



Agenda Item 3a

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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

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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.

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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.

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

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