



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

CALL AND NOTICE FOR SPECIAL CLIPPER® EXECUTIVE BOARD MEETING

1:30 p.m. Monday, June 4, 2018

Board Room – 1st Floor

Bay Area Metro Center

375 Beale Street

San Francisco, CA 94105

As Chair of the Clipper® Executive Board, I am calling a special meeting of the Clipper® Executive Board, in accordance with Section 3.03 of the Clipper® Executive Board Procedures, for June 4, 2018 at 1:30 p.m., at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA 94105, in the 1st Floor Board Room.

The business to be transacted will include: (1) Roll Call / Confirm Quorum; (2) Consent Calendar: (2a) Minutes of April 16, 2017 Meeting (Approval); (3) Approval: (3a) Contract Amendment – Clipper® Technical Advisor: CH2M Hill, Inc. (\$600,000) (Approval); (4) Information: (4a) Mobility as a Service (MaaS) and Clipper Partnership with Mobility Services (Information), (4b) Next-Generation Clipper® (C2) Customer Service Center Procurement (Information); (5) Executive Director's Report – Kuester (Information); (6) Public Comment / Other Business; and (7) Adjournment / Next Meeting.

Members of the public shall be provided an opportunity to directly address the Clipper® Executive Board agency concerning any item described in this notice, before or during consideration of that item. An agenda will be posted and distributed for this meeting by MTC staff in the normal course.

Denis Mulligan

May 29, 2018



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

Meeting Agenda

Clipper Executive Board

Members:

Denis Mulligan, Chair Edward D. Reiskin, Vice Chair

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

Monday, June 4, 2018

1:30 PM

Board Room – 1st Floor
Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

This meeting is scheduled to be webcast live on the Metropolitan Transportation Commission's Website: <http://mtc.ca.gov/whats-happening/meetings> and will take place at 1:30 p.m.

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. [18-0337](#) Minutes of April 16, 2018 Meeting

Action: Board Approval

Attachments: [2a CEB Minutes APR 16 2018.pdf](#)

3. Approval

3a. [18-0339](#) Contract Amendment - Clipper® Technical Advisor: CH2M Hill, Inc. (\$600,000)

Approval of a Contract Amendment for Technical Advisor services for the current Clipper® contract.

Action: Board Approval

Presenter: Jason Weinstein

Attachments: [3a_C1 Technical Advisor Amendment.pdf](#)

4. Information

- 4a. [18-0342](#) Mobility as a Service (MaaS) and Clipper Partnership with Mobility Services
- Action:* Industry Updates on Mobility as a Service.
Information
- Presenter:* Carol Kuester
- Attachments:* [4a MaaS.pdf](#)
- 4b. [18-0343](#) Next-Generation Clipper® (C2) Customer Service Center Procurement
- Update on the C2 CSC Procurement.
- Action:* Information
- Presenter:* Sara Barz
- Attachments:* [4b C2 CSC Procurement.pdf](#)

5. Executive Director's Report – Kuester

[18-0344](#)

Action: Information

6. Public Comment / Other Business

7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be Monday, July 16, 2018 at 1:30 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) 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

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 18-0337 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 4/20/2018 **In control:** Clipper Executive Board
On agenda: 6/4/2018 **Final action:**
Title: Minutes of April 16, 2018 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [2a_CEB Minutes_APR 16 2018.pdf](#)

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

Subject:
Minutes of April 16, 2018 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

Members:

Denis Mulligan, Chair Edward D. Reiskin, Vice Chair

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

Monday, April 16, 2018

1:30 PM

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

1. Roll Call / Confirm Quorum

Present: 7 - Rannells, Chair Mulligan, Vice Chair Reiskin, Fernandez, Crunican, Heminger, and Hartnett

Absent: 2 - Hursh, and Ramacier

Ahsan Baig acted as a delegate and voting member of the Board in place of Michael Hursh. Actions noted below as "Hursh" were taken by Baig.

2. Consent Calendar

Upon the motion by Vice Chair Reiskin and second by Hartnett, the Consent Calendar was unanimously approved. The motion carried by the following vote:

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

Absent: 1 - Ramacier

2a. [18-0155](#) Minutes of February 26, 2018 Meeting

Action: Board Approval

Attachments: [2a_CEB Minutes_Feb 26 2018.pdf](#)

2b. [18-0231](#) Contract Amendment - Legal Services for Procurement of the Next-Generation Clipper® (C2) System: Thompson Coburn LLP (Thompson Coburn) (\$100,000)

Action: Board Approval

Presenter: Melanie Morgan

Attachments: [2b_C2 Legal Advisor.pdf](#)

- 2c. [18-0230](#) Contract Change Order Amendment - Clipper® Program SSAE 16 Audit: Cubic Transportation Systems, Inc. (\$200,000)

Action: Board Approval

Presenter: Edward Meng

Attachments: [2c Clipper Contract Action SSAE 16 Audit.pdf](#)

- 2d. [18-0235](#) Contract Amendment - Clipper® Consultant Services: Invoke Technologies, Inc. (\$200,000)

Action: Board Approval

Presenter: Jason Weinstein

Attachments: [2d Invoke Technologies.pdf](#)

3. Approval

- 3a. [18-0232](#) Contract Actions - Clipper® In-Person Customer Services
- i. Contract Amendment - Clipper® Customer Service Center Operations at Embarcadero Bay Area Rapid Transit (BART) Station: Faneuil, Inc. (\$410,000)
 - ii. Contract Amendment - Clipper® Customer Service Center Operations at the San Francisco Ferry Building: Nematode Holdings, LLC (\$265,000)
 - iii. Funding Agreement Amendment - Clipper® Customer Service Center Operations 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: Kelley Jackson

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

Upon the motion by Rannells and second by Crunican, the following contract actions were approved: i. Contract Amendment - Clipper® Customer Service Center Operations at Embarcadero Bay Area Rapid Transit (BART) Station: Faneuil, Inc. (\$410,000); ii. Contract Amendment - Clipper® Customer Service Center Operations at the San Francisco Ferry Building: Nematode Holdings, LLC (\$265,000); and iii. Funding Agreement Amendment - Clipper® Customer Service Center Operations at Alameda-Contra Costa Transit District (AC Transit) Headquarters: AC Transit (\$250,000). The motion carried by the following vote:

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

Absent: 1 - Ramacier

- 3b.** [18-0233](#) Contract Actions - Customer Research, Education and Outreach for the Clipper® Program
- i. Contract Amendment - Customer Information Services: MIG, Inc. (\$625,000)
 - ii. Contract Amendment - Distribution and Communications Planning and Support Services: Synapse Strategies (\$250,000)
 - iii. Contract Amendment - Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000)
 - iv. Contract Amendment - Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (\$200,000)

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

Action: Board Approval

Presenter: Kelley Jackson

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

Upon the motion by Reiskin and second by Fernandez, the following contract actions were approved: i. Contract Amendment - Customer Information Services: MIG, Inc. (\$625,000); ii. Contract Amendment - Distribution and Communications Planning and Support Services: Synapse Strategies (\$250,000); iii. Contract Amendment - Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$200,000); and iv. Contract Amendment - Electronic Payments Consultant Assistance Services: Resource Development Associates, Inc. (\$200,000). The motion carried by the following vote:

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

Absent: 1 - Ramacier

- 3c.** [18-0234](#) Proposed Revisions to Clipper® Executive Board Policy

Update to Clipper® Executive Board Policy.

Action: Board Approval

Presenter: Edward Meng

Attachments: [3c Clipper Board Policy.pdf](#)

No action was taken on this item.

4. Executive Director's Report – Kuester

[18-0156](#)

5. Public Comment / Other Business

6. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be Monday, May 21, 2018 at 1:30 p.m. in the BART Board Room, 3rd Floor, 344 20th Street, Oakland, CA.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 18-0339 **Version:** 1 **Name:**
Type: Contract **Status:** Committee Approval
File created: 4/20/2018 **In control:** Clipper Executive Board
On agenda: 6/4/2018 **Final action:**
Title: Contract Amendment - Clipper® Technical Advisor: CH2M Hill, Inc. (\$600,000)

Approval of a Contract Amendment for Technical Advisor services for the current Clipper® contract.

Sponsors:

Indexes:

Code sections:

Attachments: [3a_C1 Technical Advisor Amendment.pdf](#)

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

Subject:

Contract Amendment - Clipper® Technical Advisor: CH2M Hill, Inc. (\$600,000)

Approval of a Contract Amendment for Technical Advisor services for the current Clipper® contract.

Presenter:

Jason Weinstein

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

TO: Clipper® Executive Board

DATE: May 29, 2018

FR: Carol Kuester

RE: Contract Amendment – Clipper® Technical Advisor: CH2M Hill, Inc. (\$600,000)

This memorandum requests Executive Board approval of a contract amendment between MTC and CH2M Hill, Inc. (CH2M Hill), in an amount not to exceed \$600,000 for continued technical oversight and advice services for the Clipper® program in FY 2018-19. This contract amendment was contemplated and is included in the Two Year Clipper® Budget and Work Plan approved by the Clipper Executive Board on February 26, 2018.

Background

In 2009, MTC entered into a competitively-procured, multi-year contract with Booz Allen Hamilton to provide technical support and oversight for the design and implementation of Clipper® on the Bay Area transit operators, as well as technical support for Clipper® operations and maintenance through 2019. Booz Allen Hamilton assigned this contract to CH2M Hill in 2011. Over the past seven years, CH2M Hill has supported many implementation and operations and maintenance tasks, including deployment of Clipper® at multiple transit agencies, integration of ticket vending machines and faregates, card inventory and retail network management, and design, testing, and deployment support for numerous system modifications.

Under the proposed amendment, CH2M Hill will provide support for the following activities in FY18-19 on an as-needed basis:

1. Administration of the Clipper® Contract, including change notice and change order development, proposal evaluation, and independent engineer's estimates;
2. Development and maintenance of a master schedule summarizing all work in progress;
3. Support transit operator requests for expansion and replacement of Clipper® equipment;
4. Delivery of various system modifications, including support for testing, distribution, and reports;
5. Management of card inventory and oversight of the Clipper® retail network;
6. Development and oversight of institutional programs, products, and strategy; and
7. Technical operations, including financial reconciliation and reporting, data analysis and reporting, asset management, and evaluation and support of system and device maintenance.

The contract amendment will provide resources equivalent to 2 full-time staff including subcontractors to support the activities above. In procuring technical advisor services, MTC weighs the value of directly hiring staff versus procuring specialized expertise. These activities fall within the scope of work outlined in the procurement.

Recommendation

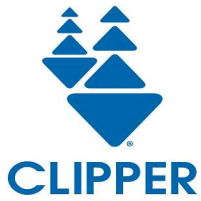
Staff recommends the Executive Board approve a contract amendment with CH2M Hill in an amount not to exceed \$600,000 for continuing technical oversight and support of the Clipper® program, bringing the total contract amount to \$15,557,566.



Carol Kuester

REQUEST FOR BOARD APPROVAL
Summary of Proposed Contract Amendment

Contractor:	CH2M Hill, Inc. Oakland, CA
Work Project Title:	Technical Advisor Contract
Purpose of Amendment:	Provide continued technical oversight and advice services for the Clipper® program
Brief Scope of Work:	Provide support of Clipper® Contract administration, project oversight, project coordination, operations support and deployment oversight during FY 2018-19.
Project Cost Not to Exceed:	\$600,000 (this Amendment) Total contract value including amendments before this amendment = \$14,957,566 Total contract amount with this amendment = \$15,557,566
Funding Source:	TCP, STP, CMAQ, STA, Regional Measure 2 Capital, Regional Measure 2 Operating, Marketing and Commuter Benefits, LCTOP, other bridge toll revenue (if available)
Fiscal Impact:	Funding dependent on approval of the FY 2018-19 MTC agency budget.
Motion by Board:	That a contract amendment with CH2M Hill, Inc. to provide consultant services as described above and in the Executive Director's memorandum dated May 29, 2018, is hereby approved by the Clipper® Executive Board.
Executive Board:	<hr/> Denis Mulligan, Chair
Approved:	Date: June 4, 2018



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 18-0342 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 4/20/2018 **In control:** Clipper Executive Board
On agenda: 6/4/2018 **Final action:**
Title: Mobility as a Service (MaaS) and Clipper Partnership with Mobility Services
Industry Updates on Mobility as a Service.

Sponsors:

Indexes:

Code sections:

Attachments: [4a_MaaS.pdf](#)

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

Subject:

Mobility as a Service (MaaS) and Clipper Partnership with Mobility Services

Industry Updates on Mobility as a Service.

Presenter:

Carol Kuester

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

TO: Clipper® Executive Board

DATE: May 29, 2018

FR: Carol Kuester

RE: Mobility as a Service (MaaS) and Clipper Partnership with Mobility Services

In the Clipper MOU, MTC and the transit operators identified the following program goal with respect to customer experience:

- Electronic fare payment is the primary payment method for all transportation fares and fees
 - Mobile fare payment is integrated into and branded as Clipper,
 - Parking at transit stations is paid with Clipper,
 - Bikeshare at transit stations can be paid with Clipper,
 - Paratransit trips can be paid with Clipper.

The above capabilities are part of the C2 system requirements; we expect these capabilities to be available under C2. In addition, a number of official and unofficial Clipper partnerships exist today (see Attachment A).

Providing a means to access and pay for mobility services is a central feature of Mobility as a Service strategies that are the subject of increasing attention. Mobility as a Service, most commonly referred to as MaaS, is still evolving, but is generally defined as a shift away from personally-owned modes of transportation towards mobility solutions that are consumed by customers as a service. In the Bay Area, private mobility options are steadily increasing. Residents and visitors have more mobility options than ever before. Some private mobility services help further regional goals, such as reducing vehicle miles traveled (VMT) or providing first- and last-mile connections. Additional information about MaaS is provided in Attachment B.

By forging Clipper partnerships with private mobility companies, MTC and the transit operators have opportunities to:

- 1) Provide riders with a more seamless customer experience and meet expectations that they can access/pay for transit-adjacent services with Clipper;
- 2) Accomplish established Clipper program goals;
- 3) Reward good public policy that helps meet Plan Bay Area mobility goals; and
- 4) Indirectly help jurisdictions sort through mobility providers.

Other transportation agencies are inquiring about whether and how Clipper might function as part of a MaaS platform. MTC's Planning Section through the *Horizon* initiative will be working

over the next year to develop policy recommendations to address key regional issues, including the future of mobility and travel demand management.

We welcome your initial feedback about Clipper's role in coordinating with other mobility services. In the coming months, MTC and transit operator staff will work to make recommendations about potential roles Clipper could play in supporting MaaS, or in advancing partnerships with mobility providers, and whether investment in C1 improvements to do so is warranted.



Carol Kuester

Attachments:

- Attachment A: Official and Unofficial Clipper Partnerships
- Attachment B: Mobility as a Service Definition

J:\COMMITTEE\Clipper Executive Board\CEB2018\06_CEB_JUN 2018\4a_MaaS_v3.docx

Attachment A Official and Unofficial Clipper Partnerships

Official partnership: Ford GoBike

MTC has a 10-year contract with Motivate and the Cities of Berkeley, Emeryville, Oakland, San Jose and the City and County of San Francisco, for the 7,000-bike regional bike share system called Ford GoBike. One of the functional specifications listed in the contract is to "Allow Annual Members to use Clipper Card to access Bicycles in lieu of key fob." This specification was intended to foster a bike share system that works as seamlessly as possible with transit. In addition to using Clipper as a membership identifier, Motivate is also in the process of becoming a Clipper card issuer. On June 28, 2017, when Ford GoBike launched, members were able to unlock a bicycle with a Clipper card. To date, 53% of active members, or 6,678 people, use their Clipper card as their membership identifier.

Partnerships with New Bike Share Systems

The inclusion of the Clipper-as-an-identifier specification in the Motivate contract, and the positive response from the public on its implementation, has led to plans to include Clipper as a membership identifier in three new MTC-funded bike share programs. The City of Richmond, the City of Fremont, and the Transportation Authority of Marin and Sonoma County Transportation Authority will be releasing bike share RFPs/RFIs this summer and are including use of Clipper card as a membership identifier in their specifications. Since these bike share programs were funded in part due to their first/last mile complement to the new transit investments in their jurisdictions (Richmond Ferry Terminal, Warm Springs BART and the SMART Train), the use of Clipper as a membership identifier will be a strong pairing.

Unofficial uses: JUMP Bikes, BikeLink eLockers, BikeHub parking, etc.

Social Bicycles, which has rebranded to JUMP and has recently been acquired by Uber, uses Clipper as a membership identifier. Social Bicycles started using the RFC Clipper technology in Bishop Ranch and also uses it on their 250 JUMP ebikes in San Francisco without a formal partnership with Clipper or contract with MTC.

BikeHub is using Clipper as an identifier for bike parking within the San Francisco BART stations. BikeHub informed MTC of this experiment but did not request permission or ask for a formal agreement.

BikeLink, the manufacturer of the eLock bike lockers joined BART to pilot how to use Clipper cards to unlock bike lockers at three BART stations in the East Bay. At the conclusion of the current pilot, SMART plans to adopt the Clipper functionality for all of its bike lockers throughout the SMART system in 2018.

These unofficial Clipper uses indicate demand from private mobility services to use the Clipper card as a payment identifier, providing a MaaS-lite experience without providing an app. One of the downsides for the region of not creating a formal agreement with these entities is that we lose the data which can inform our travel planning as well as the opportunity to have leverage over

the investments of these agencies or municipalities.

In addition to Ford GoBike, JUMP Bikes, BikeHub, and BikeLink, the following companies have approached the Clipper team about pursuing integration with their services or have started experimenting on their own with Clipper cards: Scoot, Tideline, Bird, Gig CarShare, Chariot, CommuterClub, and the Bay Area Air Quality Management District's Clean Vehicle Replacement Program.

Attachment B Mobility as a Service Definition

The standard service components involved in a MaaS program include the provision of route planning or real-time travel information, payment mechanisms, service bundles (fare products or subscriptions which package multiple modes), and provider and user incentives. MaaS researchers from Chalmers University created a topology for MaaS initiatives that identify levels of integration ranging from single distinct services to full-fledged mobility accounts that distribute incentives to users according to social policy:

- Level 0: No Integration -- Single separate services (E.g., Chariot, Caltrain mobile app)
- Level 1: Integration of information -- Multimodal travel planner, price info (E.g., Google Maps, Moovit)
- Level 2: Integration of booking and payment (E.g., Deutsche Bahn Navigator app)
- Level 3: Integration of the service offer -- Bundling/Subscription (E.g., UbiGo, Whim)
- Level 4: Integration of societal goals -- Policies, incentives (E.g., CCCTA pilot with Driver Miles)

In areas that have a sufficient variety of transportation services, companies are emerging that provide all levels of MaaS products. At its highest level, the MaaS concept is that these entities would integrate the various forms of transport services into a single mobility service accessible on demand.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 18-0343 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 4/20/2018 **In control:** Clipper Executive Board
On agenda: 6/4/2018 **Final action:**
Title: Next-Generation Clipper® (C2) Customer Service Center Procurement
Update on the C2 CSC Procurement.

Sponsors:

Indexes:

Code sections:

Attachments: [4b_C2 CSC Procurement.pdf](#)

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

Subject:

Next-Generation Clipper® (C2) Customer Service Center Procurement

Update on the C2 CSC Procurement.

Presenter:

Sara Barz

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

TO: Clipper® Executive Board

DATE: May 29, 2018

FR: Carol Kuester

RE: Next-Generation Clipper® (C2) Customer Service Center Procurement

This memorandum is to update Board members on key developments in the C2 Customer Service Center (CSC) procurement. The CSC procurement is one of four procurements currently planned for the C2 system, which also includes procurements for the System Integrator, Fare Media, and a Payment Gateway.

Background

In collaboration with a group of transit operator representatives and MTC staff, the C2 technical advisor IBI has developed a general Scope of Work (SOW) for the C2 CSC contractor. The SOW includes the following:

1. Operations to support the following communications channels: phone, email, social media, chat, mail, and fax
2. Other work activities:
 - a. Participation in C2 System Integrator design
 - b. Provision of Interactive Voice Response (IVR) system
 - c. Eligibility verification for Youth & Senior Fare Categories
 - d. Provision of tiered levels of customer service for private and institutional partners
 - e. Option to provide a Walk-in Center

In fall 2016, MTC staff reported to this Board about the potential opportunity to contract for a shared customer service center for both the Clipper and FasTrak programs. From 2016 to early 2018, MTC staff and technical consultants for both Clipper and FasTrak investigated the potential for a shared customer service center. Staff found that a shared customer service center might provide operational benefits and user experience benefits, but cost savings would likely be marginal. Moreover, the timelines for the Clipper and FasTrak customer service center procurements did not align. However, to allow the region to reevaluate aligning customer service activities for the two programs at a future time, staff recommends a contract term for the C2 CSC of five years, with options to extend, which will align the Clipper® and FasTrak CSC contract terms, permitting reassessment of a shared CSC at that time.

Next Steps

MTC staff anticipates finalization of the C2 CSC technical requirements this summer. From July through September, MTC, with input from transit operator staff, will finalize the RFP with the expectation of issuing the RFP in October 2018.

Over the summer, MTC and transit operator staff and will work to resolve outstanding issues related to the CSC contract, such as key performance indicators, performance incentives and disincentives, and contract payment mechanism.

We will continue to provide the Clipper® Executive Board with updates on key developments in the C2 CSC procurement process.



Carol Kuester

Attachments:

- Attachment A: C2 CSC Procurement Update



C2 CSC Procurement Update

Sara Barz

Clipper Executive Board
June 4, 2018

Agenda Item 4b
Attachment A

C2 Procurements

System Integrator
Customer Service Center
Fare Media
Payment Gateway



C2 Procurements

System Integrator

Customer Service Center

Fare Media

Payment Gateway



C2 Customer Service Center Scope

1. Operations Contract for Contact Center
2. Special Features
 1. Participant during System Integrator Design
 2. Interactive Voice Response (IVR) system
 3. Eligibility Verification for Youth & Senior Fare Categories
 4. Tiered Levels of Customer Service
 5. Option to provide a Walk-in Center



No Shared Contract for FasTrak & Clipper

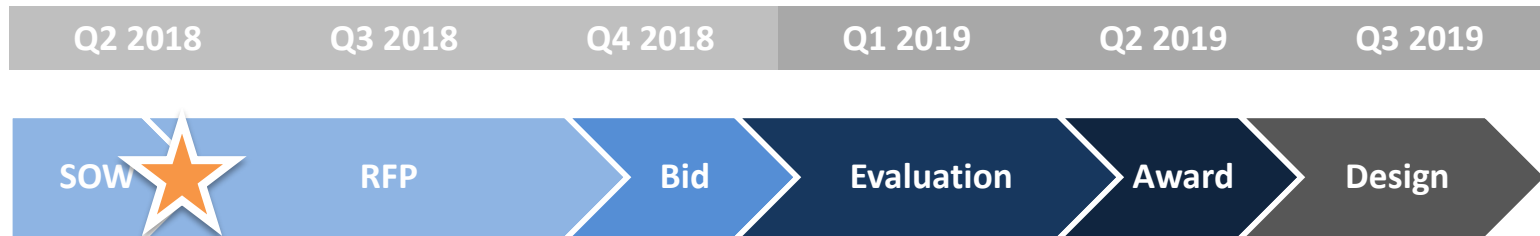
1. Individual C2 CSC Contract in 2018
2. Shorter contract term (~5 years) with opportunities for extension
3. Integration hooks / support for pilot opportunities in future
4. Collaboration with FasTrak CSC Procurement team to ensure reciprocity



C2 CSC Procurement Timeline



C2 CSC Procurement Timeline



Next Steps – Resolve Outstanding Items

1. Contract Duration
2. Contract Payment Mechanism
3. Service Levels / KPIs
4. Minimum Qualifications
5. Evaluation Criteria





Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 18-0344 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 4/20/2018 **In control:** Clipper Executive Board
On agenda: 6/4/2018 **Final action:**

Title:

Sponsors:

Indexes:

Code sections:

Attachments:

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

Recommended Action:
Information

Attachments: