TRIMET

Summary of eFare Activities -- June 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
- 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

Civil construction at rail stations is completed on time and on budget, including communication infrastructure upgrades. Final Hop Fastpass card and retail packaging artwork was approved and samples have arrived. Preliminary validator field testing on bus and rail is going well, including assessing equipment durability – we have experienced vandalism on a handful of rail validators, which are quickly swapped out. eFare milestones are on schedule and on budget.

- **Completed end-to-end testing of bus validators and network connection to back office**
- **Received samples of Hop Fastpass contactless cards and retail packaging**
- **Staff began monthly Express Line updates to prepare all TriMet staff for Hop Fastpass; videos coming soon.**
- **Completed civil construction and communication upgrades at rail platforms**
- **Finished installation of validators at rail stations**
- **Continued development of Ready Credit retail network**
- **Continued development of moovel, N.A. (formally GlobeSherpa) mobile apps and The Brigade websites**
- **Board authorized fare media RFP**
- **Staff continues to make progress addressing the findings related to the Hop Fastpass security, integration and project management assessments.**
- **Staff began drafting participating transit agencies Hop Fastpass Operating Rules**
- **Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation**

Retail Packaging

ADULT $5–$250 +$3 load fee. Reload at myhopcard.com, participating retailers, Hop Fastpass app or 1-844-MYHOPCARD. This card has no value until activated by cashier

TRANSIT FARE CARD

hop fastpass™

C-TRAN · PORTLAND STREETCAR · TRIMET

ADULT

Key Challenges Staff is working on to Remain on Target

While Phase 1 of Lab Testing was completed, staff's focus is on keeping vendors on track related to the remaining agile software development over the next several months, which includes accounting reports and reconciliation, open payments, fare inspection and robust functionality within all the systems. In addition, project staff is overseeing validator installation in the field, preparation for field testing, and beginning to acquaint staff internally on operating and supporting the system.
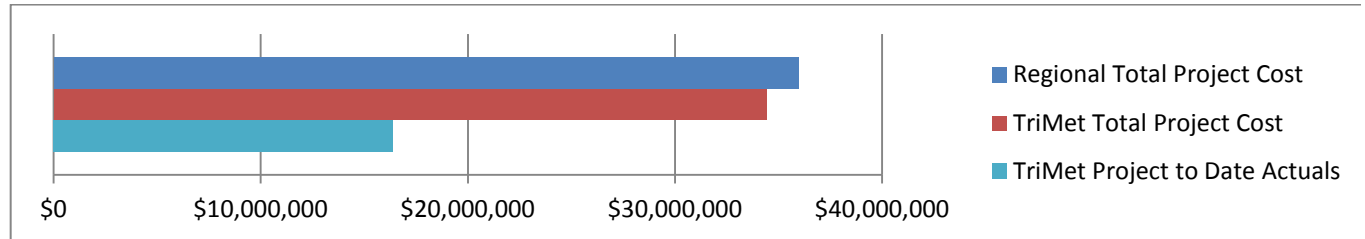
Table 1

Task Name	Start	Finish
Overall eFare Program - Plan	1/1/2012	12/31/2017
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 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

Timeline columns across the chart: Jan '12, Jan '13, Jan '14, Apr '14, Jul '14, Oct '14 (labeled "First 3 years") | Jan '15, Apr '15, July '15, Oct'15, Jan '16, Apr '16, Jul '16, Oct '16, Jan '17, Jan '18 (labeled "Last 3 Years").

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 4/30/16

Regional Total Project Cost	$35.9 mil
TriMet Total Project Cost	$34.4 mil
Project to Date Expenses	$16.4 mil

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
◈ Bi-weekly application reviews occur as additional iterations of functionality are developed.

Back Office
◈ Back office failover testing to the secondary site was scheduled for the second half of April, but was delayed until July to complete configuration, and to add additional test cases
◈ All systems are installed and running at the TriMet data centers, and basic transactions are flowing through
◈ Bi-weekly website reviews occur as additional interactions of functionality are developed
◈ Data speeds and connections from C-TRAN to TriMet exceeded expectations

Retail Network
◈ Ready Credit continues outreach to retail store partners to achieve expanded coverage goals
◈ Significant Retail network system integration development has occurred and end to end testing has begun.

Validator Installation
◈ Nearly completed installing rail validators system-wide and adhoc field testing has begun
◈ Bus validiator installs will be finished in July
◈ Verizon network speeds on bus meeting expectations, with plan to reconfigure network traffic in June. This change will increase data speeds and likely exceed original expectations

Branding & Public Outreach
◈ Staff continuing Public Education Campaign designed to increase general awareness of Hop Fastpass, such as Transit on Tap June 16

Bus validator
install & test
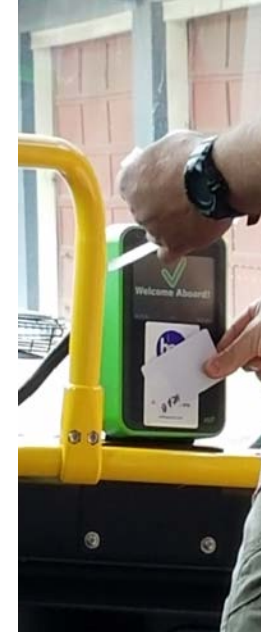
DMWESB Update

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	$1,598,744	$43,435	2.72%
CH2MHill Phase 2 (Emerio)	Local	$1,598,744	$11,582	0.72%
CH2MHill Phase 2 (J3 Technical Services)	Local	$1,598,744	$93,983	5.88%
CH2MHill Phase 2 (DL Design)	Local	$1,598,744	$56,163	3.51%
Stacy Witbeck (Raimore, et al.)	Local	$8,978,636	$2,045,660	22.78%
INIT (Accumen, misc)	California	$2,257,613	$197,894	8.77%
INIT (Auriga)	California	$2,257,613	$43,960	0.00%
INIT (Brigade)	Local	$2,257,613	$120,000	5.32%
INIT (Elite AV)	Florida	$2,257,613	$139,260	6.17%
Ready Credit (Lori O.)	Minnesota	$56,400	$196,825	348.98%
GlobeSherpa (Mallaris)	Local	$43,255	$2,672	6.18%
GlobeSherpa **(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	$1,875	$1,875	100.00%
	78.17%	**$13,657,013**	**$3,154,577**	**23.10%**

Highlights of Next Two Months

◈ Finish nearly all Phase 2 System Integration Lab Tests; agile software development will continue over the next several months
◈ Continue procedure writing for operating the systems
◈ Begin distribution of test Hop Fastpass cards and retail packaging to a small number of employees for internal testing
◈ Preparation for a few hundred employee field testers late summer
◈ Staff drafting a detailed roll out plan