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**EXECUTIVE MANAGEMENT AND AUDIT COMMITTEE  
OPERATIONS COMMITTEE  
OCTOBER 18, 2007**

**SUBJECT: TRANSIT ACCESS PASS (TAP) STATUS**

**ACTION: RECEIVE AND FILE**

**RECOMMENDATION:**

Receive and File the implementation status of Transit Access Pass (TAP).

**ISSUE**

As TAP makes incremental progress on delivering “seamless travel” for regional customers, TAP staff was asked at the September Operations Committee to provide detailed status of project milestones and deployment activities.

**DISCUSSION**

There are five key areas that will be covered on a monthly basis:

1. Metro’s equipment contract with Cubic
2. Municipal Operator Equipment Contract with Cubic
3. Cubic’s Regional Central Computer
4. Metro’s TAP contract with ACS
5. Status of Director Fasana’s January 2007 Motion

The following discusses these five areas noted on the attached Regional TAP schedule:

**1. Metro’s Equipment Contract with Cubic**

Installation of the Universal Fare System (UFS) equipment on Metro’s bus and rail fleet was completed in May 2006 to allow limited use and testing of new TAP smart card capabilities on bus fare boxes and rail ticket vending machines. Working with Communication’s staff responsible for college and vocational school pass programs, the TAP team introduced an Institutional Pass (I-TAP) a controlled segment of UCLA students, faculty and employees to participate in a “pilot” program over 12 months ago. The program was successful and has continued through this new academic year.

Other college programs implemented by Communications staff such as those with Rio Hondo College and soon, LACC, are currently issued "I-Pass", a plastic "flash pass". To avoid patron and operator confusion, we are working with Communications staff over the next several months to ensure the conversion of all institutional pass programs to TAP.

The TAP implementation schedule was suspended from May to July 1, 2007, as TAP staff focused complete attention towards the successful conversion of Metro's new fare structure. The reprogramming of software and device hardware in rail ticket vending machines, rail validators, and bus fare boxes in a very narrow time frame was a major undertaking that required significant level of effort by TAP staff with technical oversight and assistance by our consultants and contractors.

Other activities during the first quarter FY08 have included the preparation for the pilot launch of TAP sales devices with Foothill Transit, LADOT and Metro Wilshire Customer Centers. Customer service agents at all three transit agencies required training on new devices with new operating procedures developed by TAP staff. TAP staff are responsible for the technical programming, testing and installing new TAP devices at different locations. Metro Communications staff are responsible for preparing marketing materials with regional Muni participants through an established Market Exchange Committee headed by Communications. This pilot with the first three transit agencies will be a crucial test of TAP sales equipment performance. All future regional TAP smart card fare media will be sold and re-loaded utilizing this same device. Currently, Foothill Transit, LADOT and Metro Wilshire Customer Centers will sell 2,000 Metro Monthly passes on TAP, the first "launch" with random customers to test the sales equipment and begin regional staff training of new processes on smart cards.

## 2. Municipal Operators Equipment Contract with Cubic

The following Municipal Operators (Munis) are on contract with Cubic and have procured compatible UFS/TAP equipment with funding allocated for this acquisition through the Regional Transportation Alternatives Analysis (RTAA 1998):

Municipal Operator	Status
Antelope Valley Transit	Currently in process of contract modifications. Working on equipment configuration to support commuter service with TAP "stand-beside" units.
Culver City Bus	Culver City will be the next Municipal Operator to install TAP compatible fare boxes. Coordination meetings, site visits, Cubic technical installation submittal reviews and technical oversight are being done directly with Metro's TAP office to ensure smooth transition for Culver City. Currently, the winter of 2007 is when Culver anticipates their "cut over" to TAP. They will be the first Muni to convert their existing Metrocard magnetic system to TAP passes system-wide. Being primarily a cash-based system

	(rather than a pass based system like Metro), Culver will implement a TAP debit purse simultaneously. Seniors and students using Culver CityBus currently are offered magnetic cards for regular use and this will be transitioned to TAP concurrently with their installation of UFS fare boxes.
<b>Foothill Transit</b>	Currently in process of contract modifications. Technical specification being developed to accommodate rear door boardings through a new Driver Control Unit and Light Validator.
<b>Gardena Municipal Bus Lines</b>	Currently in process of new facility construction and relocation. Will wait until construction completed.
<b>LADOT</b>	Currently in process of operational business planning. Also requires additional equipment with funds earmarked in Local Transit Services System (LTSS) funding source to support fleet expansion. Waiting to obligate necessary funds through LTSS process.
<b>Long Beach Transit</b>	Has installed UFS compatible equipment and is waiting to deploy TAP after full regional operations has been kicked off.
<b>Montebello Bus Lines</b>	Expressed readiness to move ahead next after Culver City. Examining conversion of magnetic Metrocard to TAP. Challenges related to organizational changes at agency.
<b>Norwalk Transit</b>	Discussions on business and operational rules in process. Also needs planning to transition magnetic infrastructure to TAP.
<b>Santa Clarita</b>	Santa Clarita successfully completed their fare box installation in August 2007. Metro staff and Booz Allen provided hands-on technical assistance and oversight. Coordination meetings, site inspections, design documentation review and response to Cubic were done with Metro TAP staff to ensure all integration and configuration of Santa Clarita's system was in accordance to the Regional UFS specifications. Santa Clarita is

	currently in full revenue operation on cash.
<b>Torrance Transit</b>	Changes in organization (vacancies in key areas) have caused some challenges, however, Metro TAP staff are assisting with coordination of their installation planning.

The following operators have “earmarked” funding that has not yet been obligated, or has been obligated and distributed, as follows:	
<b>Santa Monica Big Blue Bus</b> (funds set aside, not yet obligated)	RTAA funding has been earmarked; BBB staff are evaluating options for TAP capabilities. New magnetic upgrades recently completed to their system will likely remain when TAP is interfaced.
<b>Access Services, Inc. [ASI] –</b>	Metro and ASI staff have been pricing different options to allow ASI participants to “tap” on fixed route services.
<b>Metrolink</b>	\$8 million was distributed. Metrolink is exploring ways to become TAP compatible.

In addition Local Transit Service Systems (LTSS) operators have \$4 million earmarked out of the original \$5 million. In 2005, \$1 million was contributed from this source of funding towards the Regional Central Computer, since all future LTSS participants will require this as their back office system for participating in TAP.

### 3. Cubic Regional Central Computer

The Regional Central Computer is in its final engineering and design phases at Cubic. The servers are located at San Diego’s Cubic facility and are undergoing extensive testing to support all regional Muni participants and Metro to deploy the TAP card. The regional computer must support financial clearing between operators. This capability is undergoing major design reviews with Metro’s consultants serving as the region’s technical oversight experts. Sound systems integration and engineering to support all regional TAP participants is a critical function of this computer.

Cubic will be ready to begin testing of this system with Municipal Operators and Metro in Spring 2008. Regular updates will be provided as progress continues. (Metro’s Central Computer supports all current TAP functionality.)

### 4. Metro’s TAP Contract with ACS

Since 2006, TAP staff have directed ACS pre-revenue start up on all three TAP programs currently in operation: A-TAP, B-TAP, and I-TAP. Under the direction of TAP staff ACS has activated the 1.866.TAPTOGO (1.866.827.8646) regional call center. In addition, they will be supporting the sales device pilot with Foothill Transit, LADOT and Metro Wilshire’s Customer Service Center with 2,000 regular Metro Monthly pass riders.

ACS achieved a major milestone by relocating from Metro's 4<sup>th</sup> floor TAP office, to their new location at 707 Wilshire Boulevard. This will be the permanent facility for ACS operations.

In addition, they will be testing their interfaces to the Cubic Regional Central Computer next month. Status of this will be reported in subsequent reports as progress continues.

### 5. Status of Director Fasana's January 2007 Motion

Director Fasana introduced a motion in January 2007 to convert paper passes to TAP. Current status is provided below:

	Director Fasana Motion	Status
1.	Direct staff to immediately begin conversion of Metro Dependents passes (approximately 11,000) to TAP smart cards.	HR is confirming eligibility of dependents. Once this process is completed, TAP dependent badges will immediately be released.
2.	To immediately begin conversion of Metro Retiree passes (approximately 3,500) to TAP smart cards	HR is confirming eligibility of retirees. Once this process is completed, TAP retiree badges will immediately be released.
3.	To complete conversion of Metro Annual and Business passes (approximately 2,000)	<p>TAP staff converted the 2,000 Annual and Business flash passes to TAP. TAP staff will continue to work with Communications staff as they add new employer program clients. Currently, over 5,000 A-TAP and B-TAP have been issued to this group and are actively being used on Metro bus fare boxes and rail ticket vending machines.</p> <p>A-TAP and B-TAP are used as flash passes with LADOT under the current pass reimbursement agreement established by Communications staff. Placing stickers on these smart cards served as a temporary "stop gap". LADOT's pass reimbursement agreement with Metro is set to expire in January 2008, at which time stickers will also be eliminated.</p>
4.	To implement Metro Mail customers (approximately 5,400 monthly paper flash passes)	<p>The TAP implementation schedule for Metro Mail was suspended from May to July 1, 2007, as TAP staff focused complete attention towards the successful conversion of Metro's new fare structure. Work on Metro Mail conversion has since resumed.</p> <p>Several issues have historically presented challenges and are being addressed such as:</p> <ul style="list-style-type: none"> <li>• Communication staff are currently validating the fare media database to ensure TAP staff can support the multiple fare media products to be converted to TAP, i.e., paper passes, tokens, and stickers</li> <li>• In subsequent TAP updates, we will develop a time line to convert all remaining Metro passes, including seniors,</li> </ul>

		students, LACTOA, etc.
5.	And to implement Metro Corporate customers (approximately 6,000 monthly paper flash passes)	<p>Communications distributes Metro fare products to large corporation who sell Metro paper flash passes to their employees at their work locations.</p> <ul style="list-style-type: none"> <li>• Successful “pilot” of the sales devices currently underway at Foothill, LADOT and Metro Customer Centers will be a key component for the conversion of such corporate customers, since these corporate locations will also use this device.</li> <li>• Metro Monthly passes will be the first of the paper fare media to convert to TAP.</li> </ul>
	Develop a schedule of the conversion of all remaining Metro passes and fare products	Future TAP Updates will describe the steps necessary to convert all categories of Seniors, Medicare/LACTOA, K-12 students, vocational and college, EZ pass (Senior and Regular), and other passes. A complete analysis of the numbers by each pass type by rider category (Senior, Regular, Student, etc.) and distribution outlets is in progress.
	Report back to the Board in each Monthly UFS/TAP Update, the status of these conversions totaling almost 40,000 passes to TAP	On going regular updates will continue both in oral and written format.

**NEXT STEPS AND NEXT MAJOR MILESTONES**

**Muni Installation - November 2007 – December 2008**

The Muni implementation status by operator is noted on the table above. Due to the varying operational needs of each Muni operator, a specific “date” will be determined over the next several months. Metro TAP staff continue to provide assistance with Muni installation planning.

**Base Contract Close-out January – March 2008**

Staff anticipates close out of the base contract over the next several months. Punch list items are being closed out. Staff will provide a more detailed analysis by November, when further progress on this activity can be provided. The project remains within the established Life of Project Budget.

**2008 – 2009 Vendor and Regional Customer Center TAP deployment**

Staff’s major “project” to complete over the next 2 years will be the replacement of the manual paper based fare media sales infrastructure to that supported by TAP devices. Over 600 retail vendors sell Metro pass media. TAP staff is working with Communications staff as we begin the “pilot” of the first three transit-operated Customer Centers this month with Foothill Transit, LADOT and Metro’s Wilshire Customer Center as the beginning of this conversion of the retail sales network that will support TAP sales

With successful pilot and deployment of this from October to December 2007, staff will develop a specific plan to convert retail operations to TAP sales devices.

## **New Developments**

A recent development with TAP focuses on various bank card issuers and commercial banks to support a broad base of retail and parking opportunities available through Metro's Transit Oriented Development (TOD) projects. Due to non-disclosure agreements in place, such pilot opportunities are being evaluated by Metro's legal staff. Once clear determination has been made on several potential revenue generating models that are being explored, a comprehensive report will be provided.

TAP staff is making further progress with the Metro Rail Gating Analysis. The contractor engaged to determine fare evasion counts has begun work to meet the October 2007 Board cycle schedule.

## ATTACHMENT(S)

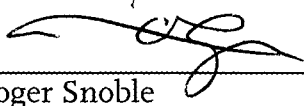
A. Regional TAP Schedule

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Roger Moliere, Chief, Real Property Management & Development



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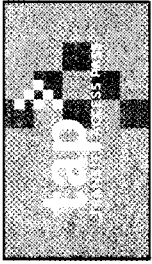
Roger Moliere  
Chief, Real Property Management & Development



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Roger Snoble  
Chief Executive Officer





# TAP Regional Schedule

