



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

Meeting Agenda

Clipper Executive Board

Robert Powers, Chair

April Chan, Vice Chair

Monday, April 28, 2025

1:00 PM

BART

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

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 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/89264528659>

iPhone One-Tap: US: +16699006833,,89264528659# US (San Jose)
+16694449171,,89264528659# US

Join by Telephone (for higher quality, dial a number based on your current location) US:
888 475 4499 (Toll Free) or 877 853 5247 (Toll Free)

Webinar ID: 892 6452 8659

International numbers available: <https://us06web.zoom.us/j/89264528659>

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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 business 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****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.** [25-0557](#) Minutes of the February 24, 2025 Meeting
- Action:** Approval
- Attachments:** [2a 25-0557 Minutes CEB Meeting 2025 02 24](#)
- 2b.** [25-0558](#) Current Clipper® Operations and Performance Update
- Update on current Clipper System Operations and Performance
- Action:** Information
- Presenter:** Akash Ghosal, MTC
- Attachments:** [2b 25-0558 Current Clipper Operations and Performance Update](#)
- 2c.** [25-0593](#) Sunsetting of the Fare Integration Task Force, a Special Committee of the Clipper Executive Board.
- Request for Board approval to sunset the Fare Integration Task Force, a special committee of the Clipper Executive Board.
- Action:** Approval
- Presenter:** William Bacon, MTC
- Attachments:** [2c 25-0593 1 FITF Sunsetting summary sheet](#)

3. Information / Approval

- 3a.** [25-0559](#) 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 25-0559 1 Clipper Schedule and Implementation Update](#)
[3a 25-0559 2 CEB Status Report 2025-04-28 Att B](#)
[3a 25-0559 3 Clipper Schedule Attachment B](#)

3b. [25-0560](#) Draft Clipper® Two Year Budget

The Clipper budget and work plan for Fiscal Years (FYs) 2025-26 and 2026-27 for the Executive Board's review and discussion.

Action: Information

Presenter: Edward Meng, MTC

Attachments: [3b_25-0560_1_Clipper_Two_Year_Budget](#)
[3b_25-0560_2_Operating_Revenue_and_Budget](#)
[3b_25-0560_3_Capital_Revenue_and_Budget](#)

3c. [25-0594](#) RTC Clipper Access Rebrand Marketing Update

An update on the marketing plan for the public rebranding of Regional Transit Connection (RTC) to the program's new name Clipper Access at the launch of the Next Generation Clipper System (C2).

Action: Information

Presenter: Lydia Elias, MTC

Attachments: [3c_25-0594_1_RTC_Clipper_Access_Rebrand_Marketing_Update](#)
[3c_25-0594_2_Sample_Design_of_the_Clipper_Access_Card](#)

4. Director's Report – Jason 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 May 19, 2025, 1:00 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.

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 #: 25-0557 **Version:** 1 **Name:**
Type: Minutes **Status:** Consent
File created: 3/27/2025 **In control:** Clipper Executive Board
On agenda: 4/28/2025 **Final action:**
Title: Minutes of the February 24,2025 Meeting
Sponsors:
Indexes:
Code sections:
Attachments: [2a_25-0557_Minutes_CEB_Meeting_2025_02_24](#)

Date	Ver.	Action By	Action	Result
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Subject:
Minutes of the February 24,2025 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, February 24, 2025

1:00 PM

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

Roster

Robert Powers, Chair; April Chan, Vice Chair

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

Present: 9 - Chair Powers, Vice Chair Chan, Board Member Cumins, Board Member Fremier, Board Member Gonot, Board Member Kelly, Board Member Kirschbaum, Board Member Mulligan, and Board Member Wegener

2. Consent Calendar

Vice Chair Chan arrived after the approval of the Consent Calendar.

Upon the motion by Board Member Wegener and seconded by Board Member Cumins, the Clipper Executive Board Consent Calendar was approved. The motion carried by the following vote:

Aye: 8 - Chair Powers, Board Member Cumins, Board Member Fremier, Board Member Gonot, Board Member Kelly, Board Member Kirschbaum, Board Member Mulligan and Board Member Wegener

Absent: 1 - Vice Chair Chan

2a. [25-0077](#) Minutes of the January 27, 2025 Meeting

Action: Approval

Attachments: [2a 20250127 Clipper Executive Board Meeting Minutes DRAFT.pdf](#)

- 2b.** [25-0305](#) Current Clipper® Operations and Performance Update
- Update on current Clipper System Operations and Performance
- Action:** Information
- Presenter:** Edward Meng
- Attachments:** [2b_25-0305_Current_Clipper_Operations_and_Performance_Update_v1.pdf](#)

3. Information

- 3a.** [25-0084](#) 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_1_Clipper_Schedule_and_Implementation_Update_v1_2025-02-24_v4.pdf](#)
[3a_2_CEB_Status_Report_2025-02-24_v4.pdf](#)
[3a_3_Clipper_Schedule_Attachment_v4.pdf](#)
- The following individuals spoke on this item: Aleta Dupree (Team Folds), Adina Levin (Seamless Bay Area), and Roland Wong (MTC Policy Advisory Council).
- 3b.** [25-0085](#) 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
- Attachments:** [3b_Clipper_Transition_Update_v1.pdf](#)
[3bi_C1_Transition_Summary_v1.pdf](#)

3c. [25-0309](#) Update on Next Generation Clipper Communications

Description of messaging and other strategies for communicating to the public about the Next Generation Clipper System

Action: Information

Presenter: Lysa Hale

Attachments: [3c_25-0309_CEB Next Generation Clipper Communications Plan_v1.pdf](#)
[3ci_CEB_Next Gen Clipper Communication Plan_022425_v2.pdf](#)

The following individuals spoke on this item: Anthony (Transbay Coalition), and Adina Levin (Seamless Bay Area).

4. Approval**4a.** [25-0307](#) Request for Approval to Distribute Events Pass for Annual APTA Conference

BART and SFMTA proposal to distribute Clipper cards loaded with the six-day Events Pass to approximately 2,000 attendees of the Annual APTA Conference in June 2025.

Action: Approval

Presenter: Patricia Nelson, BART, Diana Hammons, SFMTA

Attachments: [4a_Request for Approval to Distribute Events Pass for APTA_v3.pdf](#)
[4ai_October 2015 APTA Clipper Events Pass Usage_v1.pdf](#)

Adina Levin, Seamless Bay Area, spoke on this item.

Upon the motion by Board Member Kelly and seconded by Board Member Cumins, the request to distribute Event Passes for the annual APTA Conference was approved. The motion carried by the following vote:

Aye: 9 - Chair Powers, Vice Chair Chan, Board Member Cumins, Board Member Fremier, Board Member Gonot, Board Member Kelly, Board Member Kirschbaum, Board Member Mulligan and Board Member Wegener

4b. [25-0308](#) Clipper Purchase Order - Production of Clipper Cards: Paragon ID High Point US (\$1,000,000)

Request for approval of a sole source Purchase Order with Paragon ID High Point US (Paragon) for procurement of Clipper cards in a not to exceed amount of \$1,000,000.

Action: Approval

Presenter: Jennifer Largaespada

Attachments: [4b — Purchase Order with Sole Source with Paragon_v2.pdf](#)

Upon the motion by Board Member Mulligan and seconded by Board Member Kelly, the request for approval of a sole source Purchase Order with Paragon ID High Point US (Paragon) for procurement of Clipper cards in a not to exceed amount of \$1,000,000 was approved. The motion carried by the following vote:

Aye: 9 - Chair Powers, Vice Chair Chan, Board Member Cumins, Board Member Fremier, Board Member Gonot, Board Member Kelly, Board Member Kirschbaum, Board Member Mulligan and Board Member Wegener

5. Director’s Report – Jason Weinstein

Adina Levin, Seamless Bay Area, spoke on this item.

6. Public Comment / Other Business

Aleta Dupree, Team Folds, spoke on this item.

7. Adjournment / Next Meeting



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0558 **Version:** 1 **Name:**
Type: Report **Status:** Consent
File created: 3/27/2025 **In control:** Clipper Executive Board
On agenda: 4/28/2025 **Final action:**
Title: Current Clipper® Operations and Performance Update
Update on current Clipper System Operations and Performance

Sponsors:

Indexes:

Code sections:

Attachments: [2b 25-0558 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

April 28, 2025

Agenda Item 2b

Current Clipper® Operations and Performance Update

Subject:

Update on current Clipper System operations and performance

Background:

Transaction and Sales

In March 2025, Clipper processed over 14.4 million transactions and settled over \$35 million in revenue, an increase of 10.2% and 13.4%, respectively, compared to March 2024.

Clipper Mobile Card Adoption and Usage

Since the launch of the mobile Clipper card in April 2021, over 3.8 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 March 2025 alone, 37.5% of Clipper trips were taken using a mobile card, compared to 31.5% in March 2024.

Clipper START Card Issuance and Usage

In March 2025, the Clipper START program approved 1,635 applications, which is 1.4% more than the applications in March 2024. There were 71% more Clipper START trips in March 2025 than in March 2024.

Issues:

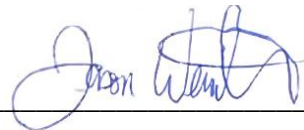
None identified.

Recommendations:

Information.

Attachments:

- None



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0593 **Version:** 1 **Name:**

Type: Action Item **Status:** Committee Approval

File created: 4/4/2025 **In control:** Clipper Executive Board

On agenda: 4/28/2025 **Final action:**

Title: Sunsetting of the Fare Integration Task Force, a Special Committee of the Clipper Executive Board.

Request for Board approval to sunset the Fare Integration Task Force, a special committee of the Clipper Executive Board.

Sponsors:

Indexes:

Code sections:

Attachments: [2c_25-0593_1_FITF_Sunsetting_summary_sheet](#)

Date	Ver.	Action By	Action	Result
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Subject:

Sunsetting of the Fare Integration Task Force, a Special Committee of the Clipper Executive Board.

Request for Board approval to sunset the Fare Integration Task Force, a special committee of the Clipper Executive Board.

Presenter:

William Bacon, MTC

Recommended Action:

Approval

Attachments:

Sunsetting of the Fare Integration Task Force, a Special Committee of the Clipper Executive Board

Subject:

Request for Board approval to sunset the Fare Integration Task Force, a special committee of the Clipper Executive Board.

Background:

The Fare Integration Task Force (FITF) was established in September 2019 by the Clipper Executive Board as a special committee of the Clipper Executive Board to provide project oversight for the Fare Coordination/Integration Study and Business Case (FCIS). The FCIS was concluded in November 2021 when the FITF adopted the Transit Fare Policy Vision Statement. Since that time, the FITF has met on an as needed basis to provide oversight on staff actions to advance the four key recommendations identified in the Transit Fare Policy Vision Statement.

In February 2023, MTC established, via MTC Resolution No. 4564, the Regional Network Management Council (RNM Council) based on recommendations from the regional Blue Ribbon Transit Recovery Task Force and the Network Management Business Case Advisory Group. The RNM Council's work plan and focus is established on an annual basis and includes oversight of the initiatives coming out of the Transit Transformation Action Plan.

While the membership of the Clipper Executive Board, the FITF, and the RNM Council has significant overlap, four of the 13 members of the FITF are not represented on the RNM Council, including two members of the Clipper Executive Board (Eddy Cumins and Christy Wegener). A detailed membership roster for all three bodies can be found in Attachment A to this item.

Given that the original intent of the FITF was to provide oversight for a limited project scope that is now complete (i.e. the FCIS, co-managed by MTC and BART), staff are recommending that the Clipper Executive Board sunset the Fare Integration Task Force as a special committee of the Clipper Executive Board. Due to the similar mission, work, and focus areas, MTC staff would then bring matters that had been considered by the Fare Integration Task Force, including oversight of Transit Fare Policy Vision Statement implementation and the Clipper START Pilot Program, to the Regional Network Management Council for consideration.

Staff at the region's transit agencies and MTC would like to express gratitude for all members of the Fare Integration Task Force, past and present, for their support and guidance of the regional fare coordination and integration initiatives. The composition of the Clipper Executive Board and the RNM Council will remain unaltered with this proposed action.

Issues:

None identified.

Recommendation:

Staff recommends that the Clipper Executive Board approve the sunseting of the Fare Integration Task Force, a special committee of the Clipper Executive Board.

Attachments:

Attachment A Membership Rosters



Jason Weinstein

Attachment A
 Membership Rosters
 (as of April 2025)

RNM Council	Fare Integration Task Force	Clipper Executive Board
Bob Powers, Chair	Bob Powers	Bob Powers, Chair
April Chan, Vice Chair	April Chan	April Chan, Vice Chair
Andy Fremier	Andy Fremier	Andy Fremier
Carolyn Gonot	Carolyn Gonot	Carolyn Gonot
Kathleen Kelly (interim)	Kathleen Kelly (interim)	Kathleen Kelly (interim)
Denis Mulligan	Denis Mulligan, Vice Chair	Denis Mulligan
Julie Kirschbaum	Julie Kirschbaum	Julie Kirschbaum
Bill Churchill	Bill Churchill	Eddy Cumins
Michelle Bouchard	Michelle Bouchard	Christy Wegener
Nancy Whelan	Daryl Halls	
Seamus Murphy	Eddy Cumins	
	Kate Miller	
	Christy Wegener	



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0559 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 3/27/2025 **In control:** Clipper Executive Board

On agenda: 4/28/2025 **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 25-0559 1 Clipper Schedule and Implementation Update](#)
[3a 25-0559 2 CEB Status Report 2025-04-28 Att B](#)
[3a 25-0559 3 Clipper Schedule Attachment B](#)

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 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

April 28, 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 February 24, we have continued to make significant progress on the tasks identified over the previous several months to maintain the start of customer transition. At the last CEB meeting, we anticipated that the pre-Transition Pilot test would start in March. However, because of delays in completing System Integration Testing and field installations, the decision was made to hold off on opening up the production system to public testers and instead to increase field testing with internal resources to verify functionality and identify issues needing resolution. Field testing has been ramping up, starting with Clipper MTC and consultant staff, then expanding to include additional MTC and transit operator staff volunteers. We are now starting the public Pre-Transition Pilot with volunteers from transit operator staff, MTC's Policy Advisory Council and Customer Advisory Group, and transit operators' citizen advisory boards. This achievement is an important milestone and allows us to identify and fix issues prior to starting customer transition. There is a plan to increase the public participation in the Pilot as results show positive direction.

Our current projected schedule continues the public pre-transition Pilot through June so that we can be confident that we are responsibly starting customer transition with as little disruption as possible to transit riders. This places the estimated date for the start of Customer Transition in late July. However, as reported each month, until the risks have been eliminated, these risks still have the potential to push the start of customer transition.

There has been significant progress over the past two months, and the Clipper contractors along with Clipper and operator staff are all working collaboratively to complete the tasks to advance the program. We have completed all test witnessing sessions, and Cubic is working on updates to allow completion of remaining test cases, re-testing of fixes, and results submittals, to close out formal System Integration Testing. We are nearly complete with installation work at SFMTA, have made significant progress on the VenTek ticket vending machine operators, and BART has installed Clipper hardware in the gates at most stations. We have also made significant progress with testing in the field and have identified and resolved several issues, and we are getting closer to eliminating the risks to the schedule.

The schedule critical path continues to run through system integration testing, field testing, mobile wallet integration, and VenTek ticket vending machine deployment. We have added Training as a new risk to the schedule, as much of the system has only become recently available for training operator staff. Our marketing plan calls for extensive public outreach to begin 30 days prior to the start of customer transition.

Below is an update to the reported items that needed to be accomplished in the 30 days following the last CEB meeting on February 24 to preserve the schedule:

- Fix issues identified in System Integration Testing (SIT)
 - Update: SIT witnessing sessions have been completed, and Cubic is addressing the remaining test cases and documenting the results of re-tests.
- Perform field testing in production environment
 - Back office, Business rules, Customer support, Existing and new cards
 - Update: Testing underway
 - Mobile wallets
 - Update: Testing underway
 - VenTek ticket vending machines (TVMs) (Caltrain, GGBHTD, SMART, VTA)
 - Update: Testing underway
 - SFMTA and BART Gates and TVMs

- Updates:
 - SFMTA gates are nearly complete
 - BART has installed readers in gates at a majority of stations
 - BART and Cubic are still working on some TVM issues

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

- Expanding the public pre-transition Pilot.
 - Continued work to find and fix configuration issues
- Complete updates to VenTek ticket vending machines (TVMs) (Caltrain, GGBHTD, SMART, VTA)
- Continue testing of Mobile Wallets in the field
- Continue production software updates

Staff will continue to monitor and assist with expediting ongoing activities in advance of Customer Transition. We will report back to this Board in May on the progress toward the start of customer transition.

C2 Schedule Risks

MTC continues to work with Cubic, transit operators, and other partners to address the following risks:

- Fare Gate integration and installation
- BART Ticket Vending Machine integration and installation
- VenTek Ticket Vending Machine integration
- Integration with the phone provider payment wallets
- Field Testing identifies need for code changes
- Training operator staff

C2 Implementation

Included as Attachment A to this memorandum is a summary of recently completed and ongoing 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. Cubic is ramping up delivery of fare inspection devices to operators and preparing for installation of Customer Service Terminals at in-person customer service center locations.

C2 Testing

We have started Pre-Transition Pilot.

Issues:

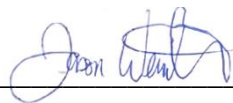
Schedule risks described above

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 – April 28, 2025



Summary

- Pre-Transition System Integration Testing (SIT) witnessing sessions complete; testing of fixes and updates ongoing in lab environment. Field testing of account-based system underway.
- BART fare gate validator, BART ticket vending machine (TVM) validator, and Muni fare gate validator installation continues.
- Fare Inspection device deliveries continue. Installation of Customer Service Terminals underway.
- Cubic continuing revision of Manuals and Training Materials 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 and Ongoing Activities

	MTC/Arcadis	Cubic	Operators	Date
• New Devices:				
○ BART fare gate validator installation (cont'd)	●	●	●	ongoing
○ Muni fare gate validator installation (cont'd)	●	●	●	ongoing
○ Fare inspection device deliveries (cont'd)	●	●	●	ongoing
• System Integration Test Witnessing:				
○ Mobile App/wallet (cont'd)	●	●	●	Feb 26
○ Muni Ticket Vending Machine	●	●	●	Apr 2
• System Testing:				
○ Account-based system field testing (cont'd)	●	●		ongoing

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	●	●	●	ongoing
• System Testing:				
○ Account-based system field testing (cont'd)	●	●	●	ongoing
○ Pilot Test	●	●	●	May–Jun
• Account-based System Documentation:				
○ Manuals & Training Materials resubmittal review (cont'd)	●		●	ongoing
• Clipper Executive Board Meeting	●		●	May 19

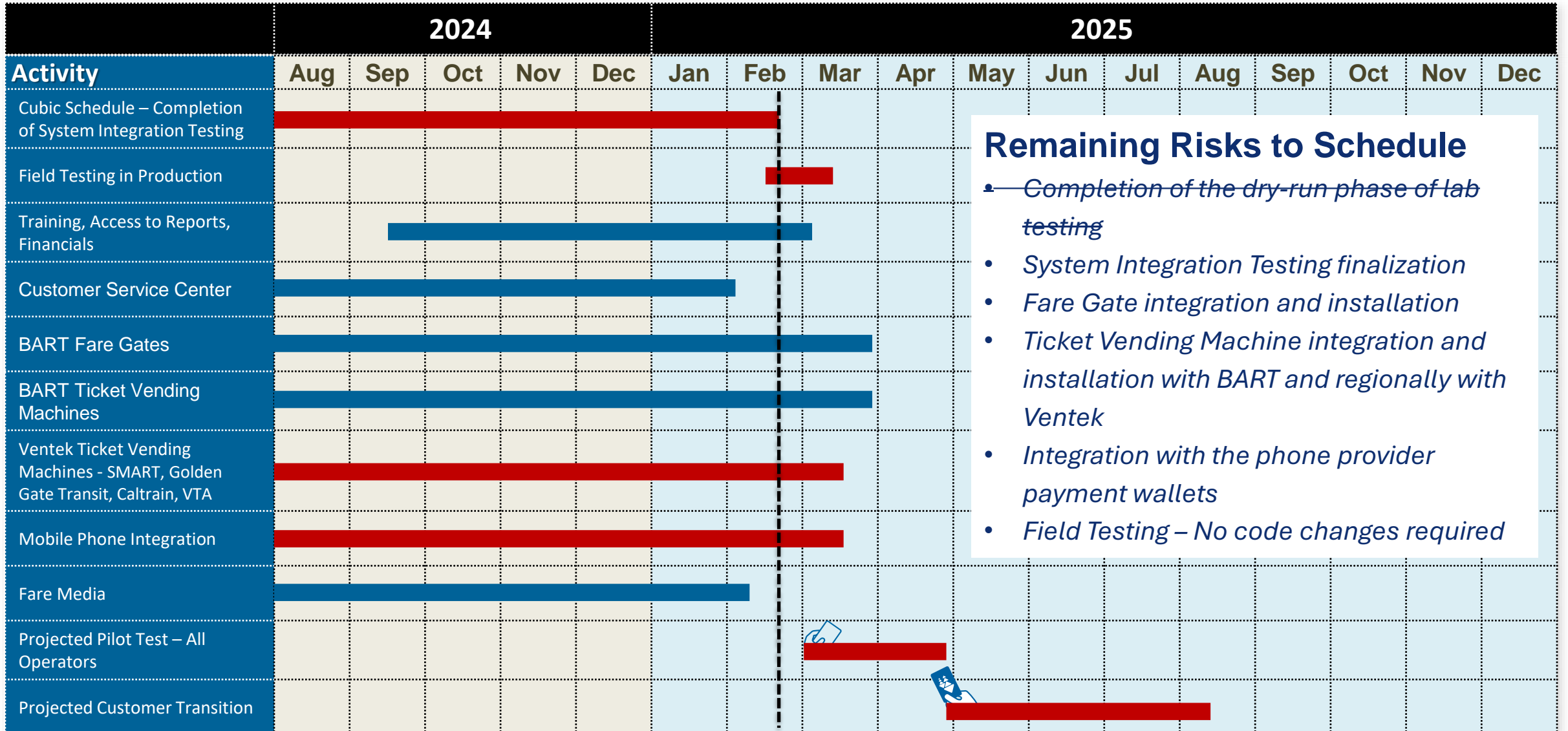


Clipper® Next Generation Schedule

Clipper Executive Board
April 28, 2025

Next Generation Clipper Program Schedule

- Focus on Risks - As reported at February CEB

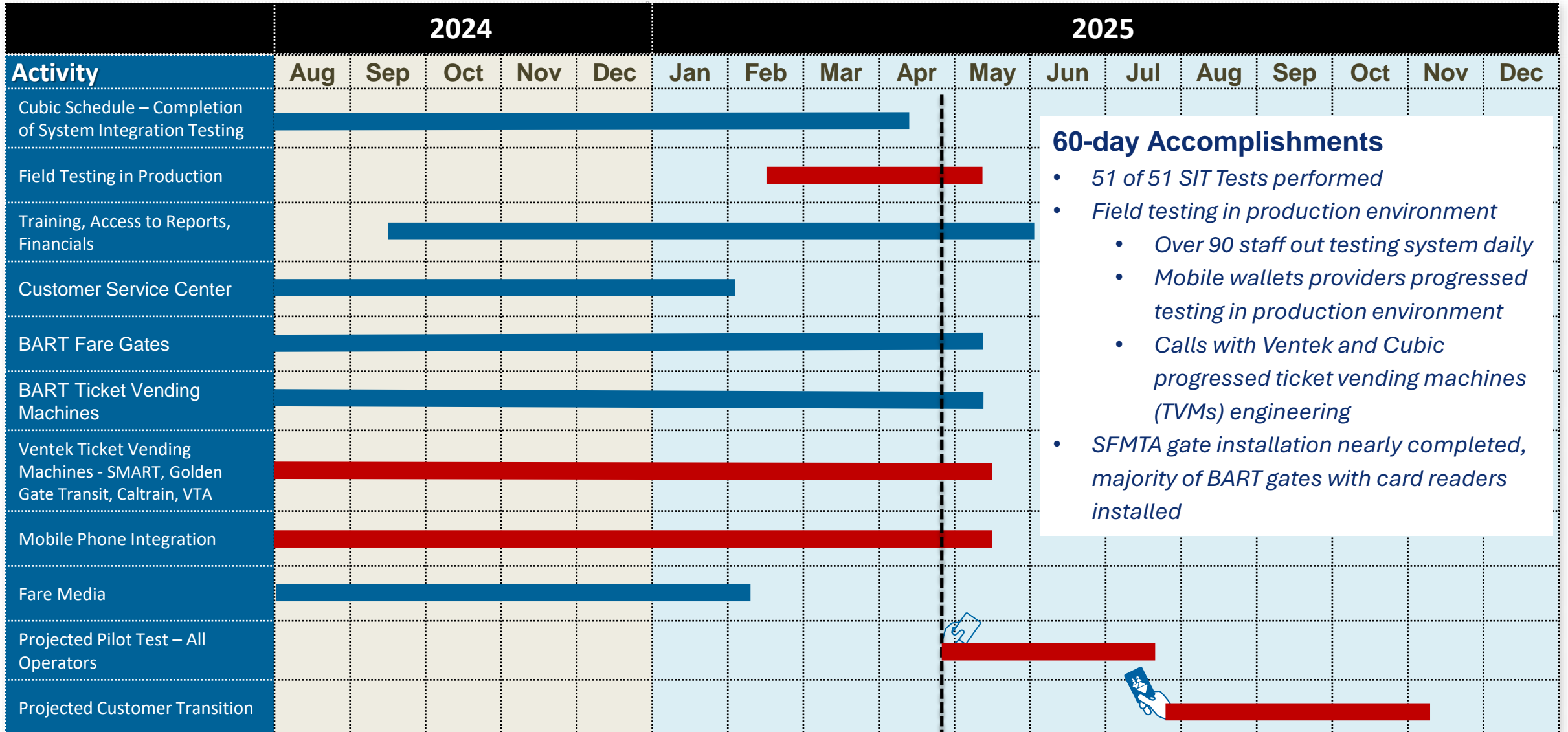


Remaining Risks to Schedule

- ~~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

Next Generation Clipper Program Schedule – Updated as of April 2025

- Accomplishments since February CEB



60-day Accomplishments

- 51 of 51 SIT Tests performed
- Field testing in production environment
 - Over 90 staff out testing system daily
 - Mobile wallets providers progressed testing in production environment
 - Calls with Ventek and Cubic progressed ticket vending machines (TVMs) engineering
- SFMTA gate installation nearly completed, majority of BART gates with card readers installed

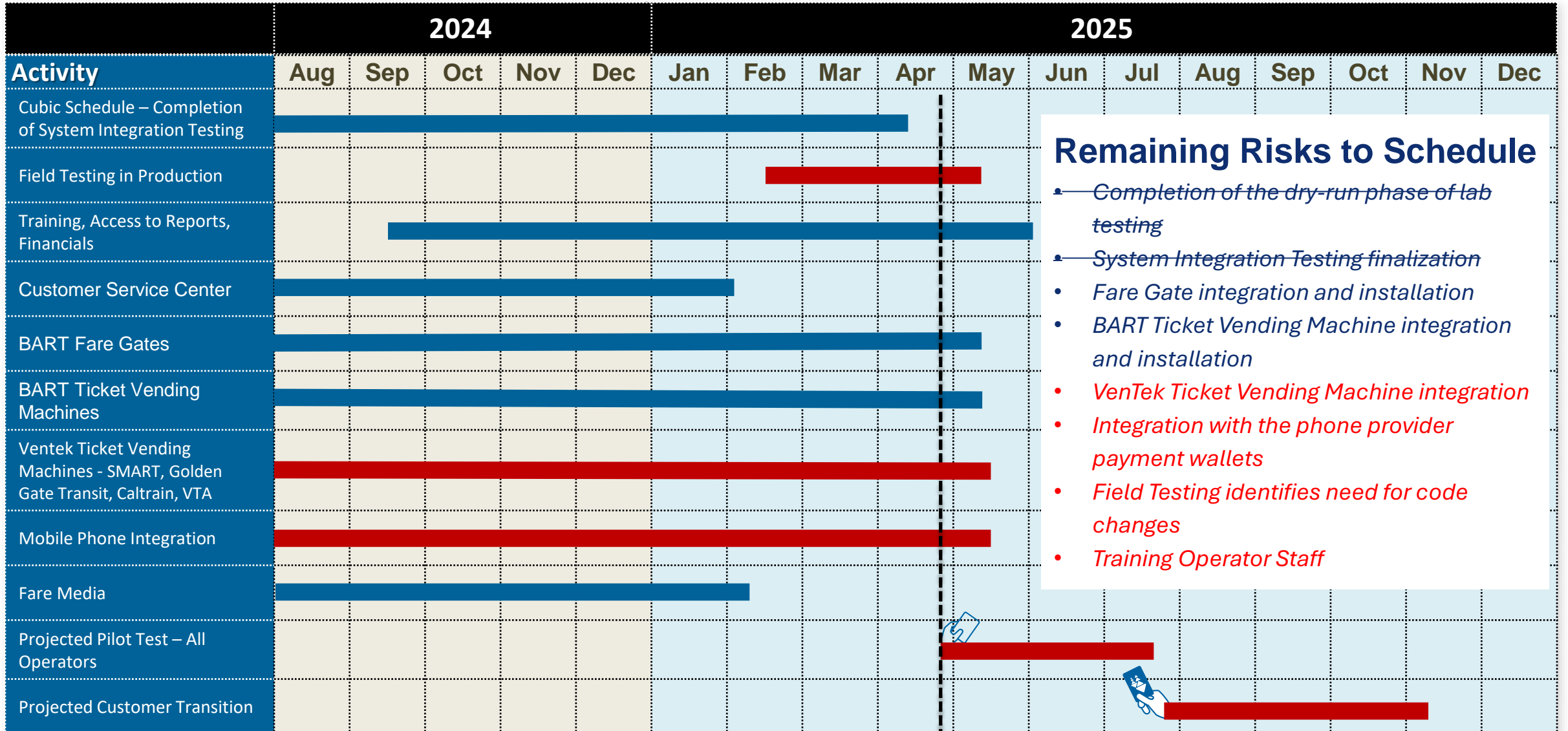


Testing & Pilot Activities

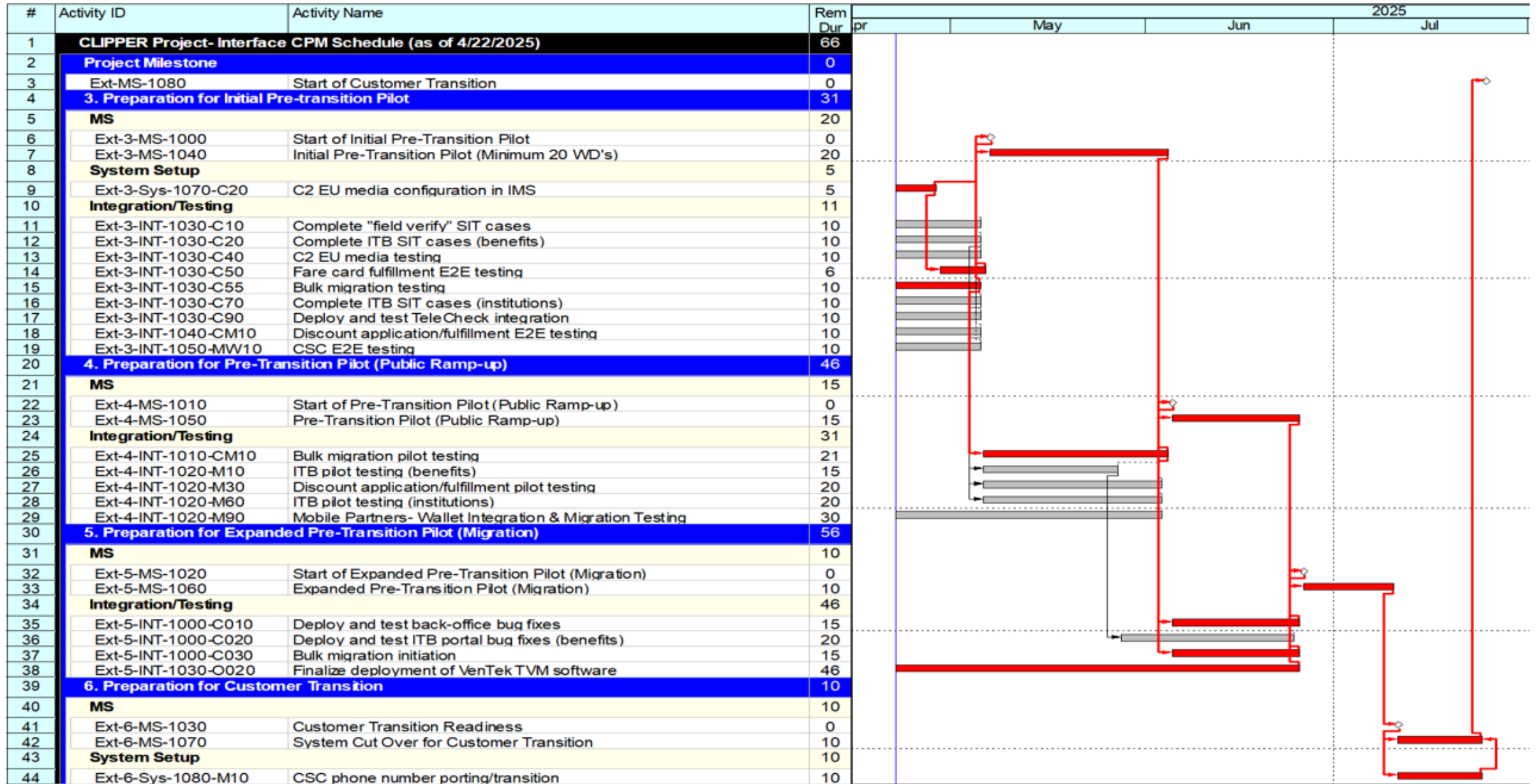
- Test witnessing is now complete, SFMTA ticket vending machine event was last in a series going back of six months, 51 modules, 2,500 test procedures, and 65 individual sessions
- Hundreds of next-generation Clipper readers have been delivered to BART to support the installation of their next-generation faregates, as well as the upgrading of their legacy gates
- Upgrades to SFMTA's faregates with next-generation Clipper readers are nearly complete
- Migration support for Clipper cards in mobile wallets is being tested and deployed for use during the Pilot



Updated Schedule, Remaining Risks & Critical Path



Critical Path with Additional Detail





Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0560 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 3/27/2025 **In control:** Clipper Executive Board

On agenda: 4/28/2025 **Final action:**

Title: Draft Clipper® Two Year Budget

The Clipper budget and work plan for Fiscal Years (FYs) 2025-26 and 2026-27 for the Executive Board's review and discussion.

Sponsors:

Indexes:

Code sections:

Attachments: [3b 25-0560 1 Clipper Two Year Budget](#)
[3b 25-0560 2 Operating Revenue and Budget](#)
[3b 25-0560 3 Capital Revenue and Budget](#)

Date	Ver.	Action By	Action	Result
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Subject:

Draft Clipper® Two Year Budget

The Clipper budget and work plan for Fiscal Years (FYs) 2025-26 and 2026-27 for the Executive Board's review and discussion.

Presenter:

Edward Meng, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

April 28, 2025

Agenda Item 3b

Draft Clipper® Two Year Budget

Subject:

The Clipper budget and work plan for Fiscal Years (FYs) 2025-26 and 2026-27 for the Clipper Executive Board's review and discussion.

Background:

Under the Memorandum of Understanding, the Clipper Executive Board reviews and adopts a biennial Clipper budget. The budget is intended to provide an understanding of the scope and size of major expense categories, proposed funding plan, and overall summary of Clipper program work elements. The budget is updated annually and includes both current Clipper system and next-generation Clipper system costs, as well as costs to operate, maintain, and implement the overall Clipper program, including staffing, customer education and marketing, and estimated costs from other next-generation Clipper procurements.

Attached for your review are the Clipper Draft Operating Budget (Attachment A) and the Clipper Draft Capital Budget (Attachment B) with FYs 2025-26 and 2026-27 bordered in red, along with estimated projections of both the Operating and Capital Budget five years from the current FY to FY 2028-29.

Highlights of the Clipper Draft Two Year **Operating** Budget include:

1. An assumption that full parallel operations of the C1 card-based system and the C2 account-based system must be supported during the entire Fiscal Year 25-26 (July 2025 to June 2026) with a cessation of C1 operations in June 2026, and the termination of the C1 contract thereafter;
2. Estimates of C1 Operating costs based on the payment terms and conditions of Change Order 218, Amendment 1, C1 O&M Extension, approved by the Clipper Executive Board in September 2024, and executed in November 2024;
3. Assumptions of account-based milestones based on recent Cubic project schedule submissions and estimates, including the assumption of full account-based Operations and Maintenance costs during the entire Fiscal Year (July 2025 to June 2026);

4. Estimates of operating expenses for the Customer Service Center (CSC), Fare Media, and Payment Services contracts allocated per the MOU; and
5. MTC's inclusion of \$7.3M in Float Account Interest accrued from MTC's investment of Float Account funds to fund transit operator's portion of the FY25-26 C1 Operating costs and help offset the costs of running two parallel fare collection systems. This is a continuation of MTC's proposal beginning in January 2025 to help cover the operator portion of C1 operations.

Highlights of the Clipper Draft Two Year **Capital** Budget include:

1. A continuation of the capital work required to design, test, and rollout the account-based program, with cost of the system staying consistent but with payment milestones noted in the fiscal years that the Contractor is expected to achieve these milestones based on its last schedule submittal;
2. Capital expenses associated with the other C2 contractors, including Customer Service Center, Fare Media, and Payment Services contracts, as well as estimates of technical consultant support;
3. An assumption that Senate Bill 1 State of Good Repair capital funds will not be available to the Clipper program in the long-term; and
4. General estimates of capital expenses, change orders, amendments, and other currently unknown costs after the System Completion milestone has been achieved.

Overall, Clipper staff, in coordination with MTC's Funding Program and Policy section, have been able to fully fund the capital and development and deployment work while continuing to ensure that the Clipper system has remained active and operational, and unexpected cost overruns have been limited. The program outlook is stable over the next several fiscal years.

MTC and transit operator staff will continue to work together to update the operating and capital budgets and plan to return to the Clipper Executive Board next month to obtain approval for the Clipper Two Year Budget. Staff will also plan to update the Board six months after the approval of the Clipper Budgets on how expected costs align with actual costs.

Issues:

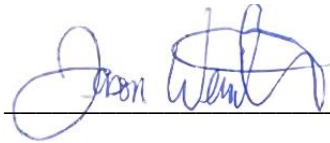
None identified.

Recommendations:

Information

Attachments:

- Attachment A: Clipper Draft Operating Budget – April 21, 2025
- Attachment B: Clipper Draft Capital Budget – March 6, 2025



Jason Weinstein

CLIPPER® OPERATING BUDGET DRAFT - APRIL 21, 2025

Item No.	Descriptions	ACTUAL FY 23/24 (\$M)	FY 24/25 (EST.) (\$M)	FY 25/26 (\$M)	FY 26/27 (\$M)	FY 27/28 (\$M)	FY 28/29 (\$M)	5 YEAR TOTAL - FY 24/25 - 28/29 (\$M)
MTC Operating Costs								
1	MTC Staff - Current Clipper Operating	0.8	0.3	3.1	3.2	3.3	3.3	15.6
2	MTC Staff - Next Gen Clipper Operating	1.3	2.4					
3	Current Clipper Operating Costs - MTC	13.0	22.7	6.2	0.0	0.0	0.0	28.9
4	Next Gen Clipper SI Operating Costs - MTC	1.9	2.1	8.6	9.9	11.4	13.1	45.1
5	Next Gen Clipper CSC Operating Costs - MTC	0.0	0.0	3.6	2.2	2.3	2.4	10.5
6	Next Gen Clipper Fare Media Operating Costs - MTC	0.0	0.0	1.5	1.3	1.4	1.4	5.6
7	Mobile App Fees - MTC	1.2	1.5	1.5	1.5	2.0	3.0	9.5
8	Clipper Operations - Misc.	0.6	0.7	1.3	1.4	1.4	1.5	6.3
9	In Person Customer Service Centers	1.1	1.2	1.0	1.1	1.1	1.2	5.5
10	Customer Education Program	2.1	2.8	2.3	2.4	2.5	2.7	12.7
11	<i>Subtotal MTC expenses</i>	<i>22.0</i>	<i>33.6</i>	<i>29.1</i>	<i>22.9</i>	<i>25.4</i>	<i>28.5</i>	<i>139.5</i>
Transit Agency Operating Costs								
12	Current Clipper Operating Costs - Transit Agencies	16.9	10.3	7.3	0.0	0.0	0.0	17.6
13	Next Gen Clipper SI Operating Costs - Transit Agencies	1.9	9.0	8.6	9.9	11.4	13.1	52.0
14	Next Gen Clipper CSC Operating Costs - Transit Agencies	0.0	0.0	3.6	2.2	2.3	2.4	10.5
15	Next Gen Clipper Payment Services Operating Costs -Transit Agencies	0.0	0.0	3.5	3.7	3.8	3.9	15.0
16	Retail Commissions	0.3	0.6	0.6	0.7	0.7	0.7	3.3
17	RTC Program	0.6	0.8	0.7	0.8	0.8	0.8	3.9
18	<i>Subtotal Transit Agency expenses</i>	<i>19.6</i>	<i>20.6</i>	<i>24.3</i>	<i>17.3</i>	<i>19.0</i>	<i>21.0</i>	<i>102.3</i>
19	Total Operating Costs (Rows 11 + 18)	41.6	54.2	53.4	40.2	44.4	49.5	241.8
Operating Revenues								
20	Transit Agency Revenue	19.6	20.6	17.0	17.3	19.0	21.0	95.0
21	Total STA Revenues	7.7	8.0	7.8	8.0	8.0	8.0	39.8
22	Regional Measure 2 (RM2) ¹	5.7	4.5	4.4	4.8	4.8	4.8	23.3
23	Low Carbon Transit Operations Program (LCTOP)	1.0	6.5	12.8	0.0	0.0	0.0	19.3
24	State of Good Repair (SB1) ²	2.9	1.6	0.0	0.0	0.0	0.0	1.6
25	Card and Fare Media Fees	1.2	1.3	1.5	4.1	4.0	4.0	14.9
26	Inactive Card Funds	2.7	2.6	0.0	0.0	0.0	0.0	2.6
26	Clipper Float Interest Account (Transit Agency C1 O&M)	0.7	10.5	7.3	0.0	0.0	0.0	17.8
Total Operating Revenue		41.6	55.6	50.8	34.2	35.8	37.8	101.5
27	Prior Year Carry Forward	7.3						
28	Net Operating Budget	7.3	8.7	6.1	0.0	(8.6)	(20.3)	

¹ Contingent upon availability and MTC Commission Approval

² Used for Next-Gen Clipper Operating Startup Costs

CLIPPER® CAPITAL BUDGET **DRAFT** - MARCH 6, 2025

Item No.	Description	ACTUAL FY23/24 (\$M)	FY 24/25 (EST.) (\$M)	FY 25/26 (\$M)	FY 26/27 (\$M)	FY 27/28 (\$M)	FY 28/29 (\$M)	5 YEAR TOTAL - FY 24/25 - 28/29 (\$M)
Capital Costs								
1	MTC Staff	\$3.0	\$3.7	\$3.6	\$3.8	\$4.0	\$4.2	\$19.3
2	Current Clipper Cards & Fare Media	\$6.3	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.0
3	Next Gen Clipper Cards & Fare Media	\$0.0	\$3.4	\$3.2	\$1.0	\$1.0	\$1.0	\$9.6
4	Consultants	\$1.9	\$2.3	\$1.7	\$1.5	\$1.5	\$1.5	\$8.5
5	C1 Capital Contract Extension	\$0.0	\$1.2	\$0.0	\$0.0	\$0.0	\$0.0	\$1.2
6	System Integrator Contract	\$32.8	\$1.7	\$6.1	\$0.0	\$0.0	\$0.0	\$7.8
7	TR4 Integration and Open Payment Deployment	\$0.8	\$0.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.6
8	Next Gen Clipper Equipment	\$24.2	\$4.7	\$0.0	\$0.0	\$0.0	\$0.0	\$4.7
9	Operator Paratransit Integration	\$0.0	\$0.0	\$2.0	\$0.0	\$0.0	\$0.0	\$2.0
10	C2 CSC	\$6.2	\$2.0	\$0.0	\$1.0	\$1.0	\$1.0	\$5.0
11	RTC and Clipper START Enhancements and Support	\$0.4	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.0
12	System Enhancements and Infrastructure Replacement	\$0.0	\$3.0	\$5.1	\$5.0	\$5.0	\$5.0	\$23.1
13	Total Expenses	\$75.6	\$24.6	\$21.7	\$12.3	\$12.5	\$12.7	\$83.7
Capital Revenue								
14	RM3	\$30.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
15	SGR	\$14.8	\$11.3	\$11.0	\$0.0	\$0.0	\$0.0	\$22.3
16	Fare Media and Card Fee Revenue	\$6.6	\$5.1	\$3.0	\$1.0	\$1.0	\$1.0	\$11.1
17	STA	\$0.0	\$2.1	\$0.0	\$0.0	\$0.0	\$0.0	\$2.1
18	Total Annual Revenue	\$51.8	\$18.5	\$14.0	\$1.0	\$1.0	\$1.0	\$35.5
19	Capital Carry Forward (prior years)	\$59.8						
20	Net Surplus / Deficit	\$36.0	\$30.0	\$22.3	\$11.0	(\$0.5)	(\$12.2)	



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0594 **Version:** 1 **Name:**

Type: Report **Status:** Informational

File created: 4/4/2025 **In control:** Clipper Executive Board

On agenda: 4/28/2025 **Final action:**

Title: RTC Clipper Access Rebrand Marketing Update

An update on the marketing plan for the public rebranding of Regional Transit Connection (RTC) to the program's new name Clipper Access at the launch of the Next Generation Clipper System (C2).

Sponsors:

Indexes:

Code sections:

Attachments: [3c 25-0594 1 RTC Clipper Access Rebrand Marketing Update](#)
[3c 25-0594 2 Sample Design of the Clipper Access Card](#)

Date	Ver.	Action By	Action	Result
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Subject:

RTC Clipper Access Rebrand Marketing Update

An update on the marketing plan for the public rebranding of Regional Transit Connection (RTC) to the program's new name Clipper Access at the launch of the Next Generation Clipper System (C2).

Presenter:

Lydia Elias, MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

April 28, 2025

Agenda Item 3c

RTC Clipper Access Rebrand Marketing Update

Subject:

An update on the marketing plan for the public rebranding of Regional Transit Connection (RTC) to the program's new name Clipper Access at the launch of the Next Generation Clipper System (C2).

Background:

Clipper is responsible for management and operation of the Regional Transit Connection (RTC) Clipper Access program, which enables customers with qualifying disabilities to travel at discounted fares on fixed-route transit services throughout the nine-county San Francisco Bay Area, using the Bay Area's regional transit fare payment system, Clipper.

The name change of this program from 'RTC' to 'Clipper Access' will align with the launch of the Next Generation Clipper System (C2). The public rollout of this rebranding will occur at the start of Customer Transition for C2. MTC staff previously brought an item to transit operator staff in July 2023 regarding this name change. The Bay Area Partnership Accessibility Committee (BAPAC) was also informed of the new Clipper Access name and was supportive of this change. Transit operator staff and the Clipper Executive Board have been made aware of the upcoming rebranding of RTC to Clipper Access through broader marketing updates by MTC staff regarding the overall Next Generation Clipper System. During this transition period the program has been referred to as 'RTC Clipper Access' by MTC and transit agencies, although publicly still known as RTC.

The upcoming public rollout of the new Clipper Access name comes from user research such as focus groups and surveys that were previously conducted that identified Clipper Access as the name that resonated most with customers and better matched what the program offers. This change will not alter the eligibility or application process for the program or its transit fare discount rates. Existing customers with an active RTC card do not need to take any action when the program is officially rebranded as Clipper Access. Customers will be able to continue to use their active RTC cards. As this rebranding coincides with the start of Customer Transition for the

C2 system, any new or replacement cards for this program beginning at that time will be issued with the new Clipper Access card design and logo (Attachment A).

MTC staff have been working with the marketing contractor, MIG, to develop various educational and marketing materials for the public rollout of the Clipper Access rebrand. These materials have target audiences such as new customers, existing customers, and outreach partners such as social service agencies and organizations that serve the disabled community as well as the transit agencies.

The materials developed to inform and educate the public regarding the RTC to Clipper Access rebranding include:

- Updated (Clipper Access) application forms
- Frequently Asked Questions (FAQs) materials for outreach partners
- Fact Sheet for customers
- Universal/palm cards in Braille for customers with visual impairments
- Content/language for outreach partners' websites
- Website updates to 511.org and Clippercard.com
- Clipper Access brochure (formerly RTC brochure)
- Informational emails to existing customers and to outreach partners
- Social posts on platforms such as Facebook, Instagram, and X

These materials, as applicable, will either be distributed to outreach partners and/or updated on the 511 and Clipper website as we approach Customer Transition for the Next Generation Clipper System. Transit agencies' customer service centers that currently process RTC applications will receive the new Clipper Access application forms for their centers as well as other materials to help inform their front-line staff of the rebrand and communicate these changes to customers.

Issues:

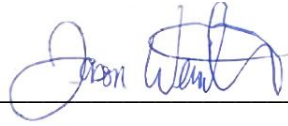
None identified.

Recommendation:

None.

Attachments:

- Attachment A: Sample Design of the Clipper Access Card

A handwritten signature in blue ink, appearing to read "Jason Weinstein", is positioned above a horizontal line.

Jason Weinstein

[https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper Executive Board/CEB2025/CEB_2025_04_28/3c_25-0594_RTC_Clipper_Access_Rebrand_Marketing_Update_v1.docx](https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper%20Executive%20Board/CEB2025/CEB_2025_04_28/3c_25-0594_RTC_Clipper_Access_Rebrand_Marketing_Update_v1.docx)

Sample Design of the Clipper Access Card

