

Agenda Item 3b

Bay Area Metro Center 375 Beale Street San Francisco, CA 94105 TEL 415.778.6700 WEB www.mtc.ca.gov

TO: Clipper® Executive Board DATE: March 13, 2017

FR: Carol Kuester

RE: <u>Contract Actions – Customer Research, Education and Outreach for the Clipper[®] Program</u>

- i. Contract Amendment Customer Information Services: MIG, Inc. (\$550,000)
- ii. Contract Distribution and Communications Planning and Support Services: Synapse Strategies (\$260,000)
- iii. Contract Clipper[®] Customer Education/Outreach Services: Caribou Public Relations (\$200,000)

Background and Overall Strategy

MTC engages contractors to assist with the strategic planning and implementation of customer research, education and outreach initiatives intended to benefit current and potential Clipper[®] customers. The Clipper[®] customer communications program is built around four core tasks: supporting system expansion; building customer awareness of system changes; improving the customer experience; and targeting cash-paying transit riders in order to increase adoption.

The work plan for the customer research and communications program is primarily driven by work completed by Cubic under the Clipper® Contract, including the expansion of Clipper® to new operators, integration with transit operator equipment, operator-initiated fare policy changes, and backend operational changes that affect the customer experience. As part of MTC's ongoing mandate to provide Clipper® information and outreach to Title VI-protected populations, MTC supports one or more initiatives each fiscal year targeting this segment of transit riders. MTC also strives to support transit operator fare policy changes that are implemented outside of the Clipper® system, but create demand for Clipper® cards and information. For example, in past years MTC has assisted VTA with the elimination of its paper day pass and SFMTA with the introduction of a discount for customers who pay with Clipper® instead of cash. Transit operators regularly submit requests to MTC to assist with their Clipper® education efforts during a bi-monthly call on which all the operators are invited to participate or by submitting requests to their respective MTC staff liaisons.

During FY 2017-18, MTC will invest in ongoing C2 public engagement efforts as directed by this Board. Current initiatives include soliciting feedback on the Draft Request for Proposal for System Integrator for Industry Review, maintaining <u>futureofclipper.com</u>, documenting public comments, and conducting focus groups of transit riders. The FY 2017-18 work plan will include Clipper[®]'s biennial customer satisfaction survey, as well as a survey of cash-paying transit riders. We anticipate these research efforts will help us identify opportunities to improve the current system and inform the next-generation Clipper[®] system design process.

During the course of FY 2017-18, MTC will provide ongoing information about customer research and education activities in the Clipper® Program Update Report, which is distributed monthly to transit operator staff.

Attachment A provides an overview of the draft Clipper® customer education work plan for FY 2017-18 along with a summary of projects completed during FY 2015-16 and FY 2016-17.

Contract Actions

Staff recommends that the Executive Board approve the following contract actions:

a) Contract Amendment - Customer Information Services: MIG, Inc. (MIG) (\$550,000)

MIG is prequalified to enter into contracts with MTC to perform work in the areas of strategic planning, creative design and online services. The original contract was entered into in July, 2016 for \$550,000.

The scope of work for this contract amendment includes support for research and public engagement for the development of the next-generation Clipper® system. MIG will continue to assist with the implementation of customer education initiatives related to the launch of Clipper® on Sonoma Marin Area Rail Transit (SMART). MIG also will support ongoing operational changes, such as fare policy changes and Clipper® system improvements, by updating the Clipper® website and developing materials as needed.

b) Contract – Distribution and Communications Planning and Support Services: Synapse Strategies (Synapse) (\$260,000)

Synapse is prequalified as part of MTC's Clipper® Electronic Payment Implementation and Operations bench procurement. Tasks under this contract include operational reporting and strategic planning and management of the public engagement process for the next-generation Clipper® system, as well as general education initiatives and research.

iii. Contract – Clipper® Customer Education/Outreach Services: Caribou Public Relations (Caribou) (\$200,000)

Caribou is prequalified as part of MTC's Clipper[®] Electronic Payment Implementation and Operations bench procurement. Under the proposed contract, Caribou will provide Clipper[®] outreach services to transit riders, including Title VI-protected customers.

Recommendation

Staff is recommending approval of three contracts or contract amendments with MIG, Inc. (\$550,000), Synapse Strategies (\$260,000), and Caribou Public Relations (\$200,000). MTC will return to the Executive Board for authorization of any additional contracts or contract amendments needed to support the customer research, education and outreach program that exceed the MTC Executive Director's signature authority.

Carol Kuester

Attachment:

- Attachment A: Clipper® Customer Education Program Activities (FY 2015-16 through FY 2017-18)
- Attachment B: Clipper[®] Customer Research, Education, and Outreach Program

REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

Summary of Proposed Contract Amendment

Contractor: MIG, Inc. Berkeley, CA Work Project Title: Public Awareness and Customer Education Services Continue to provide assistance with Clipper[®] research Purpose of Amendment: and customer education efforts Brief Scope of Work: Provide customer education information through printed materials, content on clippercard.com and other websites, and, where appropriate, paid media, i.e., advertisements Project Cost Not to \$550,000 (this amendment) Exceed: Total Contract value including amendments before this amendment = \$550,000Total contract amount with this amendment = \$1,100,000 Regional Measure 2 Marketing and Operations, STA, STP Funding Source: Fiscal Impact: Funds dependent on the approval of the FY 2017-18 MTC agency budget Motion: That a contract amendment with MIG, Inc., for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget. **Executive Board:** Denis Mulligan, Chair

Date: March 20, 2017

Approved:

REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

Summary of Proposed Contract

Contractor:	Synapse Strategies		
	Oakland, CA		
Project Title:	Distribution and Communications Planning and Support Services		
Purpose of Contract:	Provide strategic planning and oversight for customer education and communications functions		
Brief Scope of Work:	Oversee in-person customer education/outreach services; planning and support services related to Clipper [®] marketing and communications initiatives		
Project Cost Not to Exceed:	\$260,000		
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP		
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.		
Motion:	That a contract with Synapse Strategies, for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.		
Executive Board:			
	Denis Mulligan, Chair		
Approved:	Date: March 20, 2017		

REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

Summary of Proposed Contract

Contractor:	Caribou Public Relations
	San Francisco, CA
Project Title:	Clipper® Customer Education/Outreach Services
Purpose of Amendment:	On-call public outreach services
Brief Scope of Work:	Provide general education and communicate the benefits of Clipper® to Bay Area transit riders, including Title VI-protected customers
Project Cost Not to Exceed:	\$200,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.
Motion:	That a contract with Caribou Public Relations for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper [®] Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.
Executive Board:	
	Denis Mulligan, Chair

Date: March 20, 2017

Approved:

Attachment A Clipper® Customer Education Program Activities (FY 2015-16 through FY 2017-18)

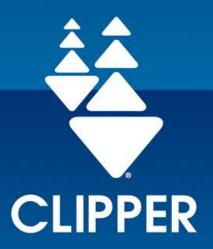
Fiscal Year	Activity	Primary	Secondary	Tactics
		Audience	Audience	
	SMART Launch (promotional fare) C2 Public Engagement	SMART Current and potential Clipper customers	 Golden Gate Transit/Ferry Marin Transit Petaluma Transit Santa Rosa CityBus Sonoma County Transit Stakeholders, including community- based organizations 	 Operator microsite Social media announcements Website announcements Content and programming updates to clippercard.com Advertising Outreach events Card sleeve Take-one with retailer list Customer service training Content and programming updates to futureofclipper.com Stakeholder interviews Focus groups Discussion guide for operator
	Cash-customer	Regional	(CBOs), employers	presentationsIntercept survey and report
	Survey			, , , , , , , , ,
2017-18 (draft)	Biennial Customer Satisfaction Survey	Regional		Intercept survey and report
	Card Sales at BART Ticket Machines	• BART	 AC Transit County Connection Tri Delta Transit Union City Transit WestCAT Wheels 	 Social media announcements Website announcements Content and programming updates to clippercard.com Customer service training
	Clipper® is Everywhere Campaign	• Regional		 Social media announcements Website announcements Advertising Car cards Card sleeve Outreach events
	Website Improvements	 Dumbarton Express Clipper Direct participants Tourists 		 Dumbarton Express microsite Clipper[®] Direct website Tourist-focused page

Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
	Communications Material Archive	Regional		Development of archive for creative files and messaging for transit operator use
2017-18 (continued)	Miscellaneous regional events	BART Transbay Transit Center		 BART National Night Out outreach events Outreach events for BART station and Transbay Transit Center openings Content and programming updates to clippercard.com License agreements updates
	Miscellaneous fare policy and service changes	• TBD		 Content and programming updates to clippercard.com Social media announcements Website announcements Emails to targeted registered customers Clipper® Service Bureau coordination
	SFMTA Fare Differential	• SFMTA	• BART • SamTrans	Social media announcements Website announcements Content and programming updates to clippercard.com Streamlined website landing page Advertising: digital banner ads, 30-second animated video Car cards Retailer signage Ticket machine decals Card sleeve Take-one with retailer list Outreach events (62)
2016-17	C2 Public Engagement	Current and potential Clipper® customers	• Stakeholders, including community-based organizations (CBOs), employers	 Social media announcements Website announcements Content and programming updates to futureofclipper.com Summary of Draft Request for Proposal for System Integrator for Industry Review Stakeholder interviews Focus groups (4) Opt-in online survey 30-second video Car cards Take-one Discussion guide for operator presentations

Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
	Relocation of Clipper® Customer Service Center at Embarcadero BART/Muni Metro Station	Current and potential Clipper® customers		 Signage for exterior walls, windows and stanchions Social media announcements
	Union City Transit Launch	• Union City Transit	• AC Transit • BART	 Operator microsite Social media announcements Website announcements Press release Content and programming updates to clippercard.com New brochure Revisions to existing brochures Ticket office decals Vehicle decals Advertising Outreach events (TBD) Card sleeve Customer service training
2016-17 (continued)	SMART Launch (free period)	• SMART	 Golden Gate Transit/Ferry Marin Transit Petaluma Transit Santa Rosa CityBus Sonoma County Transit 	 Social media announcements Website announcements Press release Content and programming updates to clippercard.com New brochure Revisions to existing brochures Ticket office decals Card sleeve Station signage Outreach events (TBD) Customer service training
	Off-Peak Rider Campaign	Potential Clipper® customers	• TBD	 Advertising Social media announcements Website announcements Outreach events (TBD)
	Ford GoBike Launch	Current and potential Clipper® customers		 Social media announcements Website announcements Press release Content and programming updates to clippercard.com
	Website improvements	Current and potential Clipper® customers		 Refresh and standardization of microsite content Updated value availability language Streamlined home page menu options New transit operator logos as needed New header and footer

Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
	Miscellaneous regional events	BART Current and potential Clipper® customers		 BART National Night Out outreach events (6) Privacy policy updates Customer service training for The Hub
2016-17 (continued)	Miscellaneous fare policy and service changes	 AC Transit Golden Gate Transit/Ferry San Francisco Bay Ferry SFMTA 		 Content and programming updates to clippercard.com Social media announcements Website announcements Emails to targeted registered customers Signage for San Francisco Bay Ferry Clipper® Service Bureau coordination
	East Bay Bus Services Launch	County Connection Tri Delta Transit WestCAT Wheels	BART AC Transit	 New brochure Operator microsites (4) Social media announcements Website announcements Press release Content and programming updates to clippercard.com Revisions to existing brochures Advertising: on-vehicle, connecting BART stations, transit shelters, digital and print (including Chinese and Spanish-language media), local radio Ticket office decals Vehicle decals Outreach events (33) Customer service trainings (8)
2015-16	Sonoma/101 Corridor Launch	 Petaluma Transit Santa Rosa CityBus Sonoma County Transit 	Golden Gate Transit	 New brochure Operator microsites (3) Social media announcements Website announcements Press release Content and programming updates to clippercard.com Updates to existing brochures Advertising: on-vehicle, digital and print (including Spanish-language media), local radio Ticket office decals Vehicle decals Outreach events (20) Customer service trainings (4)
	VTA Paper Day Pass Elimination	• VTA		 Content updates to clippercard.com Updates to existing brochures Take-one with retailer information Outreach events (25)

Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
	WestCAT Lynx 31-Day Pass	WestCAT		Social mediaOutreach events (6)
	Cash Customer Campaign	AC TransitSamTrans	BARTCaltrainSFMTAVTA	 Advertising: on-vehicle, transit shelter, digital, mobile and Comcast banner ads during broadcasts of A's and Giants games (3 languages) Social media announcements Website announcements Outreach events
2015-16 (continued)	Miscellaneous regional events	• BART • SFMTA	 AC Transit Caltrain Golden Gate Transit/Ferry SamTrans SF Bay Ferry 	 BART National Night Out outreach events (6) SFSU Welcome Days outreach event BART Blue Sky Festival outreach event Super Bowl commemorative card promotion via website updates, social media announcements and retail signage
	Miscellaneous fare policy and service changes	 BART Caltrain Golden Gate Transit/Ferry SamTrans SF Bay Ferry VINE VTA 		Content and programming updates to clippercard.com Social media announcements Website announcements Retailer signage (multilingual) Revisions to existing brochures Emails to targeted registered customers Clipper® Service Bureau coordination





Customer Research, Education and Outreach for the Clipper® Program

March 20, 2017 Clipper® Executive Board

Contract Actions for Approval

- Synapse Strategies (\$260k)
 - Strategic planning and management of the communications program, including the C2 public engagement process
- MIG, Inc. (\$550k)
 - Development of digital and print materials
 - Management of social media and futureofclipper.com
 - Oversight of customer research subcontractors
- Caribou Public Relations (\$200k)
 - Outreach to transit riders, including Title VI-protected customers



Development of Annual Work Plan

- Support for work completed by the Clipper® Contractor
 - System expansion and integration
 - Fare policy changes
- C2 public engagement
- Transit operator requests for assistance
 - Clipper® discounts and elimination of paper products
 - Informational signage
- Focus on Title VI-protected populations



Fiscal Year 2016-17 Activities













Draft Work Plan for FY 2017-18

- SMART launch
 - Clipper® is everywhere!
- C2 public engagement
 - Cash-customer survey
- Biennial customer satisfaction survey
- Card sales at BART ticket machines
- Website improvements
 - Incorporate research findings
 - Tourist-focused information
- Communications material archive

