



next generation ORCA Overview

Citizens Oversight Panel

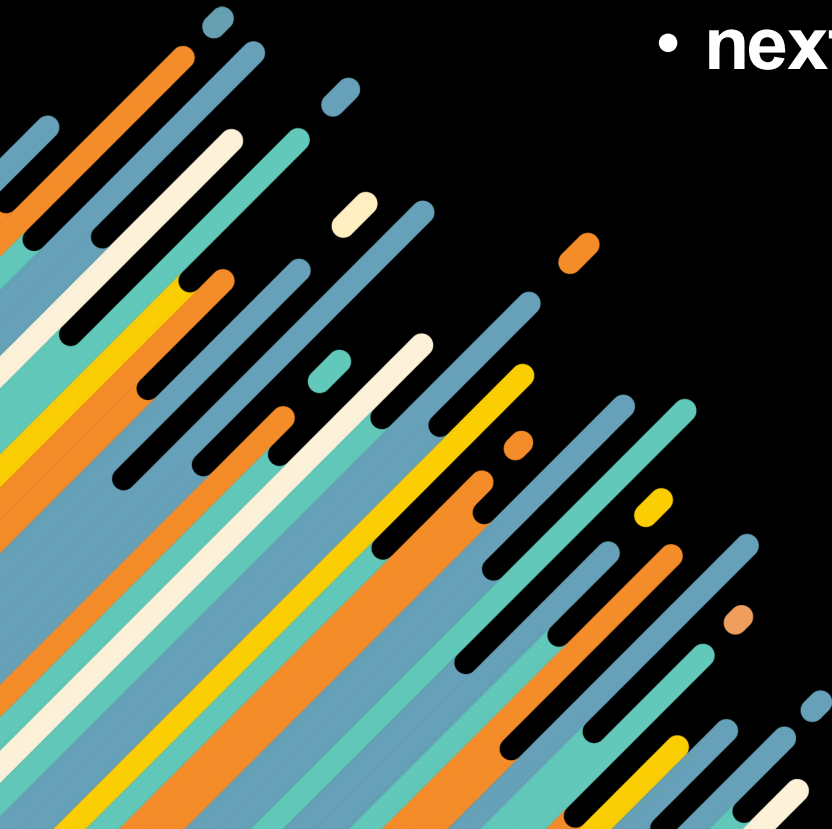
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December 2, 2020

Agenda



- **Orientation**
 - **next generation ORCA Project**
 - **Operations Planning**



Orientation



next gen ORCA Program Goals



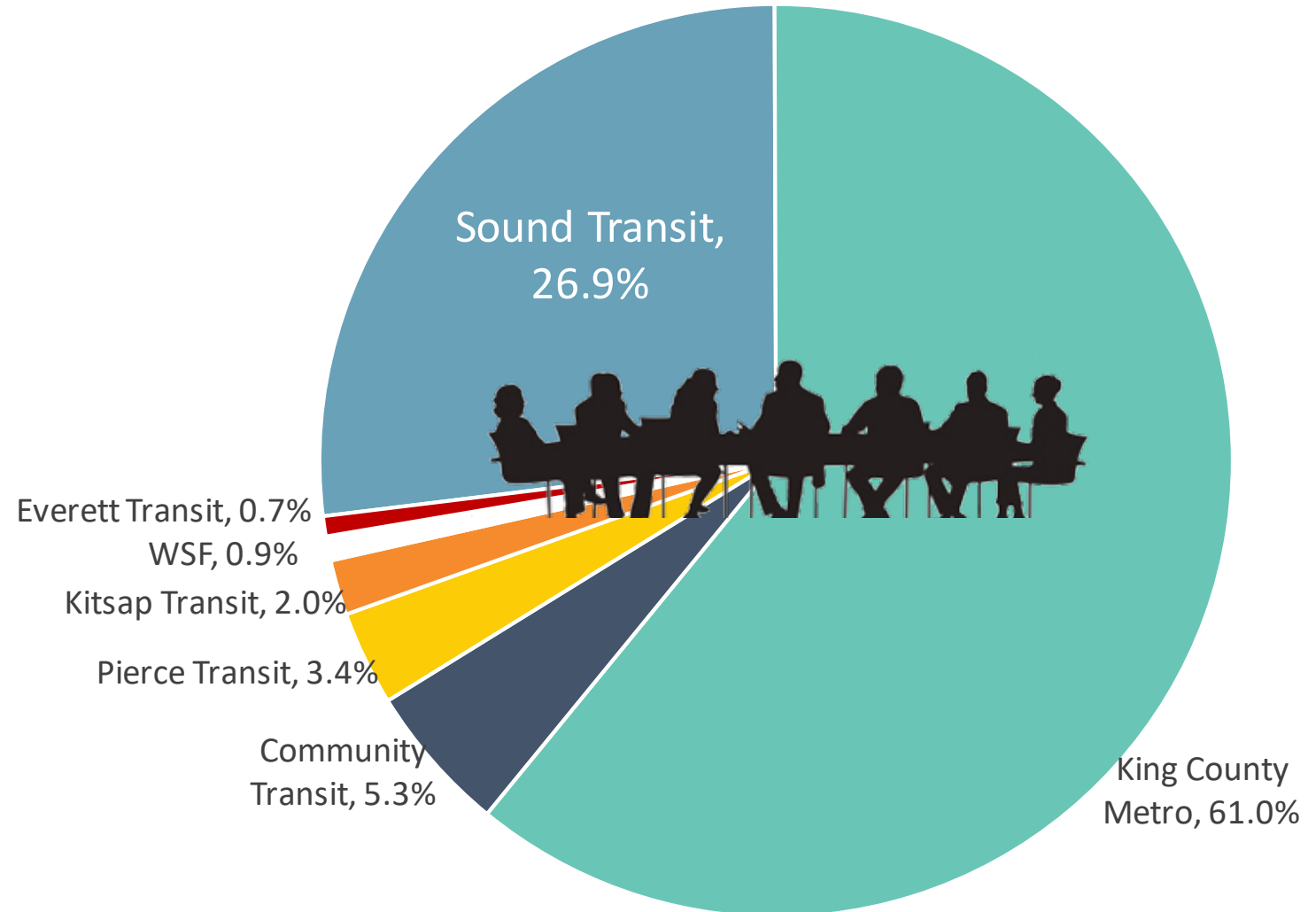
1. Improve customer experience
2. Increase ORCA usage
3. Lower cost of ownership
4. Ensure operational efficiency
5. Increase customer and data security
6. Ensure flexibility of system architecture
7. Accept multiple fare media types

A flexible and secure system offering customers convenient transportation payment options

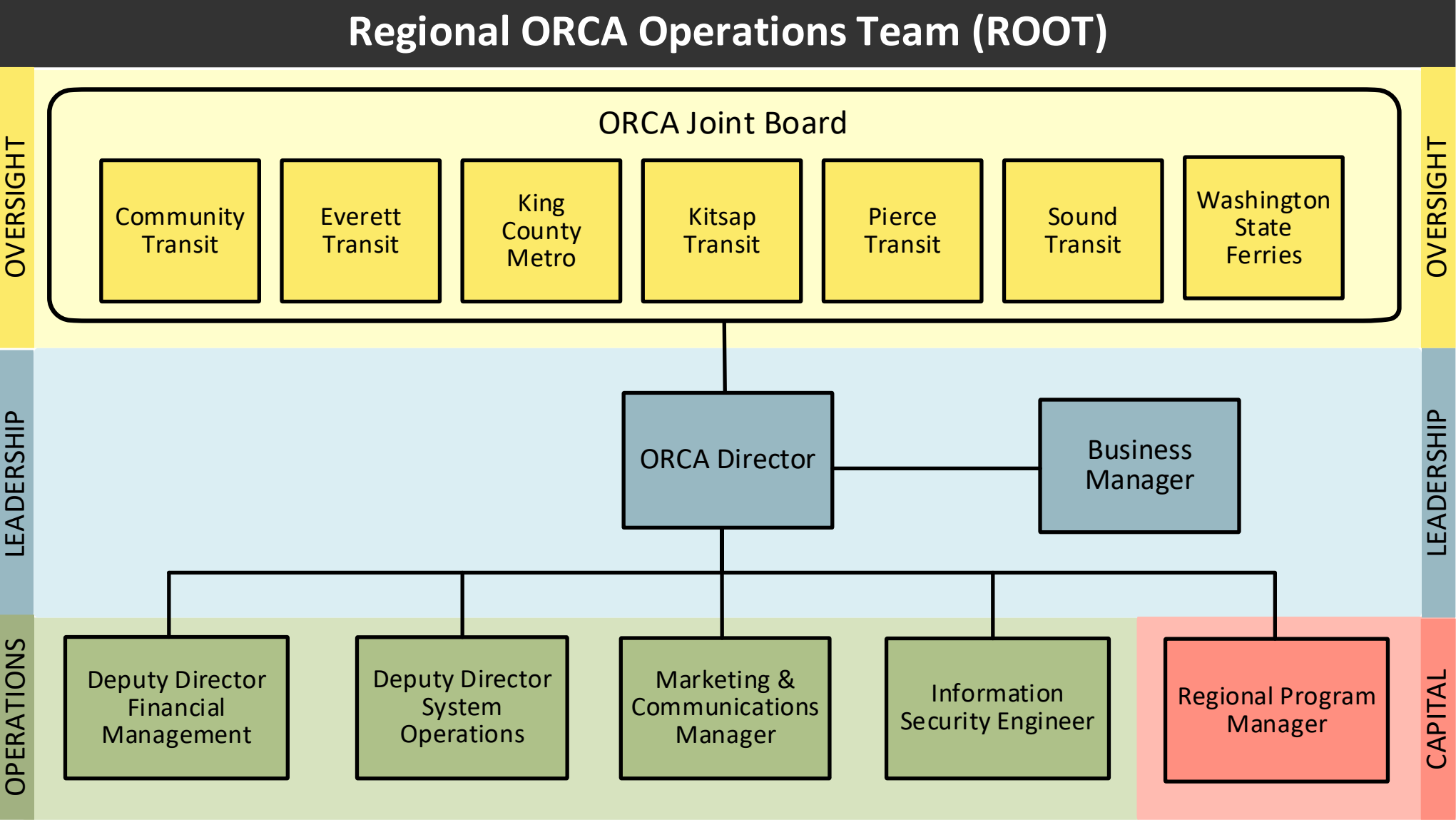
ORCA Governance




- Sound Transit is one of 7 ORCA Agencies
- Governed by consensus ORCA Joint Board
 - Mary Cummings represents ST
- ST trips currently make up ~27% of ORCA transactions
 - Resulting share of staff and other operating costs



Org Chart



A series of parallel diagonal lines in various colors (teal, orange, yellow, white, and black) are positioned on the left side of the slide, extending from the bottom left towards the center.

next generation ORCA Project

next gen ORCA Customer Benefits



WE SURVEYED THOUSANDS OF CUSTOMERS ABOUT ORCA

We're keeping all the great things customers like about ORCA. We're also working to address our customers' wish list.

Customers' biggest ORCA dislikes:

In response, next gen ORCA will offer:

1

Card loading delay

Waiting 24-48 hours for value to be loaded



Instant loading

To your ORCA account

2

Limited sales locations



More retail locations

(At least 2x!) to get ORCA and load value

3

Website challenges



New and improved website

With an easier interface

4

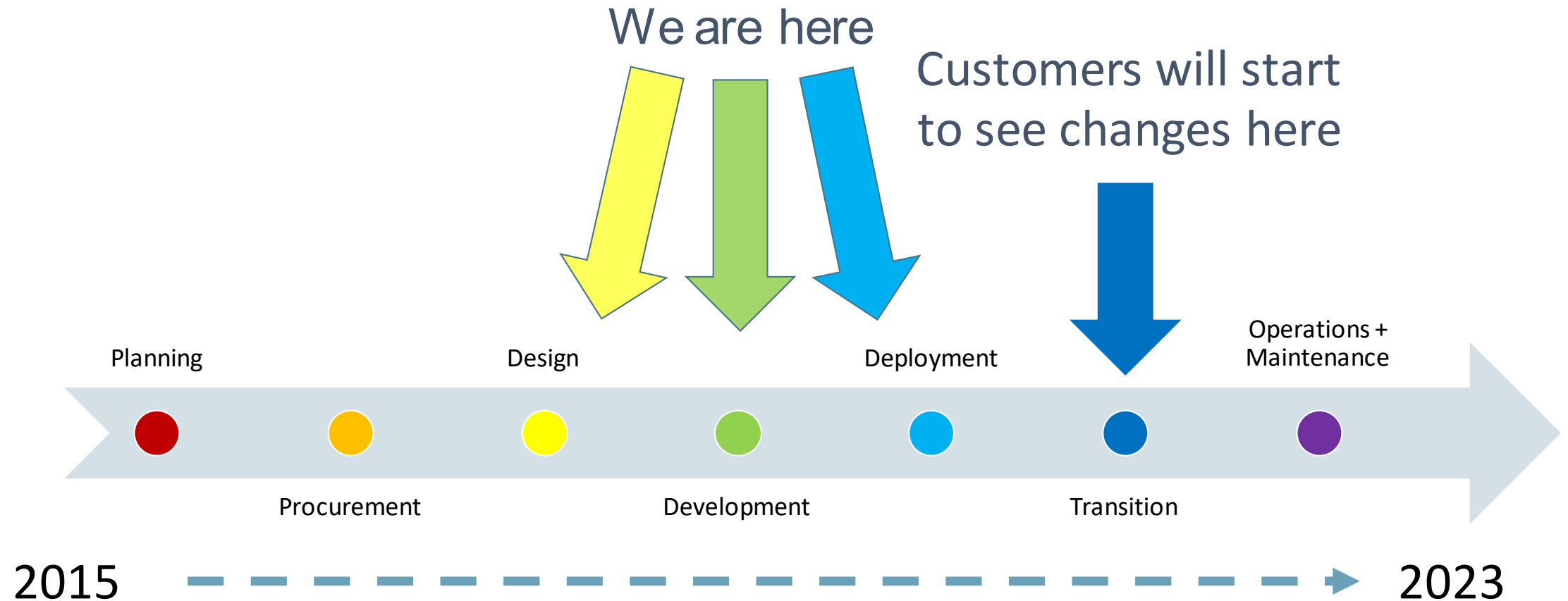
No mobile solution



A new mobile app

Add and pay fare from your device – card optional!

next gen ORCA Program Timeline



Recent Work Completed



- Preliminary Design Completed
- Final Design 60% Completion
- Refined Systems Integrator Contract Based on Design Reviews
- Started Development Work
- Retail Network Design Progress
- Fare Media Contract Executed
- Completed Production Acceptance Testing Phases (3 of 3)
- Started System Integration Testing Phases (1 of 3)
- Approved and Started Installation (Transition Adapter Kit)
- Data Warehouse Soft Launch
- Launched Marketing and Communications Strategy

Schedule Milestones*



- System Integration Testing (FUT) Started – Q3 2020
- Transition/Installation Begins – Q4 2021
 - East Link Installation Complete – Q1 2022**
 - Lynnwood Installation Complete – Q2 2022**
- Transition/Installation Completes – Q3 2022
- Final System Acceptance – Q3 2023



Footnotes:

* All dates identified prior to COVID-19 outbreak; impacts continue to be determined

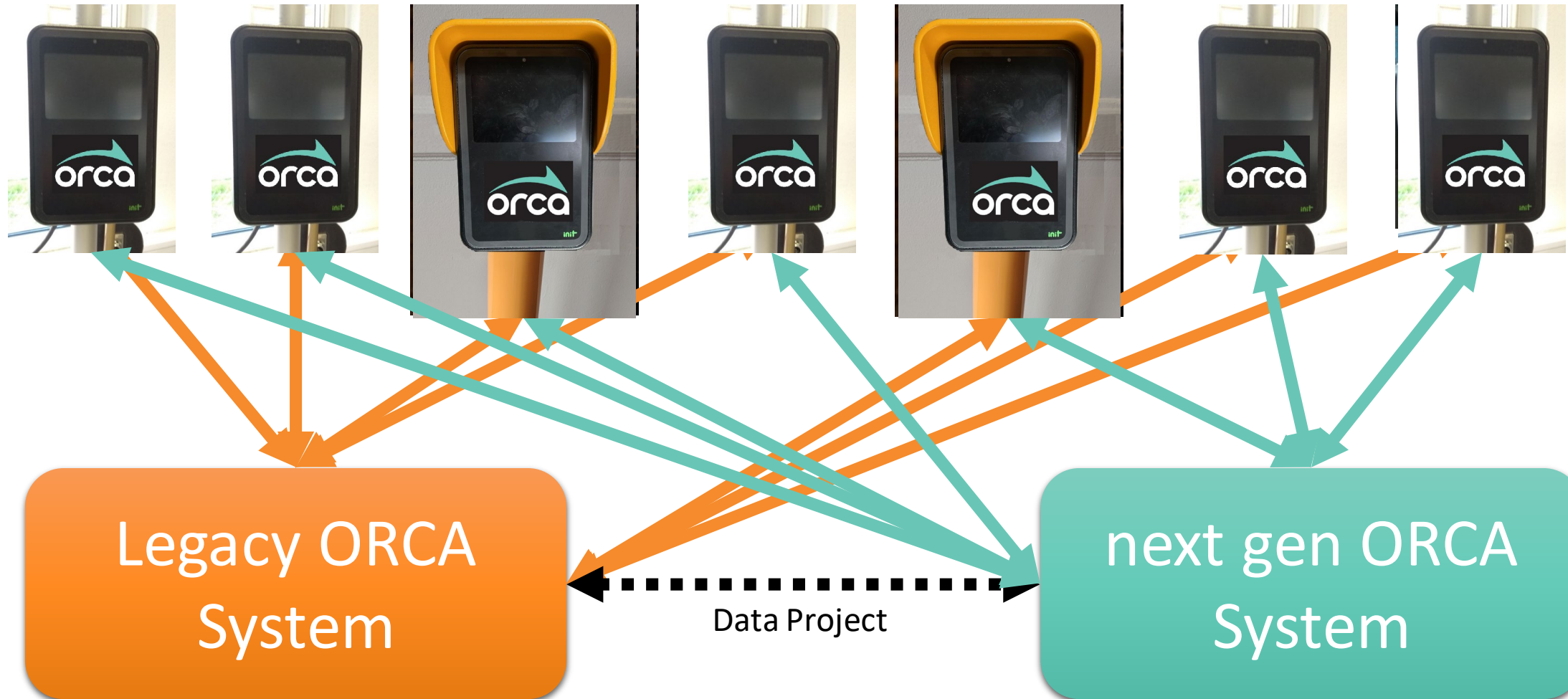
** Dates based on Liquidated Damage deadlines negotiated in 2018

Next Steps



- Final Design Completion
- Retail Network Design Completion
- Finish Development
- System Integration Testing Phases (System, Field/Pilot Test)
- Complete Transition Adapter Kit Installation
- Complete Wayside Field Device Pre-Installation
- Live Production Data Warehouse
- Marketing and Communications Outreach Begins
- Complete Agency Staff Training

Transition Strategy, Simplified



Customer-Facing Timeline



Today	Phase 1: Upgraded website and new app	Phase 2: More card options	Phase 3: Retire legacy card
Present – Winter 2021/22	Winter 2021/22 – Summer 2022	Summer 2022 – TBD	TBD
Customers use their legacy card and manage accounts at the legacy orcacard.com/.biz sites.	Customers connect their legacy card to the new myORCA app or the new myORCA.com site. The app is for riders and the website is for both riders and businesses.	Legacy cards still work, but are no longer sold or replaced. New card is available at more locations. Virtual cards are available online.	Eventually after everyone has had a chance to replace their legacy cards, they are retired and only new cards and virtual cards are available.
<div>CARD</div>			
<div>INTERFACE</div>			
			<div> <div>Legacy</div> <div>next gen</div> </div>

next gen ORCA Program Scope



Phased program:

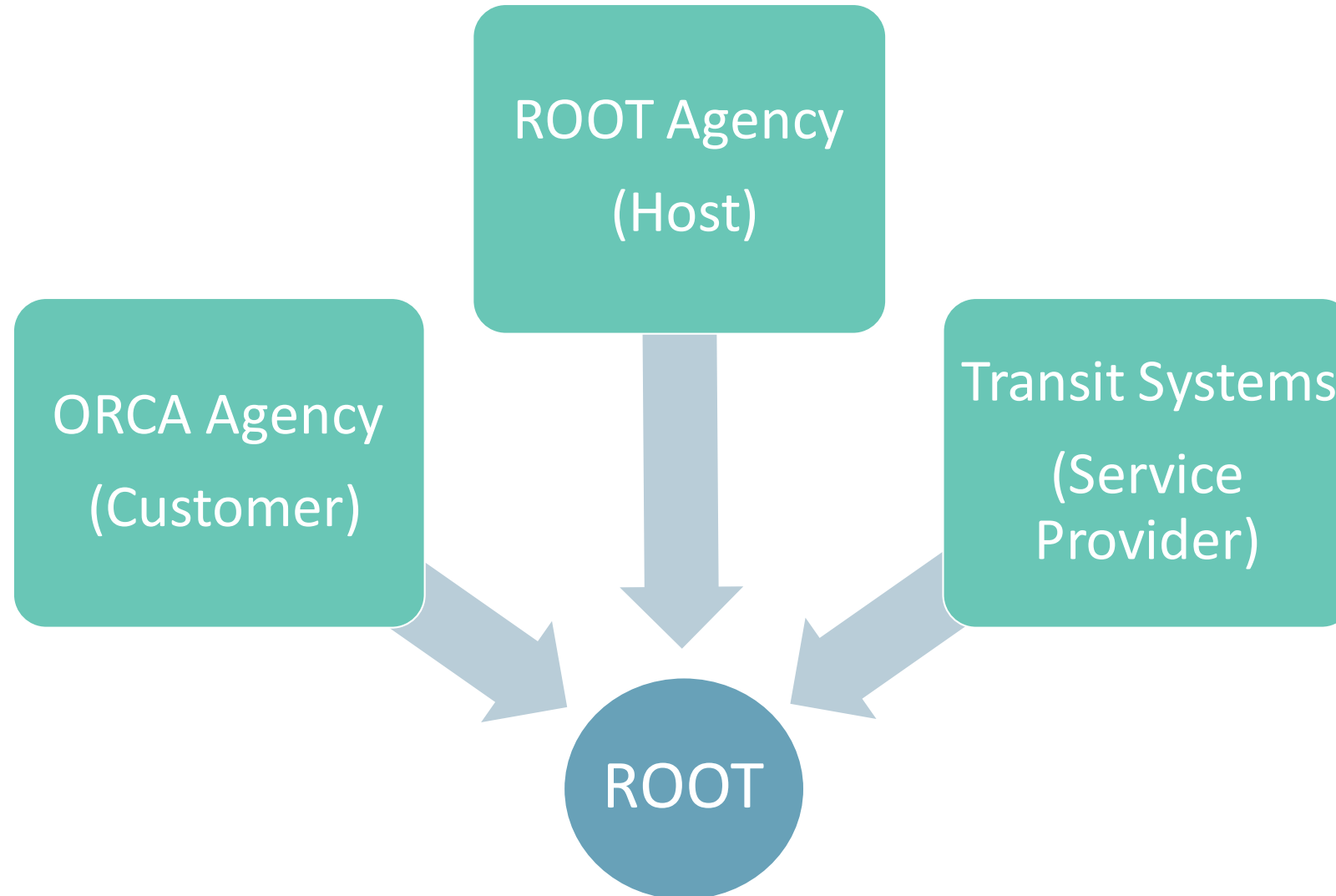
- Phase 1
 - Replacement system – what does ORCA do today?
 - Features addressing largest customer groups
- Phase 2 and Beyond
 - Integration with additional transportation modes
 - Additional features and functionality in demand
 - Further enhancement of the rider experience



Operations Planning



ST's Relationships to ROOT



ROOT Structure



Additional Services and Support



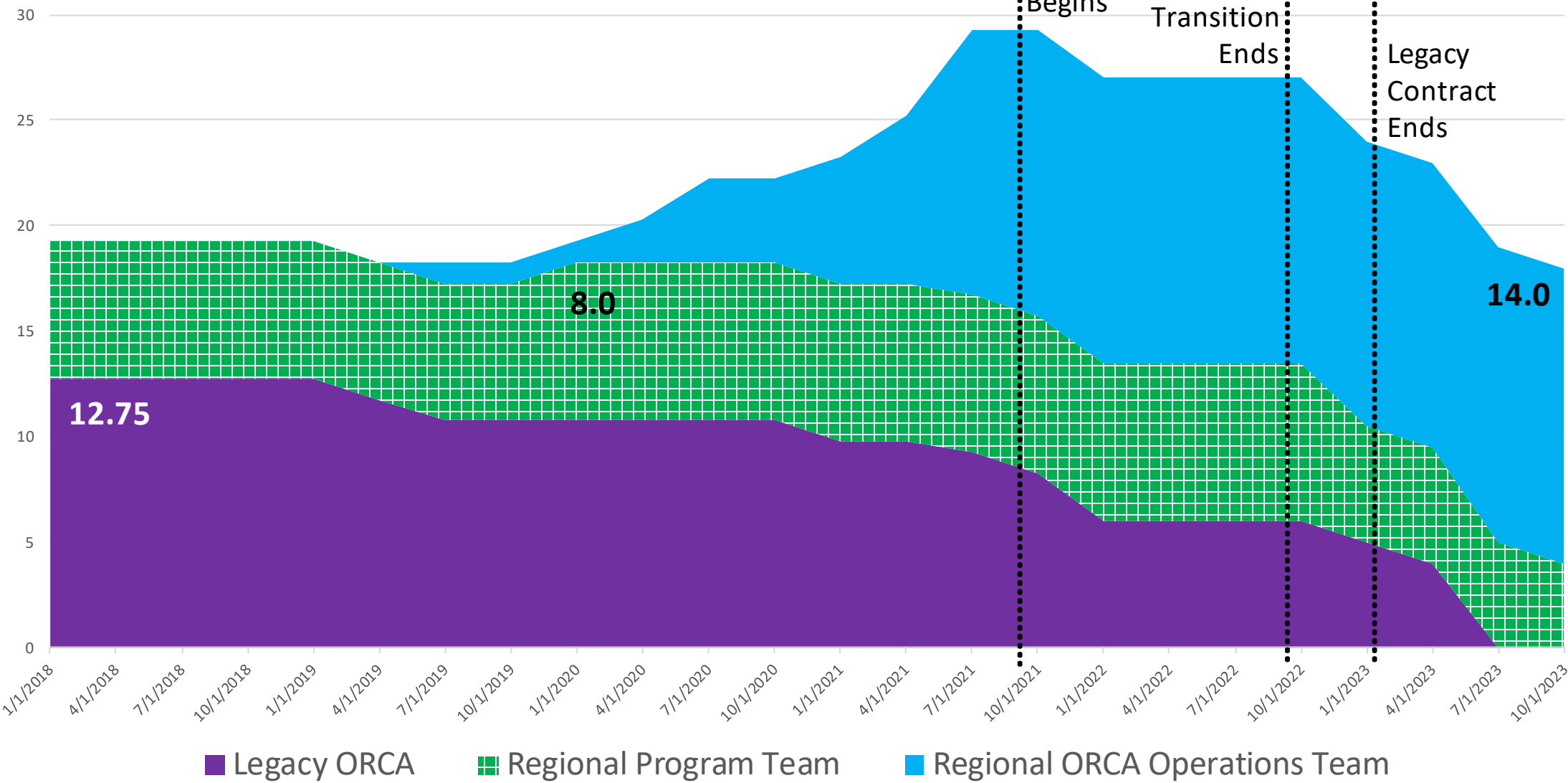
■ Host Agency Overhead Services

- *Facilities*
- *Information Technology*
- *Human Resources*
- *Procurement and Contracts*
- *Legal*
- *Marketing and Communications*
- *Others as needed*

■ Contractor Support

- *Graphic Design*
- *Marketing Support*
- *Operations Consulting*
- *Data Consulting*
- *Phone Support*

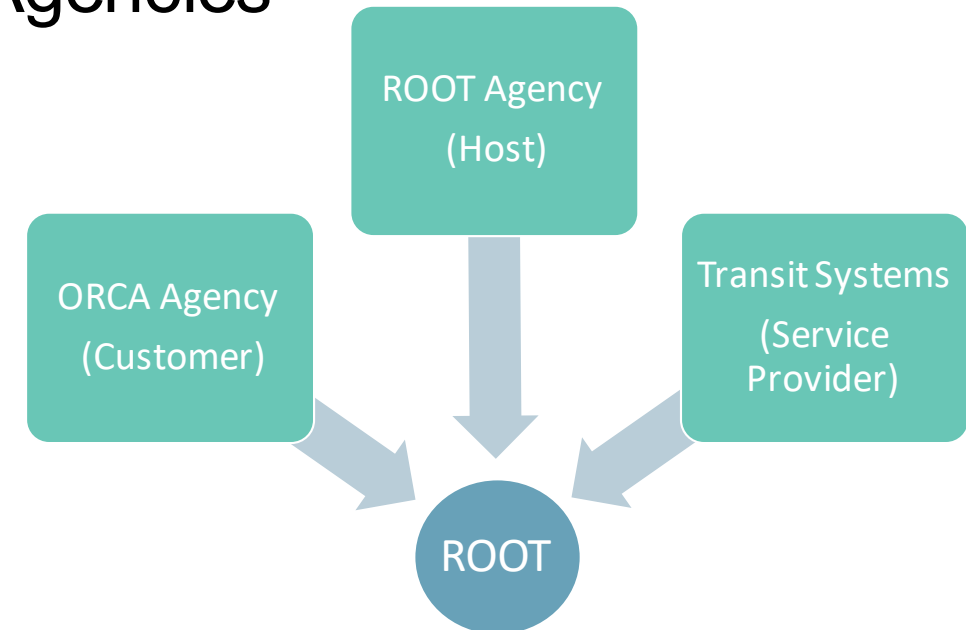
Staffing Over Time



Service Level Agreements



- ROOT → ORCA Agencies
- Host Agency (ST) → ROOT
- VM Maintenance (ST) → ORCA Agencies
- Mail Center / Inventory (KCM) → ORCA Agencies
- Systems Integrator (INIT) → ROOT
- Retail Network (Ready Credit) → ROOT



Thank you.



Friendly. Practical. Trustworthy.