TRI☺MET
Summary of eFare Activities
October 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 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

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 cost pressures noted in previous Board updates. Staff has now updated the project budget based on the latest civil and communication costs approved by the Board.

◈ **Publically launched the eFare brand – Hop Fastpass**
◈ **Completed Oracle back office software installation at geographically redundant data centers**
◈ **Approved all Design documents of INIT systems**
◈ **INIT has made significant progress on back office and validator software development**
◈ **Began development of Ready Credit systems for the retail network**
◈ **Development of INIT's Application Programming Interfaces (APIs) is over 95% complete**
◈ **Completed several civil construction activities at 90% of rail platforms, and have installed validator masts at 20% of rail platforms**
◈ **Wrapping up Final Design of GlobeSherpa developed mobile apps**
◈ **Development of Brigade website has begun**
◈ **Substantial completion of TVM contract for Board authorization in October**
◈ **Continuous focus on Disadvantaged Minority Women Owned Emerging Small Business (DMWESB) participation**
◈ **Began independent review and assessment of eFare development**

Key Challenge Staff is working on to Remain on Target

Staff has focused extra attention on finalizing the design of the GlobeSherpa developed account management app and fare inspection app. GlobeSherpa is lagging behind the initial schedule, so it hired a new technical project manager that has expedited the design review in recent weeks and is expected to catch up with the other eFare vendors during testing in 2016.
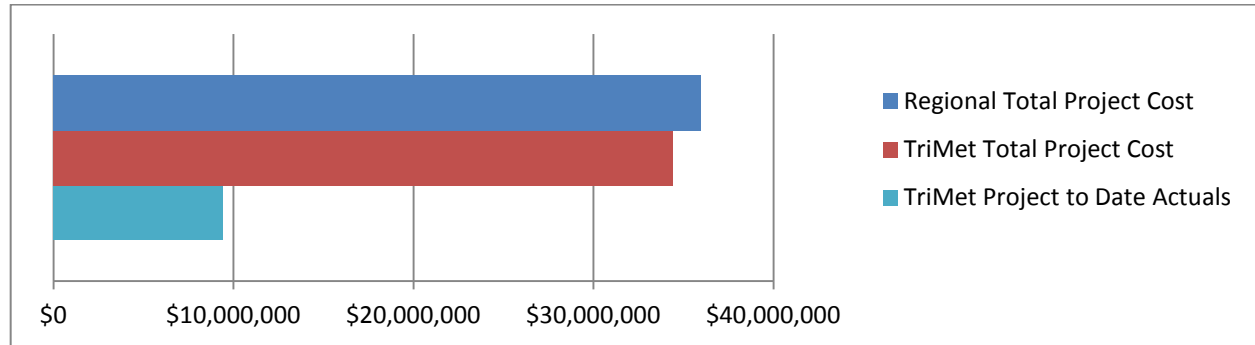
Table 1

Task Name	Start	Finish	Timeline
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	(gray) / (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) Preliminary 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	(green)
Mobile Apps (GlobeSherpa) Final Design - Actual	7/1/2015	10/30/2015	(red)
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)

Timeline header columns: Jan '12, Jan '13, Jan '14, Apr '14, Jul '14, Oct '14, Jan '15, Apr '15, July '15, Oct'15, Nov '15, Dec '15, Jan '16, Jan '17, 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. Despite a few areas of delay that will catch back up during testing in 2016, the overall project remains on schedule.

Project Financial Status as of 9/30/15

Regional Total Project Cost	$35.9 mil
TriMet Total Project Cost	$34.4 mil
Project to Date Expenses	$9.4 mil

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

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

Mobile Applications
◈ Wrapping up GlobeSherpa's Final Design Review for the new eFare account management app and fare inspection app
◈ GlobeSherpa hired a new Technical Project Manager to expedite design review and improve project oversight

Back office hardware

Back Office
◈ Completed Oracle software installation; significant development of INIT back office software has occurred
◈ 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 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
◈ Started Title VI Fare Equity Analysis outreach training with community-based organizations

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 began September 2015

Branding & Public Outreach

◆ Staff is building the branding plan to incorporate 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 the release of the Hop Fastpass brand and information at myhopcard.com, as well as program information provided with platform construction notifications
◆ Continuing to develop partnerships with community organizations and other stakeholders to determine most effective strategies for engaging and educating our riders.

DMWESB Update
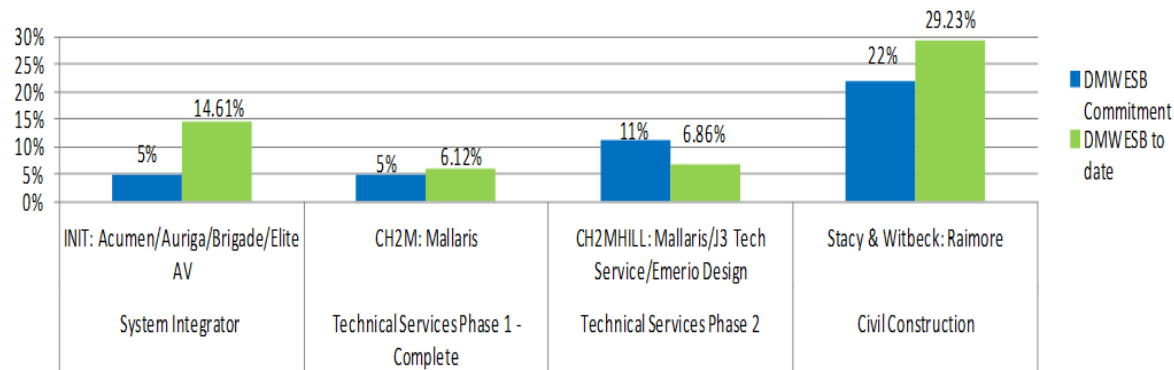
DMWESB Planned To Date:

◆ Raimore - Civil
◆ Acumen - 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
◆ Brigade – Website Design
◆ Elite AV – Equipment Installation
◆ DL Engineering – Construction Oversight
◆ J3 Tech Services – Installation Oversight

Highlights of Next Two Months

◆ Factory Acceptance Testing of INIT back end software and eFare validator
◆ Civil construction continues at several platforms region-wide, including pulling cabling
◆ Installation of several dozen masts at rail stations
◆ Complete installation of validator cabling on buses and at many rail stations
◆ Near completion of website development; complete design of mobile apps
◆ eFare TVM contract award