Quarterly Program Management Report

1st Quarter

January-March 2010

Report Date: June 14, 2010

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1. Report Purpose:

The primary audience for this report is the Joint Board. The purpose of this report is to provide a high level quarterly overview of key system performance components that focus on customer-facing activities. Initially, the report will be useful in tracking system roll-out performance through Full System Acceptance. On an on-going basis, the report will be used to support business decisions such as the deployment of marketing resources, identify trends or issues that require further research, and provide historical reference.

2. Customer Service Equipment & Facilities:

This table shows equipment quantities and customer facilities supporting the ORCA Regional Program. Figures below are current as of March 31, 2010.

ORCA Resource	In Service
Buses with On Board Equipment • CT • ET • KCM • KT • PT • ST	275 49 1,300 90 232 243
Portable Fare Transaction Processor • CT • KCM • KT Ferry • Link • PT (not in service) • Sounder • WSF	6 50 8 20 80 8 37
Stand Alone FTP- Equipped Stations • Sounder • Link • Swift	59 76 28
3rd Party Revalue Retailer Sites	14
Ticket Vending Machines • Sounder Stations • Link Stations	32 61
Customer Service Offices	9 Agency CSO's with 22 CSTs.
WSF Turnstiles/Tollbooths	91

3. **Key Activities - First Quarter 2010**

Date	Activity
January 1	Intersystem transfers eliminated
January 1	Fare Change KCM
January 11	Joint Board Meeting
January 12	ERG began a foam insert retrofit for PFTPs, starting with WSF
January 15	Special Joint Board Meeting
January 25	Maintenance Release 9 in RTB
February 8	Joint Board Meeting
February 1-11	Maintenance Release 9 available to Agencies for testing
February 11	ERG submitted the PCI Self-Assessment and Attestation of Compliance and Quarterly Network Scan
February 19	ERG submitted a review of ORCA Privacy Statement
February 22	ERG delivered card order of 108,000 cards to agencies
March 1	Customer card fees commence
March 8	Joint Board Meeting
March 29	Maintenance Release 10 installed into RTB for ERG testing

4. Overview of Customer Activity & Contacts

This table highlights ORCA transactions, customer activities and contacts. We expect these measures to increase along with the number of cards in circulation.

Measure	January	February	March
Transaction Volume:			
Number of Fare Transactions/Boarding on All Services	3,540,997	3,937,264	4,724,418
Number of Cards in Use	132,060	149,707	159,017
Autoload Activity:			
Number of Autoload Accounts Established	1,511	1,453	1,553
Number of Autoload Transactions	3,610	3,998	4,563
Amount of Autoload Successful Transactions	$136,156	$151,871	$183,740
Call Volume:			
ORCA Regional Call Center Calls	9,838	9,131	9,460
Email Volume:			
ORCA Regional Emails	3,566	2,195	2,521
Cardholder Website Traffic:			
Unique Visitors*	63,204	30,543	48,233
Visits**	141,388	58,857	106,316
Number of "My ORCA" Accounts Established	32,000	150,443	166,683
Number of Cardholder Transactions	26,867	24,785	27,317
Amount of Cardholder Successful Transactions	$1,310,948	$1,088,354	$1,389,435

Notes:

*Unique Visitors - A unique visitor is defined as an individual who has made at least one hit on one page of the web site during the current reporting period. If this individual makes several visits during the period, it is counted as one visit.

**Visits - Number of visits made by all visitors.

5. System Operations Performance Data

a) System Operations - Regional Customer Contact

The Regional Call Center and "Contact ORCA" emails are the primary means of customer contact. The reason codes from the Call Center and "Contact ORCA" emails allow identification of trends and issues impacting cardholders.

i) Answered Calls and Email Contacts

Measure	January	February	March
Number of Calls Answered	9,838	9,131	9,460
Number of Emails Handled	3,566	2,195	2,521
Total	13,404	11,326	11,981

ii) Abandoned Calls

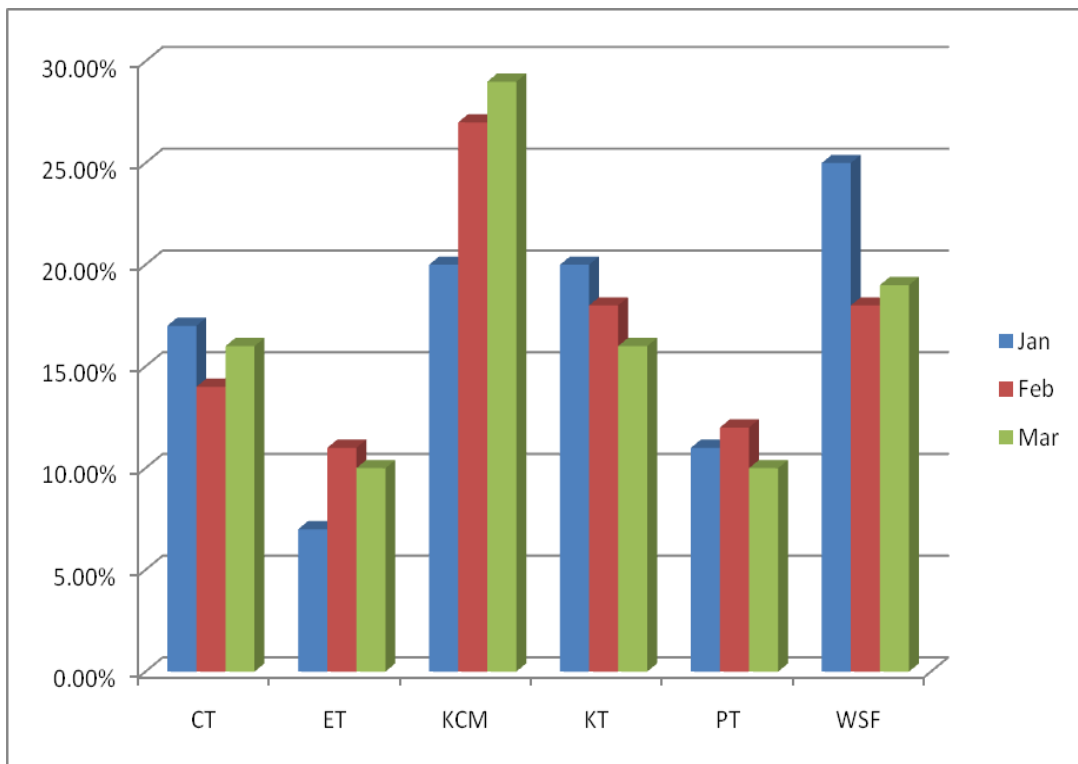| Measure	January	February	March
Number of Calls Abandoned*	4,377	1,859	2,233
Abandoned Call Rate	30.79%	16.92%	19.10%

*Note: An "abandoned" call is when a customer hangs up prior to connecting with an agent.
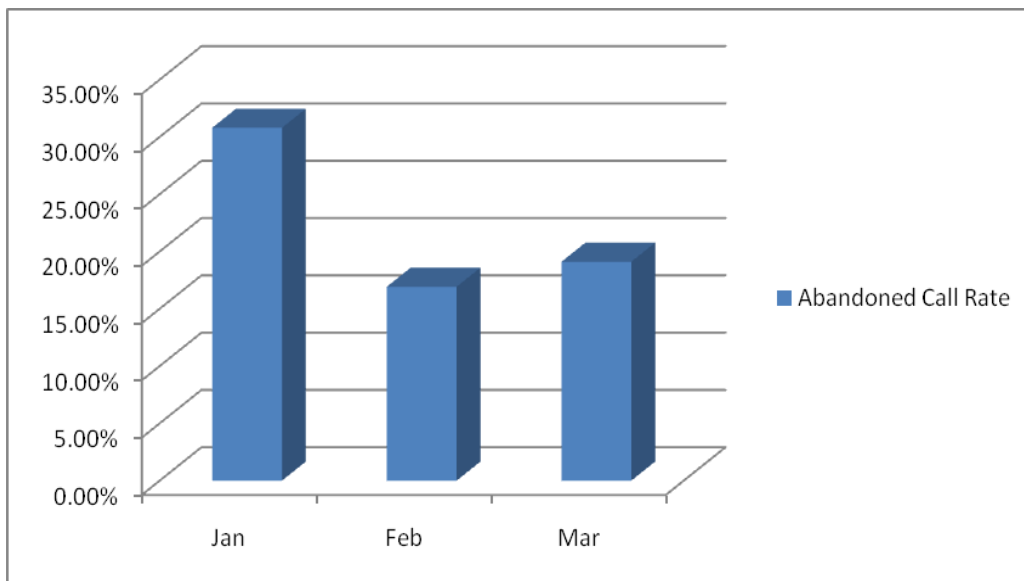
Percentage of Calls Abandoned

iii) Percentage of calls answered by Agency

Agency	January	February	March
CT	17%	14%	16%
ET	7	11	10
KCM	20	27	29
KT	20	18	16
PT	11	12	10
WSF	25	18	19
Total	100%	100%	100%

Share of Total Answered Calls by Agency

iv) ORCA Calls Logged by Reason

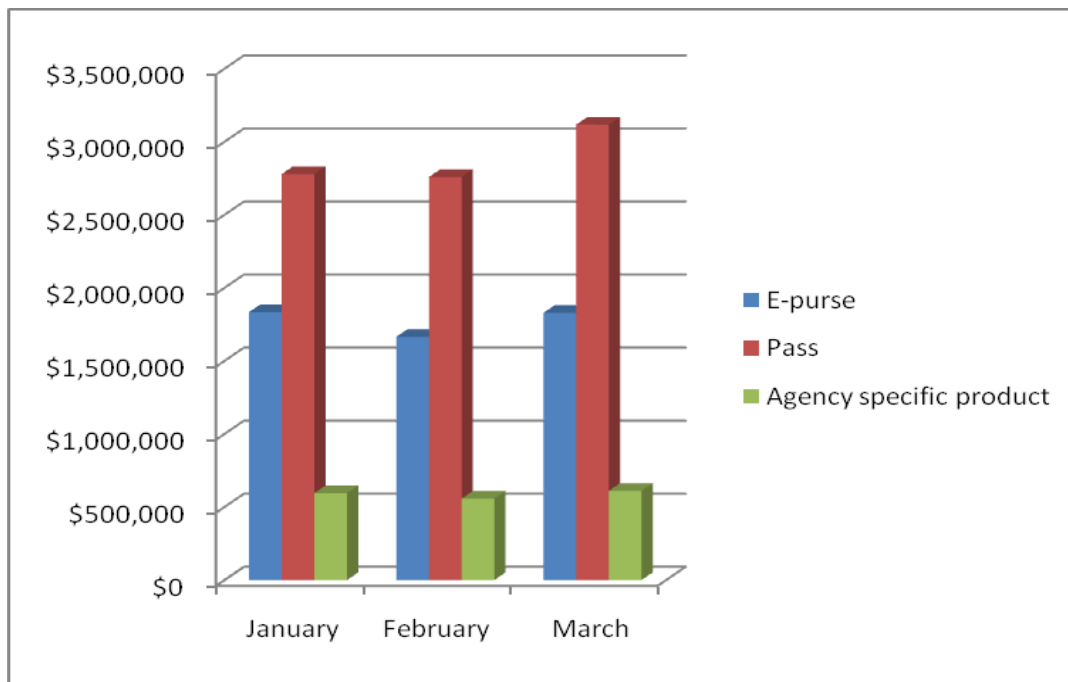| Reason Code	January	February	March	Totals
General Inquiry	2,987	2,435	2,779	8,201
Add Value	2,171	2,466	3,103	7,740
Account Maintenance	1.993	2.294	2,472	6,699
Cardholder Financial Inquiry	1,033	1,073	1,129	3,235
Refund	428	432	475	1,335
Card Registration	447	395	425	1,267
Website	267	292	305	864
Lost/Stolen	213	230	248	691
Agency Financial Inquiry	241	405	0	646
Card Order	305	170	0	475
Agency Other	0	0	320	320
Autoload Update	0	0	238	238
Total occurrences	**8,094**	**7,900**	**11,494**	**31,711**
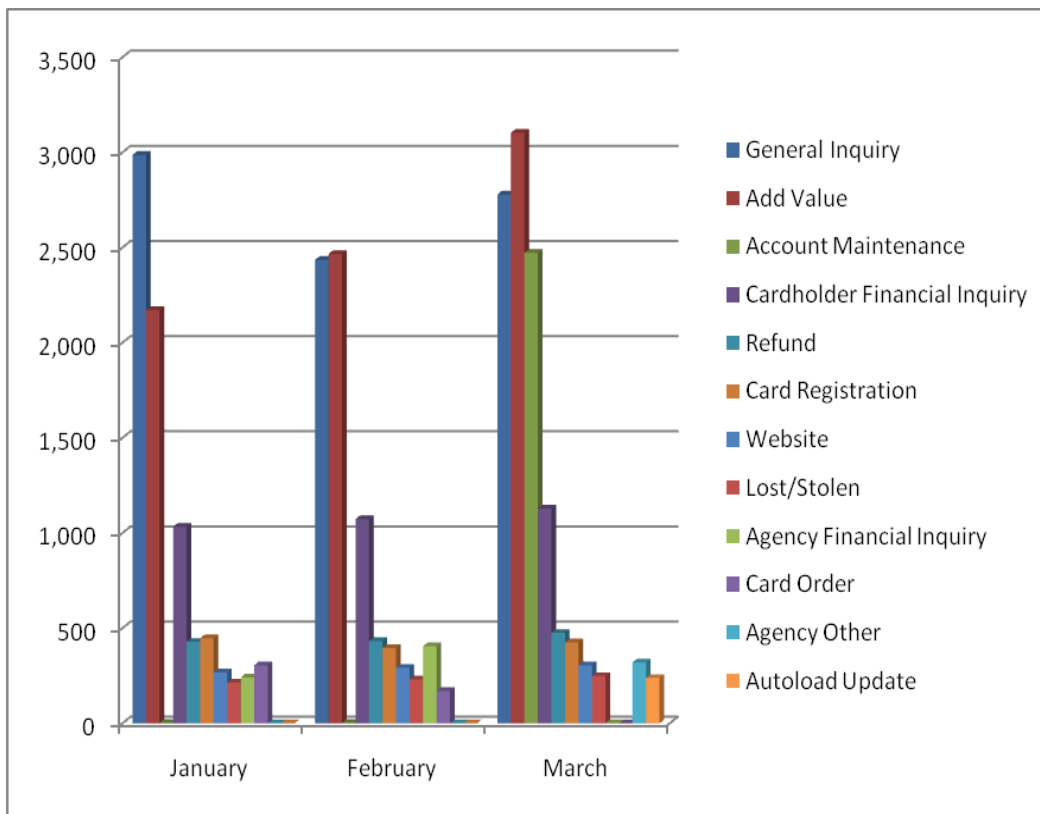
ORCA Calls By Reason Code

b) System Operations - Sales by Fare Product Type and Sales Channel/Location

This section shows total ORCA fare product sales distributed by E-purse or pass, and sales by location/channel. This information may support decisions such as the deployment of customer information, marketing resources or management of 3rd party retail outlets.

i) E-purse, Pass Sales, and Agency Specific Product

Sales	January	February	March	Total
E-purse	$1,918,381	$1,753,876	$1,938,022	$5,610,279
Pass	2,810,783	2,797,965	3,165,669	8,774,417
Agency Specific Product	614,540	579,117	633,796	1,827,453
Total	$5,343,704	$5,130,958	$5,737,486	$16,212,148

ORCA Fare Sales by Product Type

ii) Sales by Channel

| Sales Channel	January	February	March	Total	% of Total Sales
Autoload	$136,156	$151,871	$183,740	$471,767	2.91%
BA Website*	$1,816,490	$2,038,345	$2,117,003	$5,971,838	36.88%
Cardholder Website	$1,310,948	$1,088,354	$1,389,435	$3,788,737	23.40%
Call Center	$64,568	$79,169	$97,360	$241,097	1.49%
CST	$1,092,495	$958,490	$1,061,539	$3,112,524	19.22%
Retailer (14)	$262,101	$224,399	$232,692	$719,192	4.44%
Agency TRU (2)	$ 3,650	$5,225	$6,806	$15,681	0.10%
TVM	$658,473	$586,980	$652,948	$1,898,401	11.70%
Total	$5,344,882	$5,132,833	$5,741,522	$16,219,237	100%

Note: BA Website does not include any sales of BA Passport products.
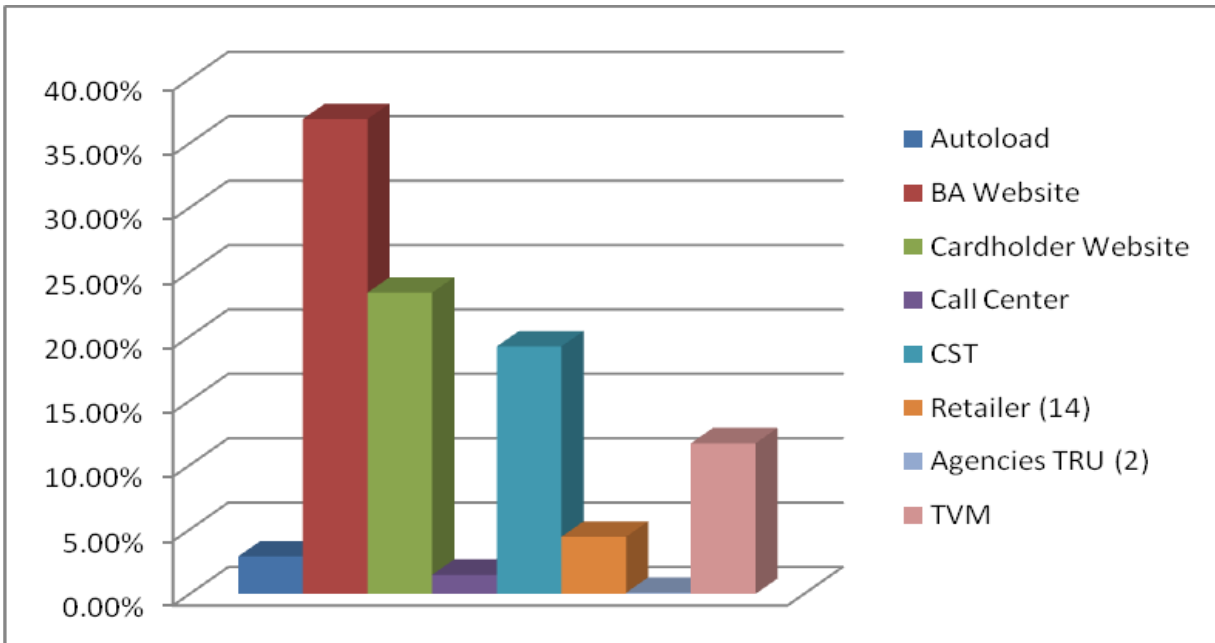
Share of Total ORCA Sales By Channel

iii) Monthly Sales at CST Locations

CST Location	January	February	March	Total	% of Total Sales
CT Ride Store	$ 190,011	$ 139,365	$ 150,914	$ 480,290	15.43%
ET – Everett	82,040	79,065	89,058	250,163	8.04%
KCM – King Street	232,260	193,855	203,157	629,272	20.22%
KCM – Westlake	240,336	260,417	293,910	794,663	25.53%
KT – Bremerton	103,919	99,616	108,029	311,564	10.01%
ORCA – Mail Center	38,675	29,511	32,896	101,082	3.25%
PT – Commerce	96,929	70,697	86,418	254,044	8.16%
PT – Lakewood	49,201	35,197	36,565	120,963	3.89%
PT - Tacoma Dome	55,272	47,540	56,174	158,986	5.11%
ST – Union Station	3,101	2,688	3,182	8,971	0.29%
WSF – CST	752	538	1,235	2,526	0.08%
Total	$1,092,495	$ 958,490	$1,061,539	$3,112,524	100%
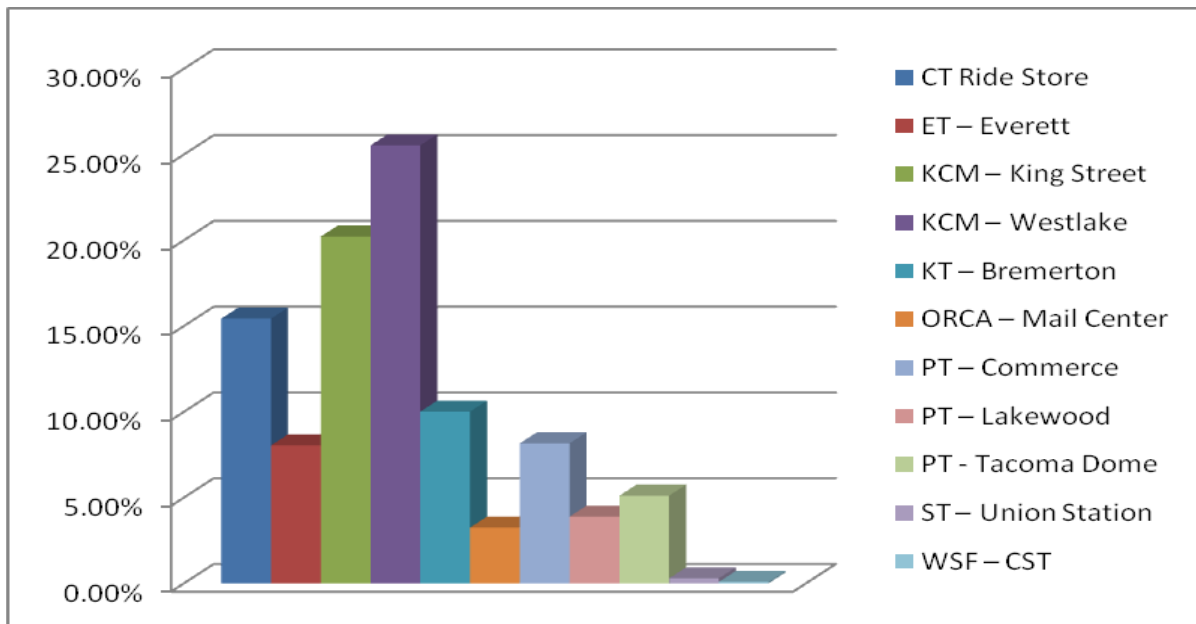
Share of Total Monthly Sales by CST Location

iv) Revenue Generated by BA Passport Product

Lead Agency	January	February	March
Community Transit	$3,708	$3,710	$3,710
Everett Transit	256	256	256
King County Metro	3,778,783	3,967,295	4,092,327
Kitsap Transit	506,105	316,007	316,394
Pierce Transit	2,695	8,378	30,478
Washington State Ferries	0	0	0
Total	$4,291,547	$4,295,646	$4,443,164

v) Revenue Generated by Pass Product

Pass	January	February	March
Kitsap Transit Full Fare Pass	$54,150	$47,800	$57,650
Kitsap Transit Reduced Fare Pass	24,000	26,275	36,600
Kitsap Transit Worker/Driver Full Fare Pass	1,575	1,500	1,200
Metro Annual Reduced Fare Pass	85,734	55,341	54,054
Metro Monthly Access Pass	14,256	14,634	13,446
Metro Monthly Adult Pass Offpeak	0	0	0
Metro Monthly Adult Pass Peak	0	0	0
Metro Monthly Reduced Fare Pass	50,958	65,232	72,468
Metro Monthly Vanpool Pass A	35,640	32,805	33,210
Metro Monthly Vanpool Pass B	44,154	38,115	37,818
PugetPass $0.50	8,388	7,866	7,596
PugetPass $0.75	78,535	86,346	89,451
PugetPass $1.00	10,512	10,800	10,656
PugetPass $1.25	5,625	7,065	7,110
PugetPass $1.50	69,066	93,852	98,118
PugetPass $1.75	114,708	107,163	108,234
PugetPass $2.00	242,153	231,408	220,608
PugetPass $2.25	628,786	839,565	886,545
PugetPass $2.50	209,603	224,190	226,800
PugetPass $2.75	337,372	497,574	561,908
PugetPass $3.00	72,036	86,616	90,504
PugetPass $3.25	9,711	18,486	19,773
PugetPass $3.50	154,602	208,404	220,500
PugetPass $3.75	45,900	58,995	61,155
PugetPass $4.00	10,944	13,104	14,256
PugetPass $4.25	42,687	53,091	53,244
PugetPass $4.50	32,076	41,148	41,796
PugetPass $4.75	21,546	27,531	25,137
WSF Central Sound Monthly Pass	266,110	261,074	0
WSF Fauntleroy-Southworth Monthly Pass	12,281	11,942	283,604
WSF Mukilteo-Clinton Monthly Pass	14,385	13,388	13,095
WSF Port Townsend-Keystone Monthly Pass	68	68	18,795
WSF Vashon Island Monthly Pass	11,229	10,944	11,856
Grand Total	$5,295,330	$6,138,944	$6,641,588

c) System Operations - Ridership Transactions/Boardings

This section shows the average weekday ORCA boardings by Agency and the share of those trips to each Agency's total boardings. This data supports the annual calculation of the regional share of program operating expenses for individual agencies.

i) Average Weekday ORCA Boardings by Month

Agency	January	February	March
Community Transit	11,542	13,908	14,569
Everett Transit	3,012	3,615	3,494
King County Metro	86,113	103,057	109,870
Kitsap Transit	5,039	5,397	5,754
Pierce Transit	10,997	12,789	13,284
Sound Transit	27,966	33,423	34,249
Washington State Ferries	2,492	2,686	2,795
Total	147,161	174,875	184,015
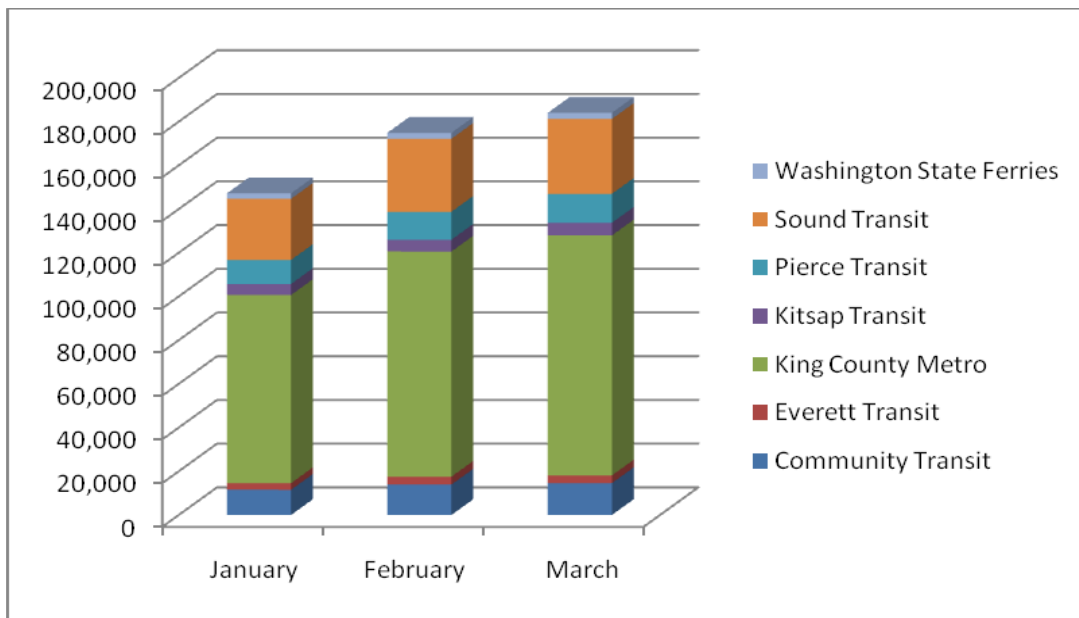
Agency Shares of Total Monthly ORCA Boardings

ii) ORCA Average Weekday Boardings as a Percentage of Average Weekday Total Boardings

Agency	Average Weekday ORCA Boardings March	Average Weekday Total Boardings (ORCA & Non-ORCA) March	% of Average Weekday ORCA Boardings March
Community Transit	14,569	33,051	44.1%
Everett Transit	3,494	7,796	44.8%
KCM	109,870	362,088	30.3%
Kitsap Transit	5,754	12,803	44.9%
Pierce Transit	13,284	40,884	32.5%
Sound Transit Bus	22,689	42,417	53.5%
Sound Transit Sounder	5,576	9,222	60.5%
Sound Transit Link	5,984	20,867	28.7%
WSF Ferries	2,795	9,264	30.2%
Total	**184,015**	**538,392**	**34.2%**

iii) ORCA Boardings by Product Type

Boardings*	January	February	March	Total	% of Total Boardings
E-purse	901,620	987,776	1,147,519	3,036,915	24.89%
Agency Specific Pass	456,150	507,261	619,931	1,583,342	12.98%
PugetPass	1,227,611	1,423,343	1,685,212	4,336,166	35.53%
Regional Bus & Train Passport	955,616	1,018,884	1,271,756	3,246,256	26.60%
Total	**3,540,997**	**3,937,264**	**4,724,418**	**12,202,679**	**100%**

Note: Boardings by Product can be higher than actual boardings as multiple products *may be used for one boarding.*

## d) System Operations - ORCA Cards in Circulation and in Use by Type

This section provides information on issued ORCA cards and the actual usage of ORCA cards on Agency services. This information helps Agencies track ORCA card use and assist in their evaluation of their card distribution/outreach strategies.

i) Cumulative Number of Issued Cards in Circulation

Card Type	January	February	March
Standard(Adult/Youth) Cards	375,885	400,416	419,843
RRFP Cards	44,330	48,652	50,222
Total	420,215	449,068	470,065

ii) Cards in Use by Month

Cards in Use	January	February	March
Total	132,060	149,707	159,017

Issued Cards in Circulation and In Use

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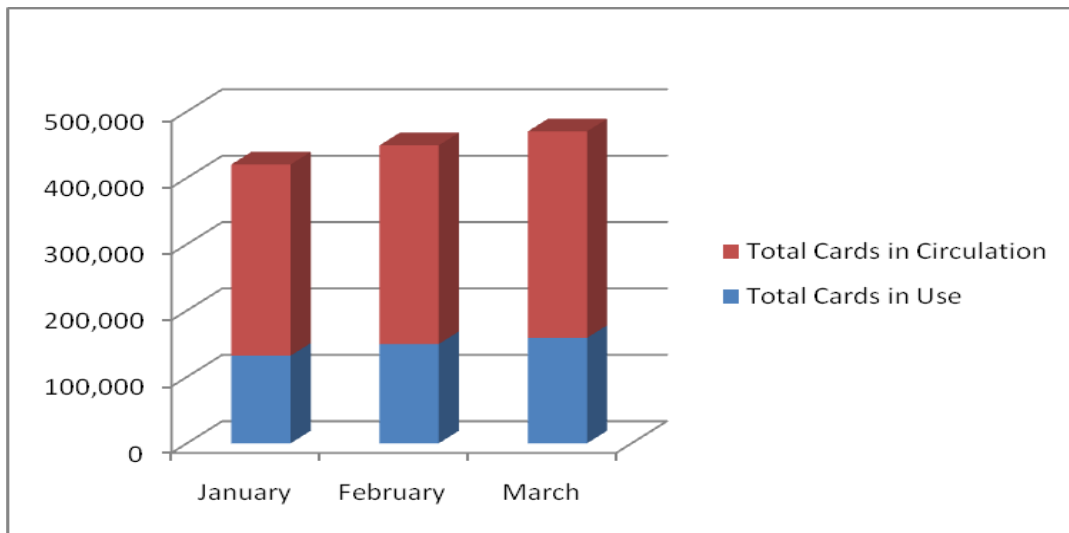
7. Data Sources:

- ORCA Regional Call Center Reports
- ORCA Boardings by Participant Report
- Agencies Ridership data
- ORCA Sales by Participant Report
- ORCA Daily Sales Ad Hoc Report
- ORCA Activity Report
- ORCA Card Inventory Report
- AV_TRANSACTION_SUMMARY Ad Hoc Report
- AV_CARD_HOLDER_LOOKUP Ad Hoc Report

8. Acronyms:

The below table describes the acronyms used in this report

Acronym	Definition
BA	Business Account
CST	Customer Service Terminal
CT	Community Transit
DDU	Driver Display Unit
ET	Everett Transit
FSA	Full System Acceptance
FTP	Fare Transaction Processor
KCM	King County Metro
KPI	Key Performance Indicator
KT	Kitsap Transit
OBE	On-Board Equipment
OBFTP	On-Board Fare Transaction Processor
ORCA	One Regional Card for All
PFTP	Portable Fare Transaction Processor
PT	Pierce Transit
RRFP	Regional Reduced Fare Permit
RTB	Regional Test Bed
SAFTP	Stand-Alone Fare Transaction Processor
ST	Sound Transit
TVM	Ticket Vending Machine
WSF	Washington State Ferries