



METROPOLITAN
TRANSPORTATION
COMMISSION

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700
Tel: 510.464.7700
TDD/TTY: 510.464.7769
Fax: 510.464.7848

Memorandum

Agenda Item 2b

TO: Operations Committee

DATE: January 2, 2015

FR: Executive Director

W.I. 310-2700, 320-1221

RE: Contract Amendment – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$30,000)

Attachment 1 includes information about current Clipper® system operations.

Contract Amendment – Clipper® Customer Education/Outreach Services: Caribou Public Relations (\$30,000)

This Committee approved Caribou Public Relations (Caribou) as part of the On-Call Consultant Assistance for the Operational Programs Customer Information Services bench in July 2014. MTC subsequently executed a contract under authority of the Executive Director in the amount of \$95,000 with Caribou to provide public outreach services, which expires in June 2015. Under the proposed amendment, MTC will add \$30,000 to the contract in order for Caribou to continue through the end of the fiscal year to provide general Clipper® education and communicate the benefits of Clipper® to Bay Area transit riders, including Title VI protected customers.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Caribou in an amount not to exceed \$30,000 for the services described herein.

Steve Heminger

SH: JW:bg

J:\COMMITTEE\Operations\2015 Operations Comm Packet\01_Ops_Jan_2015\2b Clipper Contract Actions - January.docx

Table 1: Summary of System Usage

	Last Month November 2014	Prior Month October 2014	Prior Year November 2013
Transaction Volume			
Average Weekday Ridership ¹	768,542	784,065	708,783
Fee-Generating Transactions ^{2,3}	18,723,965	22,354,963	17,862,107
Unique Cards Used	782,859	810,300	697,888
Active Card Accounts	1,534,627	1,514,518	1,337,561
Settled Transit Operator Revenue	\$38,143,478	\$44,159,825	\$33,884,792
Autoload Activity			
Percent of Registered Cards with Autoload	36%	36%	37%
Call Volume			
Customer Service Representative (CSR) Calls	23,948	29,687	26,442
CSR Calls per Unique Card Used	0.03	0.04	0.04
Website Traffic			
Unique Visitors - Standard	131,844	143,423	122,285
Unique Visitors - Mobile	38,642	39,590	22,935
Website Visits - Standard	180,632	202,719	171,100
Website Visits - Mobile	62,143	66,452	37,297
Website Visits per Unique Card Used	0.25	0.33	0.30

Notes on System Usage:

Between October and November, average weekday ridership declined 2 percent. Fee-generating transactions dropped below the contract benchmark to 18.7 million, a decline of 16.2 percent. October had 23 business days (22 if Columbus Day is taken out), and November had 17 business days (the month started on a Saturday and contained three holidays—Veterans Day, Thanksgiving Day and the day after Thanksgiving).

Unique cards used dropped 3.4 percent, and active card accounts increased 1.3 percent. Settled transit operator revenue declined 13.6 percent. Calls to Customer Service dropped 19.3 percent. Unique visitors and total visits to the desktop site decreased 8.1 percent and 10.9 percent, respectively. Unique visitors and total visits to the mobile site dropped 2.4 percent and 6.5 percent, respectively. Website visits per unique card used dropped 24.2 percent.

¹ Includes average daily number of boardings, including transfers but excluding some Caltrain monthly pass trips (Caltrain only requires monthly pass customers to tag their cards once at the beginning of each month).

² Includes single-tag fare payments, BART and Caltrain exits, Golden Gate Transit entries, add-value transactions, opt-out purse refunds and pass use, including institutional passes. Does not include transfers or transactions where fee value is \$0 (e.g., issuance of free cards, zero-value tags in dual-tag systems, etc.).

³ Fee-generating transactions for October and November have been adjusted to reflect corrections to the TLF005 report. Errors were due to a bug in the DC/CID1B software version 9.2.9 release in late October that caused tags by customers with passes on their cards to be reported incorrectly to the Clipper back-end system. The bug was corrected in mid-November, but TLF005 will permanently underreport pass tags and over-report cash value tags for this affected period.

Table 2: Monthly Market Penetration Rates

	Monthly Clipper Boardings		Market Penetration Rate ⁴			
	October 2014	September 2014	October 2014	September 2014	August 2014	October 2013
AC Transit	1,936,981	1,782,983	37.0%	35.2%	31.6%	37.2%
BART ⁵	6,694,706	6,114,904	57.2%	57.1%	54.3%	55.3%
Caltrain ⁶	296,646	278,414	60.3%	55.9%	51.6%	54.6%
Golden Gate Ferry	211,232	190,885	97.2%	90.3%	88.2%	96.4%
Golden Gate Transit/Marin Transit	240,663	231,037	41.8%	40.8%	39.4%	39.1%
SamTrans	456,272	432,944	34.6%	34.4%	32.2%	35.4%
San Francisco Bay Ferry	59,213	51,492	28.5%	28.5%	24.5%	32.4%
SFMTA	9,424,048	8,959,370	48.0%	45.2%	45.9%	45.8%
VTA	1,485,735	1,341,744	45.9%	36.5%	34.1%	24.9%

⁴ MTC uses the National Transit Database (NTD) to calculate most market penetration rates. Although NTD typically has a two-month delay before ridership data are available, NTD was temporarily three months behind. NTD is now back on its regular schedule, so the table above includes the two most recent months for which data are available, September and October 2014. Napa-Solano ridership and market penetration will be reflected in the January 2015 report—these agencies did not begin accepting Clipper until November 2014.

⁵ Calculation of BART monthly market penetration is now calculated using monthly BART total exits by ticket type, which is equivalent to number of linked trips per month. Note that the November 2014 Clipper Update misreported the July 2014 market penetration rate as 51.5 percent; the correct figure was 55.2 percent.

⁶ Calculation of Caltrain market penetration assumes that monthly pass holders board Caltrain 1.75 times a day per weekday. Caltrain sold 15,221 calendar passes during the September 2014 pass vending window and 15,845 during the October 2014 pass vending window.

Summary of Proposed Contract Amendment

Work Item No.: 320-1221

Contractor: Caribou Public Relations
Martinez, CA

Project Title: Clipper® Customer Education/Outreach Services

Purpose of Amendment: On-call public outreach services.

Brief Scope of Work: Provide general education and communicate the benefits of Clipper® to Bay Area transit riders, including Title VI protected customers.

Project Cost Not to Exceed: \$30,000 (this Amendment)
Total Contract value including Amendments before this Amendment = \$95,000
Total contract amount with this Amendment = \$125,000

Funding Source: Regional Measure 2 Marketing

Fiscal Impact: Funds included in the FY 2014-15 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into one or more Contract Amendments with Caribou Public Relations for the purposes described herein and in the Executive Director's January 2, 2015 memorandum, and the Chief Financial Officer is authorized to set aside \$30,000 for one or more such Contracts or Contract Amendments.

Operations Committee:

Jake Mackenzie, Chair

Approved: Date: January 9, 2015