Sound Transit Community Oversight Panel Virtual Meeting Summary

August 10, 2022

COP Members Present: Scott Lampe, James Peyton, Helen Powell, Larry Sauvé, Joe Scorcio, Paul Thompson, Fred Auch

COP Members Absent: none

Others Present: Kathy Albert**,** Katie Flores, Adam Montee, Chris Hoffman

New ORCA System Updates

- Brittany Esdaile, Director, Regional Fare Systems
- Scott Corbridge, ORCA Regional Program Manager

Sound Transit staff provided program updates on the new ORCA system. The presentation began with a review of the ORCA environment, which includes its governance. There are seven agencies involved and there is a Board that governs by consensus. Sound Transit has about 27% of the ridership within the ORCA system. Staff reviewed the Regional ORCA Operations Team (ROOT) organizational chart which includes the ORCA Joint Board and operations and capital staff from Sound Transit. The ROOT serves the entire region, including all 7 of the ORCA agencies. Sound Transit is the customer, along with the other agencies, and is also the host agency for the ROOT. The ROOT uses Sound Transit resources to help support its work. Transit Systems services all vending machines for all agencies. Staff then provided an orientation on the new ORCA system. The three main project drivers are scope, schedule, and budget, with the schedule being the most important because the existing ORCA system contract ends this year. Staff identified the primary differences between the existing system and the new system, which includes instant loading and doubling the number of retail stores where cards can be purchased and loaded. Other improvements include a new website and a new mobile app.

Staff then presented the program timeline, beginning in 2015 with planning and up through operations and maintenance in 2023. Staff reviewed where they are right now with the new ORCA system. They have started swapping out new equipment in the field and integrating the legacy system and the new system. Once all the old legacy systems are removed, they will be able to decommission the old system. The transition was scheduled to take 12 months, with 9,000 devices needing to be replaced. They sped up the transition by using a transition adapter and shortened the transition period from twelve down to three months. From the customer perspective, they have transitioned to a new website and app while the current card is in use. This September they will replace all equipment and launch the new card and retail network. The old card will continue to work until later phases when the mobile app will have new account management features. There is no planned date for the old card to be completely phased out. They may be phased out at some point, but no specific date has been identified. Staff reviewed next steps which include device installation and retail network launch. Next steps also include improving data and reporting capabilities, operations and design, fixing bugs, and launching all features. Staff reiterated that it's a phased system, with a lot of innovations planned for future phases.

Passenger Information Management System

- David Ginsberg, Deputy Director, Program Management Office

Sound Transit staff described the Passenger Information Management System (PIMS). PIMS is a unified multimodal replacement to the current systems, which will include real-time arrival information and reporting capability. It's a complex system with multiple facets, including IT, engineering, and passenger experience. The program has 5 goals: replacing and consolidating old, incompatible information systems; building a new, enterprise solution at no net cost to taxpayers; improving accuracy, timeliness, and readability of digital signage; providing a unified passenger experience across modes; and enhancing the capability to deliver new types of information that passengers seek. PIMS will improve both passenger experience and operations. Passengers can expect close to real-time information and more accurate arrival predictions. This new passenger experience will be consistent across modes and adaptable to include new features. From an operations perspective it will be more manageable, secure, cost effective, and future proof than the systems in use currently.

Staff provided examples of the current experience and what the experience will be under PIMS. PIMS will begin to arrive on Link and Tacoma Link in the fourth quarter of 2022 and will be fully launched in early 2025. Platform signage on Link will be replaced in the first quarter of 2023. PIMS will launch on Sounder by the 2nd quarter of 2023. Many of the known challenges and risks have been addressed, however, the pandemic has caused about a four-month delay to the completion date in the original schedule. Other ongoing challenges include integration with 1960s technology on Sounder. Current risks include dependencies on vehicle upgrade projects outside of PIMS program control.

Ridership Experience Metrics Dashboard

- Rajan Cheriel, Director, Essential Data & Analytics

Sound Transit staff started by talking about the data management process, beginning from its source, whether it's from machines, staff, or partners. They then take the data and make it usable and provide a place where people can access and understand it. The last part is then acting on the data. This constitutes the Business Intelligence Program. One critical component of the program is measuring what matters – metrics that tell Sound Transit if it is moving in the right direction or if the agency needs to make adjustments. The program kicked off with a strengths, weaknesses, opportunities, and threats (SWOT) analysis. Five themes came out of the analysis: 1) Data availability 2) Data usage 3) Data literacy 4) Organizational and cultural issues 5) Marketing and branding of the Business Intelligence Program. Staff talked about the Operations Monthly Business Review (MBR) and how they developed a metrics dashboard in Power BI, which they narrowed from 200 metrics to about 20. MBR meetings fully review each metric, identify problems, identify and assign action items, and review progress. A consolidated version of the dashboard is on the public-facing Sound Transit website.

Staff then addressed three questions that were sent in advance of the meeting. In response to the first question about riders providing input to the dashboard, staff said that the dashboard is one way but there are several other ways for passengers to provide feedback. In response to the second question about passenger feedback, staff said that Sound Transit has a database that collects and tracks feedback from the public. In response to the third question about ambassadors soliciting rider input, staff responded that ambassadors are not used to gather feedback, but customers are surveyed three times a year. Sound Transit also has a sounding board that meets monthly to get feedback. Staff then reviewed the internal and external versions of dashboard and the different categories on both. Staff then reviewed ridership data, which is broken out in several ways, for example by mode and average weekday boardings. Staff noted that June 2022 boarding exceeded June 2019, which is a major milestone, even with the addition of the Northgate Extension. Weekend ridership is increasing as well, which staff speculated suggests that non-regular riders are feeling more comfortable riding light rail. Staff then presented the peer dashboard, which allows Sound Transit to compare itself against other agencies using common metrics. Staff

reviewed passenger experience metrics and noted how the quality of the data is categorized based on several factors.

Discussion

ORCA 2.0 – COP members asked several follow-up questions about some of the topics discussed during the presentation. Two of the questions were about payment methods, specifically if Sound Transit had plans to allow customers to pay directly with credit cards, and if there were plans for merging with the Washington State Department of Transportation's *Good to Go* program. Staff indicated that they did consider the credit card options but that the financial industry isn't where it needs to be for it to work for Sound Transit and its customers, primarily due to high transaction rates. Merging with the *Good to Go* is part of a future phase but the technology isn't developed enough yet for that to happen. COP members also suggested that there is an opportunity for Sound Transit and other transit agencies to share their expertise with one another to streamline the transit card system development process. Staff said that they share information with other agencies and learn lessons from one another but that because each agency has different needs it is very unlikely that one system can work for all agencies.

COP members followed up with questions and comments about the technology used in the new ORCA system. They asked about the expected lifespan of the technology and Sound Transit indicated that the hardware is expected to last 12 to 15 years. For the software, they said that because of its open-ended architecture they expect to see a much longer back-end shelf life. COP members suggested that with the ever-changing technology that Sound Transit should get started with the next phase of planning right away and expect to replace hardware on an ongoing basis. Members concluded the ORCA discussion by indicating they have had a positive experience using the new system.

Passenger Information Management System – COP members began the PIMS discussion with a question about whether it will be launched on Bus Rapid Transit (BRT). Staff indicated that this would be cost prohibitive and challenging due to a lack of bus stop infrastructure and the ever-changing locations for bus stops. When asked to clarify what multimodal integration meant staff said that there will be a single system for all modes and that the information will be presented in the same way for all modes. COP members followed up with questions and comments about implementing the new system. Staff said that Sound Transit will replace existing signs in all stations with new signs. The on-board displays will show several stops, with the next stop marked with a larger dot than other stops. Members commented that new signs will be a vast improvement but suggested the Wi-Fi symbol might be confusing to passengers. When asked to clarify the cost of the system, staff said that the new, upgraded system will result in no new net costs to taxpayers; that it will cost the same as just replacing the system with the current technology.

Rider Experience Metrics Dashboard – Sound Transit staff spent time pulling up information on several metrics in the internal system and said that one goal is to push decision-making down to the staff who can best make decisions. Staff displayed the granularity and flexibility of the system by pulling up data about assaults, and showed how the data can be sorted and presented by mode, time of year, etc. This type of data is only presented on the internal site, which prompted responses from the COP, who indicated they would like to see more information on the public website. Staff said they are moving in that direction and want to get as much information up there as possible. Staff then showed data that compares Sound Transit to several transit systems throughout the country. COP members asked why the data presented is only through 2020 and if any Canadian transit systems are included in the comparisons. Staff indicated that it takes months to ensure the data is accurate and that because the US Federal Transit Administration coordinates all the data, only US systems are included. Staff said that they expect to have the comparative data for 2021 by October or November of this year.

COP members asked staff how many employees are using the data. Staff said they would have to follow up with that information but noted that the Business Intelligence team meets regularly with directors and deputy directors to explain the statistics and how to use them. A COP member wrapped up the discussion on this topic by suggesting that case studies would be a good way to communicate the value of using the data.

The summary of the July 13, 2022, virtual COP meeting was approved.

Member Reports

Sound Transit staff reported that the Executive Committee made a total of nine recommendations for new panel members at its most recent meeting. Pending full Board approval on August 25, the new members will bring the COP up to its full 15-member complement. Scott requested the names and backgrounds of the new members. Katie shared the names of recommended new members and indicated she would share their backgrounds via email. With the new members coming on board, Larry said that this would be Fred's last meeting as a COP member. Larry thanked Fred for his contribution and nine years of service, both as chair and his tenure as a panel member. Kathy thanked Fred for his curiosity, leadership, and constant participation.

Chris reported that he received nominations for James to serve as Chair and for Paul to serve as Vice Chair. The COP decided to hold a vote by voice for both positions. All COP members voted for James to serve as Chair and for Paul to serve as Vice Chair, and they will assume their positions at the October meeting.

Katie reported that there is still a back order for equipment that will allow the COP to meet in a hybrid format and that they don't currently have a date for when the meeting room will be set up to hold hybrid meetings.

Outstanding Questions
1. Can Sound Transit staff provide budget and schedule information on upcoming system expansion presentations?

Next Hybrid Meeting: Wednesday, September 14, 2022, 5:30 – 8:15 PM

- Safety Office Update
- Vertical Conveyance Program Update
- Asset Management Program Update