



# Summary of eFare Activities August 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 – *Ordinance approved, effective Sept 2015*
  - ◆ Electronically manage all transfers
  - ◆ A massive education campaign is necessary, especially communities in transition

## Highlights of Last Two Months

INIT has made significant progress on software and hardware development, and TriMet IT completed the installation of all back office hardware. Also, eFare milestones are on schedule and on budget, except for civil construction cost pressures noted in previous Board updates. Staff and contractors are focused on the communication infrastructure design, and once the design and cost estimating is complete for this 'remodel' work, staff will come back to the in September Board seeking authorization. Thereafter, staff will update the project budget based on the latest civil and communication cost estimates.

- ◆ **Completed back office data center hardware installation**
- ◆ **Began development of INIT back office software**
- ◆ **Began development of Ready Credit systems for the retail network.**
- ◆ **Approved First Article Configuration Testing (FACI) -- INITs prototype hardware**
- ◆ **Development of INIT's Application Programming Interfaces (APIs) is approximately 90% complete**
- ◆ Completed several civil construction activities at 50% of rail platforms for future placement of eFare validators.
- ◆ Began Final Design of GlobeSherpa developed mobile apps.
- ◆ Near completion of websites Final Design; development has begun
- ◆ Significant progress developing eFare TVM contract for future Board authorization.
- ◆ Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation.
- ◆ Soliciting "independent reviewer" of eFare development.

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

Staff observed INIT's successful proof of concept demonstration of a contactless bank card being tapped on a validator, while using the latest in Payment Card Industry Data Security Standards (PCI-DSS). The test was successful, although it's important to note that banking and payment card regulations contain progressive security standards. Companies such as Apple, Google, Wells Fargo, VeriFone, Visa and MasterCard are a few of the key players involved in the evolution of payment card security and processing. Recent London TfL news highlighted a few of the complexities and benefits of contactless bank cards (open payments). Staff remains informed of the marketplace, the benefits and limitations of open payments, and is ensuring our current design leverages state-of-the art system security.

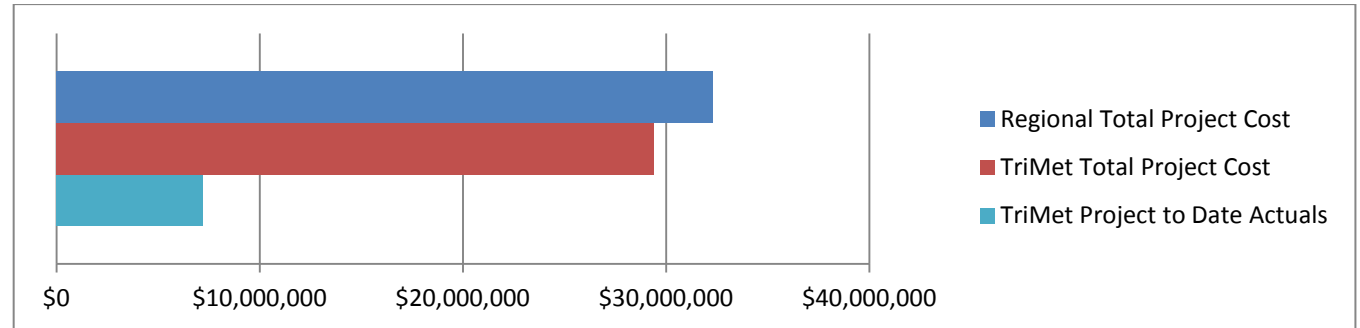
**Table 1**

Task Name	Start	Finish	Jan '12	Jan '13	Jan '14	Apr '14	Jul '14	Oct '14	Jan '15	Apr '15	July '15	Aug '15	Sep '15	Oct '15	Jan '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 Network Infrastructure -- Plan	10/1/2015	3/31/2016															
Platform 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) Preliminary 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	8/30/2015															
Websites (Brigade) Design - Plan	4/1/2015	6/30/2015															
Websites (Brigade) Final Design - Actual	4/1/2015	6/30/2015															
Title VI Outreach and Analysis - Plan	12/15/2014	11/30/2015															
Title VI Outreach and Analysis - Actual	12/15/2014	11/30/2015															
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. Despite a few areas of delay, the overall project remains on schedule.

## Project Financial Status as of 6/30/15

Regional Total Project Cost	\$32.3 mil
TriMet Total Project Cost	\$29.4 mil
Project to Date Expenses	\$7.2 mil



## Mobile Applications

- ◆ Began GlobeSherpa's Final Design Review for the new eFare account management app and fare inspection app
- ◆ GlobeSherpa was acquired by RideScout, which is a mobile app developer of transportation tools. RideScout was one of the first to develop an app based on TriMet's Open Data, and is currently partnering with TriMet to advance the integration of Shared Use Mobility with Transit. GlobeSherpa is a wholly-owned subsidiary of RideScout, and the GlobeSherpa CEO and team are expected to remain intact and operating as GlobeSherpa

## Back Office

- ◆ Completed back office hardware installation; began development of INIT back office software
- ◆ The Back office includes: 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
- ◆ Began development of the public eFare website, as well as the institutional website that employers, schools, agencies and others will use to administer programs. Local website design firm is Brigade, a sub contractor to INIT

Back office hardware



## Retail Network

- ◆ Ready Credit began outreach to retail store partners to achieve expanded coverage goals

## Title VI Outreach and Analysis

- ◆ Started Title VI Fare Equity Analysis outreach coordination with community-based organizations

Rail  
validator



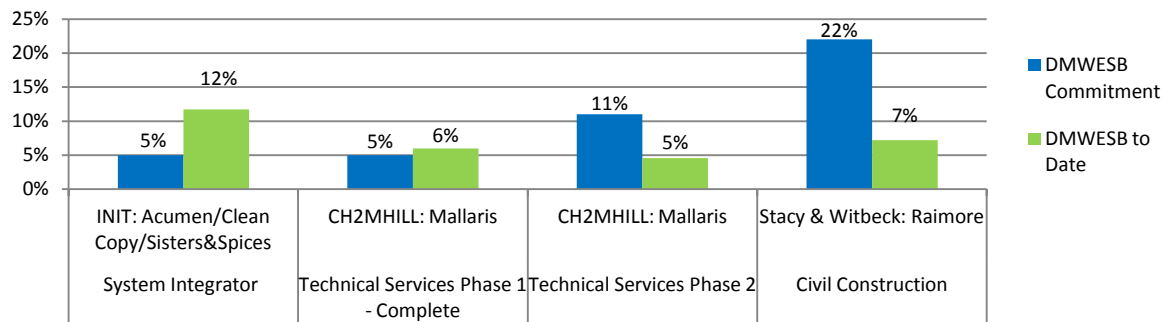
## Validator Installation

- ◆ Completed several civil construction activities, such as laying the conduit for future installation of poles, at 50% of the stations. Manufacturing of the rail validator mast/pole is in progress

## Branding & Public Outreach

- ◆ Staff is building the branding plan to incorporate 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, such as eFare information during Honored Citizen Fare increase outreach, as well as program information provided with platform construction notifications.

## 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
- ◆ Emerio Design – CAD
- ◆ Auriga Corp – Testing/QA

## Highlights of Next Two Months

- ◆ Civil construction continues at several platforms region-wide, including pulling cabling
- ◆ Near completion of Application Programming Interfaces (APIs) for INITs back end system
- ◆ Prepare for INIT Factory Acceptance Testing (FAT)
- ◆ Begin back office software installation
- ◆ Near completion of website development; complete design of mobile apps
- ◆ Negotiate eFare TVM contract modification, which will update the TVMs to support contactless, limited-use 2.5-hour and 1-Day tickets
  - **Requesting Board approval** of contract with Scheidt & Bachmann as early as October 2015.