



Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Agenda

Clipper® Executive Board

Committee Members:

Denis Mulligan, Chair Edward D. Reiskin, Vice Chair

*Grace Crunican, Nuria Fernandez, Jim Hartnett,
Steve Heminger, Michael Hursh, Rick Ramacier,
Nina Rannells*

Monday, August 22, 2016

4:00 PM

Meeting Location:
San Francisco Bay Area Rapid Transit District
344 20th Street, 3rd Floor
Oakland CA, 94612
BART Board Room

This meeting will be recorded. Copies of recordings may be requested at the Metropolitan Transportation Commissioner (MTC) at nominal charge, or recordings may be listened to at MTC offices by appointment.

To access meeting location, please access through the Webster Street entrance between CVS Pharmacy and 24-Hour Fitness. Take the elevator to the 3rd floor and exit the elevator to your right where the agenda will be posted. Please enter the room through the double doors. For meeting location questions, please contact Angelica Dill-James at 510-464-6093.

1. Roll Call / Confirm Quorum

Quorum: A quorum of this committee shall be a majority of its regular voting members (5).

2. Consent Calendar

2a. [15-1783](#) Minutes of July 25, 2016 meeting

Action: Board Approval

Attachments: [2a_CEB Minutes_July 2016_v4](#)

3. Information

- 3a.** [15-1837](#) Next-Generation Clipper® (C2) Legal Services: Thompson Coburn LLP
- Introduction of lead attorneys.
- Action:** Information
- Presenter:** Melanie Morgan
- Attachments:** [3a Next Gen Clipper Legal Services Thompson Coburn_v3](#)
-
- 3b.** [15-1797](#) Next-Generation One Regional Card for All (ORCA) Request for Information (RFI) Summary
- Update from Puget Sound / Seattle region's next-generation transit fare payment system RFI findings.
- Action:** Information
- Presenter:** Brittany Esdaile, Sound Transit
- Attachments:** [3b ORCA RFI Summary](#)
-
- 3c.** [15-1795](#) Next-Generation Clipper® (C2) Request for Expressions of Interest (RFEI) Update
- Initial results and findings following C2 RFEI vendor meetings.
- Action:** Information
- Presenter:** Edward Meng
- Attachments:** [3c C2 RFEI Update](#)
-
- 3d.** [15-1802](#) Next Generation Clipper® (C2) Project Approach
- Update on current overall C2 project approach.
- Action:** Information
- Presenter:** Jason Weinstein
- Attachments:** [3d C2 Project Approach](#)
-
- 3e.** [15-1796](#) Clipper® Customer Satisfaction Survey Results
- Findings from the bi-annual Clipper® Customer Satisfaction Survey.
- Action:** Information
- Presenter:** Kelley Jackson
- Attachments:** [3e Clipper Customer Satisfaction Survey Results](#)

4. Executive Director's Report - Kuester

4a. [15-1872](#)

Action: Information

Attachments: [4_ED_Report_v1](#)

5. Public Comment / Other Business

6. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be September 26, 2016, 4:00 p.m. in the BART Board Room, 3rd Floor, 344 20th Street, Oakland, CA.

Public Comment: The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

Meeting Conduct: If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Committee may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

Record of Meeting: Committee meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site (mtc.ca.gov) for public review for at least one year.

Accessibility and Title VI: MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.

可及性和法令第六章: MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者, 請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知, 以滿足您的要求。

Acceso y el Titulo VI: La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Attachments are sent to Committee members, key staff and others as appropriate. Copies will be available at the meeting.

All items on the agenda are subject to action and/or change by the Committee. Actions recommended by staff are subject to change by the Committee.



Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1783 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 7/7/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**
Title: Minutes of July 25, 2016 meeting
Sponsors:
Indexes:
Code sections:
Attachments: [2a_CEB Minutes_July 2016_v4](#)

Date	Ver.	Action By	Action	Result
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Subject:
Minutes of July 25, 2016 meeting

Recommended Action:
Board Approval

Attachments



Agenda Item 2a

Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Minutes - Draft

Clipper® Executive Board

Committee Members:

Denis Mulligan, Chair Edward D. Reiskin, Vice Chair

*Grace Crunican, Nuria Fernandez, Jim Hartnett,
Steve Heminger, Michael Hursh, Rick Ramacier,
Nina Rannells*

Monday, July 25, 2016

4:00 PM

Meeting Location:
Caltrain / SamTrans
1250 San Carlos Ave, 2nd Floor
San Carlos CA, 94070
Caltrain / SamTrans Auditorium

1. Roll Call / Confirm Quorum

Present: 5 - Hursh, Chair Mulligan, Fernandez, Heminger, and Hartnett

Absent: 4 - Rannells, Ramacier, Vice Chair Reiskin, and Crunican

Diana Hammons acted as a delegate and voting member of the Board in place of Edward D. Reiskin. Actions noted below as "Reiskin" were taken by Hammons.

Cater Mau acted as a delegate and voting member of the Board in place of Grace Crunican. Actions noted below as "Crunican" were taken by Mau.

Board Member Heminger arrived after the approval of Clipper® Universal Pass Distribution.

2. Consent Calendar

Upon the motion by Fernandez and second by Hursh, the Consent Calendar was unanimously approved. The motion carried by the following vote:

Aye: 6 - Hursh, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican and Hartnett

Absent: 3 - Rannells, Ramacier and Heminger

2a. [15-1674](#) Minutes of May 23, 2016 meeting

Action: Board Approval

Attachments: [2a CEB Minutes May 2016](#)

- 2b. [15-1684](#) Contract Amendment - Clipper® Technical Advisor Contract: CH2M, Inc. (\$1,350,000)

Action: Affirm May 23, 2016 Board Approval

Presenter: Jason Weinstein

Attachments: [2b Clipper Tech Advisor Amendment](#)

Approval

- 3a. [15-1780](#) Clipper® Universal Pass Distribution

Distribution of the Universal Regional Pass during the Rail~Volution National Conference in October 2016 and the California Transit Association Annual Fall Conference in November 2016.

Action: Board Approval

Presenter: Abigail Thorne-Lyman, BART and Michele Joseph, AC Transit

Attachments: [3a Clipper Universal Pass v6.pdf](#)

Upon the motion by Hursh and second by Fernandez, this item was unanimously approved. The motion carried by the following vote:

Aye: 6 - Hursh, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican and Hartnett

Absent: 3 - Rannells, Ramacier and Heminger

4. Information

- 4a. [15-1675](#) Request for Expressions of Interest (RFEI) Initial Analysis

Initial analysis of Next Generation Clipper® System Expressions of Interest

Action: Information

Presenter: Jason Weinstein

Attachments: [4a RFEI Initial Analysis](#)

Adina Levin, a member of the public, spoke on this item.

4b. [15-1777](#) Request for Expressions of Interest (RFEI) Vendor Meetings

Update on selected vendor meetings of Next Generation Clipper® System (C2) Expressions of Interest.

Action: Information

Presenter: Denise Rodrigues

Attachments: [4b_RFEI Vendor Meetings](#)

The Executive Board requested MTC to meet with all 18 RFEI respondents.

4c. [15-1778](#) Next-Generation Clipper® (C2) System Requirements Update

Update on top level requirements of C2.

Action: Information

Presenter: Jason Weinstein

Attachments: [4c_C2 System Requirements Update](#)

5. Executive Director's Report - Kuester

5a. [15-1801](#)

Action: Information

Attachments: [5a_Handout-ED_Report](#)

6. Public Comment / Other Business

7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be August 22, 2016, 4:00 p.m. in the BART Board Room, 3rd Floor, 344 20th Street, Oakland, CA.



Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1837 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 8/3/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**
Title: Next-Generation Clipper® (C2) Legal Services: Thompson Coburn LLP
Introduction of lead attorneys.

Sponsors:

Indexes:

Code sections:

Attachments: [3a Next Gen Clipper Legal Services Thompson Coburn v3](#)

Date	Ver.	Action By	Action	Result
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Subject:

Next-Generation Clipper® (C2) Legal Services: Thompson Coburn LLP

Introduction of lead attorneys.

Presenter:

Melanie Morgan

Recommended Action:

Information

Attachments



Agenda Item 3a
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105
TEL 415.778.6700
WEB www.mtc.ca.gov

TO: Clipper® Executive Board

DATE: August 15, 2016

FR: Carol Kuester

RE: Next-Generation Clipper® (C2) Legal Services: Thompson Coburn LLP

In May 2016, the Executive Board approved a contract with Thompson Coburn LLP for C2 legal services in an amount not to exceed \$450,000. Since early July 2016, MTC's Office of General Counsel and Clipper® staff have been working with the lead attorneys on the Thompson Coburn team, Rhonda Thomas and Anthony Anderson, to refine the preliminary C2 procurement process and schedule. With their recent experience with the Chicago Transit Authority (CTA) on the implementation of the Ventra fare collection system for CTA, Metra and Pace (involving bus, light rail and commuter rail), we have already found them to bring valuable insights and innovative approaches to the challenges posed by the C2 procurement.

We have just concluded our first on-site working session, and invited Rhonda Thomas and Anthony Anderson to today's meeting of the Board.

Carol Kuester



Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #:	15-1797	Version:	1	Name:	
Type:	Report	Status:		Informational	
File created:	7/19/2016	In control:		Clipper® Executive Board	
On agenda:	8/22/2016	Final action:			
Title:	Next-Generation One Regional Card for All (ORCA) Request for Information (RFI) Summary Update from Puget Sound / Seattle region's next-generation transit fare payment system RFI findings.				
Sponsors:					
Indexes:					
Code sections:					
Attachments:	3b_ORCA RFI Summary				

Date	Ver.	Action By	Action	Result
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Subject:

Next-Generation One Regional Card for All (ORCA) Request for Information (RFI) Summary

Update from Puget Sound / Seattle region's next-generation transit fare payment system RFI findings.

Presenter:

Brittany Esdaile, Sound Transit

Recommended Action:

Information

Attachments



Agenda Item 3b
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105
TEL 415.778.6700
WEB www.mtc.ca.gov

TO: Clipper® Executive Board

DATE: August 15, 2016

FR: Carol Kuester

RE: Next-Generation One Regional Card for All (ORCA) Request for Information (RFI) Summary

Background

ORCA is the regional contactless smart card fare payment system currently used in the Puget Sound (Seattle) region of Washington State. ORCA was publicly launched in 2009, and is accepted for fare payment on seven agencies and four modes (bus, ferry, rail, train) in the region. ORCA is governed by a Joint Board which is comprised of an executive or designee from each of the ORCA partner agencies, and is bound by an inter-local agreement which defines the structure of ORCA and agency responsibilities.

The seven partner agencies provide about 600,000 transit rides on a typical weekday, two thirds of which are paid for using an ORCA card. The current ORCA regional fare collection system, charges customers by deducting value and verifying pass value from an ORCA card in accordance with fare policies established by each transit operator. The system apportions the associated revenue to each transit operator through an automated financial settlement process. The apportionment happens on a per-trip basis for regional transfers and pass products. To date, more than 2.25 million ORCA cards have been issued. ORCA processes more than 11 million transactions in a typical month; a transaction occurs when a customer pays a fare using an ORCA card or adds value to an ORCA card.

Request for Information

In December 2015, Sound Transit, one of the seven ORCA agencies, released an RFI for a Next-Generation ORCA system (ngORCA) which requested vendor feedback on account or card-based systems, communications, open payments and architecture, amongst many other design, system, and contractual options. Sound Transit received 12 RFI responses, including nine from fare system vendors. Attachment A summarizes the vendor community responses.

The findings from the ORCA RFI responses almost entirely align with our preliminary C2 RFEI findings. In particular, vendor feedback has been consistent in response to several topics, including account-based systems, transition options, communications, open architecture, and system integration. To share their experience and lessons learned with this Board, we have invited Brittany Esdaile, the Regional Program Manager for Next Generation ORCA, here today to present findings from the Next Generation ORCA (ngORCA) RFI process, as well as some of the lessons learned from the RFI responses.

Clipper® program staff will continue to collaborate with our peers at the ORCA Program and monitor other transit fare payment industry updates, and look forward to updating the Executive Board of any new developments.



Carol Kuester

Attachment:

- Attachment A: Next Generation ORCA RFI Summary

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next generation
ORCA

RFI Summary

June 13, 2016

We received 12 RFI responses from:

- 7 “full” and 2 “limited” fare system vendors
- 1 distribution, mobile ticketing, payments gateway vendor

Vendor experience delivering systems:

- Account-based - *most*
- Open payment - *half*
- Open architecture - *some*
- Card → Account transition – *a few*
- Multi-agency experience - *half*

AFFIRMING OUR CONCEPT

- Account-Based: *Nearly all* fare system vendors are offering account-based solutions
- Fare Simplification: *All* fare system vendors recommend fare simplification for saving on cost, timeline, customer complexity, and operational complexity
 - *Most* vendors recommend fare capping in order to simplify products and give customers “best fare”
- Contracts: *Most* vendors offer *both* DBOM and Systems Integrator models; prefer capital cost with annual O&M

- Transition: A variety of transition options were proposed. This helped to lead us to consider a backend-parallel transition strategy.
- Real-Time Communications: *Most* fare system vendors are optimistic, *some* expressed cautions on availability.
- Open Architecture: *Most* fare system vendors are promoting “open” solutions, *but* there are many interpretations. A licensed API model is likely.
- Integration: *Most* have integrated with onboard bus systems (not via open APIs); *A few* have integrated with other 3rd parties (parking, tolling, bike share, etc.)

1. Define a solid customer education/marketing campaign
2. Have well-defined business rules (fares, apport., retail)
3. Have an empowered, dedicated multi-agency team to make decisions
4. Increase customer service resources during transition
5. Issuing open payment media can be costly
6. Factor communications limitations into transactions
7. Obtain access to existing system documentation
8. Leverage retail POS networks instead of retail terminals



Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1795 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 7/19/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**
Title: Next-Generation Clipper® (C2) Request for Expressions of Interest (RFEI) Update
Initial results and findings following C2 RFEI vendor meetings.

Sponsors:

Indexes:

Code sections:

Attachments: [3c_C2 RFEI Update](#)

Date	Ver.	Action By	Action	Result
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Subject:

Next-Generation Clipper® (C2) Request for Expressions of Interest (RFEI) Update

Initial results and findings following C2 RFEI vendor meetings.

Presenter:

Edward Meng

Recommended Action:

Information

Attachments



Agenda Item 3c
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105
TEL 415.778.6700
WEB www.mtc.ca.gov

TO: Clipper® Executive Board

DATE: August 15, 2016

FR: Carol Kuester

RE: Next-Generation Clipper® (C2) Request for Expressions of Interest (RFEI) Update

On April 4, 2016 we issued a Request for Expressions of Interest (RFEI) regarding C2. We received responses from 18 firms (see Attachment A for details).

At the July 25, 2016 Executive Board meeting, we presented preliminary findings from the written C2 RFEI responses. In July and August, representatives from MTC, the partner agencies and IBI Group had one-on-one meetings or phone calls with all 18 firms.

The one-on-one meetings primarily clarified and confirmed the recommendations staff shared with this Board in July (Attachment B.) However, we are recommending one modification to our previously proposed approach: instead of pre-selecting a pool of CSC vendors, and requiring the C2 system integrator choose from that pool, we believe that the region should select the CSC vendor through a wholly separate procurement process. This approach allows the region to select the best vendor for the customer service center work. It also has the advantage of allowing the C2 system integrator to know who the CSC vendor will be prior to their final proposal. This change in recommendation is highlighted in Attachment B.

A final summary of the RFEI written responses and one-on-one meetings will be completed in late August and early September, and presented to this Board in September.

Carol Kuester

Attachments:

Attachment A: C2 RFEI Respondents and Areas of Interest

Attachment B: C2 RFEI Analysis

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C2 RFEI Respondents and Areas of Interest

Firm	System Integrator	Customer Service Center	Other
Accenture	X		
Cardtek	X	X	
Cubic Transportation Systems	X	X	
FAMOCO			X
Faneuil		X	
FEIG Electronics			X
First Data Government Solutions			X
Genfare			X
Infineon Technologies			X
INIT Innovations in Transportation	X		
Moovel			X
NEC Corporation	X	X	
Scheidt & Bachmann	X	X	
Thales Transport and Security	X		
Vertiba			X
Vix Technology	X	X	
WSP Parsons Brinckerhoff		X	
Xerox Transportation Solutions	X	X	



C2 RFEI Analysis

Clipper® Executive Board
August 15, 2016

Agenda Item 3c
Attachment B

Vendor Input & Proposed Recommendations

	Current Plan, July 25, 2016 (based on written RFEI Input)	Recommendation, August 22, 2016 (based on RFEI meetings)
1. C1 Operations and C2 Transition	System Integrator (SI) assumes C1 Operations on November 2019	Proceed, while ensuring a level playing field during procurement process
2. C2 Implementation Schedule	SI handles requirements, build, test, phased deployment, and full transition	Proceed, even if more time is required
3. Customer Service Center Pre-selection	Region to select pool of sub-vendors with SI choosing from that pool	Slight modification - Region to select sub-vendor through separate procurement
4. Device Selection (multiple suppliers)	SI to create a pool of device vendors (including SI's own devices)	Proceed
5. Account Based Communications	Evaluating if C1 could be improved by doing a communications upgrade early	Wait for more information
6. Fare Policy & Business Rules	Simplify where possible	Proceed, evaluating where further regional simplification can occur
7. C2 Implementation Cost	Federal Transit Funding, Cap and Trade and other sources to be determined	Wait for more information





Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1802 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 7/25/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**
Title: Next Generation Clipper® (C2) Project Approach
Update on current overall C2 project approach.

Sponsors:

Indexes:

Code sections:

Attachments: [3d_C2 Project Approach](#)

Date	Ver.	Action By	Action	Result
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Subject:

Next Generation Clipper® (C2) Project Approach

Update on current overall C2 project approach.

Presenter:

Jason Weinstein

Recommended Action:

Information

Attachments



Agenda Item 3d
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105
TEL 415.778.6700
WEB www.mtc.ca.gov

TO: Clipper® Executive Board

DATE: August 15, 2016

FR: Carol Kuester

RE: Next Generation Clipper® (C2) Project Approach

Background

In March 2015, MTC approved a contract with the IBI Group to provide C2 consultant support, following a competitive process in which Clipper® transit operators participated. At the March 28, 2016 Executive Board meeting, the Board approved release of Request for Expressions of Interest (RFEI), and on May 23, 2016, the Executive Board approved a high-level schedule for the region's new electronic fare collection system (C2). The approach that was described in the materials presented to the Board included:

- Issuing a RFEI to the fare collection industry;
- Creating a procurement approach to find a System Integrator (SI) partner;
- Positioning more of the detailed requirements to a point after the selection of the SI vendor; and
- Assuring the SI was on-board to manage the transition, in order to receive training and assume on-going Clipper® operations when the current contract expires in November 2019.

Program Developments

Based on direction from the Executive Board, MTC and participating transit agencies recently met with all vendors who submitted Expressions of Interest for the C2 RFEI. The preliminary outcomes from the written responses and meetings from the vendor community contributed to refinements in the C2 procurement approach originally presented in May 2016. Transit agency staff have been briefed on Attachment A, a modified high level schedule, which includes:

- Two separate procurements for payment gateways and fare media, which were planned but not originally shown on the C2 high level schedule;
- Addition of protest periods for each procurement;
- Removal of the RFQ to allow more time for the RFP process. Meetings with several of the RFEI vendors reinforced the notion that an RFQ process that removes some competition early may not be in the best interest of the Program. Extending the RFP process accommodates more vendors in the process and allows more time for contract and BAFO negotiations which will reduce schedule risk; and
- Changing the assumption of the SI selecting the Customer Service Center vendor to a separate regional procurement.

Recommendation

MTC and partner agency representatives believe, given the response learned from industry through the RFEI process and discussions with legal counsel, that the modified C2 project approach best sets the program up to successfully meet the high-level goals for C2 adopted in the Memorandum of Understanding. We recommend that the Executive Board support the new C2 schedule and slight modifications to the approach presented in the attachments.



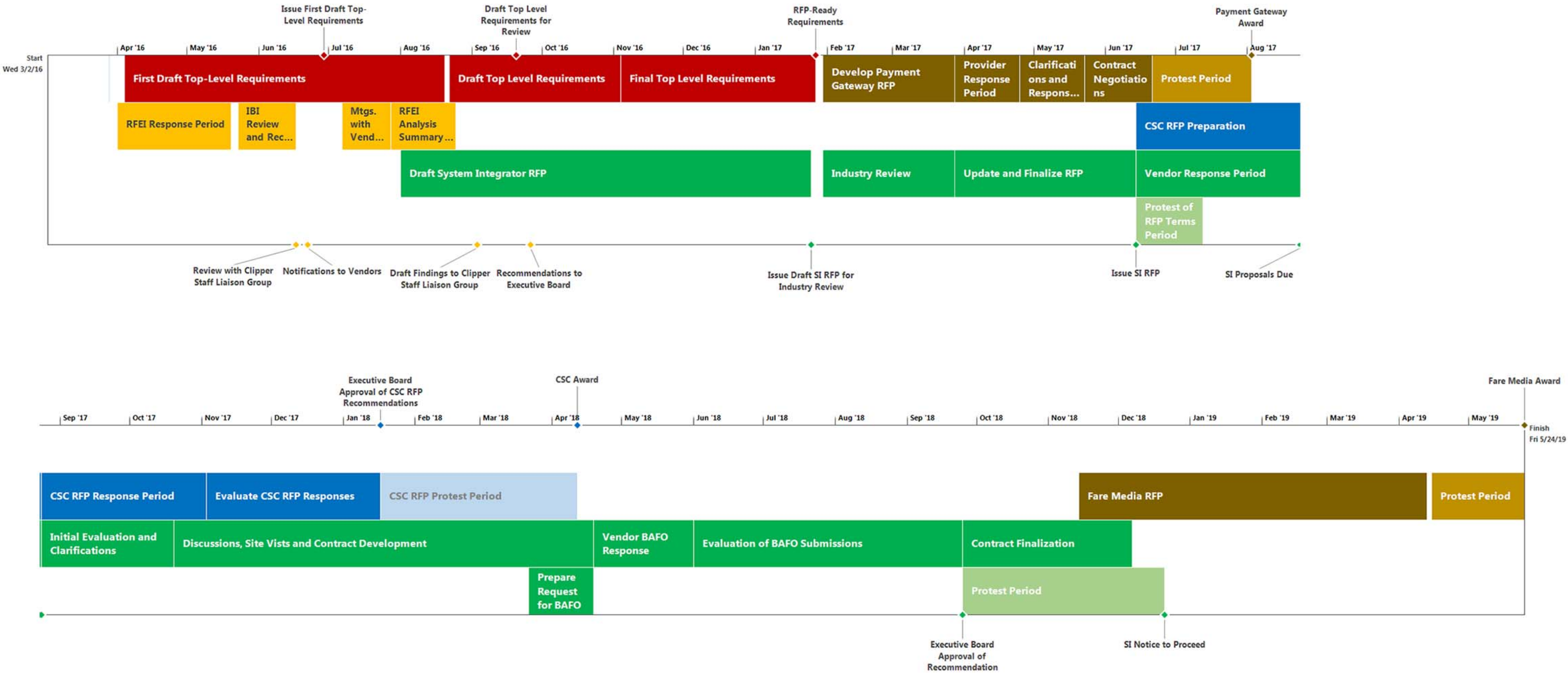
Carol Kuester

Attachment:

Attachment A: C2 High Level Schedule, August 2016

Attachment B: C2 Project Approach

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This schedule reflects the following changes from the schedule presented on May 23, 2016:

- Addition of two separate procurements for payment gateways and fare media, which were planned but not originally shown on the C2 high level schedule (in brown);
- Addition of protest periods for each procurement (in lighter shades);
- Removal of the RFQ to allow more time for the RFP process, which will reduce schedule risk; and
- Changing the assumption of the SI selecting the Customer Service Center vendor to a separate regional procurement (in blue).



C2 Project Approach

Clipper® Executive Board
August 22, 2016

C2 Project Approach

based on May 23 2016 schedule, presented at July 25 Executive Board meeting

Approach Summary

- Two Requests for Proposals (RFPs)
 - SI (System Integrator) and CSC vendors (Customer Service Representatives)
 - MTC/Region choose list of CSC by June 2017
 - SI must use one or more from list
- IBI provide ~40% of functional requirements
 - SI to work with Region to develop remainder of requirements that fits their solution

C2 System Integrator (SI) - contract by February 2019

- RFQ Nov 2016, RFP June 2017, Award Fall 2018, Contract Feb 2019
- Assumes C1 Operations - Nov 2019
 - Requires 9 months of training by C1 vendor
- Does not require C1 Cubic contract extension



Modified C2 Project Approach

based on August 22 2016 schedule

Approach Summary

- Two Requests for Proposals (RFPs)
 - SI (System Integrator) and CSC vendors (Customer Service Representatives)
 - MTC/Region choose list of CSC by **Jan 2018**
 - **MTC will manage the CSC, SI will provide Customer Service Management software system**
- IBI provide ~40% of functional requirements
 - SI to work with Region to develop remainder of requirements that fits their solution

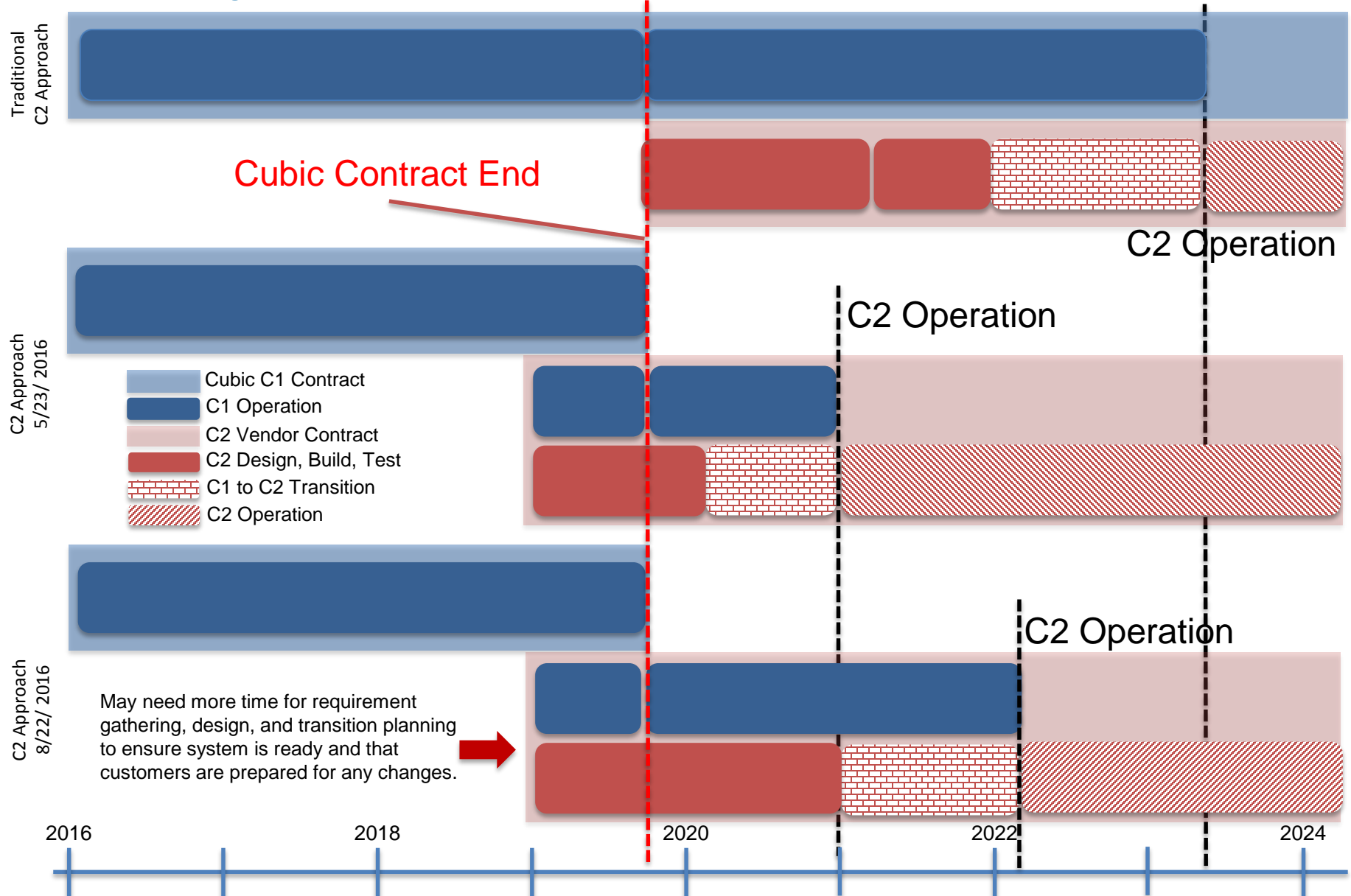
C2 System Integrator (SI) - contract by February 2019

- ~~RFQ Nov 2016~~, RFP Jun 2017, Award **Dec** 2018, Contract Feb 2019
- Assumes C1 Operations - Nov 2019
 - Requires 9 months of training by C1 vendor
- Does not require C1 Cubic contract extension

Thompson-Coburn and MTC Procurement will assure that the RFP and procurement process is a level playing field for all prospective vendor partners.



Comparison Timelines





Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1796 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 7/19/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**
Title: Clipper® Customer Satisfaction Survey Results

Findings from the bi-annual Clipper® Customer Satisfaction Survey.

Sponsors:

Indexes:

Code sections:

Attachments: [3e Clipper Customer Satisfaction Survey Results](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® Customer Satisfaction Survey Results

Findings from the bi-annual Clipper® Customer Satisfaction Survey.

Presenter:

Kelley Jackson

Recommended Action:

Information

Attachments



Agenda Item 3e
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105
TEL 415.778.6700
WEB www.mtc.ca.gov

TO: Clipper® Executive Board

DATE: August 15, 2016

FR: Carol Kuester

RE: Clipper® Customer Satisfaction Survey Results

MTC engaged Corey, Canapary & Galanis (CC&G) to complete our bi-annual Clipper® customer satisfaction survey for fiscal year 2015-16. This survey effort involved a quantitative and qualitative component.

The quantitative survey, which focused largely on information resources, asked customers to rate their satisfaction with Clipper® on a 1 to 5 scale, with 5 being the most satisfied. The results indicate that current Clipper® customers are very satisfied using their card, with a mean (average) rating of 4.3 out of 5. This is the equivalent of 97 percent rating their satisfaction level a 3, 4 or 5. When asked if they would recommend Clipper®, 93 percent of users said they would recommend Clipper® and rated the statement 3, 4 or 5, providing an overall rating of 4.49. Attachment A includes more topline results from the quantitative survey.

The qualitative survey suggests that the Clipper® website is customers' primary resource, but that some people who have not opted in to receive email updates from Clipper® might find value in such emails and could be enticed to opt in if provided some incentive. Three-fourths of those interviewed expressed a preference for customer service provided by a person, rather than self-help services, and the vast majority of these prefer to receive help over the phone. Thirty-seven percent said they desired no improvements in Clipper®, while smaller percentages requested improvements in add-value and Autoload processes and better access to current card balances. Attachment B presents the high-level results of the qualitative survey.

Methodology

In past years, MTC's primary means of conducting Clipper® customer satisfaction surveys involved calling a random sample of registered customers. However, state privacy laws now severely restrict our ability to contact Clipper® customers by phone. Therefore, MTC implemented an intercept survey (offered in English, Spanish and Chinese) that was complemented by the option to complete a mail-in survey or call a phone number to complete the survey in a language other than English, Spanish or Chinese.

The intercept survey was conducted in November 2015 among Clipper® users on 13 different transit systems in the Bay Area. In total, CC&G collected 2,127 completed quantitative surveys, including contact information from approximately 400 respondents willing to participate in the follow-up qualitative survey. In April 2016, CC&G completed 95 qualitative surveys among this pool of respondents.

The quantitative survey included questions about overall satisfaction with Clipper®, as well as satisfaction with Clipper® customer service and Autoload for customers who had used these features. The survey also included questions about transit use, typical means of adding value, awareness and usage of Autoload, interactions with Clipper® customer service, and demographic information so that we could also analyze customer satisfaction in the context of these variables.

The qualitative survey focused on Clipper® awareness, information resources, customer service preferences, and positive and negative attributes.

We cannot directly compare the results of the fall 2015 survey to those of prior surveys due to the change in methodology. While in past years we only reached registered customers who had provided valid phone numbers, the intercept methodology enabled us to collect data from unregistered customers, who do not have access to the full range of Clipper® features, such as Autoload, card balance protection and online account management. Knowing that transit riders would have limited time to complete the survey, we streamlined the questionnaire and only retained core questions from previous Clipper® surveys. We anticipated that the follow-up qualitative survey would provide us with an opportunity to ask questions to gather data on other areas of interest to the transit operators and MTC.

Transit operator representatives reviewed the quantitative and qualitative survey instruments and provided feedback based on their own survey efforts. With input from the operators, we developed a qualitative survey questionnaire to collect data about how unregistered and registered customers use Clipper® and their preferred channels for accessing customer service assistance and information about Clipper® and transit.

Conclusion

We anticipate that the results of this survey effort will help us identify opportunities for improving the current system and customer communications interfaces, as well as inform our next-generation Clipper® planning efforts.



Carol Kuester

Attachments:

- Attachment A: Clipper® Customer Satisfaction Quantitative Survey Topline Results
- Attachment B: Clipper® Customer Qualitative Survey Topline Results
- Attachment C: Clipper® Customer Survey Results

Clipper® Customer Satisfaction Quantitative Survey Topline Results

Satisfaction with Clipper®

- Clipper® users are very satisfied with Clipper®, with a mean (average) rating of 4.3 out of 5; 97 percent rated Clipper® a 3, 4 or 5.
- Ninety-three percent of users said they would recommend Clipper® with an overall rating of 4.49.

Adding Value to Clipper®

- Thirty-seven percent typically add value at a transit station or terminal, while 29 percent had used Autoload, and 25 percent add value at a store or retail location. (Multiple responses accepted.)

Autoload

- Thirty-one percent of Clipper® users are currently using Autoload.
- Of those who have *never* used Autoload, 51 percent had never heard of it, while 49 percent said they were aware of it, but do not use it.
- Autoload users give it an average satisfaction rating of 4.17 (out of 5), with 93 percent of respondents rating their Autoload experience 3, 4 or 5.

Clipper® Customer Service

- More than a quarter (26 percent) of respondents have contacted Clipper® Customer Service in the past 12 months; most did so by phone (74 percent), while 20 percent contacted Clipper® Customer Service online and 19 percent did so in person. Multiple responses were allowed.
- Those who contacted Clipper® Customer Service rated their interaction 3.96 (out of 5), with 87 percent rating their experience "3", "4" or "5."

Improvements to Clipper®

- When asked for one key suggestion to improve Clipper®, 18 percent of respondents said to either address Autoload or other loading/reloading issues, while 13 percent said addressing equipment or location issues.

Clipper® and Transit Use

- Most Clipper® users (87 percent) used public transit in the Bay Area at least three days per week.
- When asked which transit systems they have used in the past three months, respondents most often said San Francisco Bay Area Rapid Transit District (67 percent), Muni/ San Francisco Municipal Transportation Agency (43 percent), Alameda-Contra Costa Transit District (28 percent), and Caltrain (23 percent).
- Sixty-four percent have had their Clipper® card for more than year.

Clipper® Customer Qualitative Survey Topline Results

Clipper® Awareness and Use

- Respondents cited friends and family, a flyer or ad, and something they saw at a transit agency, station or stop or transit agency staff as most common ways they found out about Clipper®.
- A majority said they always use Clipper® when riding public transit in the Bay Area.
- The most common reasons given for not always using Clipper® were:
 - Concerns about overcharges or the belief that some paper forms of ticketing provide a better value;
 - Occasionally forgetting or misplacing their Clipper® card; and
 - Mistrust of some agencies' administration of Clipper® on their systems.

Clipper® Information

- Most respondents would use the Clipper® website as a resource, although a significant number would rely on transit agency staff.
- On the subject of opt-in emails, more than half of registered cardholders who do not currently receive such emails say they just don't want or need such emails or do not really use email, but about a quarter of those currently not receiving emails say they do not recall that such emails were ever offered. Promotions, discounts, and free rides could entice those currently not subscribed to reconsider.
- About two thirds of those whose cards are not registered did not know that they could receive emails from Clipper® once they register their card. About half of these respondents indicated they might be interested in registration in order to receive email updates – particularly if the updates included discounts or other financial incentives.

Customer Service

- When asked how they preferred to be helped when they had a problem or question about their Clipper® card, three-fourths said they would prefer to receive help from an actual person, as opposed to self-serve options (like an online form or an automated phone service).
 - Of the respondents who indicated they preferred help from an actual person, most respondents said phone was their preferred method of personal contact.
 - While only a small number would prefer in-person help, most of these indicated they would travel up to 10 miles for this type of assistance.

Positive/Negative Attributes of Clipper®

- Respondents said Clipper®'s best features were ease of use, not having to wait in line to buy tickets or passes, use on multiple agencies and relatively easy to load/Autoload.
- When asked for suggested improvements to Clipper®, more than a third said 'nothing' or otherwise indicated there was nothing to improve that they could think of (a very positive response).
- The top areas for improvements identified were:
 - Improvements to online payments, reloading, or Autoload
 - Greater access to current card balance
 - More ways to add value quickly (particularly at transit stations/terminals)



Clipper[®]

Customer Survey Results

Clipper Executive Board

August 22, 2016

Agenda Item 3e
Attachment C

Methodology

Two-part research initiative

- 2,127 intercept surveys conducted on 13 agencies in November 2015
 - Margin of error was +/- 2.1% at the 95% confidence level
- 95 in-depth phone interviews in April with survey respondents who agreed to follow-up calls
 - Not statistically significant, but provides indicators about customer experiences and preferences

Involved both registered and unregistered customers

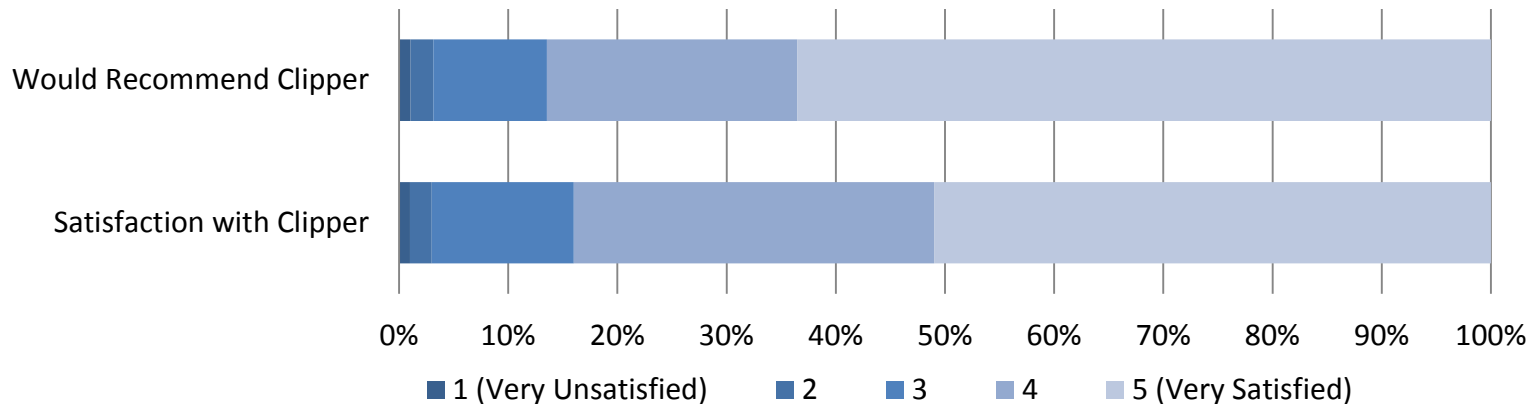


Clipper Survey Demographics

Age		Employment	
18-34	43%	Employed full-time	68%
35-54	34%	Student	12%
55-64	13%	Employed part-time	10%
65+	8%		
Income		Ethnicity*	
<\$25K	20%	White	55%
\$25K-49K	19%	Asian	27%
\$50K-74K	16%	African American	13%
\$75K+	25%	*multiple responses allowed	
Gender		Hispanic	
Male	53%	No	81%
Female	47%	Yes	19%

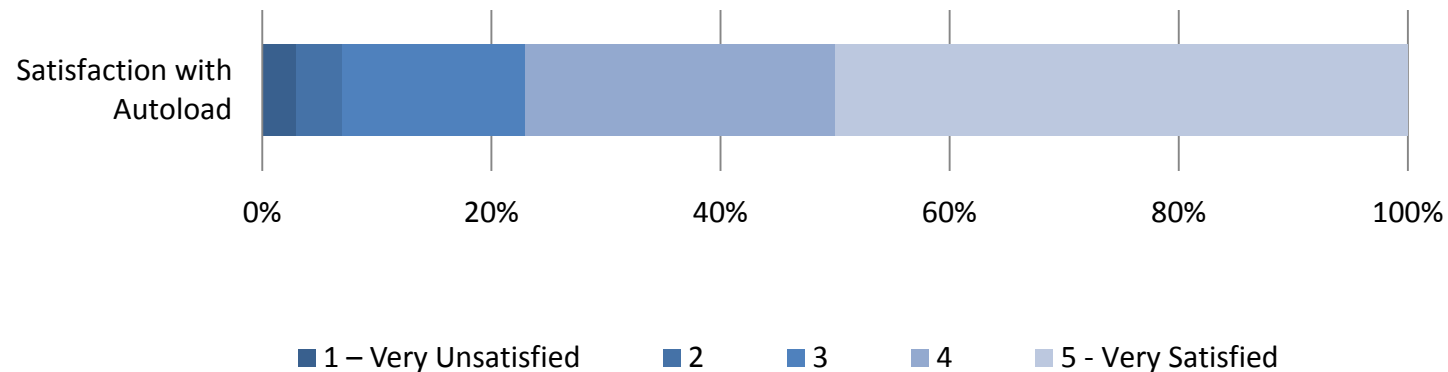
Customer Satisfaction

- Clipper users are very satisfied with Clipper, with an average (mean) rating of 4.30 out of 5.00; 97% rated Clipper a 3, 4 or 5
- 93% of users said they would recommend Clipper with an overall rating of 4.49



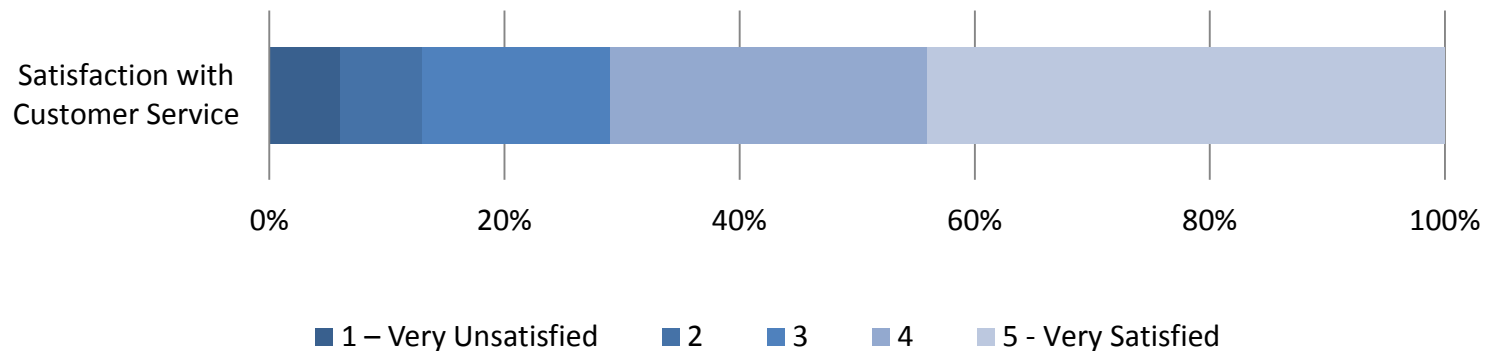
Autoload

- Roughly two-thirds of respondents are aware of Autoload
- Fewer than one-third of respondents currently use Autoload
 - Autoload users rate the feature 4.17 out of 5.00, with 93% rating their Autoload experience 3, 4 or 5



Customer Service

- Roughly one-quarter have contacted Clipper Customer Service
- Three-quarters of these did so by phone
- 87% who contacted Clipper Customer Service reported satisfaction (3, 4 or 5) with an average rating of 3.96 out of 5.00



In-Depth Interview Highlights

- The website is the primary resource for Clipper information, though many would also rely on transit agency staff
- Some were unfamiliar with the opt-in emails, but many were not interested without a financial incentive
- Most prefer receiving customer service via a live person on the phone

Best Features	Areas for Improvement
<ul style="list-style-type: none">• Ease of use• Not having to wait in line to buy tickets• Use on multiple agencies• Ease to load/Autoload	<ul style="list-style-type: none">• Reloading and Autoload• Access to card balance• More ways to add value quickly (such as at transit stations)



Metropolitan Transportation Commission

101 Eighth Street,
Joseph P. Bort MetroCenter
Oakland, CA

Legislation Details (With Text)

File #: 15-1872 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 8/16/2016 **In control:** Clipper® Executive Board
On agenda: 8/22/2016 **Final action:**

Title:

Sponsors:

Indexes:

Code sections:

Attachments: [4 ED Report v1](#)

Date	Ver.	Action By	Action	Result
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Recommended Action:
Information

Attachments



Executive Director's Report

Clipper® Executive Board
August 22, 2016

CONTACTLESS SMART-CARD TRANSIT FARE PAYMENT SYSTEMS

August 2016

Seattle
ORCA

- 1st generation system
- 2nd generation system under development
- Equipment: Vix/ERG
- Software: Vix/ERG
- Customer service: Cubic
- Number of agencies: 9

Vancouver, BC
Compass

- 2nd generation system
- Card / Account Based
- Equipment: Cubic
- Software: Cubic
- Customer service: Cubic
- Number of agencies: 1

Portland
HOP Fastpass

- 2nd generation system under development
- Account Based
- Equipment: Init
- Software: Init
- Number of agencies: 2

San Francisco Bay Area
Clipper

- 1st generation system
- 2nd generation system under development
- Equipment: ERG (now Cubic), Cubic (BART), Cubic (SFMTA), Ventek (VTA)
- Software: Cubic
- Customer service: Cubic
- Number of agencies: 22

Salt Lake City
FAREPAY

- 1st generation system with updates
- Equipment: Vix/ERG
- Software: Vix/ERG
- Customer service: Utah Transit Authority
- Number of agencies: 1

Denver
MyRide

- Under development
- Equipment: GFI (bus), Xerox (rail)
- Software: GFI (bus), Xerox (rail)
- Customer service: Xerox
- Number of agencies: 1

Toronto ON
Presto

- 1st generation system with updates
- Equipment: Thales (Toronto area), Scheidt & Bachmann (Ottawa)
- Software: Accenture
- Number of agencies: 11

Chicago
Ventra

- 2nd generation system
- Account Based
- Equipment: Cubic
- Software: Cubic
- Customer service: Cubic
- Number of agencies: 2

Montreal QC
OPUS

- 1st generation system
- Equipment: GFI (bus), Xerox (rail)
- Software: GFI (bus), Xerox (rail)
- Number of agencies: 20

Boston
CharlieCard

- 1st generation system
- 2nd generation system under procurement
- Equipment: Scheidt & Bachmann
- Software: Scheidt & Bachmann
- Customer service: Cubic
- Number of agencies: 1

New York
MetroCard

- Under procurement

Washington, D.C.
SmarTrip

- 1st generation system
- Equipment: Cubic
- Software: Cubic
- Customer service: Cubic
- Number of agencies: 11

Philadelphia
SEPTA Key

- 2nd generation system under development
- Equipment: Xerox
- Software: Xerox
- Number of agencies: 1

Atlanta
Breeze

- 1st generation system
- Equipment: Cubic
- Software: Cubic
- Customer service: MARTA
- Number of agencies: 4

Miami
Easy

- 1st generation system
- 2nd generation system under development
- Equipment: Cubic
- Software: Cubic
- Number of agencies: 4

Houston
METRO Q card

- 1st generation system
- Equipment: Xerox
- Software: Xerox
- Customer service: Xerox
- Number of agencies: 1

San Diego
Compass

- 1st generation system
- Equipment: Cubic
- Software: Cubic
- Customer service: San Diego MTS
- Number of agencies: 2

London, UK
Oyster

- 2nd generation system
- Card / Account Based
- Equipment: Cubic
- Software: Transport for London
- Number of agencies: 1

Los Angeles
TAP

- 1st generation system with updates
- Equipment: Cubic
- Software: Cubic
- Customer service: TAP
- Number of agencies: 23