

Clipper® Executive Board

June 17, 2019

Agenda Item 4c

Next Generation Clipper® Customer Service Center (CSC) Procurement Update

Subject: Update Board members on key developments in the Next Generation Clipper CSC procurement. The CSC procurement is one of four procurements currently planned for the Next Generation system, which also includes procurements for the System Integrator (completed), Fare Media, and a Payment Gateway.

Background: In collaboration with a group of transit operator representatives and MTC staff, the Next Generation Clipper Technical Advisor, IBI, has developed a general scope of work (SOW) for the Next Generation Clipper CSC contractor. The SOW includes:

1. Operations to support the following communications channels: phone, email, social media, chat, mail, and fax
2. Other work activities, including:
 - a. Participation in Next Generation Clipper System Integrator design
 - b. Provision of interactive voice response (IVR) and automated contact distribution (ACD) systems
 - c. Eligibility verification for youth and senior fare categories
 - d. Provision of tiered levels of customer service for private and institutional partners

The technical requirements and form of contract for the CSC procurement are largely complete, with some remaining items for final decisions including:

1. Financial guarantees
2. Key performance indicators, along with performance incentives and disincentives
3. Payment methodology:
 - a. Lump sum, firm fixed price for design and development, installation and testing, training, transition, and end-of-term transition
 - b. Monthly firm fixed and volume-based unit price for operations and maintenance work with a not-to-exceed maximum payment amount.

Next Steps

MTC staff recommends the form of contract and scope of work for the Next Generation CSC procurement be released for industry review this summer in advance of finalizing the documents. Staff is interested specifically in feedback from industry on the items identified above, as well as the technical requirements generally. An important focus will be contractual and technical requirements perceived by vendors to restrict or reduce competition among vendors. Staff will ask industry to provide feedback in a format similar to the request for exceptions table provided with all requests for proposals.

Following industry review, transit operators will be briefed on the input from industry as well as MTC and IBI's recommendations; then the complete request

for proposals package – including the cover document, form of contract, price forms, and scope of work – will be finalized for executive approval and issuance. Staff will continue to provide the Clipper Executive Board with updates on key developments in the Next Generation Clipper CSC procurement process.

Attachments: **Attachment A:** Next Generation Clipper Customer Service Center Update



Carol Kuester



Next Generation Clipper Customer Service Center Procurement

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Attachment A

Next Generation Clipper Procurements

System Integrator

Customer Service Center

Fare Media

Payment Gateway



Next Generation Clipper Procurements

System Integrator

Customer Service Center

Fare Media

Payment Gateway

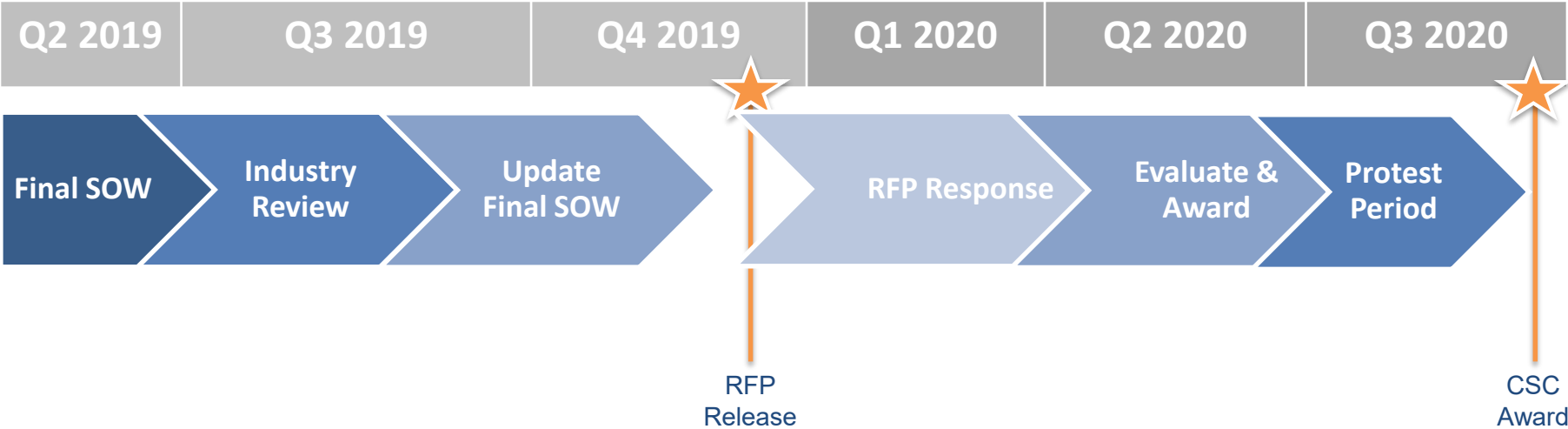


Next Generation Clipper Customer Service Center Scope

1. Operations Contract for Contact Center
2. Work to Include:
 1. Participant during System Integrator design
 2. Interactive voice response(IVR) and automated contact distribution (ACD) systems
 3. Eligibility verification for youth and senior fare categories
 4. Tiered levels of customer service
 5. KPI incentives and disincentives



Next Generation Clipper CSC Procurement Timeline



Next Steps – Resolve Outstanding Items

1. Financial Guarantees
2. Service Levels / KPIs
 1. Incentives and disincentives scheme
3. Payment Methodology
 1. Lump sum, firm fixed price for design through transition
 2. Monthly firm fixed and volume-based unit price for O/M work with a not to exceed maximum payment amount

