

Part I

Chronological Summary

- 7-30-68 - General Manager O'Connor appoints C. E. Keiser, P. J. Meinardi and G. Krambles as a committee to develop a plan to reduce handling of cash by operators.

- Aug. - Preliminary explorations were made of possible systems which
 Sept.-Oct. would continue making change by day but operate as lock boxes with no change made at night. No practical such system was found.

- 11-7-68 - Assignment of committee changed to develop plan to eliminate handling of cash by operators.

- 12-2-68 - Task force subcommittee of H. F. Brown, C. G. Kalogeras, G. T. May and J. R. Tucker were delegated to study existing systems and select the several best for final selection by committee.

- 12-11-68 - CTA and ATU sign contract agreeing to institute Exact Fare plan on CTA buses in November 1969.
 Preparation of application for grant from DOT began.

- 1-14-69 Preliminary application for federal aid grant submitted to DOT.

- Dec. 1968 - Subcommittee and committee review of existing systems reveals
 Feb. 1969 inherent weaknesses which jeopardize receipts and personnel handling farebox collections. Also turns up two possible suppliers, Duncan and Tiltman Langley (Denstar) who have systems under development which appear to avoid those weaknesses.

- Mar.-June - Frequent meetings held with those suppliers to establish ideal
 1969 design criteria.

- May 1969 - Preliminary recommendations of committee submitted that permanent system use non-registering lock boxes that accept paper money, scrip, tokens and all coins up through half dollars, and to process the money centrally.

(more)

- 6-13-69 - Competitive proposals with delivery dates invited from Broach, Denstar, Duncan, General Register and Johnson (Keene). Responses received from all. Evaluation begun and further conferences held with suppliers.
- 7-16-69 - Committee submits report to General Manager recommending acceptance of Duncan system.
- 7-31-69 - Full application for federal aid grant submitted to DOT.
- Aug. 1969 - Because of impossibility of manufacture of total requirement of fareboxes by Duncan within the November deadline, decision is reached to purchase 1613 Duncan fareboxes and 1522 conversion pedestals to utilize existing Johnson fareboxes for an interim period, with option to purchase additional Duncan equipment to phase out the conversion units at a more convenient time.
- 8-28-69 - Dept. of Transportation issues letter authorizing CTA to commit funds for purchase of 1613 Duncan fareboxes without prejudice to inclusion of such in the grant project that CTA had submitted for its consideration.
- 9-4-69 - Chicago Transit Board authorizes award of contracts for fareboxes and receiving vaults. Contracts subsequently placed and those pertaining to permanent equipment only submitted to DOT for concurrence.
- 9-16-69 - DOT representatives discussed project with Duncan and CTA representatives and made field inspection of work in progress.
- Sept.- - Operating Manager discusses project status at intervals with
Oct. 1969 Amalgamated Transit Union president. Also frequent progress and development meetings held with suppliers. CTA engineering and electrical department forces design, then construct facilities for handling fareboxes and revenue processing at garages.
- 10-28-69 - General Manager holds project status meeting with staff. See part II for notes. Announces that Exact Fare will begin November 9 on lines out of Archer and Kedzie garages.
- 10-30-69 - Chairman DeMent holds press conference with President Scholl of ATU to announce effective date.

Part II

Status Report as of 10-28-69

1. Keene farebox conversion pedestals: 78 were delivered to Limits Thursday but due to a numbering error they must be returned. D. M. Flynn expects new delivery schedule later today, with sufficient on hand to equip Archer and Kedzie garages November 9. J. J. Repplinger will install these boxes November 7 and November 8.

Five garages to have Keene interim boxes are:

Archer	309 buses assigned
Kedzie	272 MB + 27 TB
Limits	158
77th	413
North Park	331
Total	1483 MB + 27 TB = 1510

Conversion pedestals

on order	1522
Spare =	12

2. Duncan having trouble with fitting of components. Delivered one farebox today but not expected to deliver enough to do any station until after November 9. 52nd will probably be the first Duncan garage.

Seven garages to have Duncan fareboxes are:

	<u>Buses assigned</u>	<u>Collection vaults</u>
52nd	129	2
Beverly	162	2
Lawndale	139	2
Keeler	142	2
69th	324	3
North	185 MB + 209 TB	5
Forest Glen	235 MB + 97 TB	5
Total	1316 MB + 306 TB = 1622	
Spare-rotate	—	19
Fareboxes (vaults)		
on order	1613	(40)
Short =	9	—

3. Duncan will meet with E. E. Olmstead and C. G. Kalogeras at 5 pm today for final resolution of details of movable receptacle-vaults. Four should be furnished to make first garage workable, but various means of improvising operation with less than four, or even none, are under consideration.
4. Outer shell for Duncan vaults at seven garages are in bid. Can start to operate without.
5. Canopies are needed for 69th, North and Forest Glen. Bids open 10/29. Can start to operate without.

6. Shelters are on requisition. Can start to operate without.
7. ADT alarms not yet requisitioned. Can start to operate without.
8. Bullet-resistant doors for temporary central counting room at 77th are on order. Delivery promised this week. Can install in two days.
9. Bullet-resistant glass for counting room guard booth is on order, with delivery uncertain. Will use lexan plastic temporarily.
10. Electrical work for lights and machinery in central counting room and other counting areas is keeping pace with alterations to buildings.
11. Electrical work for ADT alarm system has been ordered but no field work is yet done. Can start to operate without this.
12. Vault roof is to be poured this week. Waiting for structural steel, promised this week. Can start to operate without.
13. Toilet and lunch room are almost done.
14. Truck dock is nearly complete. Need sliding door. Engineering will improvise. Wiring yet to be done. Complete by November 7.
15. Fork lift rental for vaults is on order. Delivery on demand.
16. Three pallet lifts to handle receiving vault on and off island and truck are on order. Delivery on demand.
17. Pallets for money bag handling are on requisition. Can start to operate without, using 1st National Bank supplies.
18. Sorting tables are not yet requisitioned. Can start to operate without them by improvising.
19. Sewing machine for sealing money bags is on order, with delivery promised for 10/29.
20. 2500 money bags are on order. Can start to operate by using present and 1st National Bank bags.
21. Scales for checking money count are on order and are available from stock.
22. Two of the ultimate four giant money sorters have been scratch-built at south shops. Final assembly in place in the temporary counting room at 77th began today and should be finished November 1. These two sorters can probably handle the load of collections from the first seven Duncan-equipped garages.

23. Thirty-six high speed coin counters for the above sorters are on order and the first 16 are due to be delivered on November 15. In the meantime the collections of first garage or two converted to Duncan system can be counted using obsolete slow counters on hand.
24. Time recorder for counting room payroll control is on order for delivery 12/5/69. Can start to operate without this.
25. Rental of two trucks for money collection is on requisition, with order expected to go out in one day. Trucks are available November 5 or 6. They will have the rental company's paint job. CTA must determine and provide special locks if it wants them.
26. Four sets of radio-telephone needed for trucks and future maintenance car have been requisitioned. Order authority will be ready for board action November 6. Availability thereafter probably within two weeks plus three days for installation. In meantime, T. B. O'Connor authorized radio to be taken from his car if necessary so that truck handling money has communication.
27. Rings for handling currency in Duncan system have been ordered for delivery in six weeks. In meantime paper clip can be used to weight paper money.
28. Refund envelopes are to be delivered November 1. An additional quantity has been requisitioned.

Operational and manpower decisions

29. Farebox maintenance will be carried out by shop department personnel working in secure area of counting room. Tools, fixtures and parts will be responsibility of shop department, but keys will be responsibility of treasury department. Street maintenance on fareboxes will be discontinued and buses with boxes that have defects that make it impossible to complete a run will become road calls. Fareboxes can then be changed out in garages and sent to central counting for repair.
30. Purchase of maintenance car will be deferred for reconsideration at a later stage of the project.
31. A pick will be held to determine who is to work the following jobs in the transportation and treasury departments:

111	Clerical
36	Money handlers and their supervisors in five transportation department stations.
13	Money handlers and their supervisors in treasury department central counting room.
Total	160 General office salaried jobs

61 Cashbox pullers (hourly rated) in the 12
transportation department stations, to
be filled from qualified bus operators.
Grand total 221 Employees represented by Division 241

Effective date of this pick will be upon (or nearly upon) completion of
changeover to lockboxes at all 12 locations.

The job content, evaluation and work schedules of all of these jobs
were submitted to 241 committee on 10-27-69. Some modifications
to schedules must yet be made to provide rotation, but this should
not delay effective date.

32. Resolution has not as yet been made of future job duties of present
collectors. Present procedures will be continued until new can be
developed. Emp. relations, transp., treas. and sched. depts. will handle.
33. Training of bus operators, cashbox pullers, etc., will begin as soon
as equipment is available and 241 agrees on procedures. Expect
to demonstrate boxes to 241 stewards 12-28-69.
34. Each collection truck will be manned by a service truck chauffeur and
a service truck helper from utility department. Schedules will be
prepared by treasury department. Work shifts are expected to be
9 pm - 5 am.

Token sale information

35. Adequate supplies of 40¢ (650 size) and 20¢ (800 size) tokens are on
hand.
36. Tokens will be sold at 12 surface operating stations and 9 rapid transit
terminal offices, Monday-Saturday, 8 am-6 pm, adult 40¢ tokens
in packages of 10 for \$4, and rolls of 60 for \$24. Also, 20¢ child/
student/senior citizen tokens in packages of 10 for \$2, and rolls
of 60 for \$12. Sales will be by the chief clerk and station super-
intendent. Sales will also be made by CTA treasury department,
room 7-160, Merchandise Mart, Monday-Friday, 8 am - 4 pm.
37. Sale by other than CTA is now being negotiated. Expect association-
member currency exchanges, savings and loan associations,
neighborhood and loop banks and some department and drug stores
throughout whole service area to sell tokens. Most are to obtain
their stocks at CTA operating locations. Tokens will be sold to
them at same prices and in same packages as described above.
They are not limited as to the price or quantities in which they
may sell to the public. All wholesales of tokens will be on
cash basis, except substantial (5000 or more) users, who may
open an account with CTA.

38. Token sales will begin 11-3-69.

Refund system

39. Refunds for payment in excess of fare will be available if the amount a passenger offers is more than the fare but not less than 50¢ nor more than \$5. Amount of refund and amount offered will be punched into serially-numbered refund envelope by operator, who will detach and give passenger receipt portion. Remittance will be sealed in the envelope and deposited in farebox by operator through the currency wheel.

40. Passenger may claim refund at the CTA operating locations or the Exchange National Bank not less than 5 nor more than 60 days from issue. Accounting department will issue daily control lists.

41. Training of personnel will begin when materials become available and 241 agrees to procedures.

42. Refund envelopes will also be used on buses with Keene fareboxes to accept payment of portions of exact fare offered by passenger in half-dollars, one-dollar or five-dollar bills. In such cases, envelope will be punched to show that no refund is due and receipt portion will be deposited with the envelope by the operator into the farebox through the currency wheel.

This procedure is not needed on buses with Duncan boxes which accept half-dollars and currency through the regular opening at top of box. For Duncan boxes, currency should first be rolled into ring furnished by operator.

Miscellany

43. Transfers will continue to be charged to operator, recorded on his trip sheet, and unused supply returned at end of run. Computation of value sold will not be required however.

44. Trip sheet reorganization to eliminate register readings is being carried out by transportation department but bus and box numbers will continue to be recorded. Cashbox pullers will record register readings for Keene fareboxes on cashbox card, which is to be reconciled later with the actual cashbox count.

45. Graphics for signs in buses, operating stations and sales outlets completed by research/planning department 10-28-69. Printing has been ordered for delivery early next week. Public information, research/planning and shops departments will confirm precise location for installation on each series of bus by 10-31-69.

46. Copy and production for press release and seat distribution leaflet will be completed by public information department by 10-31-69. Photos for press kit will be completed by photographic department 10-29-69. Displays with sign samples for Chairman's press conference will be completed by research/planning department 10-30-69.
47. Federal grant application continues under review by DOT. Letter from Urban Mass Transportation Administrator is expected to broaden present "no prejudice" authority to confirm CTA purchase of components of permanent (Duncan) fare collection system and related work by construction forces. Some additional documentation, including this status report, is also required of CTA purchasing and research/planning departments.

Addenda

48. Eight old buses have been converted into cashbox vans with shelving (to follow 1.) for moving Keene cashboxes between bus servicing areas and local counting rooms. Five more will be ready by November 7. Buses are set not to shift from low speed. Shop department will obtain padlocks and turn keys over to D. M. Flynn
49. Twenty sorter counters are on order. H. F. Brown to advise status. (to follow 23.)

Submitted by



Supt. Research/Planning
10-31-69 GK:mb

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in compliance with procedural
requirements for capital grant
projects established by
U. S. Dept. of Transportation
Urban Mass Transportation Administration