



Quarterly Program Management Report

4th Quarter

October, November, and December 2009

Date Report Issued: 2-8-2010

Table of Contents

1. Report Purpose.....	1
2. Customer Service Equipment & Facilities.....	2
3. Key Activities - Reporting Period	3
4. Key Activities - Planned for Next Quarter	4
5. Overview of Customer Activity & Contacts	5
6. System Operations Performance Data	6
a) System Operations - Regional Customer Contact.....	6
b) System Operations - Sales by Fare Product Type and Sales Channel/Location	9
c) System Operations - Ridership Transactions/Boardings.....	13
d) System Operations - ORCA Cards in Circulation and in Use by Type	16
7. Data Sources	17
8. Acronyms.....	17

1. Report Purpose:

The primary audience for this report is the Joint Board. The report purpose is to provide a high level quarterly overview of key system performance components that focus on customer-facing activities. Initially, the report will be most 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as the deployment of marketing resources, to identify trends or issues that require further research, and to provide a historical reference.

2. Customer Service Equipment & Facilities:

Purpose: This table illustrates the significant scope, relative to equipment quantities and customer facilities, which support the regional program deployment.

The figures noted are correct as of December **31, 2009**:

ORCA Resource	In Service
Buses with On Board Equipment <ul style="list-style-type: none"> • CT • ET • KCM • KT • PT • ST 	276 49 1,340 90 267 243
Portable Fare Transaction Processor <ul style="list-style-type: none"> • CT • KCM • KT Ferry • Link • PT • Sounder • WSF 	6 50 8 20 80 8 37
Stand Alone FTP- Equipped Stations <ul style="list-style-type: none"> • Sounder • Link • Swift 	59 76 1
3 rd Party Revalue Retailer Sites	10
Ticket Vending Machines <ul style="list-style-type: none"> • Sounder Stations • Link Stations 	32 61
Customer Service Offices	9 Agency CSO's with 22 CSTs.
WSF Turnstiles/Tollbooths	91

3. Key Activities - Reporting Period: 4th Quarter

Date	Activity
September 28 – October 9	Maintenance Release 7 in RTB for User Testing
October 22	ERG FSA Milestone #1 Report due
October 25	Maintenance Release 7 Release to Production Complete
October 26	Joint Board Special Meeting
November 9	Joint Board Meeting
November 16 – December 2	Maintenance Release 8 in RTB for User Testing
November 30	Community Transit BRT Swift Revenue Service Commences
December 1	Agencies submit new card order (108, 000)
December 9	Maintenance Release 8 Release to Production Complete
December 14	Joint Board Meeting
December 19	Sound Transit Link Light Rail Service to SeaTac Commences

4. Key Activities - Planned for Next Quarters

Date	Activity
January 1	Termination of intersystem <i>cash</i> transfers
January 11	Joint Board Meeting
February 8	Joint Board Meeting
February 1 - 19	Maintenance Release 9 in RTB for User Testing
February 19	ERG delivers card order (108,000)
February 26	Maintenance Release 9 Release to Production Complete
February 26	ERG submits SAS 70 Type 1 Audit Report
March 1	Customer card fees commence
March 8	Joint Board Meeting
April 5 – 23	Maintenance Release 10 in RTB for User Testing
April 12	Joint Board Meeting
April 30	Maintenance Release10 Release to Production Complete
TBD	Agencies issue full NAC for Complete System Commissioning Milestone
TBD	Schedule for “New Work” Release 5
TBD	Commencement of “Beneficial Use” Operating Support Payments
TBD	ERG FSA Reporting Milestone #2
TBD	ERG FSA Milestone #2 Report due
TBD	ERG FSA Reporting Milestone #3
TBD	ERG FSA Milestone #3 Report due
TBD	Agencies issue Full System Acceptance Notice & Payment Balance
On-going thru 2010	Business Account & RRF conversion

5. Overview of Customer Activity & Contacts:

Purpose: This table illustrates ORCA customer activities and contacts. We expect this activity volume to increase commensurate with the number of cards in circulation. Any reversal in this trend, or unusual activity spikes, will be the subject of further research.

Measure	October	November	December
Transaction Volume:			
Number of Fare Transactions/Boarding on All Services	1,518,818	1,623,058	1,951,265
Number of Cards in Use	63,853	74,363	86,213
Autoload Activity:			
Number of Autoload Accounts Established	842	654	725
Autoload Transactions (load on autoload accounts)	\$91,164	\$99,780	\$112,170
Call Volume:			
ORCA Regional Call Center Calls (Tier 1)	5,249	5,078	8,095
ESB Call Center Calls (Tier 2) *	30	20	33
Cardholder Website Traffic:			
Unique Visitors *	27,174	30,158	43,619
Visits*	59,721	63,431	90,904
Number of "My ORCA" Accounts Established	16,300	12,860	20,840
Card Holder Website Transactions	\$513,400	\$585,082	\$784,061

Notes:

***Tier 2 Calls** – ERG provides "Tier 2" technical support service to Agency Customer Service Representatives (CSR). A "Tier 1" call is taken directly by Agency personnel from an ORCA customer. The Tier 2 calls reported are the number of calls initiated by Agency staff.

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

***Visits** - Number of web hits made by all visitors

6. System Operations Performance Data:

a) System Operations - Regional Customer Contact

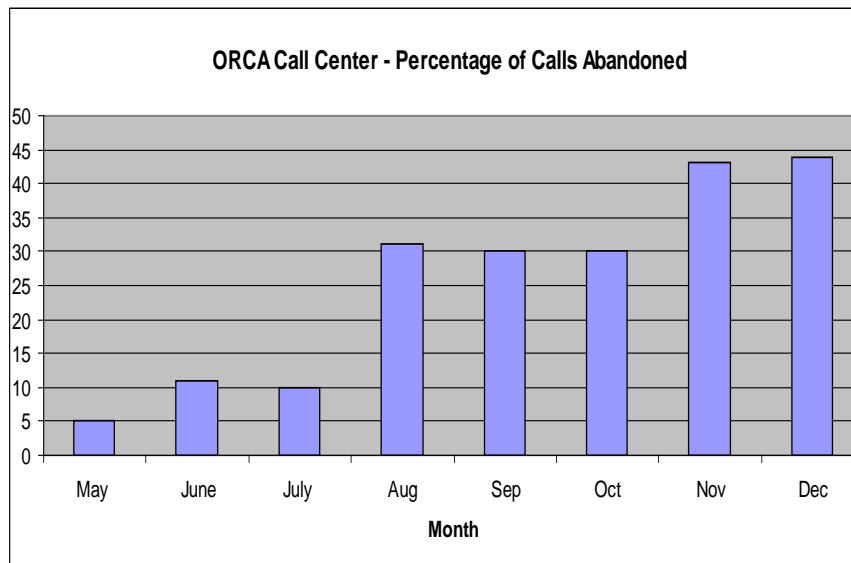
Purpose: This section illustrates Regional Call Center activities. The Regional Call Center and “Contact ORCA” emails are the primary point of customer contact. The Quarterly Program Management Report monitors performance at the regional and Agency level for calls handled or abandoned. The reason codes from the Call Center and Contact ORCA emails allow identification of trends and issues impacting cardholders.

i) Answered/Abandoned Calls and Email Contacts

Measure	October	November	December
Number of Calls Answered	5,249	5,078	8,095
Number of Calls Abandoned*	2,254	3,825	6,335
Number of Emails Handled	1,785	1,536	2,279
Total	9,288	10,439	16,709

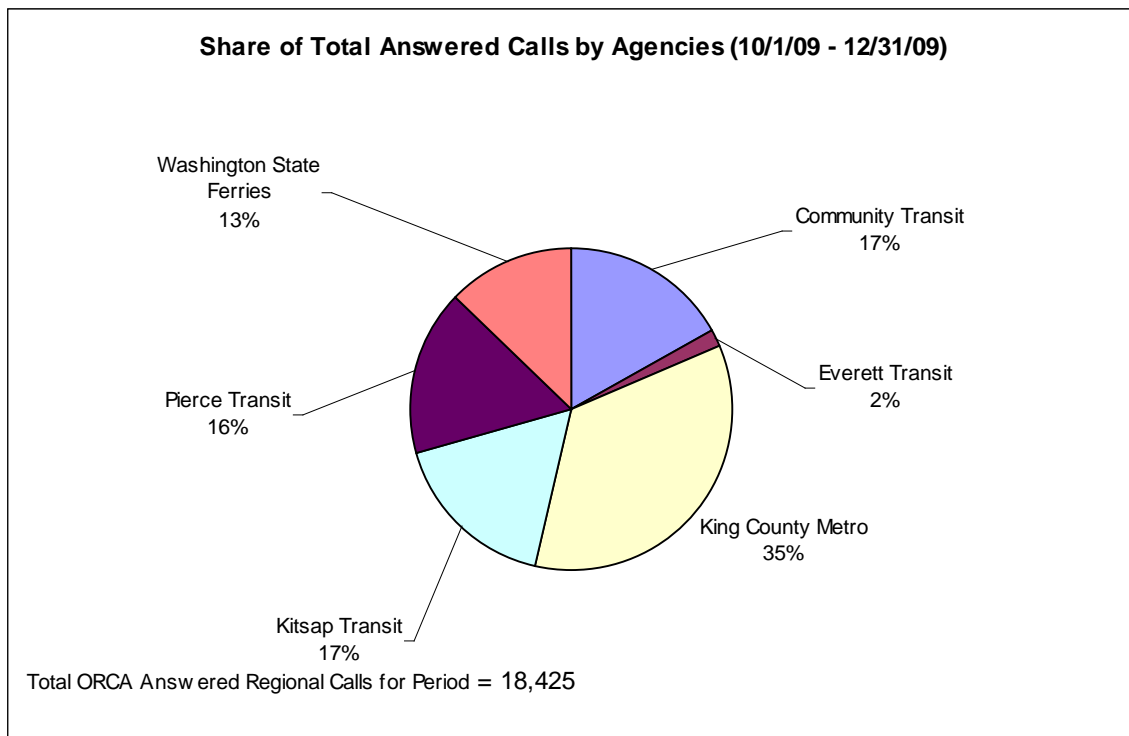
***Note:** An “abandoned” call is designated as such when a customer hangs up prior to connecting with an agent.

ii) Percentage of Calls Abandoned for ORCA Call Center



iii) Percentage of calls answered by Agencies

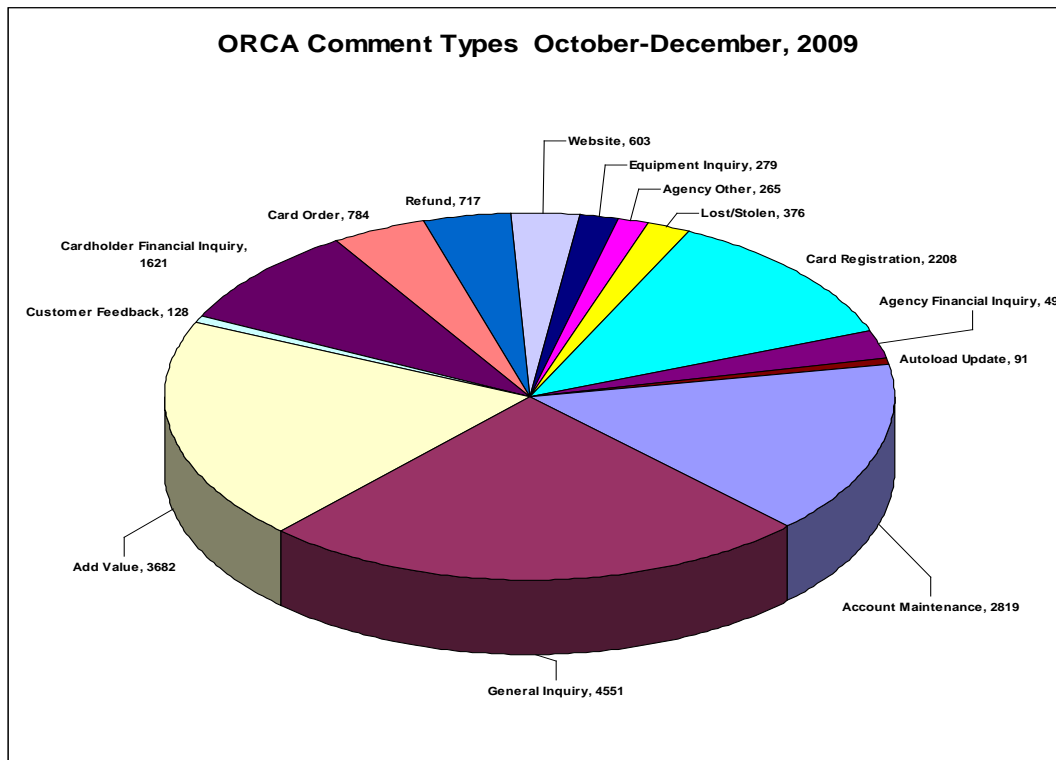
Agency	October %	November %	December %
CT	14	14	21
ET	6	0	0
KCM	38	37	31
KT	17	19	16
PT	15	17	17
WSF	16	13	15
Total	100%	100%	100%



iv) ORCA Calls Logged by Reason

Note: The highest and lowest call reasons are highlighted

Reason Code	October	November	December	Totals
Account Maintenance	809	866	1,144	2,819
General Inquiry	1045	1,529	1,977	4,551
Add Value	863	1,132	1,687	3,682
Customer Feedback	45	39	44	128
Cardholder Financial Inquiry	418	484	719	1,621
Card Order	106	192	486	784
Refund	206	204	307	717
Website	110	192	301	603
Equipment Inquiry	100	85	94	279
Agency Other	51	93	121	265
Lost/Stolen	71	130	175	376
Card Registration	1,621	206	381	2,208
Agency Financial Inquiry	42	123	329	494
Autoload Update	25	35	31	91
Total occurrences	5,512	5,310	7,796	18,618



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

Purpose: This section illustrates total ORCA fare product sales distributed by e-purse and pass and sales by location/channel. This information may support decisions such as the deployment of customer information/marketing resources or the management of the 3rd party retail outlet program.

i) ORCA E-purse and Pass Sales

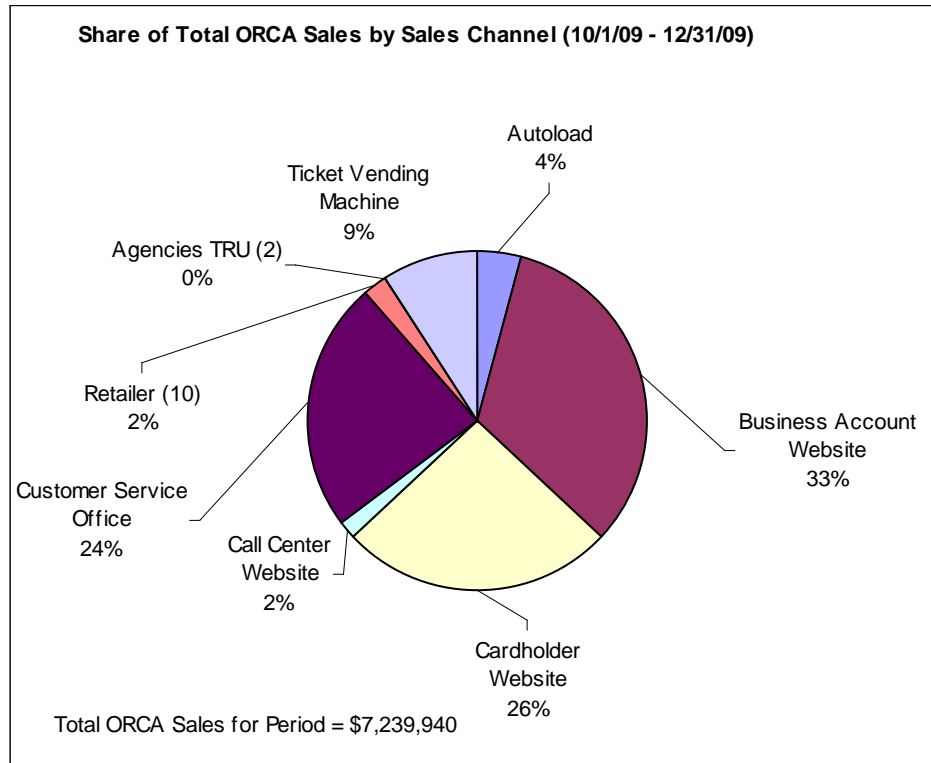
Sales	October	November	December	Total
E-purse	\$753,394	\$769,745	\$1,174,533	\$2,697,672
Pass	\$976,305	1,194,606	\$2,371,357	\$4,542,268
Total	\$1,729,699	\$1,964,351	\$3,545,890	\$7,239,940

ii) Sales by Sales Channel

Note: The most/least used sales channels are highlighted. BA Website does not include any sales of BA Passport products.

Sales Channel	October	November	December	Total	% of Total Sales
Autoload	\$91,164	\$99,780	\$112,170	\$303,114	4.2
BA Website*	\$528,530	\$572,047	\$1,273,709	2,374,286	32.8
Cardholder Website	\$513,400	\$585,082	\$784,061	\$1,882,543	26.0
Call Center	\$27,357	\$24,697	\$74,946	\$127,000	1.7
CST	\$388,050	\$456,113	\$889,486	\$1,733,649	23.9
Retailer (10)	\$21,119	\$36,245	\$101,657	\$159,021	2.2
Agencies TRU (2)	\$1,142	\$2,103	\$1,835	\$5,080	0.1
TVM	\$158,937	188,284	\$308,026	\$655,247	9.2
Total	\$1,729,699	\$1,964,351	\$3,545,890	\$7,239,940	100%

iii) Share of Total Sales by Sales Channel

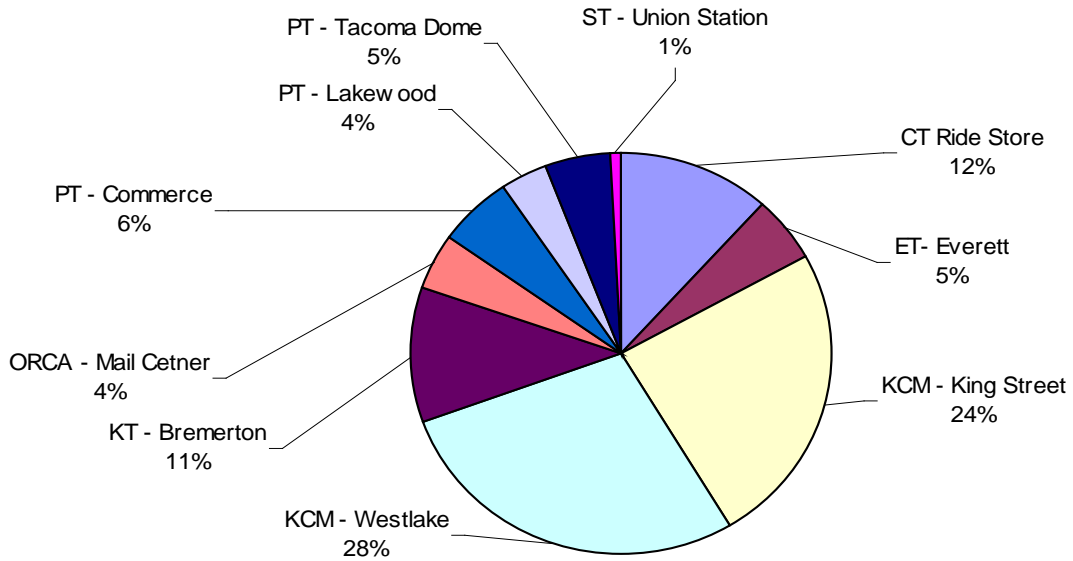


iv) Monthly Sales at CST Locations

Note: The CST locations generating the most/least sales are highlighted

CST Location	October	November	December	Total
CT Ride Store	\$45,220	\$58,100	\$98,044	\$201,364
ET - Everett	\$20,340	\$22,686	\$47,635	\$90,661
KCM – King Street	\$95,448	101,362	\$227,201	\$424,011
KCM – Westlake	\$107,466	\$126,725	\$253,713	\$487,904
KT – Bremerton	\$50,650	\$58,454	\$79,570	\$188,674
ORCA – Mail Center	\$19,476	\$19,706	\$34,605	\$73,787
PT – Commerce	\$14,206	\$25,675	\$61,543	\$101,424
PT – Lakewood	\$10,999	\$19,356	\$35,052	\$65,407
PT - Tacoma Dome	\$16,161	\$21,060	\$49,711	\$86,932
ST – Union Station	\$7,948	\$2,651	\$2,409	\$13,008
WSF - CST	\$136	\$338	\$0	\$474
Total	\$388,050	\$456,113	\$889,486	\$1,733,649

Share of CST Sales by Location (10/1/09 - 12/31/09)



Total CST Sales for Period = \$1,733,649

v) Revenue Generated by BA Passport Product

Note: The information is provided by the Lead Agency

Lead Agency	October	November	December
Community Transit	\$0	\$19,658	\$22,545
Everett Transit	\$138	\$138	\$138
King County Metro	\$936,534	\$936,534	\$936,534
Kitsap Transit	\$305,703	\$305,703	\$305,703
Pierce Transit	\$0	\$0	\$0
Washington State Ferries	\$0	\$0	\$0
Total	\$1,242,375	\$1,262,033	\$1,264,920

vi) Revenue Generated by Pass Product

Note: The most/least purchased fare products are highlighted.

Pass	October	November	December
KT Full Fare	\$22,200	\$30,550	\$39,600
KT Reduced Fare	\$17,175	\$15,050	\$20,625
KT Worker Driver Full Fare	\$6,475	\$900	\$1,500
Metro Annual Reduced Fare	\$21,447	\$27,720	\$132,066
Metro Monthly Access	\$9,369	\$8,532	\$14,040
Metro Monthly Reduced Fare	\$26,766	\$27,045	\$46,395
Metro Monthly Vanpool (A)	\$2,088	\$3,240	\$34,353
Metro Monthly Vanpool (B)	\$10,170	\$11,970	\$41,454
PugetPass \$0.50	\$3,474	\$3,798	\$6,084
PugetPass \$0.75	\$19,630	\$26,109	\$53,838
PugetPass \$1.00	\$2,916	\$10,908	\$5,652
PugetPass \$1.25	\$3,060	\$3,105	\$5,490
PugetPass \$1.50	\$15,390	\$19,386	\$49,464
PugetPass \$1.75	\$57,015	\$80,325	\$103,446
PugetPass \$2.00	\$218,952	\$264,600	\$208,944
PugetPass \$2.25	\$1,296	\$2,997	\$512,244
PugetPass \$2.50	\$191,790	\$229,410	\$192,510
PugetPass \$2.75	\$3,366	\$15,444	292,050
PugetPass \$3.00	\$26,325	\$35,856	\$65,016
PugetPass \$3.25	\$4,212	\$3,978	\$9,126
PugetPass \$3.50	\$73836	\$93,744	\$138,600
PugetPass \$3.75	\$19,980	\$27,740	\$39,950
PugetPass \$4.00	\$5,472	\$6,624	\$11,376
PugetPass \$4.25	\$20,349	\$26,469	\$40,851
PugetPass \$4.50	\$14,418	\$16,038	\$27,702
PugetPass \$4.75	\$12,825	\$16,587	\$21,204
WSF Central Sound Monthly	\$153,382	\$171,487	\$225,734
WSF Fauntleroy – Southworth Monthly	\$4,528	\$5,157	\$11,467
WSF Mukilteo – Clinton Monthly	\$3,746	\$3,938	\$12,653
WSF Vashon Island Monthly	\$4,625	\$6,099	\$7,923
Total	\$976,305	\$1,194,606	2,371,357

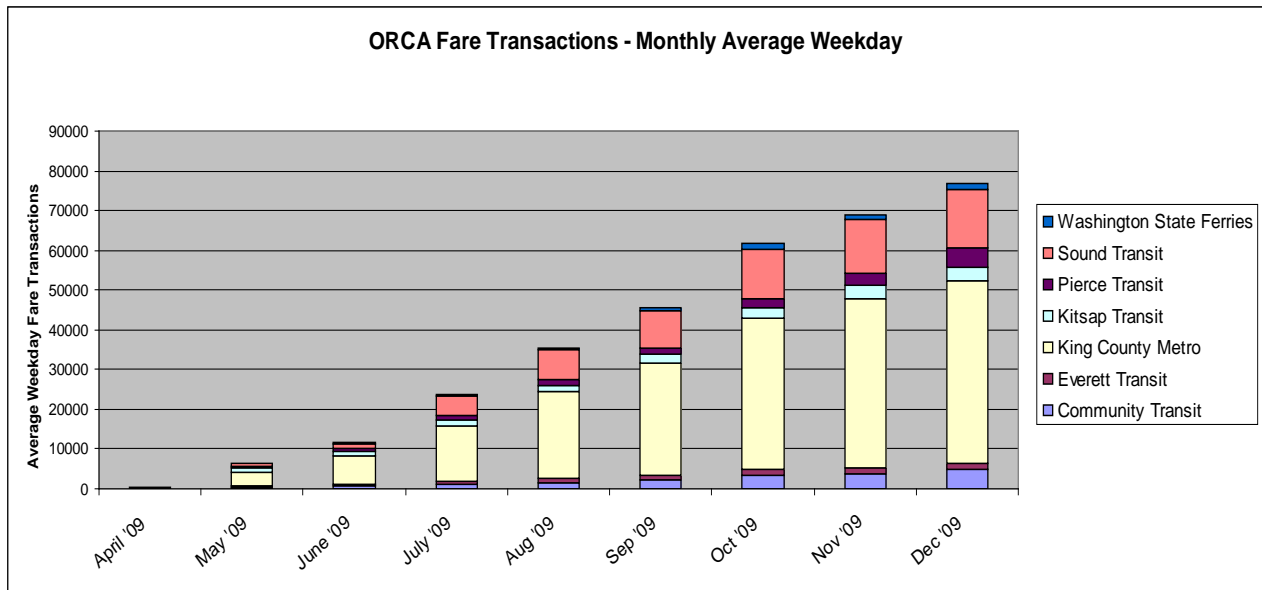
c) System Operations - Ridership Transactions/Boardings

Purpose: This section illustrates 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/analysis of Agency cost shares of regional operating expenses.

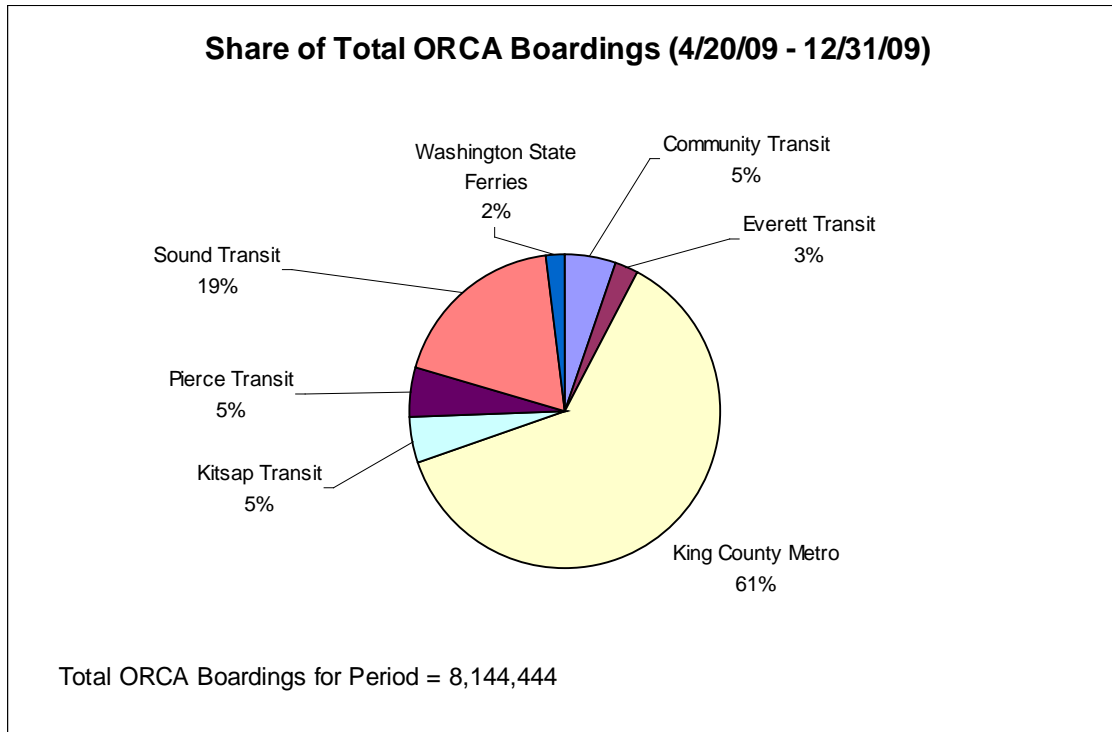
i) Average Weekday ORCA Boardings by Month

Note: The highest/lowest number of boardings is highlighted

Agency	October	November	December
Community Transit	3,313	3,871	4,871
Everett Transit	1,516	1,565	1,557
King County Metro	38,031	42,432	45,901
Kitsap Transit	2,814	3,375	3,312
Pierce Transit	2,333	3,058	4,955
Sound Transit	12,346	13,380	14,671
Washington State Ferries	1,228	1,364	1,390
Total	61,581	69,045	76,657



ii) Agency Shares of Total Monthly ORCA Boardings



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

Note: The highest/lowest % of total boardings are highlighted

Agency	Average Weekday ORCA Boardings December	Average Weekday Total Boardings (ORCA and Non-ORCA) December	% of Average Weekday ORCA Boardings December
Community Transit	4,871	29,500	16.5
Everett Transit	1,557	6,780	23.0
KCM	45,901	336,000	13.7
Kitsap Transit	3,312	12,218	27.1
Pierce Transit	4,955	37,082	13.3
Sound Transit Bus	9,716	42,424	22.9
Sound Transit Sounder	2,375	8,418	28.2
Sound Transit Link	2,580	14,913	17.3
WSF Ferries	1,390	8,958	15.5

iv) ORCA Boardings by Product Type

Note: The highest % of total boardings is highlighted. The Boardings by Product can be higher than actual boardings because sometimes multiple products are used for one boarding.

Boardings	October	November	December	Total	% of Total Boardings
E-purse	359,207	376,411	477,717	1,213,335	24
Agency Specific Pass	268,871	272,483	307,203	848,557	17
PugetPass	315,563	379,548	505,484	1,200,595	23
Regional Bus & Train Passport	584,958	605,145	673,010	1,863,113	36
Total	1,528,599	1,633,587	1,963,414	5,125,600	100%

v) Business Account Boardings

Boardings	October	November	December	Total
Total Number of Boardings on all Services	1,518,818	1,623,058	1,951,265	5,093,141
Business Account Boardings	656,845	727,432	816,156	2,200,433
<i>Business Account Boardings as a Percentage of the Total</i>	43%	45%	42%	43%

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

Purpose: The purpose of this section is to provide information on issued ORCA cards in the hands of customers and the relationship to the actual usage of their ORCA cards on Agencies services. This information will help the Agencies track ORCA card use and evaluate their card distribution/outreach strategies.

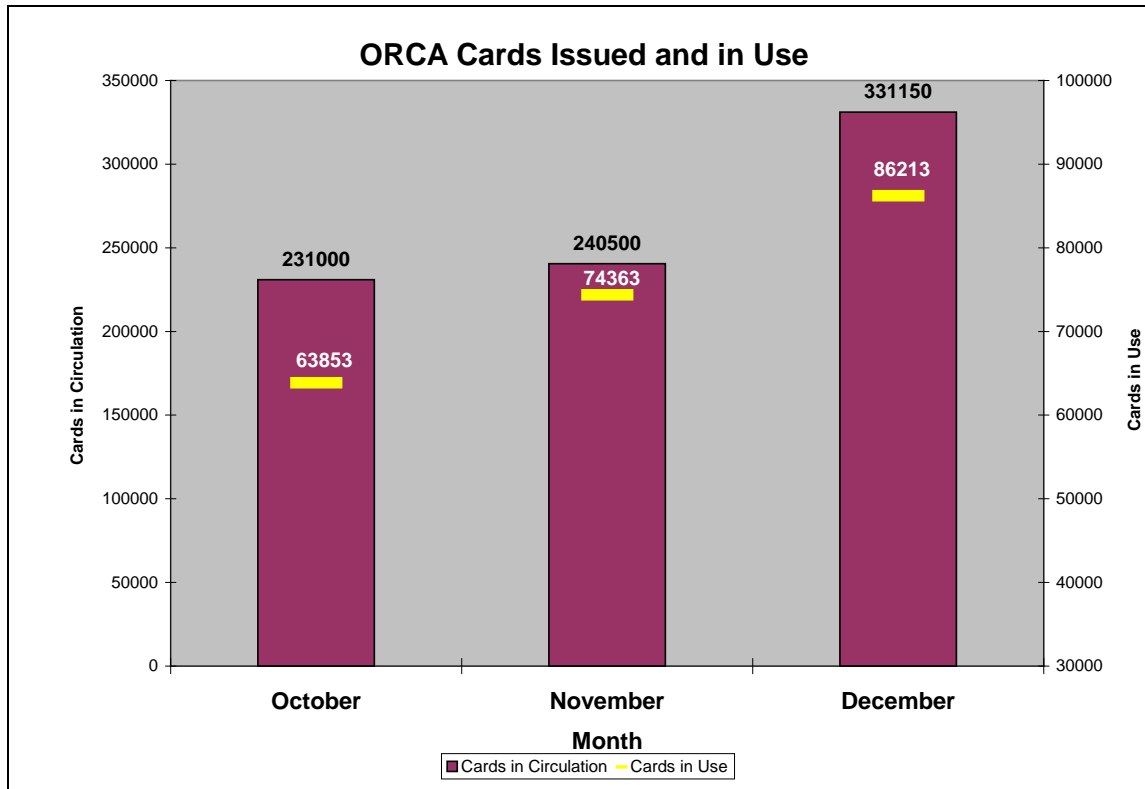
i) Cumulative Number of Issued Cards in Circulation since April 20, 2009

Card Type	October 31	November 30	December 31
Standard(Adult/Youth) Cards	207,000	213,000	297,200
RRFP Cards	24,000	27,500	33,950
Total	231,000	240,500	331,150

ii) Cards in Use by Month

Cards in Use	October	November	December
Total	63,853	74,363	86,213

iii) Cumulative Number of Issued Cards in Circulation and Monthly Cards in Use



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
CIPP	Card Initialization, Personalization and Printing
CST	Customer Service Terminal
CT	Community Transit
DDU	Driver Display Unit
ET	Everett Transit
FTP	Fare Transaction Processor
GAK	Gate Adaption Kit
KCM	King County Metro
KPI	Key Performance Indicator
KT	Kitsap Transit
LDM	Load Dump Module
OBE	On-Board Equipment
OBFTP	On-Board Fare Transaction Processor
ORCA	One Regional Card for All
PFTP	Portable Fare Transaction Processor
PT	Pierce Transit
RCU	Radio Control Unit
RRFP	Regional Reduced Fare Permit
RTB	Regional Test Bed
SAFTP	Stand-Alone Fare Transaction Processor
ST	Sound Transit
TRU	Terminal Revalue Unit
TVM	Ticket Vending Machine
WDOLS	Wireless Data On/Off Load System
WSF	Washington State Ferries

