

Clipper® Executive Board

May 20, 2024

Agenda Item 3c

Clipper® Customer Education and Outreach Contract Actions: i. Contract Amendment – Moore Iacofano Goltsman, Inc. (MIG) (\$3,600,000); ii. Contract Amendment – Caribou Public Relations, Inc. (Caribou) (\$400,000)

Subject:

Request for approval of the listed consultant contract actions to add \$3,600,000 to the MIG contract to provide customer education support to the Next-Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

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 and conduct customer research. MIG also plans, develops and implements customer education and marketing for both Clipper in general and the Clipper START program, among other tasks. The current contract for this work is expiring June 30, 2024.

For the coming fiscal year, 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, presentation of information about the next-generation Clipper system, and conducting surveys, focus groups and other research.

In addition, the contractor will be conducting all advertising for the Clipper START program, including developing creative, purchasing media and placing ads through a variety of methods. This work will be based on the recently completed equity and effectiveness review.

In 2022, MTC selected MIG, 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 Consultant Bench: 2020 Electronic Payments Consultant Assistance – Cycle 1. Their contract was approved by the Clipper Executive Board and MTC's Operations Committee.

Clipper also contracts with a firm to conduct community-based outreach in support of the Clipper® START means-based transit fare discount program. Since May 2023, the contractor serving in this capacity has been Caribou Public Relations, Inc. (Caribou). This contract is set to expire June 30, 2024, but may be extended for up to two years.

For fiscal year 2024-25, we anticipate the following specific tasks for the outreach contractor:

- Contact community-based organizations (CBOs) to schedule participation in existing events or schedule special Clipper START-specific events to educate participants about the program and how to apply.
- Post flyers and posters about Clipper START in public places such as grocery stores, laundromats and other locations in equity priority communities. At the same time, distribute brochures to libraries for distribution.
- Subcontract with up to 10 community-based organizations to have them conduct targeted outreach to their service populations. Clipper piloted this approach in FY 2022-23 with Roots Community Health Center, added nine CBOs in FY 2023-24 and would like to expand this effort based on recommendations in the Clipper START evaluation report.

In April 2023, MTC selected Caribou through a direct select process approved by the MTC Executive Director. Caribou is on the Consultant Bench: 2020 Electronic Payments Consultant Assistance – Cycle 1.

Issues:

None identified.

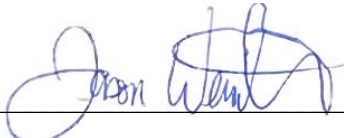
Recommendation:

Staff recommends that the Board approve a contract amendment with MIG, Inc. in an amount not to exceed \$3,600,000 to provide customer education and marketing for Clipper, particularly the Next-Generation Clipper System and the Clipper START program, and to approve a contract

amendment with Caribou Public Relations, Inc. in an amount not to exceed \$400,000 for the purpose of Clipper START outreach as described above.

Attachments:

None.



Jason Weinstein

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor: Moore Iacofano Goltsman, Inc. (MIG)
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 and other tasks for the Next Generation Clipper System and Clipper START as needed

Project Cost Not to Exceed: \$3,600,000 (this amendment)
Total contract amount including amendments before this amendment = \$4,900,000
Total contract amount with this amendment = \$8,500,000

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

Motion by Board: That a contract amendment with MIG for the purposes described above and in the Clipper Executive Director's summary sheet dated May 20, 2024, is hereby approved by the Clipper Executive Board.

Clipper Executive Board:

Robert Powers, Chair

Approved: May 20, 2024

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor (or “Consultant”): Caribou Public Relations, Inc.
Martinez, CA

Work Project Title: Clipper START Marketing

Purpose of Project: To increase participation in the Clipper START program

Brief Scope of Work: Provide outreach services for the Clipper START program as needed

Project Cost Not to Exceed: \$400,000 (this amendment)
Total contract amount including amendments before this amendment = \$520,000
Total contract amount with this amendment = \$920,000

Funding Source: Low Carbon Transit Operations Program

Fiscal Impact: None

Motion by Board: That a contract amendment with Caribou Public Relations, Inc. for the purposes described above and in the Clipper Executive Director’s summary sheet dated May 20, 2024, is hereby approved by the Clipper Executive Board.

Clipper Executive Board: _____
Robert Powers, Chair

Approved: May 20, 2024