

Summary of eFare Activities -- October 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

- ◆ Finished System Integration Lab Testing (SILT) with 95% of tests passing; remaining tests will occur over the next few months. 200+ agency employees completed ad hoc field testing to provide preliminary feedback on design and functionality. As part of the evaluation process, employees were asked questions to obtain feedback on specific topics as well as general insights on system features. **Overall satisfaction rate was 96%**, with 65% very satisfied and 31% somewhat satisfied and 4% neutral, which are solid results for a *very* preliminary friendly user test. Kicked off System Integrated Field Testing (SIFT) mid-October, which includes rigorous scripted *field* testing between the card readers, the back office, website, call center systems, accounting systems, and loading money from retail stores in the field.
- ◆ **Six educational Hop videos were filmed and are being rolled out to all agency employees over the coming months**
- ◆ **Successfully tested nearly all key pieces of accounting systems, with remaining tests scheduled through January**
- ◆ **Continued development of moovel, N.A. mobile apps and The Brigade websites**
- ◆ **Hop Fastpass system security assessment under way**
- ◆ **Drafting of the Hop Fastpass Operating Rules continues**
- ◆ **Ticket Vending Machine Hop Fastpass retrofit Design near completion**
- ◆ **Project to replace all employee door access cards that also work on Hop card readers well underway**
- ◆ **Began LIFT/Trapeze integration with Hop Fastpass back office**
- ◆ **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 the website and app user interface, and the Hop card reader screens to incorporate employee tester feedback and ensure it's as intuitive as possible. Vendor software development sprints and preparation for Field Testing continues. Minor adjustments will occur with the retail cards and packaging.

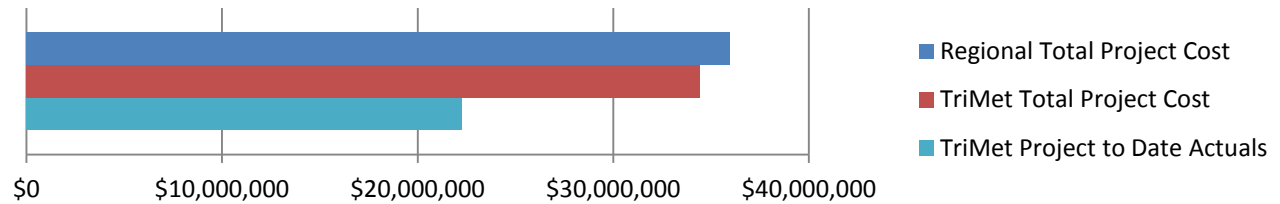
Table 1

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																	
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																	

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 9/30/16

Regional Total Project Cost	\$35.9 mil
TriMet Total Project Cost	\$34.4 mil
Project to Date Expenses	\$22.2 mil



Mobile Applications

- ◆ Fare Inspection app testing for Android devices was successful. Development nearly complete for the fare inspection device, which will be Bluetooth-connected to fare inspector's smart phone app. iOS development began.

Back Office

- ◆ All test systems are installed and running at the TriMet data centers
- ◆ The production system is being deployed
- ◆ Website and app design workshops occurring to improve initial design
- ◆ TriMet Ticket Office point of sale integrated testing was successful

Retail Network

- ◆ Successfully lab tested retail network system integration.
- ◆ Plaid Pantry project meetings are being scheduled
- ◆ Retail packaging design improvements are underway to address feedback during employee testing

Card Reader Installation

- ◆ Streetcar card reader installs should be completed in November (later than originally scheduled but in time for scripted field testing).

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. The Outreach team added two staff members in August to increase efforts.



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

- ◆ Complete 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 user interface improvements
- ◆ Begin employee training
- ◆ Development and delivery of system reports begins
- ◆ Preparation for all employees to switch to using dual chip employee ID cards (card opens doors at TriMet facilities and is valid at Hop card readers)