

**Performance Evaluation
June 16, 2021, to June 30, 2022**

**Sam Desue, Jr.
General Manager**

OVERVIEW:

The review is to document the TriMet Board of Directors' understanding and evaluation of the General Manager's performance between June 16, 2021, through June 30, 2022. General Manager Sam Desue was hired into the position on June 16, 2021, after serving 4 months as interim General Manager, while concurrently serving as Chief Operating Officer and acting Executive Director of Transportation. Mr. Desue initially provided the board with his 100-day Plan. In September 2021, the Board President along with the General Manager began development of his work objectives for Fiscal Year 2022 (FY22 Work Plan) for the balance of fiscal year to ensure his success as the General Manager and move the agency forward on major policy issues important to the Board.

The 100-day Plan focused on ridership, the employee experience, community and partnerships, financial capacity and equity, diversity, and inclusion. The FY22 Work Plan defined major business objectives, measures of success, and a general weighting of the objectives that would be considered as the major indicators of performance.

During the past year the agency and General Manager experienced numerous unprecedented challenges and opportunities. For example:

- a "heat dome" in June 2021 with several days of 110-degree temperatures illustrated the climate resiliency limitations of the operating system, resulting in suspension of some service when temperatures exceeded the threshold that bus and light rail vehicles could operate safely,
- the continuation of a pandemic that required extra safety and cleanliness precautions throughout the system, as well as increased employee absences due to COVID
- a reduction in ridership that impacted fare revenue
- street riots and demonstrations that impacted service and operator safety,
- increase in gun violence that disrupted service and caused operator safety concerns,
- increase in homelessness and outdoor camps being located too near light rail lines,
- increase in mental health issues and drug use among riders,
- resignation of the following Executive Directors: Transportation, Finance, Engineering and Construction, Safety and Security, and the Governmental Affairs Manager,
- operator shortage created by the "Great Resignation" and the difficulty in recruiting new operators that resulted in additional service reductions,
- an aging infrastructure subject to occasional failure that delayed service,
- the bright light was the receipt of \$438.9 million federal stimulus funds: American Rescue Plan, CARES Act (Coronavirus Aid, Relief, and Economic Security), CRRSA (Coronavirus Response and Relief Supplemental Appropriations) that were used to cover shortfalls from other revenue sources.

At times these events required changes in priorities and in some cases new initiatives.

SUMMARY:

Despite all the unanticipated challenges, Sam Desue has met the Board's objectives as General Manager for both his first 100 days and for most major business objectives and deliverables contained in the FY22 Work Plan. The accomplishments this past year reflect the General Manager's leadership but also, are a tribute to the dedication and commitment of the staff. The following sections will review the accomplishments realized as well as those either deferred or continuing in process.

ACCOMPLISHMENTS:

1. Customers

Safety for both riders and staff is a high priority of the board and agency. TriMet has implemented recommendations from the Reimagining Public Safety initiative. One initiative included providing training for all employees, including board members, on cultural competency, mental health, de-escalation, and anti-racism. In partnership with Multnomah County Public/Behavioral Health Department, a Reimagine Community Coordinator has conducted outreach across the Tri- County area alongside TriMet Community Engagement Coordinator. Outreach included consumer groups, health and public safety, crisis response/mental health and homelessness services.

The Reimagining Public Safety Initiative provided updates to the Board and created a public advisory committee that is helping move the work forward. Existing training resources have been audited, new trainings have been provided, and a community training Request for Proposal (RFP) was completed, and new training products are under development.

The Security team made significant progress in expanding its footprint geographically and increasing presence on the system through the development of a Safety Response Team, formed as part of the Reimagining Public Safety efforts. These positions are an unarmed team that attempts to connect people in and around the system with community-based resources while discouraging inappropriate behavior. The team currently is staffed with 26 Safety Response Team Members and an additional 22 are scheduled to be hired for a total of 48. However, the overall security numbers on the system have not met the FY22 goals due to the difficult conditions present in the labor market. Currently there are 18 Customer Safety Supervisors who patrol the system and discourage inappropriate behavior as well as assist riders and staff; an additional 19 positions have been funded and are pending recruitment for a total of 37.

To support safe service related to the global pandemic, all vehicles continued to be equipped with hand sanitizer and mask boxes and were refilled daily by cleaners during the end of line cleaning. In addition, all employees had access to the proper PPE; including N-95 respirators, surgical masks and Nitrile gloves in stock and always available.

Supporting efforts to increase ridership TriMet hired a consultant to complete a Comprehensive Service Analysis to better understand current and future travel demands and make recommendations for future bus system routes. The project was named "Forward Together". The analysis was completed and recommendations will be considered for implementation beginning in FY23. The project has developed a community outreach strategy to engage community in the Forward Together effort. To date outreach has engaged dozens of community organizations in communicating the project and conducting surveys across the three counties with responses in Spanish, Russian, Vietnamese, Ukrainian and Korean. The Board is eagerly awaiting the recommendations that will come forward through this analysis.

To ensure equitable distribution of services and resources across the TriMet system, TriMet implemented an Equity Lens and used it in informing the Reimagining Public Safety efforts and the development of the Forward Together Project. It is also informing: TriMet's Climate Action Plan; TriMet's Regional Transit Oriented Development Plan; the State Transportation Investment Fund (STIF) summer pass, Access Transit Plus and the Low-Income Fare Programs.

The development of an accessibility plan and timeline to advance the physical accessibility of the overall system was deferred until FY23 due to changes in staffing. To enhance TriMet's online trip planner the multi-modal trip planner was enhanced and integrated on the trimet.org main page.

The implementation of an agency-wide customer service staff training program to better support ridership was deferred due to the departure and onboarding of new director of customer experience.

To help shape the future of cities and our region in line with the Metro 2040 Growth Concept, the agency completed Phase I of the TriMet Regional Transit Oriented Development (TOD) strategy draft for public and stakeholder review. In addition, \$30 million was secured from Portland Housing Bureau to advance the Hollywood HUB project. In addition, the Fuller Road TOD construction is underway.

To provide attractive travel options during peak periods, TriMet completed the Federal Transit Administration (FTA) requirements and received approval for \$100 million in federal support to begin construction on the Better Red MAX Line Expansion and Improvement Project. Discussions were held with the Oregon Department of Transportation (ODOT) about allowing buses to drive on shoulder, however, no real viable projects exist at this time. Further discussions with ODOT are underway on toll mitigations involving bus on shoulder.

To advance the agency 2040 goal of having an all-electric bus fleet by 2040, tests of the first 60-foot articulated bus conversion from diesel to battery electric are in process and further safety testing is needed before it can be placed in service. Construction began on 12 additional bus battery chargers at the Powell Garage. Five new Gillig battery electric buses were tested and are ready to rotate into daily service from the Merlo Garage and 24 more were ordered. The implementation plan to transition the non-revenue vehicle fleet to electric is in process and will be implemented when funding is available for replacements and EV models are available. Greenhouse gas emissions were reduced by 70% by switching to R99 renewable diesel for all fixed-route buses, LIFT paratransit, and WES.

To ensure strong support for transit and TriMet, management held periodic meetings with senior FTA, state officials and key Oregon elected delegation members. More bus priority projects were put in place by the City of Portland.

2. Internal Business Practices

Work was initiated and is ongoing to identify and make physical infrastructure safety improvements to at-grade pedestrian safety crossings. In addition, a Crime Prevention through Environment Design audit was used to review three stations (Gateway, Parkrose and Gresham Central). Recommended improvements require a multi-year grant funded effort.

As part of the Reimagining Public Safety Initiative, and to attempt to prevent crime, a lighting audit was conducted at 9 locations. Lighting upgrades have been completed at: Parkrose, 82nd, 60th, Sunset, Elmonica, Willow Creek, Gresham Transit Center & Garage, Gresham City Hall Park and Ride, and Clackamas Transit Center, Garage and Platform.

The Information Technology (IT) Strategic Plan called for the enhancement of IT governance for improving IT systems and addressing technical debt and this was accomplished. One project has been approved and two additional projects are proposed.

Two efforts to develop higher capacity bus services were realized: The Division Transit Project is now ready for revenue service starting in September 2022 and planning is underway for the TV Highway bus rapid transit with a partnership with ODOT, Metro and Washington County.

The following efforts were completed to improve existing MAX infrastructure for reliability and capacity and reduce the agency's carbon footprint: the Lloyd District switch replacement project; and a climate resiliency review was performed to evaluate the overhead catenary system to see if it can withstand higher temperatures.

A carbon reduction strategy was completed and reflected in the development of a Climate Action Plan. The Plan recognizes the role TriMet plays in the increased use of transit to support state and regional transportation, greenhouse gas reduction and livability goals. A carbon lens policy was drafted that will be applied to a pilot project with the potential to be applied to all future projects.

As a step toward developing future climate actions with the FTA's Sustainability Challenge commitment as a guide, and to pursue long-term renewable electricity agreements, the agency completed renewal agreements with PGE and Pacific Power.

3. People and Innovation

Two-way communication was strengthened between the Amalgamated Transit Union (ATU) and management through monthly meetings between the General Manager and ATU leadership. Further efforts are ongoing. A more healthy, respectful, and collaborative environment is occurring between the parties and several memorandums of understanding were successfully developed that addressed the operator shortage and recruitment concerns. Ground rules were established prior to the starting of contract negotiations. Although it occurred in July 2022 (the next fiscal year, it's worth noting), TriMet and ATU leadership reached agreement to roll over a two-year contract commencing December 2022 through 2024.

An enhanced staff onboarding program was implemented as well as a robust program to recruit and retain staff and operators. A pay equity review project was completed that included an update to all current job descriptions and a market review.

To further achieve agency Affirmative Action goals a diversity consultant was hired to complete a review of other transit organizations and government agencies to identify best practices and possible strategies to improve TriMet's approach to diversity, equity, and inclusion (DEI) internal and external efforts and approaches. The consultant provided a report and eight recommendations to the TriMet General Manager and Executive Team. Two recommendations were completed: A chief equity position was elevated and moved to report directly to the General Manager and diversity, equity and inclusion training was provided for the Board of Directors and the Executive Team. The remaining recommendations are in process. In addition, an HR consultant was hired to revise the complaint process and make it more accessible to employees. An HR complaint workforce committee was also established to review practices and policies to ensure diversity and inclusion is a key focus.

4. Financial

A balanced FY2023 budget was developed, proposed, and approved on time and anticipates ranges of economic impact from ongoing COVID-19 and economic consequences and provides for safe and reliable levels of service. In addition, an asset management/replacement plan was developed that fiscally maintains safety and reliability.

To maintain acceptable farebox recovery to optimize the balance of service demands, revenue, and costs the board and management have agreed to participate in a day long Board Strategy Session on Passenger Fares in early FY23.

5. RECOMMENDED COMPENSATION CHANGES:

The General Manager’s current salary is \$354,320. Consistent with agency practice for merit increases, a 3% merit increase will be effective September 18, 2022, for a new salary of \$364,950. An executive compensation study for the General Manager was completed a year ago and the salary remains competitive in the marketplace.

TriMet Board President:

General Manager:

Linda Simmons

Date

Sam Desue, Jr.

Date

Attachments:

General Manager’s 100 Day Plan and Accomplishments

General Manager’s Objectives for Fiscal Year 2022 (Work Plan) and Accomplishments