



Agenda Item 3c

Bay Area Metro Center

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TO: Clipper® Executive Board

DATE: July 10, 2017

FR: Carol Kuester

RE: Public Comment on Next-Generation Clipper® (C2) System Integrator Draft Request for Proposal (RFP)

Background

MTC released a draft RFP for the vendor that will serve as C2 system integrator, responsible for coordinating all vendors delivering the new system. MTC invited the payments industry to comment on the draft before releasing the final version and also opened the comment opportunity to members of the public, from February 27 to April 3, 2017. MTC prepared a summary of main characteristics of the draft RFP in English, Spanish, Chinese and Vietnamese. MTC also conducted an online survey to provide input on the next-generation Clipper® system. Survey feedback was accepted between April 17 and June 1, 2017.

Public Comment on Draft RFP

More than 100 people submitted comments, most through email, and the most commented-on topics addressed fare policy or program features such as real-time add-value transactions, integration with other programs (such as tolls or bike share), and other fare payment options (like using mobile phones). A summary of comments is provided in Attachment A. Those related to program features are generally already being addressed in the RFP either through specific requirements or requirements for flexible development to accommodate changing needs.

However, several comments addressed issues separate from actual program features, including the structure of the contract, the qualifications of the selected contractor and technical specifications for design of the program. The concept of “Flexible Agile Development Services” was encouraged, the commenter noting that it enables “the contractor to take over the current system and then implement incremental improvements, rather than requiring from the start that they build a new system as a full replacement before deployment.” One commenter suggested having a multi-day-long trial run where prospective contractors are required to build a limited related prototype, with a company experienced with agile contracting helping evaluate prototypes. One person suggested reducing project cost and risk by breaking the contract into multiple services, rather than “a single monolithic contract”, to increase competition, lower costs, and enable more fine-grained management of the development.

Experience with user experience-based development was important to several. One specifically requested that “user experience” be included as an integral part of the RFP and reflection of the vision of the next generation of Clipper®. Another suggested “adding user testing and validation to all design stages, and demonstrated experience with user testing and user experience (UX) design to

the evaluation criteria of the contract.” Yet another encouraged MTC to hire a firm with a strong grasp of UX language and content strategy.

Two people encouraged the use of open source software and open source software components, one noting “it's easier to audit the code for open source components, open source projects attract a wider range of bug fixes and feature additions, more people have training and experience to fix problems in open source projects, and it's cheaper to make modifications to the programs.”

One commenter made detailed requests around reporting, including requiring data access and reporting via a central, open portal, available to transit agencies, jurisdictions, institutional customers, and other entities, with user data anonymized for privacy. The same person noted that transit agencies appear to be the only customers for reporting, and the RFP does not propose an API or database that can be easily updated by various transit agencies or standards for agencies to report on analytics and performance metrics.

Suggestions for contract language include adding "completion while meeting or exceeding all deadlines" and "without cost overruns" to the desired experience. One also addressed the lack of stated performance measures and performance criteria, mentioning revenue and ridership specifically.

MTC and transit operator staff are open to these suggestions and will consider each as the RFP is finalized. Attachment B summarizes how staff plans to address these topics in the RFP.

Online Opt-In Survey

MTC's online survey for customers to provide input and preferences for the next generation of Clipper® opened on April 17 and closed on June 1. The survey received over 8,300 responses compared to 7,500 responses for the initial 2014 survey. Staff is currently analyzing these responses and will present a detailed report on findings at a future meeting.



Carol Kuester

Attachment:

- Attachment A: Comments on Draft RFP for C2 System Integrator
- Attachment B: C2 Draft RFP for Industry Review Public Comments

Attachment A

Comments on Draft RFP for C2 System Integrator

MTC received 102 comments on the Draft RFP for the C2 System Integrator. Topics addressed included:

- Project Management and System Requirements (38 comments)
 - *Many comments were suggestions for contracting and included phrases like type of contract, grasp of UX language and content strategy, performance measures, Flexible Agile Development, user testing and validation, limited related prototype, break contract up, open source. This category also included comments addressing customer education issues.*
- System Features (48 comments)
 - *Real-time transactions (15 comments)*
 - *Integration with other modes like bike share, etc. (13 comments)*
 - *Use via other fare media like ApplePay and similar services (11 comments)*
 - *Clipper® mobile app (9 comments)*
- Other
 - *Fare Policy (42 comments)*
 - *Comments addressed integration, streamlining, consistency/unified, equity, caps, monthly/weekly/daily options, multi-agency day pass, proof of purchase systemwide, reward programs and comments about Caltrain business rules (zones, tag on/tag off).*
 - *Other topics included security and privacy, the website, ticket machines, accessibility issues, discounts (for youth, seniors and disabled riders), and integration with parking and tolls. Each of these received fewer than five mentions.*



C2 Draft RFP for Industry Review Public Comments

*Clipper Executive Board
July 17, 2017*

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Attachment B

Feedback on Draft RFP

- February 27-April 3
- Summary in four languages
- Comments via voicemail, email or social media
- 102 comments received
 - Coded into categories (fare policy, preferred fare media, etc.)



Project Management and System Requirement Feedback on Draft RFP

- Flexible Agile Development
- Multi-day-long trial run with prototype
- Break the contract into multiple services
- User experience expertise
- User testing and validation in all design stages
- Open source software and components
- Reporting
- Schedule and budget adherence
- Performance measures and criteria



Feedback	RFP Considerations
Flexible Agile Development	Development of C2 system will be expected to have an iterative and incremental approach
Trial with Prototypes	Evaluation Process currently includes site visits and system demonstrations
Multiple Contracts	Separate contracts for System Integrator, CSC, Payment Gateway and Fare Media with multiple subcontractor opportunities
User Experience (UX) and Testing	Requirements are expected to emphasize UX development and testing
Open Source Software	Systems integrators permitted to use open source software and solutions
Reporting	Published APIs and interfaces to third party reporting tools are required under C2
Schedule and Budget Adherence	Contract is expected to include Financial Risk Mitigation features
Performance Measures	SLAs and Performance Incentives and Disincentives will be included in the RFP and Contract



System Feature Feedback on Draft RFP

System Features requested in the new C2 system included:

- Real-time transactions
- Integration with other modes like bike share, etc.
- Use via other fare media like ApplePay and similar services
- Robust Clipper mobile app
- Parking and Toll Integration



Other Feedback on Draft RFP

- Regional Fare Policy
- Security and Privacy
- Clippercard.com website
- Accessibility Issues
- Discounts (youth, senior, and disabled riders)

