



Next-Generation
Clipper[®] System
Consultant Support

Pre-Proposal Meeting

October 8 , 2014

Agenda

1. Introductions
2. Procurement/RFP Overview
3. Project Overview
4. Questions



Introductions

MTC Staff:



Michele Gillaspie
Contracts Coordinator
Electronic Payments



Derek Toups, AICP
Project Manager
Clipper® System
Replacement



Doing Business with MTC

At this website you can:

- View contract opportunities
- Register as a user

<http://procurements.mtc.ca.gov/>



Basic Components of the RFP

- Due Dates/Procurement Timeline
- Contracts Coordinator/ Project Manager Contact Information
- Minimum Qualifications
- Scope of Work/Project Documents
- Form of Proposal
- General Contract Conditions and Forms
- Evaluation Criteria



Due Dates

- Due Dates are firm; absolutely no exceptions.
- There is a change to the due date for questions/requests for exceptions. This date is now Wednesday, October 15, at 4:00 PM. An addendum is forthcoming.
- Interview, award and approval dates are approximate and are subject to change before or after the closing date of the RFP.



Procurement Timeline

Activity	Date/Time
RFP Posted	9/30/2014
Proposers' Conference	10/8/2014 10AM, local time
Proposer questions and requests for modifications/exceptions due	10/15/2014 4PM, local time
Proposals Due	10/30/2014 4PM, local time
Proposer Interviews, if held	Week of 11/17/2014
Contract Award, anticipated	1/9/2015
Notice to Proceed	Estimated 3/1/2015



Questions?

All questions and requests for clarification or exceptions must be sent in writing via email to clipperprocurements@mtc.ca.gov no later than 4:00 p.m., on October 15, 2014.

Questions not submitted in writing will not be included in the Q&A portion of the Addendum.



MTC Staff Key Contacts

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Minimum Qualifications (MQs)

- Review MQ's carefully, if you do not demonstrate how your firm/team meets them your Proposal will not be considered.
- Be sure that your Proposal clearly provides the information necessary to determine your responsiveness to the MQs.
- Ask questions if you are unclear of how the MQs apply to your past experience, etc.



Scope of Work

- Review this section thoroughly, as you will be required to provide the services identified in this section.
- Proposers should address how they intend to deliver the services in their Proposal.
- Approach is an evaluation criteria for this procurement.



Project Documents

- Documents available on Box

The screenshot displays the Box web interface for the Metropolitan Transportation Commission. The top navigation bar includes the MTC logo, a search bar labeled 'Search Files', and icons for chat, globe, folder, users, and cloud. Below the navigation bar, the current folder is identified as 'Clipper® RFP Document Repos...'. The main content area features a list of documents:

- External Inputs**: Updated Oct 3, 2014 by Michele Gillaspie (4 views). Includes customers, general public, and peer agencies.
- Existing System Description**: Updated Oct 3, 2014 by Derek Toups (4 views).
- Fare Coordination**: Updated Oct 3, 2014 by Derek Toups (7 views).
- Weekly Clipper Operations Dashboard Reports**: Updated Oct 3, 2014 by Derek Toups (10 views).
- Planning Process and Goals**: Updated Oct 3, 2014 by Derek Toups (5 views). Link disables on Nov 1, 2014. Includes Mission/Vision/Goals and Objectives.
- Concept of Operations**: Updated Oct 2, 2014 by Derek Toups (5 views). Includes high-level user needs and functional system requirements.
- Monthly Clipper Program Updates**: Created Oct 2, 2014 by Derek Toups (10 views).

Form of Proposal

- Use this section of the RFP as your checklist for what to include in your Proposal.
- Check your Proposal before submitting it, to ensure all required information is included.
- Carefully comply with all instructions.
- Grammar, punctuation, etc. is important, as your Proposal may be evaluated on its clarity; written communication is an evaluation criteria for this procurement.



General Conditions

- Conflict of Interest
- Insurance Requirements
- Federal Requirements, including DBE, Title VI, etc.
- Due date for receipt of requests for modifications/exceptions to standard contract terms is 4:00 PM on Wednesday, October 15.
- Requests for clarification or exceptions submitted after the due date will not be accepted/considered, including requests to change insurance, bonding, etc.



Budget Worksheets

- RFP Appendix B, Cost Estimate Worksheets
- Three components:
 - Rate Breakdown
 - Staffing Plan Worksheet
 - One EA-Summary



Evaluation Procedures

- This section informs you on how your Proposal will be evaluated.
- Use this section to help inform you on what information to emphasize in your Proposal.
- Proposals that lack detail will not score well. Content and completeness are most important.



Evaluation Criteria

Evaluation Factor	Summary Explanation	Possible Points
1. Project Approach	Approach to the Scope of Work, as listed and described in Appendix A. <u>Scope of Work</u> .	35
2. Proposer Firm/ Team Experience	Proposer firm/team experience, in relation to the expertise sought by MTC; this may include information gathered by MTC through references.	20
3. Staff Qualifications	Including depth and commitment of resources proposed to be assigned to the Project..	20
4. Cost	Cost effectiveness.	15
5. Written and Oral Communications	As evidenced from the submitted proposal and through oral interviews (if held).	10
Total Possible Points		100



Bay Area Transit Environment

- **9 counties**
- **1.5 million daily transit trips**
- **More than 20 transit systems**
 - Multimodal: bus, ferry, light rail, commuter rail, heavy rail
- **No system carries >50% of riders**
 - Muni carries ~45% of all riders
- **Diverse fare programs**
 - Flat fare
 - Distanced-based
 - Zone-based
 - Various transfer rules and agreements
- **Legislative mandate to coordinate services (SB 1474)**



Clipper® provides seamless travel



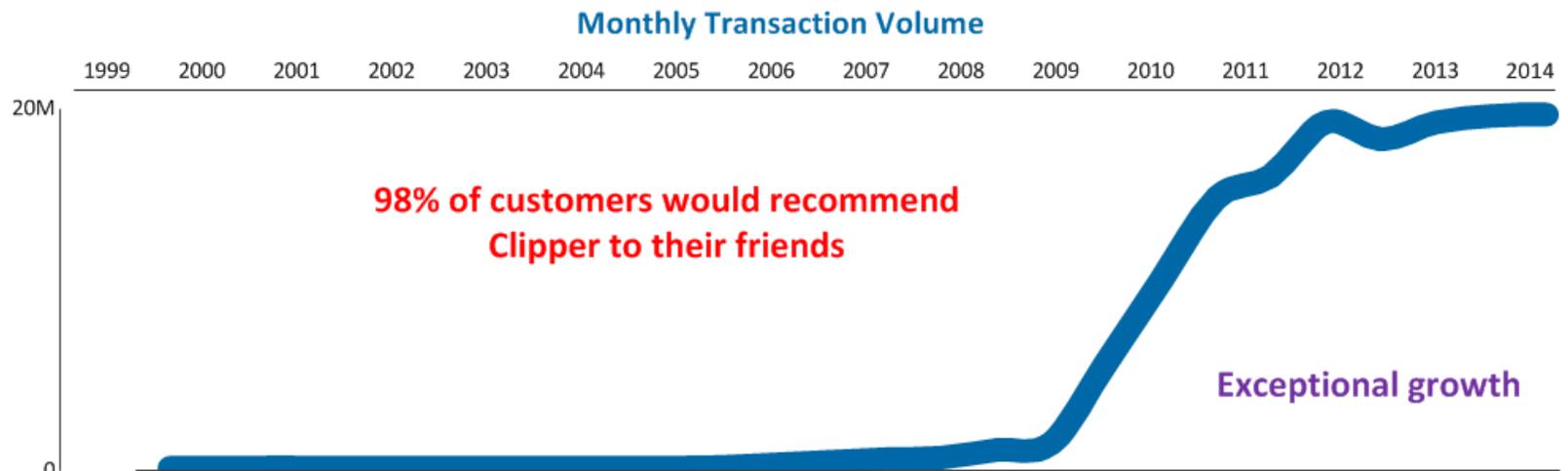
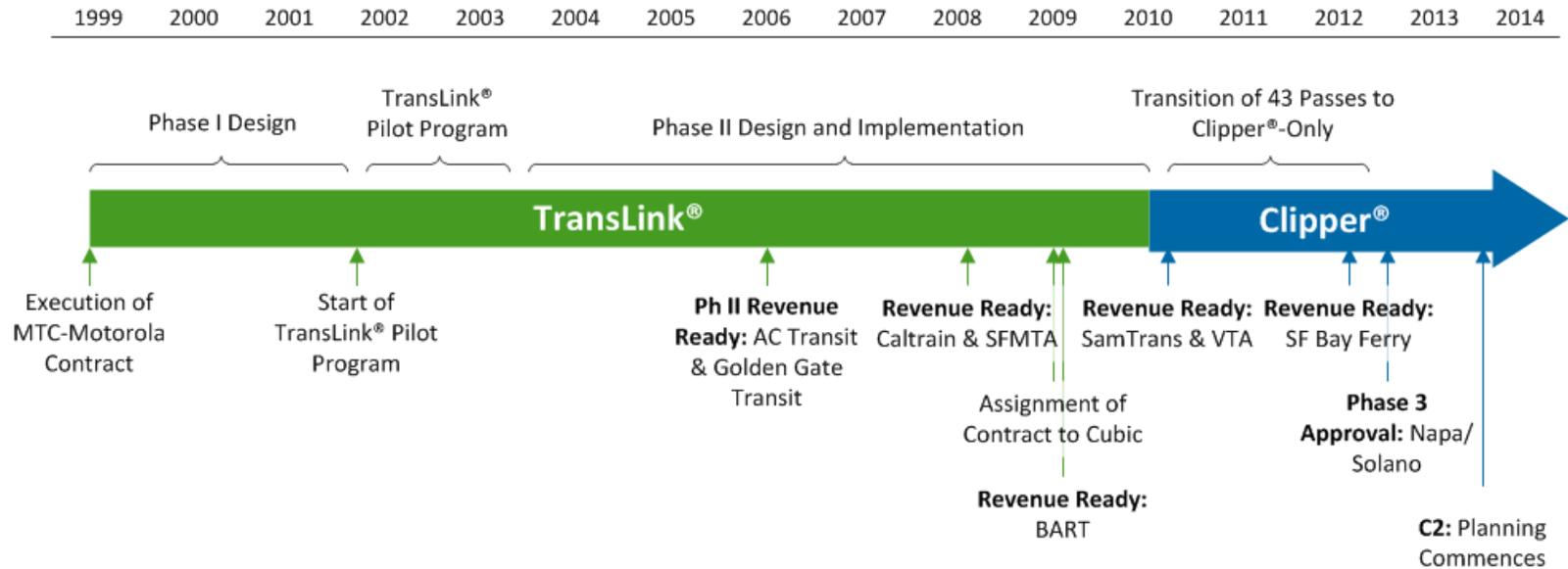
- **Clipper available on eight largest Bay Area transit systems:**
 - Available to 95 percent of all riders
 - 1.4 million active cards
 - Processing \$35M/month
- **Expansion underway:**
 - Napa/Solano bus operators next month
 - East Bay suburban bus operators late 2015
 - Sonoma County bus operators and Sonoma Marin Rail Authority by 2016



Clipper[®] Expansion: Phase 3 Operators



Clipper® Program History



Clipper® Operating Details



Payment configurations

- Flat fare
- Distance-based
- Zone-based

Fare policy

- Four fare categories: adult, senior, youth, disabled
- 4,000 unique fares
- 12,000 recognized transfer combinations
- 100 agency fare products
- Cards cost \$3
- Two agencies currently use limited use tickets (SF Muni and GG Ferry)

More than 350 retailers

Daily financial settlement

Maximizing the System

- **46 passes/tickets converted to Clipper-only availability**
- **Integrations with legacy systems**
 - BART fare gates
 - Existing ticket machines
- **Incorporate into new systems**
 - New ticket machines
 - BART Oakland Airport Connector
- **Non-transit initiatives**
 - Parking payment at 5 garages in San Francisco

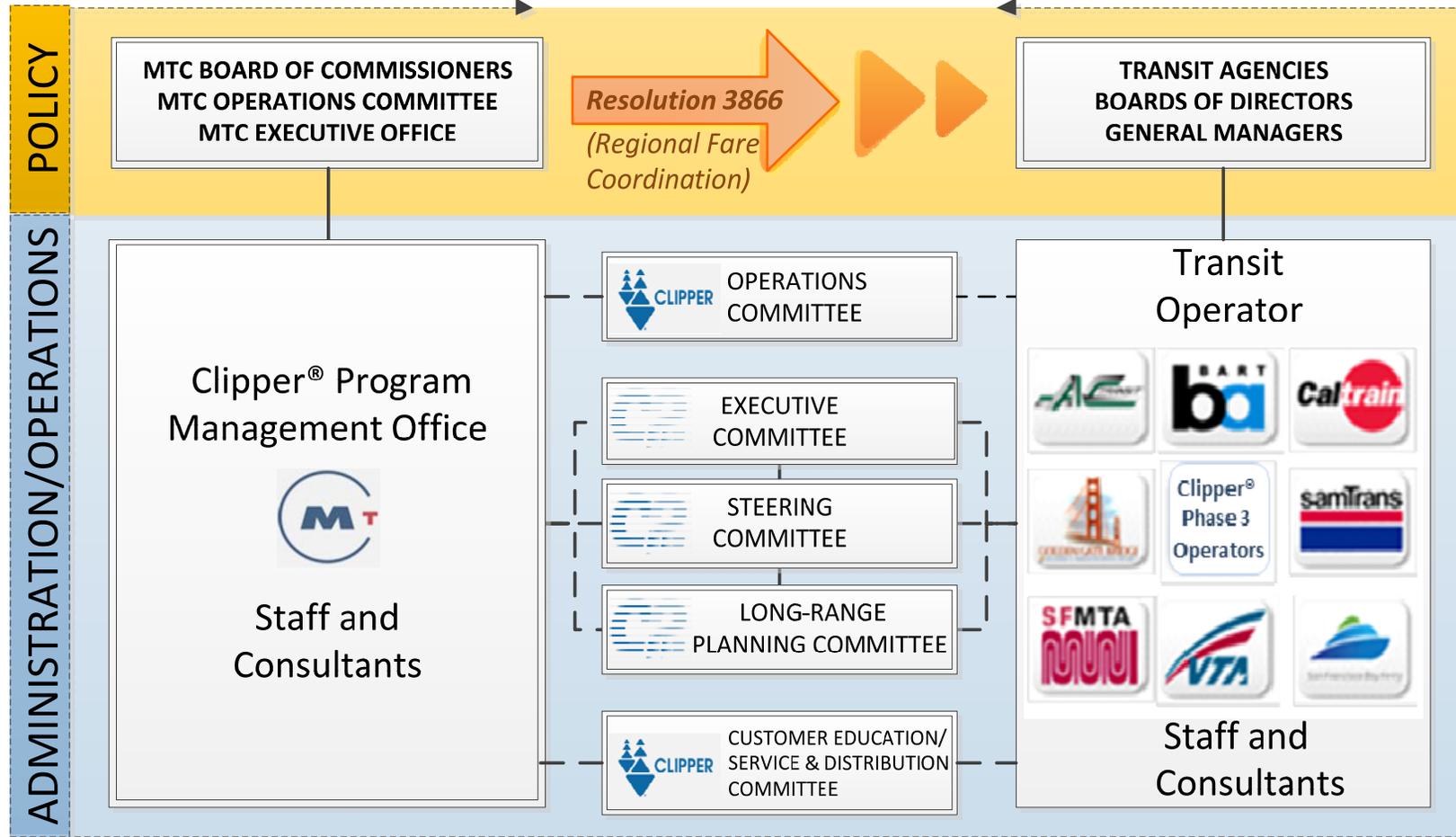


Planning for the Next Generation System

- Current Contract ends in November 2019
- System limitations
 - System architecture is from the late 90s
 - Device components approaching end-of-life
 - Complex regional policies limit flexibility
 - Layering in new technologies to integrate with the existing Clipper® system would likely be expensive and risky
- Preparing for new procurement
 - Executive, Steering and Long-Range Committees meeting regularly
 - Work on vision for new system, concept of operations, and fare simplification underway



Project Framework



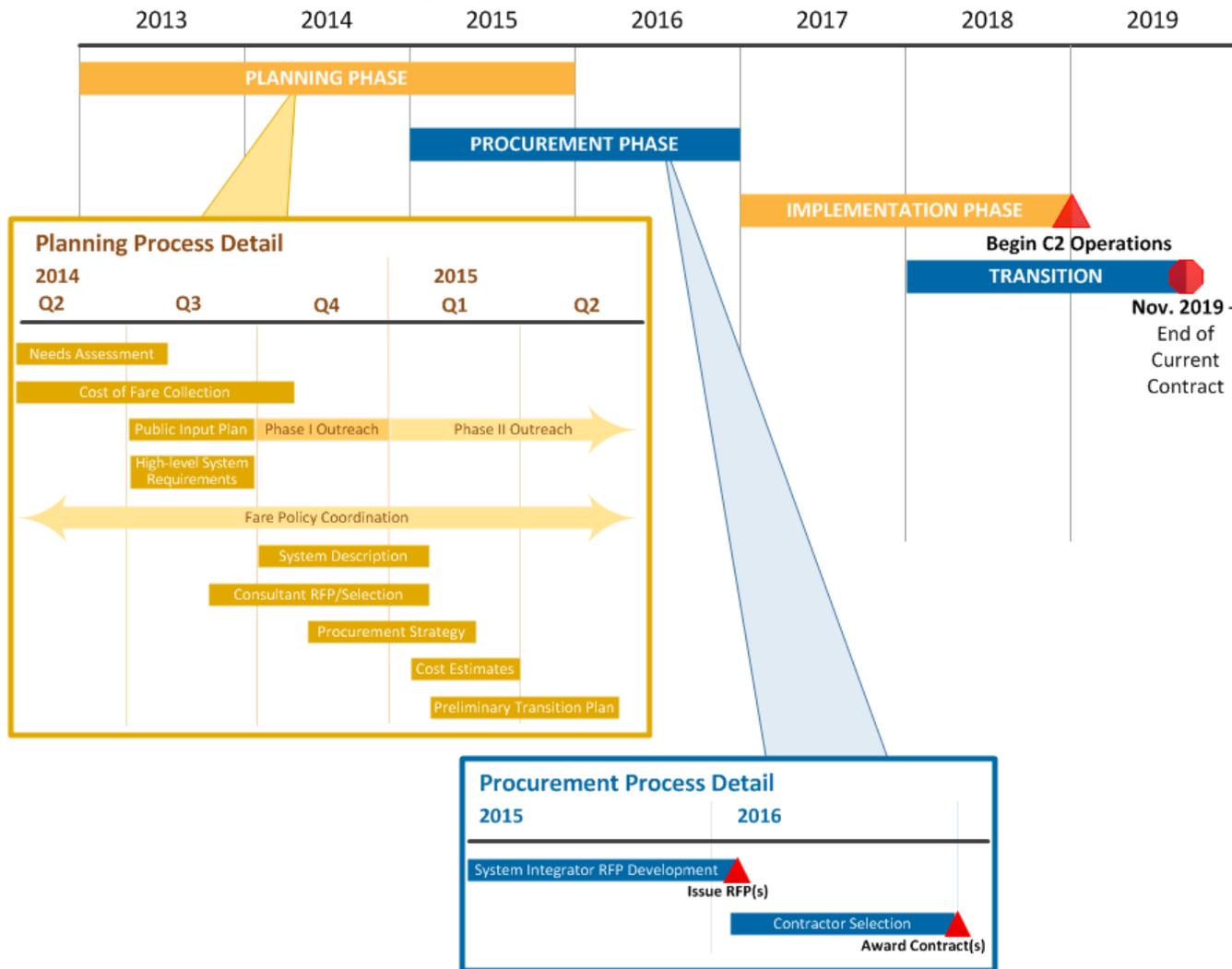
Project Status

Description	Responsible	Lead	Status	Target Completion
Complete				
Vision/Mission	Executive Committee	n/a	Approved by Executive Committee on September 23, 2013	September 2013
Goals and Objectives	Steering Committee	n/a	Approved by Executive Committee on June 23, 2014	June 2014
Needs Assessment	Design Working Group	n/a	Approved by Design Working Group on July 21, 2014	July 2014
Public Input Plan	Public Input Subcommittee	n/a	Item approved by Executive Committee on Sept. 22, 2014	September 2014
High-level System Requirements (i.e., Design Summary)	Design Working Group	n/a	Design Summary was finalized on September 24, 2014	September 2014
Cost of Fare Collection	Steering Committee	n/a	Item scheduled for approval by Executive Committee	October 2014
In Progress				
Fare Policy Coordination	Fare Policy Subcommittee	R. Haskin	Common Youth age criteria and inter-operator transfer guidelines approved by Exec. Cmte. on April 23, 2014. Transfer and accumulator analyses under development.	Ongoing
System Description (i.e., ConOps)	Steering Committee	CH2MHill	Scheduled for discussion at Nov. 7, 2014 Steering Cmte.	January 2015
Consultant RFP	Selection Committee	D. Toups	RFP was advertised on September 30, 2014	January 2015
Upcoming				
Procurement Strategy	Steering Committee	CH2MHill	Begins Fall 2014, will be drafted in parallel with Con Ops	February 2015
Initial Cost Estimates	Steering Committee	CH2MHill	ROM costs will be based on Con Ops and Procurement plan	March 2015
Preliminary Transition Plan	Steering Committee	CH2MHill	Begins following approval of Con Ops	May 2015



 = Complete
 = At Risk
 = On Track
 = Delayed
 = Not Started

Project Phasing



Scope of Work

1. ADMINISTRATIVE SUPPORT

- Admin/PM
- Project controls
- Strategy
- Coordination
- Regulatory

3. IMPLEMENTATION SUPPORT

- Contractor oversight
 - Design
 - Software development
 - Assembly
 - Installation
 - Integration
 - Testing
 - Financial controls
 - Contract changes
- QA/QC
- Transition Support
 - Contract/Policy changes
 - Transition support

2. PROCUREMENT SUPPORT

- Requirements/specifications
- Legal, performance provisions
- Funding strategy, cost estimates
- Strategy, risk assessment
- Procurement, evaluation support

4. OPERATIONS SUPPORT (optional)

- Operating rules/procedures
- Training support to operators
- Finance/reconciliation support
- Performance assessment
- System audits
- Change control

5. OTHER SUPPORT AS NEEDED

- Public involvement/outreach
- System expansion
 - Parking
 - Bikeshare or other shared services



Q&A

- Remember that in order for questions to be addressed in any addenda, they must be submitted in writing to clipperprocurements@mtc.ca.gov no later than next Wednesday at 4:00 PM.

