



METROPOLITAN
TRANSPORTATION
COMMISSION

Agenda Item 4g
Bay Area Metro Center
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Memorandum

TO: Operations Committee

DATE: May 4, 2018

FR: Executive Director

W. I. 1221

RE: Contract Actions – Clipper® Customer Research, Education, Outreach, and Operational Monitoring Contracts

- i. Contract Amendment – Customer Information Services: MIG, Inc. (\$625,000)
- ii. Contract Amendment – Distribution and Communications Planning and Support Services: Synapse Strategies (\$250,000)
- iii. Contract Amendment – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)
- iv. Contract Amendment – Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (\$200,000)

Background

MTC engages contractors to assist with the strategic planning and implementation of customer research, education and outreach initiatives 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 efforts are conducted in consideration of MTC's ongoing mandate to provide Clipper® information and outreach to Title VI and Environmental Justice-protected populations.

MTC also strives to support transit operator fare policy and service changes that create demand for Clipper® cards and information. MTC partnered with BART this past year to support the expansion of the eligibility for youth discounts and the introduction of a discount for customers who pay with Clipper® instead of tickets. We are positioned to use lessons learned from this successful initiative to support other operators who choose to launch or expand discounts for Clipper® customers. During FY 2018-19, we also anticipate supporting AC Transit, BART, VTA and WETA as they begin service to new stations and terminals or enhance existing service.

Recommendation

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into the following contract actions. All of the following consultants are part of the pre-qualified Electronic Payment Implementation and Operations consultant bench competitively selected by MTC in May 2016:

- i. **Contract Amendment – Customer Information Services: MIG, Inc. (MIG) (\$625,000)**

Under this contract amendment, MIG will continue to implement campaigns to increase adoption, assist with public engagement for the Next-Generation Clipper® (C2) system, and prepare updates to online and print materials in support for ongoing operational changes, such as fare policy changes and Clipper® system improvements. The current

contract amount is \$1,300,000; the proposed amendment would add \$625,000. This contract will expire on June 30, 2019.

MIG is neither a disadvantaged business enterprise (DBE) nor a small business enterprise (SBE) and currently has no subcontractors with these designations.

ii. Contract Amendment – Distribution and Communications Planning and Support Services: Synapse Strategies (Synapse) (\$250,000)

Tasks under this contract amendment include operational reporting and strategic planning and management of the public engagement process for the C2 system, as well as general education initiatives and research. The current contract amount is \$260,000; the proposed amendment would add \$250,000, extending the period of performance for one year through June 30, 2019.

Synapse is a certified DBE.

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

Under the proposed contract amendment, Caribou will provide Clipper® outreach services to transit riders, including Title VI-protected customers. The current contract amount is \$200,000; the proposed amendment would add \$200,000, extending the period of performance for one year through June 30, 2019.

Caribou is a certified DBE.

iv. Contract Amendment – Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (RDA) (\$200,000)

Under this contract amendment, RDA will continue to provide operational monitoring and reporting services to support the communications and outreach program, including reporting on the outcomes of outreach activities, tracking discounted Clipper® card distribution, and monitoring customer service issues. The current contract amount is \$380,000; the proposed amendment would add \$200,000, extending the period of performance for one year through June 30, 2019.

RDA is neither a DBE nor a SBE and currently has no subcontractors.

These items were approved by the Clipper® Executive Board on April 16, 2018.



Steve Heminger

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REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: MIG, Inc.
Berkeley, CA

Work Project Title: Public Awareness and Customer Education Services

Purpose of Amendment: Provide assistance with Clipper® research, communications and customer education efforts

Brief Scope of Work: Provide customer education information through printed materials, online content and, where appropriate, paid media, i.e., advertisements

Project Cost Not to Exceed: \$625,000 (this amendment)
Total Contract value including amendments before this amendment = \$1,300,000
Total contract amount with this amendment = \$1,925,000

Funding Source: Regional Measure 2 Marketing and Operations, STA, STP

Fiscal Impact: Funds dependent on the approval of the FY 2018-19 MTC agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with MIG, Inc. to provide the services as described above and in the Executive Director's memorandum dated May 4, 2018; and that the Chief Financial Officer is authorized to set aside \$625,000 for such amendment, subject to approval of the FY 2018-19 agency budget.

Operations Committee:

Dave Cortese, Chair

Approved: Date: May 11, 2018

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: Synapse Strategies
Oakland, CA

Work Project Title: Operational Reporting and Communications Planning and Support Services

Purpose of Amendment: Support operational reporting and provide strategic planning and oversight for customer education and communications functions

Brief Scope of Work: Oversee customer education and outreach services; planning and support services related to Clipper® operational reporting and communications initiatives

Project Cost Not to Exceed: \$250,000 (this amendment)
Total Contract value including amendments before this amendment = \$260,000
Total contract amount with this amendment = \$510,000

Funding Source: Regional Measure 2 Marketing and Operations, STA, STP

Fiscal Impact: Funds dependent on the approval of the FY 2018-19 MTC agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Synapse Strategies to provide the services as described above and in the Executive Director's memorandum dated May 4, 2018; and that the Chief Financial Officer is authorized to set aside \$250,000 for such amendment, subject to approval of the FY 2018-19 agency budget.

Operations Committee:

Dave Cortese, Chair

Approved: Date: May 11, 2018

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement Amendment

Work Item No.:	320-1221
Contractor:	Caribou Public Relations San Francisco, CA
Work 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 (this amendment) Total Contract value including amendments before this amendment = \$200,000 Total contract amount with this amendment = \$400,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2018-19 MTC agency budget.
Motion by Committee:	That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Caribou Public Relations to provide the services as described above and in the Executive Director's memorandum dated May 4, 2018; and that the Chief Financial Officer is authorized to set aside \$200,000 for such amendment, subject to approval of the FY 2018-19 agency budget.
Operations Committee:	<hr/> Dave Cortese, Chair
Approved:	Date: May 11, 2018

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement Amendment

Work Item No.: 320-1221

Contractor: Research Development Associates, Inc.
Oakland, CA

Work Project Title: Operational Monitoring and Reporting Services

Purpose of Amendment: Provide information about Clipper® program performance through operational monitoring and reporting

Brief Scope of Work: Operational monitoring and reporting on discounted Clipper® card distribution, customer service issues, and effectiveness of outreach activities, among other program areas

Project Cost Not to Exceed: \$200,000 (this amendment)
Total Contract value including amendments before this amendment = \$380,000
Total contract amount with this amendment = \$580,000

Funding Source: TCP, STP, CMAQ, STA, Regional Measure 2 Operating

Fiscal Impact: Funds dependent on the approval of the FY 2018-19 MTC agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Research Development Associates, Inc. to provide the services as described above and in the Executive Director's memorandum dated May 4, 2018; and that the Chief Financial Officer is authorized to set aside \$200,000 for such amendment, subject to approval of the FY 2018-19 agency budget.

Operations Committee:

Dave Cortese, Chair

Approved: Date: May 11, 2018