

Clipper[®] Executive Board

May 11, 2020

Agenda Item 3b

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

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 (\$150,000) and Resource Development Associates (\$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.

Attachment A is an overview of the customer education work plan for FY 2020-21 with a summary of projects of the prior three fiscal years.

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 will implement campaigns to increase Clipper adoption and assist with the implementation of a new website, including accessibility design and review. MIG will continue to prepare updates to online and print materials in support for ongoing operational changes. MIG also will manage Clipper's social media program. MIG also will 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 introduce 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.

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

Under this contract amendment, Caribou will provide outreach services for Clipper. We anticipate 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, extending the period of performance through June 30, 2021.

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

Under this contract amendment, RDA will 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, extending the period of performance through June 30, 2021.

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 deferred action on these contract actions to its May meeting. While for Clipper contract actions the normal sequence is for Executive Board approval to precede Operations Committee consideration, in light of the extraordinary circumstances presented by the COVID-19 pandemic, staff recommended that the Operations Committee approve these contract actions at its May 8, 2020 meeting subject to subsequent approval by the Clipper Executive Board.

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.

Attachments:

Attachment A: Clipper Customer Education Program Activities (FY 2017-18 through FY 2020-21)


Carol Kuester

Clipper Customer Education Program Activities (FY 2017-18 through FY 2020-21)

Fiscal Year 2020-21 (Draft)			
Activity	Primary Audience	Secondary Audience	Tactics
“Myth vs. Truth” campaign	<ul style="list-style-type: none"> Transit riders not using Clipper 		<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
Mobile App launch campaign	<ul style="list-style-type: none"> Current Clipper card users 	<ul style="list-style-type: none"> Transit riders not using Clipper 	<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: <ul style="list-style-type: none"> AC Transit Bus Rapid Transit BART to San Jose station openings Muni Central Subway station openings
General customer research as needed	<ul style="list-style-type: none"> Regional 		<ul style="list-style-type: none"> Surveys and focus groups as needed
Next-generation Clipper customer research	<ul style="list-style-type: none"> Regional 		<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"> Regional 		<ul style="list-style-type: none"> Manage testing and deployment of website redesign Improve account management interface
Miscellaneous regional events	<ul style="list-style-type: none"> BART 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"> Golden Gate SFMTA 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
Social media management	<ul style="list-style-type: none"> Regional 		<ul style="list-style-type: none"> Develop new social media strategy to accompany mobile app launch Compose posts and share partner posts Respond to inquiries and address customer service escalations, as needed

Fiscal Year 2019-20			
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: <ul style="list-style-type: none"> ○ AC Transit Bus Rapid Transit ○ BART to San Jose station openings ○ Muni Central Subway station openings
Implementation of more frequent actionlists	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Website updates • Social media announcements • Advertising (i.e., car cards)
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
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"> • Regional 		<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"> • Regional 		<ul style="list-style-type: none"> • Manage testing and deployment of website redesign • Improve account management interface
Electronic newsletter	<ul style="list-style-type: none"> • Clipper opt-in customers 	<ul style="list-style-type: none"> • Participating transit operators 	<ul style="list-style-type: none"> • Work with Cubic to develop an electronic newsletter for opt-in customers (switched strategies to redirect to transit operator lists)
Miscellaneous regional events	<ul style="list-style-type: none"> • BART • 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"> • Golden Gate • SFMTA • 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
Social media management	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Compose posts and share partner posts • Respond to inquiries and address customer service escalations, as needed

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 • Coordinate with operators on website content and messaging • 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 • Brochure updates • 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 • Muni • 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 transit operators 		<ul style="list-style-type: none"> • Develop criteria for distributing operator-specific announcements through Clipper email and online channels
Communications material archive	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Develop 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"> • Identify opportunities to streamline print material content and better communicate ideas (i.e., infographics)
Website improvements	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Coordination with Cubic for implementation of new site that is optimized for different devices • Improve account management interface
Social media management	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Compose posts and share partner posts • Respond to inquiries and address customer service escalations, as needed

Fiscal Year 2017-18			
Activity	Primary Audience	Secondary Audience	Tactics
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"> • Regional 	<ul style="list-style-type: none"> • Stakeholders, including community-based and 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
Cash-customer survey	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Intercept survey and report
Biannual customer research	<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 Transbay 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"> • Regional 		<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 • Coordination with Cubic for development of responsive site that is optimized for different devices
Social media management	<ul style="list-style-type: none"> • Regional 		<ul style="list-style-type: none"> • Compose posts and share 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 print, online and paid media, i.e., advertisements
Project Cost Not to Exceed:	\$1,335,000 (this amendment) Total Contract value including amendments before this amendment = \$3,495,000 Total contract amount with this amendment = \$4,830,000
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:	That a contract amendment with MIG, Inc., for the purposes described herein and in the Executive Director's memorandum dated May 11, 2020, is hereby approved by the Clipper Executive Board, subject to adoption of the FY 2020-21 MTC agency budget.
Executive Board:	<hr/> Rick Ramacier, Chair
Approved:	Date: May 11, 2020

REQUEST FOR CLIPPER EXECUTIVE BOARD APPROVAL

Summary of Proposed Contract Amendment

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 a contract amendment with Resource Development Associates, Inc., for the purposes described herein and in the Executive Director's memorandum dated May 11, 2020, is hereby approved by the Clipper Executive Board, subject to adoption of the FY 2020-21 MTC agency budget.

Executive Board: _____
Rick Ramacier, Chair

Approved: Date: May 11, 2020

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:	\$150,000 (this amendment) Total Contract value including amendments before this amendment = \$780,000 Total contract amount with this amendment = \$930,000
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 Board:	That a contract amendment with Resource Development Associates, Inc., for the purposes described herein and in the Executive Director's memorandum dated May 11, 2020, is hereby approved by the Clipper Executive Board, subject to adoption of the FY 2020-21 MTC agency budget.
Executive Board:	<hr/> Rick Ramacier, Chair
Approved:	Date: May 11, 2020