

Metropolitan Transportation Commission
Regional Network Management Committee

May 10, 2024

Agenda Item 3d

**Contract Amendment – Clipper® Customer Education Services: Moore Iacofano
Goltsman, Inc. (MIG) (\$3,600,000)**

Subject:

Request for authorization to enter into a contract amendment with Moore Iacofano Goltsman, Inc. (MIG) to continue providing customer education consulting services to the Clipper program.

Background:

Clipper annually contracts with a customer education firm. 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 2020 Electronic Payments Consultant Assistance Bench. MIG’s contract was approved by the Clipper Executive Board in April 2022 and MTC’s Operations (now Regional Network Management) Committee in May 2022. The current contract for this work is expiring June 30, 2024.

Ongoing Customer Education:

For the coming fiscal year, staff anticipates the customer education contractor tasks will include but not be limited to:

- Production of brochures and other materials;
- Making changes to and otherwise manage the Clipper website;
- Production of signage;
- Management of Clipper social media, including responding to customer requests through posts and direct messages;
- Conducting ambassador outreach;
- Conducting customer research; and
- Development and implementation of customer education and marketing campaigns, among other tasks.

Next-Generation Clipper Customer Education

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, special target

groups (such as families) and stakeholders about the Next-Generation Clipper system. Tasks will include but are not be 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 committees and other groups as needed;
- Media events and other media relations; and
- Continued marketing of Clipper mobile payment including ambassador outreach as needed.

Clipper START Advertising

The customer education contractor also provides all advertising services to promote growth of the Clipper START program. In 2024-25, 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 TikTok featuring videos;
- Social media influencer campaign;
- Direct mail;
- Community-based organization and transit agency toolkits; and
- Updates to the program website.

Attachment A lists MIG's subcontractors on this contract, including those subcontractors' small business and disadvantaged business enterprise status.

Issues:

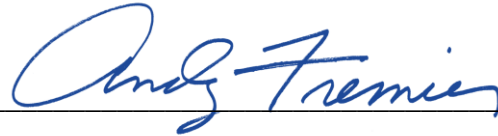
None identified.

Recommendations:

Staff recommends the Regional Network Management Committee authorize the Executive Director or designee to negotiate and enter into a contract amendment with MIG in an amount not to exceed \$3,600,000 for customer education consultant services to the Clipper program, subject to the approval of the Clipper Executive Board at its May 20, 2024 meeting, and to extend the contract to June 30, 2025.

Attachments:

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



Andrew B. Fremier

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	Outreach	Yes	41619	No	
Subcontractor	EMC Research	Research	No		Yes	SLEB 06- 90866 SBE 541910
Subcontractor	Ion Translations	Translation	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).
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: \$3,600,000 (this amendment)
Total contract amount including amendments before this amendment = \$4,900,000
Total contract amount with this amendment = \$8,500,000

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 2024-25 budget

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract with MIG for customer education services as described above and in the Regional Network Management Committee Summary Sheet dated May 10, 2024, and that the Chief Financial Officer is authorized to set aside \$3,600,000 for such contract, subject to the approval of the Clipper Executive Board and approval of the FY 2024-25 agency budget.

Regional Network
Management Committee:

David Rabbitt, Chair

Approved: May 10, 2024