



Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Agenda

Clipper Executive Board

Robert Powers, Chair

April Chan, Vice Chair

Monday, June 24, 2024

1:30 PM

BART

2150 Webster Street, Board Room– 1st Floor
Oakland, CA 94612

The Clipper Executive Board is scheduled to meet at 1:30 p.m.

Meeting attendees may opt to attend in person for public comment and observation at BART, 2150 Webster Street, Board Room (1st Floor), Oakland CA 94612. In-person attendees must adhere to posted public health protocols while in the building. The meeting webcast will be available at <https://mtc.ca.gov/whats-happening/meetings/live-webcasts>. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number.

Members of the public participating by Zoom wishing to speak should use the “raise hand” feature or dial *9. When called upon, unmute yourself or dial *6. In order to get the full Zoom experience, please make sure your application is up to date.

Attendee Link: <https://us06web.zoom.us/j/84907118420>
iPhone One-Tap: US: +16694449171,,84907118420# US
+16699006833,,84907118420# US (San Jose)

Join by Telephone (for higher quality, dial a number based on your current location) US:
888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)
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<https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom>

Members of the public may participate by phone or Zoom or may submit comments by email at info@bayareametro.gov by 5:00 p.m. the day before the scheduled meeting date. Please include the committee or board meeting name and agenda item number in the subject line. Due to the current circumstances, there may be limited opportunity to address comments during the meeting. All comments received will be submitted into the record.

Clerk: Wally Charles

Roster

Robert Powers, Chair; April Chan, Vice Chair

Members: Eddy Cumins, Andrew B. Fremier, Carolyn M. Gonot, Michael Hursh, Denis Mulligan, Jeffrey Tumlin, and Christy Wegener.

1. Call to Order / Roll Call / Confirm Quorum

A quorum of the Board shall be a majority of its voting members (5).

2. Consent Calendar

- 2a. [24-0803](#) Minutes of the May 20, 2024 Meeting

Action: Approval

Attachments: [2a Minutes of the May 20, 2024 Meeting](#)

- 2b. [24-0804](#) Regional Transit Connection (RTC) Clipper® Access Submittal Policy Expansion

Recommendation to approve the RTC Clipper Access program's submittal process to allow customers to submit applications online through the new RTC Clipper Access self-service portal.

Action: Approval

Presenter: Lydia Elias, MTC

Attachments: [2b RTC Clipper Access Submittal Policy Expansion](#)

- 2c. [24-0809](#) Clipper® MOU Provisions and Reimbursing Transit Agencies for Lost Fare Revenue

The Clipper Memorandum of Understanding (MOU) contains provisions setting forth how revenue generated by the Clipper program is to be applied. This Agenda Item focuses on the line item in the FY 23-24 Clipper Operating Budget that allocates \$200,000 of the interest income generated by investment of the Clipper float account for reimbursing transit agencies for lost fare revenue due to Clipper system operational problems, and addressing that budgetary allocation in light of the provisions of the Clipper MOU.

Action: Information

Presenter: Jason Weinstein, MTC

Attachments: [2c Clipper MOU Provisions and Reimbursing Transit Agencies for Lost Fare Re](#)

3. Information

- 3a.** [24-0806](#) Clipper® Schedule, Implementation, and Deployment Update
- Update on key developments related to the implementation of the current and Next Generation Clipper System (C2). Contractor Cubic Transportation Systems will be in attendance.
- Action:** Information
- Presenter:** Jason Weinstein, MTC
- Attachments:** [3a Clipper Schedule and Implementation and Deployment Update](#)
[3ai_CEB Status Report](#)
[3aia_CEB June 2024 - Cubic Update](#)
- 3b.** [24-0807](#) Current Clipper® Operations and Performance Update
- Update on current Clipper system operations and performance
- Action:** Information
- Presenter:** Akash Ghosal, MTC
- Attachments:** [3b_Current Clipper Operations and Performance Update](#)
- 3c.** [24-0808](#) Next Generation Clipper® Marketing and Communications Plan
- Update on Next Generation Clipper Marketing and Communications Plan
- Action:** Information
- Presenter:** Lysa Hale, MTC
- Attachments:** [3c Clipper Executive Board Summary Sheet Communications Plan](#)
[3ci_Next Generation Clipper Marketing and Communications Plan](#)

4. Acting Executive Director's Report- Weinstein

5. Public Comment / Other Business

*Board Members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial *9. When called upon, unmute yourself or dial *6.*

6. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be held Monday, July 22, 2024, at BAMC, Board Room -1st Floor, 375 Beale Street, San Francisco CA 94105. Any changes to the schedule will be duly noticed to the public.

Public Comment: The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

Meeting Conduct: If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Committee may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

Record of Meeting: Committee meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site (mtc.ca.gov) for public review for at least one year.

Accessibility and Title VI: MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.

可及性和法令第六章: MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

Acceso y el Título VI: La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Attachments are sent to Committee members, key staff and others as appropriate. Copies will be available at the meeting.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0803 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 5/30/2024 **In control:** Clipper Executive Board
On agenda: 6/24/2024 **Final action:**
Title: Minutes of the May 20, 2024 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [2a_Minutes of the May 20, 2024 Meeting](#)

Date	Ver.	Action By	Action	Result
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Subject:
Minutes of the May 20, 2024 Meeting

Recommended Action:
Approval

Attachments:



Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Meeting Minutes - Draft

Clipper Executive Board

Robert Powers, Chair

April Chan, Vice Chair

Monday, May 20, 2024

1:00 PM

Board Room - 1st Floor

The Clipper Executive Board is scheduled to meet at 1:00 p.m.

Meeting attendees may opt to attend in person for public comment and observation at 375 Beale Street, Board Room (1st Floor). In-person attendees must adhere to posted public health protocols while in the building. The meeting webcast will be available at <https://mtc.ca.gov/whats-happening/meetings/live-webcasts>. Members of the public are encouraged to participate remotely via Zoom at the following link or phone number.

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Attendee Link: <https://bayareametro.zoom.us/j/81296282668>
iPhone One-Tap: +16699006833,,81296282668# US (San Jose)
+14086380968,,81296282668# US (San Jose)

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International numbers available: <https://bayareametro.zoom.us/j/kzkgMFRhi>

Detailed instructions on participating via Zoom are available at:

<https://bayareametro.zoom.us/j/kdR1hznEgA>

<https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom>

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Clerk: Wally Charles

Roster**Robert Powers, Chair; April Chan, Vice Chair****Members: Eddy Cumins, Andrew B. Fremier, Carolyn M. Gonot, Michael Hursh, Denis Mulligan, Jeffrey Tumlin, and Christy Wegener.****1. Call to Order / Roll Call / Confirm Quorum**

Millie Tolleson acted as a delegate and voting member of the Clipper Executive Board in place of Member April Chan. Attendance and Actions noted below as “Chan” were taken by Tolleson.

Heather McKillop acted as a delegate and voting member of the Clipper Executive Board in place of Member Eddy Cumins. Attendance and actions noted below as “Cumins” were taken by McKillop.

Greg Richardson acted as a delegate and voting Member of the Clipper Executive Board in place of Member Carolyn Gonot. Attendance and Actions noted below as “Gonot” were taken by Richardson.

Joe Wire acted as a delegate and voting member of the Clipper Executive Board in place of Member Denis Mulligan. Attendance and Actions noted below as “Mulligan” were taken by Wire.

Present: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins, and Board Member Wegener

2. Consent Calendar

Upon the motion by Board Member Tumlin and seconded by Board Member Hursh, the Consent Calendar was unanimously approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

2a. [24-0400](#) Minutes of the March 25, 2024 Meeting

Action: Approval

Attachments: [2a_24-0400_Minutes of the March 25, 2024 Meeting](#)

2b. [24-0631](#) Clipper® Purchase Order - Network Services: AT&T (\$300,000)

Request for approval of a Purchase Order for Clipper Network Services for Fiscal Year 2024-2025: AT&T (\$300,000)

Action: Approval

Presenter: Sarah Doggett, MTC

Attachments: [2b_24-0631_CEB Memo for Purchase Order AT&T Network](#)

3. Approval**3a.** [24-0530](#) Clipper® Unregistered Inactive Funds Disbursement (\$2,700,000)

Request for the Board to give its approval of a disbursement of money, representing balances on unregistered inactive Clipper cards, from the Clipper Float Account toward application of Clipper program operating expenses -- in this specific instance, \$2,700,000 for inclusion in the FY 24/25 Clipper Operating Budget.

Action: Approval

Presenter: David Weir, MTC

Attachments: [3a_24-0530_Clipper® Unregistered Inactive Funds Disbursement](#)

The following individuals spoke on this Item:
Aleta Dupree, Team Folds.

Upon the motion by Board Member Fremier and seconded by Board Member Hursh, this Action Item was approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

3b. [24-0529](#) Clipper® Two Year Budget and Work Plan

The Clipper budget and work plan for Fiscal Years (FYs) 2024-25 and 2025-26 for the Executive Board's review and Approval

Action: Approval

Presenter: Edward Meng, MTC

Attachments: [3b_24-0529_Clipper Two Year Budget](#)
[3bi_24-0529_Operating Revenue and Budget](#)
[3bii_24-0529_Capital Revenue and Budget](#)

The following individuals spoke on this Item:
Aleta Dupree, Team Folds.

Upon the motion by Board Member Fremier and seconded by Board Member Gonot, this Action Item was approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

- 3c.** [24-0528](#) Clipper® Customer Education and Outreach Contract Actions: i. Contract Amendment - Moore Iacofano Goltsman, Inc. (MIG) (\$3,600,000); ii. Contract Amendment - Caribou Public Relations, Inc. (Caribou) (\$400,000)

Request for approval of the listed consultant contract actions to add \$3,600,000 to the MIG contract to provide customer education support to the Next-Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

Action: Approval

Presenter: Lysa Hale, MTC

Attachments: [3c 24-0528 Contract Amendment for MIG and Caribou PR](#)

The following individuals spoke on this Item:
Aleta Dupree, Team Folds.

Upon the motion by Board Member Cumins and seconded by Board Member Mulligan, this Action Item was approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

- 3d.** [24-0531](#) Clipper® Technical Consultant Contract Actions: i. Contract Amendment - Arcadis, a California partnership (Arcadis) (\$1,200,000); ii. Contract Amendment - Invoke Technologies, Inc. (Invoke) (\$250,000); iii. Contract Amendment - ARC Alternatives (\$200,000)

Request for approval of the listed technical consultant contract actions to add \$1,200,000 to the Arcadis contract to provide technical advice to MTC and the transit operators during the design, testing, installation, and implementation of the Next Generation Clipper (C2) System; \$250,000 to the Invoke contract for program management support services; and \$200,000 to the ARC Alternatives contract for budgetary and administrative assistance.

Action: Approval

Presenter: Edward Meng, MTC

Attachments: [3d 24-0531 Technical Consultant Contract Actions](#)

Upon the motion by Board Member Hursh and seconded by Board Member Wegener, this Action Item was approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

- 3e.** [24-0532](#) 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)

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)

Action: Approval

Presenter: Alison Edwards, MTC

Attachments: [3e 24-0532 Clipper In-Person Customer Service Centers Contract Actions](#)

The following individuals spoke on this Item:
Aleta Dupree, Team Folds.

Upon the motion by Board Member Mulligan and seconded by Board Member Fremier, this Action Item was approved. The motion carried by the following vote:

Aye: 9 - Board Member Mulligan, Board Member Hursh, Chair Powers, Board Member Tumlin, Board Member Gonot, Board Member Chan, Board Member Fremier, Board Member Cumins and Board Member Wegener

4. Information

- 4a.** [24-0402](#) Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the current and Next Generation Clipper System (C2).

Action: Information

Presenter: Jason Weinstein, MTC

- Attachments:** [4a 24-0402 Clipper Schedule and Implementation Update](#)
[4ai 24-0402_CEB Status Report 2024-05-20](#)
[4aii 24-0402 Clipper Next Generation Equipment Pilot Installation Pictures](#)

The following individuals spoke on this Item:
Aleta Dupree, Team Folds; and Adina Levin, Seamless Bay Area.

- 4b.** [24-0403](#) Current Clipper® Operations and Performance Update
- Update on current Clipper system operations and performance
- Action:** Information
- Presenter:** Edward Meng, MTC
- Attachments:** [4b 24-0403 Current Clipper Operations and Performance Update](#)

5. Acting Executive Director's Report- Weinstein

6. Public Comment / Other Business

The following individuals spoke on this Item:
Aleta Dupree, Team Folds.

7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board will be held on Monday, June 24, 2024, 1:30 p.m.at BART Board Room, 2150 Webster Street, 1st Floor, Oakland, CA 94612, any changes to the schedule will be duly noticed to the public.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0804 **Version:** 1 **Name:**

Type: Contract **Status:** Consent

File created: 5/30/2024 **In control:** Clipper Executive Board

On agenda: 6/24/2024 **Final action:**

Title: Regional Transit Connection (RTC) Clipper® Access Submittal Policy Expansion

Recommendation to approve the RTC Clipper Access program’s submittal process to allow customers to submit applications online through the new RTC Clipper Access self-service portal.

Sponsors:

Indexes:

Code sections:

Attachments: [2b_RTC Clipper Access Submittal Policy Expansion](#)

Date	Ver.	Action By	Action	Result
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Subject:

Regional Transit Connection (RTC) Clipper® Access Submittal Policy Expansion

Recommendation to approve the RTC Clipper Access program’s submittal process to allow customers to submit applications online through the new RTC Clipper Access self-service portal.

Presenter:

Lydia Elias, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

June 24, 2024

Agenda Item 2b

Regional Transit Connection (RTC) Clipper® Access Submittal Policy Expansion

Subject:

Recommendation to approve the RTC Clipper Access program's submittal process to allow customers to submit applications online through the new RTC Clipper Access self-service portal.

Background:

To encourage the use of fixed-route services, the Regional Transit Connection (RTC) Clipper Access program was established and provides a discount to riders with qualifying disabilities. Currently, first-time applicants must apply in-person at one of the Bay Area transit agencies' customer service centers that process RTC Clipper Access applications. Existing RTC cardholders may either apply in-person or mail in their application. Under MTC's coordination and management of the RTC Clipper Access program, the agency aims to align the discount Clipper programs wherever feasible to improve riders' experiences. RTC does not currently have a formal online submittal process. However, Clipper START as well as Senior and Youth Clipper discount cards all allow for online submittal of applications.

Under the Blue-Ribbon Transformation Action Plan, MTC and transit operators developed a plan to transform and more efficiently coordinate transit services for older adults, people with disabilities, and those with lower incomes.

To reduce the hurdles for people with qualifying disabilities to apply for the RTC Clipper Access card, the RTC Clipper Access program proposes allowing all applicants to apply online through the new RTC Clipper Access self-service portal. This online portal will allow applicants to submit their application materials and photo through a secure website. First-time RTC applicants will be required to upload a copy of their government-issued ID, along with the required application materials, per existing policy. MTC is working with a contractor, Slalom, to develop a Unified Benefits Portal which is expected to serve as a self-service portal for RTC Clipper Access, Clipper START, and other means-based programs. MTC staff presented this proposed policy and operational change to the Bay Area Partnership Accessibility Committee (BAPAC) at

its May 13, 2024 meeting. MTC staff also discussed this with transit operator staff in June 2024 who supported bringing this item to the Clipper Executive Board for approval.

MTC proposes the RTC Clipper Access self-service portal become operational in the following two phases:

- Phase 1 will allow applicants to submit applications that do not require a fee. This includes the Basic, Medical, Renewal and Attendant application. Phase 1 will go into effect operationally in 2025.
 - The Defective Card application will continue to only be submitted in-person, due to the requirement for transit agency staff to physically tap and test the card to deem it defective.
- Phase 2 will allow applicants to submit the Replacement Card Application, which has an application fee. This phase will become operational after the completion of integration that allows for payment acceptance.

Issues:

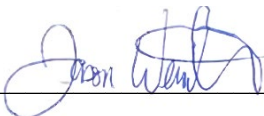
None identified.

Recommendation:

Staff recommends that the Board approve an expanded operational policy to the RTC Clipper Access program to allow customers to submit applications online, as described above.

Attachments:

None.



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #:	24-0809	Version:	1	Name:	
Type:	Report	Status:		Consent	
File created:	5/30/2024	In control:		Clipper Executive Board	
On agenda:	6/24/2024	Final action:			
Title:	Clipper® MOU Provisions and Reimbursing Transit Agencies for Lost Fare Revenue				

The Clipper Memorandum of Understanding (MOU) contains provisions setting forth how revenue generated by the Clipper program is to be applied. This Agenda Item focuses on the line item in the FY 23-24 Clipper Operating Budget that allocates \$200,000 of the interest income generated by investment of the Clipper float account for reimbursing transit agencies for lost fare revenue due to Clipper system operational problems, and addressing that budgetary allocation in light of the provisions of the Clipper MOU.

Sponsors:

Indexes:

Code sections:

Attachments: [2c Clipper MOU Provisions and Reimbursing Transit Agencies for Lost Fare Revenue](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® MOU Provisions and Reimbursing Transit Agencies for Lost Fare Revenue

The Clipper Memorandum of Understanding (MOU) contains provisions setting forth how revenue generated by the Clipper program is to be applied. This Agenda Item focuses on the line item in the FY 23-24 Clipper Operating Budget that allocates \$200,000 of the interest income generated by investment of the Clipper float account for reimbursing transit agencies for lost fare revenue due to Clipper system operational problems, and addressing that budgetary allocation in light of the provisions of the Clipper MOU.

Presenter:

Jason Weinstein, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

June 24, 2024

Agenda Item 2c

Clipper® MOU Provisions and Reimbursing Transit Agencies for Lost Fare Revenue

Subject:

The Clipper Memorandum of Understanding (MOU) contains provisions setting forth how revenue generated by the Clipper program is to be applied. This Agenda Item focuses on the line item in the FY 23-24 Clipper Operating Budget that allocates \$200,000 of the interest income generated by investment of the Clipper float account for reimbursing transit agencies for lost fare revenue due to Clipper system operational problems, and addressing that budgetary allocation in light of the provisions of the Clipper MOU.

Background:

The MOU addresses the use of revenue generated by the Clipper program, but does not provide for the use of revenue, such as revenue generated by investment of the Clipper float account, to be used for the purpose of reimbursing transit agencies for fares lost due to Clipper system operational problems. However, after substantial outreach and meetings with transit operator staff on this potential use of funds and receiving positive feedback, Clipper staff included \$200,000 for reimbursement of transit agency claims for such lost fare revenue in the FY 23-24 Clipper Operating Budget. Staff plans to perform additional outreach to transit operators on this issue and continue with the reimbursement of transit agencies for their claims of lost fare revenue, using the already-allocated \$200,000 of interest earned from investment of the Clipper float account. Ultimately, in the future the MOU will need to be updated to address this and other issues that require clarity.

Transit agency claims submitted for reimbursement of lost fare revenue exceeds the \$200,000 allocated for the purpose. Thus, Clipper staff have evaluated and identified, through the assistance of MTC's Funding and Programming staff, a source of funding for an additional \$200,000. This will bring the total available funds for reimbursement for lost fare revenue to \$400,000. This additional funding source will be used so that all operator claims that have been submitted to date can be fully reimbursed rather than only partially reimbursed in some manner.

Staff expect this additional \$200,000 in funding can be allocated in July and would be available shortly thereafter to directly reimburse operator claims.

Issues:

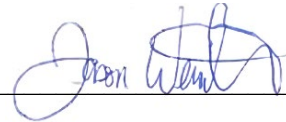
None identified.

Recommendation:

None. This is an information item only.

Attachments:

None.



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0806 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 5/30/2024 **In control:** Clipper Executive Board

On agenda: 6/24/2024 **Final action:**

Title: Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the current and Next Generation Clipper System (C2). Contractor Cubic Transportation Systems will be in attendance.

Sponsors:

Indexes:

Code sections:

Attachments: [3a Clipper Schedule and Implementation and Deployment Update](#)
[3ai CEB Status Report](#)
[3aii CEB June 2024 - Cubic Update](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the current and Next Generation Clipper System (C2). Contractor Cubic Transportation Systems will be in attendance.

Presenter:

Jason Weinstein, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

June 24, 2024

Agenda Item 3a

Clipper® Schedule, Implementation, and Deployment Update

Subject:

Update on key developments related to the implementation of the Next Generation Clipper System (C2)

Background:

C2 Project Schedule

At the May 20, 2024 meeting of this Board, staff reported that the start of Customer Transition to C2 operations is being deferred beyond the summer of 2024 and that we would report back to this Board by September 2024 as we gained more schedule certainty. Board members also wanted to hear from Cubic, our next generation Clipper system integrator contractor. Matt Newsome, Cubic's Senior Vice president and General Manager, will be on hand to provide an update (see attachment B) and to answer questions. Since May, MTC and transit operators have made progress on finalizing the business rules to be implemented for transition and providing comments on pre-transition test procedures from Cubic, the C2 System Integrator. Cubic has also made progress on addressing issues identified in the initial pilot test through additional software development, testing and releases. MTC is also working with Cubic to identify and document key dependencies on Cubic's schedule by other parties – including MTC, other C2 Contractors, transit operators, and third-party project partners – to help Cubic prioritize their project delivery. Staff will continue to monitor pre-transition system development, configuration, and testing, and we will report back to this Board on progress towards determining a new target date for the start of Customer Transition.

C2 Schedule Risks

From the list of risks identified in last month's update, Cubic has made progress on addressing issues identified in the initial pilot, and some issues such as configuration of back-office component access are no longer considered high risk. MTC continues to work with Cubic, transit

operators, and other partners to make progress in addressing the remaining identified high-priority risks:

- Completion of all hardware installation, including installation projects by transit operators (e.g., BART network deployment and station TR4 installations), and the delivery of Cubic-provided training materials by transit operators to their staff on the operations and maintenance of the new hardware.
- Coordination of the various project components with multiple contractors (e.g., working with the customer service contractor, fare media and services suppliers, and transit agency vendors for integration with ticket machines and computer-aided dispatch / automatic vehicle location (CAD/AVL) systems).
- Availability of next-generation system fare media for the completion of software development and testing.
- Completion of production environment testing to confirm system configuration is correct before the start of pre-Transition pilot testing.

C2 Implementation

Included as Attachment A to this memorandum is a summary of recently completed activities related to delivering the next-generation system; upcoming activities and deliverables for MTC, Cubic, and the transit operators; and other noteworthy items managed by the project team.

C2 Equipment Deployment

Installation of stand-alone platform readers has been completed. On-board Clipper readers are substantially complete on all operators except for the WestCAT installation, which will start on June 20th with completion anticipated by the end of July. BART continues to make progress with the installation of next-generation readers (TR4s) at its fare gates and is testing Cubic's release of production-ready software for its ticket machines. Cubic will begin installation of SFMTA fare gate readers this summer.

Issues:

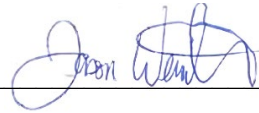
None identified.

Recommendations:

Information

Attachments:

- Attachment A: Next Generation Clipper Program Executive Summary Status Report
- Attachment B: Cubic Updates June 2024



Jason Weinstein

Next Generation Clipper Program

Executive Summary Status Report – June 24, 2024



Summary

- Regionwide installation of onboard validators nearing completion. BART fare gate validator installation continues; BART TVM validator testing in progress.
- Testing of initial pilot test issue bug fixes ongoing. Review of pre-Transition System Integration Testing (SIT) procedures continues.
- Technical and planning discussions continue with operators on various topics, including new device installation, BART coordination, and paratransit/third-party integration.
- Joint coordination meetings ongoing between MTC and C2 Contractors Cubic (System Integrator and Fare Media Fulfillment), WSP (Customer Service Center), Fiserv (Payment Services), Paragon (C2 Fare Card Supplier), and Confidex (C2 Fare Ticket Supplier).

Recently Completed Activities

	MTC/Arcadis	Cubic	Operators	Date
• New Devices:				
○ Regionwide installation (cont'd)	●	●	●	ongoing
○ BART fare gate validator installation (cont'd)	●	●	●	ongoing
• Account-based System Testing:				
○ Pre-Transition SIT procedures review	●		●	ongoing

Upcoming Activities/Deliverables

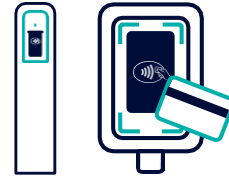
	MTC/Arcadis	Cubic	Operators	Date
• New Devices:				
○ BART TVM validator testing (cont'd.)	●	●	●	ongoing
○ BART fare gate installation (cont'd.)	●	●	●	ongoing
• Account-based System Testing:				
○ Pre-Transition SIT procedures review	●		●	Jun–Jul
○ Pre-Transition SIT witnessing	●	●	●	Jul–Sep
• Account-based System Documentation:				
○ O&M Documents resubmittal review	●		●	Jul
○ Submittal of Manuals & Training Materials		●		Jun/Jul
○ Manuals & Training Materials review	●		●	Jul
• Clipper Executive Board Meeting	●		●	Jul 22

Clipper Executive Board – Cubic Updates (June 2024)



Virtual Cards

- » Virtual Media now being used for over 30% of taps each month
- » 60k to 90k new virtual cards each month
- » 94% customer satisfaction with mobile per MTC report
- » Enables 'instant' loading which was a top customer compliant.



Installations

- » 3,400+ out of 3,544 vehicles completed
- » 20 agencies 100% complete with Validator installs
- » 15 of 16 integrations with agency CAD/AVL integrations complete
- » 242 of 248 retail locations equipped with C2 devices
- » 5 pilot inspection devices expected to be delivered to MTC in June
- » Faregate installs complete at 15 BART stations (out of 52). (approx. 300 new readers)



Open Payments

- » 5 agencies supporting open payments in pilot mode today
- » Base fares (i.e. adult fares, no transfers)



Back Office Testing

- » Installation dry runs being rehearsed in test lab
- » Configuration & integration to continue until pilot start
- » Risk reduced as this is the 2nd run through all tests
- » All issues will be addressed in real time
- » Transition-ready applications planned for production release in July
- » Once July update is complete, will need close collaboration with all other MTC C2 contractors – call center, cards, payments, 3rd party suppliers, etc. required for transition launch



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0807 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 5/30/2024 **In control:** Clipper Executive Board

On agenda: 6/24/2024 **Final action:**

Title: Current Clipper® Operations and Performance Update

Update on current Clipper system operations and performance

Sponsors:

Indexes:

Code sections:

Attachments: [3b Current Clipper Operations and Performance Update](#)

Date	Ver.	Action By	Action	Result
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Subject:

Current Clipper® Operations and Performance Update

Update on current Clipper system operations and performance

Presenter:

Akash Ghosal, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

June 24, 2024

Agenda Item 3b

Current Clipper® Operations and Performance Update

Subject:

Update on current Clipper System operations and performance

Background:

Transaction and Sales

In May 2024, Clipper processed over 14 million transactions and settled over \$33 million in revenue, an increase of 12% and 13%, respectively, compared to May 2023.

Clipper Mobile Card Adoption and Usage

Since the launch of the mobile Clipper card in April 2021, almost 2.8 million mobile Clipper cards have been created, and staff has noted a steady increase in both the number and percentage of trips taken using a Clipper mobile card. In May 2024 alone, over 31% of Clipper trips were taken using a mobile card, compared to 25% in April 2023.

Clipper START Card Issuance and Usage

In May 2024, the program received 97% more Clipper START applications compared to May 2023, and Clipper START trips increased by 96% over the same time period.

Quarterly Fare Change Deadline

Fare changes and updates are scheduled to occur quarterly to limit demands on development and testing resources as work continues on developing the Next Generation Account-based System. The deadline for requesting fare changes for January 1, 2025 is October 1, 2024.

Issues:

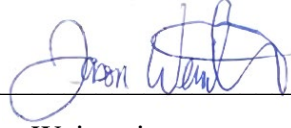
None identified.

Recommendations:

Information.

Attachments:

- None



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 24-0808 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 5/30/2024 **In control:** Clipper Executive Board

On agenda: 6/24/2024 **Final action:**

Title: Next Generation Clipper® Marketing and Communications Plan

Update on Next Generation Clipper Marketing and Communications Plan

Sponsors:

Indexes:

Code sections:

Attachments: [3c Clipper Executive Board Summary Sheet Communications Plan](#)
[3ci Next Generation Clipper Marketing and Communications Plan](#)

Date	Ver.	Action By	Action	Result
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Subject:

Next Generation Clipper® Marketing and Communications Plan

Update on Next Generation Clipper Marketing and Communications Plan

Presenter:

Lysa Hale, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

June 24, 2024

Agenda Item 3c

Next Generation Clipper® Marketing and Communications Plan

Subject:

Update on Next Generation Clipper Marketing and Communications Plan

Background:

With the launch of the Next Generation Clipper Account-based System rapidly approaching, MTC will be engaging with transit operators and their marketing and customer service staff about plans for the pre-launch, launch and post-launch periods. We are working on a “living” marketing plan that we will continue to share with marketing and communications staff in the coming weeks.

The goals of the marketing plan are to:

- Build awareness of the next generation of Clipper
- Clearly convey next-generation features and benefits
- Increase preparedness for system changes
- Clarify benefits of investment in Next Generation System
- Instill confidence in Clipper to meet today’s needs as well as its ability to evolve to meet future needs.

The marketing plan includes:

- Identification of audiences, including existing Clipper customers, new Clipper customers, visitors to the Bay Area, monolingual non-English speakers, stakeholders, partners, and more.
- Key challenges, such as resistance to change and confusion about nuances of new system.
- Tone, intended to be helpful, upbeat and inclusive.
- Our content strategy includes:
 - Anticipation of frequently asked questions and customer challenges
 - Orientation of new features using imagery and videos
 - A mix of campaign messages focused on the new system

- Messaging, which will include:
 - Assurance that it's still Clipper
 - Addressing changes, such as no balance shown on card readers
 - Emphasis on choices available, such as plastic cards, contactless bank cards, and cards in phone wallet (including Clipper and bank cards)
 - Introduction to new transfer discount
 - Greater ability for group travel
- Marketing tactics will include transit advertising, additional out-of-home advertising (such as billboards, signage, etc.), newspapers, paid digital advertising, organic and paid social media, outreach, educational videos, media relations, and marketing collateral.
- Transit partnerships will be a key part of the communications effort, including donation of space on vehicles and in stations, promotion on agency social media and website, distribution of print materials, and more. MTC will provide a toolkit including graphics, photos, and sample messaging for all distribution channels.
- We are placing a special emphasis on social media, using Facebook, X, YouTube, Instagram and Reddit.
- Key will be strategic messaging, responding to posts quickly (continuing current practice), using hashtags to index topics and generate interest, and combining organic and paid posts to extend reach.
- Additional tactics could include Ask Me Anything sessions, Facebook/Instagram Live, crowdsourcing, influencer campaigns, and more.

In addition, MTC is working on “what if” scenarios that address issues that might arise and how they might be handled from a communications perspective.

MTC has shared a presentation on the plan with transit operator customer service and education staff and in the Blue Ribbon Task Force Transit Marketing and Communications Committee meeting. MTC also regularly works with a representative marketing advisory committee for review of advertising strategies; MTC met with group twice to discuss the plan, and they reviewed and provided detailed feedback on it.

If you have any questions, please reach out to lhale@bayareametro.gov.

Issues:

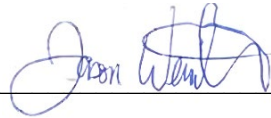
None identified

Recommendation:

None

Attachments:

- Attachment A: PowerPoint Presentation – CEB Next Generation Clipper Marketing and Communications Plan



Jason Weinstein

CLIPPER[®]

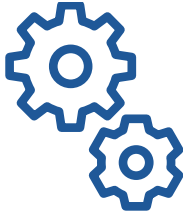
Next Generation Marketing and Communications Plan Overview

Clipper Executive Board

June 24, 2024



Introduction



In development since 2015...

Even with 95% satisfaction, the new system will address expressed needs and expectations of Bay Area users.

- ▶ Real-time value availability, see and use value immediately
- ▶ Ability to maintain multiple balances, manage others' cards
- ▶ Online discount card applications
- ▶ New payment option: contactless bank cards





Marketing Goals

- ▶ Build awareness of the next generation of Clipper
- ▶ Clearly convey next-generation features and benefits
- ▶ Increase preparedness for system changes
- ▶ Clarify benefits of investment in Next Generation System
- ▶ Instill confidence in Clipper to meet today's needs as well as its ability to evolve to meet future needs



Audiences (1/3)

GROUP 1: CUSTOMERS



- ▶ Existing
- ▶ General/New
- ▶ Visitors
- ▶ Seniors
- ▶ Youth (or parents)
- ▶ Caregivers
- ▶ Disabled individuals, Paratransit riders
- ▶ Spanish-, Chinese-, and Vietnamese-speaking riders



Audiences (2/3)

GROUP 2: STAKEHOLDERS



- ▶ Commission
- ▶ Section Directors and Other Staff
- ▶ Transit Agency Staff
- ▶ Transit Agency Board Members
- ▶ State Legislators



Audiences (3/3)

GROUP 3: PARTNERS



- ▶ Paratransit Operators
- ▶ Private Transportation Companies (e.g., bikeshare operators)
- ▶ Transit Benefit Providers
- ▶ Clipper Retailers
- ▶ CBOs
- ▶ Housing Developments
- ▶ Colleges and Universities
- ▶ Employers





Potential Challenges

- ▶ People who are currently happy with Clipper may resist change
- ▶ Customer confusion at login when account looks different
- ▶ Additional confusion at nuances and changes to the system
 - *Card balance no longer visible at card readers, e.g.*
- ▶ Limited direct access to customers, opt-in list only
- ▶ People may be confused about what acceptable payment methods





Marketing Approach



Style & Tone

- ▶ **Helpful:** Demonstrate knowledge and a willingness to educate people about Clipper features and functionality
- ▶ **Upbeat:** Be positive and eager to share the benefits of the new system
- ▶ **Inclusive:** Be of service to all members of the public
 - Facilitate a space to belong to as a member of a transit-riding community
 - Offer equal access to information among people with disabilities and limited English proficiency





Content Strategy

- ▶ Anticipate frequently-asked questions and customer challenges
 - *Provide customer education and information to resolve issues quickly.*
- ▶ Orient customers to new features through **imagery and videos**
- ▶ Publish a **mix of campaign messages** focused on the new system
 - *Include evergreen messaging promoting general Clipper benefits.*





Content Topics

▶ **Clip's Tips** educational videos

▶ **Additional Topics:**

- *Ways to check your balance*
- *Ways to add value*
- *New system features*
- *Clipper discounts*
- *Discounted transfers*
- *Benefits of Clipper card registration*
- *Auto-Reload*
- *Visitors' Guide to Clipper*





Messaging

- ▶ ***The next generation of Clipper: The same system, only better!***
 - *Add value and use it immediately*
 - *Manage multiple Clipper cards from one online account*
- ▶ ***More choices: Pay fares with a Clipper card, bank card or phone***
- ▶ ***Discounts: New transfer discount***
- ▶ ***Ride together: Travel as a group with Clipper mobile tickets***





Marketing Tactics (1/3)

- ▶ Transit Advertising (donated and paid)
 - *e.g., interior car cards, exterior bus ads, transit shelters, in-station digital signs*
- ▶ Additional Out-of-Home Advertising
 - *e.g., billboards (print or digital), kiosks (print or digital), broadcast radio, direct mail*
- ▶ Newspapers
 - *To reach in-language audiences and older adults*
- ▶ Paid Digital Advertising
 - *e.g., display ads, SEM/Adwords; streaming radio, video, TV*





Marketing Tactics (2/3)

▶ Organic Social Media

- *e.g., posts, stories, "Live" streaming video, Ask Me Anything (AMA), shares/retweets*

▶ Paid Social Media

- *Paid promotions, boosted posts, etc.*

▶ Clipper Outreach Ambassadors

- *e.g., pop-up or intercept events; partnerships with CBOs, accessibility and community advisory groups*





Marketing Tactics (3/3)

▶▶ Informational Videos

- *“Clip’s Tips” posted on Clipper website, social media networks, and partner channels*

▶▶ Media Relations

- *Press releases, media pitching, press conferences*

▶▶ Marketing Collateral

- *Brochures, palm cards, giveaways*





Transit Partnerships

- ▶ Extend reach through Bay Area transit agencies and other partners
- ▶ Provide Clipper Next Generation Launch Marketing Toolkits
 - Social media post content (post copy, image, link)
 - Webpage graphics
 - Electronic sign messages
 - Short and long newsletter articles for email marketing, websites and blogs
 - Printed collateral: brochures (Insider's Guide), outreach flyers/palm cards





Social Media Strategy (1/4)

▶ Social Media Goals

- Leverage social media networks (organic and paid) to increase awareness of next-generation Clipper launch.
- Increase **preparedness** for system changes via social media engagement to educate existing customers.
- Offer social media options for **customer service** comments and inquiries





Social Media Strategy (2/4)

- ▶ **Current Platforms:** Facebook, X, YouTube
- ▶ **New Platforms:** Instagram, Reddit

Reddit

- **Set up a Bay Area Clipper subreddit**
- Moderate customer service inquiries
- Encourage users to post to the Clipper subreddit to increase customer engagement and help disseminate credible Clipper information





Social Media Strategy (3/4)

- ▶ Offer **timely responses to social media comments**, manage Clipper online communities
- ▶ **Use hashtags** to index content topics and to generate interest
- ▶ Combine organic posts and paid advertising to widen reach
 - Place ads on Facebook, Instagram, X, YouTube and TikTok
 - Use **targeting strategies** to distribute content to diverse audiences





Social Media Strategy (4/4)

▶ Additional Tactics

- *Share videos*
- *Ask Me Anything (AMA) Sessions*
- *Facebook/Instagram Live*
- *Crowdsourcing*
- *Influencer Campaigns*
- *Tuesday Tips*
- *Friday Fun*
- *Online quizzes*
- *Share/retweet content from transit agencies*



Thank you!

The background features a solid blue color with several overlapping, semi-transparent triangles in various shades of blue, ranging from light to dark. The triangles are arranged in a way that creates a sense of depth and movement, with some pointing upwards and others downwards.