



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, February 25, 2019	1:30 PM	San Francisco Bay Area Rapid Transit District 344 20th Street, 3rd Floor Oakland, CA 94612 BART Board Room
---------------------------	---------	---

---

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

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

#### 1. Roll Call / Confirm Quorum

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

#### 2. Consent Calendar

2a. [19-0027](#) Minutes of the December 17, 2018 Meeting

Action: Board Approval

Attachments: [2a CEB Minutes Dec 17 2018.pdf](#)

#### 3. Approval

3a. [19-0110](#) Clipper® Program Collaboration Policy

Principles and Guidelines for Partnership with the Clipper Program.

Action: Board Approval

Presenter: Carol Kuester

Attachments: [3a Clipper Program Collaboration Policy.pdf](#)

#### 4. Information

- 4a.     [19-0043](#)     Clipper® Draft Two Year Budget and Work Plan
- Clipper Two Year Operating and Capital Budget and Work Plan.
- Action:**           Information
- Presenter:**       Edward Meng
- Attachments:**   [4a Clipper Two Year Budget and Work Plan\\_w-Attachments.pdf](#)
- 
- 4b.     [19-0044](#)     Regional Fare Coordination and Integration
- Recent efforts on Regional Transit Fare Coordination and Integration.
- Action:**           Information
- Presenter:**       Carol Kuester
- Attachments:**   [4b Regional Fare Coordination.pdf](#)
- 
- 4c.     [19-0144](#)     Current Clipper® Program Update
- Update on the current Clipper system.
- Action:**           Information
- Presenter:**       Lysa Hale
- Attachments:**   [4c\\_C1 Program Update.pdf](#)
- 
- 4d.     [19-0112](#)     Next Generation Clipper® System Integrator Implementation Update
- Update on the Next-Generation Clipper System Integrator Implementation.
- Action:**           Information
- Presenter:**       Jason Weinstein
- Attachments:**   [4d\\_C2 SI Update.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 Monday, March 18, 2019 at 1:30 p.m. in the Caltrain / SamTrans Board Room, 2nd Floor, 1250 San Carlos Avenue, San Carlos, 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.

---

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 #:** 19-0027      **Version:** 1      **Name:**  
**Type:** Minutes      **Status:** Consent  
**File created:** 1/2/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Minutes of the December 17, 2018 Meeting  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [2a\\_CEB Minutes\\_Dec 17 2018.pdf](#)

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

**Subject:**  
Minutes of the December 17, 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, December 17, 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 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Crunican, Heminger, and Hartnett

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

### 2. Consent Calendar

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

**Aye:** 6 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Heminger and Hartnett

**Absent:** 3 - Rannells, Fernandez and Crunican

#### 2a. [18-1046](#) Minutes of November 5, 2018 Meeting

**Action:** Board Approval

**Attachments:** [2a CEB Minutes Nov 5 2018.pdf](#)

Board Member Crunican arrived after the approval of the Consent Calendar.

### 3. Approval

**3a.**     [18-1047](#)     Clipper® Executive Board 2019 Calendar

Clipper Executive Board 2019 meeting schedule

**Action:** Board Approval

**Presenter:** Edward Meng

**Attachments:** [3a\\_CEB 2018 Calendar.pdf](#)

**Upon the motion by Hursh and second by Hartnett, the Clipper® Executive Board 2019 Calendar was unanimously approved. The motion carried by the following vote:**

**Aye:** 7 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Crunican, Heminger and Hartnett

**Absent:** 2 - Rannells and Fernandez

**3b.**     [18-1049](#)     Clipper® Contract Change Order - Means-Based Pilot Program: Cubic Transportation Systems, Inc. (\$1,000,000)

Approval of a contract change order with Cubic Transportation Systems, Inc. for a Regional Means-Based Pilot Program available through Clipper.

**Action:** Board Approval

**Presenter:** Sara Barz

**Attachments:** [3b\\_Regional Means Based Approval.pdf](#)

**Upon the motion by Vice Chair Reiskin and second by Hartnett, the Clipper® Contract Change Order - Means-Based Pilot Program: Cubic Transportation Systems, Inc. (\$1,000,000) was approved. The motion carried by the following vote:**

**Aye:** 6 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Heminger and Hartnett

**Nay:** 1 - Crunican

**Absent:** 2 - Rannells and Fernandez

**3c.     [18-1050](#)     Clipper® Inactive Unregistered Funds Disbursement**

Authorization to disburse Inactive Unregistered Card Funds to the Clipper Budget.

**Action:** Board Approval

**Presenter:** David Weir

**Attachments:** [3c\\_Inactive Funds Distribution.pdf](#)

**Upon the motion by Crunican and second by Hartnett, the Clipper® Inactive Unregistered Funds Disbursement was unanimously approved. The motion carried by the following vote:**

**Aye:** 7 - Hursh, Ramacier, Chair Mulligan, Vice Chair Reiskin, Crunican, Heminger and Hartnett

**Absent:** 2 - Rannells and Fernandez

**4. Information****4a.     [18-1054](#)     Next Generation Clipper® System Integrator Implementation Update**

Update on the Next Generation Clipper System Integrator Implementation.

**Action:** Information

**Presenter:** Jason Weinstein

**Attachments:** [4a\\_C2 SI Update.pdf](#)

**5. Executive Director's Report – Kuester****[18-1093](#)     Executive Director Report**

**Action:** Information

**Presenter:** Carol Kuester

**Attachments:** [Attachment 1\\_would-you-like-a-ride-with-that.pdf](#)  
[Attachment 2\\_Los Angeles County Metropolitan Transpo...pdf](#)

**6. Public Comment / Other Business****7. Adjournment / Next Meeting**

**The next meeting of the Clipper® Executive Board will be January 28, 2019, 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 #:** 19-0110      **Version:** 1      **Name:**  
**Type:** Contract      **Status:** Committee Approval  
**File created:** 1/29/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Clipper® Program Collaboration Policy

Principles and Guidelines for Partnership with the Clipper Program.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [3a\\_Clipper Program Collaboration Policy.pdf](#)

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

**Subject:**

Clipper® Program Collaboration Policy

Principles and Guidelines for Partnership with the Clipper Program.

**Presenter:**

Carol Kuester

**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: February 19, 2019

FR: Carol Kuester

RE: Clipper® Program Collaboration Policy

At the November 2018 meeting, the Clipper Executive Board requested that staff provide guidance on objectives and criteria to collaborate with other transit or mobility-related third parties. Attached to this memorandum are proposed Clipper Program Collaboration Policy and Application Requirements. MTC and transit operator staff are bringing these documents to the Board for review and approval.

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

**Attachments:**

- Attachment A: Clipper Program Collaboration Policy
- Attachment B: Clipper Collaboration Application Requirements

J:\COMMITTEE\Clipper Executive Board\CEB2019\02\_CEB\_Feb 2019\3a\_Clipper Program Collaboration Policy\_v5.docx

## **Clipper® Program Collaboration Policy**

Objectives and criteria for evaluation of proposals for transit-related or adjacent collaborations are set forth below. Collaboration opportunities will be evaluated based on these objectives and criteria, and MTC and/or the Clipper Program and the participating operators reserve the right to reject any proposal submitted based upon the criteria in this Clipper Program Collaboration Policy (“Policy”).

### **Clipper objectives**

Building on the goals and objectives of the overall Clipper program in the Clipper Memorandum of Understanding, the objectives for the collaboration policy are:

- Expand the use of Clipper within participating transit agencies to:
  - Move towards 100% Clipper usage; and
  - Support payment for families, groups, institutional programs and events.
- Expand the reach of the Clipper program to:
  - Mobile (to be delivered through next generation Clipper system integrator (SI) contract);
  - Parking;
  - Bikeshare (Ford GoBike program is live, while other programs are under discussion);
  - Paratransit (to be delivered through next generation SI contract); and
  - Other transit/mobility opportunities as they arise.

### **Collaboration opportunities will do one or more of the following**

1. Encourage further use of Clipper;
2. Increase the visibility of Clipper within the Bay Area and strengthen the Clipper brand;
3. Expand Clipper’s reach, as detailed in the program objectives (above); and
4. Create revenue-generating opportunities for MTC/transit agencies:

### **Collaboration proposal evaluation criteria**

Potential participants must provide information about their proposed collaborative project, as outlined in Attachment B, Clipper Collaboration Application Requirements. The following considerations will be evaluated when reviewing collaboration opportunities.

#### **1. Non-exclusive arrangements within business sectors**

MTC will not enter into formal partnerships or exclusive collaborative arrangements or limit the number of participants within a certain business sector. Each proposal will be evaluated independent of any prior or upcoming collaborative activities.

#### **2. Increased use of transit or promoting the Clipper brand**

Opportunities that encourage or promote use of Clipper on public transit or that promote the Clipper brand and program will be given priority. However, collaborations that promote alternative forms of transit (bike, scooter, car share) or short-term events (special events, limited-time discount/promotional partnerships) will also be considered. For co-branding

opportunities, MTC shall retain final approval over the use of the Clipper logo and brand name.

### **3. Level of staff time required**

Staff time commitment is expected to be greater for proposals that encourage direct use of Clipper, and less for proposals where Clipper usage is secondary. If a proposal is for a collaboration that is not regional, but focused on one agency or geographic area, MTC or the Clipper program may request staff assistance from the agency involved.

### **4. Cost to the Clipper Program**

Where possible, collaboration participants should pay for costs associated with the proposed activities (development, operational and/or marketing and outreach costs). MTC and/or the Clipper program and the participating operators may choose to absorb some of these costs, depending on overall cost and the opportunities offered in return (revenue share, promotional or branding support, etc.). Ideally, the collaboration will include the opportunity to generate revenue for the Clipper program.

### **5. Level of involvement required by Clipper Contractor**

Proposals that require integration with Clipper systems – either customer facing, such as retail, website, or card distribution, or back-end, such as fund settlement, use of Clipper technology, etc. – will be evaluated based on the direct benefit to the Clipper program the proposed collaboration offers.

### **6. Current workload of the Clipper Program**

Ideally, a proposed collaboration should not delay any current or future work of the Clipper Program. Any development work by the Clipper Contractor necessitated by the proposed collaboration should be prioritized after current and upcoming workloads have been taken into account. MTC and/or the Clipper Program and the participating operators may decide to prioritize the proposed collaboration based on an expected increase in Clipper usage or visibility.

### **Application and Review Process**

Proposals must be in writing and submitted in accordance with the Application Requirements attached to this Policy. If a participating Clipper transit agency is approached by a potential collaborator or wishes to develop a collaboration proposal for their agency, they must forward the proposal to MTC to initiate the review process.

- After an initial review to determine if a collaboration proposal is consistent with this Policy, if there is no cost or development anticipated with the proposal, the Clipper Executive Director may recommend the proposal directly to MTC's Executive Director for review and approval.
- If there is an anticipated cost to the Clipper Program, or development by the Clipper Contractor is required, the proposal will be presented to the Clipper Executive Board (CEB) for approval. If the CEB approves the proposal, it will be referred back to MTC for final review and approval.

General

MTC reserves the right, from time to time, to suspend, modify, or revoke the application of any or all of this Policy as it deems necessary to comply with legal mandates, or to fulfill the goals and objectives referred to herein. All provisions of this Policy shall be deemed severable.

It is also MTC's policy and practice to assure equal application of this Policy without regard to race, color, marital status, sexual orientation, religion, national origin, ancestry, age, sex, gender identity, disability, medical condition, or Vietnam Era veterans' status.

*February 2019*



## **Clipper® Collaboration Application Requirements**

When proposing any type of collaboration or affiliation with the Clipper program, interested vendors/potential collaborators must provide the following information for consideration.

Proposals must be in writing and should be emailed as an attachment to the Clipper Executive Director, Carol Kuester at [ckuester@bayareametro.gov](mailto:ckuester@bayareametro.gov).

Proposals should contain information on all the items listed below.

1. Brief description of proposed program or collaboration. Please include the name, address, telephone and website of the proposer, as well as contact information for the primary contact.
2. Objective of the program
3. Benefit to Clipper brand and customers
4. Examples of existing collaborative relationships with programs similar to Clipper
5. Projected timing for program
  - a. Time needed to develop program
  - b. Length of program, e.g., one-time or ongoing?
6. Level of involvement with Clipper back-end systems (card and value orders, funds settlement, etc.)
7. Level of involvement with Clipper's public-facing activities (retail network, website, literature, card distribution, etc.)
8. Level of involvement of Clipper staff for development and maintenance of the program
9. Proposed plan for data sharing with Clipper
10. Proposed plan for promoting program
11. Funds needed from MTC (if any) for proposed program
  - a. Funds being provided by proposer for program
12. Additional information, as appropriate

*February 2019*



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

---

**File #:** 19-0043      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 1/7/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Clipper® Draft Two Year Budget and Work Plan  
Clipper Two Year Operating and Capital Budget and Work Plan.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4a Clipper Two Year Budget and Work Plan\\_w-Attachments.pdf](#)

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

**Subject:**

Clipper® Draft Two Year Budget and Work Plan

Clipper Two Year Operating and Capital Budget and Work Plan.

**Presenter:**

Edward Meng

**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: February 19, 2019

FR: Carol Kuester

RE: Clipper® Draft Two Year Budget and Work Plan

This memorandum presents the draft Clipper budget and work plan for FYs 2019-20 and 2020-21 for the Executive Board's review and discussion. Staff plan to bring this item to the Board in March 2019 for approval.

Under the Memorandum of Understanding, the Executive Board reviews and adopts a biennial Clipper budget. The budget is intended to provide an understanding of the scope and size of major expense categories and confirm availability of funding. The budget includes a work plan and staffing plan for the following two years and is updated annually. The budget includes both current Clipper system and next generation Clipper items, as well as transit-operator led and funded projects to enhance the current system.

Attached for your review are the budget and work plan for FYs 2019-20 and 2020-21. Included in the attachments are:

- Attachment A: Clipper Projected Operating Budget and Operating Budget Detail;
- Attachment B: Clipper Projected Capital Budget and Capital Budget Detail; and
- Attachment C: Clipper Two Year Budget and Work Plan Highlights.

### Highlights

1. Both Operating and Capital Budgets are balanced in the two year timeframe.
2. The Capital Budget is covered and funded through FY 2024-25.
3. A deficit in the Operating Budget is projected to occur in FY 2022-23.
4. At the request of the transit operators, an additional \$600K is included in the annual capital expenses to fund additional investment in the current system, particularly for small operators.
5. The organization chart assumes three additional MTC staff to support the accelerated deployment and continued development and deployment of the next generation Clipper system (See Attachment C pages 5 through 8 for detail on justification.)
6. The capital budget includes an additional \$1.5M in technical consultant support for the next generation Clipper system to deliver accelerated deployment.

### Detail Proposed FY 2019-20 and 2020-21 Budget and Work Plan

Details of the Clipper Draft Two Year Budget and Work Plan are listed below.

#### Detail

1. Since the last approved Clipper Projected Operating Budget, the program has managed to identify several fund sources to help offset short-term Operating deficits. In December 2018, the Clipper Executive Board approved the disbursement of \$1.46M of Inactive Unregistered Funds to the Clipper program, which is now reflected in the current year's Operating Budget (FY 2018-19). Furthermore, at the end of 2018, a portion of Float Account funds deemed not immediately needed for daily

operations were invested in a money market fund and began earning interest. That interest is expected to total an estimated \$1.5M annually based on current returns.

2. Based on this budget, an operating funding shortfall occurs in FY 2022-23, with an operating deficit of \$4.4M that grows larger in the following years. This is largely due to concurrent operating costs for both the current and next generation Clipper systems. MTC and transit agency staff are working to identify potential funding sources and solutions to address this shortfall, which may require changes to MTC and operator contributions.
3. Operating costs and MTC/transit operator contributions in this budget are assumed to be similar to current operating costs. The current assumption is that the current and next generation Clipper systems will operate in parallel in FYs 2019-20 (accelerated deployment) to 2023-24 (full deployment of the next generation system). Operator and Clipper staff are meeting to propose a detailed next generation Clipper cost sharing plan.
4. Since the approval of last year's Clipper Two Year Budget and Work Plan, the full capital cost of approximately \$194M for the next generation Clipper system integrator contract is now included in the capital budget. This budget assumes that expenses are incurred when major milestones and equipment deployment are achieved, and assumes that they occur at the current project schedule.
5. New fund sources in the capital budget include:
  - Regional Measure 3 - \$50M
    - The Regional Measure 3 Bill contains \$50M in funds for the design, development, testing, installation, and transition of the next generation Clipper system.
    - State of Good Repair (SGR) Population-Based Funds - \$10.2M annually beginning FY 2018-19
    - Senate Bill 1 funds \$10.2M annually for the development and deployment of the C2 system. Those funds are assumed in the Clipper budget until capital needs are met.
6. The capital budget assumes three additional MTC staff members to support various initiatives related to transit operator support, next generation Clipper deployment, and other various initiatives, as well as increased next generation Clipper technical advisor support for transit operators in advance of accelerated deployment.
7. At the request of the transit operators, an annual pool of around \$600K in capital funds is budgeted for new capital initiatives in order to support smaller projects, especially for smaller operators.

MTC and transit operator staff will continue to work together to update the operating and capital budgets and plan to return to the Clipper Executive Board next month to obtain approval for the Clipper Two Year Budget and Work Plan.

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

**Attachments:**

- Attachment A: DRAFT Clipper Projected Operating Budget and Operating Budget Detail
- Attachment B: DRAFT Clipper Projected Capital Budget and Operating Capital Detail
- Attachment C: Clipper Two Year Budget and Work Plan Highlights

**DRAFT CLIPPER® PROJECTED OPERATING BUDGET - FEBRUARY 4, 2019**

Item No.	Descriptions	Current FY 18/19 (\$M)	FY 19/20 (\$M)	FY 20/21 (\$M)	FY 21/22 (\$M)	FY 22/23 (\$M)	FY 23/24 (\$M)	FY 24/25 (\$M)
<b>MTC Operating Costs</b>								
1	Annual C1 Operating Costs - MTC	\$8.8	\$9.3	\$9.7	\$10.0	\$5.0	\$1.0	\$0.0
2	Annual Next Gen Clipper SI Operating Costs - MTC	\$0.0	\$0.3	\$0.8	\$1.9	\$6.4	\$7.3	\$7.7
3	Annual Next Gen Clipper Other Operating Costs - MTC <sup>1</sup>	\$0.0	\$0.7	\$1.3	\$2.0	\$2.6	\$2.7	\$2.8
4	MTC Staff	\$1.3	\$1.3	\$1.3	\$1.4	\$1.4	\$1.5	\$1.6
5	Clipper® Operations - Misc.	\$0.6	\$0.6	\$0.7	\$0.7	\$0.7	\$0.8	\$0.8
6	In Person Customer Service Centers	\$1.1	\$1.2	\$1.2	\$1.3	\$1.4	\$1.4	\$1.5
7	Customer Education Program	\$1.4	\$1.8	\$1.8	\$1.9	\$2.0	\$2.1	\$2.2
8	Consultants	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
9	<i>Subtotal MTC expenses</i>	\$13.4	\$15.0	\$16.9	\$19.1	\$19.6	\$16.9	\$16.6
<b>Transit Agency Costs</b>								
10	Annual C1 Operating Costs - Transit Agencies	\$17.6	\$18.5	\$19.4	\$19.9	\$10.0	\$2.0	\$0.0
11	Annual Next Gen Clipper SI Operating Costs - Transit Agencies	\$0.0	\$0.5	\$1.6	\$3.8	\$13.1	\$14.8	\$15.7
12	Annual Next Gen Clipper Other Operating Costs - Transit Agencies <sup>2</sup>	\$0.0	\$3.3	\$6.2	\$8.5	\$11.9	\$12.2	\$12.5
13	<i>Subtotal Transit Agency expenses</i>	\$17.6	\$22.4	\$27.2	\$32.3	\$34.9	\$29.0	\$28.1
14	<b>Total Operating Costs (MTC+Transit)</b>	<b>\$31.0</b>	<b>\$37.4</b>	<b>\$44.1</b>	<b>\$51.4</b>	<b>\$54.6</b>	<b>\$45.9</b>	<b>\$44.8</b>
<b>Operating Revenues</b>								
15	Total STA Revenues	\$9.7	\$7.1	\$7.5	\$7.3	\$7.5	\$7.7	\$7.8
16	Total RM2 Marketing Revenue	\$1.1	\$1.1	\$1.1	\$1.1	\$1.1	\$1.1	\$1.1
17	Additional RM2 Marketing Revenue <sup>3</sup>	\$1.5	\$1.7	\$1.7	\$1.7	\$1.7	\$1.7	\$1.7
18	Additional RM2 Operating Revenue <sup>3</sup>	\$2.0	\$2.0	\$2.0	\$2.0	\$2.0	\$2.0	\$2.0
19	Unregistered Inactive Funds	\$1.5	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
20	Cap and Trade	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
21	Float Account Interest	\$0.0	\$1.5	\$1.5	\$1.5	\$1.5	\$1.5	\$1.5
22	Total Transit Agency Revenue	\$17.6	\$22.4	\$27.2	\$32.3	\$34.9	\$29.0	\$28.1
23	<b>Total Operating Revenue</b>	<b>\$33.4</b>	<b>\$35.8</b>	<b>\$41.0</b>	<b>\$45.9</b>	<b>\$48.7</b>	<b>\$43.0</b>	<b>\$42.2</b>
24	<b>Cumulative Surplus/Deficit<sup>4</sup></b>	<b>\$8.6</b>	<b>\$7.0</b>	<b>\$3.9</b>	<b>\$1.4</b>	<b>(\$4.4)</b>	<b>(\$7.3)</b>	<b>(\$9.8)</b>

<sup>1</sup> Includes O&M for CSC

<sup>2</sup> Includes O&M for CSC, Pass Through Fees (incl. Mobile Fees & Third Party Commissions), Payment Gateway Fees, etc.

<sup>3</sup> Contingent upon availability and MTC Commission Approval

<sup>4</sup> Operations Carry Forward From Prior Year = \$6.2M

Assumes continuation of ~ 1/3 MTC, 2/3 Transit Agency split of non-Pass Through Fees in C2 & Agencies can pay their share

Assumes 10% tax, no contingency

**TABLE 1A: Operating Budget Detail DRAFT**  
**February 4, 2019**

Operating Budget Item #	Category	Project Name	Vendor	Current FY 18/19 (\$M)	FY 19/20 (\$M)	FY 20/21 (\$M)
1	Annual C1 Operating Costs - MTC	MTC share of annual C1 operating costs per the MOU	Cubic	8.82	9.26	9.72
2	Annual Next Generation Clipper System Integrator Operating Costs - MTC	Estimated MTC share of Next-Gen Clipper System Integrator annual operating costs	Cubic	0.00	0.27	0.79
3	Annual Next Generation Clipper Other Operating Costs - MTC	Estimated MTC share of Next-Gen Clipper Other Operating costs	TBD	0.00	0.66	1.32
4	MTC Staff	MTC Staff	MTC	1.35	1.25	1.31
5	Clipper Operations - Misc.	Data Store, ATT Network Services, Storage Fees	Various	0.11	0.12	0.12
		SSAE Audit	Cubic	0.22	0.23	0.24
		Operational Reporting and Analysis	RDA	0.20	0.21	0.22
		Website Maintenance	Cubic	0.08	0.08	0.08
6	In Person Customer Service Centers	AC Transit In Person Customer Service Center	AC Transit	0.25	0.25	0.25
		Embarcadero Kiosk	Fanueil	0.50	0.53	0.56
		Bay Crossings In Person Customer Service Center	Nematode	0.30	0.32	0.34
		Transportation Information Booth	Fanueil	0.08	0.08	0.08
7	Customer Education	Creative design for website and customer education initiatives	MIG	0.55	0.55	0.55
		Ad Campaigns	TBD	0.50	0.50	0.50
		Research/Survey	TBD	0.00	0.15	0.15
		Next-Generation Customer Research	TBD	0.00	0.25	0.25
		Outreach Support	Caribou	0.20	0.25	0.25
		Production costs for signage and collateral	TBD	0.02	0.04	0.04
		Cardholder Materials	Cubic	0.15	0.05	0.10
8	Consultants	Program Mgt. and Strategic Planning	Synapse Strategies	0.03	0.00	0.00
9	TOTAL			13.36	15.04	16.88



**DRAFT CLIPPER® PROJECTED CAPITAL BUDGET - FEBRUARY 20, 2019**

Item No.	Description								TOTAL FY 18/19 - 24/25 (\$M)
		Current FY 18/19 (\$M)	FY 19/20 (\$M)	FY 20/21 (\$M)	FY 21/22 (\$M)	FY 22/23 (\$M)	FY 23/24 (\$M)	FY 24/25 (\$M)	
Capital Costs (See Table 2 for Cost Detail)									
	Current Clipper® System (C1)								
1	MTC Staff	\$1.2	\$1.3	\$1.3	\$0.7	\$0.0	\$0.0	\$0.0	\$4.5
2	Clipper Cards & Fare Media	\$4.0	\$4.0	\$4.0	\$3.0	\$3.0	\$2.0	\$1.0	\$21.0
3	Consultants	\$0.8	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$0.0	\$5.8
4	System Enhancements	\$1.3	\$0.6	\$0.6	\$0.6	\$0.0	\$0.0	\$0.0	\$3.1
5	System Enhancements - Operator Requested and Paid	\$0.9	\$1.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$2.4
6	Infrastructure Refresh/End-of-Lifecycle Replacement	\$3.5	\$3.0	\$3.0	\$0.0	\$0.0	\$0.0	\$0.0	\$9.5
	Next Generation Clipper® System								
7	MTC Staff	\$1.9	\$3.5	\$3.7	\$5.8	\$6.1	\$6.4	\$6.7	\$34.0
8	System Integrator Contract <sup>1</sup>	\$12.9	\$47.8	\$22.4	\$62.0	\$15.6	\$28.5	\$5.2	\$194.3
9	Customer Service Center	\$0.0	\$1.0	\$0.5	\$0.5	\$0.5	\$0.0	\$0.0	\$2.5
10	Integrate Existing TVMs/Faregates	\$0.0	\$4.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$4.0
11	Replace TVMs/Faregates - Operator Paid	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
12	Consultants	\$1.9	\$2.0	\$2.7	\$2.0	\$2.1	\$2.2	\$2.3	\$15.2
13	Total Expenses	\$28.3	\$69.7	\$39.2	\$75.6	\$28.2	\$40.1	\$15.2	\$296.3
Revenue									
14	TCP - FTA	\$5.0	\$0.0	\$14.1	\$15.5	\$15.5	\$15.5	\$15.5	\$81.1
15	TCP - OBAG2-STP/CMAQ	\$5.7	\$8.8	\$20.4	\$0.0	\$0.0	\$0.0	\$0.0	\$34.8
16	TCP - OBAG2-RM2	\$2.6	\$10.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$13.0
17	Fare Media and Card Fee Revenue	\$5.0	\$5.0	\$5.0	\$5.0	\$5.0	\$5.0	\$5.0	\$35.0
18	Operator Paid Revenue	\$0.9	\$1.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$2.4
19	Cap and Trade	\$3.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.1
20	Regional Measure 3	\$0.0	\$0.0	\$0.0	\$50.0	\$0.0	\$0.0	\$0.0	\$50.0
21	SB1 State of Good Repair	\$10.2	\$10.2	\$10.2	\$10.2	\$6.6	\$0.0	\$0.0	\$47.4
22	BATA Rehab	\$9.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$9.6
23	Total Annual Revenue	\$42.1	\$35.9	\$49.7	\$80.7	\$27.1	\$20.5	\$20.5	\$276.5
24	Cumulative Surplus/Deficit <sup>2</sup>	\$38.8	\$5.1	\$15.6	\$20.7	\$19.6	\$0.0	\$5.3	

<sup>1</sup> Assumes Contract Ceiling Price, No Open Payment Deployment, 15% Contingency, 10% tax where applicable

<sup>2</sup> Capital Carry Forward From Prior Year = \$25.1M

TABLE 1A: Capital Budget Detail **DRAFT**  
February 20, 2019

Item #	Category	Project Name	Vendor	Current 2018/19 (\$M)	2019/20 (\$M)	2020/21 (\$M)	Description
Current Clipper System							
1	MTC Staff	MTC Staff	MTC	1.20	1.26	1.32	MTC staff funded with capital funds
2	Clipper Cards	Clipper card order	Cubic	4.00	4.00	4.00	Annual Clipper card order
3	Current System Consultants	Technical Advisor	Jacobs	0.60	0.80	0.80	Tech Advisor support expected to increase in the short term to fulfill current staffing needs and maintain state of good repair of current system
		Capital projects support	TBD - bench contract	0.20	0.20	0.20	As needed support from Consultant Assistance Bench, including data and reporting infrastructure improvements
			Subtotal:	0.80	1.00	1.00	
4	Current System Enhancements	Credit card improvement initiatives	Cubic	0.20	-	-	Card acceptance/fraud reduction, selective card blocking
		Regional Means-Based Discount	Cubic	1.00	-	-	Implementation of a regional means-based discount on Clipper for multiple operators
		Operator Requested Regionally Approved Enhancements	Cubic	-	0.60	0.60	Enhancements to the system specially requested by operators that are approved by the region
		Operator asset management tracking	Cubic	0.10	-	-	Enhancement for automated tracking of bus equipment and maintenance
			Subtotal:	1.30	0.60	0.60	
5	Current System Enhancements - Operator Requested and Paid	Caltrain - TVM Integration	TBD	-	0.1	-	Integrate Caltrain TVMs with Clipper
		GG - Business Rule Simplification	Cubic	0.12	-	-	Implementation of new transfer rules for Golden Gate Transit
		GG - Tiburon	Cubic	TBD	TBD	TBD	Creation of Tiburon Ferry product
		GG - Tiburon	Cubic	TBD	TBD	TBD	Equipment Installation at Tiburon Ferry Terminal for CIDs, TVM, and TDS
		GG - TVM Replacement	Cubic	TBD	TBD	TBD	Third Party Integration with an external TVM supplier, or a solution for a new TVM not tied to SFMTA
		Marin Transit - Standalone Operator	Cubic	-	TBD	TBD	Conversion of business rules from dual-tag to flat fare payment
		SFMTA - Lifeline Pass	Cubic	-	1.5	-	Transition Lifeline Pass to Clipper-only
		VTA - TVM Integration	Cubic	0.16	-	-	Integration of VTA TVMs to dispense Clipper cards
		WETA - Richmond & San Francisco	Cubic	0.60	-	-	Equipment Installation at Richmond Ferry Terminal and expansion at San Francisco Ferry Terminal
		Multiple Operators - Fleet Replacement and Expansion	Cubic	TBD	TBD	TBD	Bus device procurements for fleet replacements and expansion
		Multiple Operators - New Driver Console (DC3) - Single Point Log-on	Cubic	TBD	TBD	TBD	Onboard integration of Clipper and other vehicle systems for operators with new bus devices
			Subtotal:	0.88	1.56	-	
6	Infrastructure Refresh/End-of-Lifecycle	Replace end-of-life equipment as needed	Cubic	3.50	3.00	3.00	Replace obsolete equipment at end of lifecycle
			Subtotal:	3.50	3.00	3.00	
Next Generation Clipper System							
7	MTC Staff	MTC Staff	MTC	1.89	3.50	3.68	MTC staff funded with capital funds eligible for equipment/system replacement
8	System Integrator Contract	Next Generation Clipper System Integrator	Cubic	12.88	47.79	22.35	Replace back end systems and front end devices (retailer devices, ticket office terminals, vehicle and platform card readers, handheld readers)
9	Customer Service Center	Next Generation Clipper Customer Service Center provider	TBD	-	1.00	0.50	Provide customer service functions related to the Next-Generation Clipper fare payment system
10	Integrate TVMs and Faregates	Integrate existing TVMs and faregates	TBD	-	4.00	-	Existing TVMs and faregates will be integrated into the next-generation system. Individual operators are responsible for replacement (see Line 10). Integration estimate assumes Cubic supplies web-based API, all existing hardware is adequate, and no change to credit/debit gateways.
11	Replace TVMs and Faregates	Replace TVMs and faregates	TBD	-	-	-	Replacement of TVMs and faregates is <u>not</u> included in the scope of next-generation Clipper; only integration of the existing TVMs and faregates. Operators are responsible for replacement costs.
12	Consultants	Next Generation Clipper RFP Financial Evaluation	KPMG	0.10	-	-	Financial evaluation and review of vendor proposals for cost realism and cost effectiveness
		Next Generation Clipper Strategic Planning/Advice Contract	Invoke	0.20	0.20	0.20	Strategic planning/advice during next-generation Clipper procurement and implementation
		Next Generation Clipper Legal Support	Thompson Coburn	0.20	-	-	Legal and contracting support for next-generation Clipper procurement and implementation
		Next Generation Clipper Technical Advisor	IBI Group	1.40	1.75	2.50	Next-generation Clipper planning, procurement, management, implementation, and technical support
			Subtotal:	1.90	1.95	2.70	
13		TOTAL		28.35	69.66	39.15	





# Clipper Two Year Budget and Work Plan Highlights

February 21, 2019

# Funding in Good Shape

## Capital

\$25.1M	Prior Year Carry-Over (as planned)
\$50M	Regional Measure 3 (FY 20/21)
\$10.2M/yr	Senate Bill 1 State of Good Repair

## Operations

\$6.2M	Prior Year Carry Over (as planned)
\$1.46M	Float Account Release (Inactive Unregistered Cards – FY 18/19)
\$1.5M (est.)/yr	Float Account Interest

Operations deficit begins in FY 22/23



# Capital Budget Highlights

DRAFT CLIPPER PROJECTED CAPITAL BUDGET - JANUARY 17, 2020

Item No.	Description	Current FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	FY 24/25	TOTAL FY 19/20 - 24/25
<b>Capital Costs (See Table 2 for cost details)</b>									
<b>General Support Systems (GSS)</b>									
1	MTC Staff	\$1.0	\$1.2	\$1.3	\$0.0	\$0.0	\$0.0	\$0.0	\$4.3
2	Clipper Core & New Media	\$4.0	\$4.0	\$4.0	\$0.0	\$0.0	\$0.0	\$1.9	\$19.0
3	Consultants	\$0.0	\$1.0	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.0
4	System Enhancements	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.0
5	System Enhancements - Operator Requested and Paid	\$0.0	\$1.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$2.4
6	Infrastructure Refresh/End-of-Life/Replacement	\$3.5	\$3.0	\$3.0	\$0.0	\$0.0	\$0.0	\$0.0	\$9.5
<b>Next Generation Clipper® System</b>									
7	MTC Staff	\$3.9	\$3.0	\$3.1	\$4.9	\$0.2	\$1.4	\$0.7	\$23.3
8	System Integrator Contract <sup>1</sup>	\$12.9	\$47.9	\$12.4	\$42.0	\$15.6	\$28.5	\$5.2	\$194.2
9	Customer Service Center	\$0.0	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.0
10	Integrate Existing Traffic/Programs	\$0.0	\$4.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$4.0
11	Replace TSM/Engines - Operator Paid	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
12	Consultants	\$1.0	\$2.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.0
13	<b>Total Expenses</b>	<b>\$38.5</b>	<b>\$59.5</b>	<b>\$18.5</b>	<b>\$76.7</b>	<b>\$27.8</b>	<b>\$39.5</b>	<b>\$14.3</b>	<b>\$391.5</b>
<b>Revenue</b>									
14	TFP - MTA	\$0.0	\$0.0	\$14.1	\$15.1	\$15.1	\$16.5	\$16.5	\$61.3
15	TFP - CBAGG STP/CANAL	\$5.7	\$6.8	\$18.4	\$0.0	\$0.0	\$0.0	\$0.0	\$30.9
16	TFP - CBAGG ADAG	\$2.4	\$10.8	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$13.2
17	New Media and Card Fee Revenue	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
18	Operator Paid Revenue	\$0.0	\$3.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.6
19	Cap and Trade	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
20	Regional Measure B	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
21	GRS State of Good Repair	\$12.0	\$10.3	\$10.2	\$10.2	\$2.8	\$0.0	\$0.0	\$45.5
22	GRS Future	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
23	<b>Total Annual Revenue</b>	<b>\$47.5</b>	<b>\$31.9</b>	<b>\$42.7</b>	<b>\$25.3</b>	<b>\$17.8</b>	<b>\$16.5</b>	<b>\$16.5</b>	<b>\$172.5</b>
24	<b>Consolidated Surplus/Deficit<sup>2</sup></b>	<b>\$9.0</b>	<b>\$27.7</b>	<b>\$24.2</b>	<b>\$11.4</b>	<b>\$11.6</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$318.0</b>

FY 19/20	FY 20/21
\$1.2	\$1.3
\$4.0	\$4.0
\$1.0	\$1.0
\$0.6	\$0.6
\$1.6	\$0.0
\$3.0	\$3.0
\$3.0	\$3.1
\$47.8	\$22.4
\$1.0	\$0.5
\$4.0	\$0.0
\$0.0	\$0.0
\$2.0	\$2.7
\$69.1	\$38.5

## Change

## Detail

Next Generation SI  
Contract Costs

Executed contract with actual costs

Next Generation  
Accelerated  
Deployment

Earlier next generation system capital costs due to accelerated deployment

Consultant  
Support

Increased near-term support for accelerated deployment and strategy

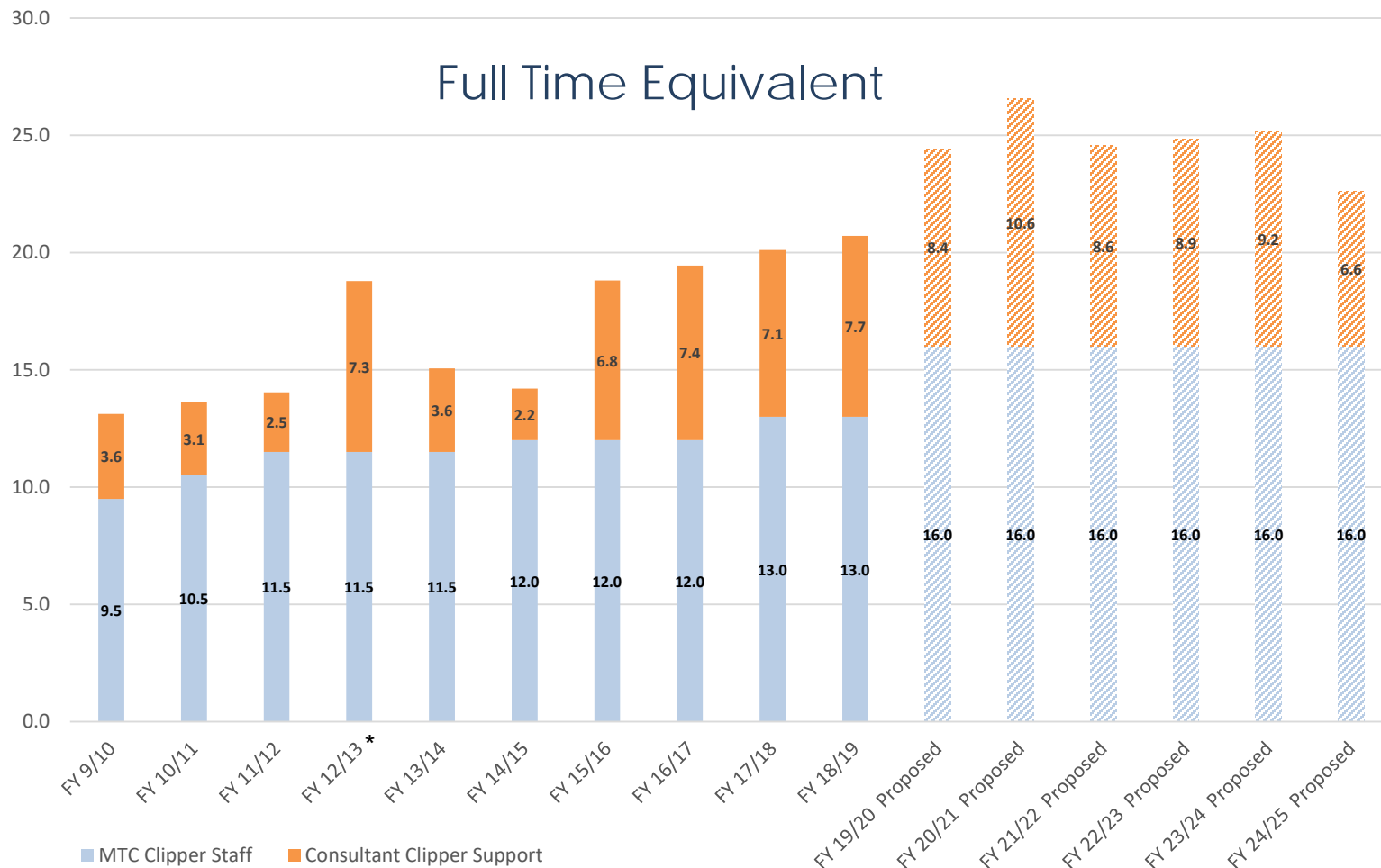
MTC Support

Three additional staff for new contracts, institutional programs and operator support

Enhancement Pool

\$600K fund for small projects

# Clipper Historical Staffing Resources

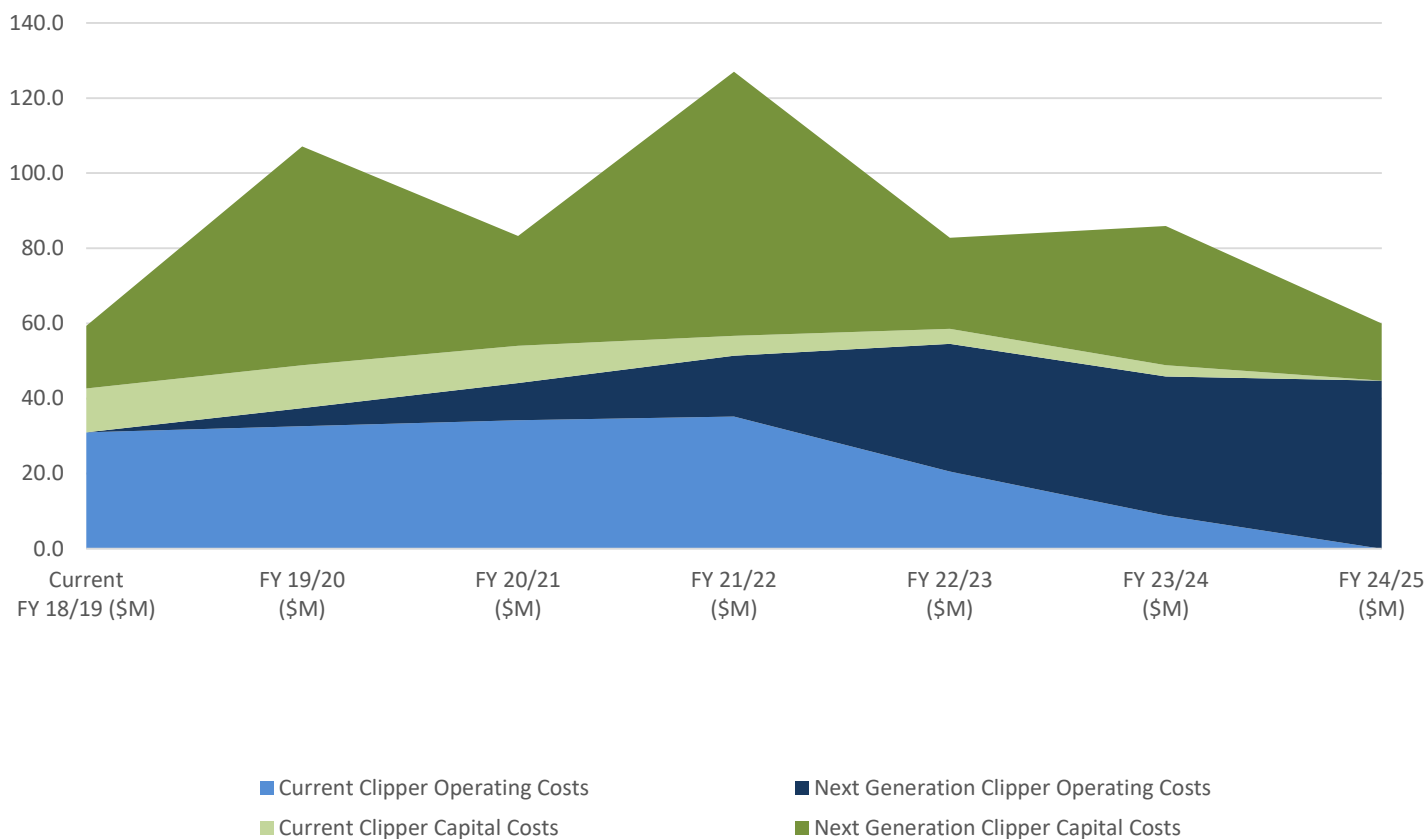


\* Bump in consultant staff for support of the SFMTA fare gate and ticket vending machine installation project.

Note: MTC Clipper staff has been consistent at ~12 FTE since 2011. In 2017 one new position was added to support the C2 procurement. Since 2011, the number of active Clipper accounts has grown 225% and the number of monthly transactions has grown 100%.

# Clipper Historical Staffing Resources

## Capital & Operating Budget Over Time



# Clipper Staffing

- Three vacancies – all backfills – in recruitment now. Expected start dates ~ March 2019
  - Two positions under Eric Davis/Operations
  - One position under Lysa Hale/Cust Ed & Service Center
  - Once filled we're at historical status quo: ~12 Clipper FTE



# Clipper Staffing

- Three new positions requested for FY 2019-20
  - Recruitment begins July 2019 earliest
  - Positions funded by Clipper program budget
  - Staff needed to assume new assignments (see following slides)



# Why Increased Staffing? New Work

## #1& 2: Deliver C2/Accelerated Deployment

- Support and coordinate current Clipper and next generation Clipper systems now through ~ 2023
- Deliver on accelerated next gen schedule
  - Accelerated deployment depends on timely review, response
  - Proposal adds FTE to support transit agencies' reviews
- Deliver Clipper multimodal integration in next generation Clipper system
  - Rail, ferries 100% Clipper
  - Parking
  - Mobility as a Service?
- Procure, operate and coordinate three additional contracts;
  - Customer service center
  - Credit/debit gateway
  - Fare media (cards)





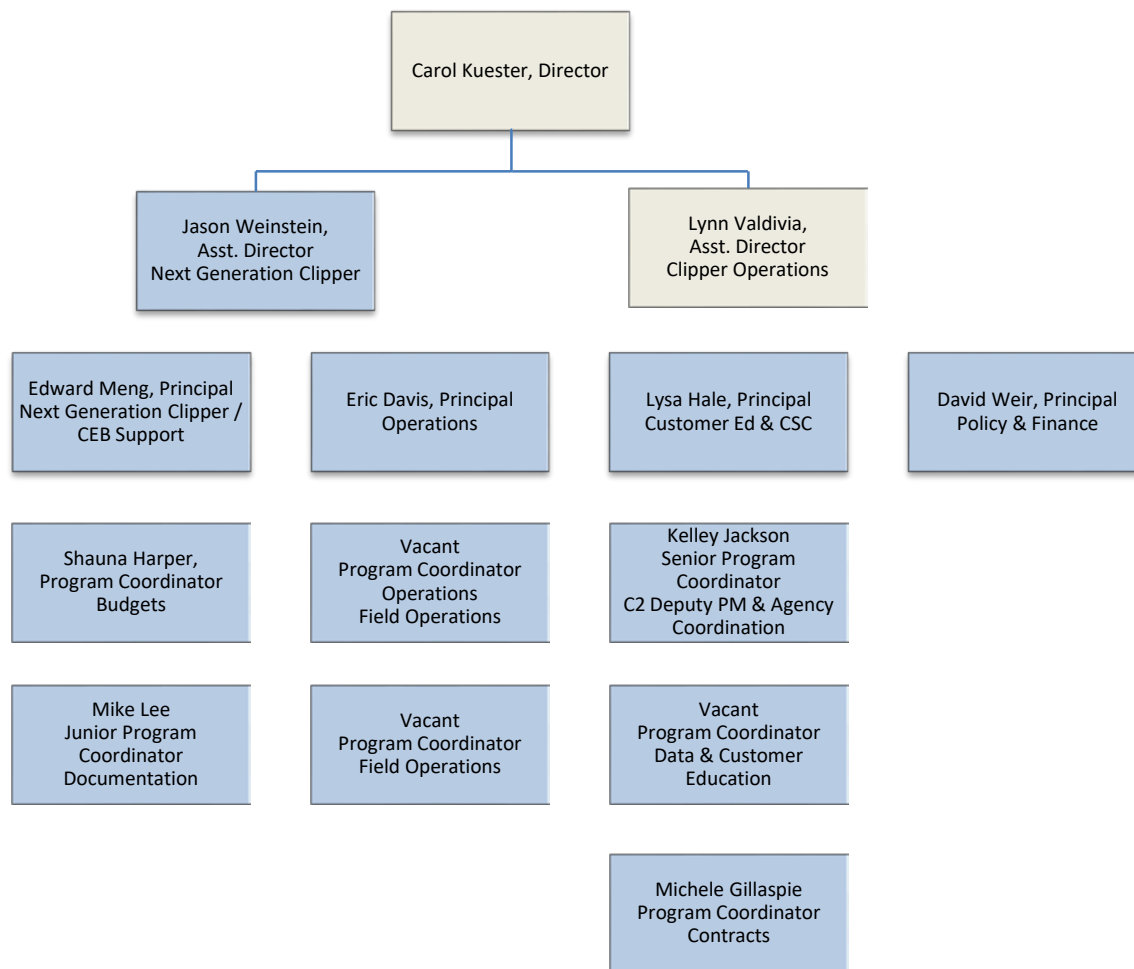
# Why Increased Staffing? New Work

## #3: Deliver Institutional Programs

- Means-based program delivery and operations
  - Establish and manage online eligibility verification process
  - Create, sustain relationships with social service agencies
  - Oversee operations of program
- Incorporate management of RTC Discount Card program, regional paratransit eligibility database
  - Update policies and procedures
  - Plan for MTC/Clipper to assume regional eligibility verifier contract
- Extend Clipper to paratransit



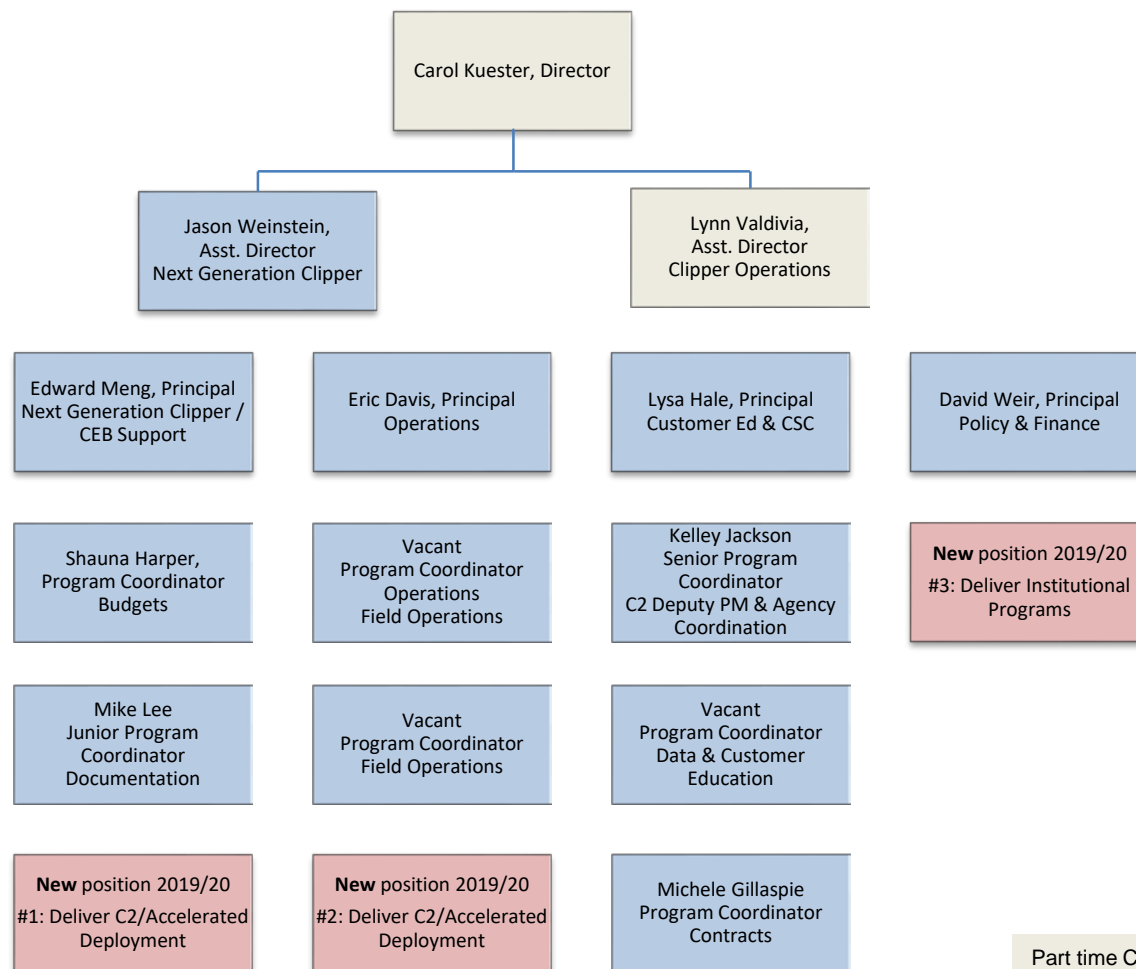
# MTC Clipper Staff Today



Part time Clipper staff = 2

Full time Clipper staff = 12

# MTC Clipper Staff Justification

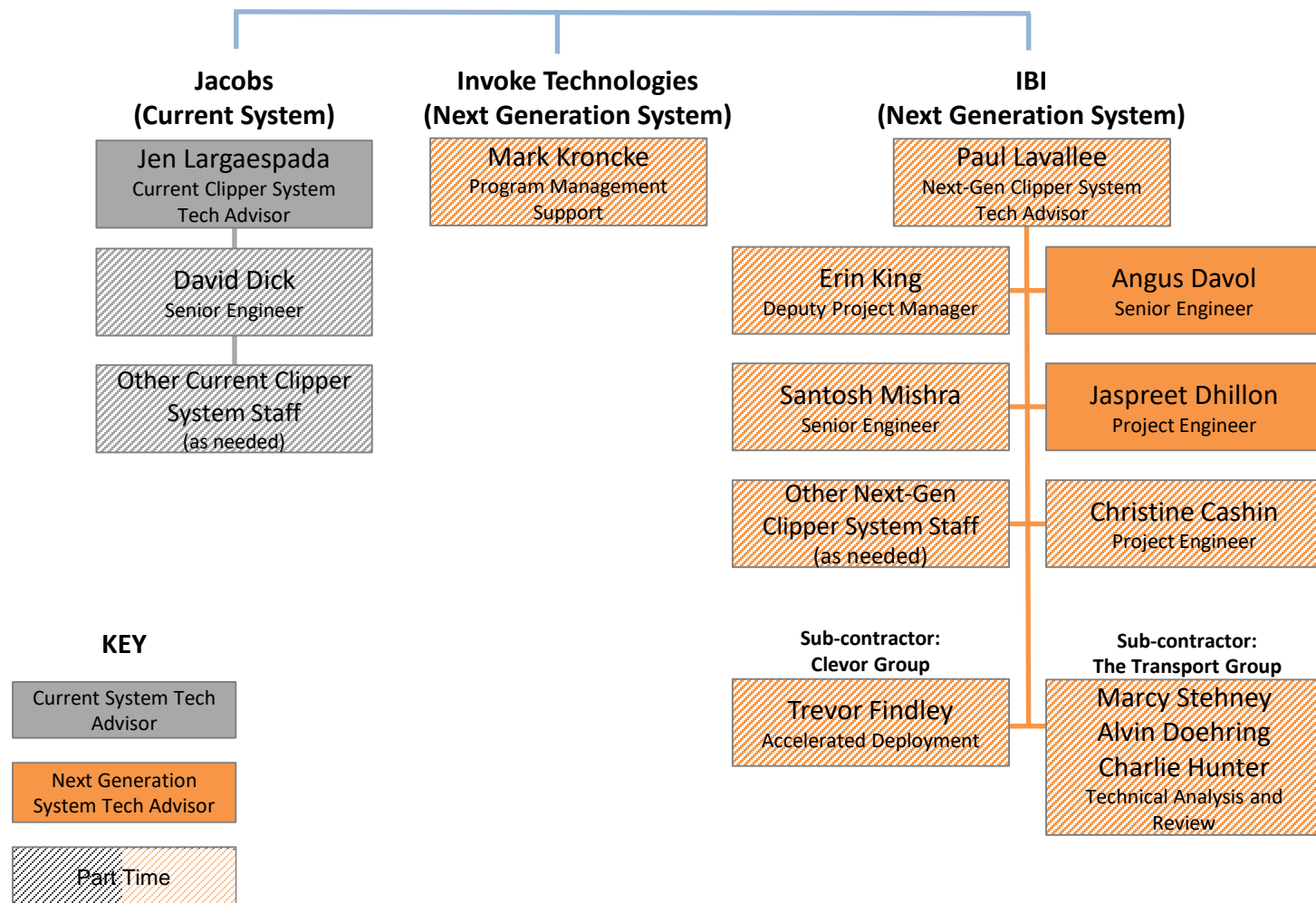


Part time Clipper staff = 2

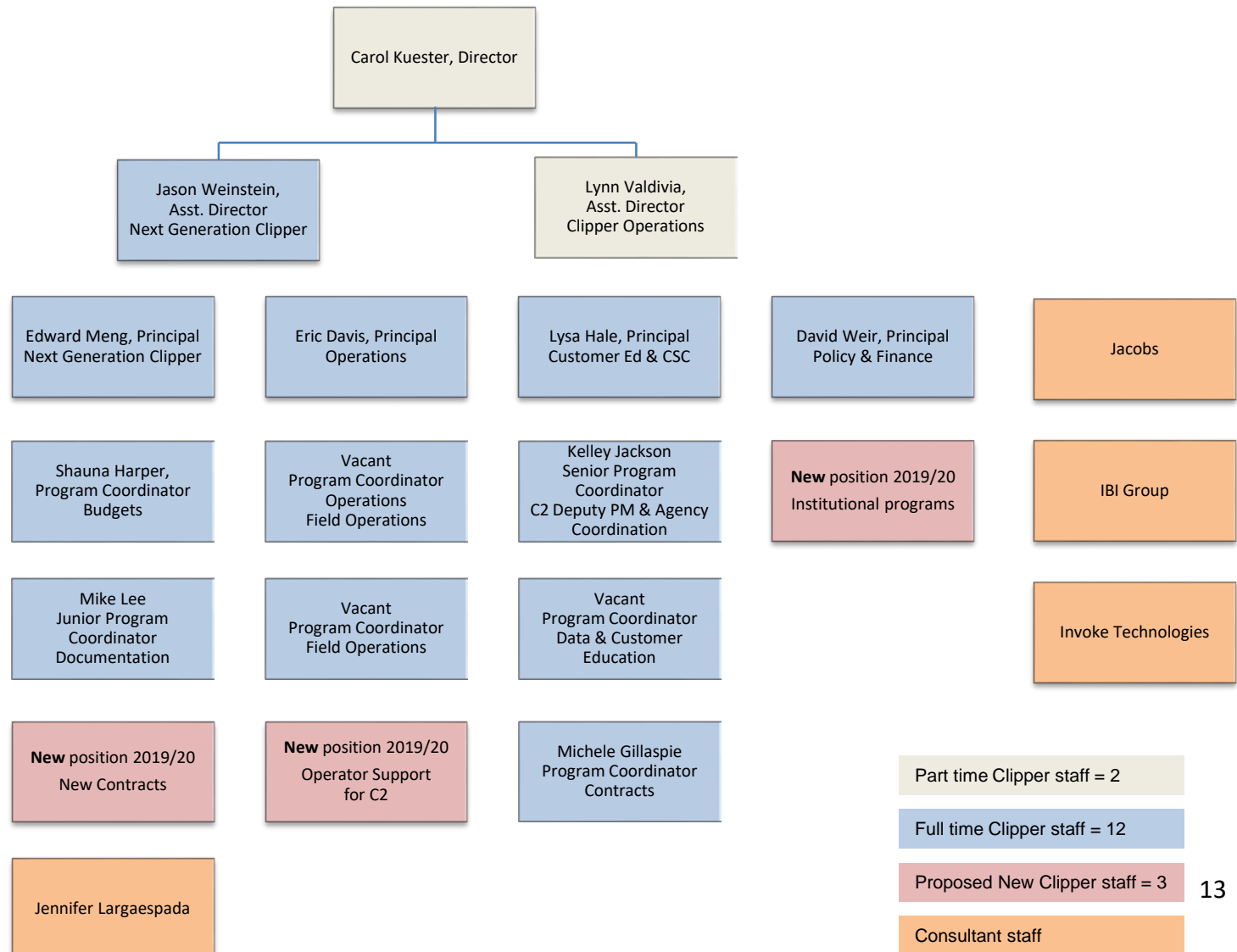
Full time Clipper staff = 12

Proposed New Clipper staff = 3

# Clipper Consultant Staff Chart



# MTC Clipper & Consultant Staff







# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

**File #:** 19-0044      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 1/7/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Regional Fare Coordination and Integration

Recent efforts on Regional Transit Fare Coordination and Integration.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4b\\_Regional Fare Coordination.pdf](#)

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

**Subject:**

Regional Fare Coordination and Integration

Recent efforts on Regional Transit Fare Coordination and Integration.

**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: February 19, 2019

FR: Carol Kuester

RE: Regional Fare Coordination and Integration

This memorandum is to update Board members on recent and upcoming MTC efforts related to regional transit fare coordination and integration.

**Transit Fare Integration Seminar**

In the fall of 2018, SPUR convened a number of transit agency board members and MTC Commissioners to discuss transit fare harmonization and integration in the Bay Area. At that meeting, many expressed an interest in learning more about fare integration in the Bay Area.

On February 8, 2019, MTC staff organized a charrette that included transit agency General Managers and Board Chairs as well as MTC Commissioners. The group worked together to develop a vision for a regional transit fare policy and how it can be used as a tool to enhance the customer experience, encourage transit ridership, and take advantage of the opportunity from the upcoming launch of the next generation Clipper® system.

MTC staff invited Martin Powell from the Greater Toronto Hamilton Area (GTHA) to speak to the group given the similarities between the Bay Area and the GTHA in size, population, and fare complexity. Mr. Powell discussed in great detail the Toronto region's efforts at regional fare integration and coordination.

MTC staff are currently working at synthesizing the materials and conclusions from the charrette and are developing a report that will be shared with the region within the next couple of weeks. We will report back to this Board about the status and outcome of regional fare coordination and integration and the region's efforts to develop a vision for fare coordination and integration.

---

Carol Kuester

**Attachment:**

- Attachment A: Transit Fare Policy Integration Seminar



# Transit Fare Policy Integration Seminar

**Friday, February 8, 2019**  
**1:00 – 3:30 p.m.**

**Port Commission Hearing Room**  
**San Francisco Ferry Building**





# Agenda

**Introductions**

**Why Look at Fares?**

**Bay Area Background**

**Guest Speaker: Martin Powell**

***Coffee Break***

**Co-creation Workshop**

**Next Steps**

**Public Comment**





An aerial photograph of a vast vineyard in a valley, with rolling hills in the background. The vineyard is divided into many rectangular plots, some of which are covered in dark, dense vines, while others appear to be bare or have different vegetation. A road runs through the middle of the vineyard, and there are some buildings and trees scattered throughout the landscape. The lighting suggests it might be late afternoon or early morning, with long shadows cast across the fields.

**Our goal today is  
to think big . . .**



**. . . about a vision for the future where  
our fare policies are designed to put the  
customer first, promote mobility, and  
remove barriers to using transit.**







**Metro**

11:39 AM INBOUND  
J 3, 4 L 8, 13 M 7, 21  
N 5, 12

9:27 AM DU  
J 14, 15 L 2  
N 3, 14

# The Price is Right for Bay Area Transit

## Can you match the transit trip and the fare?



# Fares Today

**9 different local bus fares on Clipper® from \$1.50 to \$2.50**

**Trips of the same distance and mode can vary dramatically in price**

**16 different discount rates for youth, 14 different rates for seniors**

**19,463 fare policy business rules are needed in Clipper® to implement our current system**

**Proposed Means-Based Discount of 20% on SFMTA, BART, Caltrain, Golden Gate**

# **Next Generation Clipper®**

**\$461 million contract awarded in Sept. 2018**


**More flexible, “account-based” system**

**Final go-ahead for system design in late 2021**

**We have an opportunity to save money and reduce complexity of Next Gen Clipper®**

**A coherent regional fare policy is one of five key findings from the 2017 Future of Clipper® Survey of 8,700+ users**





**70,000 trips on Clipper® Cards each day involve a direct transfer between two operators, despite the disincentives in the current system**

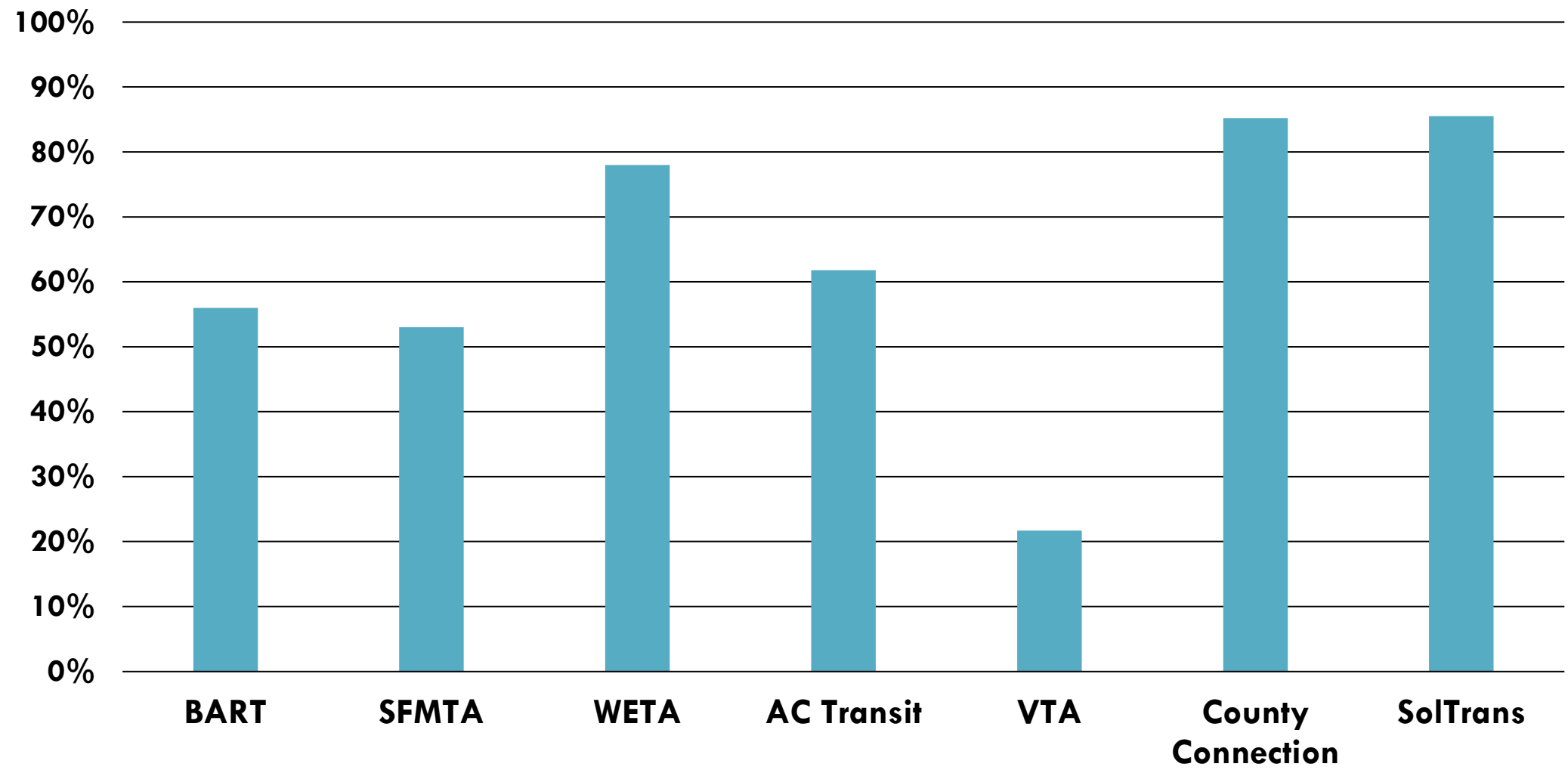


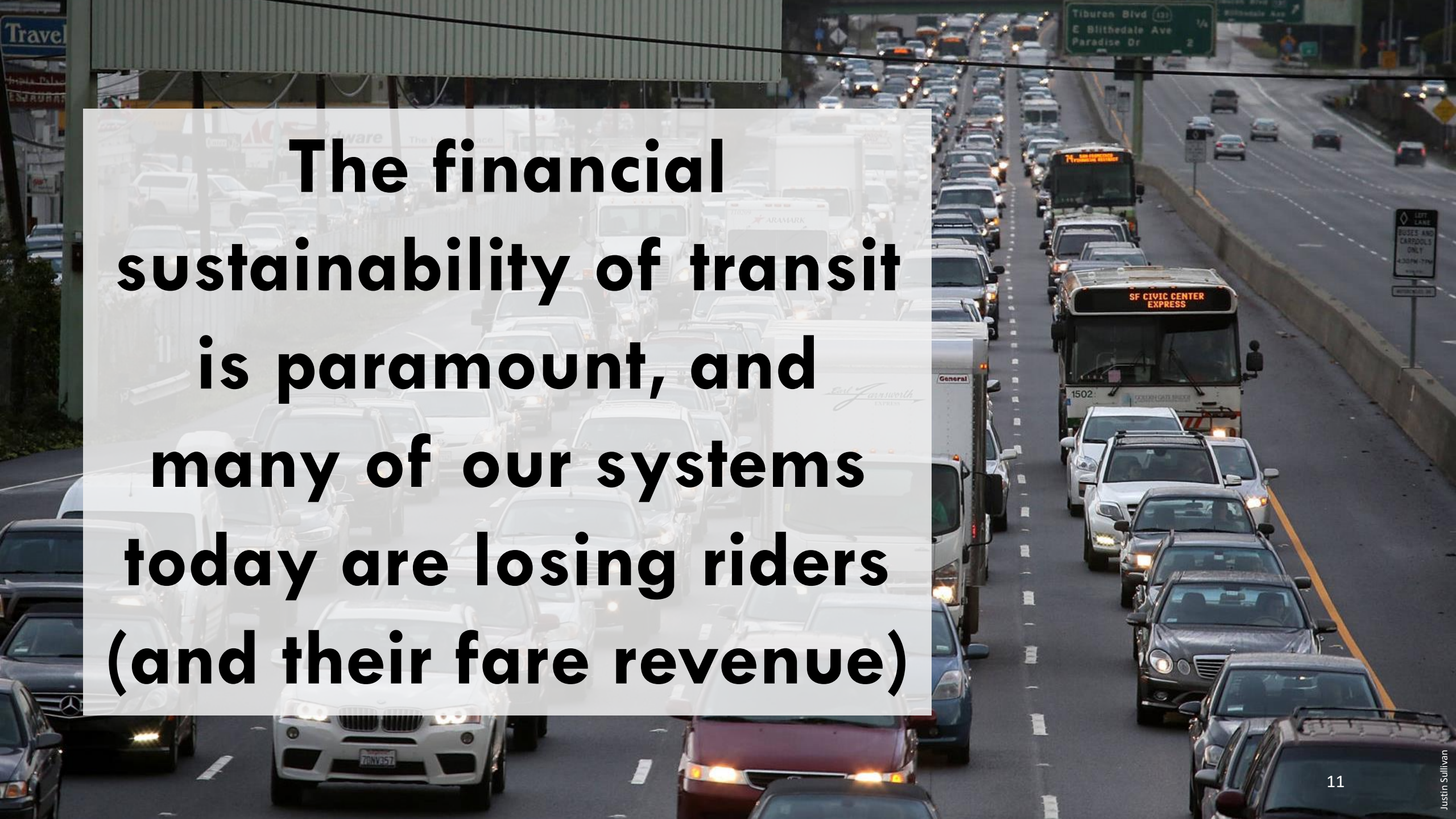


**More than half of Bay Area transit riders use their Clipper® Cards on more than one operator each month**



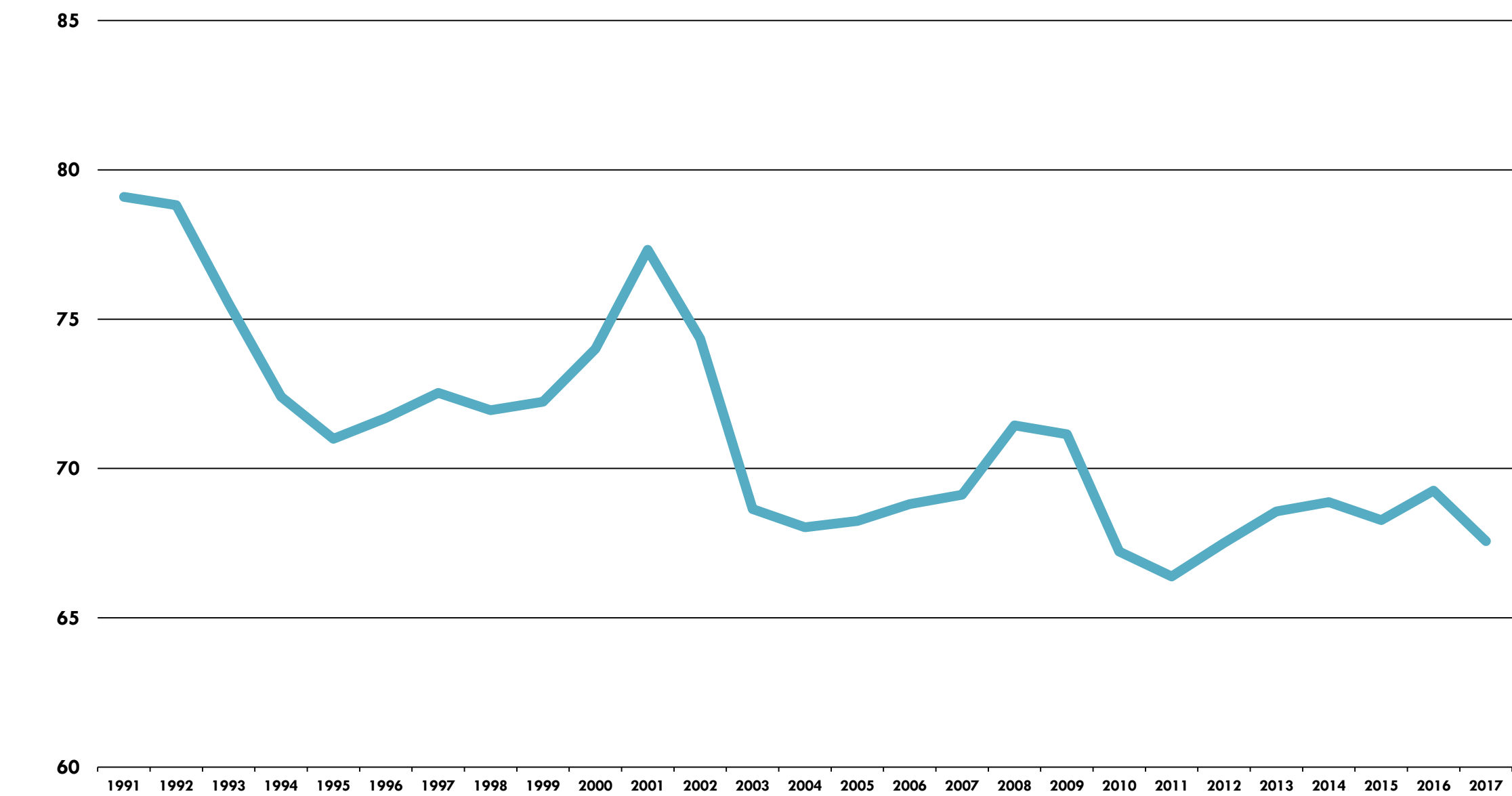
# % of Clipper® Cards Used on Listed Operator, Which Were Also Used on At Least One Other Operator





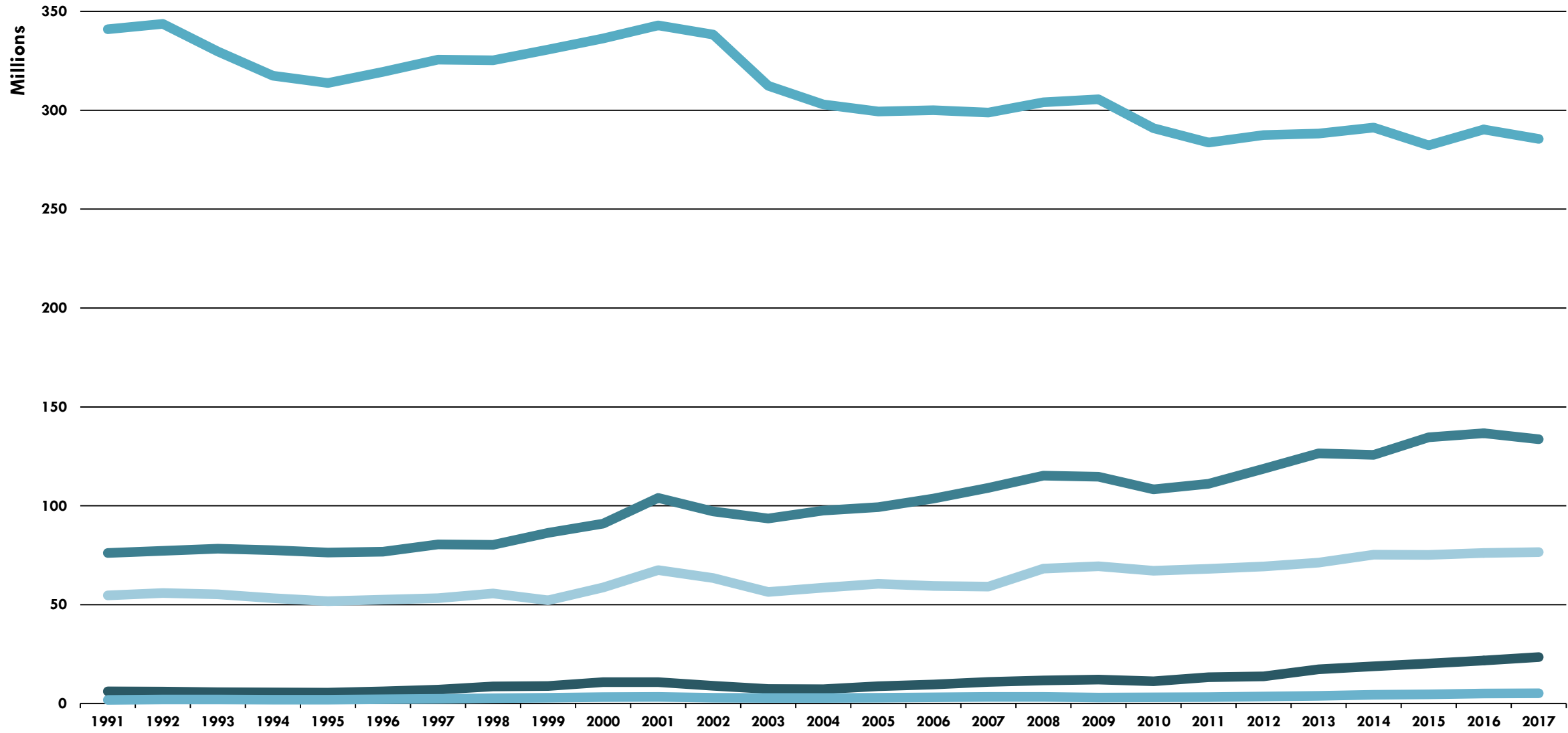
**The financial  
sustainability of transit  
is paramount, and  
many of our systems  
today are losing riders  
(and their fare revenue)**

# Total Annual Transit Ridership per Capita (all modes)

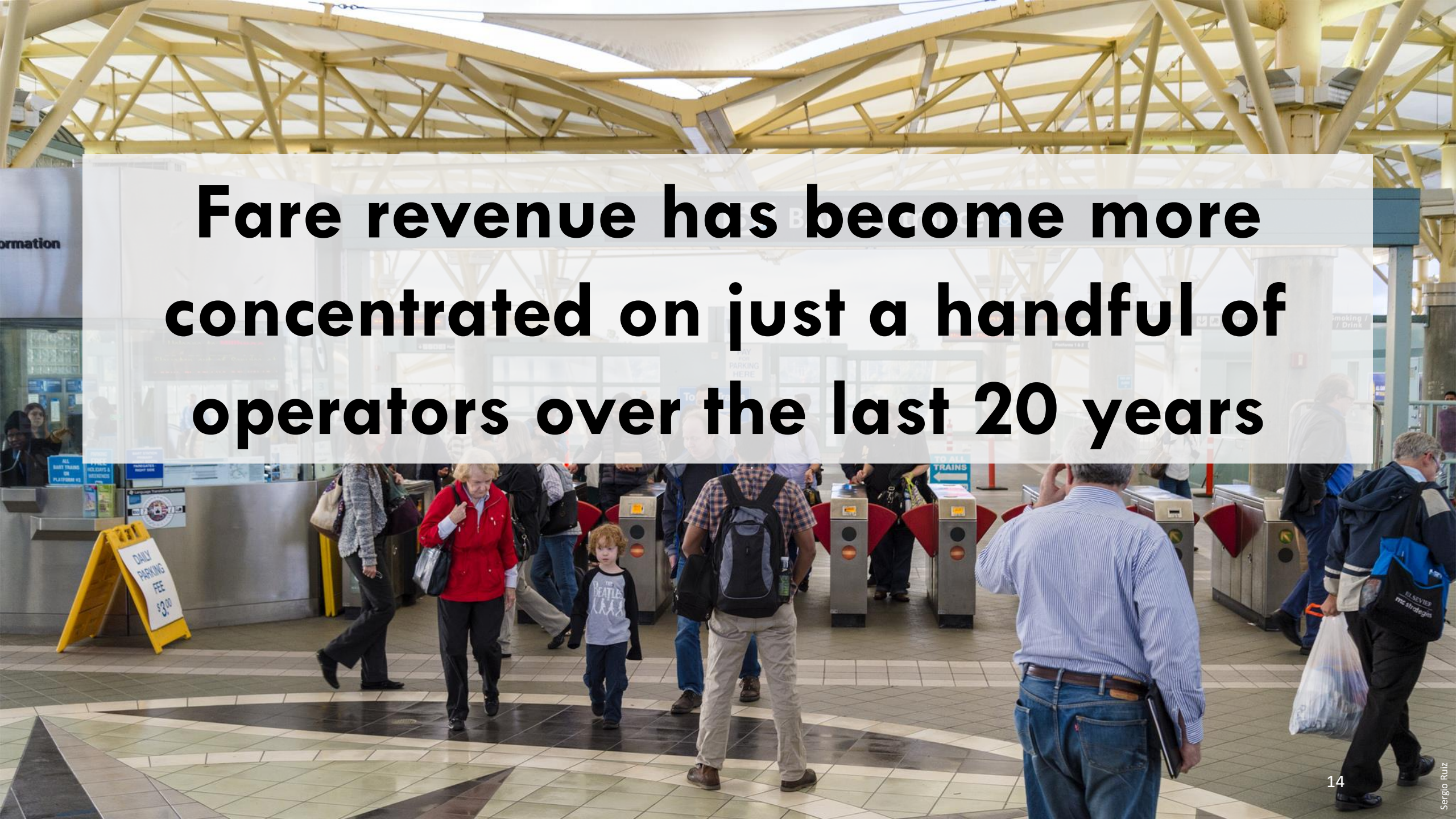


Source: NTD

# Total Annual Transit Ridership by Mode

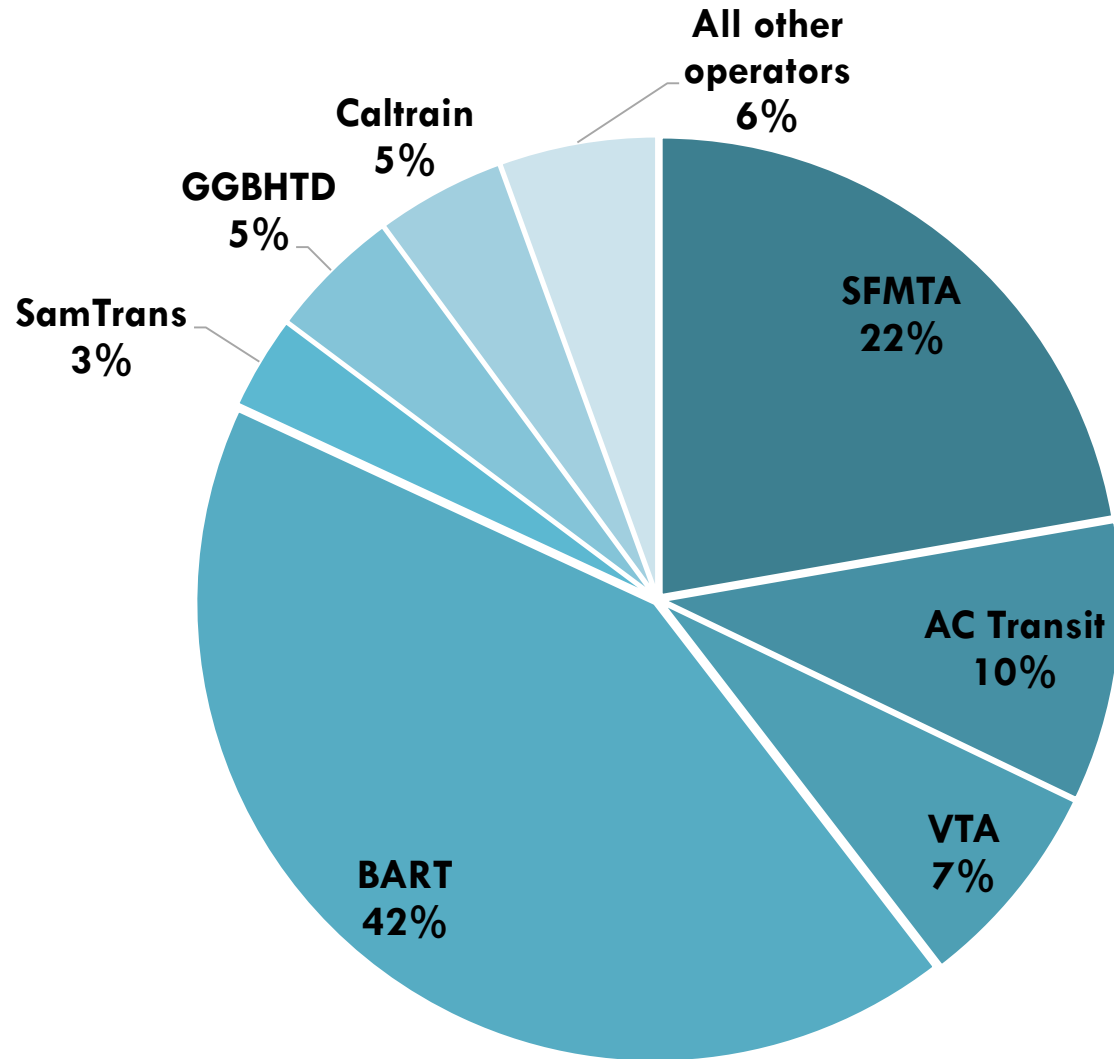




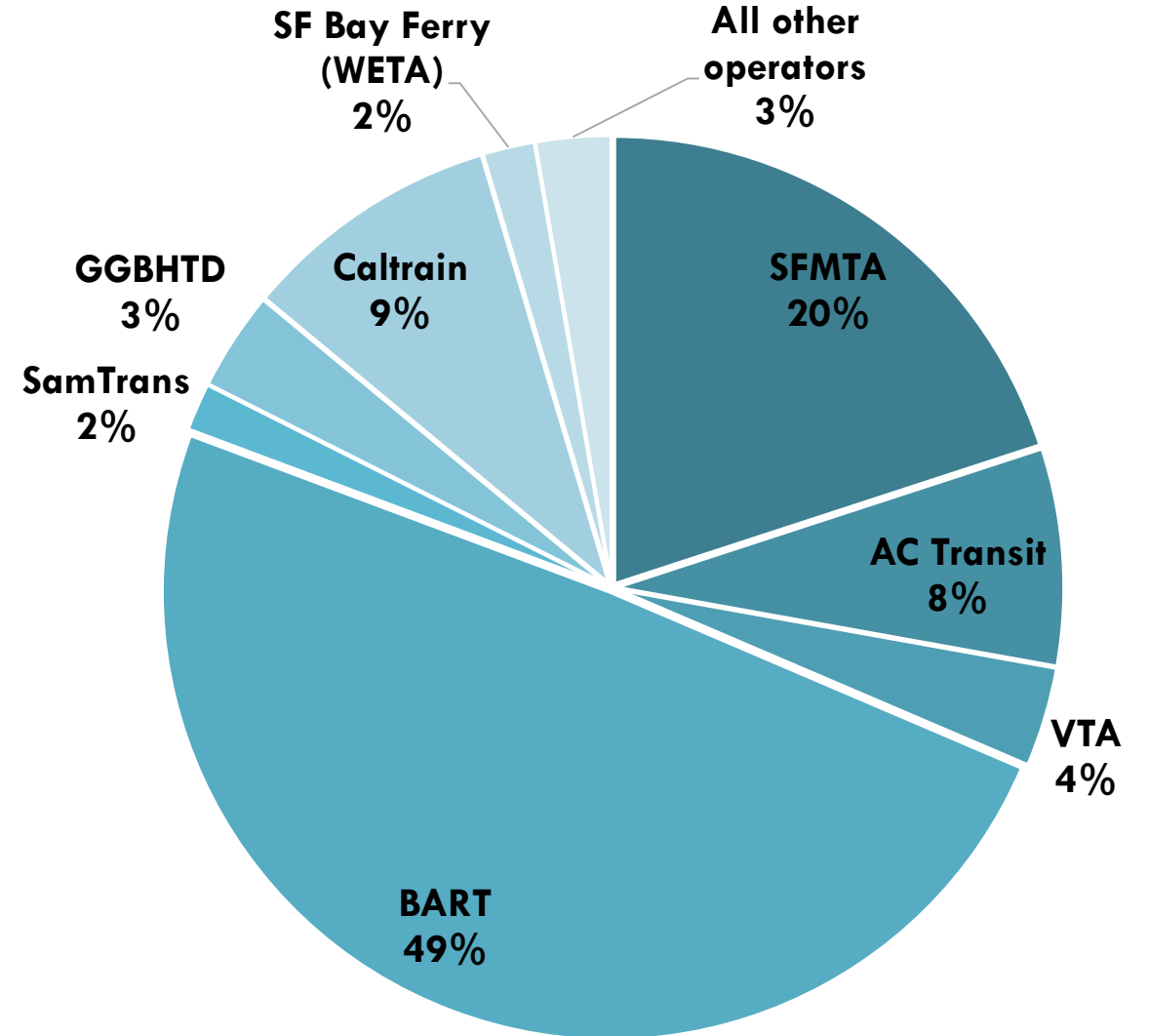
A photograph of a busy transit station. The scene is captured from a low angle, showing the lower half of several people walking through turnstiles. The turnstiles are silver with red flaps. The floor is made of light-colored square tiles. In the background, there's a yellow structural roof with a grid of beams. A sign on the left says "DAILY PARKING FEE \$3.00". A man in a red jacket and a woman with a backpack are prominent in the foreground. The text "Fare revenue has become more concentrated on just a handful of operators over the last 20 years" is overlaid in a large, bold, black font on a semi-transparent white background.

**Fare revenue has become more concentrated on just a handful of operators over the last 20 years**

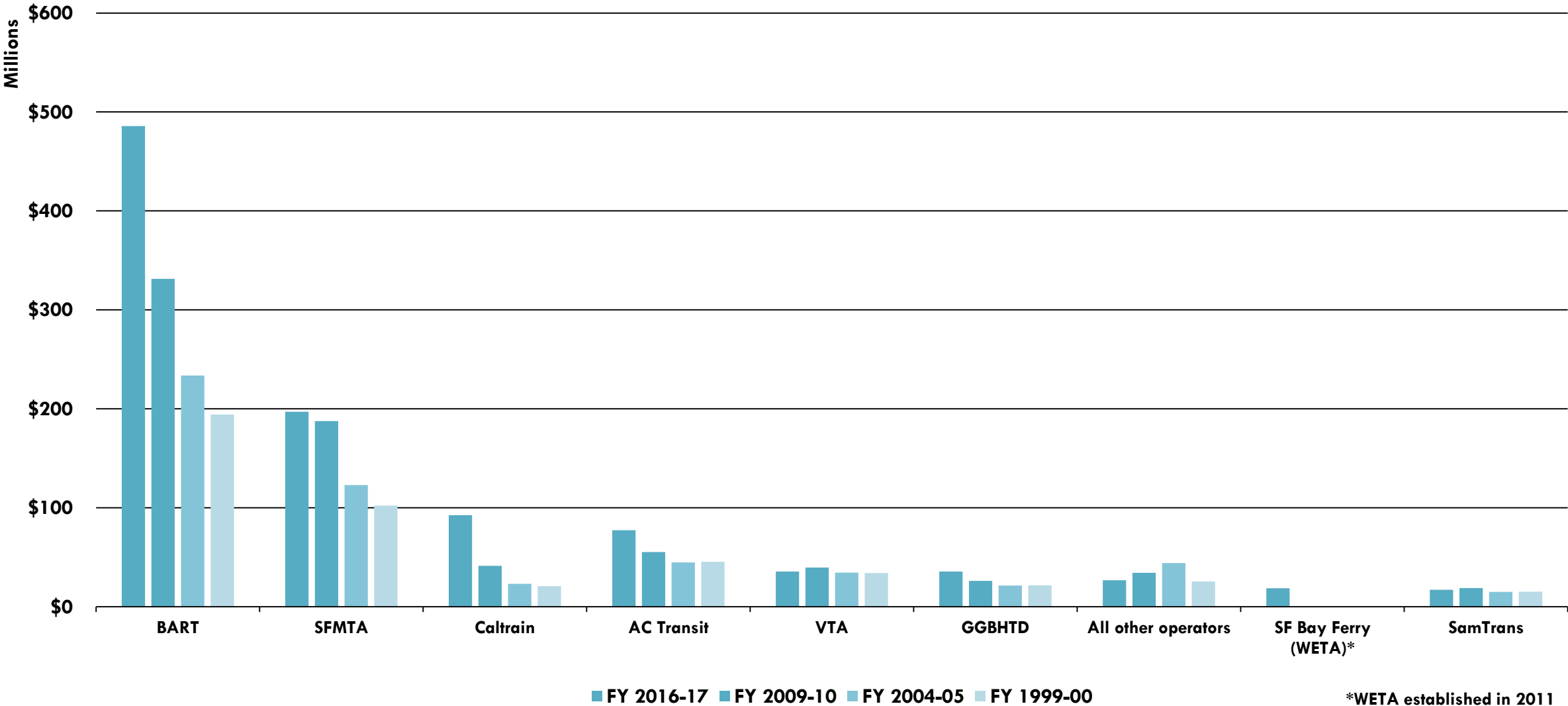
**Total Bay Area Fare Revenue, FY 1999-00**



**Total Bay Area Fare Revenue, FY 2016-17**



# Fare Revenue by Operator





# Components of Fare Policy

Local Transit Fare	Regional Transit Fare
Discounted Fares	
Temporal Pricing	
Transfers (time windows, fare credits)	
Loyalty Incentives	

# Fare Systems in the Bay Area

**Flat fare = 7 operators**

**Flat fare/premium hybrid = 9 operators**

**Zone-based = 5 operators**

**Distance-based = 1 operator**



# Accumulator Model

## East Bay Day Pass on CCCTA, ECCTA, WestCAT, LAVTA

### 1st Trip

Regular fare charged



### 2nd Trip

Fare capped at maximum



### 3rd+ Trip

Subsequent trips are free





A photograph of a Toronto GO train on tracks. The train is white with green accents and the number 353 is visible on its front. It is moving along several tracks that recede into the distance. In the background, the Toronto skyline is visible, including the CN Tower and several high-rise buildings. The sky is overcast. A semi-transparent white box with black text is overlaid on the upper half of the image.

# **Beyond the Bay: The Case for Fare Integration in Toronto**

**Martin Powell**





# Co-creation Workshop



# Next Steps

**Where do we want to be in six months?**

**What is the best way to work together to improve the fare experience for customers?**





**Public Comment**





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

**File #:** 19-0144      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 2/4/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Current Clipper® Program Update

Update on the current Clipper system.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4c\\_C1 Program Update.pdf](#)

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

**Subject:**

Current Clipper® Program Update

Update on the current Clipper system.

**Presenter:**

Lysa Hale

**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: February 19, 2019

FR: Carol Kuester

RE: Current Clipper® Program Update

### **Background**

Clipper staff last updated this Board on the ongoing overall work and projects related to the current Clipper system at the November 2018 meeting. This memorandum is to again provide updates on the current overall program.

### **Transactions and Sales**

The Clipper system is currently processing an average of 22 million transactions monthly, settling an average of \$52 million a month in revenue.

Despite high average volumes, Clipper experienced normal seasonal lows for December, and fee-based transactions were just below 20 million. However, the number of unique cards used grew to 1.18 million in December, a 15% increase from the previous December. Active card accounts increased to 2.8 million in December, a 35% increase from the previous year. We believe both of these increases are due in large part to the distribution of Clipper cards through BART ticket vending machines.

### **Clipper Card Dispensing**

BART has now dispensed 789,000 cards, and Clipper's market share on BART has grown to 82%. VTA completed retrofit of their ticket vending machines to dispense Clipper cards in January, and we expect to see increased use of Clipper on VTA. Caltrain will also be retrofitting 12 ticket vending machines to distribute and add value to Clipper cards. This work is expected to be completed in December 2019.

### **Other Implementation and Enhancement Projects**

Other noteworthy implementation and enhancement projects for the Clipper system include:

- Replacement of add value machines – successful replacement of four Clipper Add Value machines at the Temporary Transbay Terminal to make it more convenient for people to add value while the Salesforce Transit Center is closed. In the first month of service, the machines had approximately 3,000 transactions worth \$132,000 of revenue.
- Modernization of communications network – replacement of frame relay circuits at 121 sites, resulting in faster speeds and more dependable telecommunications, is now complete.
- SFMTA implementation of Clipper on the Central Subway – scheduled for completion in November 2019. Clipper equipment installation work began this month.
- San Francisco Bay Ferry New Richmond terminal and SF terminal expansion – installation of equipment in Richmond. This was completed in time for launch of the new Richmond-San Francisco service.

- Interest from the float account – investing funds in the float account in low-risk, interest-bearing money market account to generate additional revenue for the program. This strategy is projected to generate an additional \$1 million to \$1.5 million per year for the Clipper budget.
- Minimizing losses from chargebacks – developing a strategy to minimize money lost from chargebacks, demanded from credit card providers to make good on fraudulent or disputed transactions. The program lost more than \$1 million in 2018 due to chargebacks. We are already working on change orders to address this issue.
- For the status of other projects, please see the attached Current Clipper Program Update and the Clipper Master Schedule.



---

Carol Kuester

**Attachment:**

- Attachment A: Current Clipper Program Update
- Attachment B: Clipper Master Schedule



# Clipper Update

January 2019



## Table of Contents

System Performance	2
System Implementation	7
Customer Education	8
Value Distribution	9
Financial Information	10
Contractor Performance	11

## A Message from Carol Kuester, Director, MTC Electronic Payments

I'm excited to announce that VTA ticket machines now dispense Clipper cards. Add them to the network of ticket machines that already includes Muni, BART, Golden Gate Ferry and SMART, and transit riders now have many options for getting a card at a station.

We were curious to see how many people would use the recently reinstalled Clipper Add Value machines at the Temporary Transbay Terminal, and we were happy to see these serve a need, with approximately 3,000 transactions worth \$132,000 of revenue from December 10 to January 15. Three-fourths of the transactions were made with a credit or debit card. Almost all of the transactions were to add cash value, with fewer than 100 passes sold during that period. We plan to leave the AVMs in place until after the Salesforce Transit Center has been operational for several weeks once it reopens.

Note the huge increases in active cards and unique cards used below. Active cards increased 35%, and unique cards used increased 15% between December 2017 and December 2018 - increases we attribute to card availability at BART stations as well as their paper ticket surcharge.

I want to take a moment to thank John Yen of BART, who has worked tirelessly for years to make Clipper a better system. We will miss his contributions as he moves on to a new opportunity.

If you have program questions, please contact your Clipper liaison. You can also reach me at 415.778.5253 or by email at [ckuester@bayareametro.gov](mailto:ckuester@bayareametro.gov).

**Table 1: Summary of System Usage**

	Last Month December 2018 (31 days)	% Change From November 2018 (30 days)	% Change from December 2017 (31 days)
<b>Transaction Volume</b>			
Average Weekday Ridership <sup>1</sup>	714,772	-6.0%	4.8%
Fee-Generating Transactions <sup>2</sup>	19,959,572	-4.8%	4.3%
Unique Cards Used	1,181,085	2.6%	15.1%
Active Card Accounts	2,799,550	0.5%	35.2%
Settled Transit Operator Revenue	\$46,861,286	-6.5%	10.9%
<b>Call Volume</b>			
Customer Service Representative Calls	21,695	-4.8%	-7.2%
<b>Website Traffic<sup>3</sup></b>			
Unique Visitors – Standard and Mobile	198,035	-1.9%	5.3%
Website Visits – Standard and Mobile	299,367	-3.3%	8.8%

<sup>1</sup> Includes average daily number of boardings, including transfers but excluding some Caltrain monthly pass trips (Caltrain only requires monthly pass customers to tag their cards once at the beginning of each month).

<sup>2</sup> Includes single-tag fare payments, BART and Caltrain exits, Golden Gate Transit entries, add-value transactions, opt-out purse refunds and pass use, including institutional passes. Does not include transfers or transactions where fee value is \$0 (e.g., issuance of free cards, zero-value tags in dual-tag systems, etc.).

<sup>3</sup> We are temporarily unable to provide a breakdown between desktop and mobile usage.

## System Performance

Figure 1: Transactions<sup>4</sup>

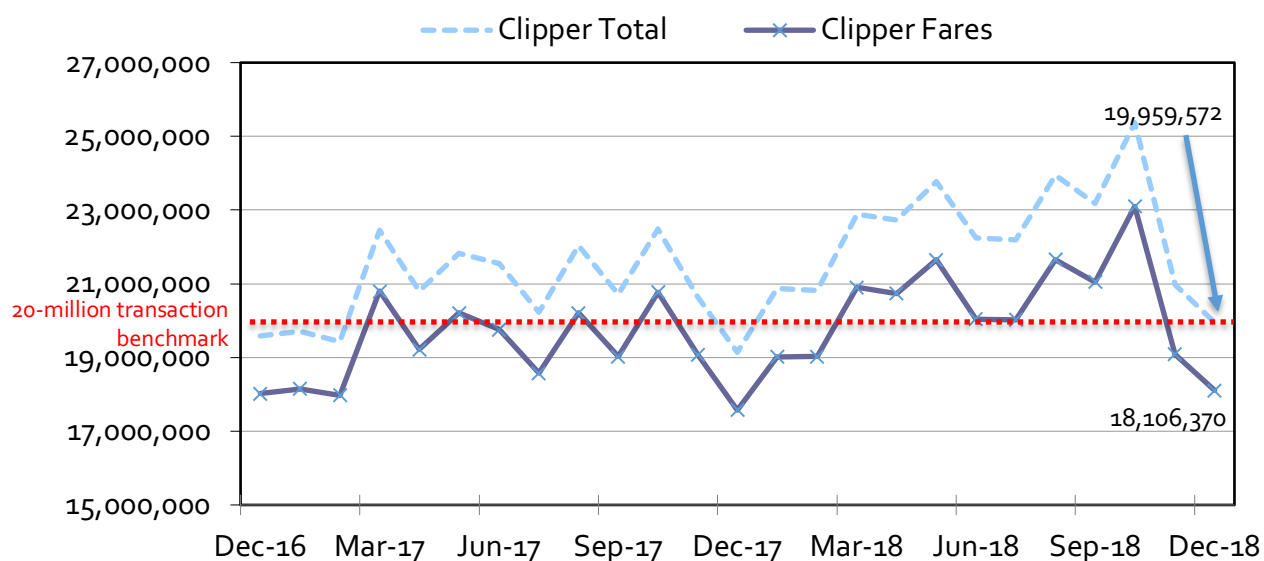
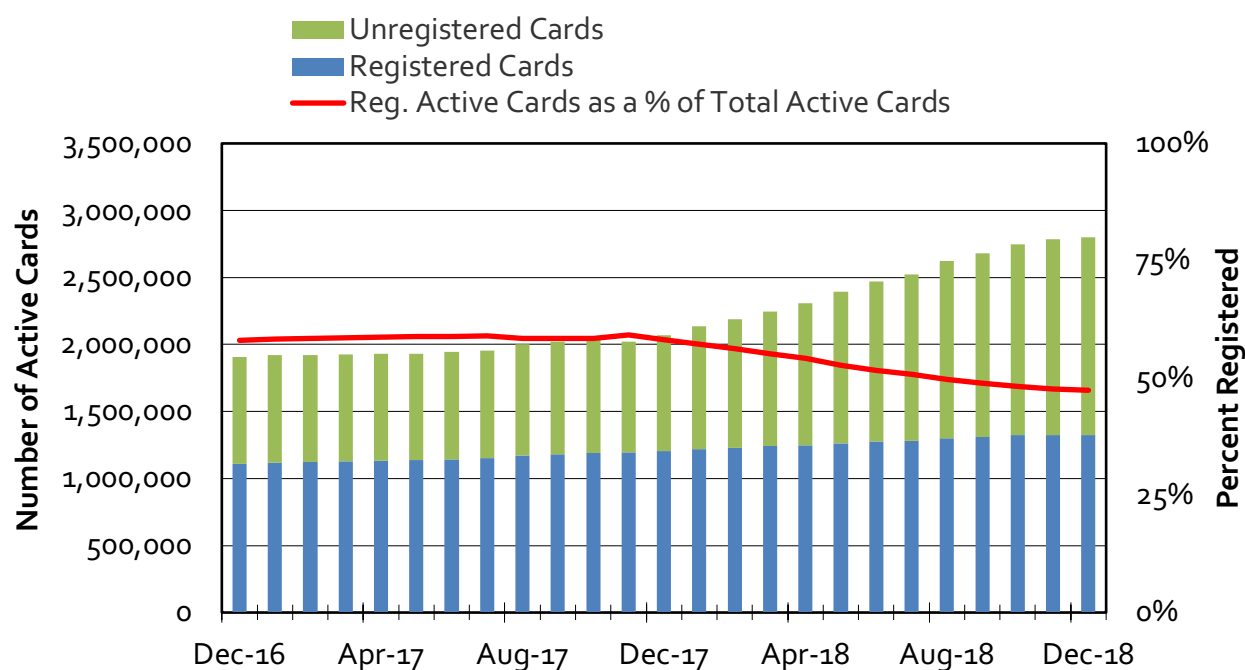


Figure 2: Number of Active Cards<sup>5</sup> in Circulation per Month



<sup>4</sup> "Clipper Total" is fare-payment and add-value transactions that count toward the 20 million-transaction contract benchmark. Sudden fluctuations may be attributable to the number of days in a given month.

<sup>5</sup> Active cards are those that have been used at least once within the last 12 months.

Table 2: Monthly Market Share<sup>6</sup>

	Monthly Clipper Boardings	Clipper Market Share	
	October 2018	October 2018	October 2017
AC Transit	2,267,070	41.9%	44.7%
BART <sup>7</sup>	7,633,812	82.6%	68.8%
Caltrain <sup>8</sup>	1,087,199	63.1%	60.4%
Golden Gate Ferry <sup>9</sup>	219,669	99.3%	95.6%
Golden Gate Transit <sup>10</sup>	221,381	49.1%	44.8%
Muni <sup>11</sup>	8,860,266	44.9%	42.0%
SamTrans	459,460	43.8%	38.9%
San Francisco Bay Ferry	171,449	61.6%	56.9%
SMART	53,689	82.0%	54.7%
Union City Transit	14,198	50.4%	30.5%
VTA	1,575,313	46.3%	46.9%
Napa/Solano Group	53,863	14.7%	12.3%
City Coach	594	1.5%	1.0%
FAST	18,878	22.2%	18.8%
SolTrans	31,486	21.2%	19.8%
Vine Transit	2,905	3.1%	1.2%
East Bay Group	206,744	26.0%	21.5%
County Connection	88,635	27.2%	20.2%
Tri Delta Transit	22,801	12.7%	16.6%
WestCAT	49,053	41.1%	37.6%
Wheels	46,255	27.0%	19.5%
Sonoma/101 Group	14,149	5.0%	2.9%
Petaluma Transit	2,189	6.3%	4.9%
Santa Rosa CityBus	7,896	4.6%	2.8%
Sonoma Co. Transit	4,064	5.2%	2.4%

<sup>6</sup> Not all data is available for November 2018, so this table is the same as the previous month. Next month's report will include updated data.

<sup>7</sup> Monthly market share on BART is calculated using monthly BART total exits by ticket type, which is equivalent to number of linked trips per month.

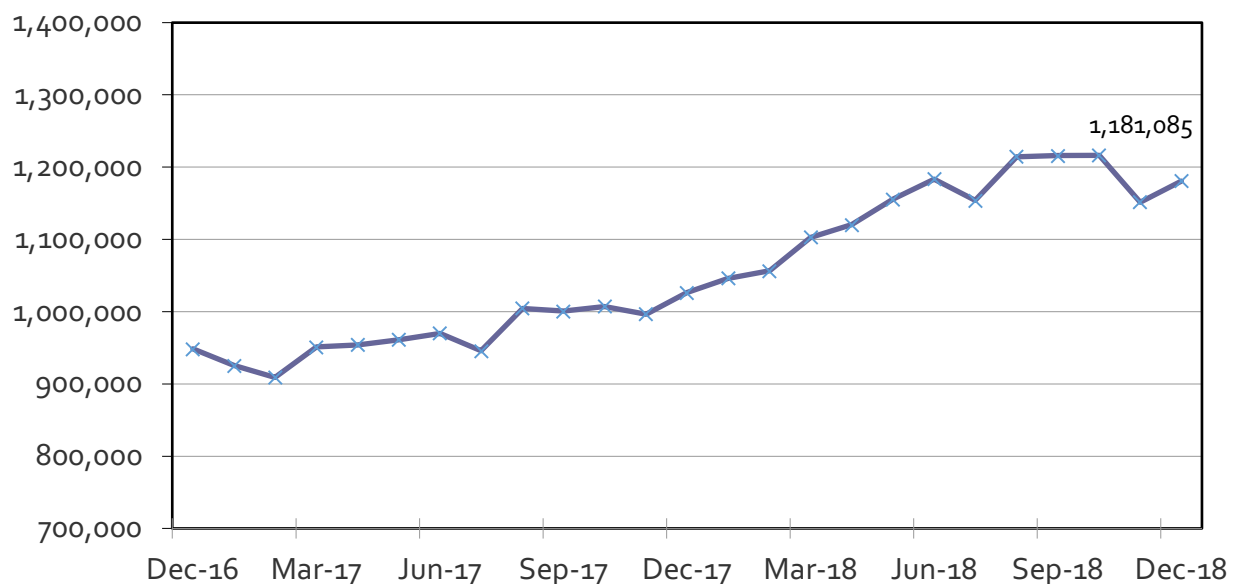
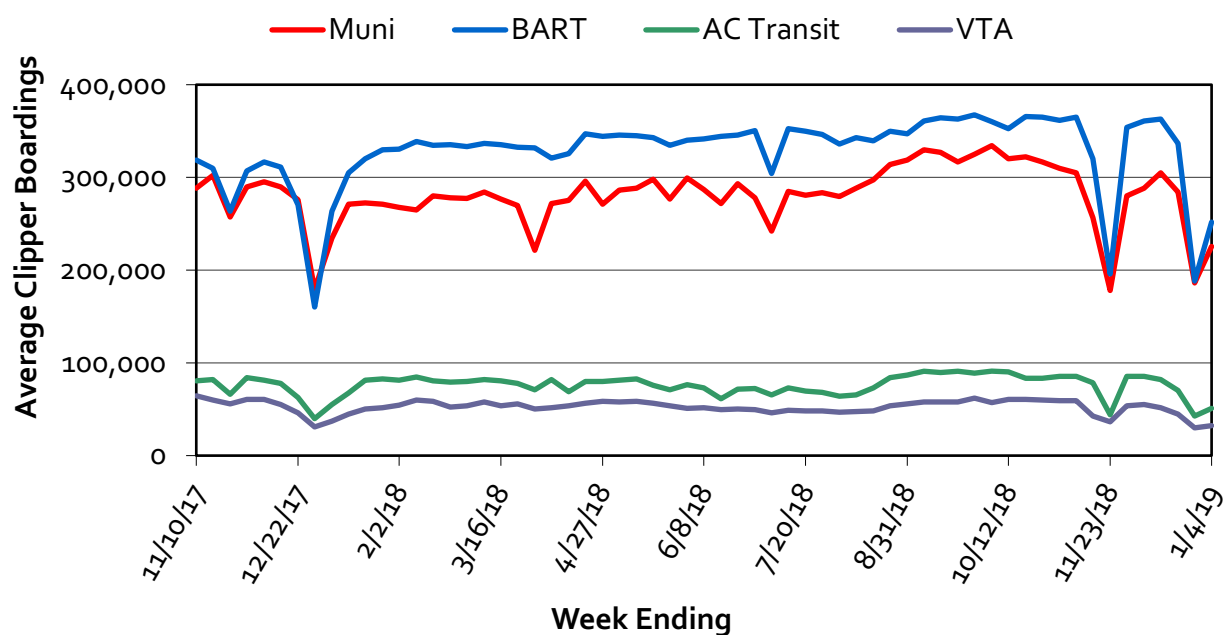
<sup>8</sup> Calculation of market share on Caltrain assumes that monthly pass holders board Caltrain 1.75 times a day per weekday. Caltrain sold 13,615 calendar passes during the October 2018 pass vending window.

<sup>9</sup> Includes payment with Clipper-compatible limited-use tickets.

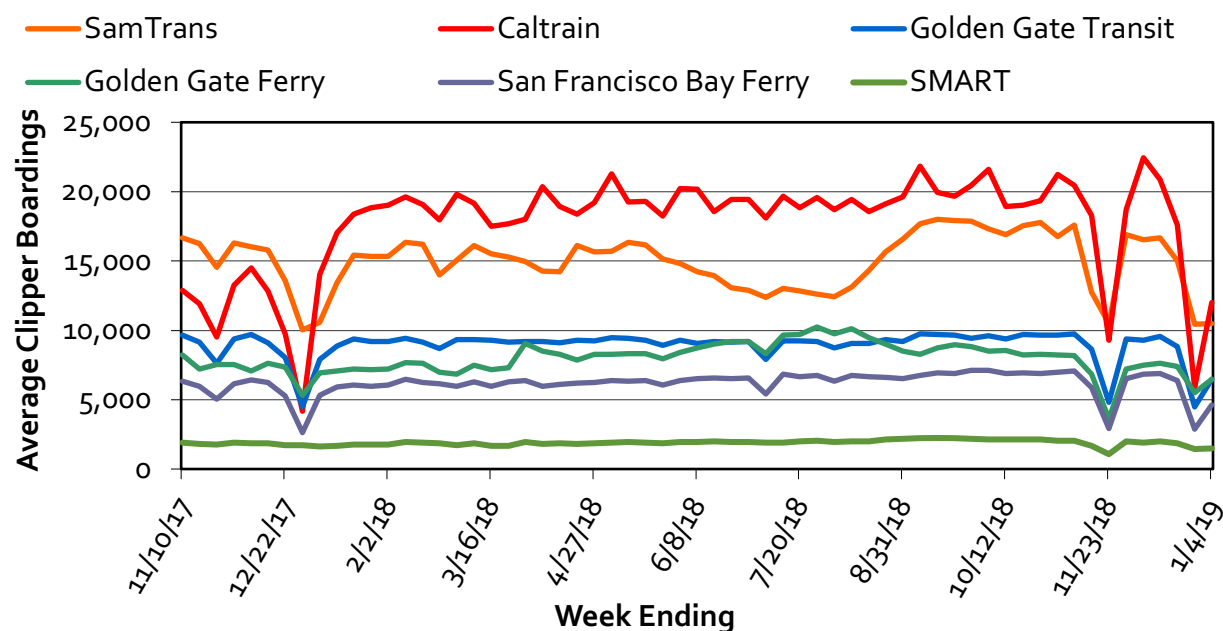
<sup>10</sup> Includes boardings on Marin Transit routes, which currently operate under the umbrella of Golden Gate Transit's Clipper business rules.

<sup>11</sup> Includes payment with Clipper-compatible limited-use tickets.

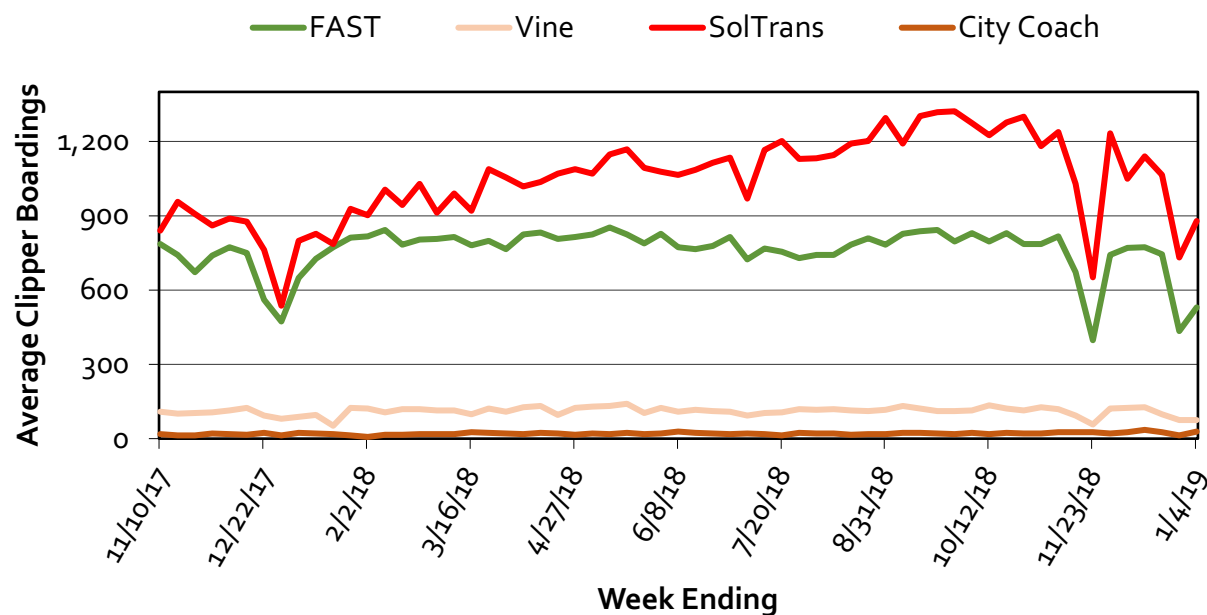


Figure 3: Unique Cards Used by Month<sup>12</sup>Figure 4: Average Weekday Ridership – SFMTA<sup>13</sup>, BART, AC Transit and VTA<sup>12</sup> Unique Clipper cards used in a specific month<sup>13</sup> Delays in settlement specific to SFMTA may affect Muni transaction reporting.

**Figure 5: Average Weekday Ridership<sup>14</sup> – SamTrans, Caltrain<sup>15</sup>, Golden Gate Bus/Ferry, San Francisco Bay Ferry and SMART**



**Figure 6: Average Weekday Ridership<sup>16</sup> – FAST, VINE, SolTrans, City Coach**



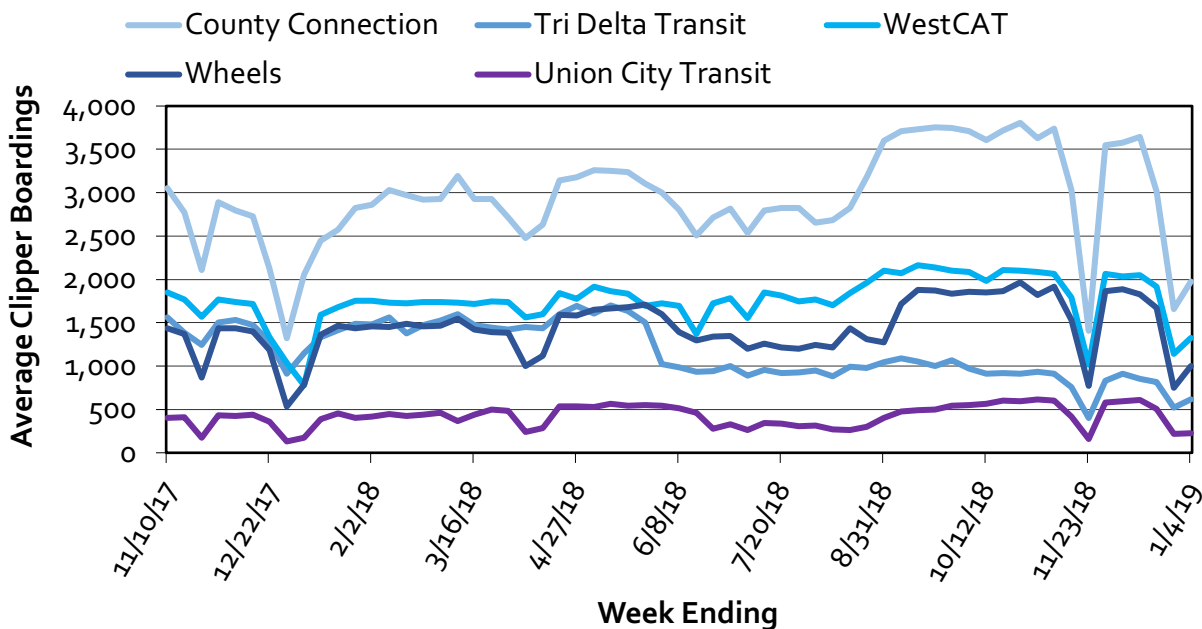
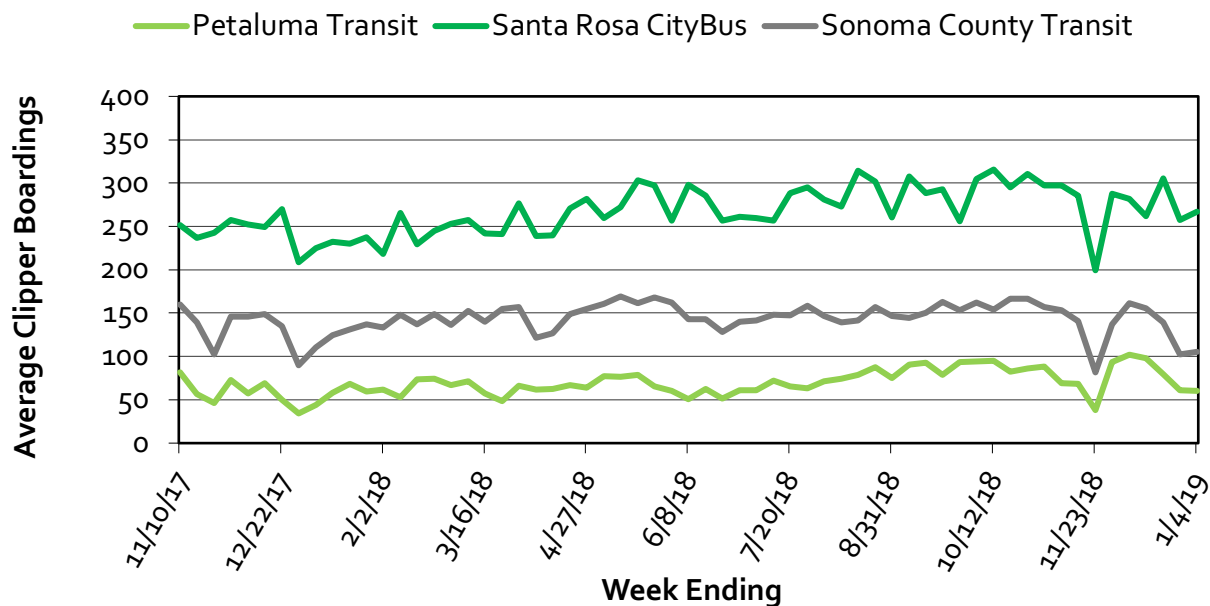
<sup>14</sup> Drops in October ridership are likely attributable to the North Bay wildfires and operators offering free services.

<sup>15</sup> Spikes in Caltrain boardings at the beginning of the month are due to Caltrain monthly pass holders' only needing to tag on and off during their first ride of the month to load their passes.

<sup>16</sup> Drops in October ridership are likely attributable to the North Bay wildfires and operators offering free services.



Figure 7: Average Weekday Ridership – East Bay and Union City Transit

Figure 8: Average Weekday Ridership – Sonoma/101 Corridor<sup>17</sup>

<sup>17</sup> Drops in October ridership are likely attributable to the North Bay wildfires and operators offering free services.

## System Implementation

**Table 3: Expansion and Enhancement Highlights**

Operator	Description/Completion Date	Status
<b>VTA</b>	Ticket machine retrofit (completed)	Retrofit work was completed this month. All ticket machines can now dispense Clipper cards.
<b>BART</b>	Implementation of Clipper at extension stations (TBD)	Work is on hold pending completion of operator work.
<b>AC Transit</b>	Driver console integration (2019)	Software deployment begins this month, with lab upgrade and testing starting on January 30.
<b>Golden Gate Transit (ferry)</b>	Installation of Clipper equipment at Tiburon terminal (2018)	Golden Gate Transit's review of the change notice for this work is on hold.
<b>SFMTA</b>	Implementation of Clipper on the Central Subway (November 2019)	Installation work will begin in February 2019.
<b>SMART</b>	Implementation of Clipper on SMART, Phase 2 (2019)	Work is on hold pending completion of operator work.
<b>AC Transit</b>	Implementation of Clipper on Bus Rapid Transit service (2019)	MTC will delay issuing notice to proceed to Cubic until mid-2019, per operator request.
<b>San Francisco Bay Ferry</b>	New Richmond terminal and SF terminal expansion (2019)	Card readers have been installed at Gates F and G. Card readers were installed at the Richmond Ferry Terminal in time for start of the new ferry service on January 10. Cubic will complete additional work on an existing gate in San Francisco later next year.
<b>Caltrain</b>	Caltrain Ticket Machine Integration (2019)	MTC is finalizing a funding agreement and drafting a change order.

## Customer Education

Phase 2 of the “Clipper Works for You” campaign has expanded. Originally planned to target Golden Gate Transit bus riders with messaging about cost savings, the campaign will also target County Connection customers with a similar message, focusing on new fare incentives and Clipper-only transfers. Both parts of the campaign will use transit advertising, digital advertising and Spanish print ads.

We reached out to 170,000 BART riders about the agency’s early morning service changes beginning in February; we will continue to explain to Clipper customers what the changes could mean for them through our website and social media.

We also provided support for the Richmond Ferry launch with seven outreach events, where we distributed 91 adult cards and 4 senior cards and assisted hundreds of passengers with using Clipper on the ferry, including the need to tag on and off.

**Table 4: Customer Education Activities, January-March 2019**

	January	February	March	April
<b>Advertising</b>	Planning for Phase 2 of campaign	Development of Phase 2 creative	Phase 2 campaign launch	Planning for Phase 3 of campaign
<b>Outreach</b>	Training Richmond Ferry support	Planning for Phase 2 of campaign	Phase 2 campaign support	
<b>Public Engagement</b>	Ongoing support for next generation of Clipper	—————>	—————>	—————>
<b>Policy/ Customer Information</b>	Website improvements	—————>	—————>	—————>
	Notify customers of fare changes	—————>	—————>	—————>
	RTC brochure update	—————>	—————>	
	Amex acceptance	—————>		
	BART early morning service changes	—————>		
<b>Other</b>	SF Bay Ferry pole wraps			
	Card sales through BART	—————>		
	Planning for FY 2019-20	—————>		

## Value Distribution

Figure 9: Settled Clipper Sales by Channel

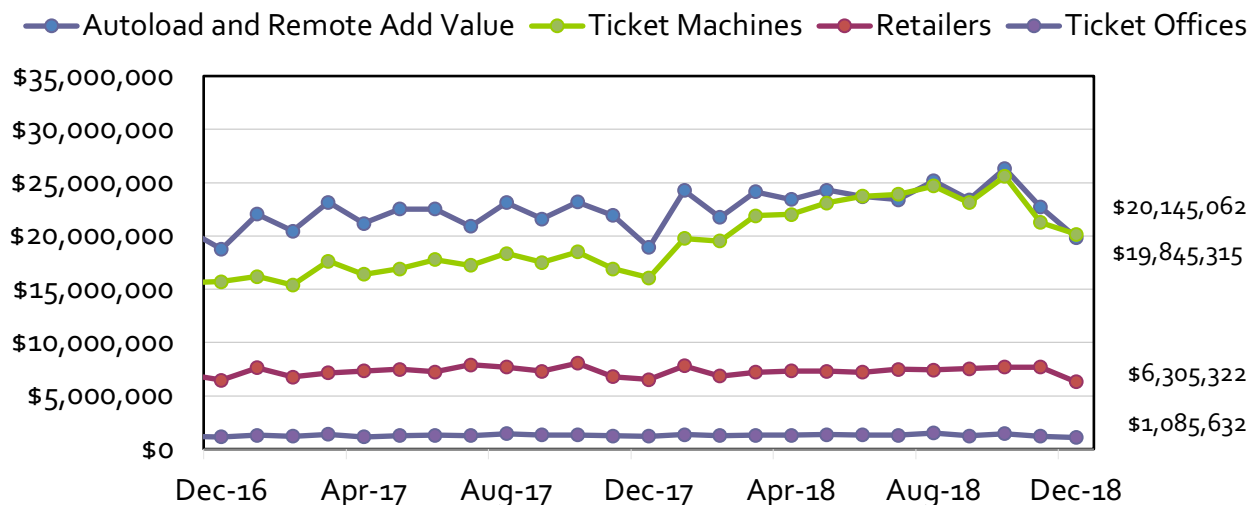


Figure 10: Order Value and Unique Patrons by Employer Program per Month

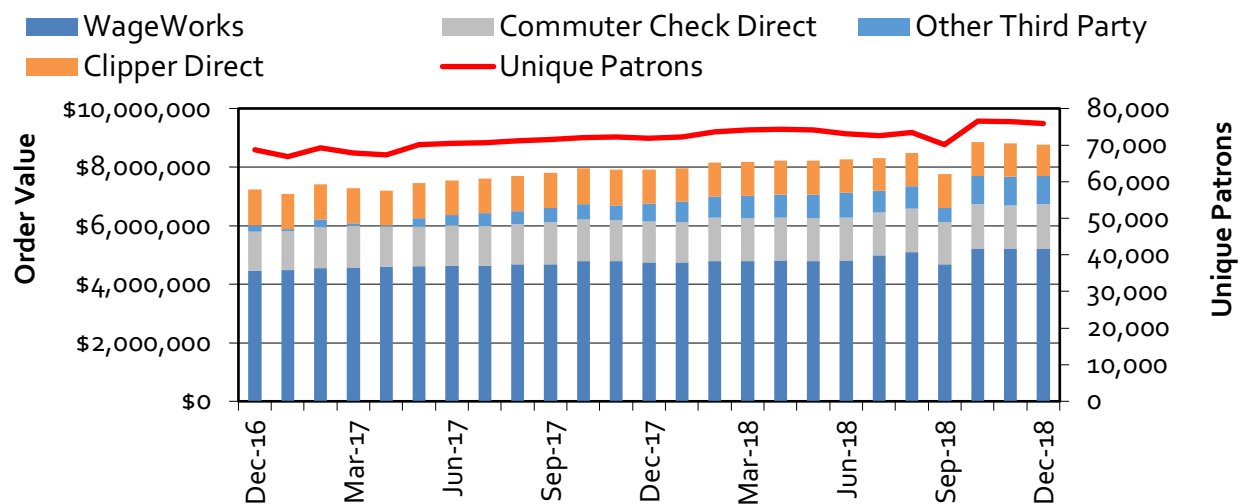
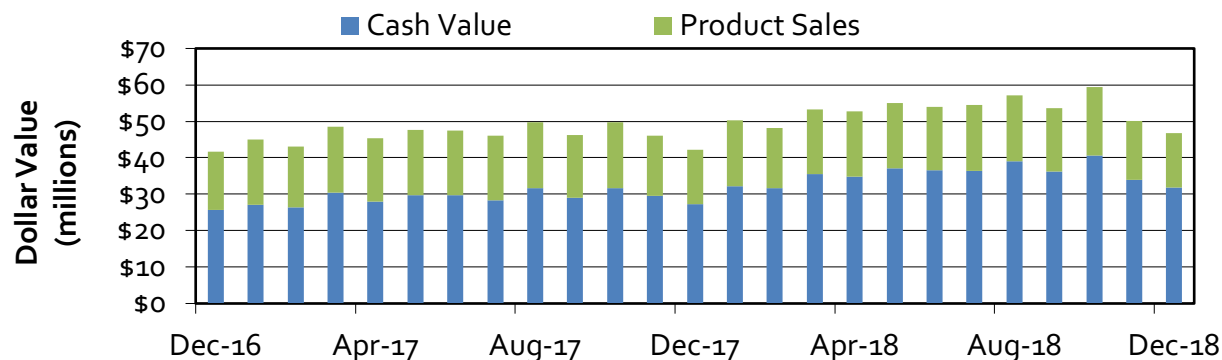


Figure 11: Product and Cash Value Sales per Month



## Financial Information

**Table 5: Revenue by Operator Per Month, Previous Six Months**

Operator	Jul 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018
AC Transit	\$2,428,120	\$2,945,623	\$2,716,317	\$2,912,208	\$2,532,275	\$2,243,599
BART	\$30,168,137	\$32,231,794	\$29,504,275	\$34,026,622	\$28,397,139	\$26,038,335
Caltrain	\$4,963,008	\$4,713,101	\$4,703,954	\$4,773,015	\$4,204,188	\$3,890,933
Golden Gate Ferry	\$2,066,662	\$2,099,534	\$1,782,297	\$1,807,185	\$1,325,803	\$1,300,228
Golden Gate Transit	\$1,042,003	\$1,141,166	\$1,040,879	\$1,184,779	\$983,073	\$887,948
SamTrans	\$460,106	\$502,055	\$552,623	\$585,872	\$491,422	\$486,104
SF Bay Ferry	\$992,605	\$1,109,367	\$1,008,841	\$1,150,254	\$876,734	\$828,746
SFMTA	\$10,755,541	\$10,746,704	\$10,593,391	\$11,186,547	\$9,752,309	\$9,708,376
SMART	\$295,340	\$295,469	\$279,657	\$283,477	\$240,636	\$216,834
Union City	\$6,525	\$7,738	\$8,168	\$9,819	\$7,820	\$7,315
VTA	\$949,941	\$951,384	\$962,883	\$1,025,169	\$838,812	\$849,766
East Bay Group	\$239,150	\$283,188	\$284,693	\$331,088	\$267,387	\$238,611
Napa/Solano	\$180,888	\$198,175	\$178,999	\$205,287	\$171,658	\$152,574
Sonoma/101	\$12,184	\$13,869	\$12,657	\$14,846	\$12,425	\$11,561
<b>Total Revenue</b>	<b>\$54,560,208</b>	<b>\$57,239,164</b>	<b>\$53,629,634</b>	<b>\$59,496,166</b>	<b>\$50,101,680</b>	<b>\$46,860,930</b>

**Table 6: Bank Account Balances, Previous 6 Months**

Month End	Float <sup>18</sup>	Participant Claim Fund <sup>19</sup>
July 2018	\$68,774,970	\$1,229,822
August 2018	\$69,169,892	\$1,633,060
September 2018	\$70,914,797	\$1,840,662
October 2018	\$71,743,225	\$2,009,480
November 2018	\$74,820,000	\$2,356,403
December 2018	\$75,140,000	\$705,121

18 One reason for drops in the float account is delayed payment from retailers, particularly Walgreens, at the end of the month. Starting in November, this number is rounded to reflect float liability, including the float balance and funds swept into an investment account.

19 Drops in the PCF balance are due to operator distributions concurrent with their recurring bad debt adjustment.

## Clipper Contractor Performance

**Table 7: Cubic Cardholder Support Performance, December 1-31, 2018**

	Key Performance Indicator (KPI) Description	KPI Score
1	≥ 95% of calls answered within 3 minutes	98.33%
2	≥ 98% of new and replacement card requests fulfilled within two business days	99.94%
3	≥ 99.5% website functionality availability	99.91%
4	≥ 95% of emails and website inquiries responded to within 48 hours	100.00%
5	≥ 95% of refunds processed within 30 calendar days	99.85%
6	≤ 3-minute average speed of answer	00:00:12
7	≤ 6% calls abandoned	0.64%
8	≥ 95% of unblock actions processed within two business days	100.00%
9	≥ 95% IVR <sup>20</sup> and ACD <sup>21</sup> availability	100.00%

**Missed**

**Achieved**

<sup>20</sup> IVR: Interactive voice response, also referred to as the Clipper automated phone system

<sup>21</sup> ACD: Automated Call Distributor, the system that routes calls to customer service representatives





METROPOLITAN  
TRANSPORTATION  
COMMISSION

Bay Area Metro Center  
375 Beale Street, Suite 800  
San Francisco, CA 94105

## **Clipper® Program Management Report**

Published monthly

### **Executive Director:**

Steve Heminger

### **Deputy Executive Directors:**

Alix Bockelman, Policy

Andrew Fremier, Operations

### **Director, Electronic Payments:**

Carol Kuester

### **Clipper® Assistant Directors:**

Lynn Valdivia

Jason Weinstein

**Managing Editor:** Lysa Hale

**Data Editor:** Gopi Purohit

**Cover Design and Layout:** MTC Graphics

ID	Task Name	Duration	Start	Finish	% Complete	2018												2019												Attachment B
						J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
2	CONTRACTING PHASE																													
713	Caltrain TVM Clipper Integration (CN-162)	226 days	7/3/2018	5/14/2019	55%																									
723	Means Based Fare Discount Clipper Coupon (CN-163)	188 days	8/15/2018	5/3/2019	53%																									
760	BART Add Fare Machine (CN-166)	126 days	12/30/2018	6/24/2019	13%																									
393	IMPLEMENTATION PHASE																													
10	BART Handheld Card Reader (HCR) Replacement (CO-213)	786 days	3/28/2016	3/28/2019	98%																									
310	SFMTA Central Subway (CO-195)	938 days	5/2/2016	12/2/2019	13%																									
697	WETA Richmond & San Francisco Ferry Terminal Expansion (CO-225, CI	419 days	4/19/2018	11/27/2019	97%																									
627	BART E. Contra Costa & Silicon Valley Berryessa Extensions (eBART/SVBX) (CO-179-1, CN-145)	287 days	4/30/2018	6/4/2019	21%																									
492	AC Transit BRT Implementation, (CO-197 & CO-205)	170 days	5/1/2019	12/24/2019	0%																									





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

---

**File #:** 19-0112      **Version:** 1      **Name:**  
**Type:** Report      **Status:** Informational  
**File created:** 1/29/2019      **In control:** Clipper Executive Board  
**On agenda:** 2/25/2019      **Final action:**  
**Title:** Next Generation Clipper® System Integrator Implementation Update  
Update on the Next-Generation Clipper System Integrator Implementation.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [4d\\_C2 SI Update.pdf](#)

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

**Subject:**

Next Generation Clipper® System Integrator Implementation Update

Update on the Next-Generation Clipper System Integrator Implementation.

**Presenter:**

Jason Weinstein

**Recommended Action:**

Information

**Attachments:**



## Agenda Item 4d

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: February 19, 2019

FR: Carol Kuester

RE: Next Generation Clipper® System Integrator Implementation Update

This memorandum is to update Board members on key developments on the implementation of the Next Generation Clipper System Integrator project since the last briefing we presented in December 2018.

### Operator Engagement

- Clipper staff, along with the technical advisor the IBI group (IBI), held a well-attended meeting with the small operators in which staff detailed the upcoming system changes and features of the next generation Clipper system and answered questions from the small operators.
- IBI has also launched a series of early technical meetings in response to operators' questions about ticket vending machine and on-board equipment integration.
- Clipper staff and IBI presented about the features of the next generation Clipper systems to the Bay Area Partnership Accessibility Committee and the BART Accessibility Task Force.

### Initial Contract Submittals and Review

MTC and the transit operators are working towards the approval of the first Submittal Package from Cubic Transportation Systems, Inc. (Cubic). This package included the Accelerated Deployment Plan and Project Schedule. Following the delivery of Cubic's second Submittal Package in mid-March, MTC will be hosting a series of meetings with Cubic and the operators to present key proposals within the documents and discuss any initial questions.

In subsequent months, we will include an attachment to this memorandum that summarizes recently completed activities related to delivering the program; upcoming activities and deliverables for MTC, Cubic, and the transit operators; and newly identified issues that the project team is managing.

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