

## Clipper® Executive Board

June 1, 2026

Agenda Item 2f – 26-0543

**Clipper Customer Education and Outreach Contract Actions: i. Contract Amendment - Customer Education Support: Moore Iacofano Goltsman, Inc. (MIG) (\$3,200,000); ii. Contract Amendment - Clipper START Outreach: Caribou Public Relations, Inc. (Caribou) (\$450,000)**

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### **Subject:**

Request for approval of the listed consultant contract actions to i. add \$3,200,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and Clipper START program and ii. add \$450,000 to the Caribou contract to provide Clipper START CBO outreach assistance, subject to approval of the fiscal year (FY) 2026-27 MTC Budget.

### **Background:**

#### MIG

MTC contracts with a customer education firm to develop and implement advertising campaigns, produce materials, manage the Clipper website, produce signage, manage Clipper social media, and conduct customer research. The contractor also plans, develops and implements customer education and marketing for both Clipper generally and the Clipper START program, among other tasks. The current contract for this work expires June 30, 2026.

In 2022, MTC selected MIG through a mini procurement process for a new contractor after issuing a Request for Proposals to nine firms who had qualified for MTC's Consultant – 2020 Electronic Payments Consultant Assistance – Cycle 1. Their contract was approved by the Clipper Executive Board and MTC's Operations Committee.

For the coming fiscal year, staff anticipates the customer education contractor will develop and implement a wide range of tactics to educate current customers, new customers, specially targeted groups (such as families) and stakeholders about the Next Generation Clipper system.

Tasks will include but are not limited to:

- Social media campaigns;
- A minimum of 15 educational videos;
- Brochures for customers;
- Large-scale advertising campaigns;

- Training materials for the operator marketing and customer service staff to serve as quick reference guides and remind them of changes in Clipper;
- Customer education materials transit operators can use to educate their customers;
- Presentations to citizen advisory committees and other groups as needed;
- Media events and other media relations; and
- Continued marketing of Clipper mobile payment including ambassador outreach as needed.

The customer education contractor also provides all advertising services to promote growth of the Clipper START program. In 2026-27, that will include but not be limited to:

- Videos of testimonials and personal stories reflecting actual and potential customers;
- Social media campaigns on Facebook, Instagram and TikToks;
- Social media influencer campaign;
- Direct mail;
- Community-based organization and transit agency toolkits; and
- Updates to the program website.

Staff are requesting to add funds and extend the contract term in the interest of continuity of performance, as changes in the project schedule have extended the timeline for the customer transition to the Next Generation system over FY 2025-26 and FY 2026-27. Staff believe that the administrative time and cost to transition to a different firm to assist with the customer transition would not be cost-effective, as it would take too long for a new firm to get up to speed with the ongoing campaign strategies and develop the necessary relationships with various partners who have already been engaged on this effort.

### Caribou

Clipper also contracts with a firm to conduct community-based outreach in support of the Clipper START means-based transit fare discount program. Since May 2023, the contractor service in this capacity has been Caribou Public Relations, Inc. (Caribou). This contract is set to expire June 30, 2026.

For fiscal year 2026-27, we anticipate the following specific tasks for the outreach contractor:

- Contact community-based organizations (CBOs) to schedule participation in existing events or schedule special Clipper START-specific events to educate participants about the program and how to apply.
- Post flyers and posters about Clipper START in public places such as grocery stores, laundromats and other locations in equity priority communities. At the same time, distribute brochures to libraries for distribution.
- Subcontract with up to 16 CBOs to have them conduct sustained targeted outreach to their service populations.

Caribou is on the Consultant Bench: 2020 Electronic Payments Consultant – Cycle 1. In April 2023, MTC selected Caribou through a direct select process approved by the MTC Executive Director.

Staff are requesting to add funds and extend the contract term in the interest of continuity of performance, as changes in the project schedule have extended the timeline for the customer transition to the Next Generation system over FY 2025-26 and FY 2026-27. Staff believe that the administrative time and cost to transition to a different firm would not be cost-effective, as it would take too long for a new firm to get up to speed with the ongoing campaign strategies and develop the necessary relationships with various partners who have already been engaged in this effort.

**Issues:**

None identified.

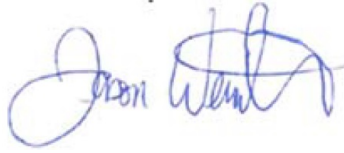
**Recommendations:**

Staff recommends the Clipper Executive Board authorize the Executive Director or designee to i. negotiate and enter into a contract amendment with MIG in an amount not to exceed \$3,200,000 for customer education consultant services to the Clipper program and ii. to enter into a contract amendment with Caribou in an amount not to exceed \$450,000 for Clipper START outreach, subject to approval of the FY 2026-27 MTC Budget.

**Attachments:**

- Attachment A: Requests for Committee Approval – Summary of Proposed Contract Amendment (MIG)

- Attachment B: Requests for Committee Approval – Summary of Proposed Contract Amendment (Caribou)



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Jason Weinstein

## **Request for Committee Approval**

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### **Summary of Proposed Contract Amendment**

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

Work Project Title: Clipper Customer Education

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

Brief Scope of Work: Provide advertising, social media management, research, training, ambassador outreach and other tasks for Clipper and Clipper START

Project Cost Not to Exceed: \$3,200,000 (this amendment)  
Total contract amount including amendments before this amendment = \$11,600,000  
Total contract amount with this amendment = \$14,800,000

Funding Source: Clipper Card Fee Account, State Transit Assistance

Fiscal Impact: Funds subject to availability in the FY 2026-27 MTC agency budget.

Motion by Committee: That the contract amendment with MIG for the purposes described above and the Clipper Executive Board Summary Sheet dated June 1, 2026, is hereby approved Clipper Executive Board, subject to approval of the FY 2026-27 MTC Budget.

Clipper Executive Board:

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Julie Kirschbaum, Chair

Approved: June 1, 2026

## Request for Committee Approval

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### Summary of Proposed Contract Amendment

Consultant: Caribou Public Relations, Inc.  
Berkeley, CA

Work Project Title: Clipper START Outreach Services

Purpose of Project: To conduct outreach to educate people about the Clipper START program and to encourage enrollment

Brief Scope of Work: Conduct outreach through community-based organizations, schedule and staff outreach events, and post information about program

Project Cost Not to Exceed: \$450,000 (this amendment)  
Total contract amount including amendments before this amendment = \$1,320,000  
Total contract amount with this amendment = \$1,770,000

Funding Source: State Transit Assistance

Fiscal Impact: Pending approval of the MTC Fiscal Year 2026-27 budget

Motion by Committee: That the contract amendment with Caribou Public Relations, Inc. for Clipper START outreach services described above and in the Clipper Executive Board Summary Sheet dated June 1, 2026 is hereby approved by the Clipper Executive Board, subject to approval of the FY 2026-27 MTC Budget.

Clipper Executive Board:

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Approved: June 1, 2026