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REVISED
OPERATIONS COMMITTEE
APRIL 16, 2009

SUBJECT: TRANSIT ACCESS PASS (TAP) & RAIL FARE GATE STATUS

ACTION: RECEIVE AND FILE

RECOMMENDATION:

Receive and file report on the Transit Access Pass (TAP) and Rail Fare Gate Status

ISSUE

TAP staff was directed to provide a regular status update of project milestones and deployment activities on the Transit Access Pass (TAP®) regional smart card. Also, with the inception of the Metro Rail Fare Gate project, staff was directed to report monthly on the progress of this project. This report serves to fulfill these requests.

DISCUSSION

There has been significant progress on TAP regional implementation:

- **Municipal Operators** - Culver CityBus and Santa Clarita Transit have successfully migrated their UFS systems with full TAP capabilities. Norwalk successfully installed UFS fareboxes with TAP capability on April 3. Foothill, Gardena, and Montebello are in the process of conversion between May and June, 2009.
- **Reduced Fare TAP** - Over 60,000 Senior, Disabled, and College/Vocational TAP cards have been produced and mailed to applicants.
- **Day Pass** – TAP cards, equipment, and supplies delivered to divisions for scheduled day pass conversion to TAP on March 15. At the point of writing this Board report, the conversion process has gone fairly uneventfully with the exception of card volumes requiring replenishment at bus divisions since customer education and training to re-cycle cards on subsequent usage needs further reinforcement.
- **Metro Pass Sales Outlets** – compact point of sales devices have been installed at over 400 pass sales outlets and additional devices are currently being installed at Cities and Senior Centers. With the assistance of the Community Outreach staff, multiple presentations and “on-site” conversion of paper Senior passes to TAP have been completed. Coordination with the outreach efforts to ensure awareness at cultural and community centers has been well received.
- **TAP Regional Center** – interface between Cubic’s Nextfare database and the TAP Regional Center TransiTrack computerized pass processing system operated by ACS was finalized with system launch on February 20, 2009. This ensures a seamless system to handle regional

customer calls, and will be adapted to accommodate Metrolink passengers when their system has been adapted to meet their fare policy changes occurring with transfers accommodated by Metro and Muni operators.

- **Fare Inspections** – quantity of fare inspections on rail doubled to over 8,600 for February. The data shows that while the majority (more than 90%) of those checked actually have valid fare media loaded on their TAP cards, patrons riding our rail system do not bother to tap.

Specific topics related to regional TAP implementation are summarized as follows:

1. Status of Implementation Schedules

“Attachment A” is TAP Operation schedule provides high level schedules of the Regional Computer and Municipal Operator Schedule, Metro’s TAP Fare Products Rollout Schedule, and Metro Rail Gating Schedule.

1.a. Cubic’s Regional Computer & Municipal Operator Schedule

- After migration of the Regional Central Data Computer System (RCDCS) in August, TAP staff initiated extensive testing and began processing current data.
- Santa Clarita and Culver City have migrated their live data to achieve “interoperability” on the regional computer.
- A settling period will allow for continued validation before subsequent Municipal Operators (Munis) begin integration on the regional “back office” system.

1.b. Metro’s TAP Roll-Out Schedule

- Conversion of reduced fare riders (Senior, Los Angeles County Transit Operators Association (LACTOA/Disabled), Students) is currently under way.
- Over 18,000 senior, reduced fare applications were received by the end of February 2009. As of March 15, more than 22,000 senior and 35,000 LACTOA cards were issued. There are some pending applications to be reviewed for completeness and eligibility. This campaign is expected to be well into TAP transition by June 2009.
- Beginning May, and throughout the summer, students K-12 will begin the conversion of their student passes. We are working with Metro’s community outreach staff to work with the individual schools, and assist them directly through the application process. In order to avoid delays for students to get their cards immediately and prior the receipt of their permanent cards not bearing their personal photo, a temporary card will be issued from any customer center. The application process for TAP ensures that students will have balance protection if the card is lost. There is also better fraud protection from misuse of current student passes which are photo-less, unregistered, and not personalized (does not bear name of student). Students in grades 9 – 12 will be required to carry valid photo ID issued from their school or equivalent.

1.c. Metro Rail Gating Schedule

- Design requirement work for rail station gating is continuing with Booz Allen Hamilton providing technical oversight.
- Initial installation activity is underway for the Eastside Extension underground stations at Soto and Mariachi for installation of the first gates in time for Revenue Operation.
- Civil Work including development of the “concept of operations” for the Closed Circuit Television (CCTV) and public telephones to assist patrons at gates is under development with

- Pre-revenue testing will begin in coordination with Rail Operations' start up schedule. The TMVs, SAVs, and gates will undergo pre-revenue testing which has started in the San Diego test lab, and proceed to Metro's test lab as we field the all the TAP equipment for Metro Gold Line Eastside Extension.

2. TAP Usage Data

A critical performance indicator of TAP reliability is monitoring the use of TAP cards in Metro's bus and rail system. From March 2008 through February 2009, about 34 million TAPs have been recorded systemwide on Metro's bus and rail system.

The most significant milestones are noted below:

- Over 5.0 million "taps" were recorded in February.
- Metro Monthly pass "taps" declined slightly to 1.65 million.
- Metro Weekly pass "taps" increased to over 2.56 million.

As more retail merchant pass sales locations and other pass types are converted from paper to TAP sales in the coming months, there will continue to be an increase in the total "taps" captured on the Metro bus and rail systems.

3. TAP Sales Activity

Five types of Metro passes are currently sold to the general public on TAP – Metro Monthly, Metro Weekly, Senior, LACTOA/Disabled, and College/Vocational passes. The locations selling these Metro passes increased to 391 outlets in all Metro service areas by late February.

The most significant issues regarding TAP sales activity are noted below:

- TAP monthly pass sales increased slightly from 24,967 to 25,333 in February.
- TAP weekly pass sales increased from a high of 30,334 during the 4th week of January to 32,152 during the 4th week of February.
- Sales of monthly TAP passes from Metro Ticket Vending Machines increased by another 11% in February, with a total of 4,638 passes being purchased from all TAP devices.

4. Municipal Operator and Metrolink Update

Santa Clarita and Culver City data was successfully migrated to the Regional RCDCS. Four other municipal operations are in various stages of conversion to TAP. Due to municipal operator requests for technical support, TAP Operation is recommending technical oversight from Booz, Allen, and Hamilton on behalf of the municipal operators and local transit system subcommittee (LTSS). This was approved at the March 2009 Board meeting.

The following is the status of current, significant Metrolink and Municipal Operator TAP transition activities:

- Metrolink – In August, the Metrolink Board approved proceeding with fare strategies development for TAP implementation. A Memorandum of Understanding (MOU) was developed between Metrolink and us. A recommendation for Booz, Allen, and Hamilton consultant oversight services was approved at the March Metro Board meeting to support this integration effort. Metrolink has been working with Metro staff for over 12 months to

develop options on addressing changes to their fare policies that require reimbursement to the county's regional operators including Metro for transfers taken by Metrolink riders. Whereas the former reimbursement agreement was established at one-half of the bus agency's base fare, the region approved a new reimbursement rate that took effect this year, requiring a new rate of reimbursement for the full base fare.

As a result, Metrolink recommended to their Board that transfer credits be given to their patrons for only specific fare products sold to their customers with high degree of transfers taken on the county's bus operators and Metro. Recently, the Metrolink Board approved that such transfer credits be provided for their 10 Trip and Monthly pass riders, and that such credits will be loaded onto the TAP smart card so that their customers can transfer seamlessly to ride either Municipal carriers or Metro bus and rail. This use of fare policy options tied to their own fare restructuring avoids costly engineering modifications to their existing fare collection infrastructures and permits their riders to use TAP on connecting boardings, including passage in and out of Metro's new rail gates.

- Culver City Bus - Culver City Bus was the first Municipal Operator to "cut over" their system to full TAP functionality in early 2008. In January 2009, Culver City Bus data was migrated from the Metro Central Computer to the Regional Central Computer system. They have been working closely with Metro and will likely assist new Muni operators who will also implement TAP to address operational issues.
- Santa Clarita - Santa Clarita completed their fare box installation in August 2007 and migrated to the RCDCS on December 1, 2008. TAP functionality will be added to their fare options in July. Discussions are on-going with them to assist in the migration of their 20 trip pass to a stored value TAP card. Booz Allen and Metro staff will continue to provide technical assistance through this transition.
- LADOT - With the approval of the Board action in March 2009, LADOT will have ability to utilize Booz Allen consultant support to technically specify their "bus stand beside" unit. Additional equipment quantities for fleet growth have been addressed. Their staff need technical assistance to cut-over 10 bus garages operated by their contractors, and to ensure that their fare tables and tariff rules have been properly captured in the Regional Central Computer. Booz Allen and Metro will continue to assist.
- Norwalk Transit - Norwalk is the newest TAP-enabled Muni operator as of April 3. Meetings have occurred since early September on the transition of Norwalk Transit including providing them with bus car cards, brochures and training materials. Regular weekly meetings between Norwalk staff, Booz Allen consultants, Cubic and Metro staff have been on-going. They are now in revenue service with the new TAP stored value card, that transitioned from their old magnetic Metrocard.
- Foothill Transit - The Foothill Transit Board of Directors provided final approval of the transition to TAP in late 2008. TAP Operation staff is currently hosting weekly meetings to review implementation tasks for migration to TAP. The tentative schedule has Foothill converting to TAP in early May 2009. Metro staff and Booz Allen consultants will closely monitor the fare table development and tariff rules to accommodate their transfer policy. Foothill Transit has stated that riders transferring locally will likely need a TAP card.
- Gardena Municipal Bus Lines - The current schedule has Gardena converting to TAP in June 2009. TAP Operation staff and Booz Allen consultants are meeting with Gardena through bi-weekly meetings that are held to discuss implementation tasks for migration to TAP. As they completed the construction of their new facilities and prepare for fleet expansion, TAP will be integrated to their complete service operation.

- Montebello Bus Lines – TAP Operation held meetings with Montebello to begin activities required for transition of TAP. The tentative schedule has Montebello converting to TAP in early July 2009. They will require Metro and Booz Allen assistance to technically specify the use of limited use paper smart cards for their current Day Passes. Operational rules, and local tariff regulations will determine how this is deployed.
- Torrance Transit - TAP Operation staff has met with Torrance Transit to begin planning for transition of TAP. Additional planning meetings are anticipated to review potential additional fare boxes and integration of their new AVL system, currently in the procurement phase. We will continue to assist and coordinate their full TAP transition as their operational needs are identified.
- AVTA – TAP Operation staff are developing changes to their original contract to support new fare boxes instead of the “stand beside” units that were originally purchased. TAP staff will provide coordination effort with Booz Allen to ensure contractual changes reflect compatible architecture to support regional TAP acceptance in their system. AVTA has expressed an interest to be converted to TAP in late summer 2009.

5. Regional TAP Service Center Status

Since 2007, the TAP service center has been supporting TAP customers using I-TAP, A/B-TAP, TAP card holders with Metro monthly/weekly passes and third party retail merchant locations. The deployment of the 1.866.TAPTOGO number and TAPTOGO.net website has also facilitated customers seeking assistance to register for “balance protection” for lost or stolen cards. A summary high call volume issues from cardholders is shown below:

- The preponderance of calls (918) shifted away from cardholders seeking assistance with user questions to customers trying to find out how to get a TAP card.
- The second highest call volume (630) was for cardholders seeking assistance with user questions to better understand TAP fare rules and fare policies.
- Customers with balance protection inquiries were the third highest area with 347 calls.

Bus car cards, rail advertising inserts, “Take Ones”, and other marketing campaigns will assist customers; however, calls are expected to increase with continued TAP expansion then decrease as marketing efforts train customers on use of the new system.

6. Metro Rail Gating Status

The gating project is divided into four separate and inter-connected teams. The details on the status of each of the teams is shown below:

Team 1 – Technical Integration

- System testing of the RCDACS is underway.
- Conditional approval of the gating functional requirements has been achieved.
- Metrolink impacts to gating have been simplified to only reflect transfer credits issued to their riders on TAP cards. This will facilitate ease of use through fare gates.

Team 2. Civil Work

- Equipment layout drawings for Blue Line have been resubmitted and are under review.
- Equipment layout drawings for Gold Line have been resubmitted and are under review.
- First set of Exit Calculations analysis submitted to Fire Life Safety for review.

Team 3. Maintenance

- Contractor presented their proposed services agreement to Metro.
- Metro reviewed the proposed services agreement to determine the best service options.
- This has been approved through prior Board action and is completing final negotiations with County Counsel's assistance.

Team 4. Lease

- The lease agreement was approved and signed in December.
- Metro consultants are continuing to work with County Counsel in structuring a master agreement that includes the Eastside Extension and Exposition Line.

NEXT STEPS

- Continue processing reduced fare TAP cards (Seniors, LACTOA, students) and rollout of reduced fare products through end of 2009.
- Deploy marketing campaigns to improve public awareness, including websites for Internet/Intranet.
- Report on the paper day pass transition (cessation of paper) to TAP in May 2009.
- Begin pre-revenue testing of fare gates at the Mariachi/Soto station.

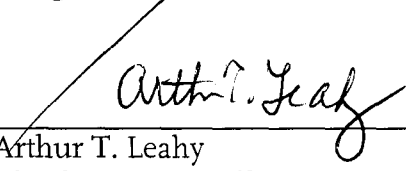
ATTACHMENT(S)

A. TAP Operation Schedules

Prepared by: Jane Matsumoto, DEO TAP Operation
Roger Moliere, Chief Real Property Management and Development



Roger Mollere
Chief Real Property & Development

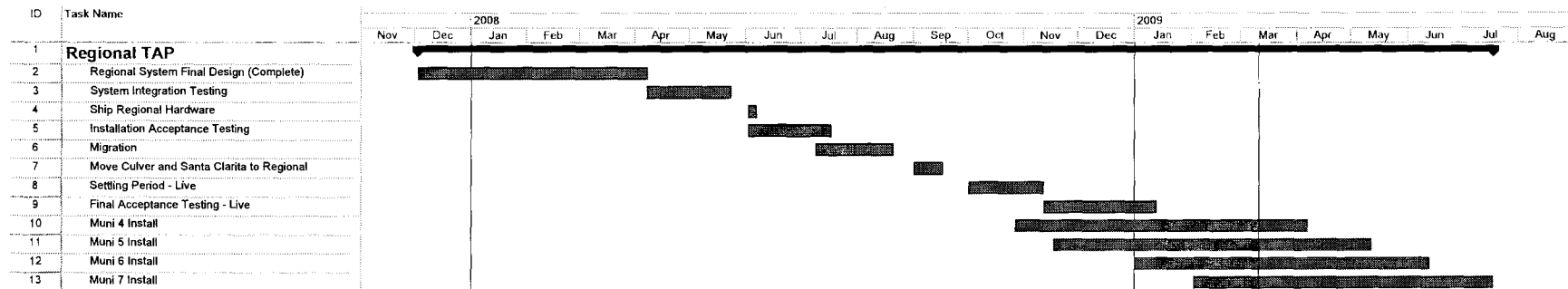


Arthur T. Leahy
Chief Executive Officer

ATTACHMENT A

Cubic's Proposed Regional Computer & Municipal Operator Installation

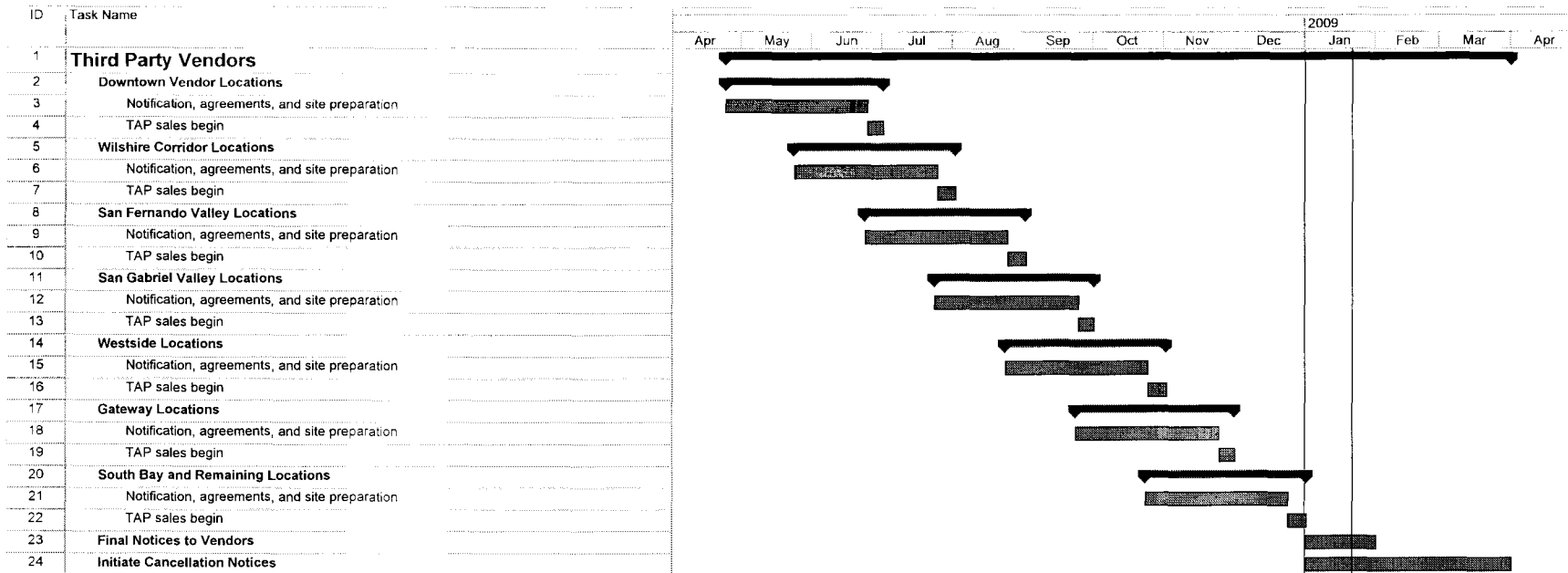
Metro TAP Operation and Regional TAP Service Center staff have completed system integration testing and training for the regional central computer. Metro, Culver CityBus and Santa Clarita Transit and most recently, Norwalk Transit, have successfully migrated to the regional central computer. Installation preparation has begun for the next three municipal operators – Foothill Transit, Gardena Municipal Bus Lines, and Montebello Bus Lines for installation in May, June, and July 2009.



ATTACHMENT A

Third Party Vendors TAP Sales Device Installation Schedule

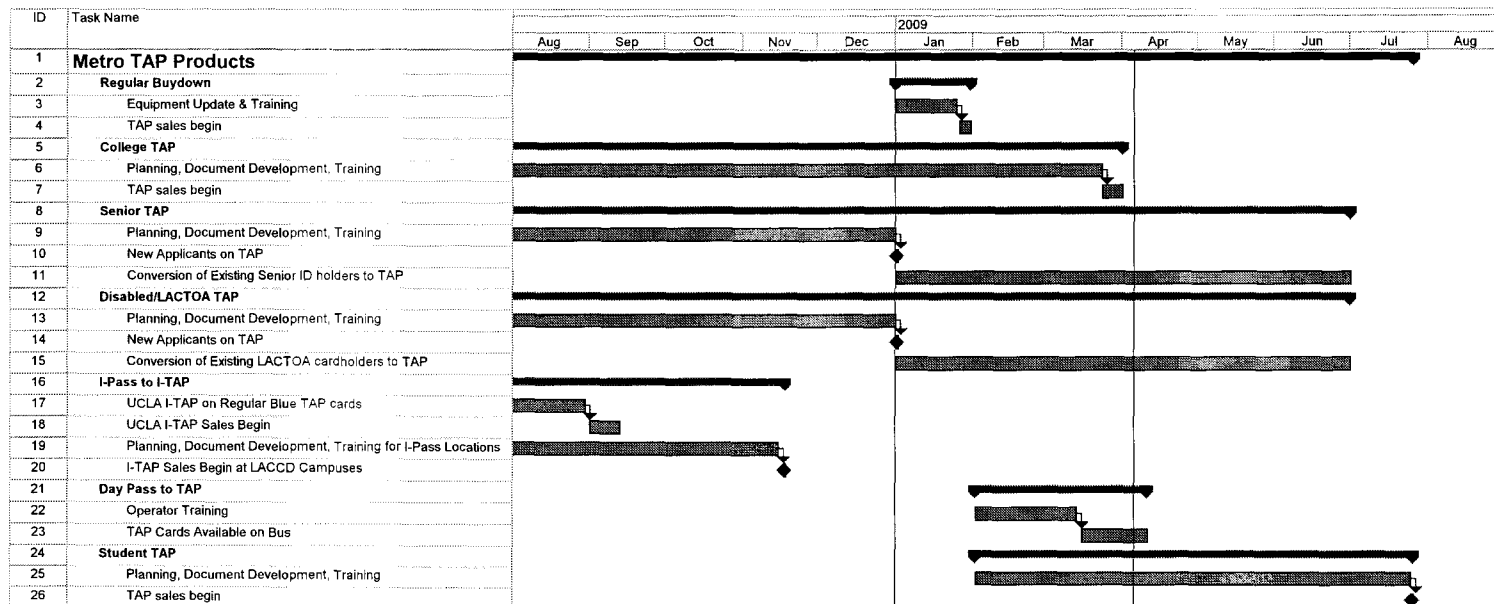
Metro TAP Operation and Customer Communications staff, in conjunction with the Regional TAP Service Center, has nearly completed the TAP conversion process for Metro third party vendors. To date, all vendor regions have been converted to TAP sales of the Metro regular monthly and weekly passes. More than 400 outlets are currently selling fare media using the TAP compact sales device. TAP staff is working with a small number of vendors who are still progressing with the transition.



Metro TAP Fare Products Rollout Schedule

Metro has successfully implemented regular Metro Monthly and Weekly passes on TAP cards, with the number of sales outlets providing TAP Monthly and Weekly passes increasing every month. Rollout of other Metro TAP products including the County Buydown Monthly pass, as well as reduced fare passes for students, college/vocational students, seniors, and the disabled continues. The schedule shown below identifies the products as follows:

- The Buydown program was converted to TAP in January 2009.
- The Los Angeles Community College District I-Pass program rolled out to all nine LACCD campuses with sales for the Spring 2009 semester beginning in December. TAP conversion at Foothill Transit, Montebello Bus Lines, and Norwalk Transit in 2009 is a critical component of the Rio Hondo I-Pass program conversion to I-TAP (Fall 2009).
- Day Pass on TAP started on March 15, 2009. More than 300,000 TAP cards have been made available on bus for the first four weeks following Day Pass conversion to TAP.
- Senior passes and Disabled LACTOA passes are now in circulation with TAP. Application processing continues. There are currently 22,000 Senior and 35,000 LACTOA passes on TAP.
- Campaign for K-12 student are underway.



Metro Rail Gating Schedule

The Gating project is scheduled for pilot operation at the Soto and Mariachi Plaza Stations of the new Eastside Extension in July 2009.

ID	Task Name	Start	Finish	2009												2010											
				Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
1	Metro Gating	Sat 3/1/08	Thu 12/31/09	[Gating Period]																							
2	Cubic Limited Notice To Proceed	Sat 3/1/08	Mon 5/5/08	[Task Bar]																							
3	Prop 1B Pending	Wed 3/5/08	Thu 7/31/08	[Task Bar]																							
4	Technical Integration	Fri 5/2/08	Tue 9/29/09	[Task Bar]																							
5	Cubic Technical Spec Review	Fri 5/2/08	Sun 8/31/08	[Task Bar]																							
6	Cubic Design/Build/Test	Mon 9/1/08	Fri 6/26/09	[Task Bar]																							
7	Pilot Test of Fare Gates	Wed 7/1/09	Tue 9/29/09	[Task Bar]																							
8	Civil Work	Thu 5/1/08	Thu 12/31/09	[Task Bar]																							
9	CCTV	Thu 5/1/08	Wed 9/30/09	[Task Bar]																							
10	Metro CCTV Concept Phase	Thu 5/1/08	Sun 8/31/08	[Task Bar]																							
11	CCTV & Help Phone Spec Development & Procurement	Mon 9/1/08	Fri 2/27/09	[Task Bar]																							
12	CCTV Infrastructure Installation	Mon 3/2/09	Fri 5/8/09	[Task Bar]																							
13	CCTV & Help Phone Installations	Wed 5/13/09	Wed 9/30/09	[Task Bar]																							
14	Equipment & Fencing Installation	Mon 6/15/09	Thu 12/31/09	[Task Bar]																							
15	Demo Gold Line (Mariachi & Soto Stations)	Mon 6/15/09	Tue 8/30/09	[Task Bar]																							
16	Red Line	Wed 7/1/09	Mon 8/31/09	[Task Bar]																							
17	Green Line	Mon 8/3/09	Sat 10/31/09	[Task Bar]																							
18	Blue Line	Thu 10/1/09	Mon 11/30/09	[Task Bar]																							
19	Gold Line	Mon 11/2/09	Thu 12/31/09	[Task Bar]																							
20	Maintenance	Tue 5/6/08	Wed 9/30/09	[Task Bar]																							
21	Base Contract Mods for Eastside Extension & Expo	Tue 5/6/08	Fri 7/31/09	[Task Bar]																							
22	Launch New Service Agreement	Sat 8/1/09	Wed 9/30/09	[Task Bar]																							
23	Lease	Mon 5/5/08	Mon 8/31/09	[Task Bar]																							
24	Lease Agreement Development	Mon 5/5/08	Wed 12/31/09	[Task Bar]																							
25	Complete Lease Terms & Conditions	Mon 1/5/09	Mon 8/31/09	[Task Bar]																							

