TRIMET

Summary of eFare Activities
April 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 at Oct 2014 Retreat -- pending Title VI review and 2015 Fare Ordinance
- Fare capping and stored value
- Begin phase out paper passes and tickets shortly after eFare launch
- eFare market penetration is key
- Equalize Honored Citizen & Youth fares in the future
- Electronically manage all transfers
- A massive education campaign is necessary, especially communities in transition

Highlights of Last Two Months

eFare milestones are on schedule and on budget, except for civil construction cost pressures illustrated in previous Board updates. Staff and contractors are focused on all aspects of the eFare project plan to maintain schedule and budget, while holding functionality and quality expectations very high**.**

- House Bill 3062 passed the House and is queued up for the Senate, which exempts eFare stored balances from Oregon state unclaimed property and gift card laws.
- Completed Final Design workshops for INIT developed back end systems
- Began civil construction at rail stations for future placement of eFare validators
- Completed Final Design workshop with Ready Credit for the retail network
- Completed Preliminary Design workshops for GlobeSherpa developed mobile apps
- Finalized eFare TVM scope of work
- Started Title VI Fare Equity Analysis outreach coordination with community-based organizations
- Began design of e-commerce/website with local firm -- Brigade
- Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation, including 22% civil DBE commitment from Stacy & Witbeck via Raimore Construction, and identified several DMWESB vendors to be in scope for the eFare project. Some vendors are still in the certification process. INIT is close to contract execution with Auriga Corp headquartered in California, adding an additional 1% DMWESB commitment, bring them up to 6%. Auriga has a proven track record of system testing and quality assurance. CH2M HILL, working toward the 11% DBE commitment, identified a local DBE, Emerio Design, for CAD services for the civil construction work.

Key Challenge Staff is working on to Remain on Target

We are finalizing design of the Application Programming Interfaces (APIs), which are the point of integration for pulling the project together. APIs are the difference in this being an open system or just another monolithic system. It's critical to the project's success, so we're putting tremendous effort into creative collaboration between INIT and the other vendors to ensure a good product.

Table 1-1

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) Preliminary Design - Plan	7/1/2014	11/15/2014
System Integrator (INIT) Preliminary Design - Actual	7/1/2014	12/31/2014
System Integrator (INIT) Final Design - Plan	4/1/2014	2/1/2015
System Integrator (INIT) Final Design - Actual	4/1/2014	3/31/2015
Civil Design & Construction Validator Placement - Plan	4/1/2014	12/31/2015
Civil Design & Construction Validator Placement - Actual	4/1/2014	12/31/2015
Retail Network (Ready Credit) Preliminary Design - Plan	9/9/2014	12/15/2014
Retail Network (Ready Credit) Preliminary Design - Actual	9/9/2014	12/15/2014
Retail Network (Ready Credit) Final Design - Plan	12/15/2014	3/27/2015
Retail Network (Ready Credit) Final Design - Actual	12/15/2014	3/31/2015
Mobile Apps (GlobeSherpa) Preliminary Design - Plan	11/10/2014	2/1/2015
Mobile Apps (GlobeSherpa) Preliminary Design - Actual	11/10/2014	2/1/2015
Mobile Apps (GlobeSherpa) Final Design - Plan	2/1/2015	4/3/2015
Mobile Apps (GlobeSherpa) Final Design - Actual	2/1/2015	4/3/2015
Title VI Analysis Preliminary Review- Plan	11/1/2014	12/15/2014
Title VI Analysis Preliminary Review - Actual	11/1/2014	12/15/2014
Title VI Final Analysis - Plan	12/15/2014	9/30/2015
Title VI Final Analysis - Actual	12/15/2014	9/30/2015
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: Jan '12, Jan '13, Jan '14, Apr '14, Jul '14, Oct '14, Jan '15, Feb '15, Mar '15, Apr '15, July '15, Oct '15, Jan '16, Jan '17, Jan '18

Table 1-1 is a **summary** schedule of key eFare activities. Each Task Name shows the plan (original schedule) and actual (current schedule). Light green bars indicate on-time tasks, and red bars indicate tasks that took longer than previously scheduled. 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. As reported at the December 2014 TriMet Board Meeting, the red bars in this table illustrate the schedule impact when staff required INIT to resubmit several Preliminary Design documents fall 2014.

Project Financial Status as of 2/28/15

Regional Total Project Cost	$32.3 mil
TriMet Total Project Cost	$29.4 mil
Project to Date Expenses	$2.8 mil

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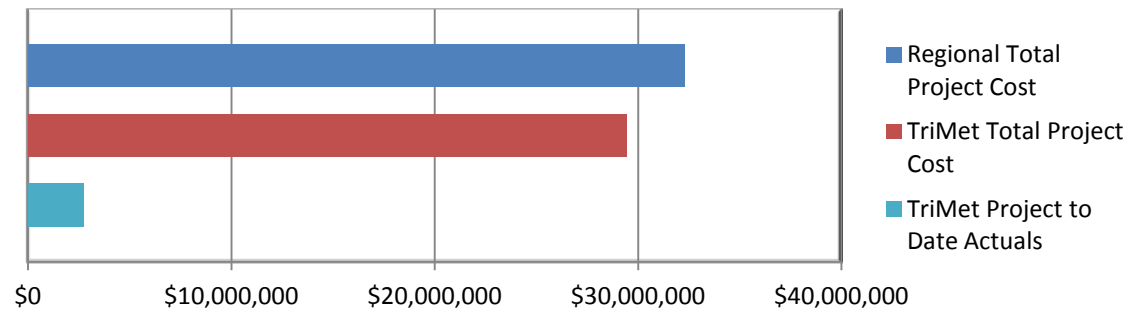
Mobile Applications

◈ Wrapping up GlobeSherpa's Preliminary Design Review for the new eFare account management app and fare inspection app
◈ Simplified design process as GlobeSherpa is using experience from its other projects

Back Office

◈ Completed **Final Design Review workshops** of INIT's validators, back end system and integration services. Staff completing final review of design, with approval anticipated within the next month.
◈ Design includes: All back office 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
◈ Began design of public eFare website, as well as the institutional website that employers, schools, agencies and others will use to administer eFare website design. Local website design firm is Brigade, a sub contractor to INIT.
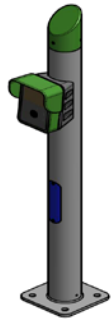
Retail Network

◈ We are in final design of the Retail Network with contractor Ready Credit Corporation, and now developing the APIs that will connect to the INIT back end.

Title VI

◈ Started Title VI Fare Equity Analysis outreach coordination with community-based organizations
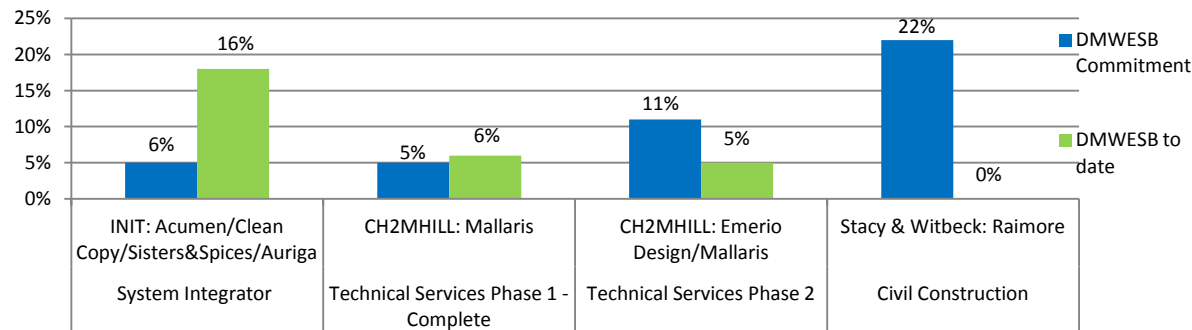
Rail validator

Validator Installation

◈ Civil construction underway laying the conduit for future installation of poles.

Branding & Public Outreach

◈ Completed the name and logo design with Branding agency, HMH, and will reveal soon. Staff will incorporate into the eFare systems, such as the validators, smart cards and retail store packaging.

◈ Continuing Public Education Campaign designed to increase general awareness of eFare program, such as eFare information during Honored Citizen Fare increase outreach.

DMWESB Update

Chart legend:
- ■ DMWESB Commitment
- ■ DMWESB to date

	System Integrator — INIT: Acumen/Clean Copy/Sisters&Spices/Auriga	Technical Services Phase 1 - Complete — CH2MHILL: Mallaris	Technical Services Phase 2 — CH2MHILL: Emerio Design/Mallaris	Civil Construction — Stacy & Witbeck: Raimore
DMWESB Commitment	6%	5%	11%	22%
DMWESB to date	16%	6%	5%	0%

DMWESB Planned To Date:

◈ Raimore - Civil
◈ Acumen - Integration Project Management
◈ GlobeSherpa - App Development
◈ 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

Highlights of Next Two Months

◈ Civil construction continues at several platforms region-wide
◈ Developing Application Programming Interfaces (APIs) for INITs back end system.
◈ Fabrication of rail validator poles near completion
◈ Title VI analysis outreach
◈ eFare branding: integrate name, color, logo with card and packaging design
◈ Website design continues
◈ Develop eFare TVM contract modification