

Clipper® Executive Board

April 24, 2023

Agenda Item 3a

Contract Amendment for Moore Iacofano Goltsman Inc. (\$2,700,000)

Subject:

An amendment to add funds to Moore Iacofano Goltsman Inc.'s contract for the purpose of customer education and marketing for the Next Generation Clipper System and Clipper START.

Background:

MTC annually contracts with a customer education firm to produce materials, manage the Clipper website, produce signage, manage Clipper social media, conduct ambassador outreach, conduct customer research, develop and implement customer education and marketing plans, and conduct Clipper START marketing, among other tasks. The current contract for this work is expiring June 30, 2023.

For the coming fiscal, in addition to regular ongoing tasks, we anticipate the following specific tasks for the customer education contractor:

- Development and implementation of new web content, emails, social media and advertising to educate current customers about the changes in Clipper with the Next Generation System
- Development and distribution of training materials for the operator marketing and customer service staff to remind them of changes in Clipper (this can be extended to other staff as well)
- Development and distribution of customer education materials transit operators can use to educate their customers
- Presentations to advisory committees and other groups as needed
- Continued marketing of Clipper mobile payment including ambassador outreach as needed
- Biennial Clipper customer and non-customer research, including surveys, focus groups, individual interviews and other qualitative methods

In addition, the contractor will be conducting all marketing for the Clipper START program, including developing creative, purchasing media and placing ads through a variety of methods.

This work will also include an equity review to ensure that all marketing materials and tactics are consistent with MTC's equity platform.

In 2022, MTC selected Moore Iacofano Goltsman Inc. through a mini procurement process for a new contractor after issuing a Request for Proposals to nine firms who had qualified for MTC's 2020 Electronic Payments Consultant Assistance Bench. Their contract was approved by the Clipper Executive Board and MTC's Operations Committee.

Issues:

None identified.

Recommendation:

Staff recommends that the Board approve a contract amendment with Moore Iacofano Goltsman Inc. in an amount not to exceed \$2,700,000 and to extend the contract period to June 30, 2024, to provide customer education and marketing for Clipper, particularly the Next Generation Clipper System, and the Clipper START program as described above.

Attachments:

None.



Carol Kuester

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor: Moore Iacofano Goltsman Inc.
Berkeley, CA

Work Project Title: Clipper Customer Education and Marketing

Purpose of Project: To provide customer education and marketing for Clipper and associated programs

Brief Scope of Work: Provide advertising, material development, social media management, research, presentations, training, ambassador outreach and other tasks for the Next Generation Clipper System and Clipper START as needed

Project Cost Not to Exceed: \$2,700,000

Funding Source: SB1 State of Good Repair, Clipper Card Fee Account, Clipper Float Account, Clipper Inactive Card Funds, Regional Measure 2 Marketing, Regional Measure 2 Operating, State Transit Assistance, Low Carbon Transit Operations Program

Fiscal Impact: Funds for FY 2023/24 subject to agency budget approval

Motion by Board: That a contract amendment with Moore Iacofano Goltsman Inc. for the purposes described above and in the Clipper Executive Director's summary sheet dated April 24, 2023, is hereby approved by the Clipper Executive Board.

Clipper Executive Board:

Robert Powers, Chair

Approved: April 24, 2023