IMI Demonstration Project - STEPS to MOD and MPI
Agenda for Project Kickoff Workshop
September 14th - 17th, 2020
9:00am - Noon (PST)

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DAY 1 - Project Introduction

The link to the Webex Virtual Event for this session is:
https://tmshare.webex.com/tmshare/onstage/g.php?MTID=ec67e4faa68d0b77cbfdf940361aca81c
Event Password: trimet

Time	Presenter	Topic
9:00 am	*TriMet:* Bibiana McHugh, Project Lead Doug Kelsey, GM Tim McHugh, CIO	**IMI Project Vision** **Opening Remarks**
9:30 am	Murat Omay, FTA	**FTA Introductory Remarks** Overview of IMI Demonstration Program
9:45 am	Participant Introductions	**Participant Introductions** Briefly state: name, organization, position, role/interest in project
10:15 am	Madeline Steele, TriMet	**Workshop Overview** Workshop objectives, break out and logistics Project resources and logistics
10:30 am	BREAK (breaks will be 15 minutes to allow people to check messages, etc.)	
10:45 am	*TriMet:* Rhyan Schaub Sophia Maletz	**Innovative Payment** - State of the Practice, Related Initiatives - Project Overview
11:15 am	*IBI Group:* Ritesh Warade Jon Campbell	**Customer Experience (OTP)** - State of the Practice, Related Initiatives - Project Overview - Related IMI Demonstration Projects - Other OTP Developments - How do these initiatives relate/fit together?
11:40 am	*Fehr & Peers:* Marshall Ballard	**Mobility Data** - State of the Practice, Related Initiatives - Project Overview
12:00 pm	CONCLUDE FOR THE DAY	

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DAY 2 - September 15, 2020

Breakout Sessions	Track 1 - Innovative Payment *(Focus on Open PYMTS)*	Track 2 - Customer Experience	Track 3 - Mobility Data
9:00-9:50 am	**1.2a Open Payments:** Explore and demonstrate adding concession fare to open payment systems Facilitator: TriMet Agenda / Notes Link	**2.2 Existing Conditions:** Current State of the Practice for OTP/Predictions Facilitator: Ritesh Warade/Jon Campbell Agenda / Notes Link	**Performance Metrics:** Reviewing FTA proposed metrics and developing project-specific metrics. Facilitator: Marshall Ballard Agenda / Notes Link
9:50-10:00 am	BREAK		
10:00-10:50 am	**1.2b Open Payments:** Explore and demonstrate extending open payment to offer monthly capping Facilitator: TriMet Agenda / Notes Link	**2.2 Prediction Engine:** Brainstorm, Preliminary Design, Planning Facilitator: Ritesh Warade/Jon Campbell Agenda / Notes Link	**Performance Metrics:** Reviewing FTA proposed metrics and developing project-specific metrics. Facilitator: Marshall Ballard Agenda / Notes Link
10:50 - 11:00 am	BREAK		
11:00-11:50 am	**1.4a Open Payments:** Explore open-loop payment solutions that can serve as an additional means for the un-/underbanked to better access mobility services. Facilitator: TriMet Agenda / Notes Link	**2.2 Prediction Engine:** Brainstorm, Preliminary Design, Planning Facilitator: Ritesh Warade/Jon Campbell Agenda / Notes Link	**Data Management Plan:** Working Session Facilitator: Marshall Ballard Agenda / Notes Link
12:00 pm	CONCLUDE FOR THE DAY		

DAY 3 - Wednesday September 16, 2020

Breakout Sessions	Track 1 - Innovative Payment *(Focus on Virtual Cards)*	Track 2 - Customer Experience	Track 3 - Mobility Data
9:00 - 9:50 am	**1.4b Retail Network:** Explore and demonstrate expanding the ability to load cash funds to virtual card accounts through the retail network. Facilitator: TriMet Agenda / Notes Link	**N/A**	**Dashboards:** Develop System Requirements Facilitator: Marshall Ballard Agenda / Notes Link
9:50- 10:00 am	BREAK		
10:00- 10:50 am	**1.3 a&b Concession Fares for Virtual Cards:** Explore and demonstrate expanding Hop® virtual cards for Honored Citizen and Low Income account. Explore and demonstrate expanding Hop® virtual cards for Institutional accounts Facilitator: TriMet Agenda / Notes Link	**N/A**	**Dashboards:** Develop System Requirements Facilitator: Marshall Ballard Agenda / Notes Link
10:50- 11:00 am	BREAK		
11:00- 11:50 am	**N/A**	**2.1 Customer Communication:** Explore enhanced customer communication around fare capping as a traveler incentives and rewards program Facilitator: TriMet Agenda / Notes Link	**N/A**
12:00 pm	CONCLUDE FOR THE DAY		

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DAY 4 - Thursday September 17, 2020			
Breakout Sessions	**Track 1 - Innovative Payment (*Focus on Research*)**	**Track 2 - Customer Experience**	**Track 3 - Mobility Data**
9:00-9:50 am	**1.1 Business Case for Integrated Payments** Facilitator: TriMet Agenda / Notes	**2.4 OTP Roadmap** Planning for Integration & New Features *Web Conference Room* Facilitator: Jon and Ritesh Agenda / Notes	**N/A**
9:50-10:00 am	BREAK		
10:00-11:30 am	**N/A**	**2.3 City of Portland:** Partnering to scale the City of Portland Transportation Incentive Program *Web Conference Room* Facilitator: TriMet Agenda / Notes	**N/A**
11:00 am	END		