

# Metropolitan Transportation Commission Operations Committee

June 14, 2019

Agenda Item 4d

## Contract Amendment – Customer Research, Education and Outreach for the Clipper® Program: MIG, Inc. (\$770,000)

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

**Background:** 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.

Under the proposed contract amendment, MIG, Inc. (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.

MIG is 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.

Attachment A includes a summary of MIG and its project team’s small business and disadvantaged business enterprise status.

This contract action was approved by the Clipper Executive Board on April 15, 2019.

**Issues:** None identified.

**Recommendation:** Staff recommends that the Operations Committee authorize the Executive Director or designee to negotiate and enter into a contract amendment with MIG to extend the term of the contract to June 30, 2020 and to add \$770,000 to support the Clipper program’s customer research, education and outreach initiatives.

**Attachments:** Attachment A: Contractor DBE and SBE Status  
Attachment B: Clipper Customer Education Program Activities (FY 2017-18 through FY 2019-20)

  
Therese W. McMillan

	Firm Name	Role on Project	DBE* Firm			SBE** Firm		
			Yes	If Yes, List #	No	Yes	If Yes, List #	No
Prime Contractor	MIG, Inc.	Implement customer research and education activities			x			x
Subcontractor	Zeba Media	Advertising purchasing	x	44627				x
Subcontractor	EMC	Research			x			x

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

**Clipper Customer Education Program Activities (FY 2018-19 through FY 2019-20)**

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

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

## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Contract Amendment

Work Item No.:	320-1221
Consultant:	MIG, Inc. Berkeley, CA
Work Project Title:	Public Awareness and Customer Education Services
Purpose of Project:	Provide assistance with Clipper research, communications and customer education efforts
Brief Scope of Work:	Provide customer education information through printed materials, online content, and paid media
Project Cost Not to Exceed:	\$770,000 (this amendment) Total Contract before this amendment: \$2,125,000 Total Authorized Contract after this amendment: \$2,895,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funding is subject to the approval of the FY 2019-20 MTC budget
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with MIG, Inc. for the Clipper customer education services described above and in the Operations Committee Summary Sheet dated June 14, 2019, and the Chief Financial Officer is authorized to set aside \$770,000 for such amendment, subject to approval of the FY 2019-20 MTC budget.
Operations Committee:	<hr/> Dave Cortese, Chair
Approved:	June 14, 2019