



METROPOLITAN  
TRANSPORTATION  
COMMISSION

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## *Memorandum*

TO: Operations Committee

DATE: May 6, 2011

FR: Deputy Executive Director, Operations

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

Staff recommends that the Committee approve a contract amendment with Swirl, Inc. for marketing, web, and communication services in an amount not to exceed \$250,000 for the first three months of FY 2011-12.

### **Background**

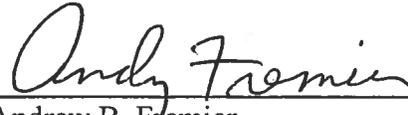
MTC's Marketing, Web, and Communication Services contract, with Swirl Inc. provides customer education, public outreach, market research, and web-related services for MTC's regional operations programs. These regional operations programs include 511 traveler information system, the Clipper<sup>SM</sup> regional fare payment system and the FasTrak<sup>®</sup> service.

This Committee originally approved the contract with Swirl in July 2006. The base contract term was four years (through June 2010) with options to extend the term for up to six additional years. In May 2010, this Committee approved staff's recommendation for a one-year contract extension with Swirl Inc. through June 2011, with the expectation that staff would be assessing the timing and approach for re-bidding the contract in FY 2010-11. Since then, the 511 program elected to secure assistance for future customer communications needs as part of its procurement for the Regional Ridesharing and Bicycle Program. For the FasTrak<sup>®</sup> and Clipper<sup>SM</sup> programs, staff have not completed the process of procuring new contracts for communications and customer education services, but plan to complete the procurements in the first quarter of FY 2011-12.

To ensure uninterrupted oversight and delivery of 511 and FasTrak<sup>®</sup>-related customer communications programs, staff recommends a three-month extension of the current contract. To ensure uninterrupted oversight and delivery of Clipper<sup>SM</sup>-related customer education services, staff recommends both a three-month extension of the current contract and an additional \$250,000 in funding. Under the recommended amendment, Swirl will provide oversight and delivery of customer education and communications services until MTC has completed its procurement of new contractors. The additional funding will include support for the continued transition of transit agency passes to Clipper<sup>SM</sup>-only availability, specifically BART's youth, senior and disabled tickets and SamTrans passes; expanding participation in pre-tax transit benefit programs; other policy changes impacting customer's use of the Clipper<sup>SM</sup> system; and continued customer education targeting transit riders who have not yet switched to Clipper<sup>SM</sup>.

**Recommendation**

Staff recommends that this Committee authorize the Executive Director to negotiate and enter into a contract amendment with Swirl, Inc. for marketing, web, and communication services for MTC regional operations programs in an amount not to exceed \$250,000 for work activities in the first three months of FY 2011-12.



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Andrew B. Fremier

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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 regional operations 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 regional operations programs. Projects supported by this contract include 511, Clipper<sup>SM</sup>, and FasTrak<sup>®</sup>.

Project Cost Not to Exceed: \$250,000 for work activities in FY 2011-12 (this amendment)

Total contract amount to date = \$ 16,398,475

Funding Source: CMAQ, STP, SAFE, TDA, Toll Revenue, RM-2, STA, PTMISEA, UPP.

Fiscal Impact: Funds for the relevant customer service programs are subject to adoption of the FY 2011-12 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, and the Chief Financial Officer is directed to set aside not to exceed \$250,000 in funds for such contract amendment, subject to approval of the FY 2011-12 agency budget.

Operations Committee: \_\_\_\_\_  
Jake Mackenzie, Chair

Approved: Date: May 13, 2011