



# Special Meeting | ORCA Joint Board Workshop

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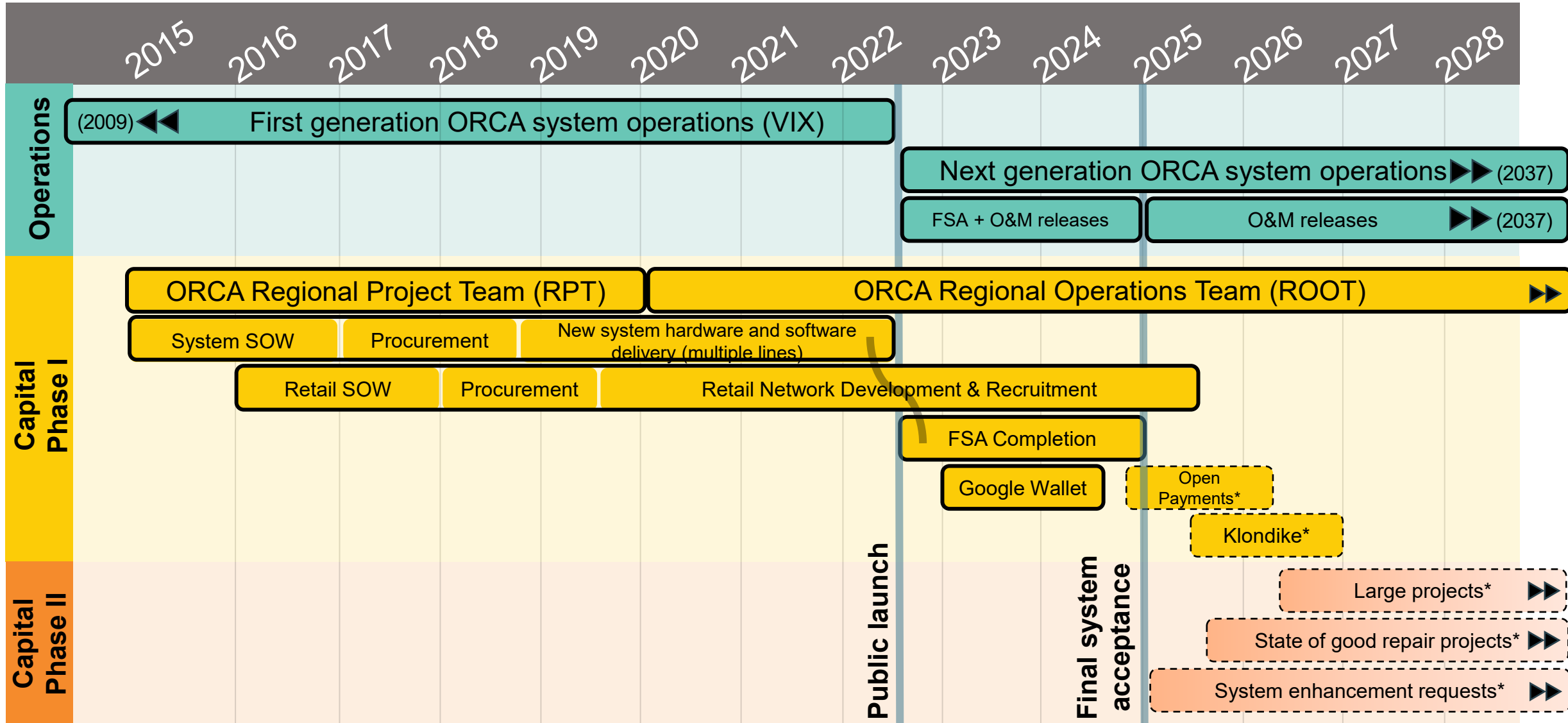
7/30/2025

# Goals



- Review ORCA program timeline
- Revisit and confirm business outcomes
- Define what success looks like
- Help us prioritize our workstreams
- Provide feedback on strategic approach

# ORCA program timeline

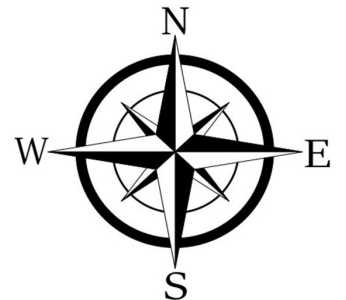


\* Schedules to be confirmed

# ORCA business outcomes



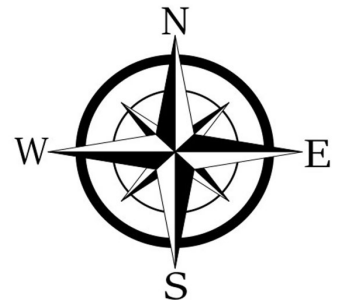
- ORCA Joint Board's Prioritized goals through 2027:
  1. Increase ORCA access for vulnerable customers
  2. Increase ORCA usage among transit riders
  3. Increase internal customer satisfaction
  4. Contain ORCA operating costs
  5. Make payment more seamless and affordable across transit and non-transit modes.
  6. Acquire new transit riders onto ORCA



# ORCA Agency Roundtable



- Share business needs and risks from your agency that ORCA can support.
  - CT
  - ET
  - KCM
  - KT
  - PT
  - ST
  - WSF



# Defining success



- Balancing time, scope and cost



"We want to deliver more ORCA features and products faster."

"We want to contain the cost of ORCA and maximize revenue generated for Agencies".

"We want a highly customized solution that meets the detailed and complex needs of agencies and all customer use cases."

# Defining success



- Focusing on outcomes over outputs

## Output

**Deliverables, features,  
increments**

Answers the questions:

- What did we create?
- How many did we create?
- When did we create it?

## Outcome

**The result or difference  
made by an output**

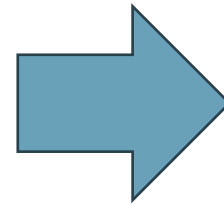
Answers the questions:

- Who benefits from our outputs?
- Why did we create those outputs?
- What impact did our outputs have?



# Defining success

- Shifting how we think about success



“How many tasks did we complete?”

“What are the highest value things we can do next?”

# Phase II workstreams



## O&M Releases

*Operations and maintenance release activities managed by INIT and ROOT including bug fixes, system upgrades, tariff changes and data updates.*



## Large Projects

*New products with many features, user interfaces and/or data requirements, require 3<sup>rd</sup> party integrations, internal readiness programs and/or large-scale customer communication.*



## State of good repair

*A large project that supports running a payments platform for seven transit agencies, including security, compliance, data systems, financial systems, and hardware and network upgrades.*



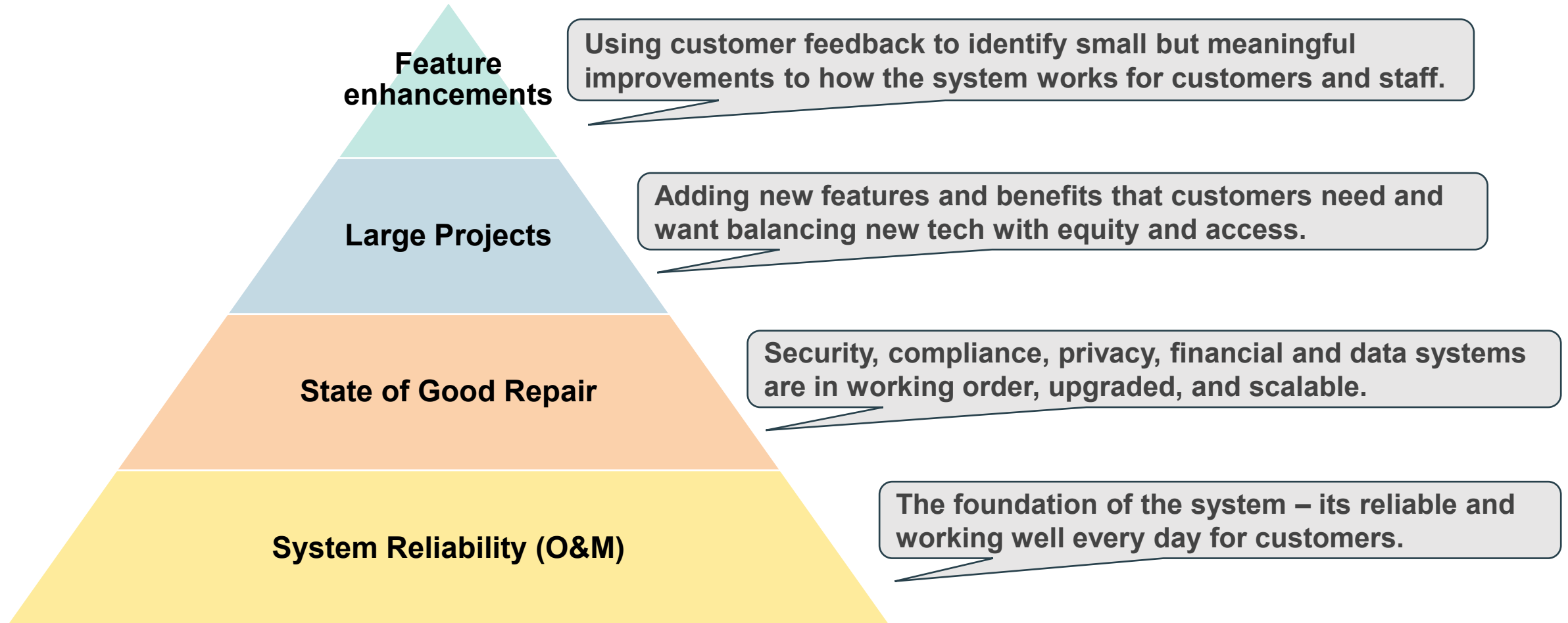
## Feature enhancement requests

*Internal or external user requests for small improvements that will increase efficiency or improve the ORCA experience.*

# Prioritizing workstreams



- An example of an agreed upon hierarchy of needs



# Defining success

- Capacity for delivery: an example

Workstream Projects Per Year	Today	Future State
Large Product Launch	1	1-2
State of Good Repair Project	0	1
Feature enhancement requests	5	20



This is a multi-year journey that has important dependencies on resourcing and 3<sup>rd</sup> parties.

# ROOT Strategy pillars



## Process Improvement

- Optimal Product Process
- Project and program management
- Training, tools and resources

## Regional Engagement

- Collaborate with Business Managers, Product OAC and SME OACs on the Optimal Product Process
- Identify additional capacity to increase product delivery, operationalizing and going to market

## Resourcing the ask

- Product Management resources
- Aligning all ROOT branches to the Optimal Product Process
- Exploring more resources including direct contracting and consulting

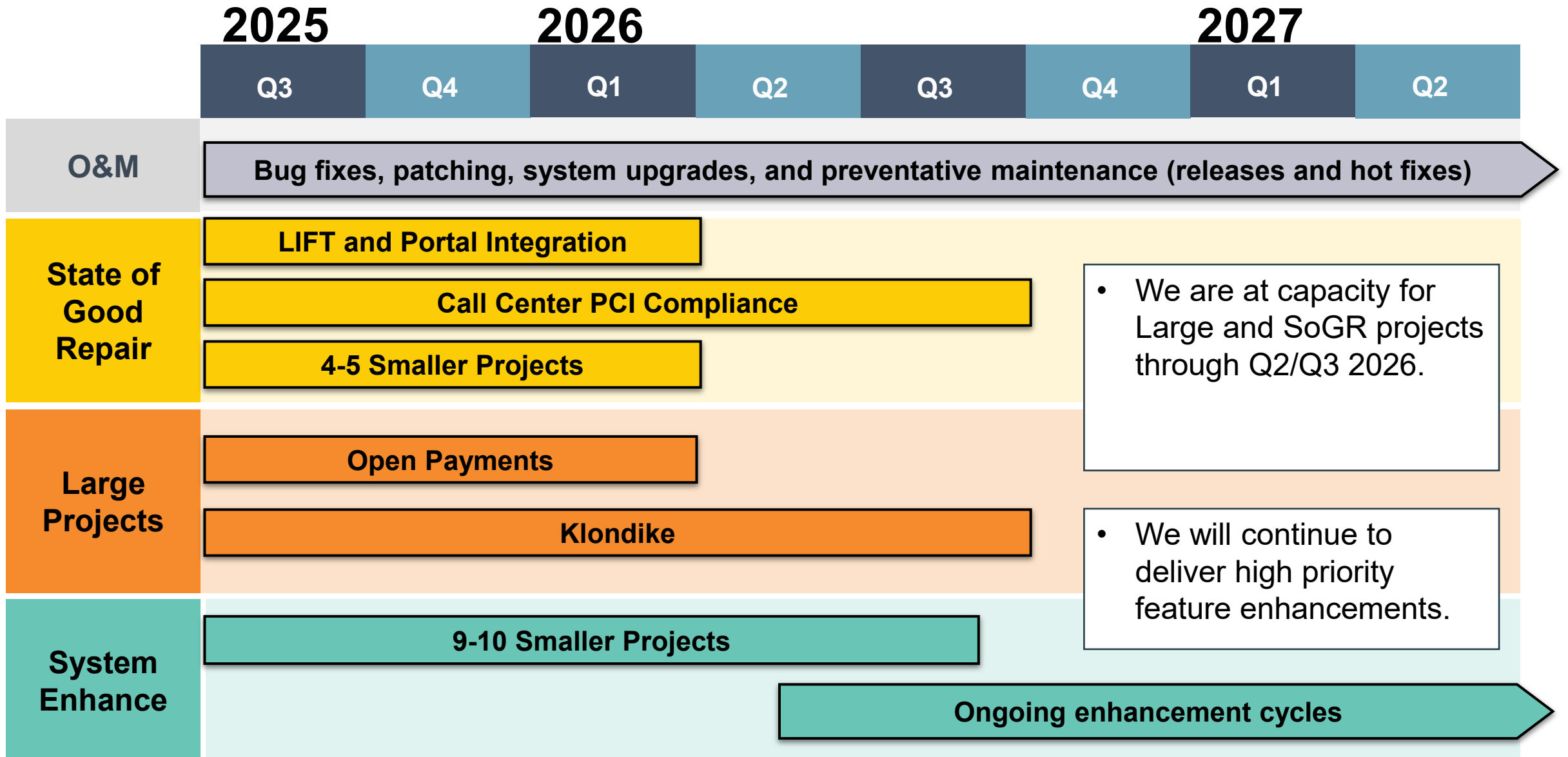
## Vendor management

- Engage leadership
- Make it a win-win opportunity
- Set clear expectations
- Ensure accountability
- Measure performance
- Increase vendor capacity and speed

SUCCESS



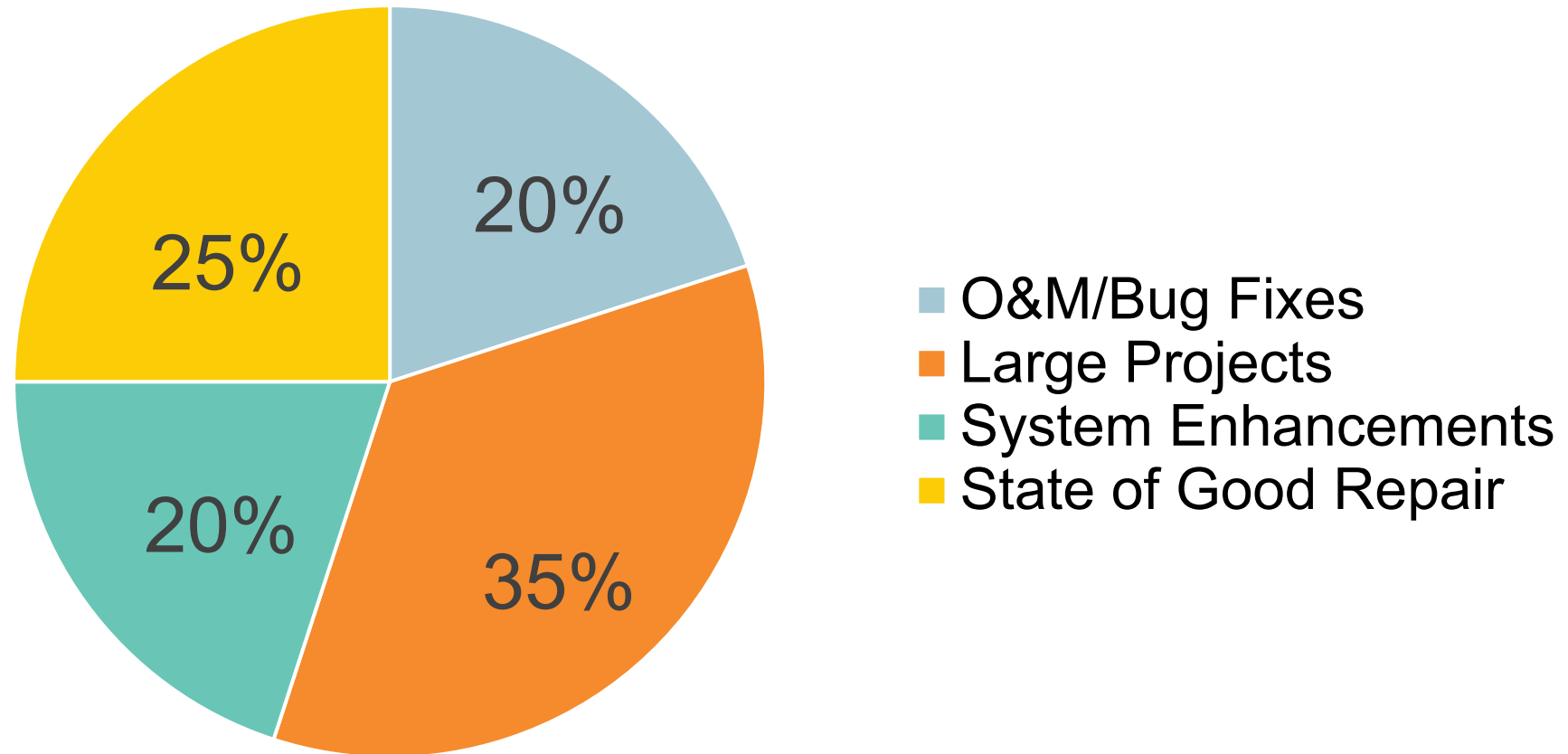
# ORCA roadmap – work in progress



# ROOT current capacity allocation



- ORCA product capacity is distributed across workstreams, with an emphasis on delivering large projects.



# Next steps



- ROOT and Product OAC will take your feedback and develop a recommendation for the next projects to add to the roadmap.
- We will focus on the next large and state of good repair projects.
- We will return to the board with this recommendation for large before the end of 2025.
- Smaller feature enhancements will continue to be managed at the staff level with progress reports to the board.

# **Discussion and closing remarks**

**Thank you.**



How the Puget Sound gets around