

Clipper[®] Executive Board

January 22, 2024

Agenda Item 4a

Clipper[®] Schedule, Implementation, and Deployment Update

Subject:

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

Background:

Next Generation Project Schedule

Our current schedule (see top of Attachment A) shows the work remaining in two workstreams:

- Equipment Installation, and
- Account-based System Implementation, which consists of System Testing (shown in light-blue, as this is non-customer facing), a pre-Transition pilot test that will include public participants, and concluding with the transition of all customers to the new Account-based system.

Cubic Transportation System's (Cubic) schedule submitted in December is consistent with Attachment A. MTC has approved the submitted schedule and directed Cubic to proceed according to that schedule pending execution of a future Change Order to true up the milestone dates in the contract. Based on our assessment of the remaining work, we are projecting that on-board equipment installation will be complete in early 2024 and that Customer Transition will start in late summer 2024. This date has moved slightly but is consistent with what has been reported as starting in summer 2024, and is when we expect to have the new Clipper back-office system fully operational, all new equipment installed across 22 transit agencies in the Bay Area, and ancillary equipment such as handheld fare inspection devices and retail sales devices ready for operations. MTC is currently reviewing Cubic's January schedule submittal and is evaluating the other workstreams for discussion in February.

Next Generation Schedule Risk

Risk assessment, mitigation and management are critical to project success. The project team reviews the risks to C2 each month and staff will list the top/key risks based on our current assessment in this section each month to keep the Board apprised:

- Completion of all of business rules updates to support the Fare Integration Task Force modifications allowing for end-to-end testing of the entire system with all new transfer rules prior to Customer Transition.
- Completion of all hardware installation at all locations, including installation projects by transit operators (e.g., BART network deployment and new fare gate procurement).
- Coordination of the various project components and the timing to “land on a dime” with multiple contractors for the various parts of the system. (e.g., working with the customer service contractor, fare media suppliers, and transit agency vendors for components such as ticket machines and computer-aided dispatch / automatic vehicle location (CAD/AVL) systems, as well as training transit agency staff.)

These risks, if realized, have the potential to impact the planned late summer 2024 transition date. The current schedule has very limited float and assumes all the required work to make the transition possible “goes right.” In addition to day-to-day staff meetings to maintain the schedule and manage risks, executives from MTC, CEB leadership, and Cubic are in close communication to trouble-shoot risk areas. Staff will continue to closely monitor the schedule and provide monthly updates to this Board.

Next Generation Implementation

Included as Attachment A to this memorandum is a summary of recently completed activities related to delivering C2, upcoming activities and deliverables for MTC, Cubic Transportation Systems, and the transit operators, and other noteworthy items managed by the project team.

Next Generation Deployment

Clipper reader installations at rail and ferry stations are complete at AC Transit, Caltrain, Golden Gate Ferry, Sonoma-Marín Area Rail Transit (SMART), Santa Clara Valley Transportation Authority (VTA), and San Francisco Bay Area Water Emergency Transportation Authority

(WETA); installation for San Francisco Municipal Transportation Agency's (SFMTA) (4 stand-alone validators) is expected to be completed in the near future. Onboard Clipper reader installations are completed at Santa Rosa CityBus, Petaluma Transit, Livermore/Amador Valley Transit Authority (LAVTA), SamTrans, VTA, County Connection, FAST, Sonoma County, TriDelta, Union City, Napa, Marin Transit with a handful of buses remaining to be installed at SolTrans and Vacaville. Fleet installation is continuing at AC Transit (45% complete) and SFMTA (99% complete) with WestCAT expected to begin in the near future. Clipper retail sales devices are being replaced with their Next Generation counterparts at Bay Area Walgreens, Whole Foods, and local retailers and is expected to be complete regionally in ~April 2024. Included as Attachment B to this memorandum is a presentation showing recent pictures of Next Generation Clipper device installations.

Issues:

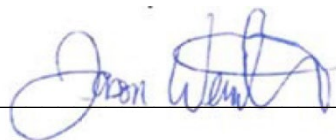
None identified.

Recommendations:

Information

Attachments:

- Attachment A: Next Generation Clipper Program Executive Summary Status Report
- Attachment B: Clipper Next Generation Equipment Installation Pictures



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