

# Clipper<sup>®</sup> Executive Board

September 16, 2019

Agenda Item 4b

## Next Generation Clipper<sup>®</sup> System Update

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**Subject:** Update Board members on key developments related to the implementation of the Next Generation Clipper System Integrator project, focusing on recent strategies on next generation onboard equipment and an update on the Next Generation Clipper customer service center procurement.

**Background:** **Executive Summary**

Included as Attachment A to this memorandum is a summary of recently completed activities related to delivering the Next Generation Clipper program; upcoming activities and deliverables for MTC, Cubic, and the transit operators; and noteworthy items that the project team is managing. This will be updated and presented to this Board monthly.

**Initial Design Review**

Cubic, MTC, and the transit operators participated in six meetings held August 27, 28, and 29 related to the initial design review submittal, including documents related to:

- Accelerated Deployment Design
- Validator Design (multiple validator types as required by the Contract)
- Back Office Design (C1 functionality to support future system migration)
- Website, Web Portal, and Mobile App Design
- Communications Network Design

Participation was high, as nearly 70 MTC and transit operator staff representing over 13 agencies in the region participated in at least one of these meetings. Comments from nearly 40 MTC and transit operator staff were submitted to Cubic the first week in September, with a targeted date for approval in early October.

**Next Generation Onboard Equipment Strategy**

At its June 17, 2019 meeting, the Clipper Executive Board unanimously approved a revision to the Next Generation Device Strategy, in which all the region's bus operators would receive Next Generation devices under Accelerated Deployment. Through a streamlined change management process defined under the Next Generation Clipper scope of work, the Change Control Board, consisting of MTC and transit operator staff, reviewed the proposed scope and voted unanimously to move forward with a Change Order. The Change Order is currently routing and resulted in savings of nearly \$100,000 in the Next Generation Clipper System Integrator contract.

Currently, MTC and transit operator staff are reviewing work related to several options of integration with bus operators' CAD/AVL systems that would communicate with the onboard validators and may eliminate the need for an Operator Control Unit. Work is expected to ramp up this year, as initial equipment order quantities are needed by the end of this year. MTC, Cubic, transit operator staff, and their CAD/AVL vendors are required to participate in the discussions if they want to pursue this option. We will return to the Board for the approval of a contract change order should the CAD/AVL integration options with the Next Generation equipment and system require a change to the Next Generation Clipper Contract.

**Next Generation Customer Service Center (CSC) Update**


Unlike the current iteration of the Clipper program, the Next Generation Clipper program split the system integrator tasks from other functions of the program. The system integrator contract was awarded in September 2018. The CSC, payment gateway, and fare media contracts are yet to be awarded.

Over the past several months, MTC, transit operators, and program technical advisors, the IBI Group, have been drafting a scope of work to release a Request for Information (RFI) for the Next Generation CSC. The purpose of the CSC RFI is to obtain feedback and input from industry experts in the area of customer service operations and from integrated voice response (IVR) and automatic call distribution (ACD) system developers that will further inform and refine the CSC procurement document. This feedback will be used to promote a level playing field and to maximize the number of competitive proposals received for the Request for Proposals once released. As shown in Attachment B, the RFI is expected to be released for industry feedback later this month.

**Attachments:**

**Attachment A:** Next Generation Clipper Program Executive Summary Status Report

**Attachment B:** Next Generation Clipper® Customer Service Center Update



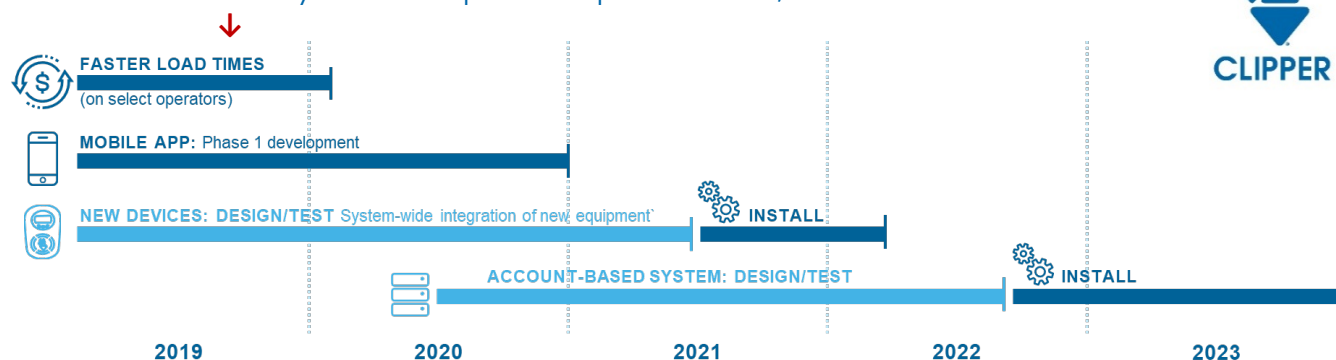
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Carol Kuester



# Next-Generation Clipper Program

## Executive Summary Status Report – September 16, 2019



### Summary

- Faster Load Times and Mobile App test plans approved.
- Review Cycle 1 for Accelerated Deployment design documents underway.
- Mobile App UI/UX workshops and technical discussions continue with operators.
- Review Cycle 2 submittal expected in mid-October.

### Recently Completed Activities

	MTC/IBI	Cubic	Operators	Date
• Technical meetings with operators:				
o BART	•	•	•	Aug 21
o SFMTA	•	•	•	Aug 16
• Accelerated Deployment Test Plans:				
o Resubmittal by Cubic		•		Aug 21
o Comments on resubmittal sent to Cubic	•			Aug 30
o Approval by MTC	•			Sep 6
• Mobile App UI/UX design workshops	•	•	•	Sep 3, 9
• Review Cycle 1 documents:				
o Review meetings with Cubic	•	•	•	Aug 27-29
o Comments sent to Cubic	•		•	Sep 5

### Upcoming Activities/Deliverables

	MTC/IBI	Cubic	Operators	Date
• Mobile App UI/UX design:				
o UI/UX design workshops	•	•	•	Sep 17
o UX approval	•		•	Sep 23
o UI approval	•		•	Sep 23
• Review Cycle 1 documents:				
o Resubmittal by Cubic		•		Sep 20
o Comments on resubmittal due to Cubic	•		•	Oct 3
• Review Cycle 2 documents:				
o Submittal by Cubic		•		Oct 18
o Review meetings with Cubic	•	•	•	Week of Oct 28
• Technical meetings with operators:				
o BART	•	•	•	Oct 16
o SFMTA	•	•	•	Oct 18
• Clipper Executive Board Meeting	•	•	•	Oct 21



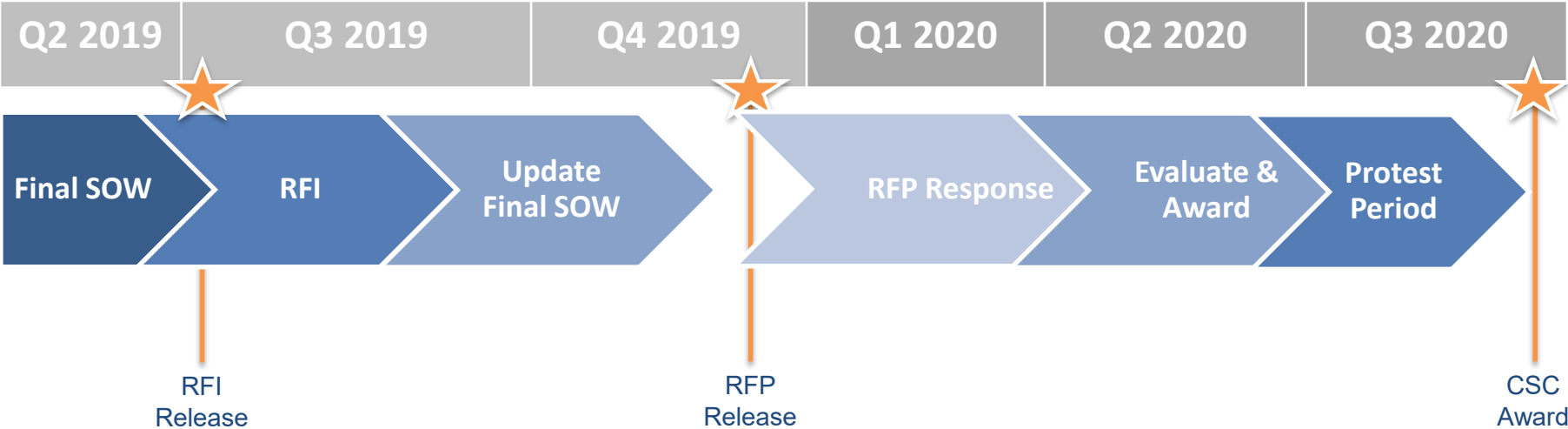
# Next Generation Clipper Customer Service Center Procurement

Clipper® Executive Board

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Attachment B

# 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

