

REVISED  
Finance & Budget Committee Item 20  
January 14, 2009  
Operations Committee Item 44  
January 15, 2009

# Paper Day Pass Transition to TAP



# Background

- ▶ Metro's Management Audit Services department (MASD) determined that better internal controls of paper Day Passes at all bus divisions were needed to reduce embezzlement.
- ▶ In addition, the longer term solution recommended by MASD was to accelerate the implementation of TAP to reduce fraud and to remove revenue assets from the bus operating environment.
- ▶ In October 2008, the Board directed staff to address both issues and return with a recommended implementation plan in January 2009.

## Description of Current Paper Day Pass Rider on Bus

- ▶ A cash paying customer who must purchase the fare media on a bus at the time of boarding
- ▶ Must present exact change (or lose the difference)
- ▶ Bus operator tears off paper ticket from stapled booklet and sells to customer with verification of senior or regular fare status
- ▶ Bus operator pushes the correct fare box button to classify Day Pass sold – either a senior or regular fare rider
- ▶ Customer carries it throughout the day and bus operators continue to visually inspect the ticket to manually classify each boarding
- ▶ Paper ticket is thrown away at the end of the day

## Description of future TAP Day Pass Rider on Bus

- ▶ Customer receives first introductory TAP card for free with purchase of a Day Pass on board the bus during initial campaign March 15 – April 11, 2009.
- ▶ Customer inserts exact change, or will have “stored value” TAP debit card to eliminate cash handling to pay for Day Pass.
- ▶ Bus operator manually classifies first sale and customer “TAPs” card to load the Day Pass from the fare box
- ▶ All subsequent boardings with TAP are automatically validated on the fare box
- ▶ Bus operators no longer need to classify each boarding or visually inspect unless special circumstance
- ▶ Customers keep their TAP card to re-use it for next use.

# TAP Day Pass Objectives

- ▶ Address removing Day Passes from divisions, per Audit directives
- ▶ Distribute TAP cards into the hands of cash paying Day Pass customers as quickly as possible
- ▶ Eliminate printing and distribution of paper day passes.
- ▶ Ensure the RE-USE of TAP cards by customers
- ▶ Ensure minimal impacts to Transit Operations, particularly to bus operators

# TAP Day Pass Goals for Transition

1. Minimize the transition period to reduce bus division and operator impacts
2. Educate the public in advance
3. Promote the benefits of TAP Day Passes not available on paper

# 1. Minimize impacts to Transit Operations

## ▶ Training Bus Operators

- Operations Central Instruction has started training this month, January 2009, for a systemwide launch between March 15 – April 11, 2009

Purpose:

- Eliminate issuance of paper Day Pass “tickets” at divisions and on board buses
- Relieve bus operators from visual inspection and manual classification of day pass usage

# 1. Minimize impacts to Transit Operations - continued

- ▶ Remove “revenue assets”, or Day Passes from divisions
  - Once the four week campaign is completed, Day Passes will no longer be stored nor issued from bus divisions

Purpose:

- Eliminates the asset controls and reconciliation procedures that are difficult and impractical to maintain on a daily basis at bus divisions
- Eliminates revenue asset handling by division personnel and bus operators (embezzlement potential removed)



## 2. Educate the Public in Advance

- ▶ Marketing is developing campaign materials to support this initiative
- ▶ Visual aids to illustrate the elimination of paper “tickets” changing to plastic TAP cards
- ▶ Passenger “take ones” to inform and educate the customers on the re-use of TAP cards
- ▶ TAP cards will be issued for free during the March 15 – April 11 transition period with the purchase of a day pass on board buses
- ▶ Cash will always be accepted on board buses for payment of base fare for customers who choose not to use a TAP card

### 3. Promote the Benefits of TAP Day Passes

Market and Advertise the Benefits to Customers:

- ▶ TAP eliminates need to carry exact change to buy Day Passes
  - A stored value TAP card eliminates this inconvenience
  - Accelerate stored value implementation to accommodate 80% bus riders
- ▶ Customers can go to retail outlets to load and re-load Day Passes in advance
  - Current Day Passes can only be purchased on first boarding of buses
  - TAP day passes will be sold in advance at all retail outlets
  - Up to EIGHT day passes can be purchased in advance
- ▶ TAP cards can be protected if lost or stolen – paper Day Passes cannot

### 3. Promote the Benefits of TAP Day Passes - continued

Benefits to Bus Operators and to Metro at large:

- ▶ Bus operators can focus on driving without worry of selling multiple fare media on board their vehicles.
  - Municipal operator transfers and zone checks will continue to be sold as paper tickets
- ▶ With a stored value (debit) TAP card, boarding speed is improved.
- ▶ Bus operators must visually inspect each paper Day Pass, whereas TAP is automatically validated on the fare box
- ▶ TAP is “GREEN” – avoids throwing away millions of pieces of paper each day

# TAP Transition Schedule

Responsible	Task	Schedule
Transit Operations OCI	Bus Operator Training	End of January – March 2009
TAP Operation	Order dispensers, TAP cards, coordinate with Transportation and Maintenance management at each divisions	On-going
Bus Divisions	<p>Maintenance – adhere dispensers to fare boxes</p> <p>Transportation – coordinate storage and issuance of pre-packaged “no value” blank TAP cards; re-cycle unused cards</p> <p>Bus Operators – hand out “take ones” with paper Day Passes to inform/alert patrons in advance</p> <p>Issue TAP cards to load day passes and “take ones”</p>	<p>March 1 – 15</p> <p>March 8 – 14; March 15 – April 11</p> <p>March 1 – April 11</p> <p>March 15 – April 11</p>
Communications - Marketing	Prepare and roll-out bus cards, “take ones”	February – April

# Fare Boxes with Dispenser



**Dispenser is mounted to  
Back of fare box facing  
the bus operator**