



METROPOLITAN  
TRANSPORTATION  
COMMISSION

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## *Memorandum*

TO: Operations Committee

DATE: June 6, 2008

FR: Deputy Executive Director, Operations

RE: Contract Amendment – Marketing, Web, and Communications Services: Swirl, Inc.

Staff recommends that this Committee approve a contract amendment with Swirl, Inc. for marketing, web, and communication services for MTC, MTC SAFE, and BATA customer service programs in an amount not to exceed \$2,830,000 for work activities in FY 2008-09.

### Background

In July 2006, this Committee approved a contract with Swirl Inc. for marketing, web, and communication services for MTC, MTC SAFE and BATA customer service programs. Since then, this Committee has annually approved a work plan and budget for the regional operational program. A summary of key accomplishments from FY2007-08 is provided in Attachment A.

The upcoming fiscal year is the third year of a four-year contract term. The contract supports multiple projects but is structured so that each work activity is a separately negotiated task order. This task order approach allows staff to control spending, because it requires that the scope of each task be defined in detail and sets limits on the cost of each task.

### FY 2008-09 Contract Budget and Scope

Staff is requesting approval of \$2,830,000 for the following proposed work activities for FY2008-09:

- 511. (\$1,430,000) Swirl will continue to provide web design, web operations, and marketing services for the 511 phone service and 511.org. This funding request for 511 is larger than in past years because of the need to launch significant new features: the new transit web page, transit trip planner and transit departure times for MUNI and BART. In addition, we intend to partner with CSAA and CHP to promote awareness of new hands-free telephone laws. Swirl will support communications to promote the new MY 511<sup>SM</sup> feature and improved 511 phone voice recognition. Swirl will also produce permanent 511 signs for posting on changeable message signs to promote awareness of traffic conditions and driving time information on 511. These efforts are in addition to Swirl's usual marketing tasks, such as street banner permitting and maintenance and development of partnerships to promote 511.

Swirl will continue to provide on-going website design and will operate and maintain the 511.org home page. This on-going work includes management of promotional boxes on the 511.org home page, and coordination and usage tracking for the suite of 511.org web pages. Swirl will prepare recommendations for a) updating all 511 web pages to align

with the new transit web page format, and b) posting traffic and transit data feeds on the web to encourage development of new features by entrepreneurs. Swirl is also responsible for conducting user research, including an annual public poll to measure awareness of MTC customer service projects. Finally, Swirl will provide support for regional emergencies if required by crafting messages for the public and implementing and maintaining special web pages with detailed incident and transportation information.

- TransLink<sup>®</sup>. (\$550,000) Swirl will assist Phase 2.3 agencies as they move from the testing phases to the public launch of TransLink<sup>®</sup> on their systems. Swirl will also work with the TransLink<sup>®</sup> contractor to make improvements to the functionality of the TransLink<sup>®</sup> website and will develop educational site features as well as new “microsites” for the Phase 2.3 agencies, containing information specifically about using TransLink<sup>®</sup> on their individual systems. Swirl also will design the new TransLink<sup>®</sup> Employer Program website and will coordinate with the TransLink<sup>®</sup> contractor to integrate the design with the back end of the system. In addition, Swirl will provide on-site support for SFMTA to conduct internal planning and coordination in preparation for soft and hard launch.
- FasTrak<sup>®</sup>. (\$850,000) Swirl will provide marketing and public information services for various FasTrak<sup>®</sup> projects, including a Violation Enforcement public awareness campaign to influence driver behavior and reduce violations at the bridges, an educational campaign to inform bridge users about FasTrak<sup>®</sup>, developing and coordinating partnership promotions including marketing materials and incentives to encourage customer enrollment, FasTrak<sup>®</sup> website enhancements including videos and newsletters to better communicate with customers, customer satisfaction survey, and other marketing services, as needed. Swirl will be responsible for development of advertising campaigns, creating messages, developing print and electronic material, and purchasing radio and/or television buys.

### Recommendation

Staff recommends that the Committee authorize the Executive Director to negotiate and enter into a contract amendment with Swirl, Inc. for marketing, web, and communication services for MTC, MTC SAFE, and BATA customer service programs in an amount not to exceed \$2,830,000 for work activities in FY 2008-09.

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Ann Flemer

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## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Contract Amendment

Work Item No.: 1223

Consultant: Swirl Inc.  
San Francisco, California

Work Project Title: Marketing, Web, and Communication Services

Purpose of Project: Provide marketing, web, and communication services and support for MTC, MTC SAFE, and BATA's customer service programs.

Brief Scope of Work: Provide services in the areas of marketing, partnership building, design and production, market/product design research, web site design and maintenance, on-demand short-term incident response, user feedback, and public relations for MTC, MTC SAFE, and BATA's customer service programs. The current funding is for the 511, TransLink<sup>®</sup>, and FasTrak<sup>®</sup> programs.

Project Cost Not to Exceed: \$2,830,000 for work activities in FY 2008-09 (previous total contract amount = \$6,084,515)

Funding Source: CMAQ, STP, SAFE, STA, TDA, Toll Revenue

Fiscal Impact: Funds for the relevant customer service programs are subject to adoption of the FY 2008-09 MTC, MTC SAFE and BATA budgets.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Swirl Inc. for Marketing, Web, and Communication Services. Staff also requests that the Committee authorize the Chief Financial Officer to set aside \$2,360,000 in funds for such contract amendment.

Operations Committee: \_\_\_\_\_  
Sue Lempert, Chair

Approved: Date: June 13, 2008

**Attachment A**  
**Summary of Key Accomplishments from FY 2007-08**

In FY2007-08, Swirl provided various services, including the development of marketing campaigns, web design services, public outreach assistance, and development of a range of program materials. A summary of some key accomplishments from FY2007-08 is described below:

- TransLink®. Swirl provided the following services: 1) Marketing services through the development of a new set of cardholder marketing and distribution materials, including: a User Guide which is sent out with new TransLink® cards ordered online or over the phone; a Quick Start Guide given out with new cards distributed at ticket offices and retail locations; a new general marketing/sales brochure; and agency specific brochures; 2) Redesign of the TransLink® website with enhanced content, navigation and features including interactive maps and graphics 3) Development of how-to videos; and 4) Major marketing and communications support to agencies through the development of three agency-specific TransLink® Marketing Plans for BART, Caltrain and San Francisco Municipal Transportation Agency (SFMTA). These plans detail the strategies and tactics each agency plans to use to promote TransLink® to their customers leading up to and after the public launch of TransLink® on their systems. In addition, Swirl provided significant on-site marketing support to SFMTA staff. Swirl is also finalizing work on a strategic regional marketing and advertising campaign for TransLink®, which includes production of two television advertisements. The total cost was \$1,610,000.
  
- 511. Swirl provided the following for the 511 phone service and 511.org website: 1) A customized promotional box on 511.org and special series of web pages in advance of the Labor Day Bay Bridge closure with details about the closure and transportation alternatives during the weekend, 2) Development of special emergency services web tools, including a series of standard web pages for quick implementation in response to major incidents/emergencies, designed to be customized with incident specifics, detailed maps and instructions for travelers, 3) A content management system allowing Swirl and MTC 511 staff to update web pages with incident/emergency information from work and home computers, 4) Public outreach services, including a web and phone-based 511 usage and satisfaction survey, and a region-wide 511 awareness survey, which provides operational direction and a foundation for launch and marketing initiatives, 4) New street banners, maintenance of existing street banner permits and locations, and production and installation of the Yerba Buena Island banner; 5) Ongoing maintenance of the 511.org website and usage tracking, and 6) Coordination of partnerships with sponsors of major events (e.g. KFOG Kaboom, Spare the Air) . The total cost was \$942,565.
  
- FasTrak®. Swirl provided the following for the FasTrak® Program: 1) Development and execution of a major Marketing campaign in support of the FasTrak® Strategic Plan improvements that were implemented during the summer, which resulted in an 85% increase in average monthly enrollments; 2) Development and execution of a Retail Toll Tag Holiday 2007 campaign, which resulted in an increase in retail toll tag sales of 43% and 16% at Costco and Safeway, respectively; and 3) Other marketing services, including the implementation of an online FasTrak® customer satisfaction survey, and the development of a partnership promotion, to be launched in May/June and expected to increase new FasTrak® enrollments during the summer. The total cost was \$500,000.