



**METROPOLITAN
TRANSPORTATION
COMMISSION**

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Memorandum

TO: Operations Committee

DATE: May 1, 2009

FR: Executive Director

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 \$2,347,000 for work activities in FY 2009-10.

Background

In July 2006, this Committee approved a four year contract with Swirl Inc. for marketing, web, and communication services for MTC, MTC SAFE and BATA customer service programs, subject to annual Committee approval of a work plan and budget. A summary of key accomplishments from FY 2008-09 is provided in Attachment A.

The upcoming fiscal year is the last of the four-year base contract term. However, we have the option to extend for up to six additional years. 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 2009-10 Contract Budget and Scope

Staff is requesting approval of \$2,347,000 for the following proposed activities for FY2009-10:

Program	FY 2009-10	Major Tasks	FY 2008-09	Difference
511	\$982,000	<ul style="list-style-type: none"> • Promotion of new 511 transit services (trip planner, MY 511) • Consumer research for Urban Partnership Program projects • Accessibility reviews • Website redesign implementation 	\$1,600,000	(\$618,000)
TransLink®	\$665,000	<ul style="list-style-type: none"> • Employer Program launch • Launch for BART, SF Muni, Caltrain 	\$1,300,000	(\$635,000)
FasTrak®	\$700,000	<ul style="list-style-type: none"> • Development of advertising campaigns and print and electronic material • Purchase of radio and television buys • Website review and development 	\$700,000	\$0
Total	\$2,347,000		\$3,600,000	(\$1,253,000)

The following provides more detail on the proposed work plans.

- 511. (\$982,000) Key initiatives for the year include a campaign to promote the new transit web page, transit trip planner, and MY 511 transit. The campaign will build on promotional efforts for real-time transit which will be launched in June. Swirl will also be responsible for conducting user research, including focus groups and usability studies for Urban Partnership Program-funded projects such as the multi-modal trip planner and parking information. Swirl will also conduct accessibility reviews for all new features and website components.

Swirl will continue to provide web design, web operations, and marketing services for the 511 phone service and 511.org, including supporting the launch and alignment of modal pages based on the redesigned 511.org home page (to be launched in June). Finally, Swirl will support special web pages with detailed incident and transportation information for the upcoming Bay Bridge Closure and regional emergencies if required.
- TransLink[®]. (\$665,000) Swirl will assist transit agencies as they move from the testing phases to the public launch of TransLink on their systems by supporting development of marketing strategies, customer materials, and advertising campaigns. Swirl will also work with the TransLink Contractor to make improvements to the functionality of the TransLink website. Swirl will design and help launch the new TransLink employer program website (called TransLink[®] Direct Benefits) and coordinate with the TransLink Contractor to integrate the website design with the back office system.
- FasTrak[®]. (\$700,000) Swirl will continue to provide marketing and public information services for the FasTrak[®] program. For FY 2009-10, the major marketing activities will focus on informing motorists and encouraging FasTrak[®] sign-ups in concert with the planned addition of FasTrak[®]-only lanes at the toll plazas of the state-owned bridges as proposed in the 2009 update of the FasTrak[®] Strategic Plan. The major marketing activities planned for FY 2009-10 will include developing and coordinating partnership promotions, including marketing materials and incentives to encourage customer enrollment; creating FasTrak website enhancements to better communicate with customers; implementing a customer satisfaction survey; and providing 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 \$2,347,000 for work activities in FY 2009-10.

Steve Heminger

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Attachment A
Summary of Key Accomplishments from FY 2008-09

In FY2008-09, 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 FY2008-09 is described below:

- 511. (\$1,600,000) 1) A redesigned 511.org home page and series of new informational content pages; 2) Marketing campaign for 511 traffic, which resulted in a 30%+ increase in 511 traffic call volume during the campaign; 3) Marketing campaign for real-time transit features (forthcoming in June); 4) Usability and accessibility studies for the new 511 transit website and trip planner; 5) Public outreach services, including a web and phone-based 511 usage and satisfaction survey, and a region-wide 511 awareness survey which showed that awareness of 511 increased from 48% in 2008 to 61% this year; 6) Brochure updates, maintenance of existing street banner permits and locations, and production of signs for Caltrans' changeable message signs; 7) Ongoing maintenance of the 511.org website and usage tracking, and; 8) Coordination of partnerships with AAA, CHP, and Plantronics.

- TransLink[®]. (\$1,300,000) 1) Oversight and implementation of activities related to the successful introduction of TransLink[®] on San Francisco Muni's fleet including customer outreach events, educational activities aimed at employees, completion of customer surveys and focus groups, and development of advertising and customer materials; 2) Major improvements to the TransLink[®] website including a redesigned home page, a thorough review and updating of the website's content, and plans for redesigning the process for ordering TransLink[®] cards and value; 3) Marketing support including customer outreach events, design of advertising and customer materials, and strategic planning to AC Transit and Golden Gate Transit and Ferry related to agency-specific initiatives such as Golden Gate Ferry's replacement of ticket books; 4) Planning support for the introduction of TransLink[®] in the BART system; and 5) Planning support for the introduction of TransLink[®] Direct Benefits, which is a new program set to launch in FY 2009/10 that will provide transit riders a new option for receiving and managing pre-tax transit benefits.

- FasTrak[®]. (\$700,000) 1) Creation and development of a major account acquisition campaign (including television buy, in-store retailer advertising, and Bay Area gas station advertising) to educate bridge users about FasTrak and increase enrollments, which is scheduled to begin in the last week of April and continue through the first week of June; 2) Completion of a partnership promotion, which resulted in over 600 new accounts during the summer; and 3) Other marketing services, including the implementation of an online FasTrak customer satisfaction survey, as well as the completion of an educational video to teach customers how to properly mount their toll tag.

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, emergency response, user feedback, and public relations for MTC, MTC SAFE, and BATA's customer service programs. The current funding is for the 511, TransLink[®], and FasTrak[®] programs.

Project Cost Not to Exceed: \$2,347,000 for work activities in FY 2009-10 (previous total contract amount = \$10,026,475)

Funding Source: CMAQ, STP, SAFE, TDA, Toll Revenue, RM-2

Fiscal Impact: Funds for the relevant customer service programs are subject to adoption of the FY 2009-10 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 \$2,347,000 in funds for such contract amendment.

Operations Committee: _____
Amy Rein Worth, Chair

Approved: Date: May 8, 2009