



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*

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**Monday, March 20, 2017**

**3:30 PM**

**Caltrain / SamTrans  
1250 San Carlos Ave, 2nd Floor  
San Carlos CA, 94070  
Caltrain / SamTrans Auditorium**

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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, all guests will sign in with the lobby guard and take the elevators to the second floor Auditorium. For meeting location questions, please contact Joan Catania at 650-508-6222.

#### **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.**     [17-2336](#)     Minutes of February 27, 2017 Meeting

**Action:**             Board Approval

**Attachments:**     [2a CEB Minutes Feb 2017.pdf](#)

### 3. Approval

- 3a. [17-2337](#) Contract Actions - Clipper® In-Person Customer Services
- i. Contract - Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations: Faneuil, Inc. (\$900,000)
  - ii. Contract Amendment - Customer Service Center at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$300,000)
  - iii. Funding Agreement Amendment - Customer Service Center at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000)

Contract Actions for IPCSCs at Embarcadero Station, Ferry Building, and AC Transit.

**Action:** Board Approval

**Presenter:** David Weir

**Attachments:** [3a In Person Customer Service Center Contracts.pdf](#)

- 3b. [17-2356](#) Contract Actions - Customer Research, Education and Outreach for the Clipper® Program
- i. Contract Amendment - Customer Information Services: MIG, Inc. (\$550,000)
  - ii. Contract - Distribution and Communications Planning and Support Services: Synapse Strategies (\$260,000)
  - iii. Contract - Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)

Contract Actions for Customer Research, Education, and Outreach for the Clipper® Program.

**Action:** Board Approval

**Presenter:** Kelley Jackson

**Attachments:** [3b Customer Communications Contracts.pdf](#)

### 4. Information

- 4a. [17-2338](#) Utah Transit Authority (UTA) Fare Payment Program

Update on UTA's experience with open payment and the FAREPAY smart card program.

**Action:** Information

**Presenter:** Clair Fiet, UTA

**Attachments:** [4a UTA EFC.pdf](#)

- 4b. [17-2373](#) Proposed Clipper® Contract Extension
- Update on the proposed contract extension with current Clipper® Contractor.
- Action:** Information
- Presenter:** Carol Kuester
- Attachments:** [4b Current Clipper Contract Extension.pdf](#)
- 4c. [17-2340](#) Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review
- Update on the C2 System Integrator RFP for Industry Review.
- Action:** Information
- Presenter:** Jason Weinstein
- Attachments:** [4c C2 RFP for Industry Review.pdf](#)  
[4c Handout-Comment for March 20 Clipper executive board meeting.pdf](#)

## 5. Executive Director's Report – Kuester

## 6. Public Comment / Other Business

## 7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be April 17, 2017, 3:30 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](http://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.

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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

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 17-2336      **Version:** 1      **Name:**  
**Type:** Minutes      **Status:** Consent  
**File created:** 2/14/2017      **In control:** Clipper Executive Board  
**On agenda:** 3/20/2017      **Final action:**  
**Title:** Minutes of February 27, 2017 Meeting  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [2a\\_CEB Minutes\\_Feb 2017.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Minutes of February 27, 2017 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*

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Monday, February 27, 2017

3:30 PM

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

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### 1. Roll Call / Confirm Quorum

**Present:** 7 - Rannells, Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Heminger, and Hartnett

**Absent:** 2 - Fernandez, and Crunican

Ali Hudda acted as a delegate and voting member of the Board in place of Nuria Fernandez. Actions noted below as "Fernandez" were taken by Hudda.

Carter 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 Rannells arrived during the presentation of Agenda Item 4a, Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review.

### 2. Consent Calendar

**Upon the motion by Board Member Hartnett and second by Vice Chair Reiskin, the Consent Calendar was unanimously approved by the following vote:**

**Aye:** 8 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican, Heminger and Hartnett

**Absent:** 1 - Rannells

**2a.**     [17-2256](#)     Minutes of January 23, 2016 Meeting

**Action:** Board Approval

**Attachments:** [2a\\_CEB Minutes\\_Jan 2017.pdf](#)

- 2b. [17-2264](#) Contract Change Order- FY 2015-16 Price Schedule Finalization: Cubic Transportation Systems, Inc. (\$200,000)

Finalization of the FY 2015-16 Price Schedule.

**Action:** Board Approval

**Presenter:** Edward Meng

**Attachments:** [2b\\_Annual Price Adjustment.pdf](#)

### 3. Approval

- 3a. [17-2265](#) Funds Disbursement to the Clipper® Budget

Disbursement of Inactive Unregistered Funds to the Clipper® Budget.

**Action:** Board Approval

**Presenter:** Carol Kuester

**Attachments:** [3a\\_Clipper Funds Disbursement Proposal.pdf](#)

**Upon the motion by Board Member Hartnett and second by Board Member Hursh, the Funds Disbursement to the Clipper® Budget was unanimously approved by the following vote:**

**Aye:** 8 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican, Heminger and Hartnett

**Absent:** 1 - Rannells

- 3b. [17-2257](#) Clipper® Two Year Budget and Work Plan

Clipper® Two Year Operating and Capital Budget and Work Plan.

**Action:** Board Approval

**Presenter:** Edward Meng

**Attachments:** [3b\\_Clipper 2 Year Budget and Work Plan.pdf](#)

**Upon the motion by Board Member Ramacier and second by Board Member Hartnett the Clipper® Two Year Budget and Work Plan Report was unanimously approved by the following vote:**

**Aye:** 8 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican, Heminger and Hartnett

**Absent:** 1 - Rannells

#### 4. Information

- 4a. [17-2266](#) Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review

Update on the C2 System Integrator Draft RFP for Industry Review.

Action: Information

Presenter: Jason Weinstein

Attachments: [4a C2 RFP Update.pdf](#)  
[4a Handout-article-Uber-like transit UX.pdf](#)

Steve Raney, Joint Venture Silicon Valley, spoke on this item.

#### 5. Executive Director's Report – Kuester

#### 6. Public Comment / Other Business

Clarence R. Fischer spoke on this item.

#### 7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be March 20, 2017, 3:30 p.m. in the Caltrain / SamTrans Board Room, 2nd Floor, 1250 San Carlos Avenue, San Carlos, CA.





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

**File #:** 17-2337      **Version:** 1      **Name:**

**Type:** Contract      **Status:** Committee Approval

**File created:** 2/14/2017      **In control:** Clipper Executive Board

**On agenda:** 3/20/2017      **Final action:**

**Title:** Contract Actions - Clipper® In-Person Customer Services

- i. Contract - Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations: Faneuil, Inc. (\$900,000)
- ii. Contract Amendment - Customer Service Center at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$300,000)
- iii. Funding Agreement Amendment - Customer Service Center at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000)

Contract Actions for IPCSCs at Embarcadero Station, Ferry Building, and AC Transit.

### Sponsors:

### Indexes:

### Code sections:

**Attachments:** [3a In Person Customer Service Center Contracts.pdf](#)

Date	Ver.	Action By	Action	Result
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### Subject:

Contract Actions - Clipper® In-Person Customer Services

- i. Contract - Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations: Faneuil, Inc. (\$900,000)
- ii. Contract Amendment - Customer Service Center at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$300,000)
- iii. Funding Agreement Amendment - Customer Service Center at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000)

Contract Actions for IPCSCs at Embarcadero Station, Ferry Building, and AC Transit.

### Presenter:

David Weir

### Recommended Action:

Board Approval

### Attachments



## Agenda Item 3a

Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

TO: Clipper® Executive Board

DATE: March 13, 2017

FR: Carol Kuester

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

- i. Contract – Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations: Faneuil, Inc. (\$900,000)
- ii. Contract Amendment – Customer Service Center at San Francisco Ferry Building Operations: Nematode Holdings, LLC (\$300,000)
- iii. Funding Agreement Amendment – Customer Service Center at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000)

### **Background and Overall Strategy**

The Clipper® program currently offers in-person Clipper® customer service centers (IPCSC) at two downtown San Francisco locations and Alameda-Contra Costa Transit District's (AC Transit) Oakland headquarters. These IPCSC locations, which are adjacent to rail, bus and ferry hubs, provide customers with an immediate option for obtaining adult, youth, senior and replacement cards, in addition to answering general questions about the program and enabling access to printed forms and brochures.

Staff recommends continued operation of the three Clipper® IPCSCs that MTC financially supports. The IPCSC locations, individually and collectively, provide a channel of service utilized and relied upon by a significant number of Clipper® customers.

Without the Clipper® IPCSCs, serving customers in-person would fall to transit agency ticket offices and customer service centers or the Clipper® retailer network. Customers wanting to obtain new senior or youth cards in person would be able to go only to transit agency ticket offices and customer service centers. Additionally, the only option for getting a replacement for a lost or stolen card with a transferred balance would be by mail. The two IPCSCs in San Francisco have also recently taken on the added responsibility of selling BART High Value Discount, senior and youth/disabled magnetic stripe tickets.

### **Overview of IPCSC at Embarcadero**

MTC has operated a Clipper® IPCSC at the Embarcadero BART/Muni station since 2011. This location is by far the most heavily patronized Clipper® IPCSC because of its visibility and ease of access by transit. The contract with the current supplier expires June 30, 2017. On November 21, 2016, MTC issued a Request for Proposal (RFP) for operation of the Embarcadero IPCSC.

### **Overview of IPCSC at the Ferry Building**

Nematode Holdings, LLC provides Clipper® customer service at the Bay Crossings store located in the San Francisco Ferry Building. While only a few blocks from the IPCSC at the Embarcadero station, this store is uniquely positioned as the only retail outlet in the Ferry Building aimed at providing transportation information to the public. MTC's contract with Nematode also includes responsibility for operating and maintaining the ferry departure flap sign that hangs prominently in the Ferry Building's main lobby.

With over 95% of Golden Gate Ferry customers and more than half of San Francisco Bay Ferry customers using the Clipper® system to pay their fares, staff believes the Bay Crossings store will continue to be an important location for new and existing Clipper® customers during Fiscal Year 2017-18.

### **Overview of IPCSC at AC Transit**

AC Transit began offering in-person Clipper® customer services in the East Bay in May 2012. AC Transit's ground floor customer service center offers a spacious location for providing new and replacement cards, as well as displaying Clipper® forms and brochures. This location, midway between BART's 12<sup>th</sup> Street and 19<sup>th</sup> Street stations in downtown Oakland and within walking distance of several AC Transit bus routes, features prominent Clipper® signage on the front columns and windows.

### **Contract Actions**

Staff recommends that the Executive Board approve the following contract actions:

**i. Contract – Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations: Faneuil, Inc. (\$900,000)**

MTC received four proposals in response to its RFP and requested Best and Final Offers (BAFOs) from three firms: the incumbent Nematode Holdings; Faneuil, and WSP/Parsons Brinkerhoff. The evaluation panel determined the Faneuil BAFO to be most advantageous based on the evaluation criteria in the RFP, in particular cost effectiveness. Faneuil's cost proposal was 30% lower than the closest competitor over the initial contract term. The proposed contract would be for 2 years of operation commencing July 1, 2017, plus a pre-operations period of transition.

**ii. Contract Amendment – Customer Service Center at San Francisco Ferry Building Operations: Nematode Holdings, LLC (Nematode) (\$300,000)**

In January 2011, MTC entered into a sole source contract with Nematode to begin offering expanded Clipper® customer services, including issuance of new and replacement cards, based on the unique position of this store as the only vendor in the San Francisco Ferry Building selling transit tickets to ferry commuters and tourists. 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. The amendment before you today will fund these ongoing activities through June 30, 2018 on a sole-source basis.

**iii. Funding Agreement Amendment – Customer Service Center at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000)**

In April 2012, MTC executed a funding agreement with AC Transit for the provision of Clipper® customer services at AC Transit's headquarters in Oakland. AC Transit's multilingual staff issue new and replacement cards, distribute Clipper® brochures, and are trained to provide information about using Clipper® on all participating transit services. The amendment before you today will fund these ongoing activities through June 30, 2018.

**Recommendation**

Staff is recommending approval to enter into a contract with Faneuil, Inc. in an amount not to exceed \$900,000, a contract amendment with Nematode Holdings, LLC, in an amount not to exceed \$300,000, and a funding agreement amendment with AC Transit in an amount not to exceed \$250,000, to provide in-person Clipper® customer services as described above and in the attached Board Approval forms.

  
\_\_\_\_\_  
Carol Kuester

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Contract

Contractor:	Faneuil, Inc. Hampton, VA
Work Project Title:	In-Person Customer Service Center at Embarcadero San Francisco Bay Area Rapid Transit (BART) Station Operations
Purpose of Amendment:	Provide Clipper® in-person customer service, such as issuance of new and replacement cards
Brief Scope of Work:	Contractor shall provide trained staff to support a range of Clipper® customer services
Project Cost Not to Exceed:	\$900,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget
Motion:	That a contract with Faneuil, for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.

Executive Board:

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Denis Mulligan, Chair

Approved:

Date: March 20, 2017

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Contract Amendment

Contractor:	Nematode Holdings, LLC San Francisco, CA
Project Title:	In-Person Customer Service Center/Bay Crossings at San Francisco Ferry Building Operations
Purpose of Contract:	Provide Clipper® in-person customer service, such as issuance of new and replacement cards; 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:	\$300,000 (this amendment) Total Contract value including amendments before this amendment = \$1,476,366 Total contract amount with this amendment = \$1,776,366
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.
Motion:	That a contract amendment with Nematode Holdings, for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.
Executive Board:	<hr/> Denis Mulligan, Chair
Approved:	Date: March 20, 2017

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Funding Agreement Amendment

Contractor:	Alameda-Contra Costa Transit District (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:	<p>\$250,000 (this amendment)</p> <p>Total Funding Agreement value including amendments before this amendment = \$1,320,600</p> <p>Total Funding Agreement amount with this amendment = \$1,570,600</p>
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.
Motion:	That a funding agreement amendment with AC Transit for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.

Executive Board:

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Denis Mulligan, Chair

Approved:

Date: March 20, 2017



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

**File #:** 17-2356      **Version:** 1      **Name:**  
**Type:** Contract      **Status:** Committee Approval  
**File created:** 2/24/2017      **In control:** Clipper Executive Board  
**On agenda:** 3/20/2017      **Final action:**  
**Title:** Contract Actions - Customer Research, Education and Outreach for the Clipper® Program  
i. Contract Amendment - Customer Information Services: MIG, Inc. (\$550,000)  
ii. Contract - Distribution and Communications Planning and Support Services: Synapse Strategies (\$260,000)  
iii. Contract - Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)

Contract Actions for Customer Research, Education, and Outreach for the Clipper® Program.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [3b Customer Communications Contracts.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**

Contract Actions - Customer Research, Education and Outreach for the Clipper® Program  
i. Contract Amendment - Customer Information Services: MIG, Inc. (\$550,000)  
ii. Contract - Distribution and Communications Planning and Support Services: Synapse Strategies (\$260,000)  
iii. Contract - Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)

Contract Actions for Customer Research, Education, and Outreach for the Clipper® Program.

**Presenter:**

Kelley Jackson

**Recommended Action:**

Board Approval

**Attachments**





## Agenda Item 3b

Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

TO: Clipper® Executive Board

DATE: March 13, 2017

FR: Carol Kuester

RE: Contract Actions – Customer Research, Education and Outreach for the Clipper® Program

- i. Contract Amendment – Customer Information Services: MIG, Inc. (\$550,000)
- ii. Contract – Distribution and Communications Planning and Support Services: Synapse Strategies (\$260,000)
- iii. Contract – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)

### Background and Overall Strategy

MTC engages contractors to assist with the strategic planning and implementation of customer research, education and outreach initiatives intended to benefit current and potential Clipper® customers. The Clipper® customer communications program is built around four core tasks: supporting system expansion; building customer awareness of system changes; improving the customer experience; and targeting cash-paying transit riders in order to increase adoption.

The work plan for the customer research and communications program is primarily driven by work completed by Cubic under the Clipper® Contract, including the expansion of Clipper® to new operators, integration with transit operator equipment, operator-initiated fare policy changes, and backend operational changes that affect the customer experience. As part of MTC's ongoing mandate to provide Clipper® information and outreach to Title VI-protected populations, MTC supports one or more initiatives each fiscal year targeting this segment of transit riders. MTC also strives to support transit operator fare policy changes that are implemented outside of the Clipper® system, but create demand for Clipper® cards and information. For example, in past years MTC has assisted VTA with the elimination of its paper day pass and SFMTA with the introduction of a discount for customers who pay with Clipper® instead of cash. Transit operators regularly submit requests to MTC to assist with their Clipper® education efforts during a bi-monthly call on which all the operators are invited to participate or by submitting requests to their respective MTC staff liaisons.

During FY 2017-18, MTC will invest in ongoing C2 public engagement efforts as directed by this Board. Current initiatives include soliciting feedback on the Draft Request for Proposal for System Integrator for Industry Review, maintaining [futureofclipper.com](http://futureofclipper.com), documenting public comments, and conducting focus groups of transit riders. The FY 2017-18 work plan will include Clipper®'s biennial customer satisfaction survey, as well as a survey of cash-paying transit riders. We anticipate these research efforts will help us identify opportunities to improve the current system and inform the next-generation Clipper® system design process.

During the course of FY 2017-18, MTC will provide ongoing information about customer research and education activities in the Clipper® Program Update Report, which is distributed monthly to transit operator staff.

Attachment A provides an overview of the draft Clipper® customer education work plan for FY 2017-18 along with a summary of projects completed during FY 2015-16 and FY 2016-17.

### **Contract Actions**

Staff recommends that the Executive Board approve the following contract actions:

**a) Contract Amendment – Customer Information Services: MIG, Inc. (MIG) (\$550,000)**

MIG is prequalified to enter into contracts with MTC to perform work in the areas of strategic planning, creative design and online services. The original contract was entered into in July, 2016 for \$550,000.

The scope of work for this contract amendment includes support for research and public engagement for the development of the next-generation Clipper® system. MIG will continue to assist with the implementation of customer education initiatives related to the launch of Clipper® on Sonoma Marin Area Rail Transit (SMART). MIG also will support ongoing operational changes, such as fare policy changes and Clipper® system improvements, by updating the Clipper® website and developing materials as needed.

**b) Contract – Distribution and Communications Planning and Support Services: Synapse Strategies (Synapse) (\$260,000)**

Synapse is prequalified as part of MTC's Clipper® Electronic Payment Implementation and Operations bench procurement. Tasks under this contract include operational reporting and strategic planning and management of the public engagement process for the next-generation Clipper® system, as well as general education initiatives and research.

**iii. Contract – Clipper® Customer Education/Outreach Services: Caribou Public Relations (Caribou) (\$200,000)**

Caribou is prequalified as part of MTC's Clipper® Electronic Payment Implementation and Operations bench procurement. Under the proposed contract, Caribou will provide Clipper® outreach services to transit riders, including Title VI-protected customers.

### **Recommendation**

Staff is recommending approval of three contracts or contract amendments with MIG, Inc. (\$550,000), Synapse Strategies (\$260,000), and Caribou Public Relations (\$200,000). MTC will return to the Executive Board for authorization of any additional contracts or contract amendments needed to support the customer research, education and outreach program that exceed the MTC Executive Director's signature authority.

  
\_\_\_\_\_  
Carol Kuester

### **Attachment:**

- Attachment A: Clipper® Customer Education Program Activities (FY 2015-16 through FY 2017-18)
- Attachment B: Clipper® Customer Research, Education, and Outreach Program

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Contract Amendment

Contractor: MIG, Inc.  
Berkeley, CA

Work Project Title: Public Awareness and Customer Education Services

Purpose of Amendment: Continue to provide assistance with Clipper® research and customer education efforts

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 = \$550,000  
Total contract amount with this amendment = \$1,100,000

Funding Source: Regional Measure 2 Marketing and Operations, STA, STP

Fiscal Impact: Funds dependent on the approval of the FY 2017-18 MTC agency budget

Motion: That a contract amendment with MIG, Inc., for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.

Executive Board:

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Denis Mulligan, Chair

Approved:

Date: March 20, 2017

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Contract

Contractor:	Synapse Strategies Oakland, CA
Project Title:	Distribution and Communications Planning and Support Services
Purpose of Contract:	Provide strategic planning and oversight for customer education and communications functions
Brief Scope of Work:	Oversee in-person customer education/outreach services; planning and support services related to Clipper® marketing and communications initiatives
Project Cost Not to Exceed:	\$260,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.
Motion:	That a contract with Synapse Strategies, for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.

Executive Board:

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Denis Mulligan, Chair

Approved:

Date: March 20, 2017

## REQUEST FOR CLIPPER® EXECUTIVE BOARD APPROVAL

### Summary of Proposed Contract

Contractor:	Caribou Public Relations San Francisco, 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:	\$200,000
Funding Source:	Regional Measure 2 Marketing and Operations, STA, STP
Fiscal Impact:	Funds dependent on the approval of the FY 2017-18 MTC agency budget.
Motion:	That a contract with Caribou Public Relations for the purposes described herein and in the Executive Director's memorandum dated March 13, 2017, is hereby approved by the Clipper® Executive Board, subject to adoption of the FY 2017-18 MTC agency budget.
Executive Board:	<hr/> Denis Mulligan, Chair
Approved:	Date: March 20, 2017

**Attachment A**  
**Clipper® Customer Education Program Activities (FY 2015-16 through FY 2017-18)**

<b>Fiscal Year</b>	<b>Activity</b>	<b>Primary Audience</b>	<b>Secondary Audience</b>	<b>Tactics</b>
2017-18 (draft)	SMART Launch (promotional fare)	<ul style="list-style-type: none"> <li>• SMART</li> </ul>	<ul style="list-style-type: none"> <li>• Golden Gate Transit/Ferry</li> <li>• Marin Transit</li> <li>• Petaluma Transit</li> <li>• Santa Rosa CityBus</li> <li>• Sonoma County Transit</li> </ul>	<ul style="list-style-type: none"> <li>• Operator microsite</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Content and programming updates to clippercard.com</li> <li>• Advertising</li> <li>• Outreach events</li> <li>• Card sleeve</li> <li>• Take-one with retailer list</li> <li>• Customer service training</li> </ul>
	C2 Public Engagement	<ul style="list-style-type: none"> <li>• Current and potential Clipper® customers</li> </ul>	<ul style="list-style-type: none"> <li>• Stakeholders, including community-based organizations (CBOs), employers</li> </ul>	<ul style="list-style-type: none"> <li>• Content and programming updates to futureofclipper.com</li> <li>• Stakeholder interviews</li> <li>• Focus groups</li> <li>• Discussion guide for operator presentations</li> </ul>
	Cash-customer Survey	<ul style="list-style-type: none"> <li>• Regional</li> </ul>		<ul style="list-style-type: none"> <li>• Intercept survey and report</li> </ul>
	Biennial Customer Satisfaction Survey	<ul style="list-style-type: none"> <li>• Regional</li> </ul>		<ul style="list-style-type: none"> <li>• Intercept survey and report</li> </ul>
	Card Sales at BART Ticket Machines	<ul style="list-style-type: none"> <li>• BART</li> </ul>	<ul style="list-style-type: none"> <li>• AC Transit</li> <li>• County Connection</li> <li>• Tri Delta Transit</li> <li>• Union City Transit</li> <li>• WestCAT</li> <li>• Wheels</li> </ul>	<ul style="list-style-type: none"> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Content and programming updates to clippercard.com</li> <li>• Customer service training</li> </ul>
	Clipper® is Everywhere Campaign	<ul style="list-style-type: none"> <li>• Regional</li> </ul>		<ul style="list-style-type: none"> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Advertising</li> <li>• Car cards</li> <li>• Card sleeve</li> <li>• Outreach events</li> </ul>
	Website Improvements	<ul style="list-style-type: none"> <li>• Dumbarton Express</li> <li>• Clipper® Direct participants</li> <li>• Tourists</li> </ul>		<ul style="list-style-type: none"> <li>• Dumbarton Express microsite</li> <li>• Clipper® Direct website</li> <li>• Tourist-focused page</li> </ul>

Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
2017-18 (continued)	Communications Material Archive	<ul style="list-style-type: none"> <li>Regional</li> </ul>		<ul style="list-style-type: none"> <li>Development of archive for creative files and messaging for transit operator use</li> </ul>
	Miscellaneous regional events	<ul style="list-style-type: none"> <li>BART</li> <li>Transbay Transit Center</li> </ul>		<ul style="list-style-type: none"> <li>BART National Night Out outreach events</li> <li>Outreach events for BART station and Transbay Transit Center openings</li> <li>Content and programming updates to clippercard.com</li> <li>License agreements updates</li> </ul>
	Miscellaneous fare policy and service changes	<ul style="list-style-type: none"> <li>TBD</li> </ul>		<ul style="list-style-type: none"> <li>Content and programming updates to clippercard.com</li> <li>Social media announcements</li> <li>Website announcements</li> <li>Emails to targeted registered customers</li> <li>Clipper® Service Bureau coordination</li> </ul>
2016-17	SFMTA Fare Differential	<ul style="list-style-type: none"> <li>SFMTA</li> </ul>	<ul style="list-style-type: none"> <li>BART</li> <li>SamTrans</li> </ul>	<ul style="list-style-type: none"> <li>Social media announcements</li> <li>Website announcements</li> <li>Content and programming updates to clippercard.com</li> <li>Streamlined website landing page</li> <li>Advertising: digital banner ads, 30-second animated video</li> <li>Car cards</li> <li>Retailer signage</li> <li>Ticket machine decals</li> <li>Card sleeve</li> <li>Take-one with retailer list</li> <li>Outreach events (62)</li> </ul>
	C2 Public Engagement	<ul style="list-style-type: none"> <li>Current and potential Clipper® customers</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholders, including community-based organizations (CBOs), employers</li> </ul>	<ul style="list-style-type: none"> <li>Social media announcements</li> <li>Website announcements</li> <li>Content and programming updates to futureofclipper.com</li> <li>Summary of Draft Request for Proposal for System Integrator for Industry Review</li> <li>Stakeholder interviews</li> <li>Focus groups (4)</li> <li>Opt-in online survey</li> <li>30-second video</li> <li>Car cards</li> <li>Take-one</li> <li>Discussion guide for operator presentations</li> </ul>

<b>Fiscal Year</b>	<b>Activity</b>	<b>Primary Audience</b>	<b>Secondary Audience</b>	<b>Tactics</b>
2016-17 (continued)	Relocation of Clipper® Customer Service Center at Embarcadero BART/Muni Metro Station	<ul style="list-style-type: none"> <li>• Current and potential Clipper® customers</li> </ul>		<ul style="list-style-type: none"> <li>• Signage for exterior walls, windows and stanchions</li> <li>• Social media announcements</li> </ul>
	Union City Transit Launch	<ul style="list-style-type: none"> <li>• Union City Transit</li> </ul>	<ul style="list-style-type: none"> <li>• AC Transit</li> <li>• BART</li> </ul>	<ul style="list-style-type: none"> <li>• Operator microsite</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Press release</li> <li>• Content and programming updates to clippercard.com</li> <li>• New brochure</li> <li>• Revisions to existing brochures</li> <li>• Ticket office decals</li> <li>• Vehicle decals</li> <li>• Advertising</li> <li>• Outreach events (TBD)</li> <li>• Card sleeve</li> <li>• Customer service training</li> </ul>
	SMART Launch (free period)	<ul style="list-style-type: none"> <li>• SMART</li> </ul>	<ul style="list-style-type: none"> <li>• Golden Gate Transit/Ferry</li> <li>• Marin Transit</li> <li>• Petaluma Transit</li> <li>• Santa Rosa CityBus</li> <li>• Sonoma County Transit</li> </ul>	<ul style="list-style-type: none"> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Press release</li> <li>• Content and programming updates to clippercard.com</li> <li>• New brochure</li> <li>• Revisions to existing brochures</li> <li>• Ticket office decals</li> <li>• Card sleeve</li> <li>• Station signage</li> <li>• Outreach events (TBD)</li> <li>• Customer service training</li> </ul>
	Off-Peak Rider Campaign	<ul style="list-style-type: none"> <li>• Potential Clipper® customers</li> </ul>	<ul style="list-style-type: none"> <li>• TBD</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Outreach events (TBD)</li> </ul>
	Ford GoBike Launch	<ul style="list-style-type: none"> <li>• Current and potential Clipper® customers</li> </ul>		<ul style="list-style-type: none"> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Press release</li> <li>• Content and programming updates to clippercard.com</li> </ul>
	Website improvements	<ul style="list-style-type: none"> <li>• Current and potential Clipper® customers</li> </ul>		<ul style="list-style-type: none"> <li>• Refresh and standardization of microsite content</li> <li>• Updated value availability language</li> <li>• Streamlined home page menu options</li> <li>• New transit operator logos as needed</li> <li>• New header and footer</li> </ul>



Fiscal Year	Activity	Primary Audience	Secondary Audience	Tactics
2016-17 (continued)	Miscellaneous regional events	<ul style="list-style-type: none"> <li>• BART</li> <li>• Current and potential Clipper® customers</li> </ul>		<ul style="list-style-type: none"> <li>• BART National Night Out outreach events (6)</li> <li>• Privacy policy updates</li> <li>• Customer service training for The Hub</li> </ul>
	Miscellaneous fare policy and service changes	<ul style="list-style-type: none"> <li>• AC Transit</li> <li>• Golden Gate Transit/Ferry</li> <li>• San Francisco Bay Ferry</li> <li>• SFMTA</li> </ul>		<ul style="list-style-type: none"> <li>• Content and programming updates to clippercard.com</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Emails to targeted registered customers</li> <li>• Signage for San Francisco Bay Ferry</li> <li>• Clipper® Service Bureau coordination</li> </ul>
2015-16	East Bay Bus Services Launch	<ul style="list-style-type: none"> <li>• County Connection</li> <li>• Tri Delta Transit</li> <li>• WestCAT</li> <li>• Wheels</li> </ul>	<ul style="list-style-type: none"> <li>• BART</li> <li>• AC Transit</li> </ul>	<ul style="list-style-type: none"> <li>• New brochure</li> <li>• Operator microsites (4)</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Press release</li> <li>• Content and programming updates to clippercard.com</li> <li>• Revisions to existing brochures</li> <li>• Advertising: on-vehicle, connecting BART stations, transit shelters, digital and print (including Chinese and Spanish-language media), local radio</li> <li>• Ticket office decals</li> <li>• Vehicle decals</li> <li>• Outreach events (33)</li> <li>• Customer service trainings (8)</li> </ul>
	Sonoma/101 Corridor Launch	<ul style="list-style-type: none"> <li>• Petaluma Transit</li> <li>• Santa Rosa CityBus</li> <li>• Sonoma County Transit</li> </ul>	<ul style="list-style-type: none"> <li>• Golden Gate Transit</li> </ul>	<ul style="list-style-type: none"> <li>• New brochure</li> <li>• Operator microsites (3)</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Press release</li> <li>• Content and programming updates to clippercard.com</li> <li>• Updates to existing brochures</li> <li>• Advertising: on-vehicle, digital and print (including Spanish-language media), local radio</li> <li>• Ticket office decals</li> <li>• Vehicle decals</li> <li>• Outreach events (20)</li> <li>• Customer service trainings (4)</li> </ul>
	VTA Paper Day Pass Elimination	<ul style="list-style-type: none"> <li>• VTA</li> </ul>		<ul style="list-style-type: none"> <li>• Content updates to clippercard.com</li> <li>• Updates to existing brochures</li> <li>• Take-one with retailer information</li> <li>• Outreach events (25)</li> </ul>

<b>Fiscal Year</b>	<b>Activity</b>	<b>Primary Audience</b>	<b>Secondary Audience</b>	<b>Tactics</b>
2015-16 (continued)	WestCAT Lynx 31-Day Pass	<ul style="list-style-type: none"> <li>• WestCAT</li> </ul>		<ul style="list-style-type: none"> <li>• Social media</li> <li>• Outreach events (6)</li> </ul>
	Cash Customer Campaign	<ul style="list-style-type: none"> <li>• AC Transit</li> <li>• SamTrans</li> </ul>	<ul style="list-style-type: none"> <li>• BART</li> <li>• Caltrain</li> <li>• SFMTA</li> <li>• VTA</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising: on-vehicle, transit shelter, digital, mobile and Comcast banner ads during broadcasts of A's and Giants games (3 languages)</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Outreach events</li> </ul>
	Miscellaneous regional events	<ul style="list-style-type: none"> <li>• BART</li> <li>• SFMTA</li> </ul>	<ul style="list-style-type: none"> <li>• AC Transit</li> <li>• Caltrain</li> <li>• Golden Gate Transit/Ferry</li> <li>• SamTrans</li> <li>• SF Bay Ferry</li> </ul>	<ul style="list-style-type: none"> <li>• BART National Night Out outreach events (6)</li> <li>• SFSU Welcome Days outreach event</li> <li>• BART Blue Sky Festival outreach event</li> <li>• Super Bowl commemorative card promotion via website updates, social media announcements and retail signage</li> </ul>
	Miscellaneous fare policy and service changes	<ul style="list-style-type: none"> <li>• BART</li> <li>• Caltrain</li> <li>• Golden Gate Transit/Ferry</li> <li>• SamTrans</li> <li>• SF Bay Ferry</li> <li>• VINE</li> <li>• VTA</li> </ul>		<ul style="list-style-type: none"> <li>• Content and programming updates to clippercard.com</li> <li>• Social media announcements</li> <li>• Website announcements</li> <li>• Retailer signage (multilingual)</li> <li>• Revisions to existing brochures</li> <li>• Emails to targeted registered customers</li> <li>• Clipper® Service Bureau coordination</li> </ul>



# Customer Research, Education and Outreach for the Clipper® Program

March 20, 2017

Clipper® Executive Board

Agenda Item 3b  
Attachment B

# Contract Actions for Approval

- Synapse Strategies (\$260k)
  - Strategic planning and management of the communications program, including the C2 public engagement process
- MIG, Inc. (\$550k)
  - Development of digital and print materials
  - Management of social media and [futureofclipper.com](http://futureofclipper.com)
  - Oversight of customer research subcontractors
- Caribou Public Relations (\$200k)
  - Outreach to transit riders, including Title VI-protected customers

# Development of Annual Work Plan

- Support for work completed by the Clipper® Contractor
  - System expansion and integration
  - Fare policy changes
- C2 public engagement
- Transit operator requests for assistance
  - Clipper® discounts and elimination of paper products
  - Informational signage
- Focus on Title VI-protected populations

# Fiscal Year 2016-17 Activities

## Makatipid sa Clipper!

- Magdagdag ng halaga ng cash para sa diskwento sa mga tulugan sikay
- Magdagdag ng mga passes para sa kotipin sa madalas na sumasakay

Kumuha ng Clipper card at magdagdag ng halaga sa:

- Wagwagons
- Whole Foods Market
- Bay Area Food Bank
- Muni ticket machines
- clippercard.com

## Muni Fare Differential Campaign

## Save with Clipper!

- Add cash value for single-ride discounts
- Add passes for frequent rider savings

## Get a Clipper card.

Add value here!

- Get discounts on Muni
- Reload cash value
- Use it on all Bay Area

¡Ahorre dinero cuando usas Clipper!  
 Recarga el valor en efectivo en tu tarjeta Clipper y úsala en todos los servicios de transporte público de la zona de la Bahía.  
 Tải tiền lên thẻ clipper và dùng Clipper để đi lại trên các phương tiện giao thông công cộng trong vùng San Francisco Bay Area.

clippercard.com | 877.878.8883

## GET CLIPPER AND SAVE ON MUNI

Get Clipper and Save on Muni

Bay Area Clipper

Subscribe 77

1,095 views

## Pay with Clipper!

Use it on this bus and throughout the Bay Area

Clipper on Clipper

How to use Clipper

Clipper on Clipper

## Union City Transit Launch

Clipper's here!

Get a card and add value now

Using Clipper on Union City Transit

Fares and passes

FAQ

Using Clipper on Union City Transit

Clipper automatically figures out the cost of your ride, including all discounts and transfers. See **Fares and passes** for more information on the types of value available.

If you are paying for your ride with cash value or a discounted transfer from AC Transit, BART or Dumbarton Express, you must have a minimum balance of 25 cents on your Clipper card.

To use Clipper on Union City Transit, locate the Clipper card reader on the bus. Tag your card by holding it flat against the Clipper logo on the reader, and wait for the beep and green

## CLIPPER

Home About Use Get Login

Order a Clipper Card

Get Clipper discounts

Add value online

Register a card

Set up Autoload

Find retail locations

Apply transit benefits

Park with Clipper

Clipper FAQ

Customer support

Ride SMART!

The North Bay's new train is coming. Get ready to ride with Clipper!

Get your card and add cash value today.

- New microsite – desktop/mobile
- Updates to 28 web pages
- Updates to 23 brochures in 3 languages

## SMART Launch Planning

## Website Improvements

What would you like to add?

Passes Cash Parking

Clipper deducts the exact fare for each trip as you travel.

### Cash Value

Cash value can only be used for transit.

### Value Availability

Value you order online will not be available immediately. You must tag your card to pick up the value.

- If you place your order by 6 p.m., you can use your value in the next 1 to 2 days.
- If you are picking up your value on a bus or vehicle, please allow up to 5 days.
- If you are setting up Autoload with a bank account, please allow an additional 10 days for value to first be available.

If you need value on your card immediately, you will need to go to an in-person location.

Find an in-person location Continue adding value online

## C2 Public Engagement

### The Future of Clipper

The next-generation Clipper system is on the horizon!

### Summary of Draft RFP

The Next-Generation Clipper System is on the horizon!

Customers can:

- Use Clipper on all transit agencies
- Use Clipper on all transit agencies
- Use Clipper on all transit agencies

### 徵求建議書 (RFP) 草案摘要

### Tóm lược dự thảo RFP



## SF Bay Ferry Pole Wraps

# Draft Work Plan for FY 2017-18

- SMART launch
  - Clipper® is everywhere!
- C2 public engagement
  - Cash-customer survey
- Biennial customer satisfaction survey
- Card sales at BART ticket machines
- Website improvements
  - Incorporate research findings
  - Tourist-focused information
- Communications material archive



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 17-2338      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 2/14/2017      **In control:** Clipper Executive Board  
**On agenda:** 3/20/2017      **Final action:**  
**Title:** Utah Transit Authority (UTA) Fare Payment Program  
Update on UTA's experience with open payment and the FAREPAY smart card program.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4a UTA EFC.pdf](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

**Subject:**

Utah Transit Authority (UTA) Fare Payment Program

Update on UTA's experience with open payment and the FAREPAY smart card program.

**Presenter:**

Clair Fiet, UTA

**Recommended Action:**

Information

**Attachments**





Agenda Item 4a

Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

TO: Clipper® Executive Board

DATE: March 13, 2017

FR: Carol Kuester

RE: Utah Transit Authority (UTA) Fare Payment Program

**Background**

The Utah Transit Authority (UTA) is the public transportation provider throughout the Wasatch Front of Utah, which includes the greater Salt Lake City metropolitan area. UTA launched an Electronic Fare Collection system (EFC) in 2009 which allows for payment of transit fares with contactless credit/debit cards, student ID cards, electronic passes, and prepaid cards. UTA received the 2009 American Public Transportation Association (APTA) Innovation Award for the EFC system.

UTA offers a prepaid fare card called FAREPAY that can be used to pay fares electronically on any UTA operated transportation, including buses, light rail, and commuter rail. The FAREPAY card has a \$3 issuance fee and can be loaded with up to \$500 of value.

To share their experience and lessons learned with this Board, we have invited Clair Fiet, the Chief Information Officer (CIO) for UTA, here today to present UTA's experience with their fare payment program, and in particular to highlight their experience with an account-based system and open payments.

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

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Carol Kuester

**Attachment:**

- Attachment A: Electronic Fare Collection: The UTA Experience
- Attachment B: Riding the rails: Chicago's route to a cardless transit payment system



# Electronic Fare Collection The UTA Experience

March 20, 2017

Clipper® Executive Board  
Agenda Item 4a  
Attachment A



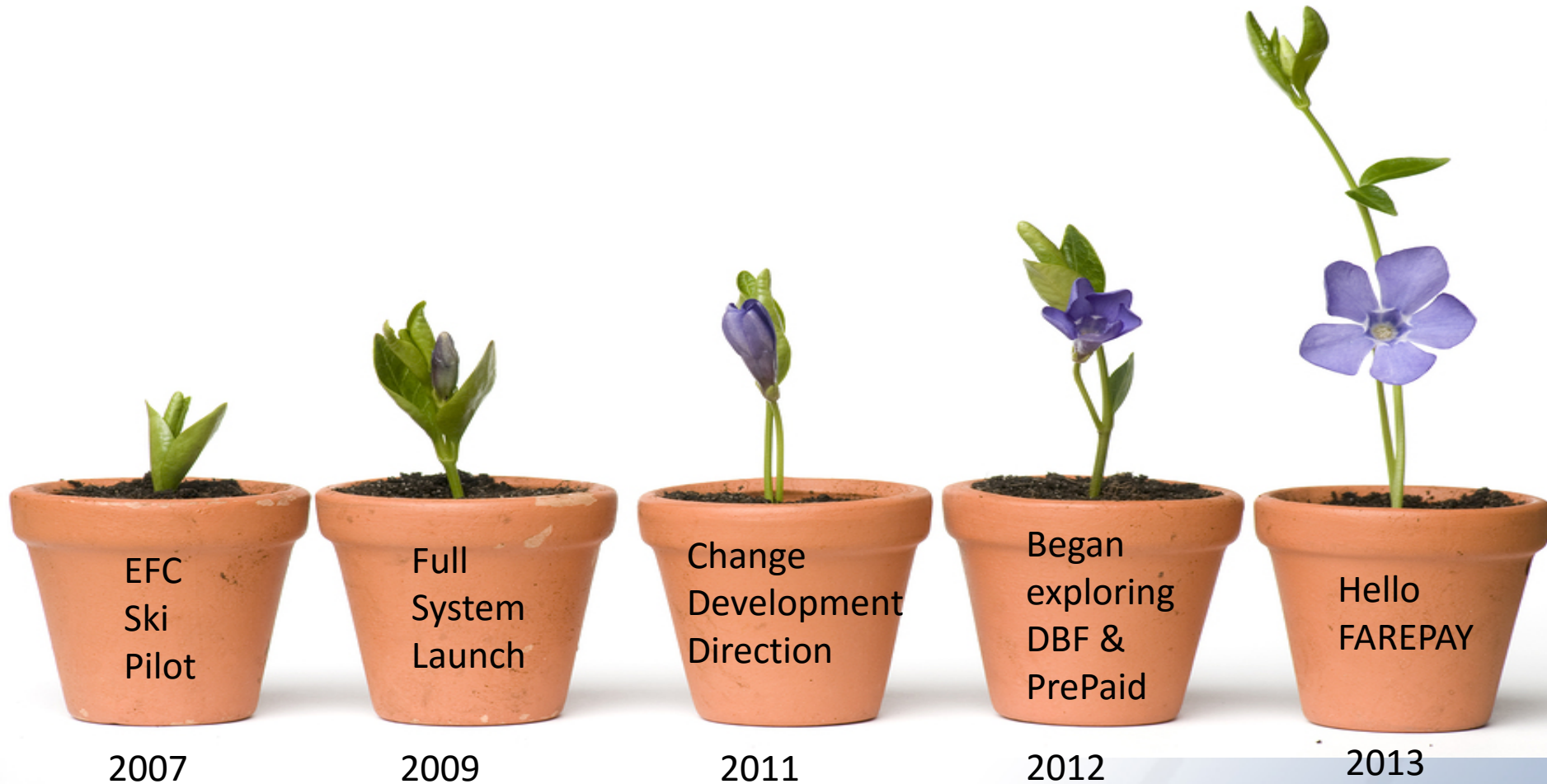
- 520 regular buses, 100% accessible
- 40 ski-service buses
- 117 para-transit vehicles
- TRAX light rail line has 114 vehicles on four lines with 41 stations over 35 miles
- Commuter rail service has 18 locomotives and 53 cars with 16 stations operating over 89 miles
- 45.5 million boardings (2016)

# The Appeal of Contactless Credit and Debit (but does it deliver?)

- Others issue payment media
- Automatic interagency interoperability
- Customer service with issuers
- Security standard
- Architecture provides flexibility in product development
- Robustness of open payments ecosystem
- Commoditization of devices
- Potential for pathway to elimination of cash
- Cost
- Co-promotion



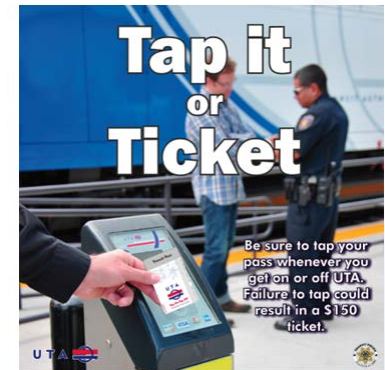
# EFC Development Progress





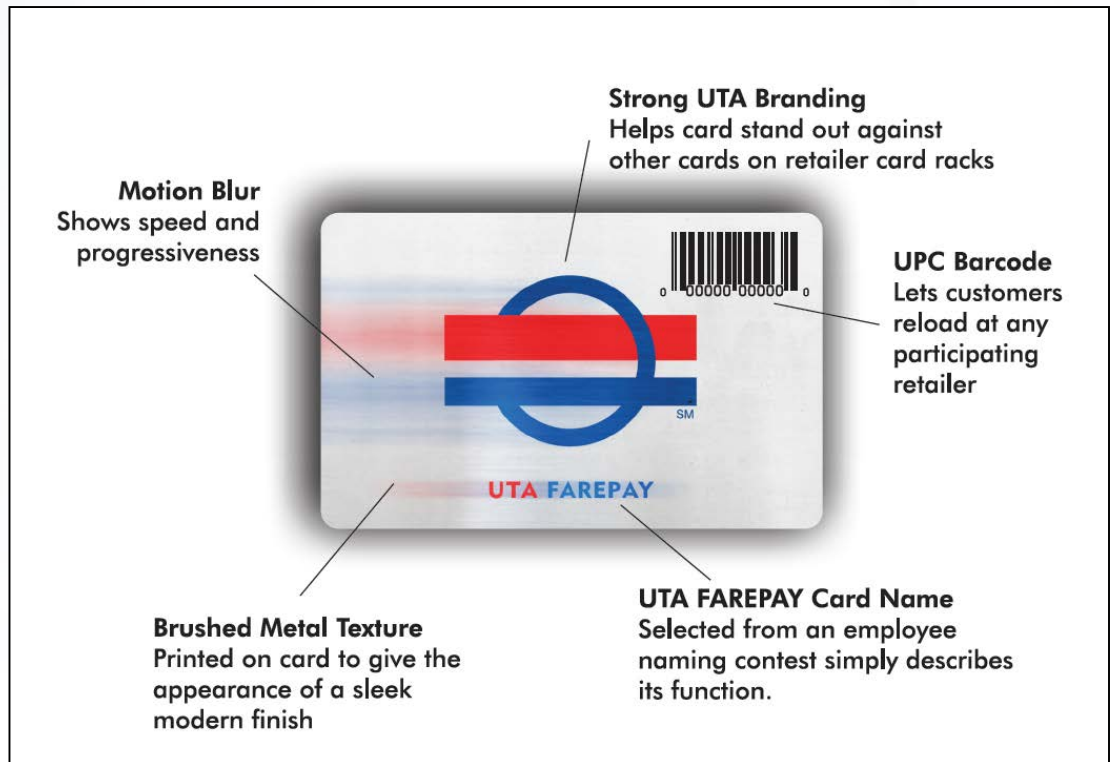
# Since 1/1/2009

- Contactless card readers on all buses and at all rail platforms
- 98% red-light accuracy -> EFC hard fare enforcement on bus
- Inspection solution -> hard enforcement of taps on rail
- Most EFC cards are 3<sup>rd</sup>-party issued cards (EcoPass, EdPass, SkiPass)
- We support open payments – but are still waiting to realize the benefits
- Ridership data is available



# UTA FAREPAY Card

- Prepaid
- Closed loop
- Reloadable
- Contactless chip
- Merchant retail network
- Online



# Flexibility is the Future

## Bank Issued Contactless Cards

- AmEx, VISA, MasterCard, Discover (if they materialize)

## Third Party Issued Cards

- Institution Cards
- Agency Cards



## Smartphones

- ApplePay, SamsungPay
- Mobile Ticketing – may be the best option

## Pre-Paid Cards

- Agency Branded – this solves a specific UTA issue



# Lessons Learned

- Know your objectives – stick to them!
- Open Payment easy – Transit not so much
- Open Payments – big promise, not realized yet
- Partnering requires VERY stringent process
- Agency needs to understand risk model
- Consider your patrons' sensitivities
- Give patrons time to adapt before moving on
- Savings don't come until fare type is removed



**JUST ONE THING**

# Questions?



# **Riding the rails: Chicago's route to a cardless transit payment system**

MARCH 1, 2017 BY SUMAN BHATTACHARYYA



The commuter of the future will hold out a smartphone to get on a train or bus without worrying about losing a transit card or lining up to reload. Goodbye tickets, passes and balance inquiries — everything will reside in an app.

The U.S. isn't quite there yet, but South Korean commuters have been able to use Samsung Pay to board buses and trains for over a year. While most mass transit payment systems in the U.S. still use older technology to collect fares, Chicago is getting closer to cardless payments. Chicago's experience shows how a phased transition lets customers adapt while allowing the transit system to absorb technical changes.

"You have to focus on customer and design your system to fit the customer experience," said Sushil Rajendran, Americas central region general manager for Cubic Transportation Systems, the contractor that built the updated fare system for the Chicago Transit Authority.

The transformation of Chicago's transit payment system was a \$500 million undertaking. In 2013, it launched the Ventra card, a digital account-based contactless card for subways and buses. Customers could tap a Ventra card to pay for purchases and use it as a debit card.

In November 2015, the city launched the Ventra app, which allowed riders to buy passes or add credit for bus or subway rides, and purchase mobile tickets for commuter rail. Single-fare trips can currently be paid for through mobile wallets such as Apple Pay, Android Pay and Samsung Pay, and customers may also use contactless credit and debit cards of their own. While the Ventra card value can be added from within the app, the physical card is still currently needed to access transit. The city is now working on a virtual Ventra card that would operate within an NFC-capable smartphone — a shift that would allow transit riders to tap their phones before getting on trains and buses.

Chicago's phased transition let customers catch up with the technology while giving the city's transit infrastructure time to cope.

"If you try to bite everything at once, the supplier can't deliver, and the organization is not likely to be able to handle it either," said Michael DeVitto, who managed payment systems for New York City's MTA for 27 years and is currently chief strategy officer at digital payments startup Waltz. "It gets disruptive if you say, 'On day one, we'll take out the existing card and put in a new system.' In Chicago, they knew Cubic, so their process of layering allowed them not to be so disruptive."

DeVitto said the process of building a new transit fare system is complicated by city contracting processes and technological hurdles, including old fare readers that are difficult and costly to replace.

Many transit companies use several financial institutions to process payments, adding a layer of complexity.

The recipe for Chicago's success required both an immediate fix for a legacy system that would soon no longer be supported and an experienced contractor, DeVitto said. Cubic had the benefit of having worked with Transport for London on its payment modernization efforts.

"They were a partner of Transport for London, and they used a lot of information that they gained from not just the technical side but on the process side," DeVitto said.

For Cubic, accommodating customers using a range of legacy products required marketing efforts, including websites and gate displays.



**“We had a divided group [of customers] — we had a large group using paper tickets, some using magnetic stripe cards, and others used smart cards,” said Rajendran.**

**Despite Chicago’s successes, for most cities, the transition to a modernized fare system won’t be easy. According to John Vasilj, a managing director at Accenture who focuses on transit, contactless cards aren’t catching on quickly and many customers still rely on cash. And while bigger cities may be able to emulate Chicago’s example, a smaller center may not be able to easily attract interest from companies that would build a new fare system.**

**“Chicago has scale, as there’s a lot of people who are going to use that system, so a system you might buy for Chicago you might not buy for a smaller mid-American city because there’s not the volume of users,” said Simon Laker, vp consulting at Consult Hyperion, a firm that advised Transport for London on its process to allow riders to use contactless cards to pay.**

**“You can get the big systems integrators interested in Chicago, but they may not be interested in a smaller city — it wouldn’t be commercially viable for them.”**

Source: <https://digiday.com/marketing/riding-the-rails-chicagos-route-to-a-cardless-transit-payment-system/>



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

**File #:** 17-2373      **Version:** 1      **Name:**  
**Type:** Contract      **Status:** Informational  
**File created:** 3/7/2017      **In control:** Clipper Executive Board  
**On agenda:** 3/20/2017      **Final action:**  
**Title:** Proposed Clipper® Contract Extension  
Update on the proposed contract extension with current Clipper® Contractor.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4b Current Clipper Contract Extension.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**

Proposed Clipper® Contract Extension

Update on the proposed contract extension with current Clipper® Contractor.

**Presenter:**

Carol Kuester

**Recommended Action:**

Information

**Attachments**



## Agenda Item 4b

Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

TO: Clipper® Executive Board

DATE: March 13, 2017

FR: Carol Kuester

RE: Proposed Clipper® Contract Extension

### Background

The Next Generation Clipper (C2) System Integrator Industry Review Draft request for proposal (RFP) was published on January 27, 2017, with the requirement that the vendor selected to perform the C2 contract (the “C2 Contractor”) will assume operation and maintenance of C1 (“C1 O&M”) while C2 is being designed and implemented. Since the current Clipper contractor, Cubic Transportation Systems, Inc. (Cubic), has a clear competitive advantage over other vendors for this work element, it will not be scored as a selection evaluation factor along with the other work required under the C2 RFP. Under the terms of the draft RFP, C1 O&M will be evaluated separately based on soundness of technical approach, cost effectiveness and cost realism, and MTC reserves the right not to award C1 O&M to the C2 Contractor.

Because of the complexity of designing a C2 fare collection system serving 22 transit operators there will be a period during design and implementation of C2 in which C1 O&M will have to be performed. Thus, at the request of the Clipper Executive Board, Clipper staff has been developing a Change Order to the current Contract with Cubic to extend C1 O&M for up to 5 years in order to assure a smooth customer transition to C2.

### Key Terms of Contract Extension

The proposed contract change order would guarantee two (2) additional years of O&M past the term of the current contract, and would also have the following key terms:

- A five-year extension of the current O&M term beginning November 3, 2019 that may be terminated by MTC if the selected C2 Contractor performs C1 O&M under the C2 Contract or, in whole or in part, before the end of the extension term;
- No change in existing O&M requirements or payment terms for the first year;
- At least one year and up to four years of continued O&M work by Cubic on as-needed basis, paid for by Time & Materials (T&M), capped at the monthly average cost of the first year extension, excluding any rent increases beyond Cubic’s current lease term;
- Cubic waives rights to recover costs for termination for convenience for any portion of the work terminated with at least one year notice by MTC, except for termination prior to the end of Year 2 and certain lease termination costs;
- Key Performance Indicators (KPIs) will be enforced for all portions of C1 O&M that remain intact during the T&M extension years; and
- Cubic will maintain the system in a state of good repair pursuant to the current Contract.



The proposed contract extension is based on the assumption that due to the complexity and age of the C1 backend and software, a technically sound proposal for C1 O&M from a vendor other than Cubic is likely to be substantially more expensive than a Cubic proposal or the C1 Contract's current cost. If proposals show otherwise, MTC anticipates that the selected C2 contractor would perform C1 O&M, and the proposed Contract Change Order would be terminated.

### **Summary**

MTC, as the contracting agency, has been negotiating the change order with Cubic, and transit operator staff have been briefed on the main points and key terms of the change order. MTC staff plans to return to the Clipper® Executive Board in April 2017 to obtain approval for the Contract Change Order with Cubic and will continue to update the Executive Board of any new developments.



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Carol Kuester



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 17-2340      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 2/14/2017      **In control:** Clipper Executive Board  
**On agenda:** 3/20/2017      **Final action:**  
**Title:** Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review  
Update on the C2 System Integrator RFP for Industry Review.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4c\\_C2 RFP for Industry Review.pdf](#)  
[4c\\_Handout-Comment for March 20 Clipper executive board meeting.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**

Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review

Update on the C2 System Integrator RFP for Industry Review.

**Presenter:**

Jason Weinstein

**Recommended Action:**

Information

**Attachments**



**Agenda Item 4c**  
Bay Area Metro Center  
375 Beale Street  
San Francisco, CA 94105  
TEL 415.778.6700  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

TO: Clipper® Executive Board

DATE: March 13, 2017

FR: Carol Kuester

RE: Next-Generation Clipper® (C2) Request for Proposal (RFP) for Industry Review

The Draft RFP for industry review was released on the [MTC website](#) on January 27, 2017, and an information webinar was held on March 1, 2017. The purpose of the information webinar was to spotlight certain sections of the Draft RFP and to answer any questions that interested vendors may have on the purpose of the industry review.

Interested vendors submitted requests for MTC to review specific areas of the Draft RFP. The specific areas of the Draft RFP that were highlighted in the Information Webinar included:

- Project Terms and Conditions;
- Proposed Design Process;
- Evaluation Process;
- Operation and Maintenance of the existing Clipper® system (C1); and
- Transition of C1 to C2.

Attachment A of this memo is the presentation that was shared with industry.

Interest in the Information Webinar was high, with 53 individuals representing 24 firms registering for the webinar. Registered firms included traditional system integrators, technology companies, payment industry firms, web and mobile application developers, fare collection equipment and card manufacturers, technology and management consulting firms, and information security firms. Attendance at the webinar also included staff from MTC, San Francisco Municipal Transportation Agency, and Golden Gate Transit, as well as various consultants.

Industry responses to the Draft RFP are due at 4:00p.m., April 3, 2017, and some firms have already submitted comments on the Draft RFP.

We look forward to updating the Clipper® Executive Board on initial industry response to the Draft RFP at the next Executive Board meeting in April.

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Carol Kuester

**Attachment:**

- Attachment A: C2 System Integrator Draft RFP for Industry Review Information Webinar



# C2 System Integrator Draft RFP for Industry Review **Information Webinar**

March 1, 2017

Clipper® Executive Board  
March 20, 2017

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- Operations and Maintenance of C1
- Transition of C1 to C2
- Questions
- Next Steps

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- Operations and Maintenance of C1
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# Project Terms and Conditions

- Specific terms and conditions in the RFP and Contract to consider in responding to the Draft RFP

# Liquidated Damages

- Liquidated Damages due MTC for Contractor's failure to perform the Critical Milestones in a timely manner shall be due at the rate of \$60,000 per Day
- Article 3.4.4 of the Contract



# Financial Guaranties

- **Bid Guaranty**
  - Proposals must be accompanied by a bid guaranty in the form of a cashier's check, a certified check, or a bid bond in the amount of 20% of the total bid amount
- **Letter of Credit**
  - Proposals must be accompanied by a commitment letter from a qualified LOC Bank stating its commitment to issue an initial Letter of Credit in the amount of \$5,000,000
- **Performance and Payment Bonds**
  - Contractor shall be required to provide a Performance Bond in the amount of 100% of the total Proposal Price to guarantee faithful performance of Contractor's obligations
  - Contractor shall be required to provide a Payment Bond in the amount of 100% of the total Proposal Price to inure to the benefit of persons performing labor or furnishing materials in connection with performance of Contractor's obligations
- **Parent Guarantee**
  - A Parent Guarantee of the performance of the Contractor's obligations is required if Contractor fails to provide assurance of its financial ability to perform all obligations to the satisfaction and standards established by MTC
- **RFP Section VII, Part 5, Section IX, Article J**

# Lost Revenue Responsibility

- Contractor shall bear all risk of loss to fare revenue due to any failure by the C2 System to properly process data
- Contractor's liability shall not exceed ten million dollars (\$10,000,000) annually
- Article 13.4 of the Contract

# Insurance Requirements

- Worker's Compensation Insurance and Employer's Liability Insurance
- Commercial General Liability Insurance
- Business Automobile Insurance
- Umbrella Insurance
- Errors and Omissions Professional Liability Insurance
- Property Insurance
- Employee Dishonesty/Crime Insurance
- Attachment E-1 of the RFP

# Intellectual Property

- MTC is the owner of all data, whether provided by MTC or generated in the C2 system
- Software ownership and licensing defined for:
  - Contractor software
  - Commercial software
  - Open source software and freeware
- Contractor responsible for escrow and verification at its cost
- Attachment H includes special conditions relating to Personally Identifiable Information
- Article 4.2 of the Contract

# Transit Operator Asset Procurement

- MTC will be the contracting agency
- Transit operators may directly procure equipment under Cooperative Use provisions with the same terms and conditions as this RFP
- System Integrator retains responsibility for overall C2 system regardless of contracting vehicle
- Section IX, Article M of the RFP

# Agenda

- Project Terms and Conditions
- **Proposed Design Process**
- Evaluation Process
- Operations and Maintenance of C1
- Transition of C1 to C2
- Questions
- Next Steps

# Proposed Design Process

- Develop the final design by aligning Contractor solutions and approaches with MTC and Transit operator needs
- Interactive design process that includes extensive use of prototypes to demonstrate Contractor's intended design
- Conceptual Design Review, Preliminary Design Review, and Final Design Review concepts are retained, with different levels of interactive demonstration at each stage
- Contractor's plan for stakeholder involvement is important
- Attachment A-3 of the RFP

# Design Process Pricing

- Proposers will submit milestones for design process
- Each milestone will require three (3) price sheets
- Target price represent price the Proposer will be required to adhere for each associated milestone
- Minimum price represents total minimum cost to design, implement, and test C2 and the % savings shared represents the shared savings between MTC and the Contractor if the actual price is below the target price
- Maximum price represents total maximum price to design, implement, and test C2 and the % overage shared represents the shared overage between MTC and the Contractor if the actual is above the target price
- Price Sheet C-3 of the RFP



# Design Process Payment

- Contractor shall be paid for completion of Design, Implementation, and Testing of the C2 system on a fixed price plus incentive fee basis
- MTC will pay target price for each milestone upon satisfactory completion, invoice receipt, and actual milestone cost information
- Upon receipt of final milestone, MTC will determine total % shared savings or overage and either pay Contractor or withhold as necessary
- Price Sheet C-3 of the RFP

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- **Evaluation Process**
- Operations and Maintenance of C1
- Transition of C1 to C2
- Questions
- Next Steps

# Overall Evaluation Process

- Overall responsiveness (Section II of the RFP)
  - Minimum Qualifications and Responsibility
  - General Responsiveness
  - Technical Viability
- Initial evaluation of responsive proposals, clarifications and optional oral presentations
- Second evaluation of proposals and identification of proposers in the competitive range
- Negotiations of contract terms with proposers in the competitive range
- Issuance of Best and Final Offer requests
- Evaluation of Best and Final offers
- Clipper Executive Board and MTC Commission Approval
- Section VIII of the RFP

# Evaluation Criteria

- Proposer Qualifications and Experience (20%)
- Technical Proposal (50%)
- Cost/Price Proposal (30%)

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- **Operations and Maintenance of C1**
- Transition of C1 to C2
- Questions
- Next Steps

# Operations and Maintenance of C1

- MTC requires that Proposers describe an approach and work plan for Attachment A-2, Operation and Maintenance of the C1 system at the end of the current C1 contract
- Operation to continue until the transition of customers to C2 is complete; orderly wind down after that
- Operations and maintenance of C1 includes:
  - Hosting and managing all central systems, hardware and software
  - Operating C1 and providing customer service
  - Maintaining all C1 devices and networks
  - Maintaining and modifying all software

# Pricing of O&M of C1

- Firm Fixed Price for all services (monthly)
- Costs will be basis for compensation to Contractor for O&M of C1
- Cost/price proposal shall be submitted separately from the other price forms
- Price Sheet C-2 of the RFP

# Evaluation of O&M of C1

- Cost/Price proposal will be considered separately and will not impact the cost/price evaluation
- O&M of C1 will not be included as part of overall Cost/Price evaluation
- Soundness of approach, price reasonableness, and cost realism will be reviewed prior to Contract award
- MTC reserves the right to award a contract that does not include O&M of C1 by the C2 Contractor
- Section VII of the RFP and Price Sheet C-8



# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- Operations and Maintenance of C1
- **Transition of C1 to C2**
- Questions
- Next Steps

# Transition of C1 to C2

- Transition of C1 to C2 includes:
  - Migration of all customer accounts
  - Customer Service functions
  - All other services
- “Single validator” approach that reads existing C1 and future C2 fare media
- As noted in Article 4.2.2 of the draft Contract, MTC will provide C1 System Materials and intellectual property upon execution of an NDA

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- Operations and Maintenance of C1
- Transition of C1 to C2
- **Questions**
- Next Steps

# Agenda

- Project Terms and Conditions
- Proposed Design Process
- Evaluation Process
- Operations and Maintenance of C1
- Transition of C1 to C2
- Questions
- **Next Steps**

# Next Steps

- 4:00 p.m., April 3, 2017 - Industry Responses Due
  - <https://www.surveymonkey.com/r/C2RFPIndustryFeedback>
- Summer 2017 - planned release of C2 System Integrator RFP



**Thank you!**

**From:** [Martha Silver](#)  
**To:** [Martha Silver](#)  
**Subject:** FW: Comment for March 20 Clipper executive board meeting  
**Date:** Monday, March 20, 2017 8:01:43 AM

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**From:** Russell Hancock [<mailto:hancock@jointventure.org>]  
**Sent:** Friday, March 17, 2017 12:15 PM  
**To:** Martha Silver <[MSilver@mtc.ca.gov](mailto:MSilver@mtc.ca.gov)>  
**Cc:** Carol Kuester <[CKuester@mtc.ca.gov](mailto:CKuester@mtc.ca.gov)>  
**Subject:** Comment for March 20 Clipper executive board meeting

Dear Ms. Silver:

I'm writing on behalf of the Managers Mobility Partnership to encourage "future-proofing" Clipper 2.

The [Managers Mobility Partnership](#) (MMP) is an agreement between the managers of four Silicon Valley cities (Palo Alto, Mountain View, Redwood City and Menlo Park) and Stanford University. The five partners agreed in May 2016 to work jointly to address transportation challenges facing their communities and the region. Joint Venture convenes the five entities and provides staffing and administrative support.

The MMP supports the Clipper 2 regional effort to create a more customer-centered public transit user experience, enabling travelers to seamlessly manage challenging multimodal journeys.

We encourage "future-proofing" Clipper 2 with:

- the ability to provide seamless, multi-modal plan/book/pay/ride/report capability across all transit providers
- the ability to quickly adopt future technologies such as intelligent agents working on behalf of travelers
- multiple Clipper 2 apps in a competitive marketplace, that could produce frequent (quarterly?) leap-frogging software updates. (We think of this as "Chicago Ventra versus GoLA on steroids.")

We also encourage identification and implementation of a multi-regional consensus vision for improved user experience and payments technology/policy—with a goal of making it more convenient for people not to drive—and a commitment to an open standard architecture to encourage innovative apps.

Last, but definitely not least, we encourage compassionate policies to improve mobility for low-income, unbanked, and disabled travelers.

Yours on behalf of the Partnership,

Russell Hancock  
Executive Manager for the MMP

.....  
**Russell Hancock**  
President & Chief Executive Officer  
Joint Venture Silicon Valley  
Silicon Valley Institute for Regional Studies  
100 West San Fernando Street, Suite 310  
San Jose, California 95113  
(408) 298-9330 [www.jointventure.org](http://www.jointventure.org)