



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

Meeting Agenda

Clipper Executive Board

Robert Powers, Chair

April Chan, Vice Chair

Monday, January 27, 2025

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.

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://bayareametro.zoom.us/j/89107185761>

iPhone One-Tap: US: +16694449171,,89107185761# US
+16699006833,,89107185761# 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)
Webinar ID: 891 0718 5761

International numbers available: <https://bayareametro.zoom.us/u/kbmoaWBRIE>

Detailed instructions on participating via Zoom are available at:

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

<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. 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, Kathleen Kelly, Julie Kirschbaum, Denis Mulligan, and Christy Wegener.****1. Call to Order / Roll Call / Confirm Quorum**

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

2. Consent Calendar

- 2a.** [25-0076](#) Minutes of the December 16, 2024 Meeting
- Action:** Approval
- Attachments:** [2a 25-0076 2024 12 16 CEB Minutes DRAFT](#)
-
- 2b.** [25-0163](#) Reallocation of Funding Source - Next Generation Clipper® Customer Service Center - WSP USA Services, Inc. (\$2,000,000)
- Request for reallocation of a funding source with WSP USA Services, Inc. for the development of the Next Generation Clipper Customer Service Center.
- Action:** Approval
- Presenter:** Lysa Hale, MTC
- Attachments:** [2b 25-0136 Clipper® Contract Change Order for WSP \(\\$2,000,000\)](#)
-
- 2c.** [25-0164](#) Current Clipper® Operations and Performance Update
- Update on current Clipper System Operations and Performance Information
- Action:** Information
- Presenter:** Akash Ghosal
- Attachments:** [2c 25-0164 Current Clipper Operations and Performance Update](#)

3. Information

3a. [25-0086](#) Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the Next Generation Clipper System (C2). Senior Staff from Cubic Transportation Systems will provide a system integrator progress report.

Action: Information

Presenter: Jason Weinstein, MTC and Cynthia Eng, and Anthony DeVito, Cubic Transportation Systems

Attachments: [3a 25-0086 1 Clipper Schedule and Implementation Update](#)
 [3a 25-0086 2 CEB Status Report 2025-01-27](#)
 [3a 25-0086 3 Clipper Schedule Attachment](#)

3b. [25-0087](#) Next Generation Clipper® Transition Plan and Overview
Update on plan to transition current Clipper cardholders to the Next Generation account-based system, including a request for Board comments and guidance.

Action: Information

Presenter: Edward Meng, MTC

Attachments: [3b 25-0087 1 Clipper Transition Update](#)
 [3b 25-0087 2 C1 Transition Summary](#)

4. 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 is scheduled to be held on Monday February 24, 2025 1:00 p.m. at BART, 1st Floor Board Room, 2150 Webster Street, Oakland CA 94612. 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 #: 25-0076 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 12/19/2024 **In control:** Clipper Executive Board
On agenda: 1/27/2025 **Final action:**
Title: Minutes of the December 16, 2024 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [2a_25-0076_2024_12_16_CEB_Minutes_DRAFT](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

Subject:
Minutes of the November 16, 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, December 16, 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 Board Room - 1st Floor, BART, 2150 Webster Street, Oakland CA 94604. 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/83789185699>
iPhone One-Tap: US: +16699006833,,83789185699# US (San Jose)
Or Dial: 833 548 0282 US Toll Free

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)
Webinar ID: 837 8918 5699

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>

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. 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, Denis Mulligan, Jeffrey Tumlin, Christy Wegener and vacant.

1. Call to Order / Roll Call / Confirm Quorum

Ahsan Baig, AC Transit attended the meeting as a Non-Voting Member.

Present: 7 - Chair Powers, Vice Chair Chan, Board Member Fremier, Board Member Gonot, Board Member Mulligan, Board Member Tumlin, and Board Member Wegener

Absent: 1 - Board Member Cumins

2. Consent Calendar

Upon the motion by Board Member Mulligan and seconded by Vice Chair Chan, the Consent Calendar was unanimously approved. The motion carried by the following vote:

Aye: 7 - Chair Powers, Vice Chair Chan, Board Member Fremier, Board Member Gonot, Board Member Mulligan, Board Member Tumlin and Board Member Wegener

Absent: 1 - Board Member Cumins

2a. [24-1599](#) Minutes of the November 18, 2024 Meeting

Action: Approval

Attachments: [2a 24-1599 2024 Minutes of the November 18, 2024 Meeting](#)

2b. [24-1603](#) Clipper® Contract Change Order Amendment - Statement on Standards for Attestation Engagement (SSAE) No. 18 Annual Audit of Clipper Program: Cubic Transportation Systems, Inc. (Cubic) (\$200,000)

Action: Approval

Presenter: Albert Chiu, MTC

Attachments: [2b 24-1603_SClipper® Contract Change Order Amendment](#)

2c. [24-1602](#) Current Clipper® Operations and Performance Update

Action: Information

Presenter: Akash Ghosal, MTC

Attachments: [2c 24-1602 Current Clipper Operations and Performance Update](#)

3. Information

3a. [24-1600](#) Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the Next Generation Clipper System (C2). Senior Staff from Cubic Transportation Systems will provide a system integrator progress report.

Action: Information

Presenter: Jason Weinstein, MTC; Cynthia Eng, and Anthony DeVito, Cubic Transportation Systems

Attachments: [3a 24-1600 1 Clipper Schedule and Implementation Update 2024-12-16](#)
[3a 24-1600 2 CEB Status Report 2024-12-16](#)
[3a 24-1600 3 Clipper Schedule Attachment](#)

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

3b. [24-1601](#) Next Generation Clipper® Transition Plan and Overview

Plan to transition current Clipper cardholders to the Next Generation account-based system, including an overview of the new features, functions, and capabilities of the account-based system and their availability.

Action: Information

Presenter: Edward Meng, MTC

Attachments: [3b 24-1601 1 Clipper Transition Update](#)
[3b 24-1601 2 C1 Transition Summary](#)

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

4. Executive Director's Report – Weinstein

5. Public Comment / Other Business

The following individuals spoke on this Item:
Aleta Dupree.

6. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board is scheduled to be held on Monday January 27, 2025, 1:30 p.m. at BAMC, 1st Floor Board Room, 375 Beale Street, San Francisco CA 94105. 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 #: 25-0163 **Version:** 1 **Name:**

Type: Report **Status:** Consent

File created: 1/14/2025 **In control:** Clipper Executive Board

On agenda: 1/27/2025 **Final action:**

Title: Reallocation of Funding Source - Next Generation Clipper® Customer Service Center - WSP USA Services, Inc. (\$2,000,000)

Request for reallocation of a funding source with WSP USA Services, Inc. for the development of the Next Generation Clipper Customer Service Center.

Sponsors:

Indexes:

Code sections:

Attachments: [2b 25-0136 Clipper® Contract Change Order for WSP \(\\$2,000,000\)](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

Subject:

Reallocation of Funding Source - Next Generation Clipper® Customer Service Center - WSP USA Services, Inc. (\$2,000,000)

Request for reallocation of a funding source with WSP USA Services, Inc. for the development of the Next Generation Clipper Customer Service Center.

Presenter:

Lysa Hale, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

January 27, 2025

Agenda Item 2b

Reallocation of Funding Source – Next Generation Clipper® Customer Service Center – WSP USA Services, Inc.

Subject:

Request for reallocation of a funding source with WSP USA Services, Inc. for the development of the Next Generation Clipper Customer Service Center.

Background:

After a competitive procurement, WSP USA Services, Inc. (WSP) was selected in May 2021 to serve as the Customer Service Center (CSC) vendor for the Next Generation Clipper regional fare payment system. Work commenced in the summer of 2021. The scope of work includes Installation, Testing and Training, and Transition phases.

WSP has flagged the risk of increased costs due to the extended Next Generation Clipper system delivery schedule. The Project Readiness Milestones where the contractor demonstrates readiness for Pre-Transition Pilot Test has shifted to February 18, 2025.

In mitigation discussions, MTC and WSP agreed to adjust Project Readiness terms and conditions to address ongoing risks. WSP cannot move into full operations until the Next Generation Clipper system is deployed, CSC has demonstrated Project Readiness, all training is completed, and CSC staffing has increased to full operations level.

As part of MTC's mitigation approach and changes in Project Readiness terms and conditions, MTC reclassified the First Nine-Months of Time and Materials phase from an operating to a capital expense. Staff recommends modifying the capital budget to reallocate \$2,000,000 in operating funds to capital. The reallocation has been approved by the MTC Regional Network Management Committee at its January 10, 2025 meeting.

Issues:

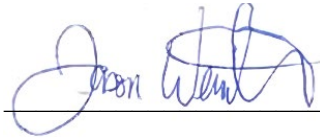
None identified.

Recommendation:

Staff recommends that the Clipper Executive Board approve a Change Order with WSP USA Services, Inc. to reallocate an amount not to exceed \$2,000,000 in operating funds to capital, to provide support for the Next Generation Clipper Customer Service Center.

Attachments:

None



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0164 **Version:** 1 **Name:**

Type: Report **Status:** Consent

File created: 1/14/2025 **In control:** Clipper Executive Board

On agenda: 1/27/2025 **Final action:**

Title: Current Clipper® Operations and Performance Update

Update on current Clipper System Operations and Performance

Sponsors:

Indexes:

Code sections:

Attachments: [2c 25-0164 Current Clipper Operations and Performance Update](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

Subject:

Current Clipper® Operations and Performance Update

Update on current Clipper System Operations and Performance

Presenter:

Akash Ghosal

Recommended Action:

Information

Attachments:

Clipper® Executive Board

January 27, 2025

Agenda Item 2c

Current Clipper® Operations and Performance Update

Subject:

Update on current Clipper System operations and performance

Background:

Transaction and Sales

In December 2024, Clipper processed over 12.7 million transactions and settled over \$29 million in revenue, an increase of 10.2% and 11.9%, respectively, compared to December 2023.

Clipper Mobile Card Adoption and Usage

Since the launch of the mobile Clipper card in April 2021, over 3.5 million mobile Clipper cards have been created, and staff have noted a steady increase in both the number and percentage of trips taken using a Clipper mobile card. In December 2024 alone, 34% of Clipper trips were taken using a mobile card, compared to 28% in December 2023.

Clipper START Card Issuance and Usage

In December 2024, the program received 63% more Clipper START applications compared to December 2023, and Clipper START trips increased by 120% over the same time period.

Issues:

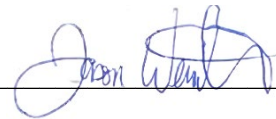
None identified.

Recommendations:

Information.

Attachments:

- None



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0086 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 12/19/2024 **In control:** Clipper Executive Board

On agenda: 1/27/2025 **Final action:**

Title: Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the Next Generation Clipper System (C2). Senior Staff from Cubic Transportation Systems will provide a system integrator progress report.

Sponsors:

Indexes:

Code sections:

Attachments: [3a 25-0086 1 Clipper Schedule and Implementation Update](#)
[3a 25-0086 2 CEB Status Report 2025-01-27](#)
[3a 25-0086 3 Clipper Schedule Attachment](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

Subject:

Clipper® Schedule, Implementation, and Deployment Update

Update on key developments related to the implementation of the Next Generation Clipper System (C2). Senior Staff from Cubic Transportation Systems will provide a system integrator progress report.

Presenter:

Jason Weinstein, MTC and Cynthia Eng, and Anthony DeVito, Cubic Transportation Systems

Recommended Action:

Information

Attachments:

Clipper® Executive Board

January 27, 2025

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). Senior staff from Cubic Transportation Systems will provide a system integrator progress report.

Background:

Next Generation Project Schedule

Since the last Clipper Executive Board meeting on December 16, we have continued to make progress on the tasks identified over the last few months to maintain the planned Spring start of customer transition. We have completed witnessing 44 of the 51 system components covered by formal System Integration Testing, and Cubic projects that testing will be substantially completed by the end of January 2025. We are trending in the right direction, but risks to making the schedule persist as testing continues to show areas that need further attention, and ticket vending machine integration requires additional work. As has been reported each month since September 2024, until the risks have been eliminated or significantly reduced, we cannot project a firm schedule date. The go-right schedule has been updated to reflect the status of where the integration of multiple parts stands now.

The schedule critical path continues to run through system integration testing, mobile wallet integration, and Ventek ticket vending machine deployment. These items continue to be the tasks driving our schedule risks. A new risk has been added, related to production field testing. If field testing indicates application changes are required, it will have a material impact to the schedule. Since these remaining risks are still open, and we want to preserve the current customer experience, at this time we cannot provide a date certain for the Start of Customer Transition.

Below is an update to the reported items that needed to be accomplished in the 30 days following the December 16 CEB meeting to preserve the schedule:

- Substantial completion of System Integration Testing
 - SIT witnessing sessions were held for 44 of the 51 components. The current estimated time of completion is the end of January, with some additional testing to occur in early February.
- Start field readiness in production environment
 - Mobile Wallets
 - Some limited production testing has been completed, but not ready for field testing
 - Ventek TVM (Caltrain, GGBHTD, SMART, VTA)
 - Ventek has made continued iterative progress with Cubic's assistance, however more work is necessary to facilitate testing in production
 - BART and SFMTA gates and ticket vending machines
 - BART gates and TVMs have been working in production
 - SFMTA gates have been working in production
- Begin station installation of BART ticket vending machines (TVMs) and add-fare machines
 - BART and Cubic resolved the TVM issues in the BART lab and at the pilot installation at the 19th Street Oakland station.
 - Add-fare machine work is on-going
 - Station installation of TVMs and gates is underway

In the next 30 days we plan to complete the following items:

- Fix tests that did not pass in System Integration Testing
- Perform significant field testing in production environment
 - Back office, Business rules, Customer support, Existing and new cards
 - Mobile wallets
 - Ventek ticket vending machines (TVMs) (Caltrain, GGBHTD, SMART, VTA)
 - SFMTA and BART Gates and TVMs
- Station installation at BART gates, TVMs, and AVMs

Staff will continue to monitor and assist with expediting ongoing activities in advance of the Pilot and Customer Transition. We will report back to this Board in January on the progress to reduce the schedule risks, and towards establishing a more certain date for the start of Customer Transition.

C2 Schedule Risks

One risk has been removed from the original list and one new one (Field Testing) has been added. MTC continues to work with Cubic, transit operators, and other partners to address the following high-priority risks:

- ~~Completion of the dry-run phase of lab testing~~
- System Integration Testing finalization
- Fare Gate integration and installation
- Ticket Vending Machine integration and installation with BART and regionally with Ventek
- Integration with the phone provider payment wallets
- Field Testing – No code changes required

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

The installation of on-board Clipper readers and stand-alone platform readers has been substantially completed. BART continues to make progress with the installation of next-generation readers (TR4s) at its fare gates and its ticket vending machines.

C2 Testing

The completion of testing will be followed by field testing in the production environment, then followed by the Pre-Transition Pilot.

Issues:

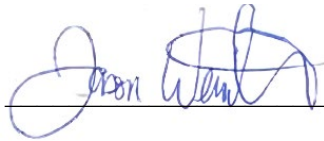
Schedule risks described above

Recommendations:

Information

Attachments:

- Attachment A: Next Generation Clipper Program Executive Summary Status Report
- Attachment B: Next Generation Clipper Program Schedule Presentation



Jason Weinstein



Next Generation Clipper Program

Executive Summary Status Report – January 27, 2025

Summary

- Pre-Transition System Integration Testing (SIT) continues.
- BART and Muni fare gate validator installation continues.
- BART ticket vending machine (TVM) validator installation underway.
- Preparing to resume Fare Inspection device deliveries and start installation of Customer Service Terminals.
- Manuals and Training Materials under revision by Cubic to address comments from MTC and transit operator review.
- Technical and planning discussions continue with operators on various topics, including new equipment delivery and training, transition planning, 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:				
○ BART fare gate validator installation (cont'd)	●	●	●	ongoing
○ Muni fare gate validator installation (cont'd)	●	●	●	ongoing
• System Integration Test Witnessing:				
○ Customer Service Website	●	●	●	Dec 17
○ BART fare gates	●	●	●	Dec 18
○ Mobile App	●	●	●	Dec 18–19
○ Sonoma County Transit fare rules	●	●	●	Dec 19
○ SAP Reports	●	●	●	Dec 20
○ Fare inspection device (part 1)	●	●	●	Dec 23
○ Operator Control Unit	●	●	●	Dec 27
○ Customer Service Terminal (part 1)	●	●	●	Jan 9
○ Retail device (part 1)	●	●	●	Jan 10
○ Inventory Management System	●	●	●	Jan 13
○ BART Add Fare Machine	●	●	●	Jan 14
○ Mobile Wallet	●	●	●	Jan 22 (planned)
○ BART Ticket Vending Machine	●	●	●	Jan 22 (planned)
○ Power BI Reports	●	●	●	Jan 23 (planned)
○ Retail device (part 2)	●	●	●	Jan 23 (planned)
○ Fare inspection device (part 2)	●	●	●	Jan 24 (planned)
• Account-based System Documentation:				
○ O&M Documents resubmittal review	●		●	Dec 16

Upcoming Activities/Deliverables

	MTC/Arcadis	Cubic	Operators	Date
• New Devices:				
○ BART fare gate validator installation (cont'd)	●	●	●	ongoing
○ BART TVM validator installation (cont'd)	●	●	●	ongoing
○ Muni fare gate validator installation (cont'd)	●	●	●	ongoing
○ Fare inspection device deliveries (cont'd)	●	●	●	ongoing
○ Customer Service Terminal installation	●	●	●	Jan–Apr

	MTC/Arcadis	Cubic	Operators	Date
<ul style="list-style-type: none"> • System Integration Test Witnessing: <ul style="list-style-type: none"> ○ Pre-Transition SIT execution (cont'd) 	•	•	•	ongoing
<ul style="list-style-type: none"> • Account-based System Documentation: <ul style="list-style-type: none"> ○ Manuals & Training Materials resubmittal review (cont'd) 	•		•	ongoing
<ul style="list-style-type: none"> • Clipper Executive Board Meeting 	•		•	Feb 24

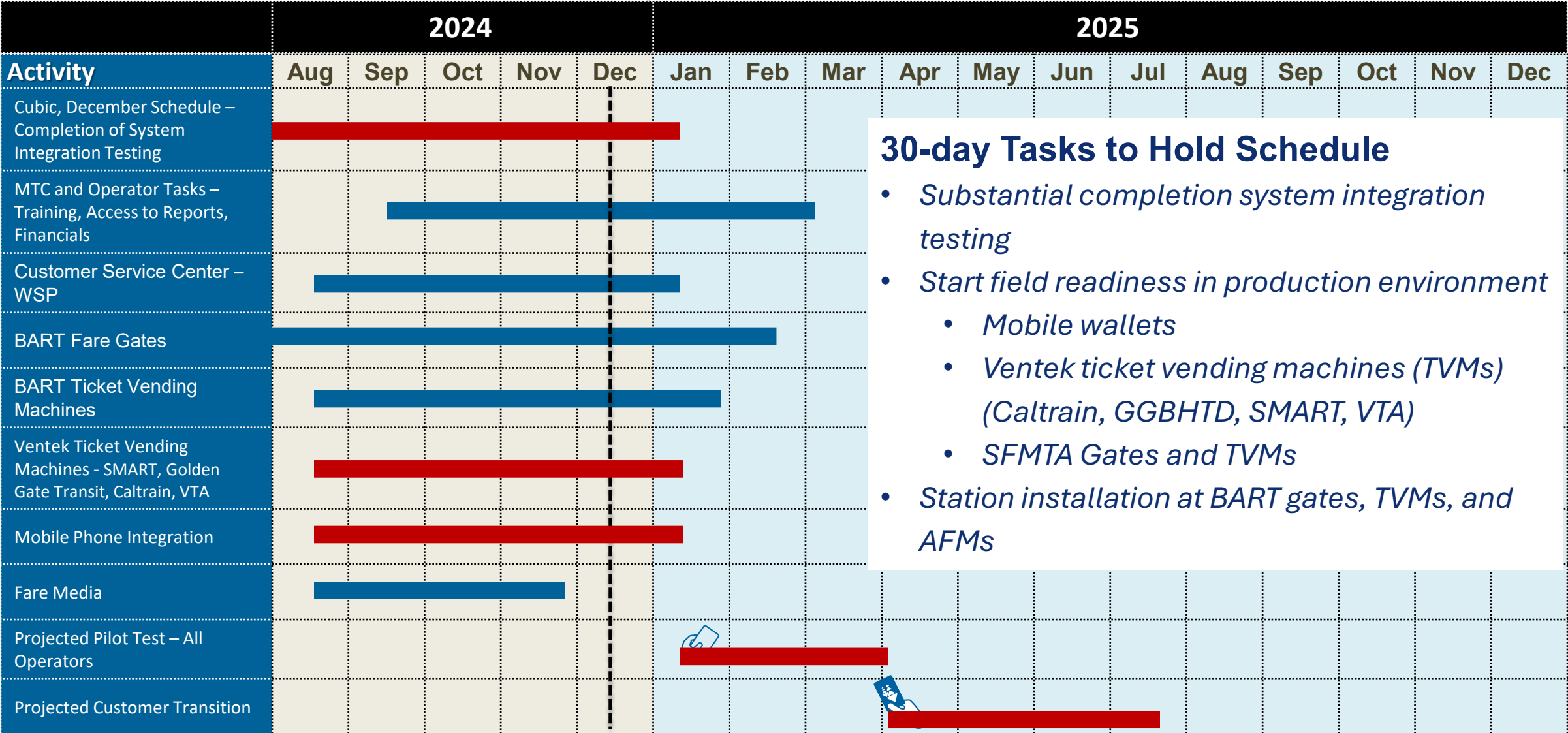


Clipper® Next Generation Schedule

Clipper Executive Board
January 27, 2025

Next Generation Clipper Program Schedule

• As reported at December CEB - Focus on next 30 days

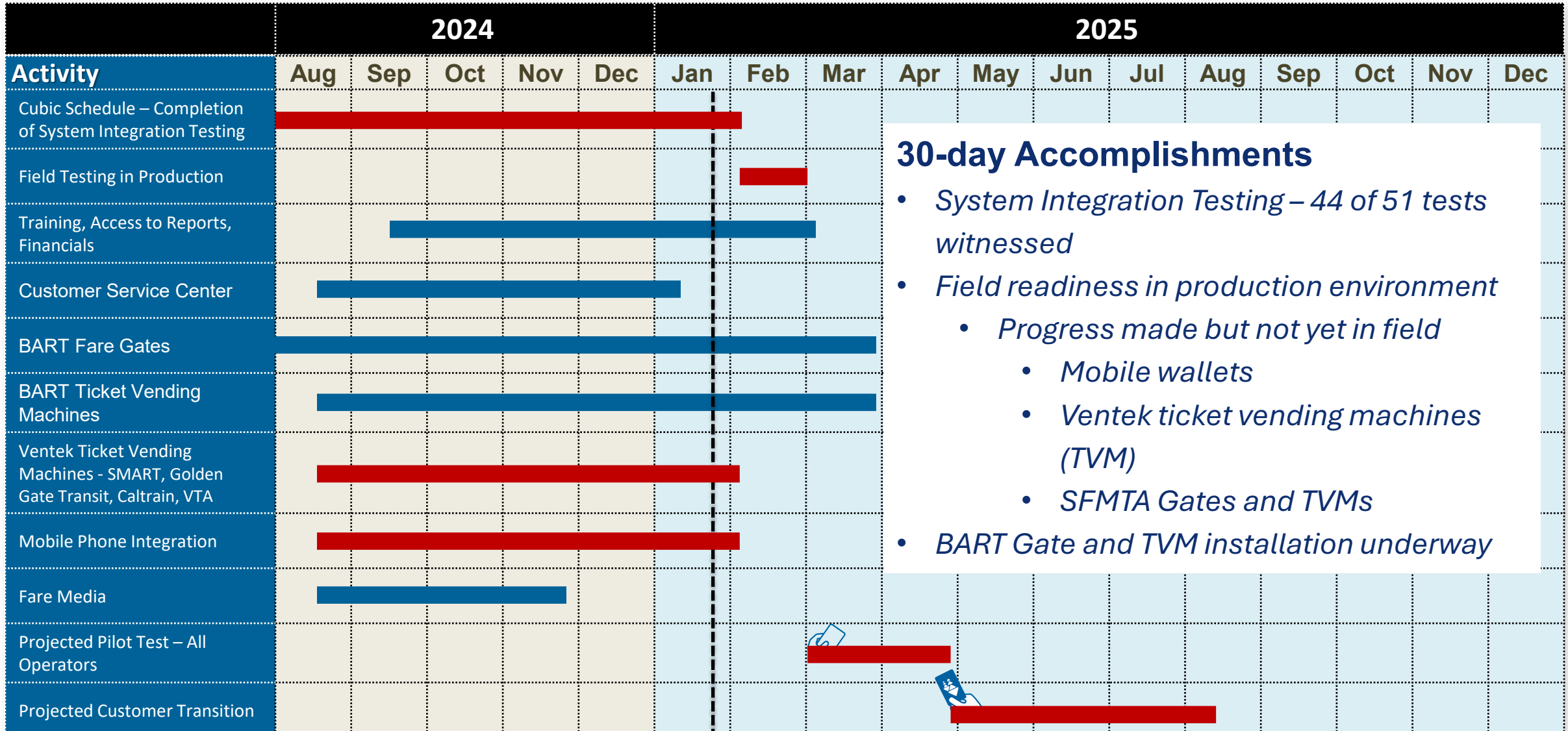


30-day Tasks to Hold Schedule

- Substantial completion system integration testing
- Start field readiness in production environment
 - Mobile wallets
 - Ventek ticket vending machines (TVMs) (Caltrain, GGBHTD, SMART, VTA)
 - SFMTA Gates and TVMs
- Station installation at BART gates, TVMs, and AFMs

Next Generation Clipper Program Schedule

- **Accomplishments since December CEB**



30-day Accomplishments

- *System Integration Testing – 44 of 51 tests witnessed*
- *Field readiness in production environment*
 - *Progress made but not yet in field*
 - *Mobile wallets*
 - *Ventek ticket vending machines (TVM)*
 - *SFMTA Gates and TVMs*
- *BART Gate and TVM installation underway*

System Integration Testing Detail

- Witnessing completed for 44 of 51 test modules as of today

Completed

- Maintenance Management Portal
- Validators & Operator Control Unit
- SFMTA & BART Faregates
- BART TVMs & AFMs
- Discount Management Portal
- CRM
- Reports
- Payments
- 22 individual transit agencies

Scheduled over next 3 weeks

- SFMTA TVM
- Additional Fare Rules
- Promotions Portal
- Institutional & Benefits Portal
- Financial Management
- IVR & Chat support for Call Center
- 3rd Party APIs

- Plan for remaining 7 modules
 - 4 modules to be complete by end of January
 - Final 3 modules (SFMTA TVM, 3rd Party APIs & Institutional Portal) in early February

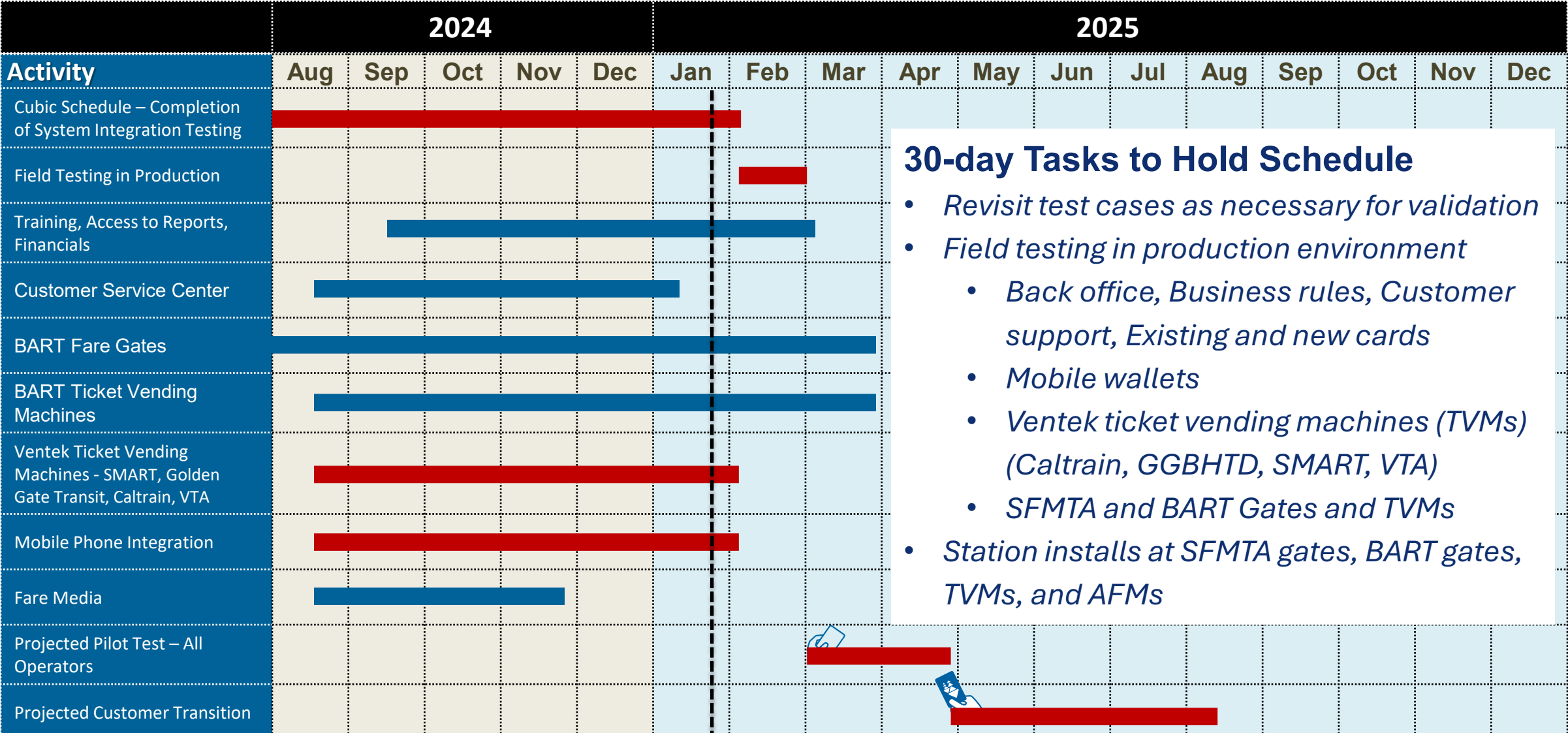


Pilot Preparation

- Several system updates have been made through the month of January to enable account-based and open payment taps, 20 of 23 agencies now support next generation Clipper and contactless payment.
- Updates will continue through February as field testing progresses and the formal pilot gets underway
- BART TVMs have also begun rolling out now that the software has been accepted, and the pilot installation is expanding to several more devices before proceeding with systemwide installations
- SFMTA faregate TR4 installations are also progressing and should be complete in 6-8 weeks

Next Generation Clipper Program Schedule

- Focus on next 30 days

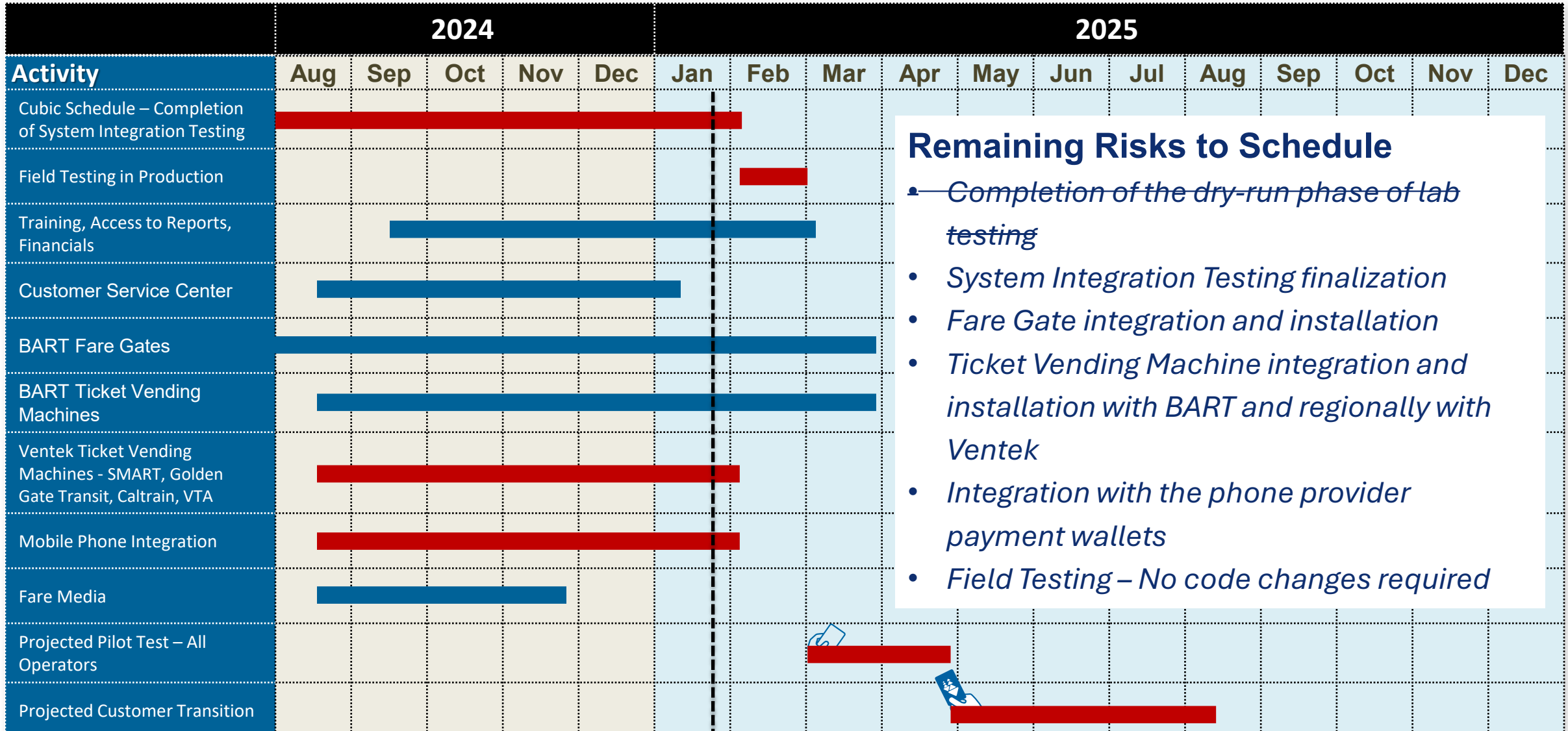


30-day Tasks to Hold Schedule

- Revisit test cases as necessary for validation
- Field testing in production environment
 - Back office, Business rules, Customer support, Existing and new cards
 - Mobile wallets
 - Ventek ticket vending machines (TVMs) (Caltrain, GGBHTD, SMART, VTA)
 - SFMTA and BART Gates and TVMs
- Station installs at SFMTA gates, BART gates, TVMs, and AFMs

Next Generation Clipper Program Schedule

- Focus on Risks



Remaining Risks to Schedule

- ~~Completion of the dry-run phase of lab testing~~
- System Integration Testing finalization
- Fare Gate integration and installation
- Ticket Vending Machine integration and installation with BART and regionally with Ventek
- Integration with the phone provider payment wallets
- Field Testing – No code changes required



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0087 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 12/19/2024 **In control:** Clipper Executive Board

On agenda: 1/27/2025 **Final action:**

Title: Next Generation Clipper® Transition Plan and Overview
Update on plan to transition current Clipper cardholders to the Next Generation account-based system, including a request for Board comments and guidance.

Sponsors:

Indexes:

Code sections:

Attachments: [3b 25-0087 1 Clipper Transition Update](#)
[3b 25-0087 2 C1 Transition Summary](#)

Date	Ver.	Action By	Action	Result
------	------	-----------	--------	--------

Subject:

Next Generation Clipper® Transition Plan and Overview

Update on plan to transition current Clipper cardholders to the Next Generation account-based system, including a request for Board comments and guidance.

Presenter:

Edward Meng, MTC

Recommended Action:

Information

Attachments:

Clipper[®] Executive Board

January 27, 2025

Agenda Item 3b

Next Generation Clipper[®] Transition Plan and Overview

Subject:

Update on plan to transition current Clipper cardholders to the Next Generation account-based system, including a request for Board comments and guidance.

Background:

Account-Based Functionality at Start of Customer Transition

At the December 16, 2024 Clipper Executive Board meeting, Clipper staff presented a summary of account-based features that will be available at the Start of Customer Transition. During the presentation of the slides in Attachment A this month, Clipper staff is again prepared to summarize those features and functionality.

Transition Overview

During Customer Transition, all Clipper accounts, cards, value, passes, and products will migrate (“flip”) from the card-based system to the Account-based C2 Back Office. At that point, Clipper staff expect all legacy equipment will be replaced with their Next Generation Account-based equivalents (excluding Customer Service Terminals), and new websites and portals for MTC, transit agency staff, and other third parties, including institutions and third-party benefit administrators, will be live (e.g.; Discount Program Management, Institutional and Transit Benefit Program Management, and Maintenance Management Portals). As a reminder, the original overriding next-generation Clipper goal was to provide as seamless of a transition as was possible for the current frequent Clipper user. The Transition Plan is intended to show how that goal will be achieved, and to prepare the region to transition both **technically** and **operationally** for full-scale Account-based operations.

Once Customer Transition starts, Clipper staff will begin the process of migrating accounts from the C1 card-based back office to the new C2 Account-based back office and “flipping” cards (i.e. the process by which a customer’s current card-based media is converted to an account-based

fare media, and corresponding card-based value, products, ride history, etc., are converted to account-based value, products, history, etc.). There are two ways in which a customer's C1 media will be "flipped" to C2.

1. Customer-Initiated Transition

The first way is through entirely customer-initiated means. At the Start of Customer Transition, all cards associated with a customer's C1 account will be flipped if a customer:

- Logs into the new C2 Account-based website;
- Logs into the new C2 Account-based mobile app; or
- Calls the new C2 customer service center.

Once a customer initiates these actions after the Start of Customer Transition, their Clipper card serial number (CSN) (as well as all other CSNs associated with their account) will be placed on a list. A customer would then need to tap on a C2 device.

Once a card has been flipped, two years' worth of transaction data will automatically be migrated from the C1 back office to the C2 account. There are some unique edge-case scenarios in which a customer's information or data may not initially be fully transitioned over and we are working with Cubic and our customer service center contractor, WSP, to minimize potential customer confusion or concerns.

2. Card-based to Account-based Back-end System Transition

The second way for customers to be transitioned is through the back-end system, whereby if a customer's profile, ride history, fare category, membership in institution, products, and other such characteristics matches a certain profile, then they are scheduled to be flipped. Initially, the Transition Plan calls for a small number of cards to be listed the first week, with the plan to quickly ramp up to 150,000 additional cards added to the list each day. There are currently approximately 5M active cards in circulation, 1.5M unique cards used in a month, and 4M accounts. Most frequent Clipper card users will likely be flipped to C2 within the first 2-3 weeks. While we are expecting to complete all C1 card flipping in 1.5 to 2 months, however, we have allocated 3 months for this effort in our schedule.

Clipper Card "Flip" Transition Prioritization

Clipper and transit operator staff have discussed the priority in which to transition current Clipper cardholders and potential impacts to customer experience, customer outreach, institutional partners, and transit benefit providers, as well as seeking agency requests and feedback.

During December's Clipper Executive Board meeting, Clipper staff indicated that current Discount Categories populations (Youth, Senior, RTC/Clipper Access, START means-based) would be a priority due to the relative size of their populations, equity concerns, and the addition of the new regional inter-operator transfer rules that would likely result in lower costs for these populations.

Clipper staff also indicated that cards associated with Institutional Programs and Third Party Services would also be a priority, as these populations also rely on other third parties to accurately and correctly receive their orders, and these third parties will likely need training and use new tools, like the Institutional and Transit Benefit Portal that, if not used properly, may cause disruption in cardholder populations. Having this population be a priority will also lessen the administrative burden by minimizing the amount of time the institutions are required to use both portals to manage their programs during transition. Cards associated with Institutional and Transit Benefits are also the most likely to tap and use Clipper regularly, so are strong candidates to be "flipped" (i.e. conversion of C1 cards to C2 account-based cards) to minimize potential disruptions to customers.

For Adult populations, Clipper staff has considered which further breakdowns are needed to determine sub-populations for potential transition. Because Marin Transit riders and agency staff will have the largest change (i.e., "ungrouping" from Golden Gate Transit, switching from dual tap to single tap, availability of passes and products previously not on Clipper), and the relative size of the rider populations in Marin and Sonoma Counties, Clipper staff proposes that the agencies in Marin and Sonoma Counties would be the next priority population. Furthermore, Clipper staff have also noted that the addition of the new regional inter-operator transfer discount will likely result in significant savings (~\$5.50) to transit riders, especially those who regularly ride agencies who don't offer transfer discounts (BART, Caltrain, SF Bay Ferry), Clipper staff proposes that these three agency's riders, and in particular those who riders whose history includes riding multiple operators, be prioritized.

Clipper staff then proposes that customers who have a history of riding multiple agencies then be prioritized by size of population. Clipper staff is prepared to discuss the proposed order of priority of cards for transition with the Board, and are requesting Board comments, questions, feedback, or recommendations.

Issues:

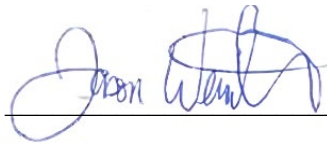
None

Recommendations:

Information

Attachments:

- Attachment A: C2 Transition Overview



Jason Weinstein



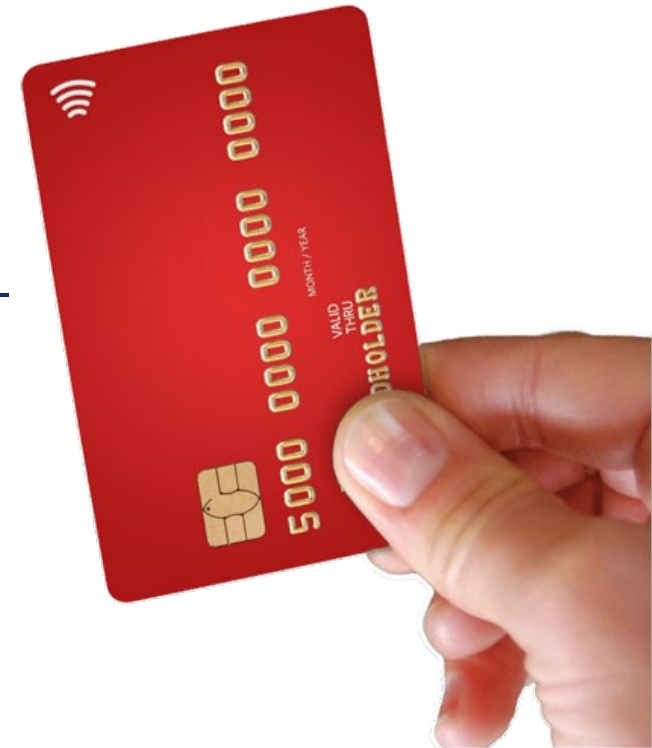
C2 Transition Overview

Clipper Executive Board Meeting

January 27, 2025

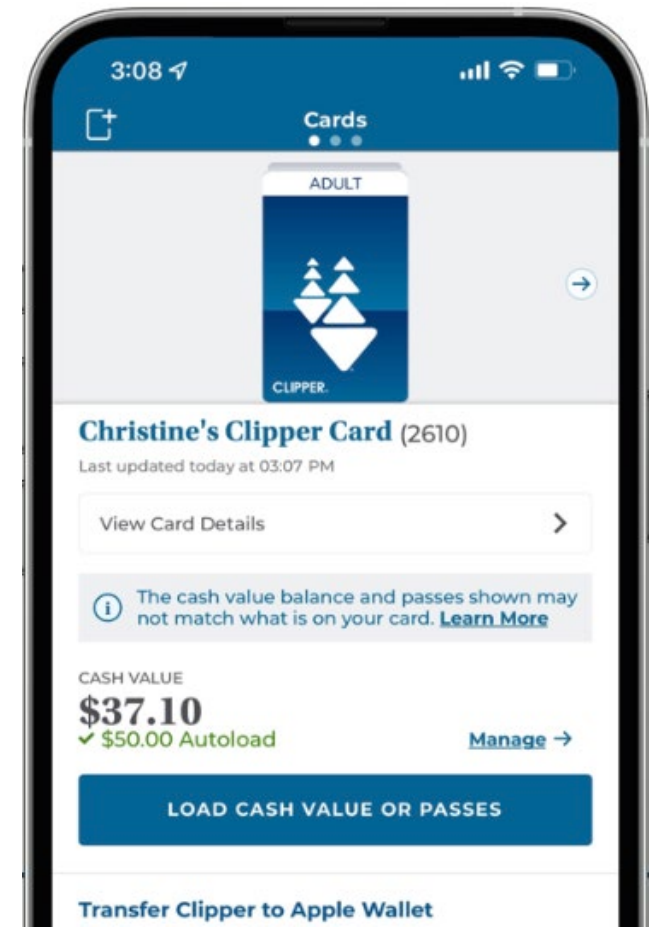
What's New at Start of Customer Transition

- Open Payment acceptance
 - Visa, Mastercard, American Express, Discover, Apple Pay, Google Pay
- New Tapping Procedures
 - No balance on reader, Marin Transit and dual-tap operators (excl. BART)
- Account-Based Features
 - Regional inter-operator transit discount
 - Accumulators
 - New passes and products
 - Real time loads



Card-based to Account-based Card Transition

- Process by which a customer's C1 card-based media is converted to an account-based media ("flipping") and corresponding value, products, ride and transaction history are migrated to the account-based C2 back office
- Customer Initiated
 - Log into C2 account-based website
 - Log into C2 account-based mobile app
 - Call the C2 customer service center
- Back Office Transition
 - List regionally prioritized based on card and customer profile
 - Once on list, card will flip when tapped



Transition Prioritization | Goals and Considerations

- Customer equity
- Operational impacts
 - Transit Operator staff
 - Institutions
 - Transit Benefit Providers
 - Customer Service Representatives
- Mitigate differences in customer experiences by capturing as many customers as possible within first month
- Target riders who will likely benefit most from new C2 features
 - New regional inter-operator transfer discounts
 - New product availability



Transition Priority Proposal – Discount and Institutions/TPBs

- Youth, Senior, RTC Clipper Access, START means-based

Discount Category	Cards – Total (approx.)	Cards – Active 6 Months	Cards – Active 12 Months
Youth	185,000	75,000	90,000
Senior	640,000	215,000	260,000
RTC / Clipper Access	150,000	25,000	30,000
START Means-Based	30,000	25,000	27,000

- Institutions and Transit Benefit Providers
 - Third parties require training on new C2 tools, portals, and sites
 - Lessens administrative burden of two different processes to manage programs
 - Customers who receive benefits most likely to use Clipper and tap regularly
 - Caltrain Monthly Passholders

Transition Priority Proposal – Adult Population

Group	Size (Estimated)
Marin Transit, Golden Gate Transit, Golden Gate Ferry, SMART, Sonoma County, Santa Rosa City Bus, Petaluma Transit + Others	250,000
BART + Others (Registered Only)	600,000
Caltrain + Others	300,000
WETA + Others	130,000
Muni + Others (Registered Only)	500,000
AC Transit + Others	500,000
VTA + Others	180,000

Group	Size (Estimated)
SamTrans + Others	175,000
County Connection, Wheels, LAVTA, WestCAT, Union City + Others	100,000
NVTA, Soltrans, FAST, Vacaville CityCoach + Others	20,000
BART + Others (Unregistered Only)	600,000
Muni + Others (Unregistered Only)	700,000
All “Single Operator” riders	Descending population size

Transition Timeline – Reference

Transition Pilot

- Clipper users: Limited number of C2/C1+ media testing the system publicly, majority still C1
- C1 media: current system, settling to C1
- C2/C1+ media: account-based features, new biz rules, new products, ungrouped (single) operators, fare capping features, new transfer rules, settling to C2
- Open Payment media: Limited
- Operators: Majority of customers still C1, operations mainly C1 but partially C2, dual financial reports needed

Customer Transition

- Clipper users: C1 card numbers sent to system devices publicly to be converted to C1+
- C1 media: batches of cards to be flipped to C1+, order and priority TBD via Transition Plan work
- C2/C1+ media: account-based features, new biz rules, new products, ungrouped (single) operators, fare capping features, new transfer rules
- Open Payment media: available, Adult fares, standard inter and intra-operator transfers, fare capping features
- Operators: Majority of customers become C2, operations mainly C2 but partially C1, dual financial reports needed

Transition End

3 months post
Customer Transition

- Clipper users: Majority of active users C2 or flipped to C1+
- C1 media: TBD (C1 cards have not interacted with account-based back office to be flipped)
- C2/C1+ media: account-based features, new biz rules, new products, ungrouped (single) operators, fare capping features, new transfer rules
- Open Payment media: available, Adult fares, standard inter and intra-operator transfers, fare capping features
- Operators: Large majority of customers and operations C2, C1 system can likely be shut down when determined appropriate