

**Board Report**

---

**File #:** 2016-0994, **File Type:** Budget**Agenda Number:** 15.

---

**PLANNING AND PROGRAMMING COMMITTEE  
FEBRUARY 15, 2017****SUBJECT: BIKE SHARE PROGRAM TAP STEP 3A INTEGRATION****ACTION: ESTABLISH LIFE OF PROJECT BUDGET FOR BIKE SHARE TAP STEP 3A  
INTEGRATION****RECOMMENDATION**

ESTABLISH the Life of Project (LOP) budget for **Bike Share TAP Step 3A Integration** in the amount of \$1.65 million

**ISSUE**

At the November 2015 meeting, the Metro Board authorized the phased Regional Bike Share Integration Strategy to create a seamless user experience with the TAP Program (Attachment A). Two steps of Bike Share TAP integration were completed in time for the launch of the Downtown Los Angeles Pilot Bike Share in July 2016.

At the November 2016 meeting, in order to complete Step 3 - Seamless User Integration, the Metro Board awarded a contract to Vertiba Inc. to enhance the current TAP Customer Relationship Management (CRM) system such that it may accommodate Bike Share account management (Attachment B). Also at the November 2016 meeting, the Metro Board adopted a strategy to implement Step 3A - Bike Share TAP account and payment integration through TAP CRM enhancements. Staff is in the process of finalizing a contract modification with Bicycle Transit Systems (BTS) to perform changes to the existing Bike Share system to support Bike Share TAP Step 3A Integration. Board authorization to establish a LOP is requested to support this effort.

**DISCUSSION**

Board approved Step 3A Integration includes interoperability between Bike Share and transit, allowing for integration with other systems like Metro Bike Hubs, parking, ride sharing and other multi-mobility services. To achieve this functionality, the existing TAP CRM known as TAPforce will be further developed to enable account management for services outside of the Metro transit system. This enhanced TAPforce system will store and process information that will enable payment and delivery of benefits through TAP across a variety of different systems and will be accessible to patrons through an enhanced website and call center communications. The existing account data, management and payment processing functions of Bike Share, currently within the TAP BTS CRM,

will be transferred to TAPforce. The existing Bike Share CRM will need to be modified to work in tandem with TAPforce, communicating in real time to allow system users to access bikes, manage their accounts, and provide for customer service access.

Together, the enhanced TAPforce and BTS systems will enable customers to seamlessly use Bike Share, transit, and other supporting transportation services for multimodal travel. Countywide Planning Department has worked closely with TAP Operations and consulted with the BTS technical team to develop integration strategies for Step 3A, which will result in the following functionality:

- › Exchange of data for purse and account information. Account balance may be shared for multiple uses (i.e. Bike Share, parking, or other).
- › Enable transfers and discounts between Metro transit, Bike Share and other bicycle services.
- › Enable reciprocity between multiple bike share systems. Bike share vendors would still need to develop their own communications protocols with TAP for the exchange of real-time data.
- › Request credentials other than a credit card (e.g., a driver's license) to potentially prepare for cash payments for Bike Share and other bike services in the future.

Staff continues to explore the option for cash payments for Bike Share.

The cities of Santa Monica, Long Beach, Beverly Hills and West Hollywood and their bike share vendors have also participated in planning to understand integration needs and abilities for Step 3. Though the TAPforce enhancements will be designed to accommodate integration with any bike share system, each system will be responsible for the cost of enhancing its respective bike share CRM to integrate with TAPforce. Business rules and transfer policies will need to be developed for any features involving reciprocity between agencies.

### Findings

Based on the direction previously received from the Metro Board and detailed cost estimates from Vertiba Inc. and BTS, staff proposes adoption of a LOP in the amount of \$1.65 million to support this capital project development. Board action in November 2016 authorized the award of a contract to Vertiba to perform TAP CRM enhancements, including those that allow Bike Share integration. This LOP will support both the Vertiba and BTS work to achieve Board-directed Bike Share TAP integration.

### **DETERMINATION OF SAFETY IMPACT**

Implementing a Bike Share TAP integration strategy will not have any adverse safety impacts on Metro employees and patrons.

### **FINANCIAL IMPACT**

Bike Share TAP Step 3A Integration costs are estimated to be up to \$1.65 million over two fiscal years (Attachment C). The estimated development costs for FY17 are \$700,000 and are included in the budget under Cost Center 4320. Since this is a multi-year project, the cost center managers, project manager and Chief Planning Officer will be responsible for budgeting the costs in future years, including any phase(s) the Board authorizes to be exercised.

Impact to Budget

The source of funds for the Step 3A Integration is Prop C 40% in FY17. This source is eligible for bus and rail operations. Should active transportation eligible funds be available as the project progresses, staff will replace the Prop C 40% with these other funds to alleviate the strain on operations eligible funds.

**ALTERNATIVES CONSIDERED**

The Board may choose not to establish a capital project and LOP for Bike Share TAP Integration. This choice is not recommended due to the increasing need for integration with new technologies and systems to support multimodal travel. If no LOP is established for this integration, Bike Share will not be able to achieve a seamless customer experience as directed by previous Metro Board actions.

**NEXT STEPS**

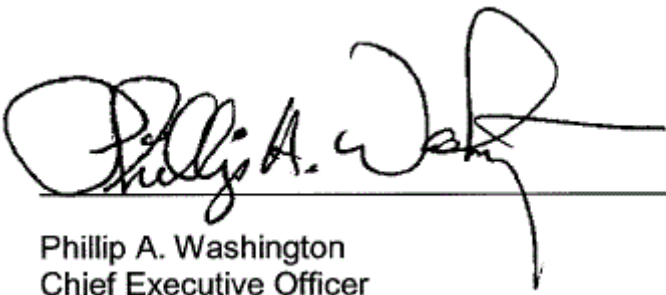
With Board approval to establish this LOP, staff will execute a contract modification with BTS and work with TAP on directing Vertiba Inc. to implement Step 3A. Staff will continue development of Step 3B for multimodal mobile ticketing and report back to the Board in the fall of 2017.

**ATTACHMENTS**

- Attachment A - November 2015 Board Report
- Attachment B - November 2016 Board Report
- Attachment C - LOP Budget and Funding Plan
- Attachment D - Presentation: Bike Share/Tap Integration Step 3

Prepared by: Julia Salinas, Transportation Planning Manager, (213) 922-7413  
Laura Cornejo, Deputy Executive Officer, (213) 922-2885  
Cal Hollis, Senior Executive Officer, (213) 922-7319

Reviewed by: Therese W. McMillan, Chief Planning Officer, (213) 922-7077



---

Phillip A. Washington  
Chief Executive Officer