

Metropolitan Transportation Commission
Operations Committee

June 9, 2023

Agenda Item 4d

**Contract Amendment – Clipper® Customer Education Services: Moore Iacofano
Goltsman, Inc. (MIG, Inc.) (\$2,700,000)**

Subject:

Recommendation to approve a contract amendment for MIG, Inc. in the amount of \$2,700,000 for the purpose of conducting customer education and marketing for the Next Generation Clipper System and Clipper START.

Background:

MTC annually contracts with a customer education firm to produce materials, manage the Clipper website, produce signage, manage Clipper social media, conduct ambassador outreach, conduct customer research, develop and implement customer education and marketing plans, and conduct Clipper START marketing, among other tasks. The current contract for this work is expiring June 30, 2023.

For the coming fiscal year, in addition to regular ongoing tasks, we anticipate the following specific tasks for the customer education contractor:

- Development and implementation of new web content, emails, social media and advertising to educate current customers about the changes in Clipper with the Next Generation System;
- Development and distribution of training materials for the operator marketing and customer service staff to remind them of changes in Clipper (this can be extended to other staff as well);
- Development and distribution of customer education materials transit operators can use to educate their customers;
- Presentations to advisory committees and other groups as needed;
- Continued marketing of Clipper mobile payment including ambassador outreach as needed;

- Biennial Clipper customer and non-customer research, including surveys, focus groups, individual interviews and other qualitative methods.

In addition, the contractor will be conducting all marketing for the Clipper START program, including developing creative, purchasing media and placing ads through a variety of methods. This work will also include an equity review to ensure that all marketing materials and tactics are consistent with MTC's equity platform. This advertising work will be complemented by outreach conducted by community-based organizations through a separate contracting process.

In 2022, MTC selected MIG, Inc. through a mini procurement process for a new contractor after issuing a Request for Proposals to nine firms who had qualified for MTC's 2020 Electronic Payments Consultant Assistance Bench. A contract with MIG, Inc., which this proposed amendment would extend, was approved by this Committee on May 13, 2022.

Issues:

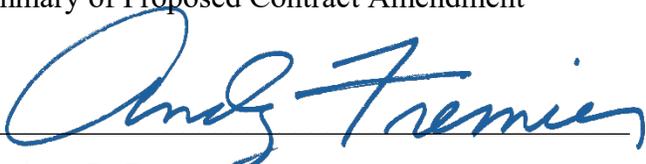
None identified.

Recommendation:

Staff recommends that the Operations Committee authorize the Executive Director to negotiate and enter into a contract amendment with MIG, Inc. in an amount not to exceed \$2,700,000 and to extend the contract period to June 30, 2024, to provide customer education and marketing for Clipper, particularly the Next Generation Clipper System and the Clipper START program, as described above.

Attachments:

- Attachment A: Disadvantaged Business Enterprise and Small Business Enterprise Status
- Request for Committee Approval – Summary of Proposed Contract Amendment



Andrew B. Fremier

Attachment A

Disadvantaged Business Enterprise and Small Business Enterprise Status

	Firm Name	Role on Project	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime Contractor	MIG, Inc.	Prime contractor	No		No	
Subcontractor	Zeba Media	Media buying	No		No	
Subcontractor	Digital Mark Group	Media buying	No		No	
Subcontractor	Center for Accessible Technology	Accessibility	No		No	
Subcontractor	Bombilla	Creative design	No		No	
Subcontractor	Caribou Public Relations	Ambassador outreach	Yes	41619	No	
Subcontractor	EMC Research	Research	No		Yes	SLEB 06-90866 SBE 541910
Subcontractor	Ion Translations	Translation services	No		Yes	SLEB 07-90991

*Denotes certification by the California Unified Certification Program (CUCP).

**Denotes certification by the State of California.

Request for Committee Approval

Summary of Proposed Contract Amendment

Work Item No.: 1220/1311

Consultant: Moore Iacofano Goltsman, Inc. (MIG, Inc.)
Berkeley, CA

Work Project Title: Clipper Customer Education

Purpose of Project: To provide customer education and marketing for Clipper and associated programs

Brief Scope of Work: Provide advertising, material development, social media management, research, presentations, training, ambassador outreach and other tasks for the Next Generation Clipper System and Clipper START as needed

Project Cost Not to Exceed: Existing Contract: \$2,400,000
This Amendment \$2,700,000
Total Contract Value After This Amendment: \$5,100,000

Funding Source: SB1 State of Good Repair, Clipper Card Fee Account, Clipper Float Account, Clipper Inactive Card Funds, Regional Measure 2 Marketing, Regional Measure 2 Operating, State Transit Assistance, Low Carbon Transit Operations Program

Fiscal Impact: Pending approval of the MTC Fiscal Year 2023-24 budget

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with MIG, Inc. for customer education services as described above and in the Operations Committee Summary Sheet dated June 9, 2023, and that the Chief Financial Officer is authorized to set aside \$2,700,000 for such contract amendment, subject to approval of the FY 2023-24 agency budget.

Operations Committee:

David Rabbitt, Chair

Approved: June 9, 2023