TRIMET
Summary of eFare Activities
Dec 2015

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 all 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 have made significant progress on software and hardware development, as well as installation of cabling on buses and masts at rail stations. All back office hardware and Oracle software is installed. Also, eFare milestones are on schedule and on budget, except for civil construction and communication costs noted in previous Board updates.

- **Completed highly successful Factory Acceptance Testing of INIT systems**
- **Awarded TVM upgrade contract to Scheidt & Bachmann**
- **Completed independent review of project with high marks for project management in all key areas**
- **Substantially completed design of Hop Fastpass contactless cards and retail packaging**
- **Continued development of Ready Credit systems for the retail network**
- **Development of INIT's Application Programming Interfaces (APIs) are substantially completed**
- **Completed installation of all eFare validator brackets and cabling on TriMet's bus fleet**
- **Completed several civil construction activities at 90% of rail platforms, and have installed validator masts at over 30% of rail platforms**
- **Development of GlobeSherpa mobile apps have begun**
- **Development of Brigade websites have begun**
- **Preparation of fare media RFP**
- **Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation**

Adult Hop Card
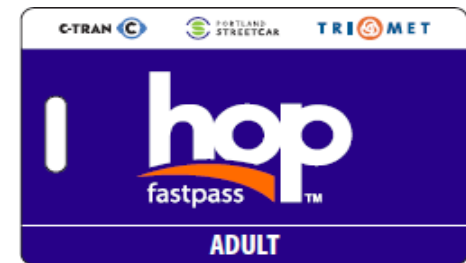
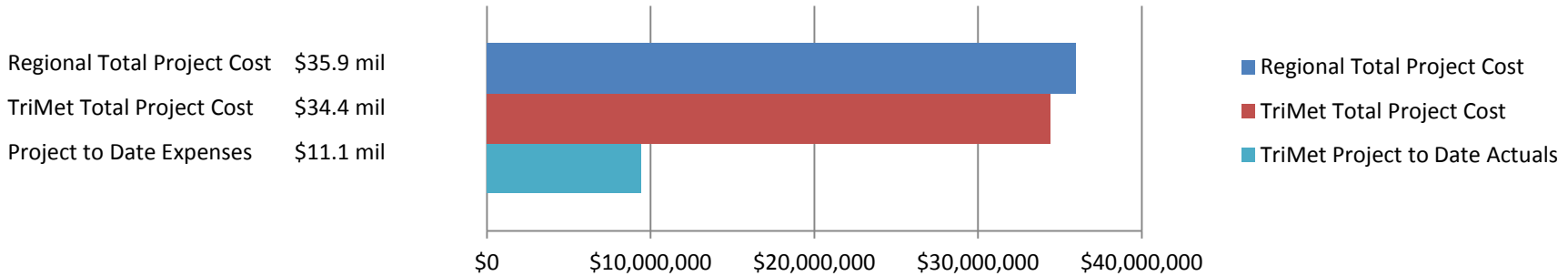## Key Challenge Staff is working on to Remain on Target

Following a very successful INIT Factory Acceptance Testing in November, staff has shifted primary focus to insure integration of all systems and vendors into the INIT central system is seamless and successful. Extensive planning and attention to detail are necessary to achieve successful Integrated Lab Testing Spring 2016.

Table 1

Task Name	Start	Finish	Timeline
			Jan '12 · Jan '13 · Jan '14 · Apr '14 · Jul '14 · Oct '14 · Jan '15 · Apr '15 · July '15 · Oct'15 · Dec '15 · Jan '16 · Feb '16 · Jan '17 · Jan '18
Overall eFare Program - Plan	1/1/2012	12/31/2017	First 3 years (gray) / Last 3 Years (green)
Overall eFare Program - Actual	1/1/2012	12/31/2017	First 3 years (gray) / Last 3 Years (green)
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
Award System Integration, Retail Network contracts	4/1/2014	9/30/2014	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
System Integrator (INIT) Development & Test - Plan	3/1/2015	12/31/2016	green
System Integrator (INIT) Development & Test- Actual	3/1/2015	12/31/2016	green
Civil Design & Construction Validator Placement - Plan	4/1/2014	12/31/2015	gray/green
Civil Design & Construction Validator Placement - Actual	4/1/2014	12/31/2015	gray/green
Platform Network Infrastructure -- Plan	10/1/2015	3/31/2016	green
Platform Network Infrastructure -- Actual	10/1/2015	3/31/2016	green
Retail Network (Ready Credit) Design - Plan	9/9/2014	3/27/2015	gray
Retail Network (Ready Credit) Design - Actual	9/9/2014	6/24/2015	gray
Retail Network (Ready Credit) Development & Test - Plan	7/1/2015	12/31/2016	green
Retail Network (Ready Credit) Development & Test - Actual	7/1/2015	12/31/2016	green
Mobile Apps (GlobeSherpa) Preliminary Design - Plan	11/10/2014	2/1/2015	gray
Mobile Apps (GlobeSherpa) Preliminary Design - Actual	11/10/2014	6/30/2015	gray
Mobile Apps (GlobeSherpa) Final Design - Plan	2/1/2015	4/3/2015	gray
Mobile Apps (GlobeSherpa) Final Design - Actual	7/1/2015	12/4/2015	gray
Mobile Apps (GlobeSherpa) Development & Test - Plan	11/1/2015	12/31/2016	green
Mobile Apps (GlobeSherpa) Development & Test - Actual	11/1/2015	12/31/2016	green
Websites (Brigade) Design - Plan	4/1/2015	6/30/2015	gray
Websites (Brigade) Final Design - Actual	4/1/2015	6/30/2015	gray
Websites (Brigade) Development & Test - Plan	7/1/2015	12/31/2016	green
Websites (Brigade) Development & Test - Actual	7/1/2015	12/31/2016	green
Branding (name and logo) - Plan	10/1/2014	2/1/2015	gray
Branding (name and logo)- Actual	10/1/2014	4/1/2015	gray
Ticket Vending Machines - Plan	1/1/2015	12/31/2017	green
Ticket Vending Machines - Actual	1/1/2015	12/31/2017	green

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 11/30/15

Regional Total Project Cost	$35.9 mil
TriMet Total Project Cost	$34.4 mil
Project to Date Expenses	$11.1 mil

Legend:
- Regional Total Project Cost
- TriMet Total Project Cost
- TriMet Project to Date Actuals

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

Mobile Applications

- ◈ Began development of GlobeSherpa's new eFare account management app and fare inspection app
- ◈ GlobeSherpa successfully launched the Ventra app in Chicago in November with 30k downloads in the first two days, which will have similar functionality as the Hop Fastpass app.

Back Office

- ◈ Configuration of the back office hardware between two geographically redundant sites is substantially complete.
- ◈ 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
- ◈ 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. Local website design firm is Portland's The Brigade, a sub contractor to INIT

Retail Network

- ◈ Ready Credit began outreach to retail store partners to achieve expanded coverage goals
- ◈ Retail network integration development has begun

Title VI Outreach and Analysis

- ◈ Wrapping up Title VI Fare Equity Analysis include Community Based Organization (CBO) outreach, and finalizing Title VI Analysis report

Future Rider App

Rail validator pole

Validator Installation

◈ Completed several civil construction activities, such as laying the conduit for future installation of poles, at 90% of the stations. Manufacturing of the rail validator mast/pole is near completion and installation has occurred at over 30% 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, such as the release of the Hop Fastpass brand and information at myhopcard.com, as well as program information provided with platform construction notifications
◈ Held group discussions with the Latino Network, Native American Youth and Family Center, Center for Intercultural Organizing, Asian Pacific American Network of Oregon, Black Parent Initiative, and Gladstone High School

DMWESB Update
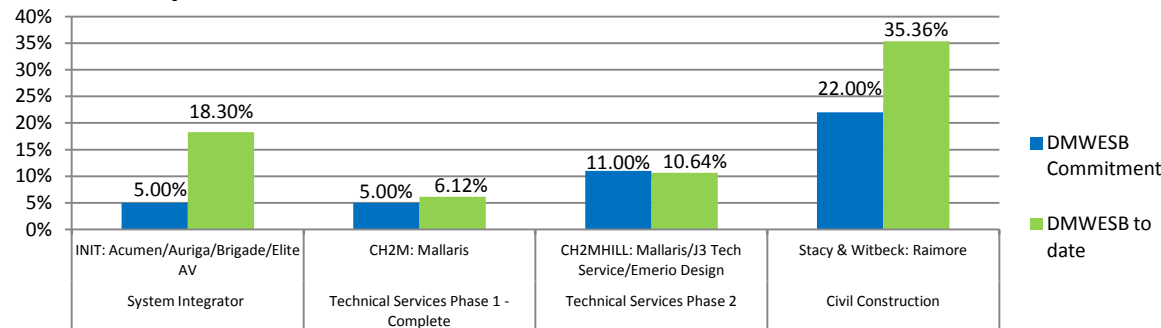
Highlights of Next Two Months

◈ Preparation for System Integration Lab Testing in Portland Spring 2016.
◈ Complete vast majority of civil construction activities
◈ Installation of nearly all masts at rail stations, including painted Hop Fastpass cap
◈ Complete installation of validator cabling at most rail stations
◈ Substantial completion of website and mobile app development
◈ eFare TVM Notice to Proceed
◈ Final Title VI Analysis report
◈ First and Second Board Reading of Fare Ordinance
◈ Issue Fare Media RFP

DMWESB Planned To Date:

◈ Raimore - Civil
◈ Acumen - Project Management
◈ GlobeSherpa - App Development
◈ Words by 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
◈ The Brigade – Website Design
◈ Elite AV – Equipment Installation
◈ DL Engineering – Construction Oversight
◈ J3 Tech Services – Installation Oversight