



**Quarterly Program Management Report**

**2nd Quarter**

**April-June 2010**

**Report Date: August 9, 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such as the deployment of marketing resources, identify trends or issues that require further research, and provide historical reference.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 June 30, 2010.

ORCA Resource	In Service
Buses with On Board Equipment <ul style="list-style-type: none"> <li>• CT</li> <li>• ET</li> <li>• KCM</li> <li>• KT</li> <li>• PT</li> <li>• ST</li> </ul>	275 49 1,277 90 232 243
Portable Fare Transaction Processor <ul style="list-style-type: none"> <li>• CT</li> <li>• KCM</li> <li>• KT Ferry</li> <li>• Link</li> <li>• PT (not in service)</li> <li>• Sounder</li> <li>• WSF</li> </ul>	6 60 8 20 80 8 37
Stand Alone FTP- Equipped Stations <ul style="list-style-type: none"> <li>• Sounder</li> <li>• Link</li> <li>• Swift</li> </ul>	75 76 28
3 <sup>rd</sup> Party Revalue Retailer Sites	21
Ticket Vending Machines <ul style="list-style-type: none"> <li>• Sounder Stations</li> <li>• Link Stations</li> </ul>	32 61
Customer Service Offices	9 Agency CSO's with 22 CSTs.
WSF Turnstiles/Tollbooths	91

### 3. Key Activities - Second Quarter 2010

Date	Activity
April 1	Awarded a contract to Anthro-Tech to perform ORCA customer website usability studies
April 6	Joint Board approved the commencement of full Beneficial Use
April 8	Awarded a contract to Coalfire to advise the agencies on PCI compliance
April 12	Joint Board Meeting
April 20	Maintenance Release 10 was promoted to production
May 2	Began Full System Acceptance Testing
May 10	Joint Board Meeting
June 1	Fare Change ET, CT, ST
June 14	Joint Board Meeting
June 28	Maintenance Release 11 was deployed to the RTB
Through June 30	Seven (7) new retail revalue sites (Safeway) were opened

### 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	April	May	June
<b>Transaction Volume:</b>			
Number of Fare Transactions/Boarding on All Services	4,641,228	4,623,016	4,983,916
Number of Cards in Use	170,972	203,891	266,531
<b>Autoload Activity:</b>			
Number of Autoload Accounts Established*	1,449	1,340	1,362
Number of Autoload Transactions	5,160	5,450	5,275
Amount of Autoload Successful Transactions	\$200,589	\$204,105	\$214,541
<b>Call Volume:</b>			
ORCA Regional Call Center Calls	8,192	7,027	8,380
<b>Email Volume:</b>			
ORCA Regional Emails	1,442	1,685	1,305
<b>Cardholder Website Traffic:</b>			
Unique Visitors**	43,686	44,427	48,585
Visits***	93,562	90,306	101,869
Number of "My ORCA" Accounts Established+	178,319	187,460	197,960
Number of Cardholder Transactions	25,381	25,740	27,248
Amount of Cardholder Successful Transactions	\$1,152,587	\$1,185,004	\$1,272,914

**Notes:**

**\*Number of Autoload Accounts Established** - Number of current autoload accounts that are active during the month. This is not a cumulative number.

**\*\*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.

**+Number of My ORCA Accounts Established** - Cumulative number of "My ORCA" Accounts established since "go live".

## 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.

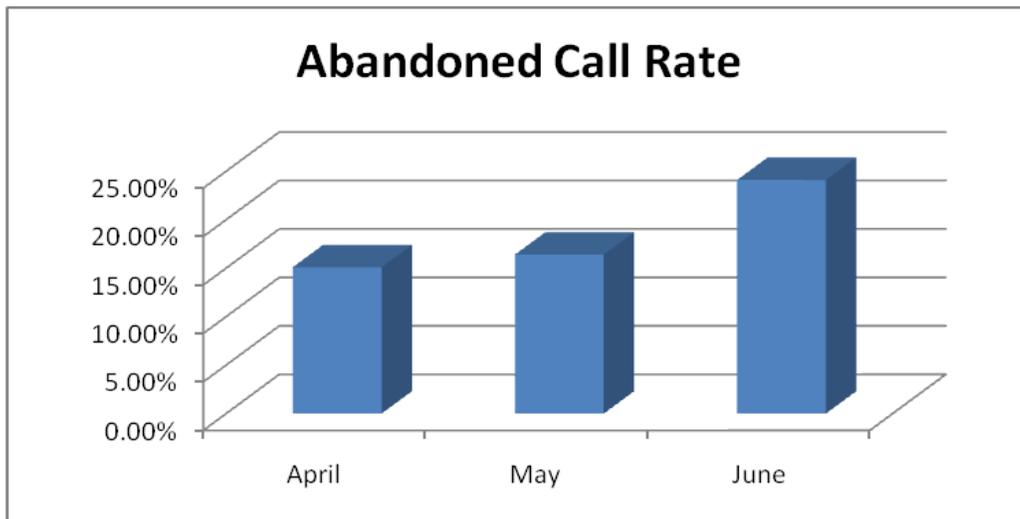
#### i) Answered Calls and Email Contacts

Measure	April	May	June
Number of Calls Answered	8,192	7,027	8,380
Number of Emails Handled	1,442	1,685	1,305
<b>Total</b>	<b>9,634</b>	<b>8,712</b>	<b>9,685</b>

#### ii) Abandoned Calls

Measure	April	May	June
Number of Calls Abandoned*	1,456	1,378	2,666
Abandoned Call Rate	15.1%	16.4%	24.1%

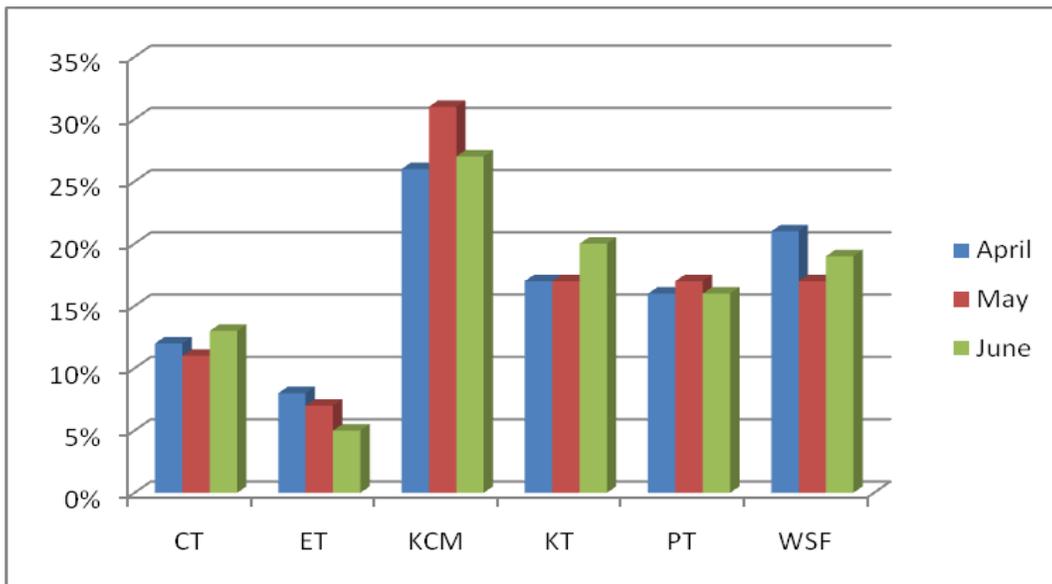
**\*Note:** An “abandoned” call is when a customer hangs up prior to connecting with an agent.



Percentage of Calls Abandoned

**iii) Percentage of calls answered by Agency**

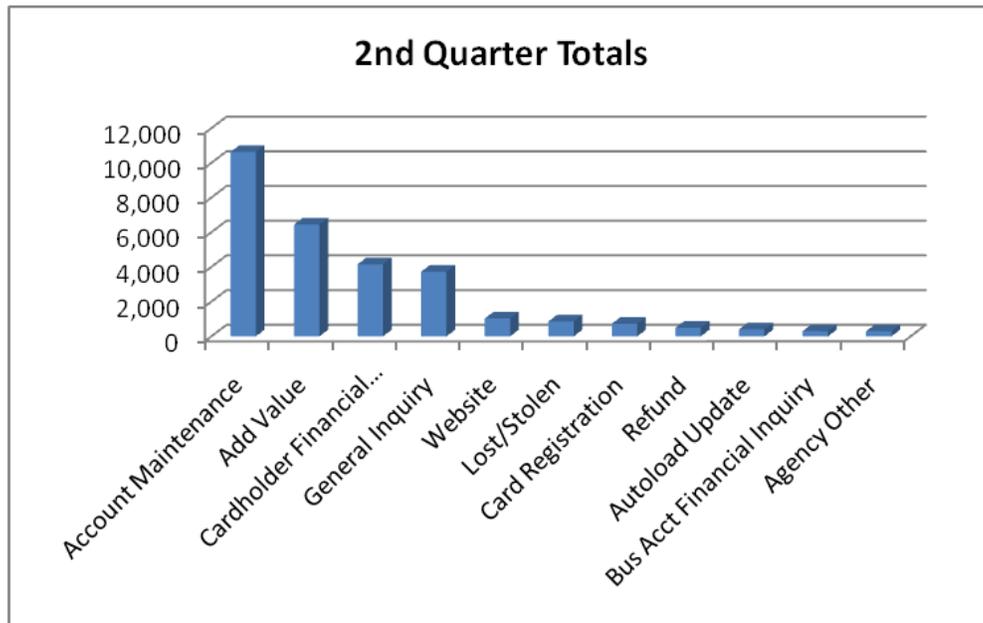
<b>Agency</b>	<b>April</b>	<b>May</b>	<b>June</b>
CT	12%	11%	13%
ET	8%	7%	5%
KCM	26%	31%	27%
KT	17%	17%	20%
PT	16%	17%	16%
WSF	21%	17%	19%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>



**Share of Total Answered Calls by Agency**

iv) ORCA Calls Logged by Reason

Reason Code	April	May	June	Totals
Account Maintenance	3,468	3,514	3,643	10,625
Add Value	2,285	1,918	2,236	6,439
Cardholder Financial Inquiry	1,272	1,196	1,687	4,155
General Inquiry	1,713	1,059	955	3,727
Website	310	295	422	1,027
Lost/Stolen	247	278	329	854
Card Registration	195	180	252	727
Refund	217	140	132	489
Autoload Update	46	132	217	395
<b>Total occurrences</b>	<b>10,249</b>	<b>8,812</b>	<b>9,971</b>	<b>29,032</b>



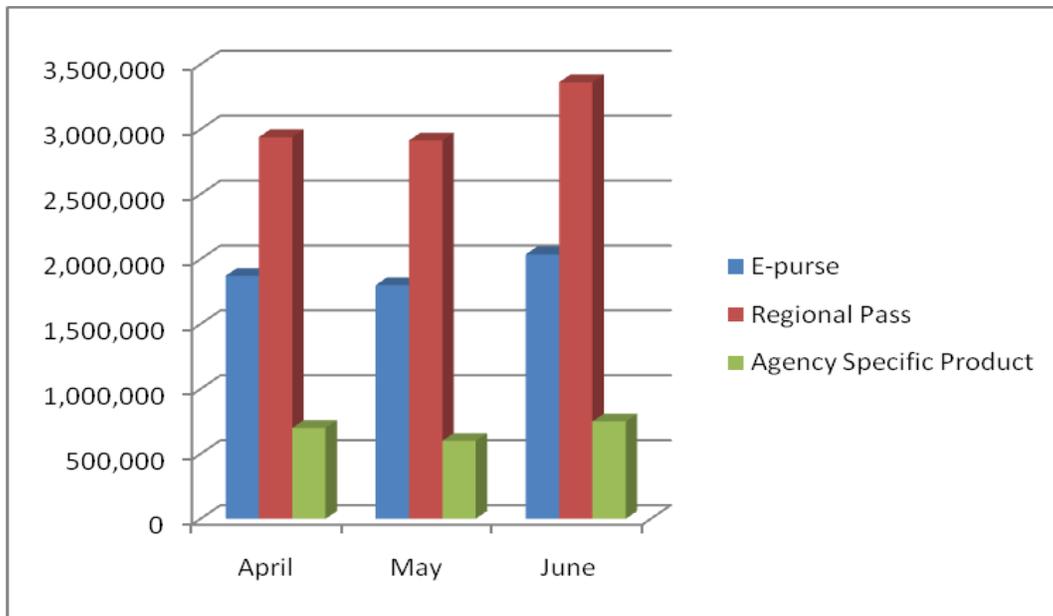
ORCA Calls By Reason Code

## 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 3<sup>rd</sup> party retail outlets.

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

Sales	April	May	June	Total
E-purse	1,870,980	1,799,245	2,036,568	5,706,792
Regional Pass	2,939,375	2,913,696	3,361,734	9,214,805
Agency Specific Product	699,822	600,397	749,553	2,049,772
<b>Total</b>	<b>\$5,510,177</b>	<b>\$5,313,338</b>	<b>\$6,147,855</b>	<b>\$16,971,369</b>

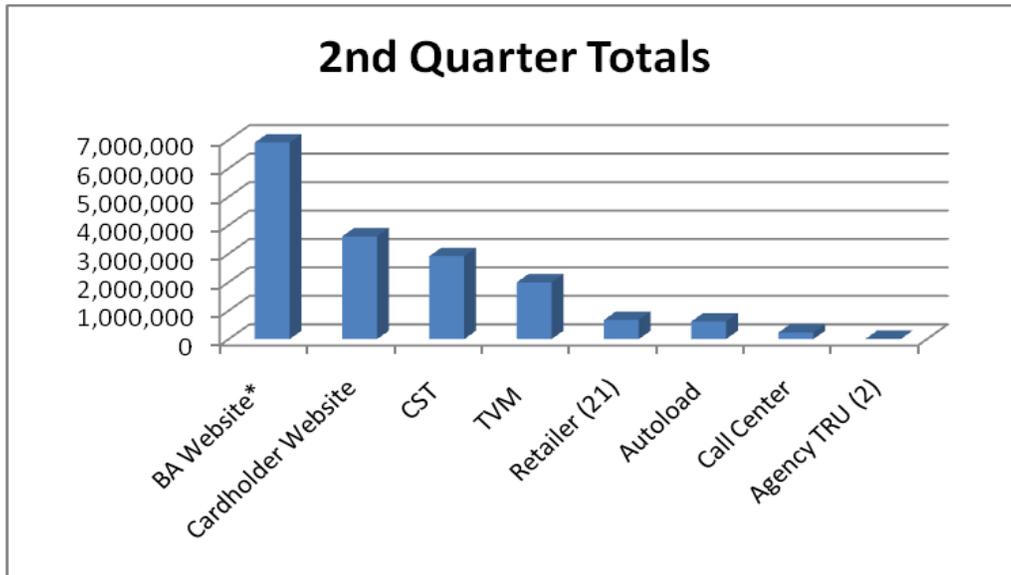


**ORCA Fare Sales by Product Type**

**ii) Sales by Channel**

Sales Channel	April	May	June	Total	% of Total Sales
BA Website*	2,260,346	2,177,111	2,472,212	6,909,669	40.7%
Cardholder Website	1,152,587	1,185,004	1,272,914	3,610,505	21.3%
CST	989,047	841,590	1,086,771	2,917,408	17.2%
TVM	625,633	611,950	757,609	1,995,192	11.8%
Retailer (21)	202,834	217,236	253,560	673,630	4.0%
Autoload	200,589	204,105	214,541	619,235	3.6%
Call Center	74,417	71,689	84,407	230,513	1.4%
Agency TRU (2)	4,724	4,654	5,841	15,219	0.10%
<b>Total</b>	<b>\$5,510,177</b>	<b>\$5,313,339</b>	<b>\$6,147,855</b>	<b>\$16,971,371</b>	<b>100%</b>

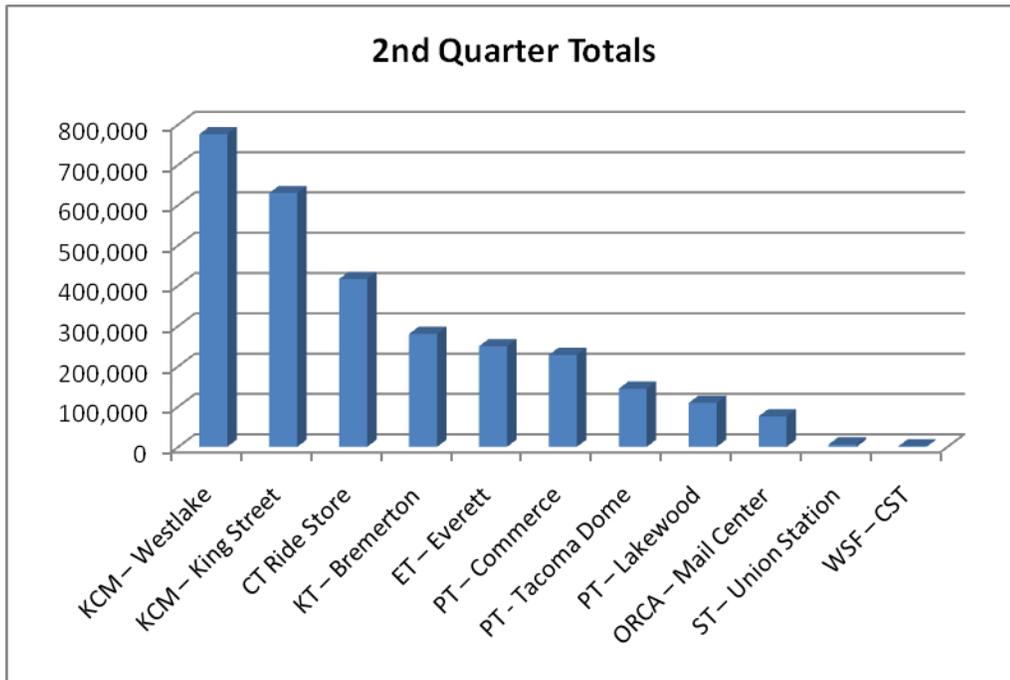
**\*Note:** BA Website does not include any sales of BA Regional Passport products.



**Share of Total ORCA Sales By Channel**

### iii) Monthly Sales at CST Locations

CST Location	April	May	June	Total	% of Total Sales
KCM – Westlake	273,675	220,421	281,726	775,822	26.6%
KCM – King Street	213,571	166,693	249,519	629,783	21.6%
CT - RideStore	128,756	137,588	150,134	416,478	14.3%
KT – Bremerton	93,388	86,164	100,704	280,256	9.6%
ET – Everett	85,656	68,547	95,494	249,697	8.6%
PT – Commerce	81,545	56,804	89,992	228,341	7.8%
PT - Tacoma Dome	50,390	41,110	52,869	144,369	4.9%
PT – Lakewood	34,207	36,756	38,277	109,240	3.7%
ORCA – Mail Center	24,768	25,114	25,837	75,719	2.6%
ST – Union Station	2,246	2,137	1,616	5,999	0.2%
WSF – CST	845	256	603	1,704	0.1%
<b>Total</b>	<b>\$989,047</b>	<b>\$841,590</b>	<b>\$1,086,771</b>	<b>\$2,917,408</b>	<b>100%</b>



**Sales at CST Locations**

**iv) Revenue Generated by BA Passport Product**

<b>Lead Agency</b>	<b>April</b>	<b>May</b>	<b>June</b>
Community Transit	3,710	3,710	3,708
Everett Transit	256	256	1,363
King County Metro	3,967,295	4,092,327	4,138,070
Kitsap Transit	316,007	316,394	306,393
Pierce Transit	8,378	30,478	31,025
<b>Total</b>	<b>\$4,295,646</b>	<b>\$4,443,164</b>	<b>\$4,480,560</b>

**v) Sales by Regional Pass Product**

<b>Pass</b>	<b>April</b>	<b>May</b>	<b>June</b>
Kitsap Transit Full Fare Pass	49,350	46,500	60,650
Kitsap Transit Reduced Fare Pass	40,775	36,300	42,875
Kitsap Transit Worker/Driver Full Fare Pass	1,200	675	1,800
Metro Annual Reduced Fare Pass	43,362	52,866	69,102
Metro Monthly Access Pass	13,284	11,961	12,663
Metro Monthly Reduced Fare Pass	95,420	60,192	111,449
Metro Monthly Vanpool Pass A	32,400	33,696	33,129
Metro Monthly Vanpool Pass B	36,432	36,630	36,135
PT Summer Youth Pass		4,068	22,932
PugetPass \$0.50	8,082	7,740	3,528
PugetPass \$0.75	102,978	87,426	111,699
PugetPass \$1.00	19,692	8,892	3,024
PugetPass \$1.25	9,090	19,755	17,100
PugetPass \$1.50	98,874	64,692	22,950
PugetPass \$1.75	126,882	156,177	259,434
PugetPass \$2.00	238,988	213,912	257,616
PugetPass \$2.25	972,081	955,881	1,101,033
PugetPass \$2.50	232,290	216,720	231,480
PugetPass \$2.75	574,794	570,537	642,609
PugetPass \$3.00	100,440	142,452	212,112
PugetPass \$3.25	21,528	21,060	20,943
PugetPass \$3.50	229,572	226,800	242,676
PugetPass \$3.75	63,855	77,085	84,105
PugetPass \$4.00	14,832	14,544	16,272
PugetPass \$4.25	54,621	59,211	61,353
PugetPass \$4.50	43,416	42,768	44,388
PugetPass \$4.75	27,360	28,044	29,412
WSF Central Sound Monthly Pass	347,481	276,624	316,823
WSF Fautleroy-Southworth Monthly Pass	12,213	12,349	13,163
WSF Mukilteo-Clinton Monthly Pass	18,900	17,535	18,743
WSF Vashon Island Monthly Pass	9,006	11,001	10,089
<b>Grand Total</b>	<b>\$3,639,198</b>	<b>\$3,514,093</b>	<b>\$4,111,287</b>

NOTE: Previous reports used PugetPass apportionment data. Since this section deals with sales data, the data used from the 2<sup>nd</sup> Quarter Report forward will be from the sales that occurs within the corresponding month, not apportioned values.

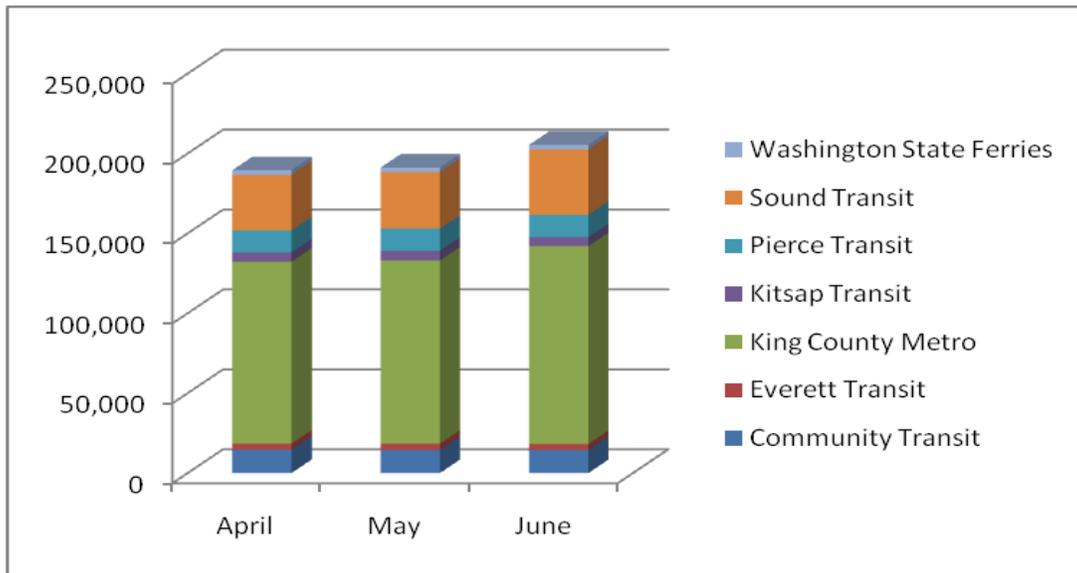
### c) System Operations - Ridership Transactions/Boardings

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	April	May	June
Community Transit	14,614	14,492	14,522
Everett Transit	3,818	3,907	3,705
King County Metro	113,894	114,657	123,743
Kitsap Transit	5,709	6,030	5,673
Pierce Transit	13,723	13,865	13,941
Sound Transit	34,908	35,471	40,990
Washington State Ferries	2,827	2,762	2,809
<b>Total</b>	<b>189,493</b>	<b>191,184</b>	<b>205,383</b>

NOTE: Average weekday boardings may be understated due to holidays.



**Agency Shares of Total Monthly ORCA Boardings**

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

<b>Agency</b>	<b>Average Weekday ORCA Boardings June</b>	<b>Average Weekday Total Boardings (ORCA &amp; Non-ORCA) June</b>	<b>% of Average Weekday ORCA Boardings June</b>
Community Transit	14,522	28,836	50.4%
Everett Transit	3,705	7,792	47.6%
KCM	123,743	356,652	34.7%
Kitsap Transit	5,673	12,472	45.5%
Pierce Transit	13,941	40,535	34.4%
Sound Transit Bus	27,276	30,591	89.2%
Sound Transit Sounder	6,527	7,301	89.4%
Sound Transit Link	7,187	14,923	48.2%
Washington State Ferries	2,809	8,225	34.2%
<b>Total</b>	<b>202,574</b>	<b>499,102</b>	<b>40.6%</b>

**iii) ORCA Boardings by Product Type**

<b>Boardings*</b>	<b>April</b>	<b>May</b>	<b>June</b>	<b>Total</b>	<b>% of Total Boardings</b>
E-purse	1,126,406	1,109,045	1,174,637	3,410,088	23.73%
Agency Specific Pass	631,080	643,583	691,918	1,966,581	13.68%
Regional Pass	1,665,576	1,630,345	1,644,121	4,940,042	34.37%
Regional Bus & Train Passport	1,256,733	1,277,289	1,521,833	4,055,855	28.22%
<b>Total</b>	<b>4,679,795</b>	<b>4,660,262</b>	<b>5,032,509</b>	<b>14,372,566</b>	<b>100.00%</b>

**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**

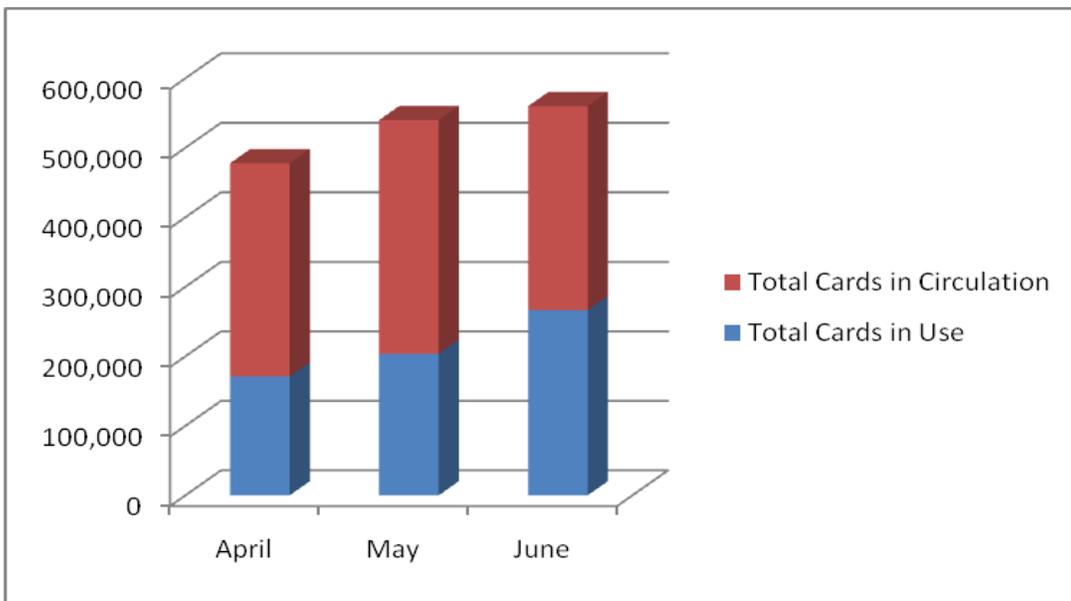
This section provides information on issued ORCA cards and the actual usage of ORCA cards on Agency services. This information helps Agencies track ORCA card use and assist in their evaluation of their card distribution/outreach strategies. Cards in circulation are the cards that have been issued but may not have been used during the quarter.

**i) Cumulative Number of Issued Cards in Circulation**

Card Type	April	May	June
Standard(Adult/Youth) Cards	427,094	480,745	498,338
RRFP Cards	50,764	59,131	61,528
<b>Total</b>	<b>477,858</b>	<b>539,876</b>	<b>559,866</b>

**ii) Cards in Use by Month**

Cards in Use	April	May	June
<b>Total</b>	<b>170,972</b>	<b>203,891</b>	<b>266,531</b>



**Issued Cards in Circulation and In Use**

## 6. 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

## 7. 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