



METROPOLITAN
TRANSPORTATION
COMMISSION

Agenda Item 4c
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Memorandum

TO: Operations Committee

DATE: May 1, 2015

FR: Executive Director

W.I. 310-2700, 320-1221

RE: Contract Actions – Clipper® Customer Communications and In-Person Customer Services

- i. Contract Amendment – Public Awareness and Customer Education Services: MIG, Inc. (\$550,000)
- ii. Contract Amendment – Distribution and Communications Planning and Support Services: Synapse Strategies (\$200,000)
- iii. Contract Amendment – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$125,000)
- iv. Funding Agreement Amendment – Customer Service Center at AC Transit Headquarters: AC Transit (\$250,000)
- v. Contract – Customer Service Center/Transportation Kiosk at Embarcadero Bay Area Rapid Transit (BART) Station Operations: Nematode Holdings, LLC (\$525,000)
- vi. Contract Amendment – Customer Service Center/Bay Crossings at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$215,000)

Items in this memorandum reflect contracts to continue support for communication initiatives that directly affect Clipper® customers and the provision of in-person Clipper® customer services. The three in-person customer service centers offer program information to the public. In addition, on a monthly basis the three centers combined issue an average of 3,500 new and replacement cards and sell over \$700,000 of transit value. Staff envisions a need for walk-in customer service for at least as long as Clipper is a card-based system. Staff is evaluating the roles that transit agency ticket offices and MTC's new headquarters at 375 Beale Street can play in the overall strategy for in-person Clipper customer service.

Contract Actions

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into the following contract actions:

- i. **Contract Amendment – Public Awareness and Customer Education Services: MIG, Inc. (\$550,000)**

In January 2012, the Operations Committee approved a contract with MIG, Inc. (MIG) to provide customer education services for Clipper®. Per the terms of the 2011 procurement, the initial period of performance was three years, ending no later than June 30, 2014, with

the option to renew for up to two additional one-year periods. MIG is neither a small business nor a disadvantaged business enterprise (DBE).

The scope of work for this amendment includes the development and implementation of customer education initiatives related to the launch of Clipper® on new transit services and public input planning for the next generation of Clipper. Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with MIG to extend the period of performance through June 30, 2016, at a cost not to exceed \$550,000, subject to Commission approval of the FY 2015-16 agency budget.

ii. Contract Amendment – Distribution and Communications Planning and Support Services: Synapse Strategies (\$200,000)

This Committee approved Synapse Strategies (Synapse) as part of the Clipper® Electronic Payment Implementation and Operations bench in May 2013, and MTC executed a contract with Synapse in July 2014 for \$200,000 pursuant to approval of this committee in May 2014. Tasks under this contract include management and administration of customer education initiatives and assistance with operational reporting. Synapse is a DBE.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Synapse to extend the period of performance through June 30, 2016, at a cost not to exceed \$200,000, subject to Commission approval of the FY 2015-16 agency budget.

iii. Contract Amendment – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$125,000)

This Committee approved Caribou Public Relations (Caribou) as part of the On-Call Consultant Assistance for the Operational Programs Customer Information Services bench in July 2014. MTC subsequently executed a contract which expires June 30, 2015. Under the proposed amendment, MTC will add \$125,000 to the contract and extend its term for an additional year in order for Caribou to continue its work providing general Clipper® education and communicating the benefits of Clipper® to Bay Area transit riders, including Title VI protected customers. Caribou is a DBE.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Caribou to extend the period of performance through June 30, 2016, at a cost not to exceed \$125,000, subject to Commission approval of the FY 2015-16 budget.

iv. Funding Agreement Amendment – Customer Service Center at AC Transit Headquarters: AC Transit (\$250,000)

In April 2012, MTC executed a funding agreement with AC Transit for the operation of a Clipper® customer service center at AC Transit's headquarters in Oakland. AC Transit's multilingual customer service staff issues new and replacement cards, distributes Clipper® information, and answers questions about the use of Clipper® on all participating transit services.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a funding agreement amendment with AC Transit to extend the period of performance through June 30, 2016, at a cost not to exceed \$250,000, subject to Commission approval of the FY 2015-16 agency budget.

v. **Contract – Customer Service Center/Transportation Kiosk at Embarcadero Bay Area Rapid Transit (BART) Station Operations: Nematode Holdings, LLC (\$525,000)**

In October 2009, the Bay Area Toll Authority (BATA) executed a competitively-procured agreement with Nematode Holdings, LLC (“Nematode”) for operation of a transportation support kiosk in the Embarcadero BART station. BATA assigned this assignment to MTC in 2011. The final option to extend that agreement expires June 30, 2015. Staff is recommending a one-year sole source contract, which will provide staff time to prepare a competitive procurement for the years beyond, for Nematode to continue providing Clipper® in-person customer service at this location based on Nematode having secured a multi-year permit from BART to operate this highly visible kiosk space. Nematode is neither a small business nor a DBE.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract with Nematode through June 30, 2016, at a cost not to exceed \$525,000, subject to Commission approval of the FY 2015-16 agency budget.

vi. **Contract Amendment – Customer Service Center/Bay Crossings at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$215,000)**

In January 2011, the Bay Crossings store operated by Nematode began offering expanded Clipper® customer services under a sole source contract with MTC, based on the unique position of this store as the only vendor in the San Francisco Ferry Building selling transit tickets. Under this agreement, Nematode is also responsible for the operation and maintenance of the ferry departure flap sign in the central lobby of the Ferry Building. Nematode is neither a small business nor a DBE.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Nematode to extend the period of performance through June 30, 2016, at a cost not to exceed \$215,000, subject to Commission approval of the FY 2015-16 agency budget.



Steve Heminger

SH: KJ

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221, 310-2700

Contractor: MIG, Inc.
Berkeley, CA

Project Title: Public Awareness and Customer Education Services

Purpose of Amendment: Inform transit riders about Clipper[®], how to get a card, how to load value, and how to pay fares with Clipper[®].

Brief Scope of Work: Provide customer education information through printed materials, content on clippercard.com and other websites, and, where appropriate, paid media, i.e., advertisements.

Project Cost Not to Exceed: \$550,000 (this amendment)
Total Contract value including amendments before this amendment = \$3,780,000
Total contract amount with this amendment = \$4,330,000

Funding Source: Regional Measure 2 Marketing and Commuter Benefits

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with MIG, Inc., for the purposes described herein and in the Executive Director's memorandum dated May 1, 2015, and the Chief Financial Officer is authorized to set aside \$550,000 for such amendment, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved: Date: May 27, 2015

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: Synapse Strategies
Oakland, CA

Project Title: Distribution and Communications Planning and Support Services

Purpose of Contract: Provide oversight and support for customer education, distribution, and customer service functions.

Brief Scope of Work: Oversee in-person customer education/outreach services; planning and support services related to Clipper® marketing and communication and customer service initiatives.

Project Cost Not to Exceed: \$200,000 (this amendment)
Total Contract value including amendments before this amendment = \$200,000
Total contract amount with this amendment = \$400,000

Funding Source: Regional Measure 2 Marketing and Commuter Benefits

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Synapse Strategies, for the purposes described herein and in the Executive Director's memorandum dated May 1, 2015, and the Chief Financial Officer is authorized to set aside \$200,000 for such contract amendment, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved: Date: May 27, 2015

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: Caribou Public Relations
Martinez, CA

Project Title: Clipper® Customer Education/Outreach Services

Purpose of Amendment: On-call public outreach services.

Brief Scope of Work: Provide general education and communicate the benefits of Clipper® to Bay Area transit riders, including Title VI protected customers.

Project Cost Not to Exceed: \$125,000 (this Amendment)
Total contract value including amendments before this amendment = \$125,000
Total contract amount with this amendment = \$250,000

Funding Source: Regional Measure 2 Marketing

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Caribou Public Relations for the purposes described herein and in the Executive Director's memorandum dated May 1, 2015, and the Chief Financial Officer is authorized to set aside \$125,000 for such contract amendment, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved: Date: May 27, 2015

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement Amendment

Work Item No.: 320-1221

Contractor: AC Transit
Oakland, CA

Project Title: In-Person Clipper® Customer Service Center at AC Transit Headquarters

Purpose of Amendment: Provide Clipper® in-person customer service center in the East Bay

Brief Scope of Work: Operate Clipper® in-person customer service center at AC Transit's District Headquarters building located at 1600 Franklin Street in Oakland.

Project Cost Not to Exceed: \$250,000 (this amendment)
Total funding agreement value including amendments before this amendment = \$826,200
Total authorized funding agreement amount with this amendment = \$1,076,200.

Funding Source: Regional Measure 2 Operating, Regional Measure 2 Marketing and STA

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a funding agreement amendment with AC Transit, for the purposes described herein and in the Executive Director's memorandum dated May 1, 2015, and the Chief Financial Officer is authorized to set aside \$250,000 for such funding agreement amendment, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved:

Date: May 27, 2015

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract

Work Item No.: 320-1221

Contractor: Nematode Holdings, LLC
San Francisco, CA

Project Title: Customer Service Center/Transportation Information Kiosk
at Embarcadero BART Station Operations

Purpose of Amendment: Provide Clipper® in-person customer service, such as card
replacement and issuance of Senior and Youth cards, and
sell FasTrak® transponders, paper transit fare media, and
operate 511 Departure Times displays.

Brief Scope of Work: Contractor shall provide trained staff to support a range of
Clipper® customer services.

Project Cost Not to Exceed: \$525,000

Funding Source: Regional Measure 2 Operating, Regional Measure 2 Marketing
and STA

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency
budget.

Motion by Committee: That the Executive Director or his designee is authorized to
negotiate and enter into a contract with Nematode Holdings,
LLC, for the purposes described herein and in the Executive
Director's memorandum dated May 1, 2015, and the Chief
Financial Officer is authorized to set aside \$525,000 for such
contract, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved: Date: May 27, 2015

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: Nematode Holdings, LLC
San Francisco, CA

Project Title: Customer Service Center/Bay Crossings at San Francisco Ferry Building Operations

Purpose of Amendment: Provide Clipper® in-person customer service, such as card replacement and issuance of Senior and Youth cards, and sell FasTrak® transponders, distribute MTC project materials and maintain ferry schedule flap sign display.

Brief Scope of Work: Contractor shall provide trained staff to support a range of Clipper® customer services and the operations and maintenance of the ferry schedule flap sign display.

Project Cost Not to Exceed: \$215,000 (this amendment)
Total Contract value including amendments before this amendment = \$989,030
Total authorized contract amount with this amendment = \$1,204,030

Funding Source: Regional Measure 2 Operating, Regional Measure 2 Marketing and STA

Fiscal Impact: Funds dependent on the approval of the FY 2015-16 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Nematode Holdings, LLC, for the purposes described herein and in the Executive Director's memorandum dated May 1, 2015, and the Chief Financial Officer is authorized to set aside \$215,000 for such contract amendment, subject to adoption of the FY 2015-16 agency budget.

Operations Committee:

Scott Haggerty, Chair

Approved: Date: May 27, 2015