TRIMET

Summary of eFare Activities
Feb 2016

We're building a new, state-of-the-art electronic fare system that will make it *faster, easier* and *more convenient* to ride the bus or train.

Policies and Principles of the Board - Board consensus -- pending Title VI review and 2016 Fare Ordinance
- 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 – *Ordinance approved, effective Sept 2015*
- 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

All areas of the project are in software and hardware development in preparation for System Integrated Lab Testing (SILT) in March 2016. Installation of cabling on buses is complete and ahead of schedule. Mast installs at rail stations at 80% completion and on schedule. All back office hardware and most software is installed and ready for SILT. eFare milestones are on schedule and on budget.

- **Completed preparation for key System Integrated Lab Testing (SILT) scheduled for March 2016**
- **Completion of independent review of system security and integration**
- **Completed design of Hop Fastpass contactless cards and retail packaging**
- **Continued development of Ready Credit retail network**
- **Integration of 3rd party vendors to Init's Application Programming Interfaces (APIs) is going well**
- **Completed several civil construction activities at 95% of rail platforms, and have installed validator masts at 80% of rail platforms. 50% of rail cabling and communications upgrades are complete**
- **Continued development of GlobeSherpa mobile apps**
- **Continued development of Brigade websites**
- **Issued fare media RFP**
- **Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation**

Rendering of installed Hop reader

Key Challenge Staff is working on to Remain on Target

Staff's recent focus is ensuring integration of all systems and vendors into the Init central system is seamless and successful. Extensive attention to detail has been used in preparation for Integrated Lab Testing March 2016. This includes ensuring each vendor is communicating frequently with Init on the back office integration.
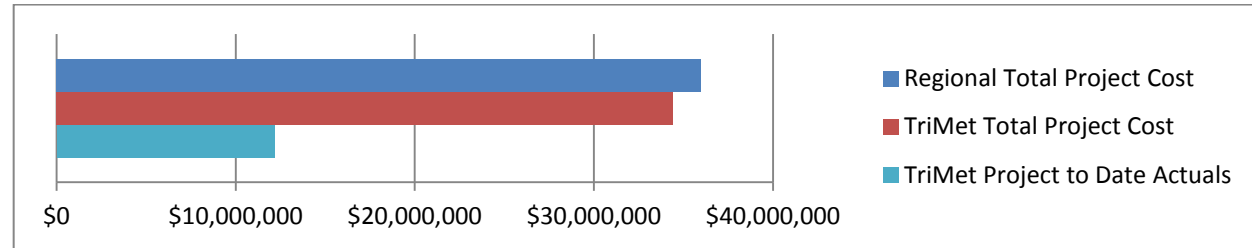
Table 1

Task Name	Start	Finish	Jan '12	Jan '13	Jan '14	Apr '14	Jul '14	Oct '14	Jan '15	Apr '15	July '15	Oct'15	Feb '16	Mar '16	Apr '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 Caling 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 12/31/15

Regional Total Project Cost $35.9 mil

TriMet Total Project Cost $34.4 mil

Project to Date Expenses $12.2 mil

Chart legend:
- Regional Total Project Cost
- TriMet Total Project Cost
- TriMet Project to Date Actuals

(Chart x-axis: $0, $10,000,000, $20,000,000, $30,000,000, $40,000,000)

Mobile Applications
◈ Significant development of GlobeSherpa's new eFare account management app and fare inspection app

Back Office
◈ Configuration of the back office hardware and Oracle software between two geographically redundant sites is complete
◈ The Init back office and devices 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
◈ Significant development of the public eFare website has occurred, as well as the institutional website that employers, schools, agencies and others will use to administer programs

Retail Network
◈ Ready Credit began outreach to retail store partners to achieve expanded coverage goals
◈ Significant Retail network system integration development has occurred

Title VI Outreach and Analysis
◈ Completed Title VI Fare Equity Analysis and report including Community Based Organization (CBO) outreach and feedback
◈ Final report submitted for review and approval at February Board meeting with the Second Reading of the Fare Ordinance

Future Account
Management App

Validator Installation
◈ Completed several civil construction activities, such as laying the conduit for future installation of poles, at 95% of the stations. Manufacturing of the rail validator mast/pole is complete and installation has occurred at approx 80% of platforms.
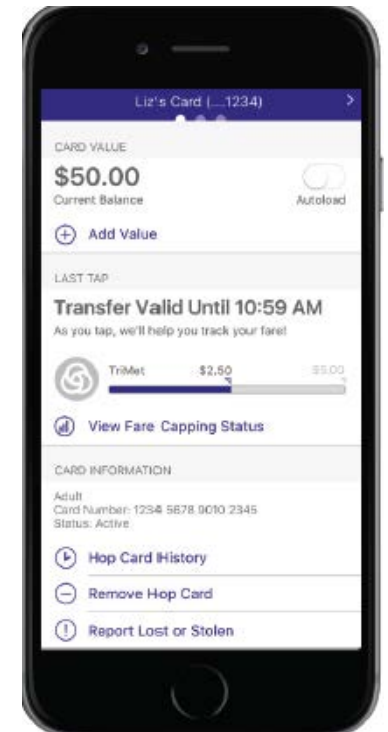
Branding & Public Outreach

◈ Staff is drafting a comprehensive public education outreach plan
◈ Continuing Public Education Campaign designed to increase general awareness of eFare program

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	$1,476,181	$41,905	2.84%
CH2MHill Phase 2 (Emerio)	Local	$1,476,181	$11,582	0.78%
CH2MHill Phase 2 (J3 Technical Services)	Local	$1,476,181	$53,733	3.64%
CH2MHill Phase 2 (DL Design)	Local	$1,476,181	$57,123	3.87%
Stacy Witbeck (Raimore, et all)	Local	$5,785,555	$1,359,736	23.50%
INIT (Accumen, misc)	California	$1,972,369	$197,894	10.03%
INIT (Auriga)	California	$1,972,369	-	0.00%
INIT (Brigade)	Local	$1,972,369	$120,000	6.08%
INIT (Elite AV)	Florida	$1,972,369	$139,260	7.06%
Ready Credit (Lori O.)	Minnesota	$56,400	$156,825	278.06%
GlobeSherpa (Mallaris)	Local	$43,255	$2,205	5.10%
GlobeSherpa **(DMWESB)**	Local	$43,255	$43,255	100.00%
DHM **(DMWESB)**	Local	$10,500	$10,500	100.00%
KFH **(DMWESB)**	Maryland	$56,529	$56,529	100.00%
Knapick, LLC **(DMWESB)**	Local	$1,225	$1,225	100.00%
	75.94%	**$10,001,188**	**$2,288,469**	**22.88%**

Highlights of Next Two Months

◈ System Integration Lab Testing at TriMet throughout March 2016
◈ Complete civil construction activities
◈ Complete installation of all masts at rail stations, including painted Hop Fastpass cap
◈ Complete installation of validator cabling at rail stations
◈ Begin preparation of validator installation and field testing
◈ Request Board approval of Fare Media RFP for ongoing operations of eFare