

## Metropolitan Transportation Commission Operations Committee

May 8, 2020

Agenda Item 4d

### **Clipper® Contract Amendments – Customer Research, Education and Outreach: MIG, Inc. (\$1,335,000), Caribou Public Relations, Inc. (\$150,000) and Resource Development Associates, Inc. (\$150,000)**

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**Subject:** Request for approval of contract actions for Clipper customer research, education and outreach: contract amendments for MIG, Inc. (\$1,335,000), Caribou Public Relations, Inc. (\$150,000) and Resource Development Associates, Inc. (\$150,000).

**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.

MTC plans to continue into FY 2020-21 a campaign to dispel myths about Clipper, including delivering on MTC's mandate to provide Clipper information to Title VI and Environmental Justice-protected populations. The FY 2020-21 work plan includes completion of a redesigned website, signage and promotion of new transit services. Also in FY 2020-21, we will be launching the Clipper mobile app; the below requested contract amendment with MIG, Inc. includes creative development for that mobile app.

These contract amendments were contemplated and are included in the Two Year Clipper Budget and Work Plan. All of the 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) (\$1,335,000)**

Under this contract amendment, MIG would implement campaigns to increase Clipper adoption 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. MIG also would manage Clipper's social media program. Staff proposes that MIG also provide creative development for the launch of the Clipper mobile app. Clipper needs to increase awareness of the app upon launch, and significant customer education will be required to familiarize customers with how the app works. The current contract amount is \$3,495,000; the proposed amendment would add \$1,335,000. This contract will expire on June 30, 2021. MIG's and its contractors' disadvantaged business enterprise (DBE) and small business enterprise (SBE) status is shown in Attachment A.

ii. **Contract Amendment – Customer Outreach Services: Caribou Public Relations, Inc. (Caribou) (\$150,000)**

Under this contract amendment, Caribou would provide outreach services for Clipper. Staff anticipates using Caribou's services to support customer education campaigns as well as help publicize new transit services such as BART to San Jose, SFMTA's Central Subway and AC Transit's Bus Rapid Transit. The current contract amount is \$325,000; the proposed amendment would add \$150,000 and extend the period of performance through June 30, 2021. Caribou is a DBE and has no subcontractors for this project.

iii. **Contract Amendment – Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (RDA) (\$150,000)**

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 manage 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 \$780,000; the proposed amendment would add \$150,000 and extend the period of performance through June 30, 2021. Neither RDA nor its subcontractor, Diana Sanders, are DBEs or SBEs.

These efforts are required for Clipper to meet Title VI requirements and are essential to the ongoing successful performance of the Clipper program, and critical to the program's and transit agencies' recovery from the service interruptions and fears caused by COVID-19. These contracts were approved in FY 2019-20. They are not dependent on subsequent work except to the extent that Clipper should comply with Title VI and provide successful performance.

**Issues:**

On April 13, 2020, the Clipper Executive Board (CEB) deferred action on these contract actions to its May meeting. While for Clipper contract actions the normal sequence is for CEB approval to precede Operations Committee consideration, in light of the extraordinary circumstances presented by the COVID-19 pandemic, staff recommends that this Committee approve these contract actions subject to subsequent approval by the CEB.

**Recommendation:**

Staff recommends approval of contract amendments with MIG in an amount not to exceed \$1,335,000, with Caribou in an amount not to exceed \$150,000, and with RDA in an amount not to exceed \$150,000; with each of these approvals subject to subsequent approval by the CEB.

**Attachments:**

Attachment A: Contractor DBE and SBE Status

  
Therese W. McMillan

**Attachment A**

		DBE* Firm			SBE** Firm		
	Firm Name	Role on Project	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			
Subcontractor	EMC	Research			X		X
Prime Contractor	Caribou Public Relations, Inc.	Provide customer outreach	X	41619			X
Prime Contractor	Resource Development Associates, Inc.	Provide operational monitoring and reporting services			X		X
Subcontractor	Diana Sanders	Provide support for operational monitoring and reporting services			X		X

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

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

## REQUEST FOR OPERATIONS COMMITTEE APPROVAL

### Summary of Proposed Contract Amendment

Work Item No.:	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 print, online and paid media, i.e., advertisements.
Project Cost Not to Exceed:	<p>\$1,335,000 (this amendment)</p> <p>Total Contract value including amendments before this amendment = \$3,495,000</p> <p>Total contract amount with this amendment = \$4,830,000</p>
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP, Senate Bill 1 State of Good Repair
Fiscal Impact:	Funds dependent on the approval of the FY 2020-21 MTC agency 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 purposes described herein and in the Operations Committee Summary Sheet dated May 8, 2020 and the Chief Financial Officer is authorized to set aside \$1,135,000 for such amendment, subject to subsequent approval of this contract amendment by the Clipper Executive Board and further subject to approval of the FY 2020-21 MTC budget.
Operations Committee:	<hr/> <p>Dave Cortese, Chair</p>
Approved:	Date: May 8, 2020

# REQUEST FOR OPERATIONS COMMITTEE APPROVAL

## Summary of Proposed Contract Amendment

Work Item No.:	1221
Contractor:	Caribou Public Relations, Inc. Martinez, CA
Work Project Title:	Clipper Outreach Services
Purpose of Amendment:	Provide Clipper outreach services
Brief Scope of Work:	Provide in-person outreach services to distribute cards and provide public education in stations, at terminals and at bus stops.
Project Cost Not to Exceed:	\$150,000 (this amendment)  Total Contract value including amendments before this amendment = \$325,000  Total contract amount with this amendment = \$475,000
Funding Source:	TCP, STP, CMAQ, STA, Regional Measure 2 Marketing Operating
Fiscal Impact:	Funds dependent on the approval of the FY 2020-2021 MTC agency budget
Motion by Board:	That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with Caribou Public Relations, Inc., for the purposes described herein and in the Operations Committee Summary Sheet dated May 8, 2020 and the Chief Financial Officer is authorized to set aside \$150,000 for such amendment, subject to subsequent approval of this contract amendment by the Clipper Executive Board and further subject to approval of the FY 2020-21 MTC budget.
Operations Committee:	<hr/> Dave Cortese, Chair
Approved:	Date: May 8, 2020

## REQUEST FOR OPERATIONS COMMITTEE APPROVAL

### Summary of Proposed Contract Amendment

Work Item No.:	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/reporting on discounted Clipper card distribution, customer service issues, Regional Means-Based Transit Fare Pilot, effectiveness of outreach activities, and other program areas.
Project Cost Not to Exceed:	<p>\$150,000 (this amendment)</p> <p>Total Contract value including amendments before this amendment = \$780,000</p> <p>Total contract amount with this amendment = \$930,000</p>
Funding Source:	TCP, STP, CMAQ, STA, Regional Measure 2 Marketing and Operating
Fiscal Impact:	Funds dependent on the approval of the FY 2020-21 MTC agency budget
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with Resource Development Associates, Inc., for the purposes described herein and in the Operations Committee Summary Sheet dated May 8, 2020 and the Chief Financial Officer is authorized to set aside \$150,000 for such amendment, subject to subsequent approval of this contract amendment by the Clipper Executive Board and further subject to approval of the FY 2020-21 MTC budget.
Operations Committee:	<hr/> Dave Cortese, Chair
Approved:	Date: May 8, 2020