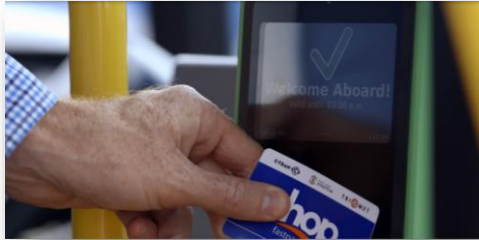# TRI☉MET
Summary of eFare Activities -- June 2017

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

We had a very successful Beta by recruiting over 5,000 testers tapping Hop cards hundreds of thousands of times, loading money via the website and mobile apps, and setting up Auto-Load. Over 1,000 public testers responded to a follow-up survey, with an overall satisfaction rating of 96%. The system has proven reliable and very intuitive, as the number of testers needing assistance from Customer Service is much lower than expected.

- ◈ Public Beta now has 5,000+ testers and is nearly complete
- ◈ Beta testers report an overall satisfaction rating of 96%
- ◈ Successful Beta test of the consumer website
- ◈ Successful Beta test of the mobile apps on Android and iOS platforms
- ◈ The Hop Fastpass Operating Rules are substantially complete
- ◈ Ticket Vending Machine Hop Fastpass development substantially complete and on schedule for installation Q4 2017
- ◈ LIFT/Trapeze integration work with Hop Fastpass substantially complete
- ◈ TriMet passed the rigorous EMV/banking certification process to accept Apple Pay, Android Pay and Samsung Pay.
- ◈ Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation

Key Challenges Staff is working on to Remain on Target

Staff focuses on adding stores to the retail network to ramp up 300+ stores supporting card loading by launch, 400+ stores by end of summer and 500+ stores by spring 2018. Staff began open payment testing (tapping smart phones using Apple Pay, Android Pay and Samsung Pay). Fare inspection device testing is nearly complete with key issues addressed.

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	Jul '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, Development & Test - Plan	7/1/2014	12/31/2016																
System Integrator (INIT) Design Development & Test- Actual	7/1/2014	12/31/2016																
System Integrator (INIT) Friendly User Testing - Plan	1/29/2017	7/15/2017																
System Integrator (INIT) Friendly User Testing- Actual	1/29/2017	7/15/2017																
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 (Ready Credit) Design, Development & Test - Plan	9/9/2014	12/31/2016																
Retail (Ready Credit) Design, Development & Test - Actual	9/9/2014	12/31/2016																
Retail (Ready Credit) Friendly User Testing - Plan	2/28/2017	7/15/2017																
Retail (Ready Credit) Friendly User Testing - Actual	2/28/2017	7/15/2017																
Mobile Apps (moovel) Design, Development & Test - Plan	11/10/2014	12/31/2016																
Mobile Apps (moovel) Design, Development & Test - Actual	11/10/2014	12/31/2016																
Mobile Apps (moovel) Friendly User Testing - Plan	3/31/2017	7/15/2017																
Mobile Apps (moovel) Friendly User Testing - Actual	3/31/2017	7/15/2017																
Websites (Brigade) Design, Development & Test - Plan	4/1/2015	12/31/2016																
Websites (Brigade) Design, Development & Test - Actual	4/1/2015	12/31/2016																
Websites (Brigade) Friendly User Testing - Plan	2/28/2017	7/15/2017																
Websites (Brigade) Friendly User Testing- Actual	2/28/2017	7/15/2017																
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 5/31/17

Regional Total Project Cost	$35.9 mil
TriMet Total Project Cost	$34.4 mil
Project to Date Expenses	$24.1 mil
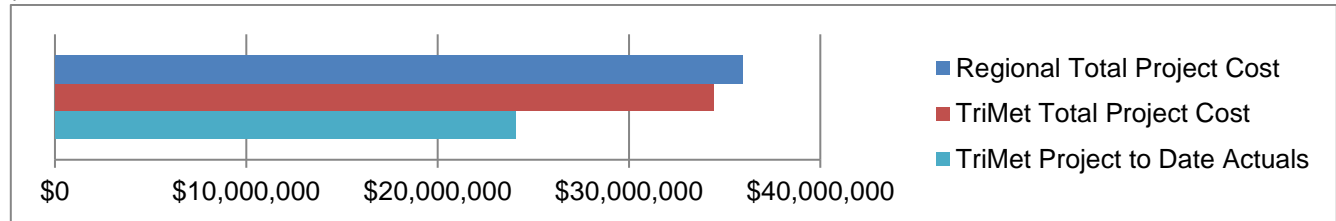
Mobile Applications

◈ Fare Inspection and Account Management app development for iOS and Android is complete, including very creative fare capping design displayed in-app.

Back Office

◈ Open Payments EMV/banking certification complete
◈ Institutional website Beta testing underway with a few organizations
◈ Accounting system testing complete, with additional reports arriving soon
◈ Load and failover testing mostly complete

Retail Network

◈ 7-Eleven went live in May
◈ Plaid Pantry integration complete. Lab testing underway
◈ Blackhawk network integration testing nearly complete. One remaining issue to be fixed
◈ Beta testing at 200 retail stores nearly complete. Based on the number of new clerks assigned to retail stores, staff expects the first few weeks of launch to require extra resources and training to make the user experience is as seamless as possible.
◈ Retail packaging tested by a few thousand Beta testers with no issues reported.

Card Reader Installation

◈ Card readers are performing well, and should receive the latest software to accept open payments in the next few weeks.

Branding & Public Outreach

◈ Staff completed an extensive survey of Beta testers, and over 1,000 testers responded. We received detailed feedback and staff is pleased with a 96% overall satisfaction rating of the system. Staff continues 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 all communities

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	$2,435,551	$46,833	1.92%
CH2MHill Phase 2 (Emerio)	Local	$2,435,551	$11,582	0.48%
CH2MHill Phase 2 (J3 Technical Services)	Local	$2,435,551	$190,239	7.81%
CH2MHill Phase 2 (DL Design)	Local	$2,435,551	$56,163	2.31%
CH2MHill Phase 2 (Schaich Consulting)	Local	$2,435,551	$29,003	1.19%
Stacy Witbeck (Raimore, et all)	Local	$9,605,171	$2,206,526	22.97%
INIT (Accumen, misc)	California	$7,080,299	$197,894	2.79%
INIT (Auriga)	California	$7,080,299	$69,134	0.98%
INIT (Brigade)	Local	$7,080,299	$152,500	2.15%
INIT (Transcend Telematics)	Utah	$7,080,299	$13,000	0.18%
Ready Credit (Lori O.)	Minnesota	$193,146	$355,545	184.08%
moovel (Mallaris)	Local	$242,076	$2,205	0.91%
moovel (DMWESB)	Local	$242,076	$242,076	100.00%
DHM (DMWESB)	Local	$10,500	$10,500	100.00%
KFH (DMWESB)	Maryland	$110,815	$110,815	100.00%
Knapick, LLC (DMWESB)	Local	$12,200	$12,200	100.00%
	79.28%	$20,288,932	$3,742,911	18.45%

Highlights of Next Two Months

- ◈ Finish Beta Testing; Begin Public Launch!
- ◈ Focus on retail network onboarding and training
- ◈ Public outreach and education
- ◈ Delivery of additional reports
- ◈ Increase number of institutions in the program