

Summary of eFare Activities -- December 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

Completed most scripted field tests of card readers, the back office, website, and call center systems. Agile software development of the websites and mobile apps will continue over the next several months, including interviews with riders to obtain website feedback to make interface improvements. Focused employee training has begun -- one trainer to two operators. The data warehouse was launched, and accounting reports under development. Preparing for all employees to switch to using dual chip employee ID cards early 2017 (card opens doors at TriMet facilities and is valid at Hop card readers).

- ◆ **Completed over 50% of System Integrated Field Testing (SIFT) of all systems**
- ◆ **Accounting reconciliations using test money occurring in December, with real money tests scheduled in January**
- ◆ **Continued development of mobile apps and websites**
- ◆ **Drafting of the Hop Fastpass Operating Rules continues**
- ◆ **Ticket Vending Machine Hop Fastpass retrofit design substantially complete**
- ◆ **Began LIFT/Trapeze integration work with Hop Fastpass back office**
- ◆ **Finalized artwork for all Hop Cards and retail packaging, and Hop Tickets**
- ◆ **Performed several back office failover and load tests**
- ◆ **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 rolling out new building access cards with photos and access to Hop Fastpass for all employees, as well as completing field tests and training staff on operating the system.

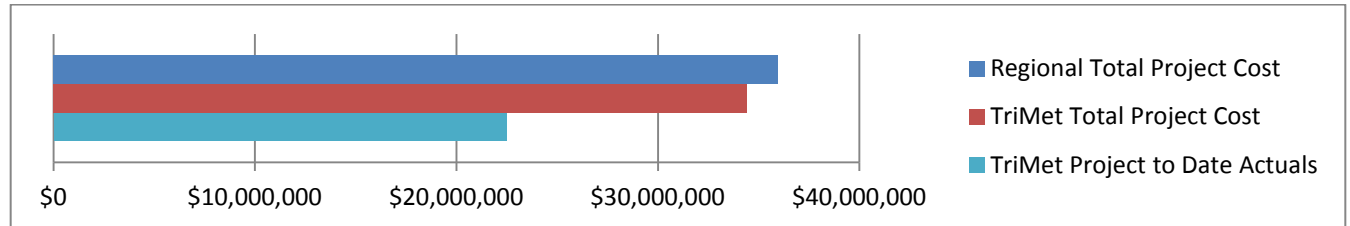
Table 1

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	Gray																	
Award Technical Services Consultant contract	10/1/2012	10/1/2012	Gray																	
Draft System Integration, Retail Network Scope and RFPs	10/1/2012	4/1/2014	Gray	Gray	Gray															
Award System Integration, Retail Network contracts	4/1/2014	9/30/2014				Gray	Gray													
System Integrator (INIT) Design - Plan	7/1/2014	2/1/2015						Gray												
System Integrator (INIT) Design - Actual	7/1/2014	5/31/2015						Gray	Gray											
System Integrator (INIT) Development & Test - Plan	3/1/2015	12/31/2016											Green	Green	Green					
System Integrator (INIT) Development & Test- Actual	3/1/2015	12/31/2016											Green	Green	Green					
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 10/31/16

Regional Total Project Cost	\$35.9 mil
TriMet Total Project Cost	\$34.4 mil
Project to Date Expenses	\$22.5 mil



Mobile Applications

- ◆ Fare Inspection app testing for Android devices was successful. Development nearly complete for the Ingenico fare inspection device, which is a Bluetooth-connected to fare inspector's smart phone app. iOS development well under way. Train the trainer will occur in December.

Back Office

- ◆ Test and production systems are installed and running at the TriMet data centers
- ◆ Website workshops occurring to improve initial design
- ◆ Data warehouse development completed and installed
- ◆ Accounting reports will be near completion in December

Retail Network

- ◆ Field testing at retail stores will be completed in January
- ◆ Plaid Pantry integration has begun
- ◆ Retail packaging and card design improvements address feedback during employee testing is complete

Card Reader Installation

- ◆ Streetcar card reader installs should be completed in December
- ◆ Training of TriMet Maintenance staff occurring in December and January

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.



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	\$134,406	7.06%
CH2MHill Phase 2 (DL Design)	Local	\$1,904,361	\$57,123	3.00%
Stacy Witbeck (Raimore, et all)	Local	\$9,486,350	\$2,206,526	23.26%
INIT (Accumen, misc)	California	\$4,543,739	\$197,894	4.36%
INIT (Brigade)	Local	\$4,543,739	\$152,500	3.36%
Ready Credit (Lori O.)	Minnesota	\$56,400	\$240,025	425.58%
moovel (Mallaris)	Local	\$43,255	\$2,205	5.10%
moovel (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	\$2,675	\$2,675	100.00%
	83.12%	\$16,757,268	\$3,250,314	19.40%

Highlights of Next Two Months

- ◆ Preparation for customer Beta testing
- ◆ Complete scripted field tests of card readers, the back office, website, and call center systems.
- ◆ Agile software development of the websites and mobile apps will continue over the next several months, including user interface improvements
- ◆ Development and delivery of accounting reports
- ◆ Preparation for employees to switch to using dual chip employee ID cards (card opens doors at TriMet facilities and is valid at Hop card readers)
- ◆ Complete nearly all SOPs and staff training