



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: April 8, 2019

FR: Carol Kuester

RE: Contract Actions – Customer Research, Education and Outreach for the Clipper® Program

- i. Contract Amendment – Customer Information Services: MIG, Inc. (\$770,000)
- ii. Contract Amendment – Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (\$270,000)

Background

MTC engages contractors to assist with the implementation of customer research, education and outreach initiatives to benefit current and potential Clipper customers.

A primary goal of MTC's customer education and marketing program is to support transit operator fare policy and service changes that create demand for Clipper cards and information. During the current fiscal year, we launched our regional "Clipper Works for You" campaign in partnership with Caltrain, County Connection, Golden Gate Transit, SamTrans and VTA. We plan to continue this campaign to promote the savings that are available to customers who pay with Clipper on AC Transit, Muni and Union City Transit. As always, we will use this initiative and others to deliver on MTC's mandate to provide Clipper information and outreach to Title VI and Environmental Justice-protected populations.

In addition to continuing to provide support for the design of the next-generation Clipper system, the FY 2019-20 work plan also includes the biennial Clipper customer satisfaction survey.

Attachment A provides an overview of the draft Clipper customer education work plan for FY 2019-20 along with a summary of projects completed during the prior two fiscal years.

Contract Actions

Staff recommends that the Executive Board approve the following contract actions. These contract amendments were contemplated and are included in the Two Year Clipper Budget and Work Plan approved by the Clipper Executive Board on March 18, 2019. Both of the consultants are part of the pre-qualified Electronic Payment Systems (EPS) Implementation and Operations consultant bench competitively selected by MTC in May 2016. The original 3-year term of the EPS bench was extended by MTC through June 2021 as permitted by the original request for qualifications.

i. Contract Amendment – Customer Information Services: MIG, Inc. (MIG) (\$770,000)


Under this contract amendment, MIG would implement campaigns to increase Clipper adoption, coordinate the biennial customer satisfaction survey, and assist with the implementation of a new website, including accessibility design and review. MIG would continue to prepare updates to online and print materials in support of ongoing operational changes, such as fare policy changes and Clipper system improvements. The current contract amount is \$2,125,000; the proposed amendment would add \$770,000 and extend the contract through June 30, 2020.

iv. Contract Amendment – Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (RDA) (\$270,000)

Under this contract amendment, RDA would provide operational monitoring and reporting services, including reporting on the outcomes of outreach activities and tracking Clipper card distribution. RDA also would help establish baseline relationships with social service agencies for the purpose of monitoring administrative feasibility of the Regional Means-Based Transit Fare Pilot. The current contract amount is \$680,000; the proposed amendment would add \$270,000. This contract will expire on June 30, 2020.

Recommendation

Staff recommends that the Executive Board approve contract amendments with MIG (\$770,000) and RDA (\$270,000). 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

Attachments:

- Attachment A: Clipper® Customer Education Program Activities (FY 2017-18 through FY 2019-20)

Attachment A
Clipper® Customer Education Program Activities (FY 2017-18 through FY 2019-20)

Fiscal Year 2019-20 (Draft)			
Activity	Primary Audience	Secondary Audience	Tactics
“Clipper Works for You” campaign	<ul style="list-style-type: none"> • SFMTA • AC Transit • Marin Transit • Union City Transit • TBD 		<ul style="list-style-type: none"> • Advertising: digital and out-of-home media (i.e., transit shelters) • Car cards and onboard signage • Outreach events • Social media announcements • Website announcements
Expansion and enhancement projects	<ul style="list-style-type: none"> • AC Transit • BART • SFMTA 		<ul style="list-style-type: none"> • Outreach and support for operator projects, including: <ul style="list-style-type: none"> ○ AC Transit Bus Rapid Transit ○ BART to San Jose station openings ○ Muni Central Subway station openings
Caltrain ticket vending machine integration	<ul style="list-style-type: none"> • Caltrain 	<ul style="list-style-type: none"> • SamTrans 	<ul style="list-style-type: none"> • Content and programming updates to clippercard.com • Social media announcements • Website announcements • Emails to targeted registered customers • Customer service training
Implementation of more frequent action lists	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Website updates • Social media announcements • Customer service training
Biannual customer research	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Surveys of Clipper and non-Clipper customers • Focus groups or other small-group research as needed
Next-generation Clipper customer research	<ul style="list-style-type: none"> • Current and potential Clipper customers 	<ul style="list-style-type: none"> • Stakeholders 	<ul style="list-style-type: none"> • Content and programming updates to futureofclipper.com • Focus groups and surveys
Website improvements	<ul style="list-style-type: none"> • Current and potential Clipper customers 		<ul style="list-style-type: none"> • Coordinate with contractors to test and deploy an accessible, responsive site that is optimized for different devices
Electronic newsletter	<ul style="list-style-type: none"> • Clipper opt-in customers 	<ul style="list-style-type: none"> • Participating operators 	<ul style="list-style-type: none"> • Work with Cubic to develop an electronic newsletter for opt-in customers
Miscellaneous regional events	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • BART National Night Out outreach events • Content and programming updates to clippercard.com
Miscellaneous fare policy and service changes	<ul style="list-style-type: none"> • AC Transit • Golden Gate • SFMTA • SamTrans • TBD 		<ul style="list-style-type: none"> • Content and programming updates to clippercard.com • Social media announcements • Website announcements • Emails to targeted registered customers • Customer service training

Fiscal Year 2018-19			
Activity	Primary Audience	Secondary Audience	Tactics
“Clipper Works for You” campaign	<ul style="list-style-type: none"> • Caltrain • County Connection • Golden Gate Transit • SamTrans • VTA 		<ul style="list-style-type: none"> • Advertising: digital and out-of-home media (i.e., transit shelters) • Car cards and onboard signage • Outreach events • Coordination with operators on website content and messaging • Social media announcements • Website announcements
Clipper card vending at VTA light-rail stations	<ul style="list-style-type: none"> • VTA 	<ul style="list-style-type: none"> • Caltrain • SamTrans 	<ul style="list-style-type: none"> • Brochure updates • Social media announcements • Content and programming updates to clippercard.com • Customer service training
Miscellaneous regional events, including service expansions	<ul style="list-style-type: none"> • AC Transit • BART • VTA • WETA • Regional 		<ul style="list-style-type: none"> • BART National Night Out outreach events • WETA’s launch of Richmond service • Social media announcements • Content and programming updates to clippercard.com • Customer service training
Miscellaneous fare policy changes and operations support	<ul style="list-style-type: none"> • AC Transit • Caltrain • FAST • Golden Gate Transit • SFMTA • SolTrans 		<ul style="list-style-type: none"> • Brochure changes • Content and programming updates to clippercard.com • Social media announcements • Website announcements • Emails to targeted registered customers • Customer service training
C2 public engagement	<ul style="list-style-type: none"> • Regional 	<ul style="list-style-type: none"> • Stakeholders 	<ul style="list-style-type: none"> • Ongoing collection of feedback via email, social media and phone • Content and programming updates to futureofclipper.com • Focus groups and research, as needed
Regional communications plan	<ul style="list-style-type: none"> • Participating operators 		<ul style="list-style-type: none"> • Develop criteria for distributing operator-specific news and announcements through Clipper email and online channels
Communications material archive	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Development of online archive for creative files and messaging for transit operator use
Brochure streamlining	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Review print materials and identify opportunities to streamline content and better communicate ideas (i.e., infographics)
Website improvements	<ul style="list-style-type: none"> • Current and potential Clipper customers 		<ul style="list-style-type: none"> • Coordinate with contractors on design of a new accessible, responsive site that is easier to navigate and features an improved account management interface
Social media management	<ul style="list-style-type: none"> • Current and potential Clipper customers 		<ul style="list-style-type: none"> • Compose new posts and share program partner posts • Respond to inquiries and address customer service escalations, as needed

Fiscal Year 2017-18			
Activity	Primary Audience	Secondary Audience	Tactics
SMART launch	<ul style="list-style-type: none"> • SMART 	<ul style="list-style-type: none"> • Golden Gate Transit/Ferry • Marin Transit • Petaluma Transit • Santa Rosa CityBus • Sonoma County Transit 	<ul style="list-style-type: none"> • Outreach events (42) • Operator microsite • Social media announcements • Website announcements • Content and programming updates to clippercard.com • Instructional videos • Advertising • Customer service training
BART fare policy changes <ul style="list-style-type: none"> • Fare increase • Paper ticket surcharge • Change in youth age and discount 	<ul style="list-style-type: none"> • BART 		<ul style="list-style-type: none"> • Outreach events • Engage community-based organizations to participate in free card distribution program • Brochure updates • Social media announcements • Website announcements • Content and programming updates to clippercard.com
Downtown Berkeley BART station Clipper-only gates	<ul style="list-style-type: none"> • BART 	<ul style="list-style-type: none"> • AC Transit 	<ul style="list-style-type: none"> • Design informational signage • Review of BART signage and communications • Social media announcements
Clipper card vending machines at BART stations	<ul style="list-style-type: none"> • BART 	<ul style="list-style-type: none"> • AC Transit • County Connection • Tri Delta Transit • Union City Transit • WestCAT • Wheels 	<ul style="list-style-type: none"> • Brochure updates • Social media announcements • Content and programming updates to clippercard.com • Customer service training
Discontinuation of Park with Clipper pilot program	<ul style="list-style-type: none"> • Park with Clipper customers 		<ul style="list-style-type: none"> • Website announcements • Content and programming updates to clippercard.com • Development of notice for parking garage operators to post • Coordinate signage removal • Emails to targeted registered customers • Customer service training
C2 public engagement	<ul style="list-style-type: none"> • Current and potential Clipper customers 	<ul style="list-style-type: none"> • Stakeholders, including community-based organizations, accessibility organizations, employers, transit agency advisory groups 	<ul style="list-style-type: none"> • Content and programming updates to futureofclipper.com • Stakeholder interviews and presentations • Final report • Presentations on results

Fiscal Year 2017-18			
Activity	Primary Audience	Secondary Audience	Tactics
Cash-customer survey	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Intercept survey and report
Biennial customer satisfaction survey	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Intercept survey and report
Miscellaneous regional events	<ul style="list-style-type: none"> • BART • Regional 		<ul style="list-style-type: none"> • BART National Night Out outreach events • Outreach support for BART to Antioch station openings • Content and programming updates to clippercard.com • License agreements updates • Signage for Clipper vending machines planned for Salesforce Transit Center
Miscellaneous fare policy changes and operations support	<ul style="list-style-type: none"> • Caltrain • VTA 		<ul style="list-style-type: none"> • Brochure changes • Content and programming updates to clippercard.com • Social media announcements • Website announcements • Emails to targeted registered customers • Customer service training
Communications material archive	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Development of online archive for creative files and messaging for transit operator use
Brand Style Guide Update	<ul style="list-style-type: none"> • Program partners 	<ul style="list-style-type: none"> • Private industry 	<ul style="list-style-type: none"> • Update guidelines to reflect current standards • Develop brand compliance review form • Update clippercard.com content and post file
Website improvements	<ul style="list-style-type: none"> • Current and potential Clipper customers 		<ul style="list-style-type: none"> • Promote opportunity to opt-in for program communications • Accessibility improvements to online forms and account management pages • Developing plans for streamlined content and navigation
Social media management	<ul style="list-style-type: none"> • Current and potential Clipper customers 		<ul style="list-style-type: none"> • Compose new posts and share program partner posts • Respond to inquiries and address customer service escalations, as needed

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
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:	\$770,000 (this amendment) Total Contract value including amendments before this amendment = \$2,125,000 Total contract amount with this amendment = \$2,895,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2019-20 MTC agency budget
Motion:	That a contract amendment with MIG, Inc., for the purposes described herein and in the Executive Director's memorandum dated April 8, 2019, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2019-20 MTC agency budget.

Executive Board:

Denis Mulligan, Chair

Approved:

Date: April 15, 2019

REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

Summary of Proposed Contract Amendment

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, Regional Means-Based Transit Fare Pilot, and effectiveness of outreach activities, among other program areas
Project Cost Not to Exceed:	\$270,000 (this amendment) Total Contract value including amendments before this amendment = \$680,000 Total contract amount with this amendment = \$950,000
Funding Source:	TCP, STP, CMAQ, STA, Regional Measure 2 Operating
Fiscal Impact:	Funds dependent on the approval of the FY 2019-20 MTC agency budget
Motion by Board:	That a contract amendment with Resource Development Associates, Inc., for the purposes described herein and in the Executive Director's memorandum dated April 8, 2019, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2019-20 MTC agency budget.
Executive Board:	<hr/> Denis Mulligan, Chair
Approved:	Date: April 15, 2019