



METROPOLITAN  
TRANSPORTATION  
COMMISSION

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## *Memorandum*

TO: Operations Committee

DATE: July 3, 2008

FR: Deputy Executive Director, Policy

W.I.: 310-2707 and 105-1221

RE: TransLink<sup>®</sup> Program

- f) Funding Agreement – BART/TransLink<sup>®</sup> Cycle Test: BART (\$200,000)
- g) Contract Amendment – TransLink<sup>®</sup> Distribution and Communications Planning and Support Services: Synapse Strategies (\$50,000)

### **Background**

TransLink<sup>®</sup> is the Bay Area's regional transit fare payment system. When fully implemented, Bay Area transit riders will be able use a reloadable TransLink<sup>®</sup> smart card to ride every transit system in the nine-county San Francisco Bay Area. The first phase of the region wide deployment, which was completed in November 2006, includes all AC Transit and Golden Gate Transit and Ferry routes. The second phase of the deployment includes BART, Caltrain, and San Francisco Muni; the system is expected to achieve revenue ready status for operation on Caltrain and San Francisco Muni this summer and revenue ready status for operation on BART this fall. Additional deployment phases, scheduled through 2010, will bring TransLink<sup>®</sup> to the remaining Bay Area transit systems. The TransLink<sup>®</sup> system is currently recording about 15,000 transactions on a typical weekday.

### **f) Funding Agreement – BART/TransLink<sup>®</sup> Cycle Test: BART (\$200,000)**

As part of the BART TransLink<sup>®</sup> faregate integration project, BART requires that a stress test, or Revenue Cycle Test, of the TransLink<sup>®</sup> system be conducted prior to the system's receiving revenue ready certification. This test will be performed by BART following the TransLink<sup>®</sup> Contractor's completion of field-testing and will involve generating approximately 800,000 entry/exit transactions with TransLink<sup>®</sup> cards at BART's faregates over the course of two to three weeks, and then sending the transactions through the TransLink<sup>®</sup> system for settlement processing. BART requested funding to cover subcontractor costs of generating the 800,000 transactions for the test. The TransLink<sup>®</sup> Management Group approved funding in the amount of \$198,200. It is MTC's intention that this test be a revenue ready requirement; however, as TransLink<sup>®</sup> Contract Manager, MTC reserves the right to determine the appropriate standard by which the test results will be evaluated and to make the final determination as to when Revenue Ready status is achieved.

**g) Contract Amendment – TransLink® Distribution and Communications Planning and Support Services: Synapse Strategies (\$50,000)**

In April 2007, this Committee approved Synapse Strategies as one of the “on-call” consultants for the TransLink® Consultant Assistance Program. This Committee approved a contract in the amount of \$105,000 for TransLink® distribution and communications planning (July 2007), and approved an amendment (May 2008) in the amount of \$143,000 to extend the contract through June 2009.

This proposed contract amendment will provide an additional \$50,000 for the following tasks through June 2009:

1. Staff the “TransLink® for Transit Oriented Development (TOD)” program by planning and implementing outreach events, coordinating the participation of sponsor agencies at events, providing customer service support and ensuring quality control in card distribution; and
2. Implement an outreach program to expand marketing efforts through community organizations, partners, and others by developing a contact database, and implementing and monitoring outreach activities.

**Recommendation**

Staff recommends that the Operations Committee authorize the Executive Director to negotiate and enter into a funding agreement with BART for a Revenue Cycle Test, in an amount not to exceed \$200,000; and to negotiate and enter into a contract amendment with Synapse Strategies, for the TransLink® for TOD program and other outreach activities, in an amount not to exceed \$50,000.

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Therese W. McMillan

TM/BG

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement

Work Item No.: 310-2707

Agency: Bay Area Rapid Transit District (BART)  
Oakland, California

Project Title: BART/TransLink® Cycle Test

Purpose of Project: Perform BART/TransLink® Cycle Test

Brief Scope of Work: Perform a stress test, or revenue cycle test, by generating approximately 800,000 TransLink® transactions at BART's faregates and confirm proper processing by the TransLink® system.

Project Cost Not to Exceed: \$200,000.

Funding Source: CMAQ, STP Exchange

Fiscal Impact: Funding to come from state and federal funds previously programmed for the TransLink® program and included in TransLink® capital budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a funding agreement as described herein, and the Chief Financial Officer is authorized to set aside funds up to \$200,000 for such a funding agreement.

Operations Committee:

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Sue Lempert, Chair

Approved: Date: July 11, 2008

## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Contract Amendment

Work Item No.: 105-1221

Consultant: Synapse Strategies  
Oakland, California

Work Project Title: TransLink<sup>®</sup> Distribution and Communications Planning and Support Services

Purpose of Project: Oversee completion of tasks related to the regionwide implementation of TransLink<sup>®</sup>

Brief Scope of Work: Planning and support services related both to the distribution of TransLink<sup>®</sup> cards and value and to TransLink<sup>®</sup> marketing and communications initiatives, specifically the transit-oriented development pilot program and TransLink<sup>®</sup> community outreach

Project Cost Not to Exceed: \$50,000 (current contract = \$248,000)

Funding Sources: RM-2 Operating

Fiscal Impact: Funding to come from previously programmed regional funds for the TransLink<sup>®</sup> program.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Synapse Strategies and the Chief Financial Officer is authorized to set aside funds up to \$50,000 for such a contract amendment.

Operations Committee:

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Sue Lempert, Chair

Approved: Date: July 11, 2008