

## Clipper® Executive Board

June 2, 2025

Agenda Item 3b

### **Clipper Customer Education and Outreach Contracts: Contract Amendments – Moore Iacofano Goltzman, Inc. (MIG) (\$3,100,000); Caribou Public Relations, Inc. (Caribou) (\$400,000)**

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#### **Subject:**

Request for approval of the above-referenced consultant contract actions to add \$3,100,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

#### **Background:**

MTC annually 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 in general 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 strategies to educate current customers, new customers, special target groups (such as families and visitors) and stakeholders about the Next Generation Clipper system. Tasks will include but are not limited to:

- Development and deployment of new web content and design;
- Large-scale email distribution campaigns;
- Social media campaigns;
- A minimum of 15 educational videos;
- Brochures for customers;

- Large-scale advertising campaigns;
- Presentations for executives and other stakeholders;
- 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 committee and other groups as needed;
- Media events and other media relations;
- 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 2025-26, that will include but not be limited to:

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

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 serving in this capacity has been Caribou. This contract is set to expire June 30, 2026.

For fiscal year 2025-2026, 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; and

- Subcontract with up to 16 CBOs to have them conduct targeted outreach to their service populations.

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

Caribou is a disadvantaged business enterprise.

**Issues:**

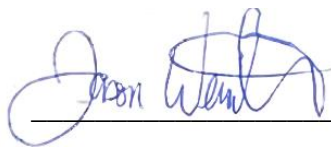
None identified.

**Recommendations:**

Staff recommends the Clipper Executive Board authorize the MTC Executive Director or designee to negotiate and enter a contract amendment with MIG in an amount not to exceed \$3,100,000 for customer education consultant services to the Clipper and Clipper START programs and to enter into a contract amendment with Caribou in an amount not to exceed \$400,000 for Clipper START outreach subject to approval of the MTC 2025-26 budget.

**Attachments:**

- None



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Jason Weinstein

## Request for Committee Approval

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### Summary of Proposed Contract Amendment

Work Item No.:	1220/1311
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, 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:	\$3,100,000 (this amendment)  Total contract amount including amendments before this amendment = \$8,500,000  Total contract amount with this amendment = \$11,600,000
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 2025-2026 budget
Motion by Committee:	That the contract amendment with MIG for customer education services as described above and in the Clipper Executive Board Summary Sheet dated June 2, 2025 is hereby approved by the Clipper Executive Board.
Regional Network Management Committee:	
	<hr/> Robert Powers, Chair
Approved:	June 2, 2025

## Request for Committee Approval

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### Summary of Proposed Contract Amendment

Work Item No.:	1311
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:	\$400,000 (this amendment)  Total contract amount including amendments before this amendment = \$920,000  Total contract amount with this amendment = \$1,320,000
Funding Source:	State Transit Assistance, Low Carbon Transit Operations Program
Fiscal Impact:	Pending approval of the MTC Fiscal Year 2025-2026 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 2, 2025 is hereby approved by the Clipper Executive Board.
Regional Network Management Committee:	
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Approved:	June 2, 2025