



# Agency Progress Report

## Office of Policy and Planning

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Project Delivery  
Service Delivery  
System Expansion  
Stewardship of Resources  
Organizational Vibrancy

**The Office of Policy & Planning is dedicated to developing and updating a regional system expansion and aiding the agency in achieving its goals through planning, research and integration for the region.**

March 2009

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## Program Summary

The Office of Policy and Planning (OPP) is responsible for Fare Integration, System Integration, and Strategic Planning related to realization of the long-term vision of the regional high capacity transit system.

OPP also provides policy analysis and supporting policy development on a range of issues, and coordination with the Puget Sound Regional Council (PSRC).

### Regional Fare Collection and Policy Development

A work plan for final design, testing and implementation will drive project activity through Spring 2009. System will be implemented in Spring 2009.

### System Integration and Project Development

Staff developed project and financial information to support the Board's development of the updated Sound Transit Plan (ST2) and a draft implementation guide for the voter approved program. Staff also worked closely with the Puget Sound Regional Council on completion

of the State-mandated feasibility analysis of passenger rail on the Eastside BNSF corridor. Moving forward in 2009, staff will be continuing work on the ST2 Plan including development of initial projects scopes, schedules and budgets for those early projects consisting of a broad range of reasonable alternatives; the potential to result in significant impacts; or involve multiple stakeholder groups and decision-making bodies. Following Board guidance, Sound Transit will initiate procurement of environmental and design consulting services.

### Strategic Planning and Policy Development

Activities in this quarter focused on coordinating the interdepartmental Matrix Team's review of Sound Move and ST2 program implementation, progressing bicycle policy revisions to the Board, and completing the RFP for Sounder parking pricing analysis. Work also began on developing guidelines for the new ST2 System Access Program, and a consultant was selected to support ridership forecasting modeling over the next two years.



ORCA is Near

Fare Integration and other Sound Transit staff are working hard with Partner Agencies in anticipation of the ORCA rollout for the public. The ORCA Stand Alone Card Processing Unit is shown here with an ORCA Card.

### Scope Overview

The Regional Fare Coordination ("Smart Card - ORCA") Project is a joint effort between Sound Transit Community Transit, Everett Transit, Kitsap Transit, King County Metro Transit, Pierce Transit and Washington State Ferries. The project will replace all regional fare collection equipment and processes with an automatic system for collecting and distributing fare/pass sale revenue. It will also replace most non-cash fare media with Smart Cards.



Steve, the ORCA mascot, test riding Link Light Rail opening in July 2009.

### Schedule

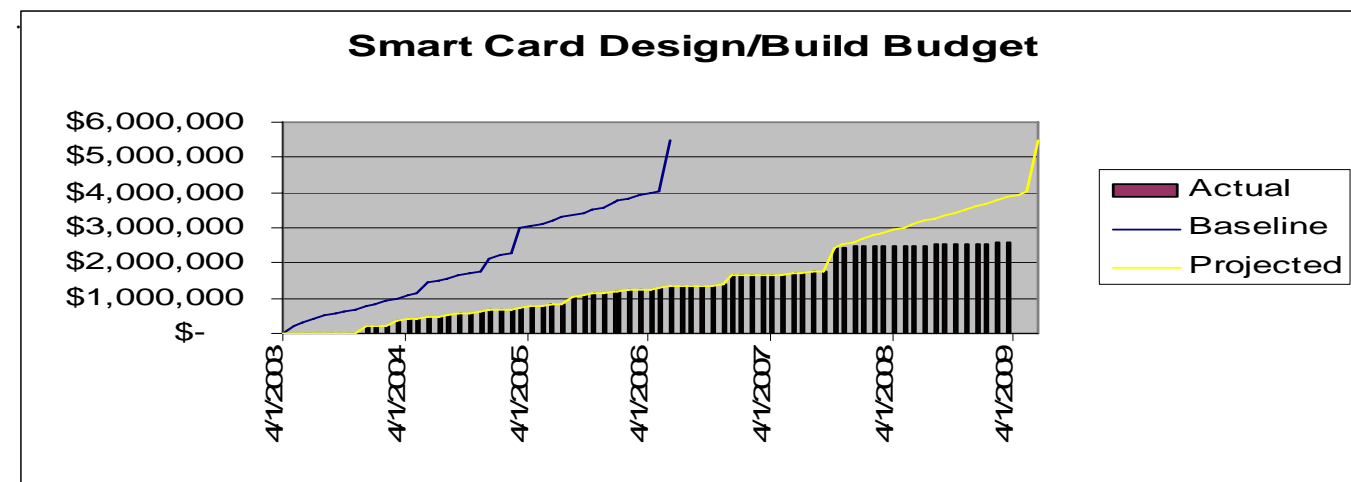
The Project schedule reflects revised System Go Live and Full System Acceptance dates per agreement with ERG.

ID	TaskName	Start	Finish	2006		2007		2008		2009
				1st Half	2nd Half	1st Half	2nd Half	1st Half	2nd Half	1st Half
7	Design Acceptance	Thu 9/29/05	Thu 9/29/05							
8	Beta Factory Acceptance Testing	Mon 9/26/05	Tue 9/5/06	[Bar]						
9	Beta System Integration Testing	Thu 6/9/05	Tue 9/26/06	[Bar]						
10	Beta Agency Staff Training	Mon 7/3/06	Sat 9/30/06		[Bar]					
11	Beta Test Equipment Installation	Tue 11/11/05	Mon 8/28/06	[Bar]						
12	Beta Test Readiness	Wed 12/6/06	Wed 12/6/06							
13	Conduct Beta Test	Thu 12/7/06	Thu 4/5/07							
14	Beta Test Acceptance	Tue 9/4/07	Tue 9/4/07							
15	Post-beta Design Development & Review	Tue 8/28/07	Fri 5/2/08							
16	Final Design Acceptance	Fri 5/2/08	Fri 5/2/08							
17	Full System Development & Testing	Wed 12/5/07	Tue 12/16/08							
18	Full System Equipment Installation	Mon 11/6/06	Mon 12/22/08							
19	Settling-in Period	Thu 1/15/09	Fri 1/30/09							
20	System Goes Live	Mon 4/20/09	Mon 4/20/09							
21	Full System Acceptance	Tue 12/1/09	Tue 12/1/09							

Smart Card project's renegotiated schedule and current Smart Card project activity.

## Cost Forecast

Sound Transit's Smart Card expenditures are currently within the baseline budget established at contract signing, primarily due to project delays which have delayed expenses. Project cost increases include higher Regional Team and Technical Consultant expenses, as well as increased equipment quantities required by Sound Transit (ST). However, these increases have been offset by projected sales tax cost savings and agency cost savings achieved by using ST internal staff resources, in lieu of budgeted consultant resources for project management, design and implementation work.



## Key Activities

### Current Period

- ERG provided additional maintenance code change releases to implement final system fixes and improvements
- Agencies have been actively testing code and system changes
- Agencies have been planning and preparing for system rollout activities

### Next Period

- System to go live to public on limited basis April 20
- System to be fully promoted and rolled out on June 1
- All activities to be completed for ORCA implementation on Link

### Closely Monitored Issues

- Integration work between ORCA and the TVM systems is proceeding well and expected to be completed by June 1 - remains a closely monitored issue until completed

## Key Contracts

The table on the right contains summary cost information and progress status for key Smart Card contracts. Costs represent the total of all, seven regional agency contracts. (Sound Transit is responsible for 10.65% of original contract amounts, plus applicable, specific change orders.)

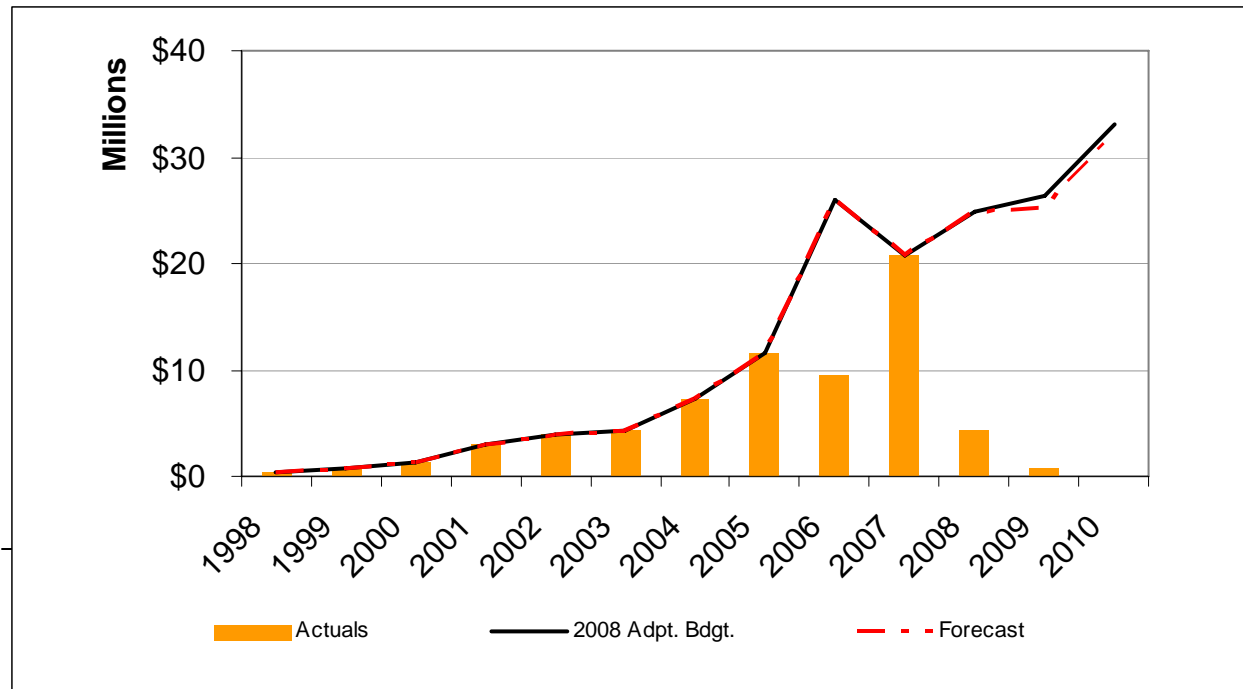
Scope	Contractor	Original Amount	Changes to Date	Current Contract Amount	Percent Complete
Design and Build RFCS System	ERG	\$31M	\$5.5M	\$37M	54%
Regional Project Management	King County Metro	\$1M	\$1.5M	\$2.5M	81%
Technical Consulting	IBI	\$525K	\$776K	\$1.3M	69%
Software Escrow	TBD	TBD	N/A	TBD	n/a
Financial Auditing	KPMG	\$20K	\$230K	\$250K	78%
<b>Total</b>		<b>\$52.5M</b>	<b>\$8M</b>	<b>\$41M</b>	<b>70.5%</b>

Regional Contracts (Sound Transit responsible for 10.65% of original contract amounts, plus applicable ST-specific shares of change orders).



## Cost Forecast

The cost forecast for the ST2 Planning program is shown in the graph below.



## Key Activities

### Current Period

- Support preparation of public information on the updated Regional Transit System Plan - (ST2 Plan)
- Begin development of the implementation program for the newly passed ST2 Plan

- Completed BNSF East Corridor Passenger Rail Feasibility Study

### Next Period

- Continue development of scopes, schedules, budgets of ST2 projects, with emphasis on potential early-implementation

## Key Contracts

This table contains summary cost information and overall progress status for the key contracts supporting the SEIS, Long-Range Plan and ST2 Plan.

Scope	No.	Consultant	Original Amount	Changes to Date	Current Contract Amount	Percent Complete
ST2 Planning and Engineering Support	RTA/PP 0130-03	PBQD	\$4.5M	\$7.42M	\$12.9 M	100%
Washington State Expert Review Panel Admin. & Support	GCA 3536, Task Order 8, Supplement #2	WSDOT (via Cedar River Group)	\$16K	\$393K	\$409K	100%
<b>Total</b>			<b>\$4.59M</b>	<b>\$7.813M</b>	<b>\$12.329M</b>	



## Office of Policy and Planning Strategic Planning & Policy Development

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### Key Activities

#### Current Period:

- Selected a ridership forecasting model maintenance consultant
- Finalized the RFP for consultant services to perform Sounder parking pricing analysis
- Drafted revised agency bicycle policies and Board motion and managed internal and external review
- Began work to scope the ST2 System Access Program
- Coordinated the Sound Move/ST2 Matrix Team review and testing of integrated program implementation approaches

#### Next Period:

- Obtain Board approval of agency bicycle policy revisions
  - Draft guidelines and work program scope for the ST2 System Access Program
  - Advertise, select a consultant and initiate the Sounder parking pricing study
  - Continue the Sound Move/ST2 Matrix Team review and testing of integrated program implementation approaches
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