and in racks)
 - Educational banners and/or car/bus cards telling customers how to get a card and/or how to use
 - Card wraps (for use with regular pass customers like monthlies)
 - Updated employee pocket guide
 - FAQs
 - Tabletop displays and promotional items (for community outreach)
 - **Guerilla Tactics** – Inexpensive ways to grab attention and get traction during the final transition stages includes non-traditional methods to reach audiences in places they don't expect – like flyers taped to vending machines, seat drops and hang tags.
 - **Advertising** – During the crucial final stages of the implementation, selected advertising may be needed to give the campaign the final push it needs, particularly radio and print ads in ethnic and community publications.

Hours: 100
Cost: \$15,000

- **Task 4: Website** The Contractor will advise on content needs, and Consortium staff working at the direction of the consortium members, will develop and maintain the site.

The webpage developed in Phase 1 will be updated with current information and expanded to include additional details on how and when to get a card, how to use the card, requirements for different customer groups, etc. The manufacturer should

develop a back-end transaction processing segment for the website as well to enable online ordering and sign-up for autoloading.

Hours: 25

Cost: \$3,750

- **Task 5: Media Strategy** The Contractor will advise on strategy, schedule, and messaging; Consortium members will work with local media partners.
 - **Traditional Media** – The contractor will continue to offer suggestions on topics for generating ongoing news coverage and develop a calendar for a steady stream of ongoing, positive news on the Connect Transit Card. The media materials created in Phase 1 should be updated as well.
 - **Media Tour/Demo** – The Contractor will develop recommendations for a “behind the scenes” media tour for select TV and print reporters. Similar events should be planned for employees and stakeholders.
 - **Social Media** – The Facebook page should be updated at least three times a week at this juncture (by Consortium staff). Ideally, the page will now allow followers to post comments and questions. If there is sufficient staffing available, other outlets can be added, such as Twitter – to reach customers – particularly young audiences. The contractor will continue to offer suggested topics and content to post.

Hours: 45

Cost: \$6,750

- **Task 6: Event Planning** The Contractor will advise on strategy, schedule, and messaging, and Consortium members will coordinate and implement the event. The Contractor will work with RT Marketing staff to develop recommendations for an RT kick-off event to build excitement around Connect Transit Card. This event will be implemented by RT and designed so that other transit partners can produce similar events for their milestones.

Hours: 25

Cost: \$3,750

Total Phase 2 budget:

Hours: 495

Cost: \$74,250

Phase 3 Methodologies: Promotional – Post-launch

- **Task 1: Strategic Consulting/Strategy Development**

During Phase 3, the Contractor will take on more of an advisory role. The transition is complete for most RT customers and they are getting the hang of using the new system, along with employees and partner agencies. However, there are usually some loose ends to tie up – customers not having all the desired behaviors, unanticipated undesired behaviors that need correcting, and a push to get customers to sign up for some of the Connect Transit Card's most beneficial features – loss protection and autoload. Other developments may include initiating pay per boarding and charging fees for the Connect Transit Card. Rollout to the remaining partner agencies will continue in this phase as well. Includes development of broad marketing strategies for follow-up campaign.

Hours: 138

Cost: \$20,700

Travel/Expenses Budget

Contractor expects to make 4-6 trips to Sacramento during this contract period, with an estimated cost of \$1,500/trip/person (for a 3-4-night trip – including airfare, lodging and per diem), for total travel expenses of \$10,000. Contractor will also accrue \$50 in miscellaneous expenses.

Fee Budget

Note: A blended rate of \$150/hour was used for these hourly calculations – the rate billed for the project manager, assuming that she (Shawn Lingle) will be billing the greatest percentage of hours in each phase. The following break-down is based on \$139,950 remaining dollars after travel and expenses are removed.

Phase	Task #	Task	Hours	Est. \$150/hr	Est. Cost
1	1	Planning/Programming	60	\$150	\$9,000
1	2	Strategy Development	90	\$150	\$13,500
1	3	Creative Guides	80	\$150	\$12,000
1	4	Collateral Materials	35	\$150	\$5,250
1	5	Webpage	15	\$150	\$2,250
1	6	Media Strategy	10	\$150	\$1,500
1	7	Event Planning	10	\$150	\$1,500
Sub-Total Phase 1:			300		\$45,000
2	1	Strategy Development	260	\$150	\$39,000
2	2	Messaging	40	\$150	\$6,000
2	3	Collateral Materials	100	\$150	\$15,000
2	4	Website	25	\$150	\$3,750
2	5	Media Strategy	45	\$150	\$6,750
2	6	Event Planning	25	\$150	\$3,750
Sub-Total Phase 2:			495		\$74,250
3	1	Strategic Consulting/Strategy Dev.	138	\$150	\$20,700
Sub-Total Phase 3:			138		\$20,700
1--3	n/a	Travel/Misc. Expenses	-	-	\$10,000
Sub-Total Travel/Misc. Expenses:					\$10,000
TOTAL PROJECT BUDGET					\$149,950

Milestones/Timeline

Note that the timeline below builds off the implementation timeline developed by INIT, as communications/education activities are dependent on rollout events. Any delay in the equipment rollout will cause a similar delay in the communications effort. The activities included in this timeline include work that the Consortium and the Contractor will complete.

Phase 1 – Present day-August 2012

No milestones occur during this phase that will impact target audiences. Communications/education activities will focus on building awareness of the Connect Transit Card system and its benefits.

- **May 2012**
 - Kickoff/discovery session
 - Review of existing research/background materials
 - Meetings with key departments to discuss existing communications tools that can be incorporated into the Connect Transit Card effort
 - Determine milestone to celebrate with initial kick-off event – equipment arrives, site prep work, install begins or finishes, first card usage, etc.
- **June 2012**
 - Finalization of card branding

- Announcement of card branding – internally and externally, including social media (if available)
- Creation of positioning statement, initial messaging
- Preparation of top-level background materials for media
- Development of style guide
- Preparation of topline plan, timeline grid (w/customer and community/partner/stakeholder outreach recommendations)
- Develop protocol for keeping Consortium/employees in the loop, implement

- **July 2012**
 - Provide input into screenflow content (estimated timing)
 - Begin developing content/design for 3-4 page microsite
 - Develop initial 90-day plan, 30-day responsibility grid (to be updated monthly)
 - Develop media strategy (traditional and social), including milestone announcements

- **August 2012**
 - Cards Received***
 - Develop initial distribution plan
 - Create “coming soon” brochure/banners, employee guide
 - 30-day responsibility grid
 - Develop other “Coming Soon” campaign materials
 - Create new 90-day plan
 - 30-day responsibility grid
 - Develop initial message schedule

Phase 2 – September 2013-June 2013

- **September 2012** ***Six months prior to RT launch/Increased Communications***
 - Microsite go- live
 - Coming soon brochure distributed
 - Employee pocket guide distributed
 - 30-day responsibility grid
 - Update Consortium/employee communications protocol, implement
 - Update messaging
 - Implement “Coming Soon” campaign – bus/car cards, posters
 - Develop updated FAQs, add to microsite
 - Begin implementation of regular media outreach
 - Set up Facebook page (if desired) – update weekly
 - Set up Twitter account (if desired) – update weekly
 - Post photos on Flickr/videos on YouTube as available

- **October 2012**
 - 30-day responsibility grid
 - Develop tabletop display for customer outreach efforts
 - Update Facebook, Twitter outreach

- **November 2012**
 - Create new 90-day plan
 - 30-day responsibility grid
 - Update distribution plan, as needed
 - Begin communicating with specific RT partner/stakeholder groups on the transition process (RT staff will facilitate)
 - Revise message schedule
 - Update on microsite/Consortium main sites
 - Update Facebook, Twitter outreach

- **December 2012**
 - 30-day responsibility grid
 - Updated employee guide
 - Updated FAQs, add to microsite
 - Update on microsite/Consortium main sites
 - Update Facebook, Twitter outreach

- **January 2013**
 - 30-day responsibility grid
 - Begin communicating with specific RT customer groups on the transition process (RT staff will facilitate)
 - Prepare construction banners/A-frames, as needed for site prep work (must meet RT standards on RT sites)
 - Update on microsite/Consortium main sites
 - Start planning kickoff event for RT (RT staff will facilitate)
 - Update Facebook, Twitter outreach

- **February 2013**
 - Create new 90-day plan
 - Develop construction banners/A-frames, as needed
 - 30-day responsibility grid
 - Update distribution plan, as needed
 - Revise message schedule
 - Update on microsite/Consortium main sites
 - Begin more frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
 - Continue to post photos on Flickr/videos on YouTube, as available
 - Update Facebook, Twitter outreach

- **March 2013**
 - Begin planning go-live events for each system
 - 30-day responsibility grid
 - Update employee guide
 - Evaluate need for print advertising
 - Update FAQs, add to microsite
 - Update on microsite/Consortium main sites

- Start planning kickoff events for Elk Grove, Folsom, EDT and Yuba-Sutter
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach

▪ **April 2013**

RT Equipment Installed/Pilot Test

- ***Customer service center/customer call center set up***
- ***Cards introduced at retail outlets***
- ***Equipment testing***
- 30-day responsibility grid
- Wrap monthly passes with information on transition to Connect Transit Card
- Rack brochures on how to use the new system, how to get a card, reload, etc.
- Posters/bus and car cards reiterating key points of the brochures
- Evaluate need for radio advertising
- Update on microsite/Consortium main sites
- Media tour/demo of new equipment
- Plan kickoff event for Yolo
- RT kickoff event
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach

▪ **May 2013**

- Create new 90-day plan
- 30-day responsibility grid
- Wrap monthly passes with information notifying them this is their last paper pass/Connect Transit Card next month!
- Implement guerilla tactics one week prior to go-live
- Update FAQs
- Go live alert on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach
- Continued media outreach

▪ **June 2013**

RT Go Live

- 30-day responsibility grid

- Wrap monthly pass (now on Connect Transit Card) with details on how to use
- Update on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach
- Continued media outreach

Phase 3 – June 2013-January 2014*

- **June 2013**
 - Elk Grove Equipment Installed***
 - Folsom Stage Equipment Installed***
 - El Dorado Transit Equipment Installed***
 - 30-day responsibility grid
 - Kickoff events for Elk Grove, Folsom, EDT
 - Update on microsite/Consortium main sites
 - More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
 - Continue to post photos on Flickr/videos on YouTube, as available
 - Update Facebook, Twitter outreach
 - Continued media outreach
- **July 2013**
 - 30-day responsibility grid
 - Update FAQs
 - Update on microsite/Consortium main sites
 - More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
 - Continue to post photos on Flickr/videos on YouTube, as available
 - Update Facebook, Twitter outreach
 - Continued media outreach
- **Aug. 2013**
 - Yuba-Sutter Equipment Installed***
 - Elk Grove Go-Live***
 - Folsom Stage Go-Live***
 - El Dorado Transit Go-Live***
 - Yuba-Sutter Go-Live***

- Create new 90-day plan
- 30-day responsibility grid
- Kickoff event for Yuba-Sutter
- Update FAQs
- Update on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach
- Continued media outreach

▪ **Sept. 2013**

Yolo County Equipment Installed

Yolo County Go-Live

College/University Partners Transition

- 30-day responsibility grid
- Kickoff event for Yolo
- Update on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach
- Continued media outreach

▪ **Oct. 2013**

- 30-day responsibility grid
- Evaluate effort and determine behaviors that need correcting/additional information that needs to be distributed
- Prepare balance protection/autoload sign-up campaigns
- Update FAQs
- Update on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available
- Update Facebook, Twitter outreach
- Continued media outreach

▪ **Nov. 2013**

- Create new 90-day plan
- 30-day responsibility grid
- Update on microsite/Consortium main sites
- More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
- Continue to post photos on Flickr/videos on YouTube, as available

- Update Facebook, Twitter outreach
- Continued media outreach

- **Jan. 2014**

- Full System Go-Live**

- 30-day responsibility grid
 - Update FAQs
 - Update on microsite/Consortium main sites
 - More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
 - Continue to post photos on Flickr/videos on YouTube, as available
 - Update Facebook, Twitter outreach
 - Continued media outreach

- **Feb. 2014**

- Create post-launch 90-day plan
 - 30-day responsibility grid
 - More frequent Facebook/Twitter outreach – 2-3 times/week, depending on news
 - Continue to post photos on Flickr/videos on YouTube, as available
 - Update Facebook, Twitter outreach
 - Continued media outreach
 - Develop broad strategies for follow-up campaign to recruit new riders

**Roseville Transit and Placer County Transit may join the rollout soon. If so, this will push the Phase 3 timeline out further.*