

## Clipper® Executive Board

May 20, 2024

Agenda Item 3e

**Clipper® In-Person Customer Service Centers Contract Actions: i. Contract – TTEC Government Solutions, LLC (TTEC) (\$1,725,000); ii. Contract Amendment – Nematode Holdings, LLC (Nematode) (\$315,000); iii. Funding Agreement Amendment – Alameda-Contra Costa Transit District (AC Transit) (\$250,000)**

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### **Subject:**

Request for approval of the listed In-Person Customer Service Center contract actions:

- i. Contract – TTEC Government Solutions, LLC (TTEC) (\$1,725,000)
- ii. Contract Amendment – Nematode Holdings, LLC (Nematode) (\$315,000)
- iii. Funding Agreement Amendment – Alameda-Contra Costa Transit District (AC Transit) (\$250,000)

### **Background:**

The Clipper program funds in-person customer service centers at two San Francisco locations and AC Transit's Oakland headquarters. In addition to issuing new Senior, Youth and adult Clipper cards and selling value, these service centers replace lost and damaged cards, accept cash payment for card replacement fees, distribute Clipper START materials, and provide information about how customers can obtain and use Clipper mobile cards. Historically, items pertaining to in-person customer service activities have been presented to this board together under one memo.

- i. Contract – Clipper In-Person Customer Service Center at Embarcadero BART/Muni Metro Station: TTEC Government Solutions, LLC (\$1,725,000)**

One of the San Francisco Clipper in-person customer service centers is pivotally located in the Embarcadero BART/Muni Metro station and serves between 2500 and 3000 customers a month. The current contract with TTEC expires on June 30, 2024, and Clipper staff began a procurement for a new contract by issuing a Request for Proposals on January 22, 2024. Proposals were due February 26, 2024, and we received one proposal from TTEC. The evaluation panel was made up of both MTC staff and transit agency staff who evaluated the proposal based on Qualifications and Team Experience (30%), Work Plan and Approach (25%), Cost Effectiveness

(10%), Price (30%), Presentation (5%), and status as a Small Business Enterprise. The evaluation panel are recommending that the contract be awarded to TTEC. TTEC's proposal demonstrated strengths in all the evaluated criteria. The contract term is for a period of three years through June 30, 2027, with the option to extend for an additional 5 years in increments of MTC's choosing.

**Issues:**

None identified.

**ii. Contract Amendment – Clipper In-Person Customer Services at the Bay Crossings Store (San Francisco Ferry Building): Nematode Holdings, LLC (\$315,000)**

Under the proposed contract amendment, Nematode would continue to provide Clipper customer services at its Bay Crossings store, as well as operate and maintain the Real-Time Ferry Departure Flap Sign System, in the Ferry Building. MTC first executed a sole source contract with Nematode in December 2010 to offer Clipper services. In July 2020, MTC executed a new sole source contract with Nematode due to the Bay Crossings store still being the only Ferry Building vendor selling transit value and providing information on behalf of multiple transportation partners. The amendment would extend operations through June 30, 2025.

**Issues:**

None identified.

**iii. Funding Agreement Amendment – Clipper In-Person Customer Service Center at AC Transit Headquarters: AC Transit (\$250,000)**

In April 2012, MTC executed a funding agreement with AC Transit to provide expanded Clipper customer services at AC Transit's headquarters in Oakland, walkable to several bus lines and BART's 12th and 19th Street stations. The amendment would extend operations through June 30, 2025.

**Issues:**

As part of the Next Generation Clipper system, every transit operator will receive a new Customer Service Terminal (CST) device to replace the legacy Ticket Office Terminal (TOT) devices. With its upgraded TOTs, a dedicated workstation that provides access to the Clipper customer database, and specialized training, the AC Transit headquarters is currently one of only

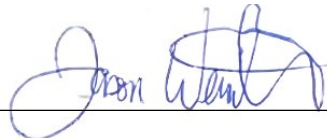
five locations that can provide more extensive Clipper customer services, including card replacement. After all the operators receive their new CSTs and training, we expect that the same suite of services will be available at more than 20 locations throughout the nine-county Bay Area. For this reason, we anticipate that this will be the final amendment to the existing funding agreement and that we will coordinate with AC Transit in the next year on changes to this location, which is currently co-branded as the Clipper Customer Service Center at AC Transit with significant exterior and interior signage promoting Clipper services.

**Recommendation:**

Staff recommends that the Clipper Executive Board approve a contract with TTEC in an amount not to exceed \$1,725,000, a contract amendment with Nematode in an amount not to exceed \$315,000, and a funding agreement amendment with AC Transit in an amount not to exceed \$250,000, to provide in-person Clipper customer services as described above.

**Attachments:**

None.



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Jason Weinstein

## Request for Board Approval

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### Summary of Proposed Contract

Contractor (or “Consultant”): TTEC Government Solutions, LLC (TTEC)  
Greenwood Village, CO

Work Project Title: Clipper In-Person Customer Service Center at Embarcadero  
BART/Muni Metro Station

Purpose of Project: Customer Service operations for Clipper customers at the San Francisco  
Embarcadero BART/Muni Metro location.

Brief Scope of Work: Issue new Senior, Youth and adult Clipper cards and sell value, replace  
lost and damaged cards, accept cash payment for card replacement fees,  
distribute Clipper START materials, and provide information about  
how customers can obtain and use Clipper mobile cards.

Project Cost Not to Exceed: \$1,725,000

Funding Source: Regional Measure 2 Marketing and Operations, State of Good Repair

Fiscal Impact: Funds dependent on approval of the FY 2024-25 MTC agency budget

Motion by Board: That a contract, with TTEC Government Solutions, LLC for the  
purposes described above and in the Clipper Executive Director’s  
summary sheet dated May 20, 2024, is hereby approved by the Clipper  
Executive Board.

Clipper Executive Board: \_\_\_\_\_  
Robert Powers, Chair

Approved: May 20, 2024

## Request for Board Approval

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### Summary of Proposed Contract Amendment

Contractor (or “Consultant”): Nematode Holdings, LLC  
San Francisco, CA

Work Project Title: Clipper Customer Service Center Operations at San Francisco Ferry Building (Bay Crossings)

Purpose of Project: Provide Clipper in-person customer services, including issuance of new and replacement cards; and maintain ferry schedule flap sign display

Brief Scope of Work: Contractor shall provide trained staff to support a range of Clipper customer services and the maintenance of the ferry schedule display

Project Cost Not to Exceed: \$315,000 (this amendment)  
Total Contract value including amendments before this amendment is \$1,223,284  
Total Contract amount with this amendment is \$1,538,284

Funding Source: Regional Measure 2 Marketing and Operations, STA, State of Good Repair

Fiscal Impact: Funds dependent on approval of the FY 2024-25 MTC agency budget

Motion by Board: That a contract amendment, with Nematode Holdings LLC, for the purposes described above and in the Clipper Executive Director’s summary sheet dated May 20, 2024, is hereby approved by the Clipper Executive Board.

Clipper Executive Board:  

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Robert Powers, Chair

Approved: May 20, 2024

## Request for Board Approval

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### Summary of Proposed Funding Agreement Amendment

Contractor (or “Consultant”): Alameda-Contra Costa Transit District (AC Transit)  
Oakland, CA

Work Project Title: Clipper Customer Service Center Operations at AC Transit  
Headquarters

Purpose of Project: Provide Clipper in-person customer services, including issuance of  
replacement cards, in the East Bay

Brief Scope of Work: Operate Clipper in-person customer service center

Project Cost Not to Exceed: \$250,000 (this amendment)  
Total Contract value including amendments before this amendment is  
\$3,034,200  
Total Contract amount with this amendment is \$3,284,200

Funding Source: Regional Measure 2 Marketing and Operations, STA, State of Good  
Repair

Fiscal Impact: Funds dependent on approval of the FY 2024-25 MTC agency budget

Motion by Board: That a funding agreement amendment, with AC Transit, for the  
purposes described above and in the Clipper Executive Director’s  
summary sheet dated May 20, 2024, is hereby approved by the Clipper  
Executive Board.

Clipper Executive Board:

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Robert Powers, Chair

Approved: May 20, 2024