

To: Metrolinx Board of Directors
From: Kathy Haley, President, Union Pearson Express
Date: September 5, 2014
Re: **UP Express Quarterly Report**

Key Highlights

The UP Express program remains on track for revenue service in the spring of 2015. With less than eight months to launch, project elements are coming to life across the entire system, including construction, operations, customer service, guest experience and technology. Over the course of the last quarter, teams remain focused on execution and preparing for integrated testing and commissioning of the entire UP Express system. Overall, UP Express continues to remain on budget of \$455.5 million (\$2010). 90% of the infrastructure budget is committed (\$411M) and disbursements are now 63% of the total budget.

1. Capital Infrastructure

Progress on construction continues at all stations and substantial completion dates will be met. Since the last report, the following milestones were achieved:

- Substantial completion of Pearson Station and Spur line at the end of July.
- Successfully completed Phase I testing of the platform-screen doors at Pearson.
- The installation of the heavy rail and signal systems along the spur line continues to progress.
- Structural steel elements for the UP Express station at Union were completed, along with the station exterior building envelope.
- Continued progress on station building steel structure at Weston Station.
- Completed installation of the UP Express platform and the building envelope glass at Bloor Station.



UP Express signage at Pearson Station lit up at night

2. Technology

- A competitive procurement process to select an electronic-ticketing (e-Ticket) solution was completed.
- Continued implementation of PRESTO on UP Express in order to increase seamless travel connectivity across the region and Ottawa. Build 1 of the website and mobile website has been completed, and Build 2 is currently under development and testing.

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- The Display Management System, a central system that allows us to manage the media and flight information display screens, is currently under development.
- The Customer Communications Management System (CCMS), a system that will be used by Customer Care to manage service and status information across the GO/UP network, is currently being tested, with a target go-live of the first release this fall.
- Design activities for the voice-over-IP project are underway.
- A Wi-Fi vendor was selected through a competitive procurement process and detailed planning efforts are underway to enable Wi-Fi access on our vehicles and in stations for UP Express guests.



3. Operations

- The first two pilot vehicles have arrived in Toronto at the VIA Train Maintenance Centre facility and are in the early stages of static testing and commissioning. Additional vehicles are scheduled to arrive in late fall.
- Currently, nine vehicles are at the Sumitomo facility in Rochelle, Illinois, in various stages of build and fit out. Remaining vehicles will begin their journey from Japan in September.
- Operational plans related to station, rail, fleet and corridor maintenance, safety and security planning, and emergency plans are continuing to be refined to ensure operational readiness at launch.
- Bombardier continues to train the operating crew for the UP Express service.
- The RFP for the Guest Service Representatives closed in July, and the evaluation process is underway.
- Elements of the uniform prototypes were received and a review for fit and material was conducted.



UP Express vehicle testing at Rochelle facility

4. Integrated Testing & Commissioning

We have begun preparing a testing and commissioning program to validate that project elements are integrated to provide a safe, functional system that operates in accordance with the envisioned guest experience. Of note this last quarter, teams have:

- Developed an overall system integration plan.

- Created over 60 test case scenarios – resulting in over 300 tests across the system - to capture the integration between Technology, Capital Infrastructure, Operations, Marketing and Business development from both a functional and people perspective.
- Developed an integrated testing and commissioning schedule to plan for execution of the test case scenarios based on project milestones and dependencies.

5. Business Planning and Customer Experience

Teams continue to work on implementing the elements of the UP Express differentiated customer experience, ensuring that our planned guest experience comes to life. Achievements over the last quarter include:

- Continue to define our guest-facing terms and conditions, along with relevant policies and procedures to support a differentiated guest experience.
- Developing a master training plan to support technical and customer service training requirements across the organization.
- Completing an interline agreement with VIA Rail to enable seamless ticket purchase for VIA customers.
- Begun implementation of retail design and build-out activities for the UP Express station at Union.
- Continue to progress on key areas of integration with the GTAA, including the implementation of an interim operations and maintenance agreement for Pearson Station along with drafting of agreements related to securing space for ticket sales inside Terminals 1 and 3.

6. Marketing, Business Development and Communications

Our marketing, business development and communications activities continue to progress. Of significance:

- Profiled the progress of construction with the [Toronto Star](#), [CTV](#) and [CBC](#).
- Launched UP Express social media channels on Facebook, Instagram and Twitter in July and executed a #trackthetrains engagement activity to encourage users to track the travel of the UP Express vehicles into Toronto.
- Continued to reach out to key stakeholders in hospitality and tourism, including Tourism Toronto who sent out 100,000 Toronto Visitor Guides to various parts of Ontario, which noted the spring 2015 launch of UP Express in the transportation section.
- Continued to progress on developing a comprehensive marketing program designed to drive awareness and ridership.
- Work continues to refine the business-to-business strategy to support a robust corporate accounts program. To date, over 80 meetings have been held with interested parties.
- The Strategic Partnership program continues to generate significant interest across various industries, including financial services, professional consulting services, information technology and telecommunications.



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The UP Express has entered a critical period as we countdown and ready for launch. The next three quarters require fastidious attention to detail, as well as the ongoing identification and monitoring of interdependences, potential risks and mitigation strategies. Teams across Metrolinx, along with our external partners, are working together to ensure that all of the program's 100 projects are executed as per plan.

Respectfully submitted,

Kathy Haley
President, UP Express