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October 24, 2011

Addendum No. 1 to REQUEST FOR QUALIFICATIONS
Clipper[®] Customer Communication, Customer Education, Public Awareness and Strategic
Marketing Services, dated October 7, 2011

Dear Contractor:

This letter is Addendum No. 1 to the Request for Qualifications (RFQ) for Clipper[®] Customer Communication, Customer Education, Public Awareness and Strategic Marketing Services dated October 7, 2011. Where text is revised, deleted text is shown in strike-through format; added text is *italicized*. The RFQ is revised as follows:

<u>Addendum Item</u>	<u>Reference</u>	<u>Change(s)</u>
1	Invitation Letter, <u>Evaluation Factors</u> , Page 3	Interviews, if held, will occur on Tuesday- November 15, 2011 <i>Monday, November 21, 2011.</i>
2	RFQ, Section I. D <u>Minimum Qualifications</u> , Page 3	Second bullet is revised as follows: The firm has successfully completed at least three (3) projects in the past five (5) years substantially similar to three- <i>one</i> or more possible work tasks requested by MTC, as described in Appendix A, <u>Summary of Anticipated Work</u> .
3	RFQ, Section III. D <u>Qualifications and Experience</u> , Page 5	A detailed statement of the firm's qualifications and previous experience in conducting work similar to three one or more tasks described in <i>Appendix A</i> , <u>Summary of Anticipated Work</u> , and short resumes of the personnel the proposer intends to use to perform the task(s), summarizing the individual's training and experience relevant to task(s) in relation to the areas of consultant expertise described below.
4	RFQ, Section III. H <u>Forms and Certificates</u> , Page 5	1. A signed California Levine Act statement (Appendix B E);

The remaining provisions of the RFQ, dated October 7, 2011 remain unchanged. In the event of a conflict between this Addendum and the previous version(s), this Addendum shall take precedence.

Questions and answers regarding this RFQ are enclosed with this Addendum.

Any questions concerning this addendum to the RFQ should be directed to Michele Gillaspie, Clipper® Contracts Coordinator, at (510) 817-5718 or mgillaspie@mtc.ca.gov.

Sincerely,



Andrew Premier
Deputy Executive Director

SH: JA/MG

Request for Qualifications Clipper® Communication, Customer Education, Public Awareness and Strategic Marketing Services (RFQ) Questions & Answers

From Proposers' Conference: October 14, 2011

Q1: Will coordination with transit operators be required?

A1: *Yes. See RFQ, Section 1B, Project Description, #5, page 2.*

Q2: Is part of the focus of this project to promote transit ridership as a whole, or to get current transit riders to use Clipper®?

A2: *See RFQ, Section 1B, Project Description, page 1. The initial goals are to encourage adoption by existing frequent and occasional transit riders; increasing overall use of transit ridership is not a direct objective of this RFQ.*

Q3: What is the reason for a Regional Single Fare Payment card? Was it a cost issue?

A3: *One card facilitates regional travel on multiple transit systems by helping to overcome various customer issues (multiple fare payments types, transparency of transfers, etc.); it also improves reliability and reduces operational costs across the region such as fare gate equipment maintenance and some types of fare evasion.*

Q4: Has MTC collected demographic information?

A4: *MTC performed a customer survey in November, 2010, and is planning to conduct another survey in November, 2011.*

Q5: Is MTC's upcoming research part of this proposed contract, or another vehicle? Who will perform the upcoming customer survey, and what will it entail?

A5: *The upcoming survey will take place before MTC awards any contracts under the RFQ. Synapse Strategies, Oakland, California, will perform the upcoming survey. In 2010, Synapse Strategies performed a telephone survey of customers who have registered Clipper® cards. The upcoming survey will be a mix of on-line and intercept methods to better reach a larger pool of card users.*

Q6: Would MTC prefer more customers to register their cards?

A6: *Yes, there are benefits to registration, such as the ability to replace a lost or stolen card. Security is a value-add.*

Q7: Are the November, 2010 customer survey results available?

A7: *Yes, please see <http://www.mtc.ca.gov/jobs/contracts/>.*

Q8: Who is the incumbent firm?

A8: *Swirl Integrated Marketing, San Francisco, California*

Q9: Can a firm submit an SOQ for only one task?

A9: *See Addenda #1, Items 2 and 3.*

Q10: Is the budget listed in the RFQ for this project in its entirety? For example: are media buys included in that amount?

A10: Yes, the budget estimate shown in the RFQ is inclusive of all costs including media buys and collateral materials. In the past, MTC has periodically added to its Clipper[®]-related public awareness and customer education budget to respond to previously unanticipated programmatic needs.

Q11: In the past, have marketing budgets been cut? How likely is MTC to use the full budget?

A11: This depends on future decisions by MTC's Executive Director and Commission; staff cannot speculate about future decisions. MTC staff recommends reviewing past MTC Operations Committee memos, presentations and meeting minutes to review past decisions about the expenditure of Clipper[®]-related public awareness and customer education funds.

Q12: Please elaborate on how this contract might interact with the Customer Service Center function?

A12: MTC's Clipper[®] project management team includes staff that oversees the customer service responsibilities executed by Cubic Transportation Systems, Inc. MTC expects that vendors performing work under this RFQ will engage not only all members of MTC's Clipper[®] project management team, as necessary, but also staff at Cubic Transportation Systems, Inc. to ensure coordination between awareness/education initiatives and customer support/service functions. See RFQ, Attachment A Summary of Anticipated Work, item #5, page 17.

Q13: How is customer interaction with social media managed?

A13: Because social media is fairly new (the contract with Cubic's predecessor, Motorola, substantially predates the advent of social media) the incumbent marketing firm has performed all Clipper[®] social media operations to date.

Q14: Have some implementations and migrations gone better than others?

A14: Yes, depending on the complexity of the transit operator business rules and degree of 1:1 equivalency between customer behaviors pre and post migration. As an example, SFMTA customers had a high degree of equivalency, allowing for a fairly smooth transition, while Caltrain riders had to make a variety of behavioral changes as part of their migration that made the transition more challenging.

Q15: With all the variables involved in this program, does MTC expect the marketing function to transition during an active campaign?

A15: If necessary, MTC anticipates some period of overlap to effect a transfer of knowledge to the one or more firms qualified under the RFQ. With regard to items #5 and #6 of the Summary of Anticipated Work, page 17 MTC hopes to engage collaboratively with the firm or firms to make best use of our budget.

Q16: Was the incumbent solely responsible for the strategy to date?

A16: The Program's customer awareness and education strategies, to date, are the product of input from the incumbent, MTC staff, MTC's commissioners, and other program partners, e.g. the transit agencies. To date, the incumbent has been primarily responsible for creative work performed in support of the project.

Q17: Is there a place in the SOQ for approach?

A17: Approach is not a component in an RFQ procurement.

Q18: Will there be competitive bids for Task Orders?

A18: MTC may solicit proposals from multiple vendors qualified under this RFQ for a particular task or set of tasks; however, the RFQ process constitutes the competitive procurement portion of any contracts entered into.

Q19: Is MTC aware of the percentage of Limited English Proficiency (LEP) customers?

A19: We know that a consistent 2-3% of calls to the Customer Service Bureau come from LEP customers; we don't have LEP data on our overall customer base. MTC is required to meet the needs of our LEP customers.

Q20: Does MTC have mobile device/smart phone apps on the horizon?

A20: Not at this time.

Q21: With regard to the Minimum Qualifications: where the RFQ mentions "firms", may we infer "teams"?

A21: Yes.

Q22: How many alliances does MTC foresee?

A22: Alliances to date are informal in nature; MTC are interested in formalizing them as described in the RFQ Attachment A, Summary of Anticipated Work item #7, page 17. MTC has no specific number in mind.

Q23: Why are you interested in formalizing such relationships?

Q23: Transit operators have historically had alliances with retailers that were of mutual benefit (e.g. sales of BART tickets and Muni passes). MTC anticipates there may be more sophisticated ways for us to engage beyond our current relationships with retailers.

Q24: With regard to DBE/UDBE Utilization, is a proposer obligated to use any/all DBE/UDBE firms referenced in their SOQ? It is difficult to identify potential partners in the absence of specific goals and task assignments at this point in the process.

A24: If a proposer lists DBE/UDBE firms in its SOQ for specific areas of work, the firm will need to use the DBE/UDBE firms listed for those specific areas of work when/if a Task Order is issued for that work.

Q25: Should proposers identify specific DBE/UDBE firms for potential use for each area in the Summary of Anticipated Work in their SOQ, or can they just list all potential DBE/UDBE subcontractors generally, and use them as necessary?

A25: Firms can do either. Since the DBE/UDBE goals will be determined at the time of Task Order issuance, it allows for more flexibility if DBE/UDBE subcontractors are listed generally. Note: All DBE/UDBE subcontractors listed must perform services related to the preliminary tasks listed in the RFQ.

Q26: Can proposers add additional DBE/UDBE firms to their awarded contracts later in the process?

A26: Additional DBE/UDBE subcontractors can be added to the contract later, subject to approval by MTC.

Q27: Please explain the difference in what you are looking for in the Similar Projects section vs. the Work Samples section?

A27: The Similar Projects section (see RFQ, Section III E, page 5) should be a prose description of projects delivered/completed/in progress. Work samples (see RFQ, Section III F, page 5) should be exhibits that show, for example, the firm's creative abilities.

Q28: Please confirm that Exhibit E- California Levine Act statement is required as well as the Rate Sheet? Page 5 says Appendix B is the Levine Act, but it looks like Appendix B is the Rate Sheet.

A28: Yes, a Levine Act statement is required. See Addenda #1, Item 4.

Q29: Please describe to the extent that Exhibit F-3 should be completed, since this will depend on specific tasks in forthcoming task orders?

A29: Instructions for completing Exhibit F-3, can be found on page 42 of the RFQ. As description of services and DBE/UDBE participation percentage amounts will be determined upon Task Order issuance, proposers may put "TBD" in those fields at this time.

Q30: Can you explain the requirements for Appendix F-5, Good Faith Efforts if the Prime proposer is a UDBE? Is more outreach to build a team required?

A30: Appendix F-3, F-4 and F-5 should be completed and submitted even if the proposer is a UDBE. No, additional outreach is required if a proposer is a UDBE.

Q31: With regard to Appendix F, Federal Requirements, Department of Transportation Requirements, paragraph 2: Disadvantaged Business Enterprise (DBE). You do not specify which DBE certifications will be considered. Please clarify which certifications are sufficient to be considered as a DBE in this RFQ process.

A31: See RFQ, Section V F, Subarticle 4A.