



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

Meeting Agenda

Clipper Executive Board

Robert Powers, Chair

April Chan, Vice Chair

Monday, June 2, 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/84544594369>
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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
Eddy Cumins, Andrew B. Fremier, Carolyn M. Gonot, Julie
Kirschbaum, Salvador Llamas, Denis Mulligan, 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.** [25-0610](#) Minutes of the April 28, 2025 Meeting
- Action:** Approval
- Attachments:** [2a 25-0610 2025 04 28 Clipper Executive Board Meeting Minutes](#)
-
- 2b.** [25-0611](#) Current Clipper® Operations and Performance Update
- Update on current Clipper System operations and performance
- Action:** Information
- Presenter:** Edward Meng , MTC
- Attachments:** [2b 25-0611 Current Clipper Operations and Performance Update](#)
-
- 2c.** [25-0613](#) Clipper® In Person Customer Service Contract Amendment - Nematode Holdings, LLC (\$315,000)
- Request for approval of a contract amendment with Nematode Holdings, LLC to continue providing Clipper in-person customer services at the Bay Crossings store located in the San Francisco Ferry Building.
- Action:** Approval
- Presenter:** Alison Edwards, MTC
- Attachments:** [2c 25-0613 1 Clipper® In Person Customer Service Contract Amendment – N](#)

- 2d. [25-0614](#) Clipper® Technical Consultant Contract Actions: i. Contract Amendment - Arcadis, a California partnership (Arcadis) (\$1,000,000); ii. Contract Amendment - Invoke Technologies, Inc. (Invoke) (\$125,000); iii. Contract Amendment - Jacobs Engineering Group (Jacobs) (\$500,000).

Request for approval of the listed technical consultant contract actions to add \$1,000,000 to the Arcadis contract to provide technical advice to MTC and the transit operators to support the implementation of the Next Generation Clipper (C2) System; \$125,000 to the Invoke contract for program management support services; and \$500,000 to the Jacobs contract for technical, planning and implementation support.

Action: Approval

Presenter: Edward Meng, MTC

Attachments: [2d 25-0614 1 Arcadis Invoke Jacobs](#)

3. Approval

- 3a. [25-0804](#) Clipper® Two Year Budget and Work Plan

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

Action: Approval

Presenter: Edward Meng, MTC

Attachments: [3a 25-0804 1 Clipper Two Year Budget](#)
[3a 25-0804 2 20250523 Operating Revenue and Budget](#)
[3a 25-0804 3 20250523 Capital Revenue and Budget](#)

- 3b. [25-0805](#) Clipper® Customer Education and Outreach Contract Actions: Contract Amendment - Moore Iacofano Goltsman, Inc. (MIG) (\$3,100,000); Contract Amendment - Caribou Public Relations, Inc. (Caribou) (\$400,000)

Request for approval of the listed consultant contract actions to add \$3,100,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

Action: Approval

Presenter: Lysa Hale, MTC

Attachments: [3b 25-0805 1 Contract Actions - MIG, Inc. \(\\$3,100,000\) and Caribou, Inc. \(\\$400,000\)](#)

4. Information

4a. [25-0612](#) 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 Mark Stadtherr and Anthony DeVito, Cubic Transportation Systems

Attachments: [4a 25-0612 1 Clipper Schedule and Implementation Update](#)
 [4a 25-0612 2 CEB Status Report 2025-06-02](#)
 [4a 25-0612 3 Clipper Schedule Attachment](#)

5. Executive Director's Report – Weinstein

6. 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.*

7. Adjournment / Next Meeting

The next meeting of the Clipper® Executive Board is scheduled to be held at 1:00 p.m. on Monday June 23, 2025 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 #: 25-0610 **Version:** 1 **Name:**

Type: Minutes **Status:** Consent

File created: 4/8/2025 **In control:** Clipper Executive Board

On agenda: 6/2/2025 **Final action:**

Title: Minutes of the April 28, 2025 Meeting

Sponsors:

Indexes:

Code sections:

Attachments: [2a 25-0610 2025 04 28 Clipper Executive Board Meeting Minutes](#)

Date	Ver.	Action By	Action	Result
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Subject:
Minutes of the April 28, 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, 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.

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Attendee Link: <https://us06web.zoom.us/j/89264528659>

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+16694449171,,89264528659# US

Join by Telephone (for higher quality, dial a number based on your current location) US:
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Webinar ID: 892 6452 8659

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

Detailed instructions on participating via Zoom are available at:

<https://bayareametro.zoom.us/j/89264528659>

<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**

Present: 8 - Chair Powers, Vice Chair Chan, Board Member Fremier, Board Member Gonot, Board Member Kelly, Board Member Kirschbaum, Board Member Mulligan, and Board Member Wegener

Absent: 1 - Board Member Cumins

2. Consent Calendar

The following individuals spoke on this Item:

Adina Levin, Seamless Bay Area, and Roland Lebrun.

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

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

Absent: 1 - Board Member Cumins

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](#)

The following individuals spoke on this Item:

Aleta Dupree, Team Folds; Adina Levin, RNM Customer Advisory Group; Mike Chen, and Bryan Culbertson

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](#)

The following individuals spoke on this Item:

Bryan Culbertson, Adina Levin

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](#)

The following individuals spoke on this Item:

Aleta Dupree.

4. Director's Report – Jason Weinstein

The following individuals spoke on this Item:
Effie Lee, and Adina Levin

5. Public Comment / Other Business

The following individuals spoke on this Item:
Aleta Dupree, Roland Lebrun, Adina Levin

6. Adjournment / Next Meeting

The next Clipper Executive Board Meeting date and time will be duly noticed.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0611 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 4/8/2025 **In control:** Clipper Executive Board
On agenda: 6/2/2025 **Final action:**
Title: Current Clipper® Operations and Performance Update
Update on current Clipper System operations and performance

Sponsors:

Indexes:

Code sections:

Attachments: [2b 25-0611 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:

Edward Meng , MTC

Recommended Action:

Information

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 2b

Current Clipper® Operations and Performance Update

Subject:

Update on current Clipper System operations and performance

Background:

Transaction and Sales

In April 2025, Clipper processed over 15.6 million transactions and settled over \$37 million in revenue, an increase of 14.7% and 19.7%, respectively, compared to April 2024.

Clipper Mobile Card Adoption and Usage

Since the launch of the mobile Clipper card in April 2021, over 3.9 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 April 2025 alone, 37.2% of Clipper trips were taken using a mobile card, compared to 31.2% in April 2024.

Clipper START Card Issuance and Usage

In April 2025, the Clipper START program approved 1,808 applications. There were 75% more Clipper START trips in April 2025 than in April 2024.

Issues:

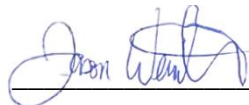
None identified.

Recommendations:

Information.

Attachments:

- None



Jason Weinstein



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0613 **Version:** 1 **Name:**
Type: Report **Status:** Committee Approval
File created: 4/8/2025 **In control:** Clipper Executive Board
On agenda: 6/2/2025 **Final action:**
Title: Clipper® In Person Customer Service Contract Amendment - Nematode Holdings, LLC (\$315,000)

Request for approval of a contract amendment with Nematode Holdings, LLC to continue providing Clipper in-person customer services at the Bay Crossings store located in the San Francisco Ferry Building.

Sponsors:

Indexes:

Code sections:

Attachments: [2c 25-0613 1 Clipper® In Person Customer Service Contract Amendment – Nematode Holdings, LLC](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® In Person Customer Service Contract Amendment - Nematode Holdings, LLC (\$315,000)

Request for approval of a contract amendment with Nematode Holdings, LLC to continue providing Clipper in-person customer services at the Bay Crossings store located in the San Francisco Ferry Building.

Presenter:

Alison Edwards, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 2c

Clipper® In Person Customer Service Contract Amendment – Nematode Holdings, LLC (\$315,000)

Subject:

Request for approval of a contract amendment with Nematode Holdings, LLC to continue providing Clipper in-person customer services at the Bay Crossings store located in the San Francisco Ferry Building.

Background:

The Clipper Program has historically provided Clipper customer services at the Bay Crossings store at the San Francisco Ferry Building. In addition to issuing new Clipper cards and selling value, this service center immediately replaces lost and damaged cards; accepts cash payment for card replacement fees; and distributes Clipper START materials. Similar customer services are being provided by TTEC at the Embarcadero BART/Muni Metro location through a previously approved contract in the amount of \$1.7 million through June 30, 2027.

Under the proposed contract amendment, Nematode would continue to provide Clipper customer services at its Bay Crossings store, as well as operate and maintain the Real-Time Ferry Departure Flap Sign System, in the Ferry Building. MTC first executed a sole source contract with Nematode in December 2010 to offer Clipper services. In July 2020, MTC executed a new sole source contract with Nematode due to Bay Crossings still being the only Ferry Building vendor selling transit value and providing transportation information on behalf of multiple partners. During the first eight months of the current fiscal year, this location has issued over 8,000 Clipper cards and completed over 20,000 sales transactions. The amendment would extend operations through June 30, 2026.

Nematode Holdings is neither a small business nor a disadvantaged business enterprise and has no subcontractors.

Issues:

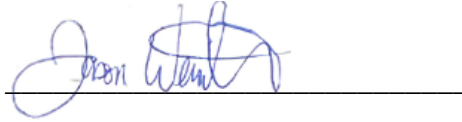
None identified.

Recommendation:

Staff recommends that the Board approve a contract amendment with Nematode Holdings, LLC in an amount not to exceed \$315,000, to provide in-person customer services to the Clipper program, as described above.

Attachments:

None.



Jason Weinstein

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor (or “Consultant”):	Nematode Holdings, LLC San Francisco, CA
Work Project Title:	Clipper Customer Service Center Operations at San Francisco Ferry Building (Bay Crossings)
Purpose of Project:	Provide Clipper in-person customer services, including issuance of new and replacement cards; and maintain ferry schedule flap sign display
Brief Scope of Work:	Contractor shall provide trained staff to support a range of Clipper customer services and the maintenance of the ferry schedule display
Project Cost Not to Exceed:	\$315,000 (this amendment) Total Contract value including amendments before this amendment is \$1,538,284 Total Contract amount with this amendment is \$1,853,284
Funding Source:	Regional Measure 2 Marketing and Operations
Fiscal Impact:	Funds dependent on approval of the FY 2025-26 MTC agency budget
Motion by Board:	That a contract amendment, with Nematode Holdings, LLC for the purposes described above and in the Clipper Executive Director’s summary sheet dated June 2, 2025, is hereby approved by the Clipper Executive Board.
Clipper Executive Board:	<hr/> Robert Powers, Chair
Approved:	June 2, 2025



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #:	25-0614	Version:	1	Name:	
Type:	Report	Status:		Committee Approval	
File created:	4/8/2025	In control:		Clipper Executive Board	
On agenda:	6/2/2025	Final action:			
Title:	Clipper® Technical Consultant Contract Actions: i. Contract Amendment - Arcadis, a California partnership (Arcadis) (\$1,000,000); ii. Contract Amendment - Invoke Technologies, Inc. (Invoke) (\$125,000); iii. Contract Amendment - Jacobs Engineering Group (Jacobs) (\$500,000). Request for approval of the listed technical consultant contract actions to add \$1,000,000 to the Arcadis contract to provide technical advice to MTC and the transit operators to support the implementation of the Next Generation Clipper (C2) System; \$125,000 to the Invoke contract for program management support services; and \$500,000 to the Jacobs contract for technical, planning and implementation support.				
Sponsors:					
Indexes:					
Code sections:					
Attachments:	2d 25-0614 1 Arcadis Invoke Jacobs				

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® Technical Consultant Contract Actions: i. Contract Amendment - Arcadis, a California partnership (Arcadis) (\$1,000,000); ii. Contract Amendment - Invoke Technologies, Inc. (Invoke) (\$125,000); iii. Contract Amendment - Jacobs Engineering Group (Jacobs) (\$500,000).

Request for approval of the listed technical consultant contract actions to add \$1,000,000 to the Arcadis contract to provide technical advice to MTC and the transit operators to support the implementation of the Next Generation Clipper (C2) System; \$125,000 to the Invoke contract for program management support services; and \$500,000 to the Jacobs contract for technical, planning and implementation support.

Presenter:

Edward Meng, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 2d

Technical Consultant Contract Actions: i. Contract Amendment – Arcadis, a California partnership (Arcadis) (\$1,000,000); ii. Contract Amendment – Invoke Technologies, Inc. (Invoke) (\$125,000); iii. Contract Amendment – Jacobs Engineering Group (Jacobs) (\$500,000)

Subject:

Request for approval of the listed technical consultant contract actions to add \$1,000,000 to the Arcadis contract to provide technical advice to MTC and the transit operators to support the implementation of the Next Generation Clipper (C2) System; \$125,000 to the Invoke contract for program management support services; and \$500,000 to the Jacobs contract for technical, planning and implementation support.

Background:

- Contract Amendment – Arcadis, a California partnership (Arcadis) (\$1,000,000)

In 2015, MTC issued a Request for Proposal for a consultant to advise and help manage the procurement and implementation of the Next Generation Clipper (C2) System and awarded a contract for this work to Arcadis (formerly the IBI Group). The contract initially provided for a contract period through June 2020 with options to extend up to 10 years. The Arcadis contract term was set to allow MTC and the operators the opportunity to evaluate upcoming needs for technical advisor support following critical procurement, system design, and implementation milestones.

The Clipper Executive Board approved amendments to extend the contract period and add funding to the contract in April 2019, June 2021, December 2022, January 2024 and May 2024. The most recent amendment to the contract was the addition of \$1,200,000 to provide funds through June 30, 2025.

The proposed amendment would extend the period of performance to June 30, 2026 and add \$1,000,000 to the contract with Arcadis, whose continued support is required to deliver the C2 System. Specific tasks to be supported by this amendment would include providing technical

advice and oversight; supporting management of the System Integrator and Customer Service Center contracts; and overseeing design, testing, and customer transition activities.

- Contract Amendment – Invoke Technologies, Inc. (Invoke) (\$125,000)

The contract was the result of a direct selection of Invoke from the 2020 Electronic Payments Section Consultant Assistance Bench to provide program management support services for the implementation of the C2 System. The Clipper Executive Board approved the contract in the amount of \$500,000 at its May 17, 2021 meeting and staff subsequently amended the contract on April 1, 2023 (time extension to June 30, 2024), December 1, 2023 (time extension to June 30, 2025 and addition of \$100,000) using Executive Director Authority, and July 1, 2024 (addition of \$250,000 approved by this board at the May 20, 2024 meeting). This amendment adds \$125,000 to the contract to enable Invoke to provide ongoing assistance based on its exceptional experience supporting the implementation of contactless fare payment systems and mobile apps for programs such as LA Metro's TAP and Chicago's Ventra.

- Contract Amendment – Jacobs Engineering Group (Jacobs) (\$500,000)

Jacobs proposed and was pre-qualified for professional services under the Electronic Payments Section (EPS) Consultant Assistant Bench that was competitively procured and established in 2020 for fare payment system and electronic tolling support. Under the EPS Consultant Assistant Bench, Jacobs is qualified to deliver services under four categories: program management, planning, operational monitoring and reporting, and technology oversight. In February and June 2022, the Clipper Executive Board approved a contract with Jacobs in an amount of \$1,000,000 to perform technical, planning and operational work. Since that approval date, this contract has been amended once in June 2024 to extend the contract period and add funding to the contract. The proposed amendment would add an additional \$500,000 to the Jacobs contract for their continued work.

Issues:

None identified.

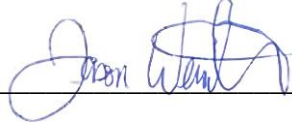
Recommendation:

Staff recommends that the Clipper Executive Board approve a contract amendment for Arcadis in an amount not to exceed \$1,000,000; a contract amendment for Invoke in an amount not to

exceed \$125,000; and a contract amendment for Jacobs in an amount not to exceed \$500,000 to provide consultant and technical advisory support, as described above.

Attachments:

None.



Jason Weinstein

[https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper Executive Board/CEB2025/CEB_2025_06_02/2d_25-0614_1__Arcadis Invoke Jacobs_v1.docx](https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper%20Executive%20Board/CEB2025/CEB_2025_06_02/2d_25-0614_1__Arcadis%20Invoke%20Jacobs_v1.docx)

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor (or “Consultant”):	Arcadis, A California Partnership Seattle, WA
Work Project Title:	Next Generation Clipper System Consultant Support
Purpose of Project:	Provide technical support, advice and management services to support delivery of the Next Generation Clipper System.
Brief Scope of Work:	Provide technical advice services through June 2026
Project Cost Not to Exceed:	\$1,000,000 (this amendment) Total contract amount including amendments before this amendment = \$13,650,000 Total contract amount with this amendment = \$14,650,000
Funding Source:	FTA, FHWA, OBAG 1 & 2, STP, CMAQ, TCP, RM2 Capital, RM3, and SGR (State of Good Repair)
Fiscal Impact:	Funds dependent on the approval of the FY 2025-26 MTC agency budget
Motion by Board:	That a contract amendment with Arcadis for the purposes described above and in the Clipper Executive Director’s summary sheet dated June 2, 2025 is hereby approved by the Clipper Executive Board.
Clipper Executive Board:	<hr/> Robert Powers, Chair
Approved:	June 2, 2025

Request for Board Approval

Summary of Proposed Contract Amendment

Contractor (or “Consultant”):	Invoke Technologies, Inc. (Invoke) Del Mar, CA
Work Project Title:	Consultant services for the implementation of the Next Generation Clipper® (C2) System
Purpose of Project:	Program management, technical, strategic and long-range planning in support of the implementation of C2
Brief Scope of Work:	Provide consultant services for program management, planning, operational monitoring and reporting, and technology oversight
Project Cost Not to Exceed:	\$125,000 (this amendment) Total contract amount including amendments before this amendment = \$850,000 Total contract amount with this amendment = \$975,000
Funding Source:	FTA, FHWA, OBAG 1 & 2, STP, CMAQ, TCP, RM2 Capital, RM3, and SGR (State of Good Repair)
Fiscal Impact:	Funds dependent on the approval of the FY 2025-26 MTC agency budget
Motion by Board:	That a contract amendment with Invoke, for the purposes described above and in the Clipper Executive Director’s summary sheet dated June 2, 2025, is hereby approved by the Clipper Executive Board subject to the adoption of the FY 2025-26 MTC agency budget.
Clipper Executive Board:	<hr/> Robert Powers, Chair
Approved:	June 2, 2025

Request for Board Approval

Summary of Proposed Contract Amendment

Consultant:	Jacobs Engineering Inc. San Francisco, CA
Work Project Title:	On-Call Consultant Assistance for Next Generation Clipper®.
Purpose of Project:	Consultant will provide support to implement Next Generation Clipper.
Brief Scope of Work:	To provide technical, planning and implementation support for the Next Generation Clipper system, including support for third-party integration, management of portals, support for the new C2 fare media procurement and other tasks.
Project Cost Not to Exceed:	\$500,000 (this amendment) Total contract amount including amendments before this amendment = \$1,660,000 Total contract amount with this amendment = \$2,160,000
Funding Source:	FTA, FHWA, OBAG 1 & 2, STP, CMAQ, TCP, RM2 Capital, RM3, and SGR (State of Good Repair)
Fiscal Impact:	Funds dependent on the approval of the FY 2025-26 MTC agency budget
Motion by Board:	That a contract amendment with Jacobs for the purposes described above and in the Clipper Executive Director's summary sheet dated June 2, 2025 is hereby approved by the Clipper Executive Board.
Clipper Executive Board:	<hr/> Robert Powers, Chair
Approved:	June 2, 2025



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 25-0804 **Version:** 1 **Name:**
Type: Report **Status:** Committee Approval
File created: 5/14/2025 **In control:** Clipper Executive Board
On agenda: 6/2/2025 **Final action:**
Title: Clipper® Two Year Budget and Work Plan

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

Sponsors:

Indexes:

Code sections:

Attachments: [3a 25-0804 1 Clipper Two Year Budget](#)
[3a 25-0804 2 20250523 Operating Revenue and Budget.](#)
[3a 25-0804 3 20250523 Capital Revenue and Budget](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® Two Year Budget and Work Plan

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

Presenter:

Edward Meng, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 3a

Clipper® Two Year Budget and Work Plan

Subject:

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

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 approval are the Clipper Operating Budget (Attachment A) and the Clipper 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. MTC has presented and shared the Clipper budget with transit agency staff, who have indicated support for the item.

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 payments 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 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, in order to 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.

At the April 2025 Clipper Executive Board meeting, Board members inquired about the Operating deficit beyond the two years being requested for approval. MTC's operating budgets are approved annually, so even though we show five years of projected costs, we don't typically commit to specific funding beyond the two years being approved by the Clipper Executive Board. MTC will continue to work to identify potential fund sources to help bridge the gap and managing the program with the knowledge that this deficit exists and identifying the need for funding in the future to mitigate it. In the budget presented to the Board, we have updated some fund sources in the future years to indicate potential sources of funding that have not yet been committed, although they are likely to be available to the program. Knowing that this upcoming deficit exists, Clipper staff will also work over the next several budget cycles to identify potential areas for cost savings in the near term.

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

1. A continuation of the capital work required to design, test, and ultimately 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. The full inclusion of Regional Measure 3 (RM3) funds, which completed the final funding gaps for the System Integrator contract;

4. 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
5. General estimates of capital expenses, change orders, amendments, and other currently unknown costs after the System Completion milestone has been achieved.

At the April 2025 Board meeting, Board members requested information on staffing costs. The Clipper program has operated consistently for years with a staffing level of around 15 full time equivalents (FTE) in order to support ongoing Clipper contract management and oversight, program administration, maintenance of regional programs delivered through the Clipper platform, and customer outreach and communications. In the last two years, Clipper staff have identified the need and funding for three additional positions in order to address Clipper's growing portfolio of services and programs, including Clipper START, Clipper Access (RTC), Clipper BayPass, asset management, hardware and software deployment, retail network oversight focusing on Equity Priority Communities, and direct transit operator support, including support for this Board.

Overall, MTC has 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 will continue to keep transit agency staff updated on the operating and capital budgets and plan to return to the Clipper Executive Board before the end of the calendar year with an update on the Clipper budget and on how expected costs align with actual costs.

Issues:

None identified.

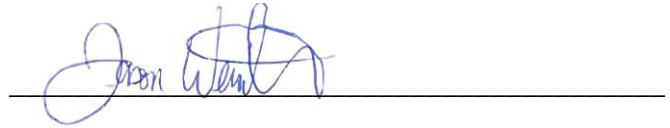
Recommendations:

Clipper staff recommend that the Clipper Executive Board approve the Clipper Two Year Operating and Capital Budgets for FY 2025-26 and FY 2026-27.

Attachments:

- Attachment A: Clipper Operating Budget – May 13, 2025

- Attachment B: Clipper Capital Budget – May 23, 2025



Jason Weinstein

[https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper Executive Board/CEB2025/CEB_2025_06_02/4a_Clipper Two Year Budget_v1.docx](https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper%20Executive%20Board/CEB2025/CEB_2025_06_02/4a_Clipper%20Two%20Year%20Budget_v1.docx)

CLIPPER® OPERATING BUDGET - MAY 23, 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>	22.0	33.6	29.1	22.9	25.4	28.5	139.5
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>	19.6	20.6	24.3	17.3	19.0	21.0	102.3
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	13.0	0.0	TBD	TBD	19.5
24	State of Good Repair (SB1) ²	2.9	1.6	0.0	0.0	TBD	TBD	1.6
25	Card and Fare Media Fees	1.2	1.3	2.0	3.5	4.0	4.0	14.8
26	Inactive Card Funds	2.7	2.6	0.0	0.0	TBD	TBD	2.6
27	Clipper Float Interest Account	0.7	10.5	7.3	0.0	TBD	TBD	17.8
Total Operating Revenue		41.6	55.6	51.5	33.6	35.8	37.8	101.6
28	Carry Forward from Prior FY		7.3	8.7	6.8	0.2	(8.4)	
29	Net Operating Budget (Carry Forward to Next FY)		8.7	6.8	0.2	(8.4)	(20.1)	

¹ Contingent upon availability and MTC Commission Approval

² Used for Next-Gen Clipper Operating Startup Costs

CLIPPER® CAPITAL BUDGET - MAY 23, 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 (from prior FY)	\$59.8	\$36.0	\$30.0	\$22.3	\$11.0	(\$0.5)	
20	Net Surplus/Deficit (carry forward to next FY)	\$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 #: 25-0805 **Version:** 1 **Name:**
Type: Report **Status:** Committee Approval
File created: 5/14/2025 **In control:** Clipper Executive Board
On agenda: 6/2/2025 **Final action:**
Title: Clipper® Customer Education and Outreach Contract Actions: Contract Amendment - Moore Iacofano Goltsman, Inc. (MIG) (\$3,100,000); Contract Amendment - Caribou Public Relations, Inc. (Caribou) (\$400,000)

Request for approval of the listed consultant contract actions to add \$3,100,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

Sponsors:

Indexes:

Code sections:

Attachments: [3b 25-0805 1 Contract Actions - MIG, Inc. \(\\$3,100,000\) and Caribou, Inc. \(\\$400,000\)](#)

Date	Ver.	Action By	Action	Result
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Subject:

Clipper® Customer Education and Outreach Contract Actions: Contract Amendment - Moore Iacofano Goltsman, Inc. (MIG) (\$3,100,000); Contract Amendment - Caribou Public Relations, Inc. (Caribou) (\$400,000)

Request for approval of the listed consultant contract actions to add \$3,100,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

Presenter:

Lysa Hale, MTC

Recommended Action:

Approval

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 3b

Clipper Customer Education and Outreach Contracts: Contract Amendments – Moore Iacofano Goltzman, Inc. (MIG) (\$3,100,000); Caribou Public Relations, Inc. (Caribou) (\$400,000)

Subject:

Request for approval of the above-referenced consultant contract actions to add \$3,100,000 to the MIG contract to provide customer education support to the Next Generation Clipper program and advertising for the Clipper START program; and \$400,000 to the Caribou contract to provide Clipper START outreach assistance.

Background:

MTC annually contracts with a customer education firm to develop and implement advertising campaigns, produce materials, manage the Clipper website, produce signage, manage Clipper social media, and conduct customer research. The contractor also plans, develops and implements customer education and marketing for both Clipper in general and the Clipper START program, among other tasks. The current contract for this work expires June 30, 2026.

In 2022, MTC selected MIG through a mini procurement process for a new contractor after issuing a Request for Proposals to nine firms who had qualified for MTC's Consultant – 2020 Electronic Payments Consultant Assistance – Cycle 1. Their contract was approved by the Clipper Executive Board and MTC's Operations Committee.

For the coming fiscal year, staff anticipates the customer education contractor will develop and implement a wide range of strategies to educate current customers, new customers, special target groups (such as families and visitors) and stakeholders about the Next Generation Clipper system. Tasks will include but are not limited to:

- Development and deployment of new web content and design;
- Large-scale email distribution campaigns;
- Social media campaigns;
- A minimum of 15 educational videos;
- Brochures for customers;

- Large-scale advertising campaigns;
- Presentations for executives and other stakeholders;
- Training materials for the operator marketing and customer service staff to serve as quick reference guides and remind them of changes in Clipper;
- Customer education materials transit operators can use to educate their customers;
- Presentations to citizen advisory committee and other groups as needed;
- Media events and other media relations;
- Continued marketing of Clipper mobile payment including ambassador outreach as needed.

The customer education contractor also provides all advertising services to promote growth of the Clipper START program. In 2025-26, that will include but not be limited to:

- Videos of testimonials and personal stories reflect actual and potential customers;
- Social media campaigns on Facebook, Instagram and TikTok featuring videos;
- Social media influencer campaign;
- Direct mail;
- Community-based organization and transit agency toolkits; and
- Updates to the program website.

Clipper also contracts with a firm to conduct community-based outreach in support of the Clipper START means-based transit fare discount program. Since May 2023, the contractor serving in this capacity has been Caribou. This contract is set to expire June 30, 2026.

For fiscal year 2025-2026, we anticipate the following specific tasks for the outreach contractor:

- Contact community-based organizations (CBOs) to schedule participation in existing events or schedule special Clipper START-specific events to educate participants about the program and how to apply;
- Post flyers and posters about Clipper START in public places such as grocery stores, laundromats and other locations in equity priority communities. At the same time, distribute brochures to libraries for distribution; and

- Subcontract with up to 16 CBOs to have them conduct targeted outreach to their service populations.

In April 2023, MTC selected Caribou through a direct select process approved by the MTC Executive Director. Caribou is on the Consultant Bench: 2020 Electronic Payments Consultant – Cycle 1.

Caribou is a disadvantaged business enterprise.

Issues:

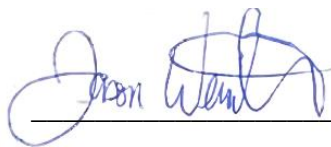
None identified.

Recommendations:

Staff recommends the Clipper Executive Board authorize the MTC Executive Director or designee to negotiate and enter a contract amendment with MIG in an amount not to exceed \$3,100,000 for customer education consultant services to the Clipper and Clipper START programs and to enter into a contract amendment with Caribou in an amount not to exceed \$400,000 for Clipper START outreach subject to approval of the MTC 2025-26 budget.

Attachments:

- None



Jason Weinstein

Request for Committee Approval

Summary of Proposed Contract Amendment

Work Item No.:	1220/1311
Consultant:	Moore Iacofano Goltsman, Inc. (MIG). Berkeley, CA
Work Project Title:	Clipper Customer Education
Purpose of Project:	To provide customer education and marketing for Clipper and Clipper START
Brief Scope of Work:	Provide advertising, material development, social media management, research, presentations, training, ambassador outreach and other tasks for the Next Generation Clipper System and Clipper START as needed
Project Cost Not to Exceed:	\$3,100,000 (this amendment) Total contract amount including amendments before this amendment = \$8,500,000 Total contract amount with this amendment = \$11,600,000
Funding Source:	SB1 State of Good Repair, Clipper Card Fee Account, Clipper Float Account, Clipper Inactive Card Funds, Regional Measure 2 Marketing, Regional Measure 2 Operating, State Transit Assistance, Low Carbon Transit Operations Program
Fiscal Impact:	Pending approval of the MTC Fiscal Year 2025-2026 budget
Motion by Committee:	That the contract amendment with MIG for customer education services as described above and in the Clipper Executive Board Summary Sheet dated June 2, 2025 is hereby approved by the Clipper Executive Board.
Regional Network Management Committee:	
	<hr/> Robert Powers, Chair
Approved:	June 2, 2025

Request for Committee Approval

Summary of Proposed Contract Amendment

Work Item No.:	1311
Consultant:	Caribou Public Relations, Inc. Berkeley, CA
Work Project Title:	Clipper START Outreach Services
Purpose of Project:	To conduct outreach to educate people about the Clipper START program and to encourage enrollment
Brief Scope of Work:	Conduct outreach through community-based organizations, schedule and staff outreach events, and post information about program
Project Cost Not to Exceed:	\$400,000 (this amendment) Total contract amount including amendments before this amendment = \$920,000 Total contract amount with this amendment = \$1,320,000
Funding Source:	State Transit Assistance, Low Carbon Transit Operations Program
Fiscal Impact:	Pending approval of the MTC Fiscal Year 2025-2026 budget
Motion by Committee:	That the contract amendment with Caribou Public Relations, Inc. for Clipper START outreach services described above and in the Clipper Executive Board Summary Sheet dated June 2, 2025 is hereby approved by the Clipper Executive Board.
Regional Network Management Committee:	
blank	<hr/> Robert Powers, Chair
Approved:	June 2, 2025



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #:	25-0612	Version:	1	Name:	
Type:	Report	Status:		Informational	
File created:	4/8/2025	In control:		Clipper Executive Board	
On agenda:	6/2/2025	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:	4a 25-0612 1 Clipper Schedule and Implementation Update				
	4a 25-0612 2 CEB Status Report 2025-06-02				
	4a 25-0612 3 Clipper Schedule Attachment				

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 Mark Stadtherr and Anthony DeVito, Cubic Transportation Systems

Recommended Action:
Information

Attachments:

Clipper® Executive Board

June 2, 2025

Agenda Item 4a

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 (CEB) meeting on April 28, progress has continued on all activities remaining in the lead-up to Customer Transition, with particular focus on the near-term critical- and near-critical-path activities identified in the last meeting. Several of the critical activities planned for completion in May were not completed on schedule or remain incomplete:

- Tasks completed late:
 - Fare card fulfillment end-to-end testing
 - Bulk migration testing
- Incomplete tasks as of May 29, 2025:
 - Complete "field verify" System Integration Test (SIT) cases
 - Complete Institutional & Transit Benefits (ITB) portal SIT cases
 - Deploy and test TeleCheck (bank account payment) integration
 - Discount application/fulfillment end-to-end testing

We have proceeded with the next pilot phase testing the components that are available. To accommodate the one-month slip of items that have taken longer to complete, we will need to extend the pilot testing period by at least one month. This will result in the start of Customer Transition being delayed by at least that same period. This places the estimated date for the start of Customer Transition in late August. However, as reported each month, there are remaining risks to the schedule that continue to have the potential to further push out the start of Customer Transition.

Updates on the key high-level activities identified in April's CEB meeting are as follows:

- **Field testing:** Testing by staff of system components available in the production environment continues, including fare validators (and associated fare rule configuration), fare inspection devices, plastic and mobile fare media, customer website, and mobile app. Testing has begun on newly released components and functions, including fare card orders and fulfillment, discount card application submittals and processing, the Customer Service Terminal for in-person customer service centers, and updated Retail Device software for Clipper retail locations.
- **Training:** Two fare inspection device training sessions have been held for transit operator staff. Revisions to training materials for other components continue in preparation for upcoming training sessions. The training risk to schedule has been resolved given the additional time added.
- **BART hardware:** Fare gate validator installations are nearly complete systemwide. Ticket vending machine validator testing and installations continue.
- **VenTek ticket vending machines:** Mechanical testing of ticket stock was successful; software configuration and testing continues.
- **Mobile integration:** Field testing of account-based mobile cards in Apple wallet continues. Cubic software release planned soon to unblock testing of Android mobile cards and migration testing for both Apple and Android.

Key upcoming critical- and near-critical-path activities, some of which are now new risks to schedule, are the following:

- Institutional & Transit Benefits (ITB) portal integration testing and pilot validation
- TeleCheck (bank account payment) integration deployment and testing
- Discount application fulfillment end-to-end testing
- Bulk migration pilot testing
- Mobile card migration pilot testing
- Deploy and test back-office and ITB bug fixes
- VenTek ticket vending machine software deployment

Staff will continue to monitor and assist with expediting ongoing activities in advance of Customer Transition. We will report back at the next CEB meeting on continued 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 expanded set of risks, new risks have been added and are italicized below:

- BART TVM integration and installation
- VenTek TVM integration
- Mobile wallet integration
- Fixes for field testing issues
- *Institutional & Transit Benefits (ITB) portal integration and validation*
- *TeleCheck (bank account payment) integration and migration testing*
- *Discount application fulfillment testing*
- *Bulk migration pilot testing*

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 the installation of Customer Service Terminals at in-person customer service center locations.

Issues:

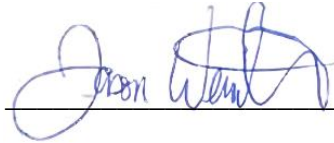
Schedule risks described above

Recommendations:

Information

Attachments:

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



Jason Weinstein

[https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper Executive Board/CEB2025/CEB_2025_01_27/3a_25-0086_1_Clipper_Schedule_and_Implementation_Update_v4.docx](https://bayareametro.sharepoint.com/sites/committees/CommitteeDocs/Clipper%20Executive%20Board/CEB2025/CEB_2025_01_27/3a_25-0086_1_Clipper_Schedule_and_Implementation_Update_v4.docx)



Next Generation Clipper Program

Executive Summary Status Report – June 2, 2025

Summary

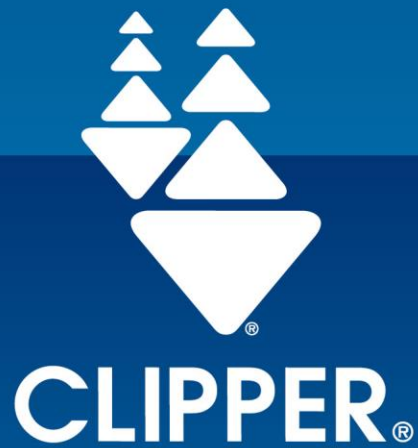
- Pre-Transition System Integration Testing (SIT) wrap-up continues with testing of fixes and updates ongoing in lab environment. Account-based system field testing and pilot testing ramp-up continues.
- BART and Muni fare gate validator installation complete. BART ticket vending machine (TVM) validator installation continues.
- Fare Inspection device deliveries and Customer Service Terminal installations continue.
- 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:				
○ Fare inspection device deliveries (cont'd)	•	•	•	ongoing
○ BART TVM validator installation (cont'd)	•	•	•	ongoing
• System Testing:				
○ Account-based system field testing (cont'd)	•	•		ongoing

Upcoming Activities/Deliverables

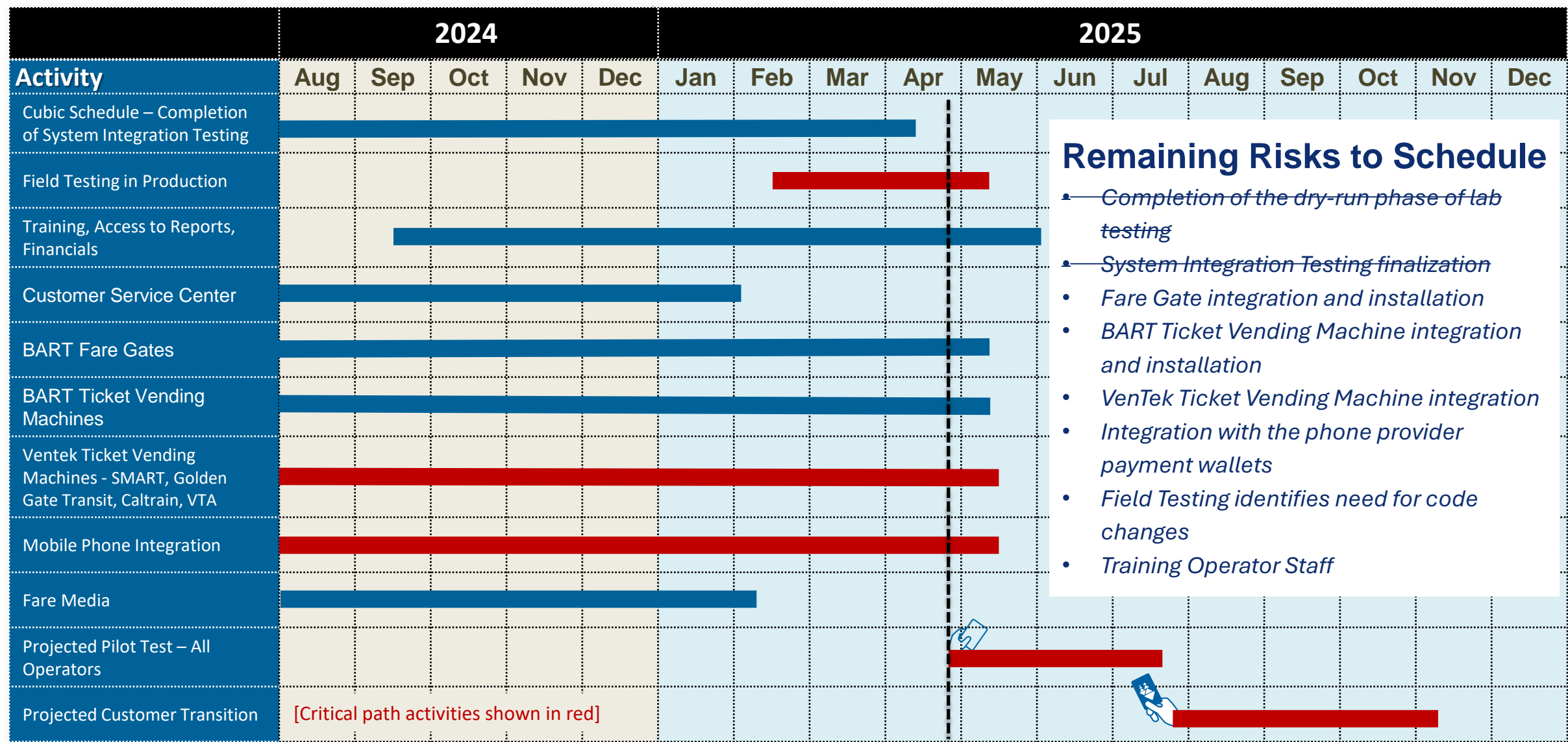
	MTC/Arcadis	Cubic	Operators	Date
• New Devices:				
○ BART TVM validator installation (cont'd)	•	•	•	ongoing
○ Fare inspection device deliveries (cont'd)	•	•	•	ongoing
○ Customer Service Terminal installation	•	•	•	ongoing
• System Testing:				
○ Account-based system field testing (cont'd)	•	•	•	ongoing
○ Pilot Test	•	•	•	May–Jun
• Account-based System Documentation:				
○ Manuals & Training Materials resubmittal review (cont'd)	•		•	ongoing
• Clipper Executive Board Meeting	•		•	Jun 23



Clipper® Next Generation Schedule

Clipper Executive Board
June 2, 2025


Schedule, Remaining Risks & Critical Path – from CEB on April 28, 2025



Progress since April 28, 2025, CEB meeting

- **Field testing:**
 - Started testing fare card orders/fulfillment, discount card applications, and retail devices
 - Continued testing fare validators, inspection devices, fare media, website, and mobile app
- **Training:**
 - Operator training sessions held for inspection devices
 - Training materials being finalized for upcoming sessions
- **BART validators:**
 - Fare gate installations nearly complete
 - Ticket Vending Machine testing and installations continue
- **Muni fare gate validators:**
 - Installation completed
- **VenTek TVMs:**
 - Mechanical testing of fare media complete
 - Software configuration and testing progressing
- **Mobile integration:**
 - Mobile card field testing continues
 - Migration functionality ready for deployment for field testing

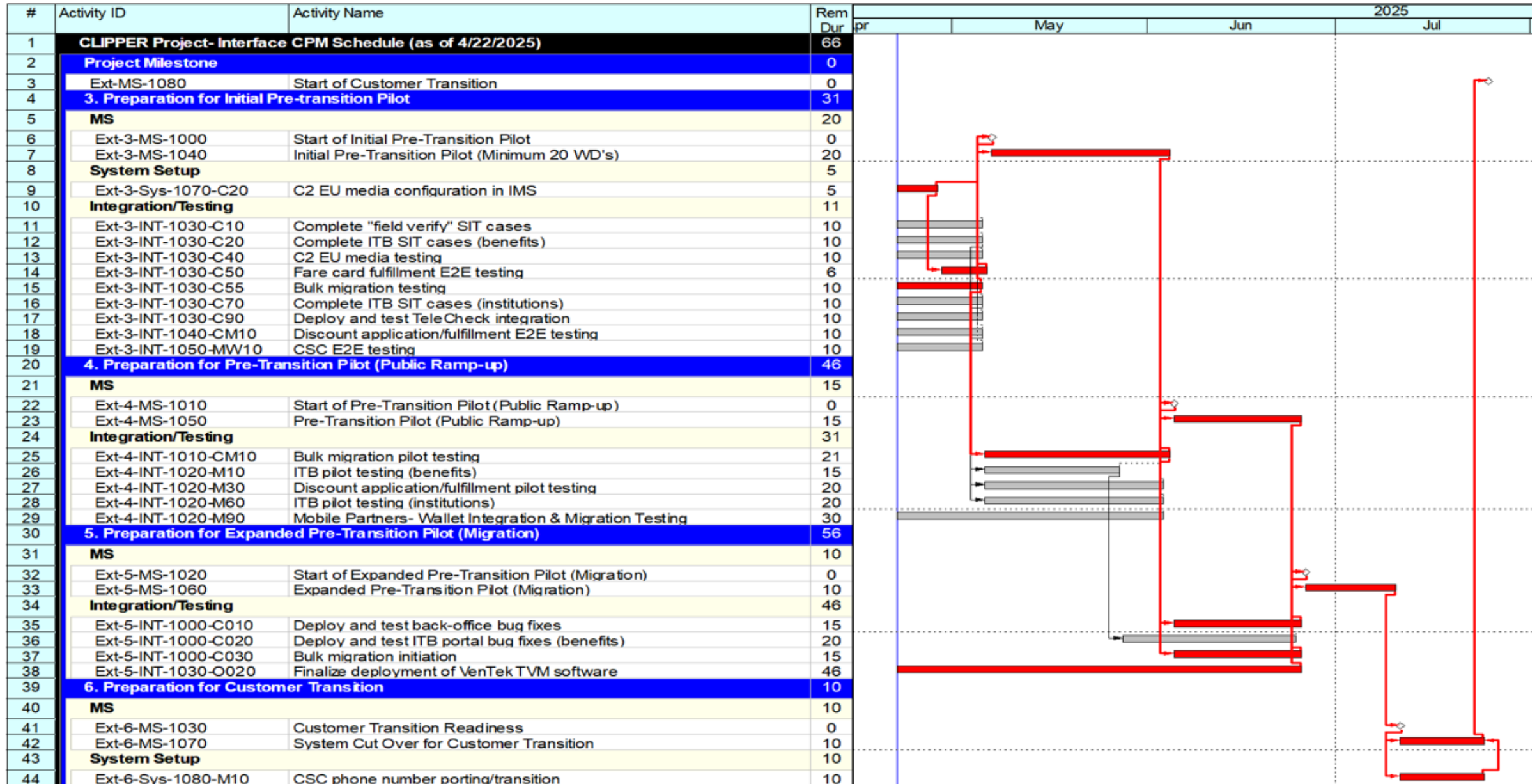
Remaining Risks to Schedule

- ~~Completion of the dry-run phase of lab testing~~
- ~~System Integration Testing finalization~~
- ~~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~~
-  Removed since last CEB

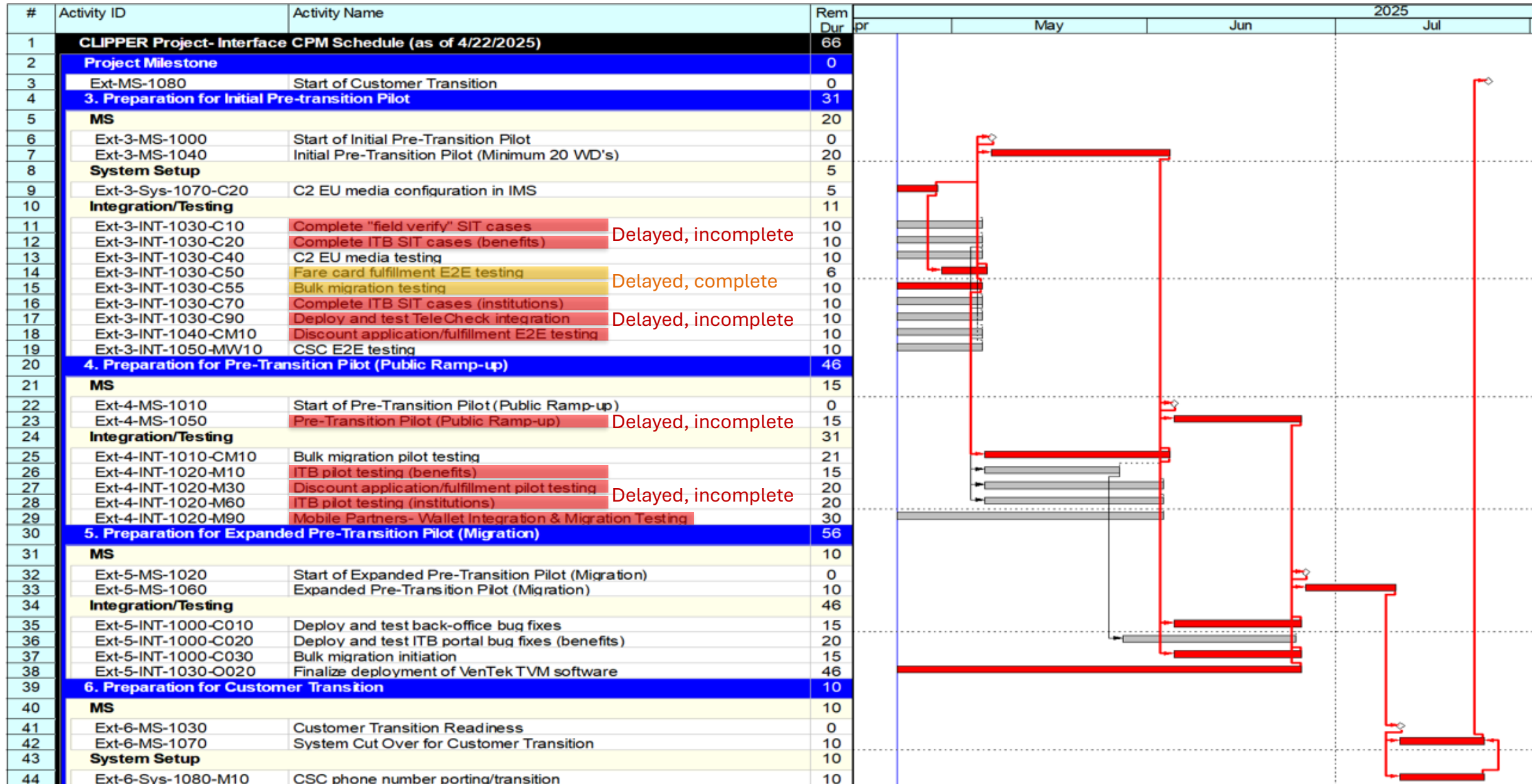
Testing & Pilot Activities

- All SFMTA faregates have next-generation Clipper readers installed, and are fully integrated with the new system
- BART has received sufficient inventory to complete all next-generation Clipper reader installations in their faregates, and faregate retrofits are nearly complete system-wide
- Updates to key training materials have been resubmitted to MTC for review, and training is progressing
- Account migration, card order fulfillment, and other critical workflows are being validated in production as part of the Pilot

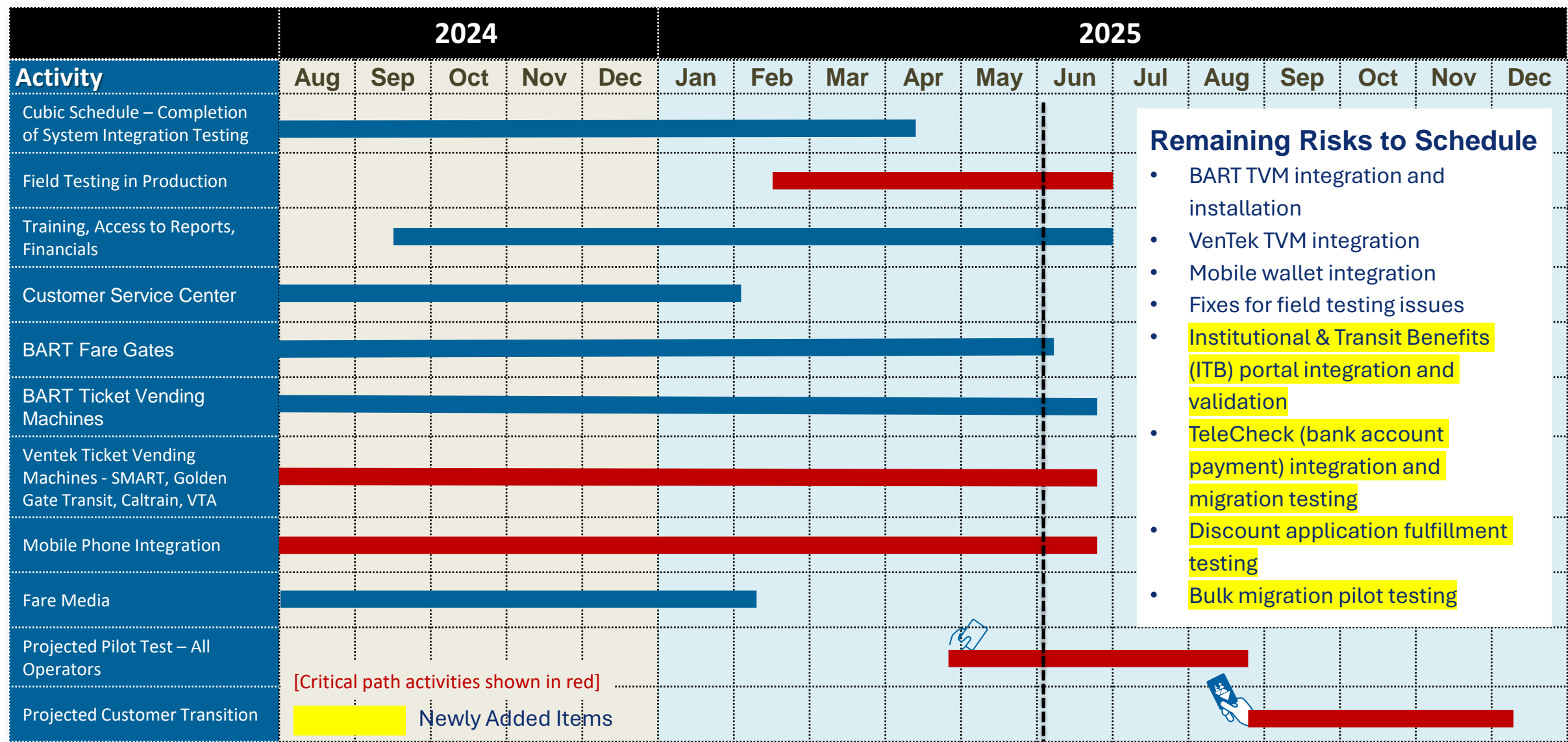
Critical Path with Additional Detail – from CEB on April 28, 2025



Critical Path with Additional Detail – from CEB on April 28, 2025



Schedule & Remaining Risks/Critical Activities – as of June 2, 2025



Critical Path with Additional Detail – as of June 2, 2025

