



Summary of eFare Activities -- August 2016



Policies and Principles of the Board

- ◆ Fare capping and stored value
- ◆ Begin phase out of paper passes and tickets shortly after eFare launch
- ◆ eFare market penetration is key
- ◆ Equalize Honored Citizen & Youth fares
- ◆ Electronically manage transfers
- ◆ A massive education campaign is necessary, especially communities in transition
- ◆ Cash paying customers will continue to have access to single tickets and 1-Day passes on bus and rail
- ◆ Expand eFare accessibility to as many as possible, with emphasis for low income and minority riders

Highlights of Last Two Months

Hop Fastpass card readers are installed at all rail stations and on all buses. The equipment is performing well during testing. Staff conducted two weeks of demos for hundreds of bus operators at Center St during sign ups. Feedback from operators was overwhelmingly positive, with a few minor design change recommendations that will be implemented, such as operators seeing the results of a Hop Fastpass tap on their screen while operators print a paper transfer for a cash paying customer.

- ◆ **Monthly Express Line updates to prepare all TriMet staff for Hop Fastpass continues. First video was filmed and is being compiled**
- ◆ **Completed two weeks of system demos at Center St for hundreds of bus operators during sign up**
- ◆ **Signed agreement between Plaid Pantry and Ready Credit to sell Hop Fastpass cards**
- ◆ **Continued development of moovel, N.A. mobile apps and The Brigade websites**
- ◆ **Staff continues to make progress addressing the findings related to the Hop Fastpass security, integration and project management assessments**
- ◆ **Drafting of the Hop Fastpass Operating Rules continues**
- ◆ **Ticket Vending Machine Hop Fastpass retrofit Design at approx. 90%**
- ◆ **Successful and engaging Transit on Tap discussion at the Blitz Ladd in Portland with 48 participants**
- ◆ **Began project planning to replace all employee door access cards that also work on Hop card readers**
- ◆ **Will begin LIFT integration with Hop Fastpass back office with July Board approval of Trapeze contract**
- ◆ **Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation**

Key Challenges Staff is working on to Remain on Target

Staff is focused on vendor software development sprints and preparation for the next series of lab testing in August, including accounting reconciliations, open payments, fare inspection, failover testing, and end-to-end retail network testing.

Hop Signage on Orange Line



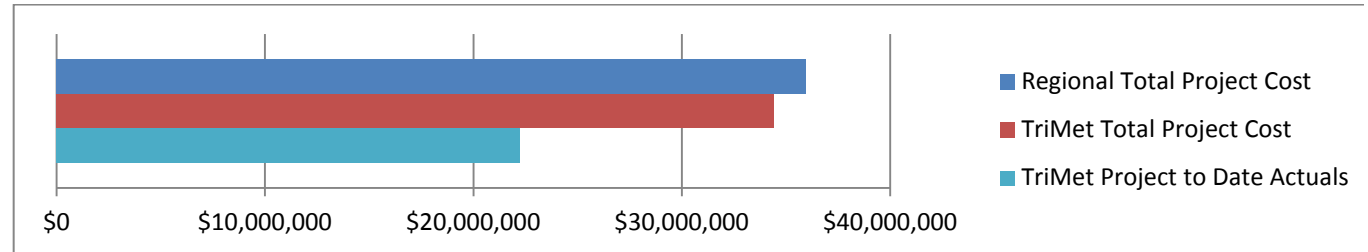
Table 1

| Task Name | Start | Finish | Jan '12 | Jan '13 | Jan '14 | Apr '14 | Jul '14 | Oct '14 | Jan '15 | Apr '15 | July '15 | Oct'15 | Jan '16 | Apr '16 | Jul '16 | Oct '16 | Jan '17 | Jan '18 | |
|---|------------|------------|---------------|---------|---------|---------|---------|---------|---------|---------|----------|--------------|---------|---------|---------|---------|---------|---------|--|
| Overall eFare Program - Plan | 1/1/2012 | 12/31/2017 | First 3 years | | | | | | | | | Last 3 Years | | | | | | | |
| Overall eFare Program - Actual | 1/1/2012 | 12/31/2017 | | | | | | | | | | | | | | | | | |
| Issue Technical Services Consultant RFP | 4/1/2012 | 7/1/2012 | | | | | | | | | | | | | | | | | |
| Award Technical Services Consultant contract | 10/1/2012 | 10/1/2012 | | | | | | | | | | | | | | | | | |
| Draft System Integration, Retail Network Scope and RFPs | 10/1/2012 | 4/1/2014 | | | | | | | | | | | | | | | | | |
| Award System Integration, Retail Network contracts | 4/1/2014 | 9/30/2014 | | | | | | | | | | | | | | | | | |
| System Integrator (INIT) Design - Plan | 7/1/2014 | 2/1/2015 | | | | | | | | | | | | | | | | | |
| System Integrator (INIT) Design - Actual | 7/1/2014 | 5/31/2015 | | | | | | | | | | | | | | | | | |
| System Integrator (INIT) Development & Test - Plan | 3/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| System Integrator (INIT) Development & Test- Actual | 3/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Civil Design & Construction Validator Placement - Plan | 4/1/2014 | 12/31/2015 | | | | | | | | | | | | | | | | | |
| Civil Design & Construction Validator Placement - Actual | 4/1/2014 | 12/31/2015 | | | | | | | | | | | | | | | | | |
| Platform Cabling and Network Infrastructure -- Plan | 10/1/2015 | 3/31/2016 | | | | | | | | | | | | | | | | | |
| Platform Cabling and Network Infrastructure -- Actual | 10/1/2015 | 3/31/2016 | | | | | | | | | | | | | | | | | |
| Retail Network (Ready Credit) Design - Plan | 9/9/2014 | 3/27/2015 | | | | | | | | | | | | | | | | | |
| Retail Network (Ready Credit) Design - Actual | 9/9/2014 | 6/24/2015 | | | | | | | | | | | | | | | | | |
| Retail Network (Ready Credit) Development & Test - Plan | 7/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Retail Network (Ready Credit) Development & Test - Actual | 7/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Preliminary Design - Plan | 11/10/2014 | 2/1/2015 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Preliminary Design - Actual | 11/10/2014 | 6/30/2015 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Final Design - Plan | 2/1/2015 | 4/3/2015 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Final Design - Actual | 7/1/2015 | 12/4/2015 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Development & Test - Plan | 11/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Mobile Apps (GlobeSherpa) Development & Test - Actual | 11/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Websites (Brigade) Design - Plan | 4/1/2015 | 6/30/2015 | | | | | | | | | | | | | | | | | |
| Websites (Brigade) Final Design - Actual | 4/1/2015 | 6/30/2015 | | | | | | | | | | | | | | | | | |
| Websites (Brigade) Development & Test - Plan | 7/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Websites (Brigade) Development & Test - Actual | 7/1/2015 | 12/31/2016 | | | | | | | | | | | | | | | | | |
| Branding (name and logo) - Plan | 10/1/2014 | 2/1/2015 | | | | | | | | | | | | | | | | | |
| Branding (name and logo)- Actual | 10/1/2014 | 4/1/2015 | | | | | | | | | | | | | | | | | |
| Ticket Vending Machines - Plan | 1/1/2015 | 12/31/2017 | | | | | | | | | | | | | | | | | |
| Ticket Vending Machines - Actual | 1/1/2015 | 12/31/2017 | | | | | | | | | | | | | | | | | |

Table 1 is a **summary** schedule of key eFare activities. Each Task Name shows the plan (original schedule) and actual (current schedule). Green bars indicate on-time tasks, red bars indicate delayed tasks, and gray bars indicate previous tasks. This schedule includes tasks from the onset of the eFare project in 2012. Staff also maintains a comprehensive, detailed project schedule for project management purposes. The project is on schedule.

Project Financial Status as of 6/30/16

| | |
|-----------------------------|------------|
| Regional Total Project Cost | \$35.9 mil |
| TriMet Total Project Cost | \$34.4 mil |
| Project to Date Expenses | \$22.2 mil |



Mobile Applications

- ◆ Fare Inspection app development for Android devices is approximately 90% developed and preliminary testing was successful. Design is nearly complete for the Ingenico device, which will be Bluetooth connected to fare inspectors Android smart Phone and app. The Ingenico device supports all the security requirements of inspecting bank cards and Hop cards.

Bus Operator
Hop Demos

Back Office

- ◆ All systems are installed and running at the TriMet data centers, and basic transactions are flowing through
- ◆ Bi-weekly website reviews occur as additional interactions of functionality are developed
- ◆ Data speeds and connections from C-TRAN to TriMet exceeded expectations

Retail Network

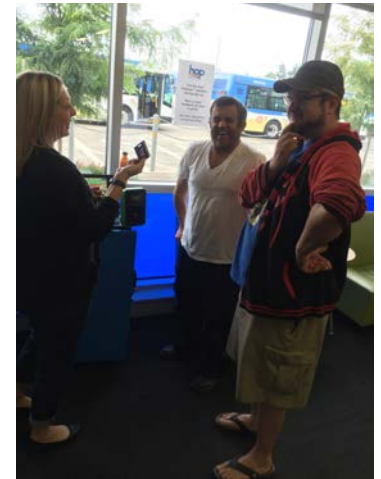
- ◆ Signed agreement between Plaid Pantry and Ready Credit to sell Hop Fastpass cards. Next steps are technical integration and design for card reloads
- ◆ Ready Credit hired a local sales manager to continue outreach and coverage expansion of retail stores.
- ◆ Significant retail network system integration development has occurred and end to end testing continues.

Card Reader Installation

- ◆ All TriMet card readers are installed. Adhoc field testing has begun; C-TRAN reader installs will be completed by August. Streetcar card reader installs are scheduled be completed in September.

Branding & Public Outreach

- ◆ Staff continuing Public Education Campaign designed to increase general awareness of Hop Fastpass, including updates to myhopcard.com, development of Hop educational videos, and continued communication with customers through printed and electronic information.
- ◆ Continuing to refine outreach plans to educate vulnerable communities, including organizations representing the elderly and people with disabilities, Access Transit participants, LIFT riders, and others. The Outreach team will be adding two staff members in August to increase efforts.



DMWESB Update

| TriMet eFare Contracts | % Local Spend to Date | Contract Spent to Date | DMWESB Spent to Date | DMWESB to Date as % Contract Spent to Date |
|--|-----------------------|------------------------|----------------------|--|
| CH2MHill Phase 1 (Mallaris) | Local | \$599,174 | \$36,698 | 6.12% |
| CH2MHill Phase 2 (Mallaris) | Local | \$1,904,361 | \$44,110 | 2.32% |
| CH2MHill Phase 2 (Emerio) | Local | \$1,904,361 | \$11,582 | 0.61% |
| CH2MHill Phase 2 (J3 Technical Services) | Local | \$1,904,361 | \$89,154 | 4.68% |
| CH2MHill Phase 2 (DL Design) | Local | \$1,904,361 | \$56,163 | 2.95% |
| Stacy Witbeck (Raimore, et al.) | Local | \$9,486,350 | \$2,062,493 | 21.74% |
| INIT (Accumen, misc) | California | \$4,644,682 | \$197,894 | 4.26% |
| INIT (Auriga) | California | \$4,644,682 | \$43,960 | 0.95% |
| INIT (Brigade) | Local | \$4,644,682 | \$120,000 | 2.58% |
| Ready Credit (Lori O.) | Minnesota | \$56,400 | \$216,825 | 384.44% |
| GlobeSherpa (Mallaris) | Local | \$43,255 | \$2,672 | 6.18% |
| GlobeSherpa (DMWESB) | Local | \$43,255 | \$43,255 | 100.00% |
| DHM (DMWESB) | Local | \$10,500 | \$10,500 | 100.00% |
| KFH (DMWESB) | Maryland | \$110,815 | \$110,815 | 100.00% |
| Knapick, LLC (DMWESB) | Local | \$2,300 | \$2,300 | 100.00% |
| | 81.32% | \$16,857,837 | \$3,048,421 | 18.08% |

Highlights of Next Two Months

- ◆ Finish Phase 2 System Integration Lab Tests; agile software development will continue over the next several months
- ◆ Preparing for System Integrated Field Testing, which includes rigorous scripted testing between the card readers, the back office, website, call center systems, accounting systems, etc
- ◆ Near completion of procedure writing for operating the systems
- ◆ 200+ agency employees do to Adhoc field testing to provide preliminary feedback on design and functionality.