



METROPOLITAN  
TRANSPORTATION  
COMMISSION

Joseph P. Bort MetroCenter  
101 Eighth Street  
Oakland, CA 94607-4700  
TEL 510.817.5700  
TDD/TTY 510.817.5769  
FAX 510.817.5848  
E-MAIL [info@mtc.ca.gov](mailto:info@mtc.ca.gov)  
WEB [www.mtc.ca.gov](http://www.mtc.ca.gov)

## *Memorandum*

TO: Operations Committee

DATE: May 3, 2013

FR: Executive Director

W.I.: 320-1221, 320-2700

RE: Consultant Panel and Contract: Electronic Payment Implementation and Operations

i) Panel Selection for FY 2013-14 through 2015-16

- Acumen Building Enterprise, Inc.
- Atkins North America, Inc.
- Auriga Corporation
- Daniel Bols
- Cambria Solutions, Inc.
- CH2MHill/Jacobs Engineering
- Clear2Pay, Americas
- Four Nines Technologies
- Invoke Technologies
- Kimley-Horn and Associates
- LTK Engineering Services
- Lumenor Consulting Group
- Parsons Brinkerhoff, Inc.
- Stantec Consulting Services, Inc.
- Synapse Strategies/Resource Development Associates
- Traffic Technologies, Inc.
- Alan Richard Zahradnik

ii) Contract – Distribution and Communications Planning and Support Services: Synapse Strategies (\$350,000)

This memorandum requests approval of (1) the above-listed pre-qualified panel of consultants to provide on-call assistance to support the Clipper<sup>®</sup> and FasTrak<sup>®</sup> programs for a three year period ending June 30, 2016; and (2) a contract with Synapse Strategies, a member of the requested panel, to provide distribution and communication planning and support services to the Clipper<sup>®</sup> program.

**i) Panel Selection for FY 2013-14 through 2015-16**

### **Background**

In April 2007, MTC issued a Request for Qualifications (RFQ) to create a panel of consultants to provide on-call assistance to the TransLink<sup>®</sup> (renamed Clipper<sup>®</sup>) project. As a result of the RFQ, MTC entered into a number of contracts with the approved providers for support across multiple areas of expertise including project and implementation management, strategic analysis, customer service, marketing and market research. Upon expiration of the resulting contracts,

MTC issued a second RFQ that resulted in a new bench of consultant providers, approved by this Committee in July 2010, which expires on June 30, 2013.

### **Procurement Process**

On February 26, 2013, MTC issued a new RFQ to continue on-call consultant assistance services for implementation and operation of Clipper<sup>®</sup> and FasTrak<sup>®</sup> in four service categories: A. Program management; B. Strategic planning; C. Operational monitoring and reporting; and D. Technology evaluation and support. MTC structured this RFQ to allow the FasTrak<sup>®</sup> program to use the bench consultants in order to achieve programmatic objectives.

A panel consisting of staff from MTC and the San Francisco Municipal Transportation Agency (SFMTA) evaluated the qualifications using the following criteria: (1) Experience and qualifications of the firm and proposed staff in relation to the expertise sought by MTC; (2) Depth of staff resources; (3) Price; and (4) References. 20 firms submitted Statements of Qualifications (SOQs) in response to the RFQ. All 20 respondents were deemed to have met the minimum qualifications, but three (Adam Cohen, Cyberwatch, and A2W) were deemed to be not as competitive as the others in the specified evaluation criteria.

### **Recommendation**

Staff recommends that this Committee approve a pre-qualified consultant panel comprised of the consultants listed above and shown in Attachment 1 to the Committee approval form associated with this memorandum to provide services for Clipper<sup>®</sup> and FasTrak<sup>®</sup> on an as-needed basis for a period through June 30, 2016. Subject to the availability of funding, MTC will enter into individual contracts for services with specific firms based on the best match between programmatic needs and each firm's strengths. Contracts in excess of the Executive Director's delegated signature authority will return to this Committee for review and approval.

#### **ii) Contract – Clipper<sup>®</sup> Distribution and Communications Planning and Support Services: Synapse Strategies (\$350,000)**

Synapse Strategies (Synapse) is one of the firms staff recommends for qualification by the Committee under item (i) above. This Committee previously approved Synapse as part of the Clipper<sup>®</sup> Consultant Assistance Program in July 2010, and MTC executed a contract with Synapse in 2011 that expires on June 30, 2013. Under the new contract, Synapse would provide the following services: project management of customer education initiatives related to Clipper<sup>®</sup> system expansion and system changes and increasing Clipper<sup>®</sup> adoption; coordination of customer education targeting low-income, youth, senior, and limited-English proficiency customers; oversight and coordination of in-person customer outreach; and assistance facilitating meetings and operational reporting.

Staff recommends that this Committee authorize the Executive Director or his designee to negotiate and enter into a contract with Synapse in an amount not to exceed \$350,000 for services through June 30, 2014, subject to Commission approval of the FY 2013-14 agency budget.

  
Steve Heminger

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## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Consultant Panel

Work Item No.: 320-1221, 320-2700

Consultant Bench: See Attachment

Project Title: Electronic Payment Implementation and Operation  
Consultant Assistance Bench Procurement for FY 2013-14  
through 2015-16

Purpose of Project: Establish the attached list of pre-qualified vendors for on-call support services

Project Cost Not to Exceed: N/A

Funding Source: N/A

Fiscal Impact: None

Motion by Committee: That the attached list be pre-qualified to enter into contracts with MTC to provide on-call support services for the Clipper<sup>®</sup> and FasTrak<sup>®</sup> Programs on an as-needed basis through June 30, 2016, subject to applicable contract approval procedures and necessary budget approvals, as described above and in the Executive Director's memorandum dated May 3, 2013.

Operations Committee:

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Jake Mackenzie, Chair

Approved: Date: May 10, 2013

**Attachment 1**  
**Clipper® Consultant Assistance Panel**

**List of Firms and Service Categories**

	<i>Service Categories</i>			
	<b>A. Program Management</b>	<b>B. Planning</b>	<b>C. Operational Monitoring</b>	<b>D. Technical Evaluation</b>
Acumen Building Enterprise, Inc.	X	X	X	X
Atkins North America, Inc.	X	X	X	X
Auriga Corporation	X	X	X	X
Daniel Bols	X			
Cambria Solutions, Inc.	X	X	X	X
CH2M Hill/Jacobs Engineering	X	X	X	X
Clear2Pay, Americas	X	X	X	X
Four Nines Technologies		X	X	X
Invoke Technologies	X	X	X	X
Kimley-Horn and Associates, Inc.	X	X	X	X
LTK Engineering Services	X	X	X	X
Lumenor Consulting Group	X	X	X	X
Parsons Brinkerhoff, Inc.	X	X	X	X
Stantec Consulting Services, Inc.		X		
Synapse Strategies/Resource Development Associates	X	X	X	
Traffic Technologies, Inc.	X	X	X	X
Alan Richard Zahradnik		X		

## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Contract

Work Item No.: 320-1221

Contractor: Synapse Strategies  
Oakland, CA

Project Title: Distribution and Communications Planning and Support Services

Purpose of Project: Provide oversight and support for customer education, distribution and customer service functions

Brief Scope of Work: Oversee in-person customer education/outreach services; planning and support services related to Clipper<sup>®</sup> marketing and communication and customer service initiatives through FY 2013-14.

Project Cost Not to Exceed: \$350,000

Funding Source: Regional Measure 2 Marketing and Regional Measure 2 Operating

Fiscal Impact: Funds dependent on the approval of Regional Measure 2 Marketing and Operating funds in the FY 2013-14 agency budget.

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract with Synapse Strategies for the purposes described herein and in the Executive Director's memorandum dated May 3, 2013, and the Chief Financial Officer is authorized to set aside funds up to \$350,000 for such contract, subject to the FY 2013-14 agency budget approval process.

Operations Committee:

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Jake Mackenzie, Chair

Approved: Date: May 10, 2013