



## Summary of eFare Activities February 2015



**Policies and Principles of the Board** - Board consensus at Oct 2014 Retreat -- pending Title VI review and 2015 Fare Ordinance

- ◆ Fare capping and stored value
- ◆ Begin phase out paper passes and tickets shortly after eFare launch
- ◆ eFare market penetration is key
- ◆ Equalize Honored Citizen & Youth fares in the future
- ◆ Electronically manage all transfers
- ◆ A massive education campaign is necessary, especially communities in transition

### Highlights of Last Two Months

Overall eFare milestones are on schedule and on budget, except for pending civil construction cost pressures. Staff and contractors are focused on all aspects of the project plan to maintain schedule and budget, while holding functionality and quality expectations very high.

- ◆ Completed Final Design workshops for INIT developed back end systems
- ◆ Completed Final Design for locations of all bus validators. Rail validator final design placement near 100% completion
- ◆ Received Preliminary Design Review documents from GlobeSherpa for mobile apps on time and at 75% completion
  - GlobeSherpa is leveraging experience from other agency projects to simplify design process
- ◆ Completed preliminary eFare TVM scope of work
- ◆ Completed Preliminary Title VI Fare Equity Analysis
- ◆ Selected Brigade as local e-commerce/website developer
- ◆ Expanded project schedule in this document per Director Prosser's request
- ◆ Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation, including 22% civil DBE commitment from Stacy & Witbeck via Raimore Construction, and identified several DMWESB vendors to be in scope for the eFare project. Some vendors still in certification process.

### Key Challenge Staff is working on to Remain on Target

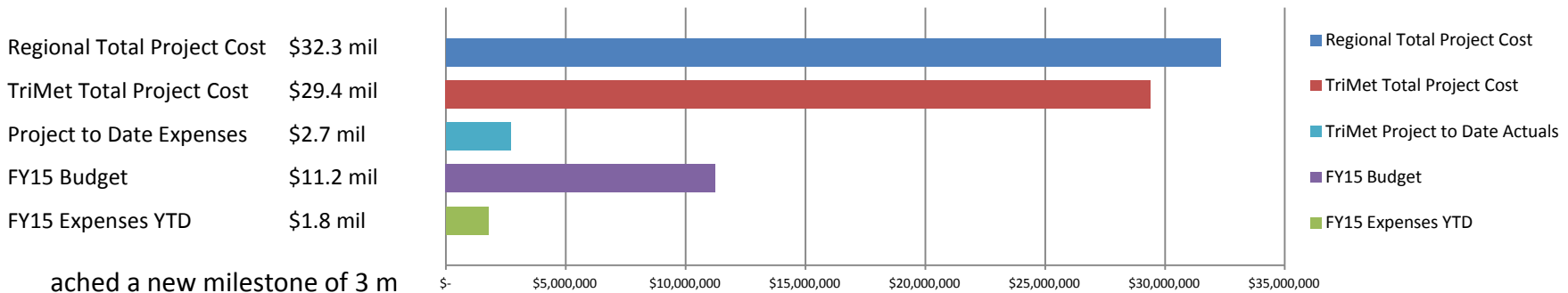
TriMet has advanced preconstruction and design work, and surveyed each individual station to determine the work necessary station-by-station. This detailed work has identified additional construction scope and cost that was not anticipated in the preliminary estimate. Contractor pricing for eFare validator civil construction installation is \$2,323,770 higher than the August 13 Board Authorization. This is "remodel" type work, which is leading to unforeseen cost drivers. Staff is currently evaluating value engineering opportunities to reduce cost where possible. The Project Financial Status report costs below will be updated after value engineering and final pricing.

**Table 1-1**

| Task Name   | Start      | Finish     | Jan '12     | Jan '13     | Jan '14 | Apr '14     | Jul '14     | Oct '14     | Nov '14     | Dec '14     | Jan '15     | Feb '15     | Mar '15     | Apr '15     | July '15    | Oct '15     | Jan '16     | Jan '17     | Jan '18     |
|---|------------|------------|-------------|-------------|---------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Overall eFare Program - Plan                              | 1/1/2012   | 12/31/2017 | [Green bar] |             |         |             |             |             |             |             |             |             |             |             |             |             |             |             |             |
| Overall eFare Program - Actual                            | 1/1/2012   | 12/31/2017 | [Green bar] |             |         |             |             |             |             |             |             |             |             |             |             |             |             |             |             |
| Issue Technical Services Consultant RFP                   | 4/1/2012   | 7/1/2012   | [Green bar] |             |         |             |             |             |             |             |             |             |             |             |             |             |             |             |             |
| Award Technical Services Consultant contract              | 10/1/2012  | 10/1/2012  | [Green bar] |             |         |             |             |             |             |             |             |             |             |             |             |             |             |             |             |
| Draft System Integration, Retail Network Scope and RFPs   | 10/1/2012  | 4/1/2014   | [Green bar] | [Green bar] |         |             |             |             |             |             |             |             |             |             |             |             |             |             |             |
| Award System Inegration, Retail Network contracts         | 4/1/2014   | 9/30/2014  |             |             |         | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |             |             |
| System Integrator (INIT) Preliminary Design - Plan        | 7/1/2014   | 12/31/2014 |             |             |         |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |
| System Integrator (INIT) Preliminary Design - Actual      | 7/1/2014   | 12/31/2014 |             |             |         |             | [Green bar] | [Green bar] | [Red bar]   |             |             |             |             |             |             |             |             |             |             |
| System Integrator (INIT) Final Design - Plan              | 4/1/2014   | 2/1/2015   |             |             |         |             |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |
| System Integrator (INIT) Final Design - Actual            | 4/1/2014   | 3/9/2015   |             |             |         |             |             |             |             | [Green bar] | [Green bar] | [Red bar]   |             |             |             |             |             |             |             |
| Civil Construction Validator Placement Design - Plan      | 4/1/2014   | 2/15/2015  |             |             |         | [Green bar] | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |
| Civil Construction Validator Placement Design - Actual    | 4/1/2014   | 2/15/2015  |             |             |         | [Green bar] | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |
| Retail Network (Ready Credit) Preliminary Design - Plan   | 9/9/2014   | 12/15/2014 |             |             |         |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |
| Retail Network (Ready Credit) Preliminary Design - Actual | 9/9/2014   | 12/15/2014 |             |             |         |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |             |             |
| Retail Network (Ready Credit) Final Design - Plan         | 12/15/2014 | 3/27/2015  |             |             |         |             |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |
| Retail Network (Ready Credit) Final Design - Actual       | 12/15/2014 | 3/27/2015  |             |             |         |             |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |
| Mobile Apps (GlobeSherpa) Preliminary Design - Plan       | 11/10/2014 | 2/1/2015   |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Mobile Apps (GlobeSherpa) Preliminary Design - Actual     | 11/10/2014 | 2/1/2015   |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Mobile Apps (GlobeSherpa) Final Design - Plan             | 2/1/2015   | 4/3/2015   |             |             |         |             |             |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |
| Mobile Apps (GlobeSherpa) Final Design - Actual           | 2/1/2015   | 4/3/2015   |             |             |         |             |             |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |
| Title VI Analysis Preliminary Review- Plan                | 11/1/2014  | 12/15/2014 |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Title VI Analysis Preliminary Review - Actual             | 11/1/2014  | 12/15/2014 |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Title VI Final Analysis - Plan                            | 12/15/2014 | 9/30/2015  |             |             |         |             |             |             |             |             | [Green bar] | [Green bar] | [Green bar] | [Green bar] |             |             |             |             |             |
| Title VI Fianl Analysis - Actual                          | 12/15/2014 | 9/30/2015  |             |             |         |             |             |             |             |             | [Green bar] | [Green bar] | [Green bar] | [Green bar] |             |             |             |             |             |
| Branding (name and logo) - Plan                           | 10/1/2014  | 2/1/2015   |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Branding (name and logo)- Actual                          | 10/1/2014  | 2/11/2015  |             |             |         |             |             |             | [Green bar] | [Green bar] |             |             |             |             |             |             |             |             |             |
| Ticket Vending Machines - Plan                            | 1/1/2015   | 12/31/2017 |             |             |         |             |             |             |             |             |             | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] |
| Ticket Vending Machines - Actual                          | 1/1/2015   | 12/31/2017 |             |             |         |             |             |             |             |             |             | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] | [Green bar] |

Table 1-1 is a **summary** schedule of key eFare activities. Each Task Name shows the plan (original schedule) and actual (current schedule). Light green bars indicate on-time tasks, and red bars indicate tasks that took longer than previously scheduled. 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. As reported at the December 2014 TriMet Board Meeting, the red bars in this table illustrate the schedule impact when staff required INIT to resubmit several Preliminary Design documents fall 2014.

## Project Financial Status as of 1/31/15



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### Mobile Applications

- ◆ Reached a new milestone of 3 million tickets and over 10% of total revenue
- ◆ Reviewing GlobeSherpa's Preliminary Design Review submission for the new eFare account management app and fare inspection app
- ◆ Simplified design process as GlobeSherpa is using experience from its other projects

### Back Office

- ◆ Completed **Final Design Review workshops** of INIT's validators, back end system and integration services. Staff completing final review of design, with approval expected April 2015.
- ◆ Design includes: All back office software and hardware for transaction processing; system monitoring and management applications; maintenance & inventory management systems; Customer Relationship Management (CRM) system; financial clearing and settlement system; data warehouse and reporting system; Interactive Voice Response (IVR) system, and validators
- ◆ **Selected Local website design firm, Brigade**, as sub contractor to INIT **to design and develop the public eFare website**, as well as the institutional website that employers, schools, agencies and others will use to administer eFare.

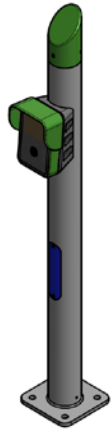
### Retail Network

- ◆ We are in final design of the Retail Network with contractor Ready Credit Corporation. Progress is on track.

### Title VI

- ◆ Reviewing the preliminary Title VI fare equity analysis from KFH Consulting. Will begin outreach services to minority and low-income communities.

Rail validator



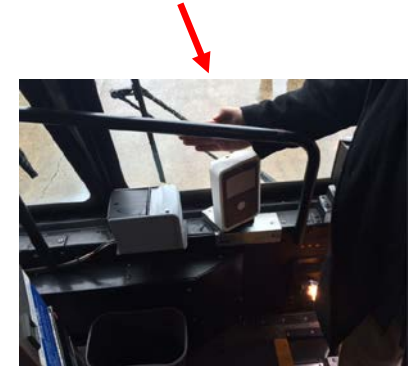
## Validator Installation

- ◆ Completed **90% design** of validator locations at rail stations. Installation is expected fall 2015.
- ◆ **Completed design** of validator locations on buses after an extensive review cycle including bus operators, safety teams, the Bus Operator Continuous Improvement Team, and the CAT Committee.

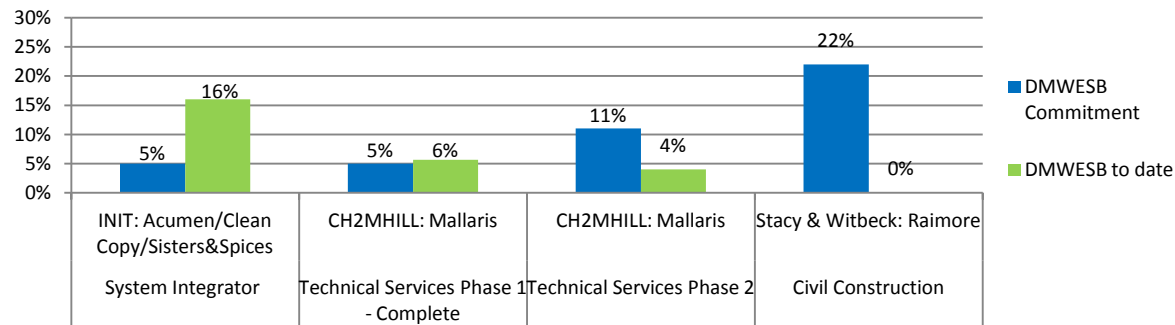
## Branding & Public Outreach

- ◆ Completed the name and logo design with Branding agency, HMH, and will reveal soon. Staff will incorporate into the eFare systems, such as the validators, smart cards and retail store packaging.
- ◆ Continuing Public Education Campaign designed to increase general awareness of eFare program.

Bus validator location



## DMWESB Update



### DMWESB Planned To Date:

- ◆ *Raimore - Civil*
- ◆ *Acumen - Integration Project Management*
- ◆ *GlobeSherpa - App Development*
- ◆ *Mallaris - Technical Writing*
- ◆ *Lori Orlikowski - Retail Project Management*
- ◆ *Knapick, LLC - Procedure Writing*
- ◆ *DHM - Focus Groups*
- ◆ *KFH - Title VI Analysis*
- ◆ *Clean Copy*
- ◆ *Sisters & Spices*

## Highlights of Next Two Months

- ◆ Completion of final design of back end system, retail network, mobile apps and civil construction
- ◆ Fabrication of bus validator brackets and rail validator poles begins
- ◆ Title VI analysis outreach begins
- ◆ eFare branding: integrate name, color, logo with card and packaging design
- ◆ Website design begins