TRIMET

Summary of eFare Activities -- February 2017

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

We had a successful launch of employee and family testers in January increasing to all employees and family by end of March. Completed scripted field tests of card readers, the back office, website, and call center systems. A code freeze is now in place as we prepare for public Beta Testing end of February. Operations, Maintenance and Customer Service training is nearly complete.

- ◈ **Completed System Integrated Field Testing (SIFT) of all systems**
- ◈ **Preliminary real money accounting tests complete, with additional reporting in scope**
- ◈ **Continued development of mobile apps and websites**
- ◈ **Drafting of the Hop Fastpass Operating Rules continues**
- ◈ **Ticket Vending Machine Hop Fastpass retrofit development well underway**
- ◈ **LIFT/Trapeze integration work with Hop Fastpass back office well underway**
- ◈ **Hop Cards and Hop Tickets arrived for Beta Testing**
- ◈ **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 bug fixes and ensuring systems are as intuitive as possible for all users. Internal and external communication, education and training is ongoing and will require continuous rigor and focus as we launch this new way to pay for the region.

Table 1

Task Name	Start	Finish	Timeline (Jan '12 – 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 (Jan '12)
Award Technical Services Consultant contract	10/1/2012	10/1/2012	gray (Jan '12)
Draft System Integration, Retail Network Scope and RFPs	10/1/2012	4/1/2014	gray (Jan '12–Jan '14)
Award System Integration, Retail Network contracts	4/1/2014	9/30/2014	gray (Apr '14–Oct '14)
System Integrator (INIT) Design, Development & Test - Plan	7/1/2014	12/31/2016	gray (Jul '14–Oct '16)
System Integrator (INIT) Design Development & Test- Actual	7/1/2014	12/31/2016	gray (Jul '14–Oct '16)
System Integrator (INIT) Friendly User Testing - Plan	1/29/2017	7/15/2017	green (Jan '17)
System Integrator (INIT) Friendly User Testing- Actual	1/29/2017	7/15/2017	green (Jan '17)
Civil Design & Construction Validator Placement - Plan	4/1/2014	12/31/2015	gray (Apr '14–Oct'15)
Civil Design & Construction Validator Placement - Actual	4/1/2014	12/31/2015	gray (Apr '14–Oct'15)
Platform Cabling and Network Infrastructure - Plan	10/1/2015	3/31/2016	gray (Oct'15–Apr '16)
Platform Cabling and Network Infrastructure - Actual	10/1/2015	3/31/2016	gray (Oct'15–Apr '16)
Retail (Ready Credit) Design, Development & Test - Plan	9/9/2014	12/31/2016	gray (Jul '14–Oct '16)
Retail (Ready Credit) Design, Development & Test - Actual	9/9/2014	12/31/2016	gray (Jul '14–Oct '16)
Retail (Ready Credit) Friendly User Testing - Plan	2/28/2017	7/15/2017	green (Jan '17)
Retail (Ready Credit) Friendly User Testing - Actual	2/28/2017	7/15/2017	green (Jan '17)
Mobile Apps (moovel) Design, Development & Test - Plan	11/10/2014	12/31/2016	gray (Oct '14–Oct '16)
Mobile Apps (moovel) Design, Development & Test - Actual	11/10/2014	12/31/2016	gray (Oct '14–Oct '16)
Mobile Apps (moovel) Friendly User Testing - Plan	3/31/2017	7/15/2017	green (Jan '17)
Mobile Apps (moovel) Friendly User Testing - Actual	3/31/2017	7/15/2017	green (Jan '17)
Websites (Brigade) Design, Development & Test - Plan	4/1/2015	12/31/2016	gray (Apr '15–Oct '16)
Websites (Brigade) Design, Development & Test - Actual	4/1/2015	12/31/2016	gray (Apr '15–Oct '16)
Websites (Brigade) Friendly User Testing - Plan	2/28/2017	7/15/2017	green (Jan '17)
Websites (Brigade) Friendly User Testing- Actual	2/28/2017	7/15/2017	green (Jan '17)
Branding (name and logo) - Plan	10/1/2014	2/1/2015	gray (Oct '14–Jan '15)
Branding (name and logo)- Actual	10/1/2014	4/1/2015	gray (Oct '14–Apr '15)
Ticket Vending Machines - Plan	1/1/2015	12/31/2017	green (Jan '15–Jan '18)
Ticket Vending Machines - Actual	1/1/2015	12/31/2017	green (Jan '15–Jan '18)

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 12/31/16

Regional Total Project Cost	$35.9 mil
TriMet Total Project Cost	$34.4 mil
Project to Date Expenses	$22.8 mil

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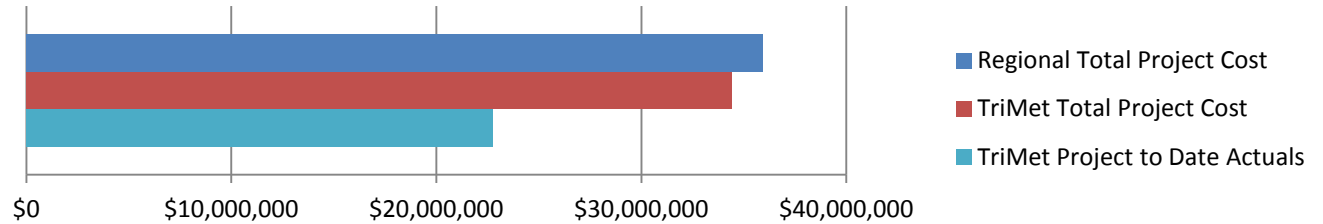
Mobile Applications

◈ Fare Inspection app testing for Android devices was completed and deployed to fare inspectors for Friendly User field testing. iOS fare inspection development approximately 75% complete. Successfully trained fare inspectors.

Back Office

◈ Production systems are installed and running at the TriMet data centers
◈ Consumer website will be deployed to production and ready for friendly user (Beta) testing
◈ Institutional website scheduled for Beta release by May 2017
◈ Accounting system testing complete, with additional reports under development

Retail Network

◈ Field testing at Beta retail stores nearly complete
◈ Blackhawk network integration testing nearly complete
◈ Greendot's 7/11 integration testing nearly complete
◈ Plaid Pantry integration has begun
◈ Retail packaging and card design improvements complete and cards being mailed to Beta testers

Card Reader Installation

◈ All 1200+ card readers installed system-wide
◈ Training of maintenance staff complete

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 all communities

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	$2,105,682	$46,000	2.18%
CH2MHill Phase 2 (Emerio)	Local	$2,105,682	$11,582	0.55%
CH2MHill Phase 2 (J3 Technical Services)	Local	$2,105,682	$190,239	9.03%
CH2MHill Phase 2 (DL Design)	Local	$2,105,682	$56,163	2.67%
CH2MHill Phase 2 (Schaich Consulting)	Local	$2,105,682	$8,350	0.40%
Stacy Witbeck (Raimore, et al)	Local	$9,605,171	$2,206,526	22.97%
INIT (Accumen, misc)	California	$6,750,225	$197,894	2.93%
INIT (Auriga)	California	$6,750,225	$69,134	1.02%
INIT (Brigade)	Local	$6,750,225	$152,500	2.26%
INIT (Transcend Telematics)	Utah	$6,750,225	$13,000	0.19%
Ready Credit (Lori O.)	Minnesota	$204,980	$289,305	141.14%
moovel (Mallaris)	Local	$123,544	$2,205	1.78%
moovel (DMWESB)	Local	$123,544	$123,544	100.00%
DHM (DMWESB)	Local	$10,500	$10,500	100.00%
KFH (DMWESB)	Maryland	$110,815	$110,815	100.00%
Knapick, LLC (DMWESB)	Local	$7,350	$7,350	100.00%
	80.51%	$19,517,441	$3,531,805	**18.10%**

Highlights of Next Two Months

◈ Friendly User Beta testing commences with 250 public testers
◈ Launch Hop support with regional Hop call center and TriMet Ticket Office
◈ Complete rollout of cards to employees and families
◈ Prepare for support of contactless bank cards and a few Institutions for friendly user (Beta) testing
◈ Delivery of additional reports
◈ Primary training and SOPs completed and implemented